TRACCESS CI 9.1

Knowledge. Capability. Assurance.

What's New

February 2012

Introduction

Our vision behind the newest version of TRACCESS CI was to give you, our customers, a Competency Intelligence system that is flexible, accessible, and easier to use. With a new, modern-looking interface, Version 9.1 includes many new and exciting features that have emerged directly from our customer's requests and the TRACCESS User Group conference. We are grateful to receive such valuable feedback from our clients, which has greatly helped us shape several key goals for this release.

It was important for us to provide you with improved accessibility for all features, particularly for reporting. The improved user interface, that includes a new Ribbon feature, makes TRACCESS a more visual and intuitive experience. Its ease of use renders it accessible to a wider audience. The completely reorganized Reports manager allows you to manage your reports in a well-structured environment. And the new On Demand Reports feature lets you to access and generate reports quickly and easily.

We have also included features that bring data to you in more interactive ways. Now, you can create interactive charts that present data in a highly-visual and customizable format. These charts can literally change the way a user interacts with TRACCESS, since the data in the charts can act as a jump-off point to navigate to desired areas in the system.

Much effort has been put into offering you more flexibility and ease in the creation and customization of data presentations. With the use of Excel charts, you can take TRACCESS data and create charts in editable Excel sheets.

Our development team has worked hard to offer you the many new features outlined in this What's New document. We are confident that the new user interface and new features included in version 9.1 has made TRACCESS CI more efficient and effective than ever. We look forward to hearing more of your feedback and ideas, so we can continue to meet the needs of our clients.

9.1 New Features

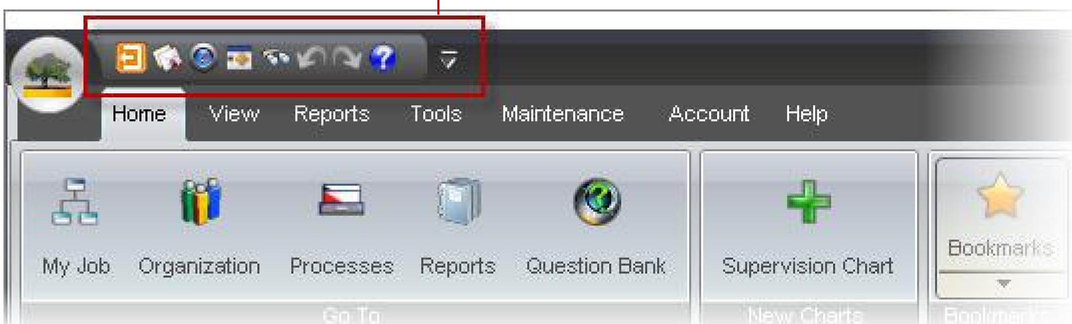
Improved User Interface

This release of TRACCESS is unveiled with an improved user interface. Now designed with a Quick Access Bar and a Ribbon, as well as a dashboard and a completely reorganized reporting area, TRACCESS is faster to navigate and easier to use than ever. This new look includes visual, easy-to-use, and intuitive icons, making it quick and simple to switch between different sections and functions in the application. Also supporting color themes, the new UI is more aesthetically pleasing to the eye.

Quick Access Bar

The Quick Access Bar, always displayed at the top of the TRACCESS screen, gives you easy access to the most commonly used functions, each represented by an icon: Logout, New Message, Dashboard toggle, Schedule, Search, Undo, Redo, and Help. Now, any time you want to use these functions, they are available to you with just one click. This menu is fully customizable—you can add (or remove) buttons, linking to your most commonly used TRACCESS features or other sites & applications.

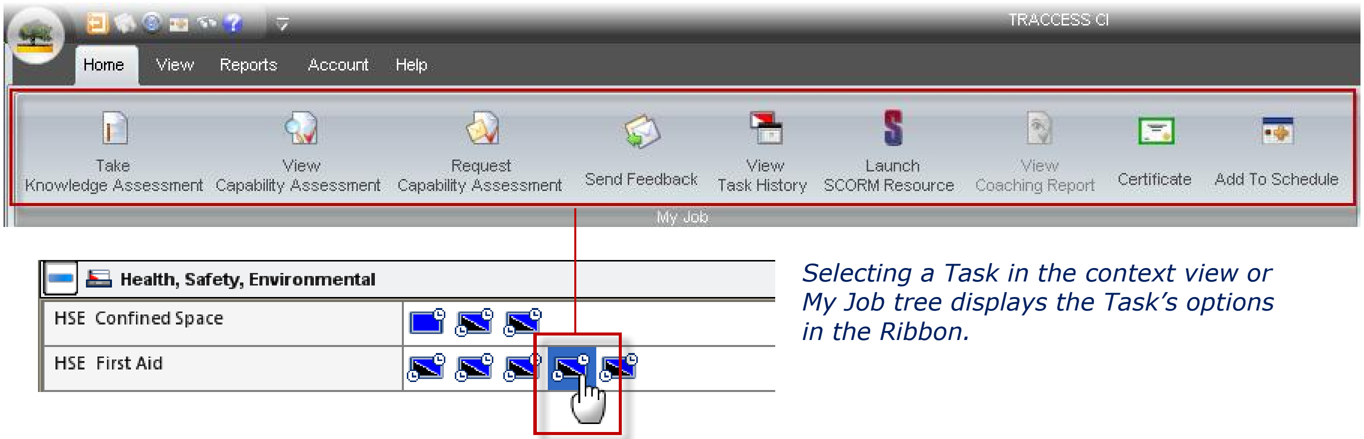
The Quick Access Bar gives you one-click access to your most commonly used functions.



The Ribbon

The Ribbon is designed to help you quickly find and use TRACCESS functions. Instead of looking for the function you need in a menu, functions are grouped together under tabs and are displayed as icon-based buttons. This easy-to-use layout requires fewer clicks; not to mention, functions are faster to find with their easily-recognizable icons.

The Ribbon bar items also change and display relevant functions dependent on the currently selected item in the TRACCESS system. This eliminates the need to right-click on an item to access its functions. Now, you can simply click on an item, and its functions appear in the Ribbon. This visual way of navigating is easier and faster than text-based menus. New users will also learn how to use the application more quickly because with each selection they make, there is visual feedback about what commands are available for the selected item.



Selecting a Task in the context view or My Job tree displays the Task's options in the Ribbon.

TRACCESS Dashboard

TRACCESS Today has a new look, new feel, and a new name: The TRACCESS Dashboard. With its interactive, flexible, and easy-to-use interface, the TRACCESS Dashboard provides Employees and managers with a comprehensive, visual look at their learning progression, instant access to important information, and an interactive interface that allows them to easily navigate through the TRACCESS system.

Wide Variety of Dashboard Items

The Dashboard can be made up of any combination of several items: Charts, My Job Summary, Qualification Summary, Quick Links, URLs, and TRACCESS News. The Dashboard can act as a bulletin board, a place for resources, and, most importantly, a jump-off point to navigate to crucial areas in the system.

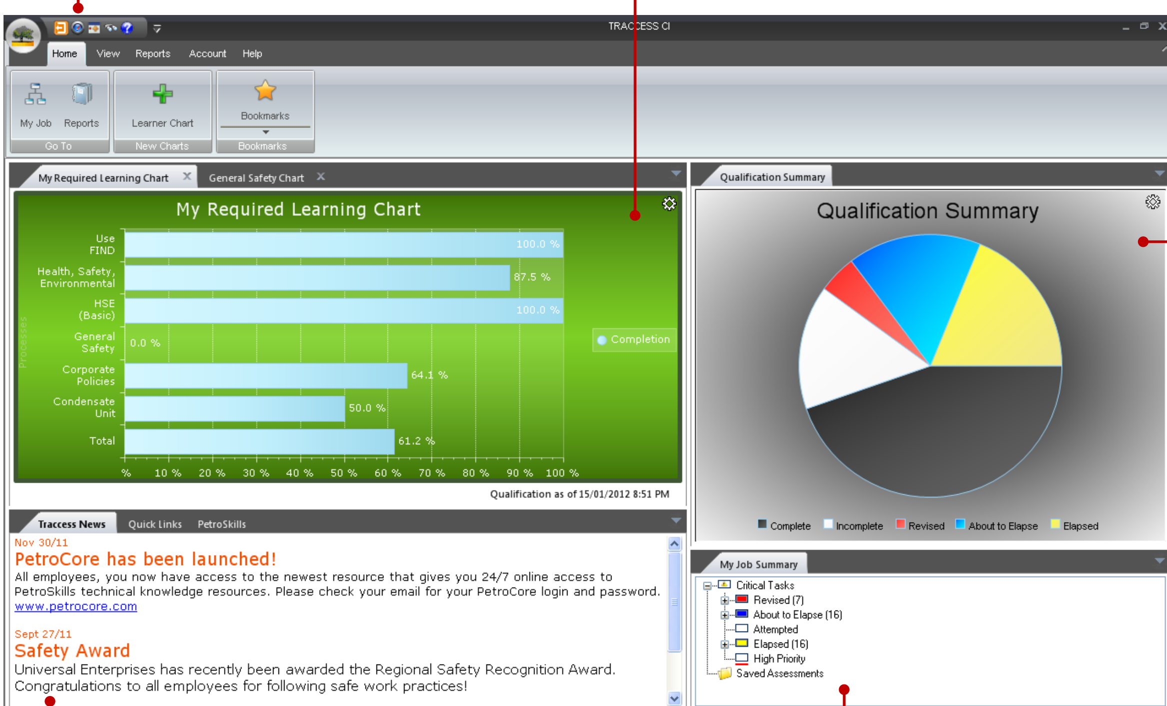
Fully Customizable Layout with Tear-Away Tabs

The new Dashboard has been integrated with tear-away tabs—giving the Dashboard a fully-flexible layout and allowing Learners and managers to customize their Dashboard to their own personal liking. Each tab can be dragged and dropped and repositioned almost anywhere on the Dashboard. You can also group tabs into one window. For example, you may want to group three charts into one window; each chart can then be viewed by clicking on its tab. Windows on your Dashboard can be resized as well, so you can make each window as large or as small as you want.

Below, you can see an example of just one way a Learner can customize his or her Dashboard:

The Dashboard icon, located on the Quick Access Bar, allows you to easily toggle between the Dashboard and TRACCESS Home.

Two charts tabbed into one window



Qualification Summary

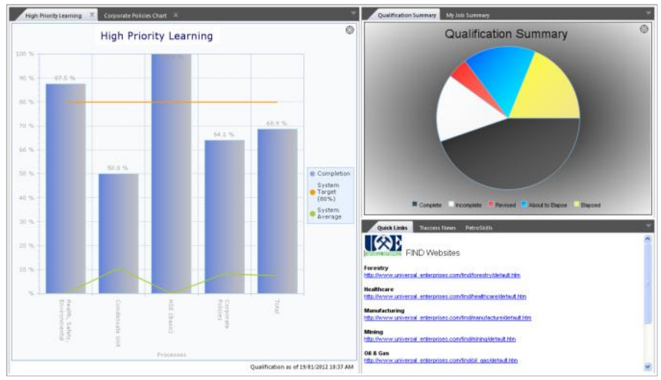
TRACCESS News, a URL, and Quick links tabbed into one window

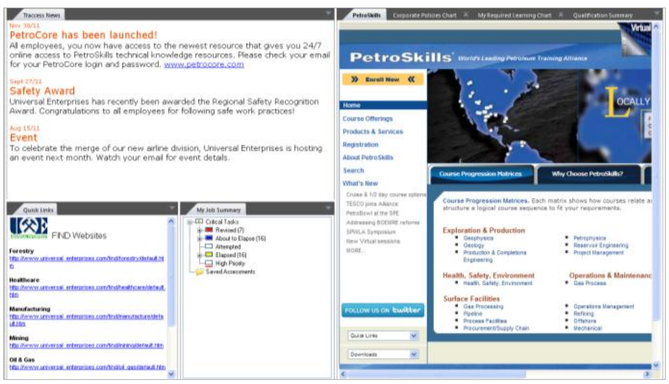
My Job Summary

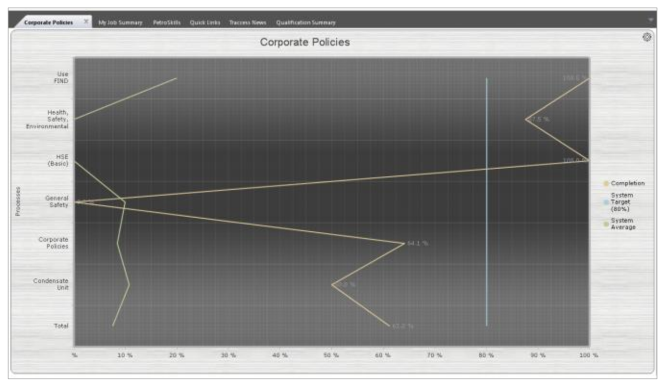
Items can be conveniently grouped together and accessed by clicking on their tabs:

Tabs allow you to easily group and quickly switch between items.

The flexibility of the Dashboard allows Learners and managers to cater their Dashboards to their own personal liking and needs. Below are just a few of the possible layouts:







Interactive Chart Data and Navigation

Information about learning progression or Employees can now be viewed on the Dashboard with drilldown charts. This allows you to interpret information in a richly-visual format. Learners can view, for example, a “My Job” chart, which will help them to easily identify weak or strong areas in their learning. Charts contain several layers of information, and each layer can be clicked on, or “drilled into,” to view data deeper in the chart. These charts can also serve as a navigation tool, as you can “jump to” a specific area in TRACCESS from the chart.

Interactive Charts

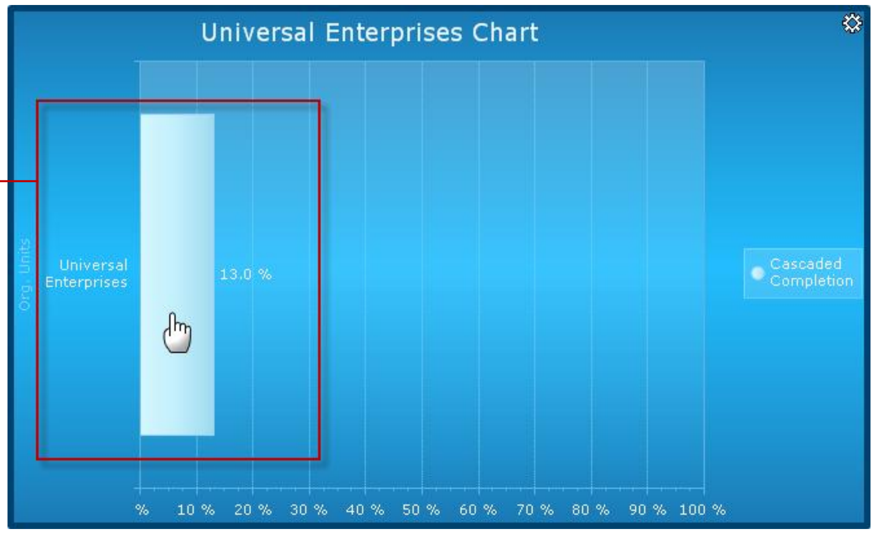
Viewing data about Employees and learning progression is now faster and more visual with interactive charts. Displayed on your TRACCESS Dashboard, these dynamic and richly-visual charts, also known as "drilldown charts," give both Learners and managers an immediate, overall view about their most relevant data.

Interactive Navigation

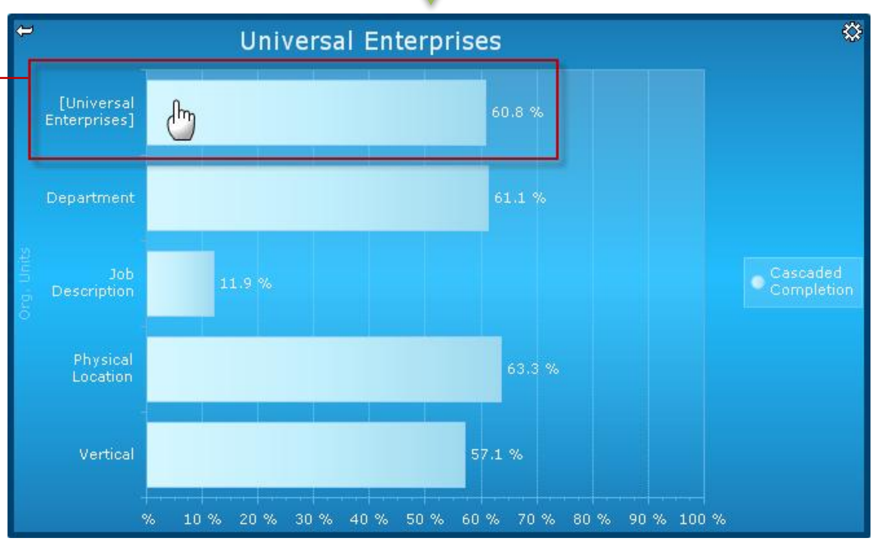
Drilldown charts are made up of many layers of data that are based on the hierarchy of a Learning or Employee tree. Using a drilldown chart is easy. With a few simple clicks, different layers of data can be viewed.

For example, the Supervisor chart below for the Universal Enterprises Org Unit is cascaded by Organization Unit, Process. You can see different data as this chart is drilled into from its root, the Universal Enterprises Org Unit, right up to all the Employees that belong to that Org Unit.

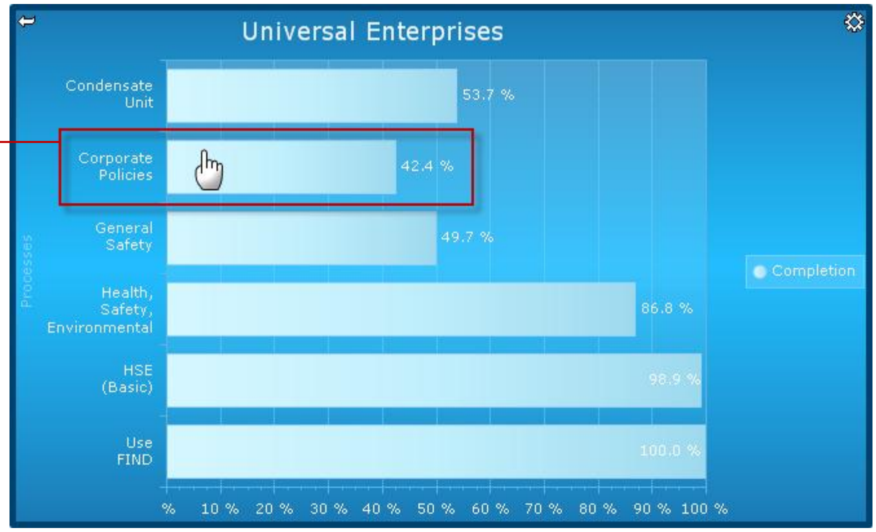
This is the overall competency for the entire company, Universal Enterprises. Clicking on the bar will "drill into" the information, showing the Organization Units that make up Universal Enterprises.



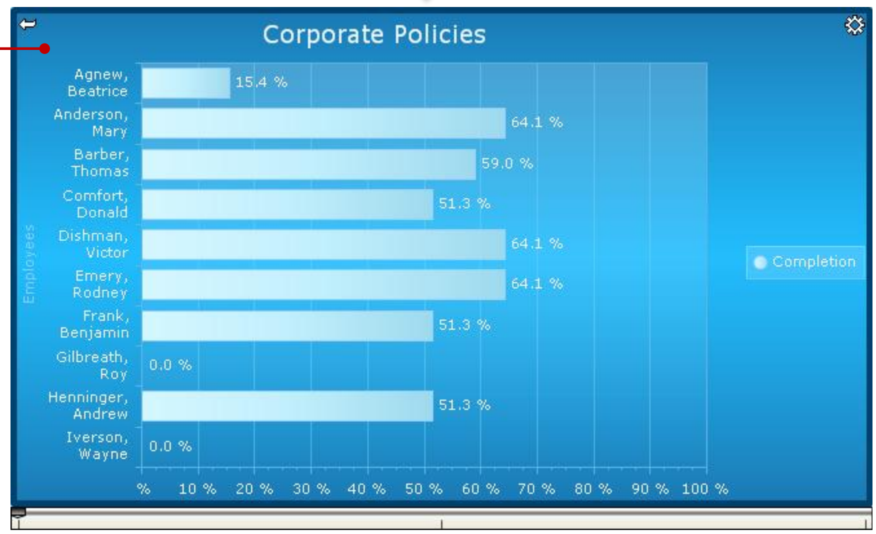
Within Universal Enterprises, there are several main Org Units.



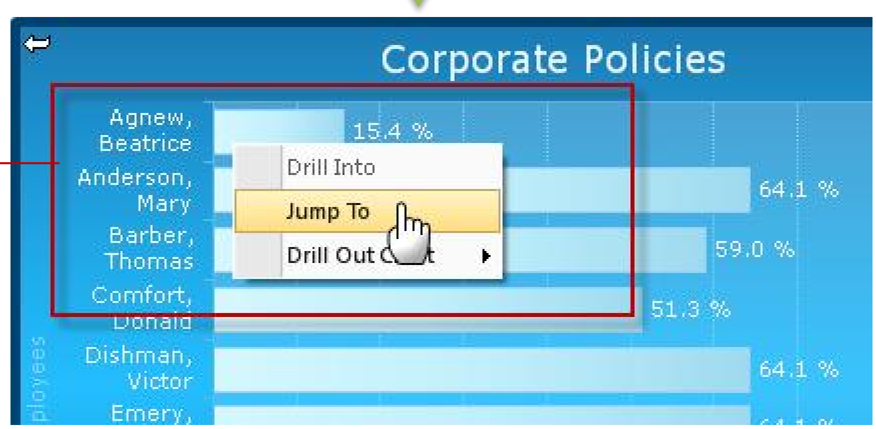
Once you drill into the Org Units, you can see the completion level of each Process assigned to that Org Unit.



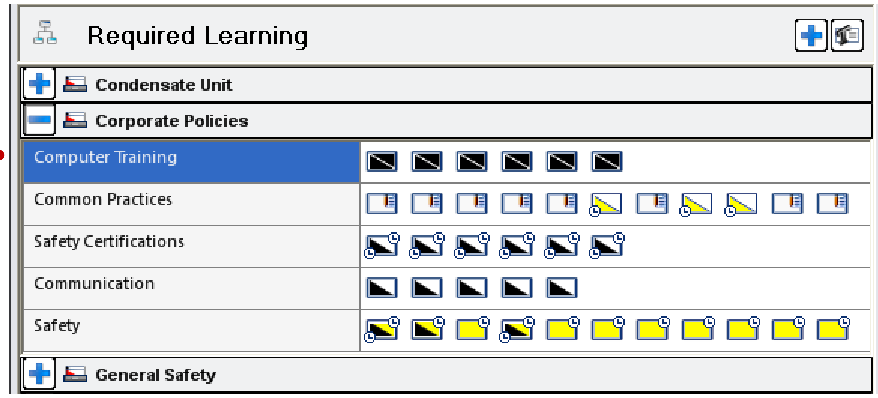
After you have drilled into a Process, you can see the progress of each Employee that belongs to this Org Unit.



When an area of interest is found, such as this Learner who has a completion of 15.4%, a simple right-click will allow you to "jump to" that area in TRACCESS.



Now you are taken to the TRACCESS view, where you can see the Employee's learning, already expanded for you.

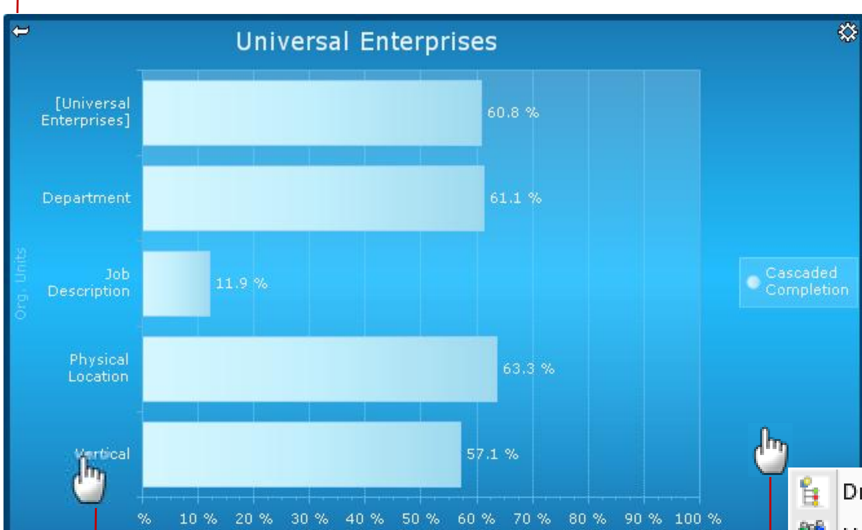


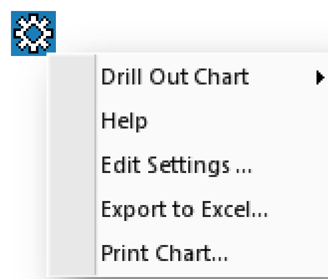
Easy-to-Use Chart Features

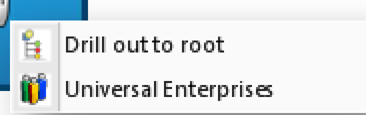
Drilling into the chart is done by simply clicking on an item in the chart—clicking on another item will allow you to drill deeper into the chart. Clicking on the Drill Out arrow allows you to quickly return to the previous level. The Gear button has options that allow you to drill out to the root of the chart and also to drill back to any level of the chart you've already drilled into. The right-click menu lets you drill out to any level, and it shows you how deep you are drilled in.

Quickly drill back one level with the arrow icon.

Quickly access chart settings and features with the gear menu.







Quickly drill into the chart by clicking on an item.

Quickly drill back to the chart root with the right-click menu.

Easily Identify Strong and Weak Areas

Drilldown charts help Learners to easily keep track of their learning. Instead of trying to find the Tasks they most need to work on, a chart a can give Learners an instant, visual overview. Supervisors benefit in a similar way, by helping to easily monitor the learning of the people they manage. They can then identify areas of interest such as Learners who are behind in their learning or find solutions to problematic Processes or Tasks.

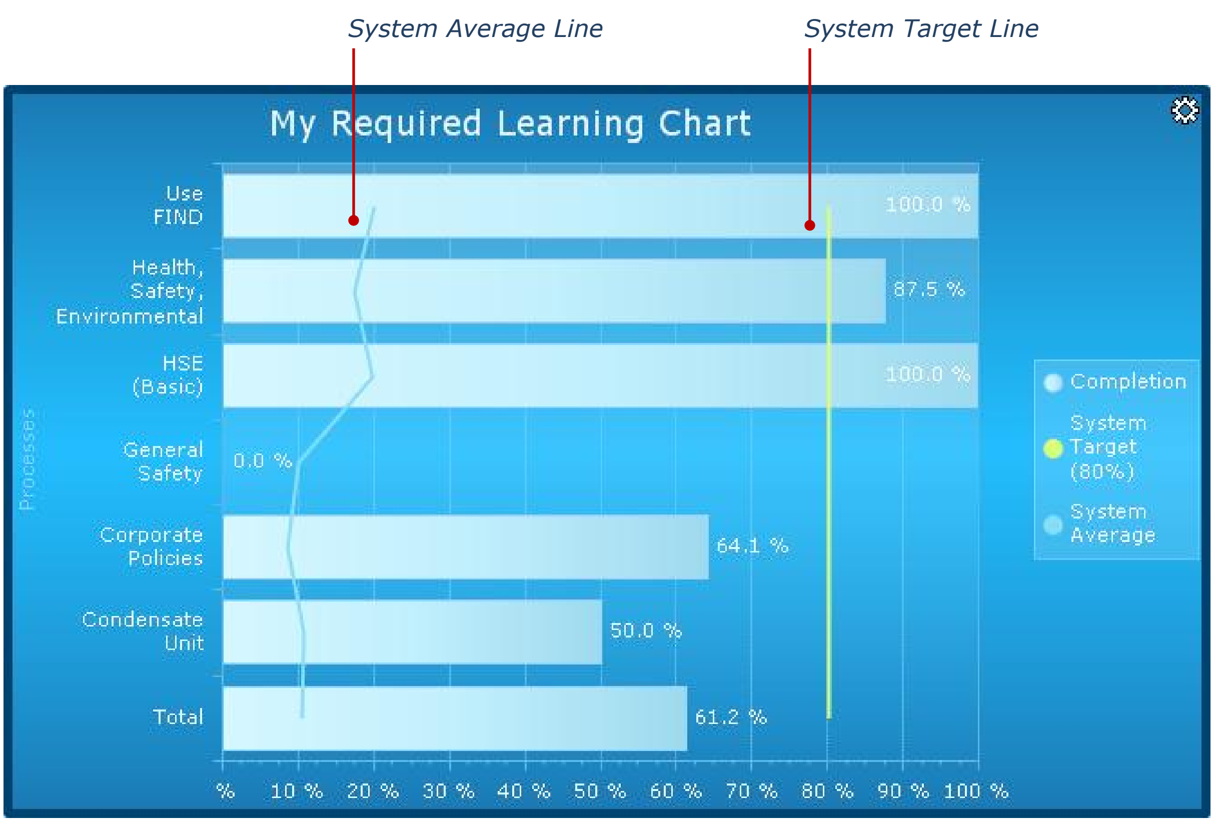
To help enhance the Learner and Supervisor charts is the System Target and System Average line.

- The System Average line shows the average completion for all Employees. This helps Learners see how they are doing in comparison to their peers, motivating both Learners and Supervisors and ensuring that nobody gets left behind.

- The System Target line indicates where a company expects Learners to be in their learning progression. This creates motivation for Learners, so they can see how their completion compares to other Employees in the system.

Companies can disable the System Target and/or the System Target line at a system-wide level if they do not wish to measure against them.

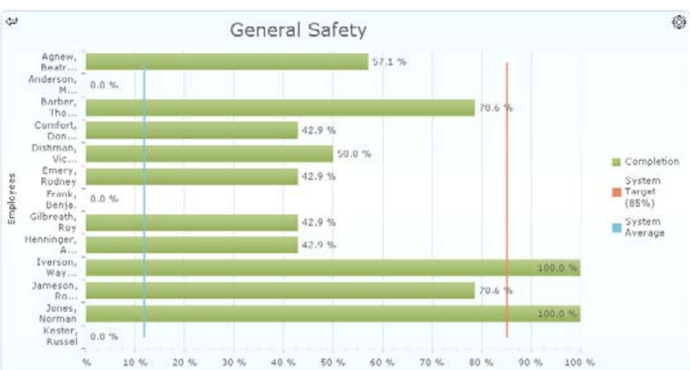
Below, you can see a chart that displays a Learner's Required Learning. The System Average line indicates that the Learner is surpassing his peers in all but one Process. The System Target line, set at 80% completion, lets this Learner know that he has only met his company's target in under half of his learning.

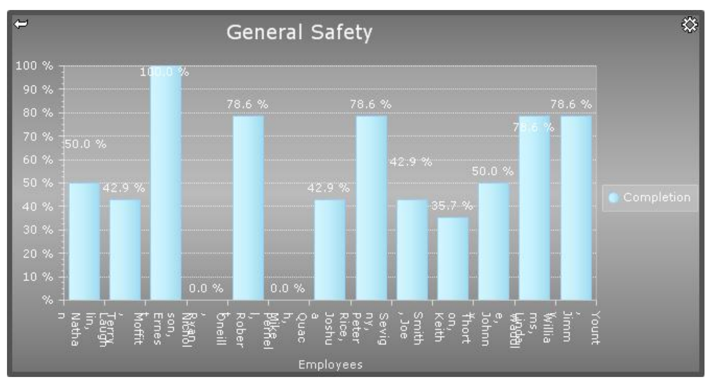


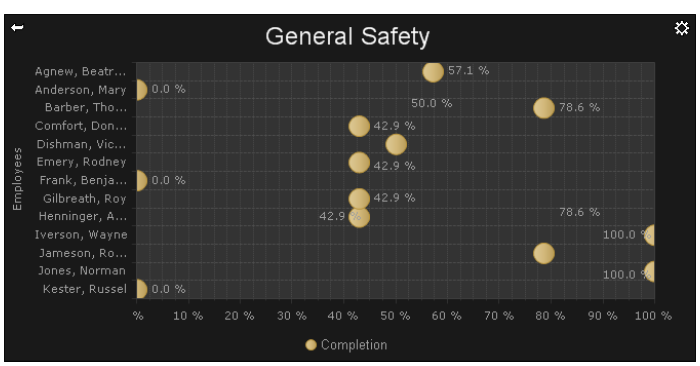
Fully Customizable

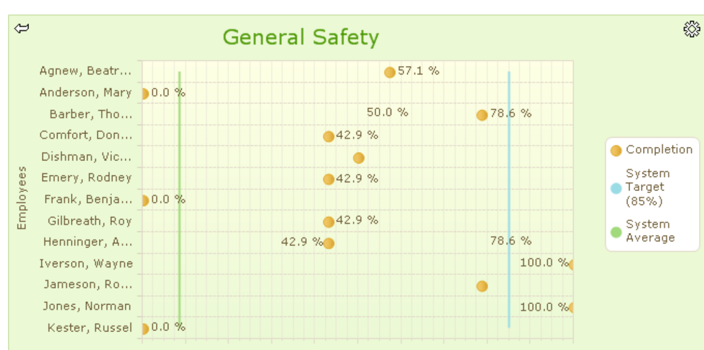
Charts can be customized in not only their looks, but also in what data they show, so you can cater your charts in a way that works best for you. Esthetically, you can choose from over 40 skins, a bar, bubble, line, or point type chart, and a horizontal or vertical orientation. Aside from the wide combination of styles to choose from, there are also 13 different chart types that define how the chart data is sorted, grouped, navigated, and totalled.

Below you can see how the same chart can be customized in many different ways:









Customizable Excel Template for Reporting

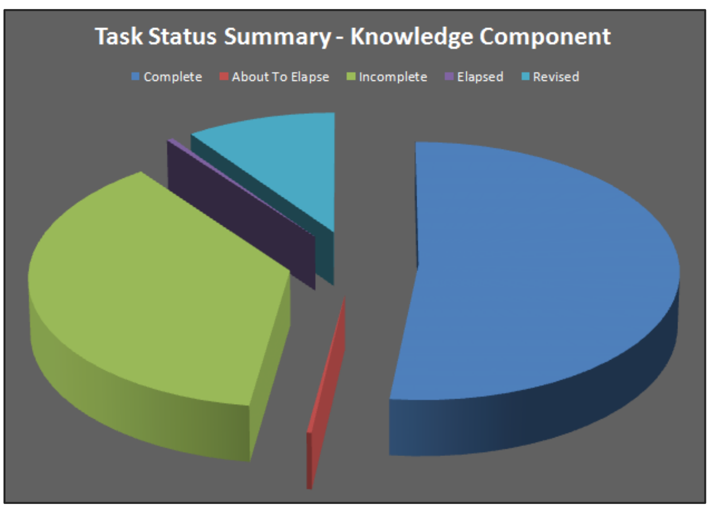
There is more flexibility in the customization of reports with the Customizable Excel Template feature. You now have the ability to upload your own custom, pre-configured templates from your desktop to TRACCESS. The templates are then populated with the chosen report data. You can then open the file in Excel, which will allow you to manipulate the report data. You could, for example, view your data in multiple chart styles and colors. Essentially, this feature allows you to customize report data in whatever way suites your organization the best.

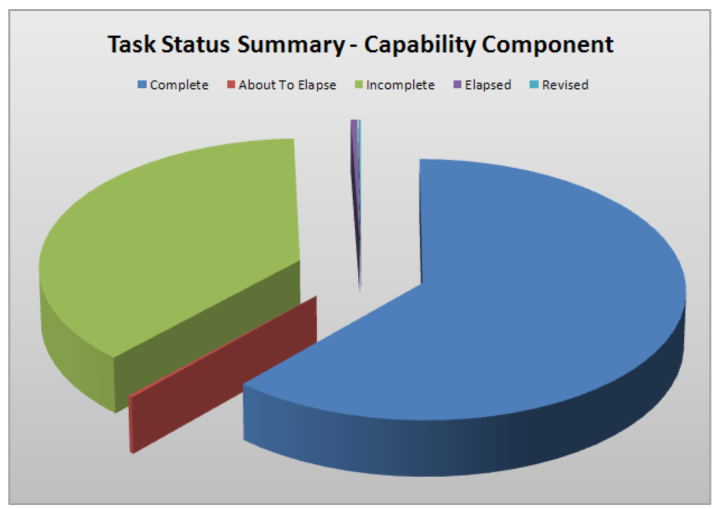
How It Works

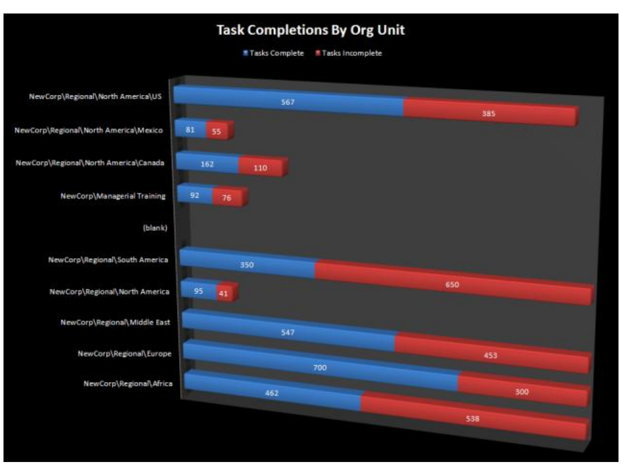
By default, TRACCESS CI 9.1 will come with a new Excel Qualification-style report. This report is an Excel spreadsheet that can present TRACCESS qualification data in several different charts on different sheets within the workbook. If you want to create your own chart or pivot table within this workbook, you can do so simply by using Excel.

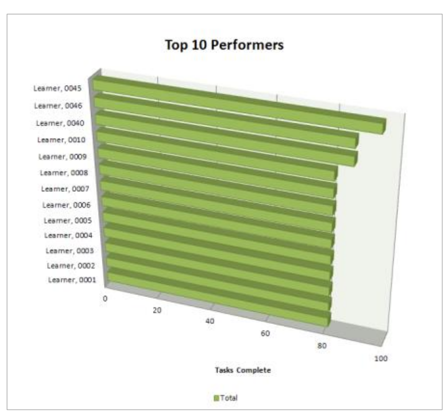
Once you have made the additions or modifications to the Excel file, you can upload that file and either overwrite the existing report file or create a new report with your new Excel sheet. When this new report is used, the reporter is able to use the standard TRACCESS wizards to select all the people, Org Units, learning, and options for the report, but it will be generated directly into the Excel spreadsheet that you created.

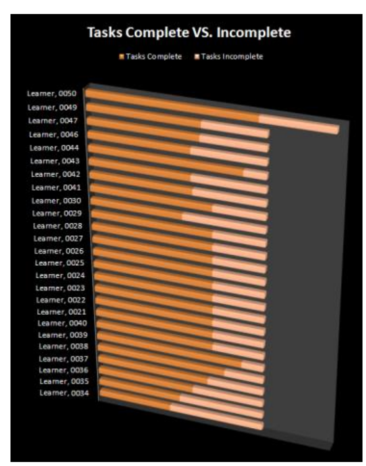
This turns your Excel users into report writers. You will be able to present your TRACCESS data in any way that works best for your company. Or, if you have a specific Excel-based layout that you are interested in but do not know how to create, you can have us build one for you.











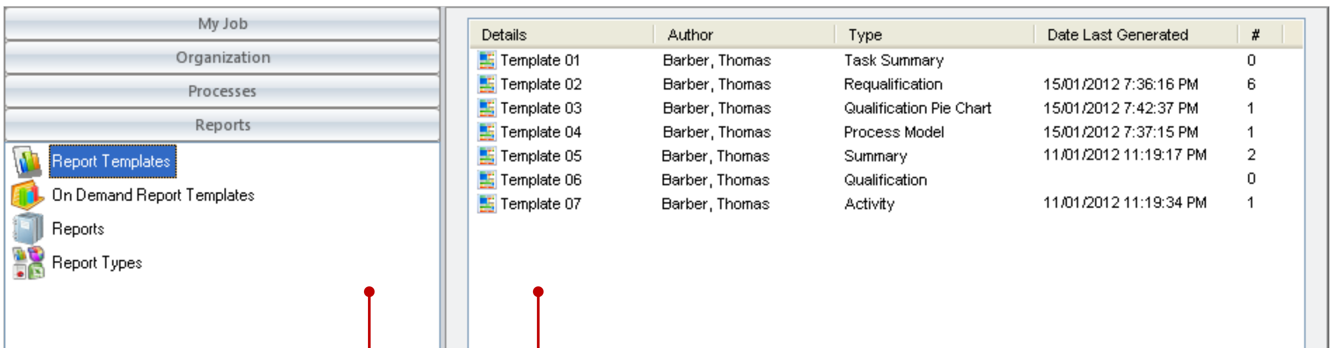
Completely Reorganized Report Manager

The Reports manager has been completely reorganized into four simple and easy-to-use sections:

- Report Templates
- Reports (generated)
- Report Types
- A totally new feature called On Demand Report Templates

Each section is designed to keep your reporting items well-organized and easy-to-find.

You can see that when Report Templates is selected, all the templates appear in the context view, conveniently grouped together in one place.



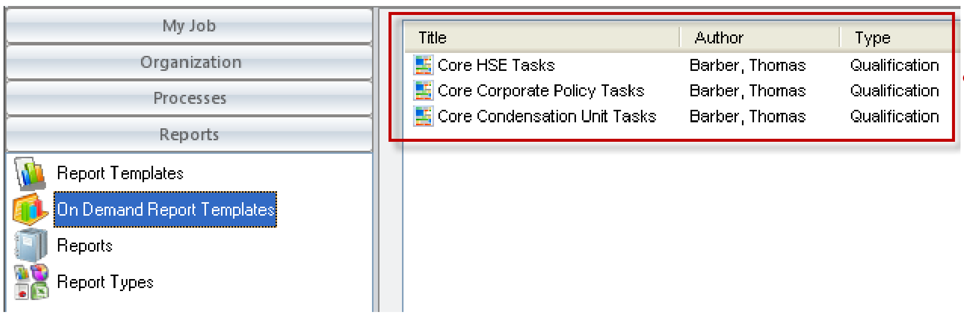
When Report Templates is selected in the manager, all templates are listed and conveniently grouped together.

On Demand Reports

Reporting on qualification is a vital part of understanding your Employees' progression in the TRACCESS system. Now, with On Demand Reports, you have the option of quickly running reports directly from the Organization manager.

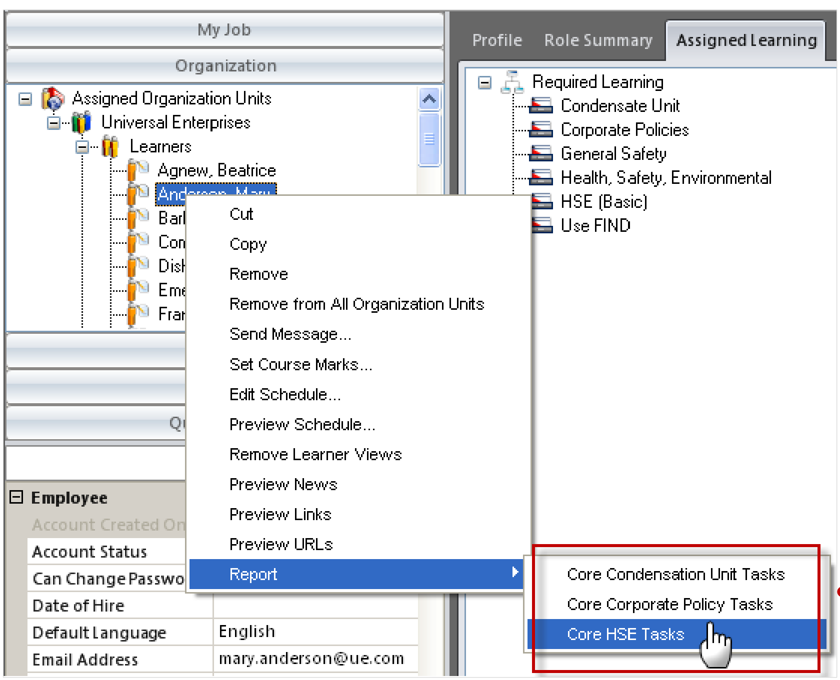
Previously, to run a report you would have to go into the Reports manager, create a new template, choose the learning and people to report on, and wait for the report to generate. If you wanted to change the Org Units or the Employees you were reporting on, you'd have to edit the template and wait for the report to generate every time you wanted to make changes. Now, with On Demand Reports, this process is a whole lot easier.

For example, if your company labelled certain Tasks as "Core" and often reported on these Tasks, you can simply setup your templates in the Reports manager in the On Demand Report Templates section. In the example below, you can see that three templates for "Core" Tasks have been setup.



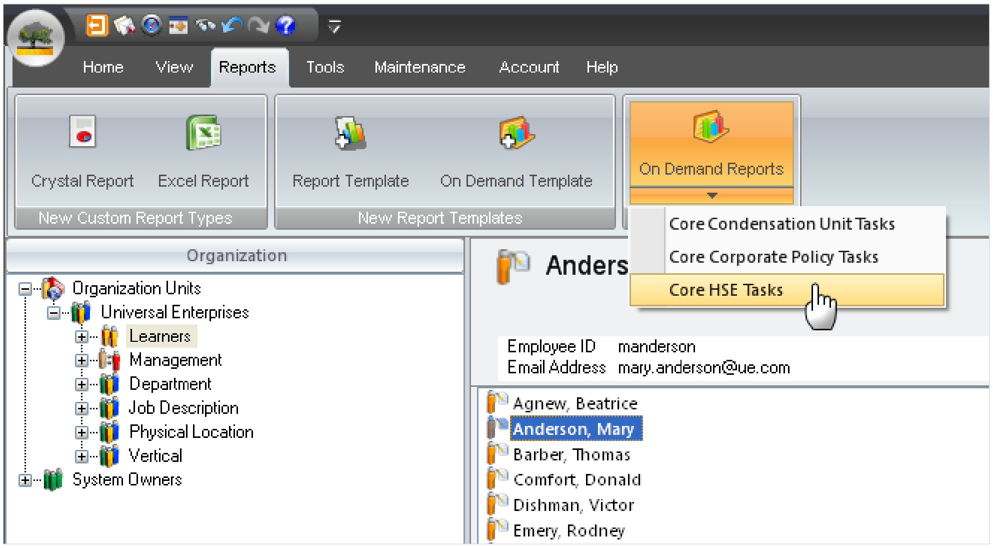
Create On Demand report templates

Now, these reports are available from the Organization manager, and you can simply right-click on an Org Unit or Employee and choose which On Demand report to generate. Below you can see that the *Core HSE Tasks* report is being run on a Learner in the Universal Enterprises Org Unit.

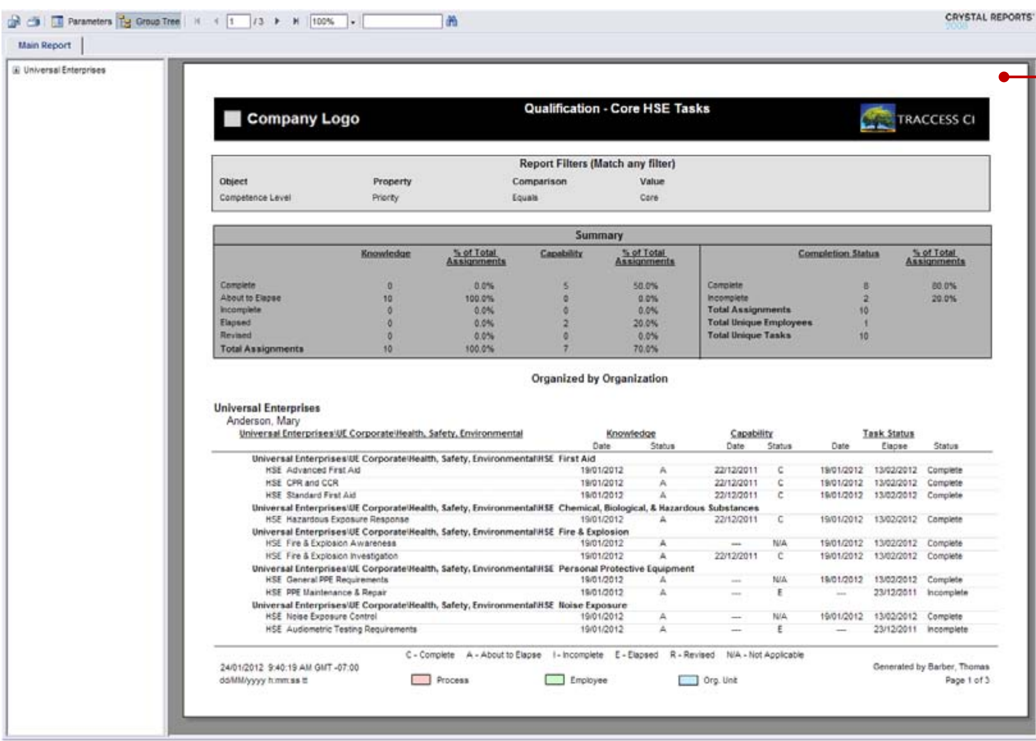


Report on Org Units or Employees from the Organization Manager

You can accomplish the same thing by selecting the Learner in the context view and then selecting the On Demand Report from the Ribbon:



The report processes immediately and appears as soon as it is generated. You can discard, save or print this data.



Immediately view your report

Question Bank

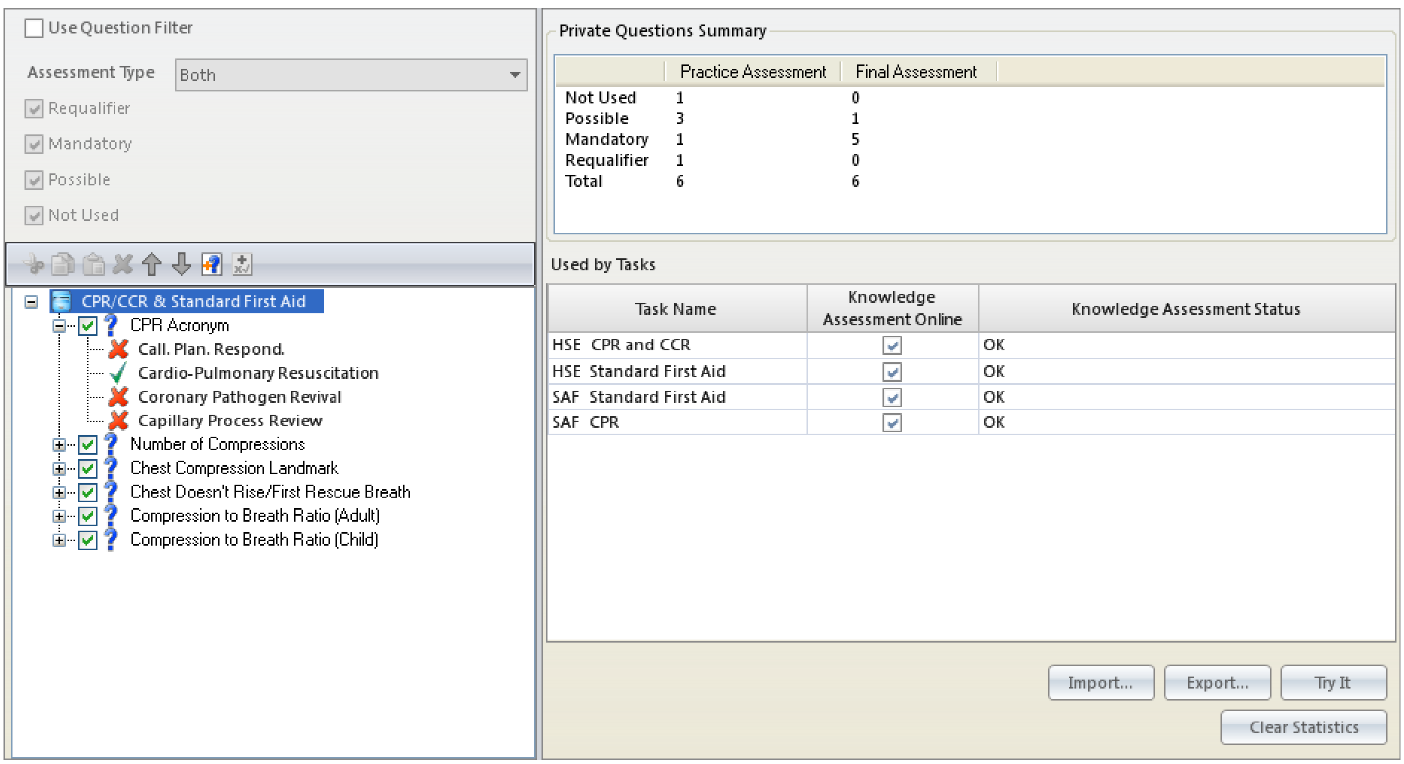
Knowledge Assessment questions can be easily managed all in one place with the new Question Bank feature. This brand new area in TRACCESS allows you to create, contain, and reuse questions in any number of Knowledge Assessments. You can still manage your questions directly on the Task if you wish, but the Question Bank now gives you a second option for questions that may be reusable.

The Question Bank can be used to serve many purposes. For example, if your company uses the same question in 100 tests, you would simply create the question in the Question Bank and add it to each Knowledge Assessment. This eliminates the need to create the question 100 times, since it is always available in the Question Bank. This is particularly common when customers use an attestation style of question such as "I have read and understood the attached policy." In a case like this, you may have the exact same question on many Tasks. Now you can manage that single question in one place and changes to the question will automatically cascade to all the tests using it.

The Question Bank can not only be used to reuse questions, but it can also be a means to add supplemental questions to existing tests. The Question Bank can even act as a central place for managing all tests.

Also, the Question Bank is especially valuable, since you will never lose any of the questions you create within the Question Bank. Even if you delete Tasks with Knowledge Assessments, the questions are kept safe in the Question Bank for reuse.

Ultimately, whichever way you decide to use it, the Question Bank is intended to save you time and make the creation of Knowledge Assessments an easier process.



Improved “About to Elapse” Indication for Tasks

The About to Elapse Task icon has been changed to blue. Previously a Task that was about to elapse was indicated by a small clock in the corner of the icon that turned red; however, red is also used on the Task icon itself to reflect that a Task has been revised. This color change makes the About to Elapse status consistent with the colors used in the Qualification Summary Pie Chart that appears on the TRACCESS Dashboard. With this latest change, all possible Task statuses are indicated by different colors, and those colors are also represented on the TRACCESS Qualification Summary Pie Chart. See the table below as a review of all the possible Task statuses.

The clock on the corner of the Task icon has also changed—it is no longer used to indicate a state for the Task. It is now only needed to indicate whether or not the Task has a duration. This makes the Task statuses simpler to teach to new users. There are 5 possible colors, and Task components either have a duration or not, based on whether a clock is shown on the corner of the Task icon.

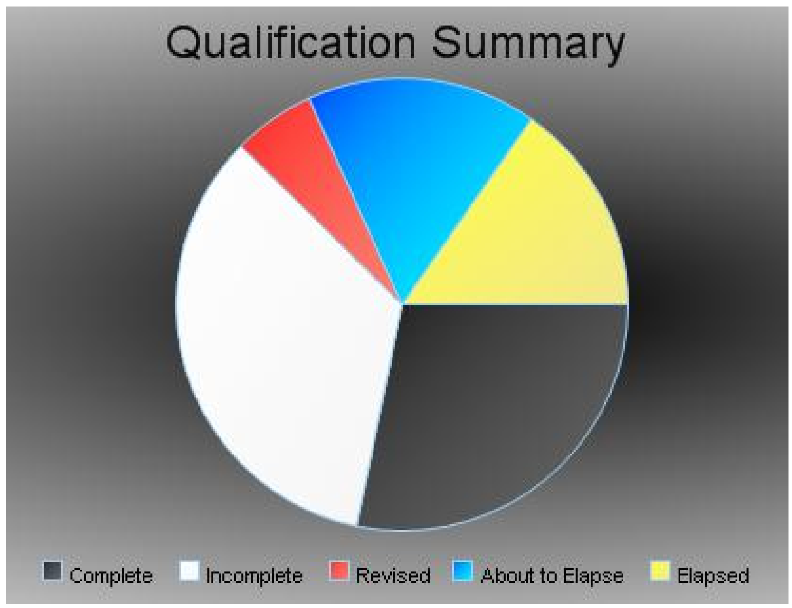
Complete

Incomplete

Revised

About to Elapse

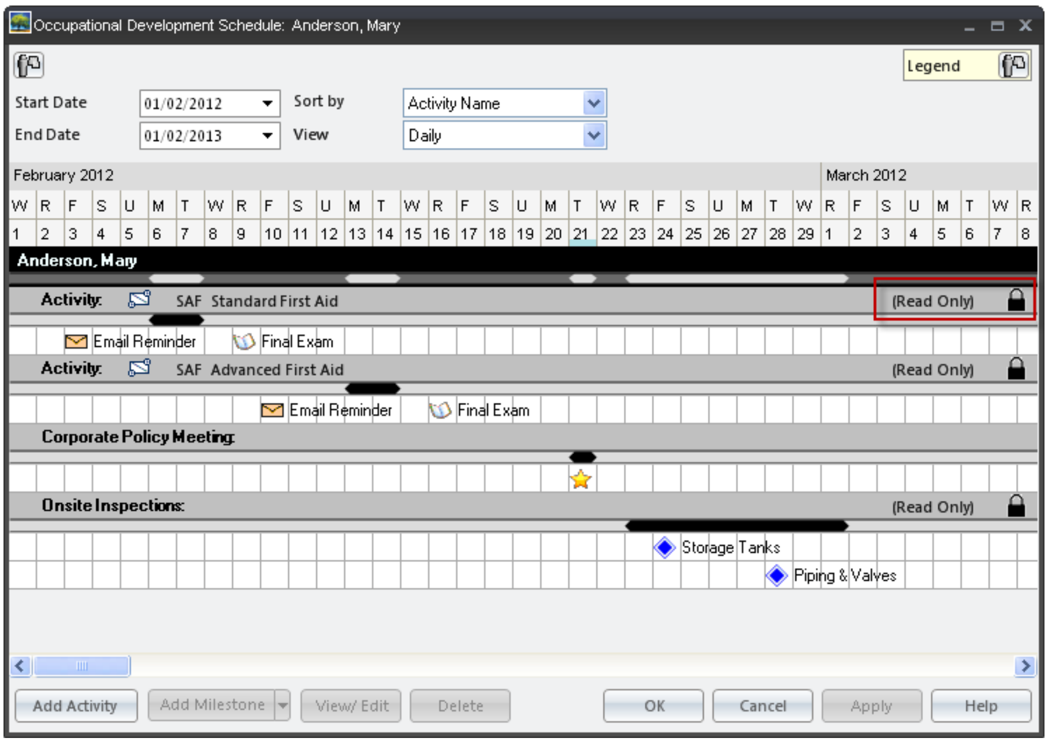
Elapsed



Schedule for Organization Units

Supervising your Employees involves ensuring that all Learners are consistently informed of important activities. Now, instead of adding activities to Learner schedules one-by-one, Supervisors can use the Schedule for Organization Units to add activities to all the schedules of all the people belonging to an Org Unit all at once.

This new and efficient way of scheduling can be especially useful in situations when everyone in an Org Unit needs to be informed of mandatory or strongly suggested activities, such as onsite inspections, courses, or seminars. Just as in a Learner schedule, Supervisors can also setup milestones and email reminders, which is an effective way of notifying and reminding a large number of people of the activities that have been scheduled for them.



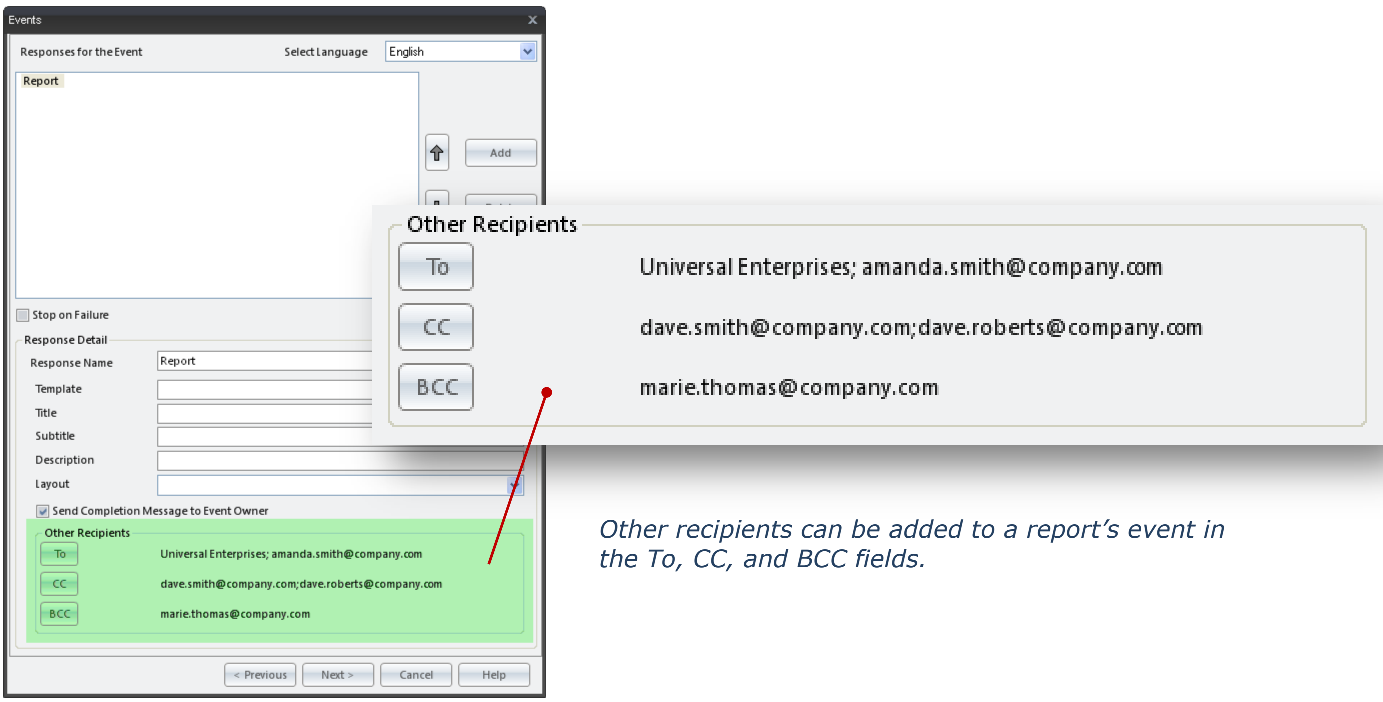
Org Unit activities appear as read-only in Learner schedules.

Previewing an Org Unit schedule also allows Supervisors to see what blocks of time are free or available for the people who report to them. And when adding activities to a schedule, Supervisors now have the option of having an Outlook meeting request sent to the Employee, so that the meeting will also appear in their Outlook calendars.

External Recipients for a TRACCESS Report

Reports created in TRACCESS often need to be shared with people who do not have a TRACCESS account or who rarely use the system.

External email addresses can now be added to a Report Event. When the report has been generated, the event will send a completion message and the attached report to all recipients, including to the indicated email addresses.



Other recipients can be added to a report's event in the To, CC, and BCC fields.

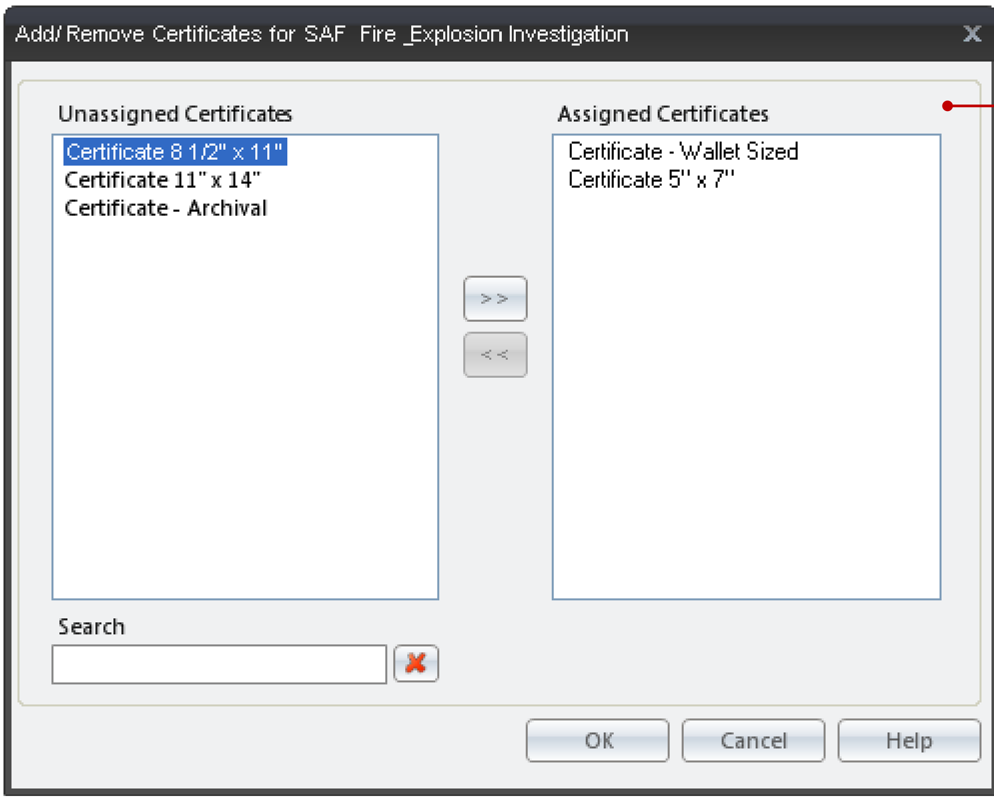
This feature has also been added to the New Message dialog. This eliminates the need to use an external program to include non-TRACCESS recipients in a message sent through TRACCESS.

Multiple Templates for Task Certificates

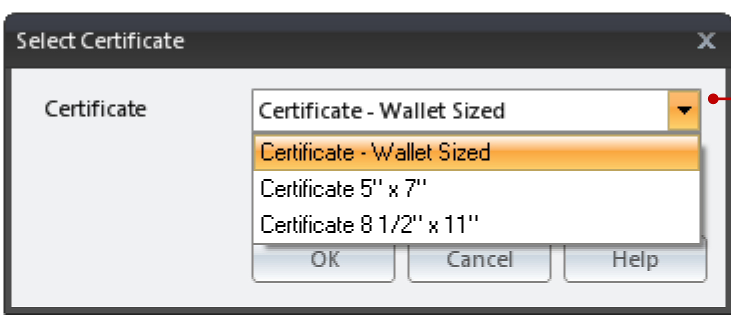
Not all Tasks are the same, and Tasks may have different reasons for needing a certificate. Subject Matter Experts now have the flexibility of providing Learners with certificate layouts specifically designed for a Task.

System Owners can add multiple certificate templates to the system. SMEs can then assign these templates to different Tasks. This is especially useful in cases such as different parts of a company having different needs for certificates—each can have their own layouts in the system. Tasks can also be assigned more than one layout, giving Learners multiple options to choose from when they print a certificate of completion.

With certificates now having this new flexibility, this provides the option of different designs, styles, and sizes; furthermore, templates can be catered to serve almost any purpose, such as for display, archival, or wallet-sized certification.



Once certificates have been added to the system, an SME can assign particular templates to a Task.

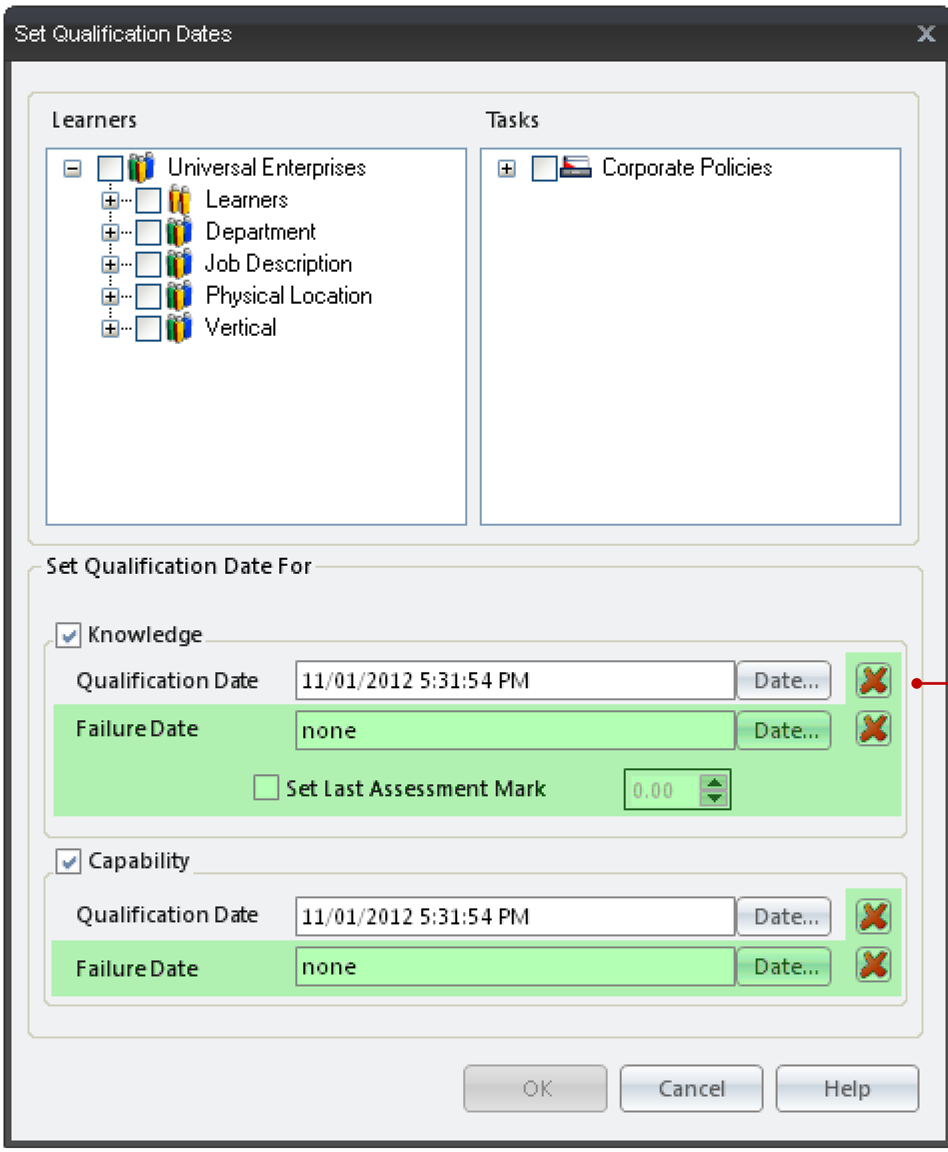


Learners may have one or more layouts to choose from.

Set Knowledge Assessment Marks

Additional settings have been added to the Set Qualification Dates dialog, so that managers can easily set Knowledge Assessment marks manually for multiple people all in one place. This is useful when tests have been taken offline and need to be manually entered or when a Supervisor needs to enter historical testing data that includes marks.

In addition to the Qualification Date field, a Failure Date field, and an Assessment Mark box have been added. To make things even easier, there is now a Clear Date button beside the Qualification and Failure Date fields. Managers no longer have to first go into the Date dialog to clear a date.



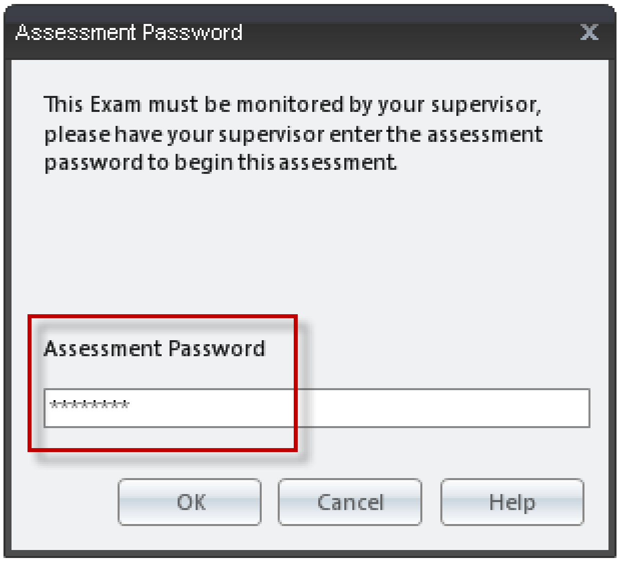
Managers can easily set qualification and failure dates, clear dates, and set assessment marks all in one place.

Password Protected Knowledge Assessments

Now you can be assured that a Learner doesn't begin an assessment without supervision. With the new Password Protected Knowledge Assessments feature, Subject Matter Experts can now restrict access to a Knowledge Assessment through the use of a password. The password can then be shared with either a Learner's Supervisor or a proctor who is going to oversee the exam.

This type of security is especially useful when it is mandatory for a Learner to be supervised while taking a Knowledge Assessment. For example, in cases when a Learner is taking a final exam, it is crucial that the Learner does not begin the test unsupervised.

The password prevents Learners from beginning tests ahead of time—they can only begin once the supervisor enters the password for them or provides it to them. This is common when Learners may be required to take the exam in the presence of a monitor.



The assessment password ensures that Learners do not begin the exam ahead of time.

Card-Sized Competencies List

Proof that an employee is qualified to perform a task can now be carried with them anywhere they go with the Card-Sized Competencies List report.

Available in two sizes, this report is convenient enough to be kept in an employee's wallet, lanyard, or pocket—perfect for carrying around with them on job sites, where it is crucial that a person is certified and capable of completing particular tasks. The card displays the employee's name, the Task name, the Revalidation date, the Task status, and the current date. This card acts as an easy reference, to keep a constant watch on qualification, which helps to ensure safety in any work environment.

This report is specifically formatted to print on perforated card-size paper available at any office supplies store.

Business Card Size
2 x 3.5

Anderson,Mary — Qualifications Card — Jan 24, 2012

Task Name	Revalidate	Status
HSE Advanced First Aid	Dec 21, 2014	C
HSE Audiometric Testing Requirements	Elapsed	E
HSE Fire & Explosion Awareness	Annually	C
HSE Fire & Explosion Investigation	Dec 21, 2014	C
HSE General PPE Requirements	Elapsed	E
HSE Hazardous Exposure Response	Dec 21, 2014	C
HSE Hazardous Storage Requirements	Annually	C
HSE Noise Exposure Control	Elapsed	E
HSE PPE Maintenance & Repair	Elapsed	E
HSE Standard First Aid	Dec 21, 2014	C

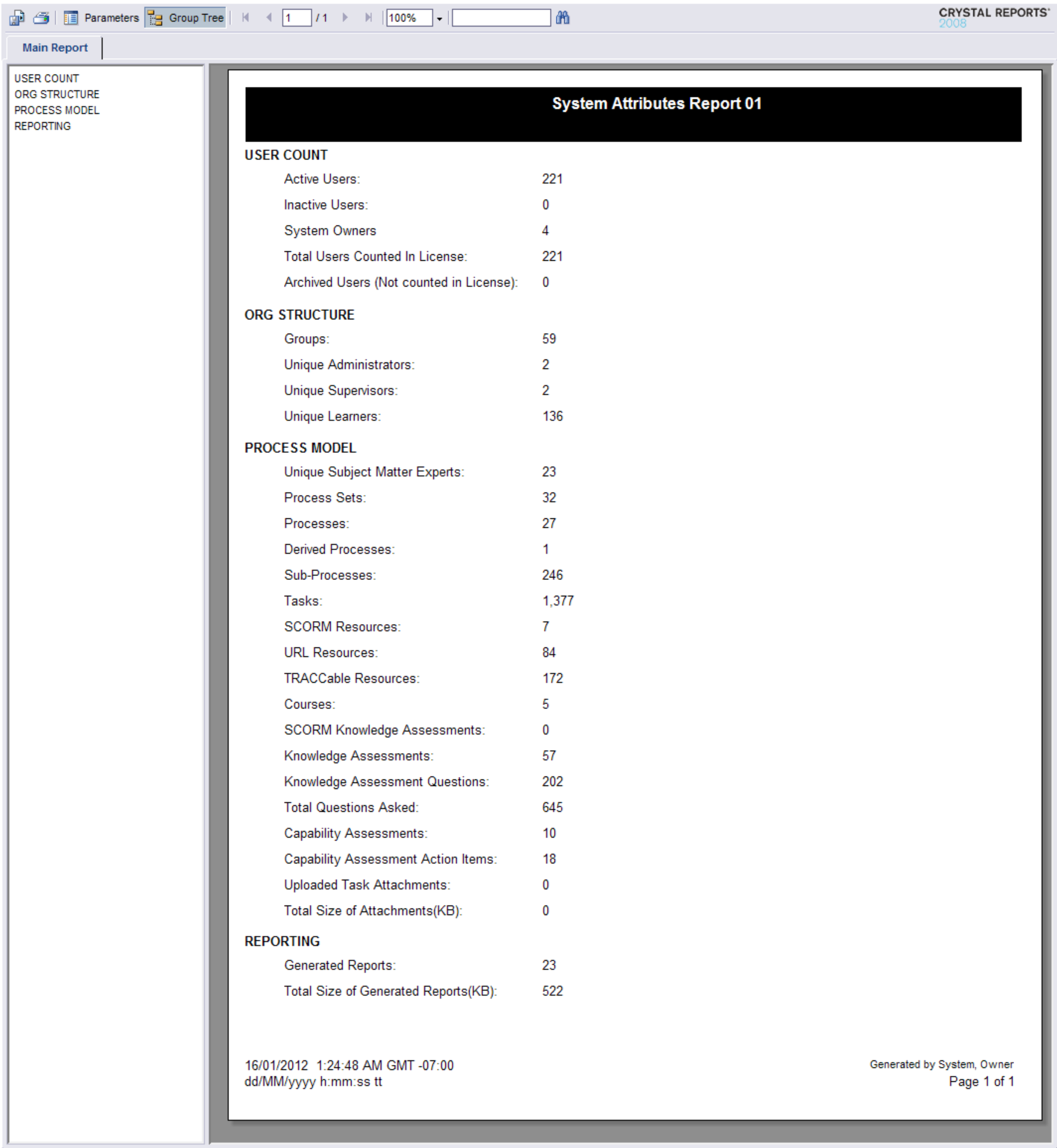
Large Card Size
5 x 7

Kester,Russel — Qualifications Card — Jan 16, 2012

Task Name	Valid Until	Status
COR Asbestos Hazards in Buildings	Dec 21, 2014	C
COR Building Safety	Never Elapses	C
COR Eyewash Station	Dec 21, 2014	C
COR Introduction to PCs	Never Elapses	C
COR Microsoft Access	Never Elapses	C
COR Microsoft Excel	Never Elapses	C
COR Microsoft Outlook	Never Elapses	C
COR Microsoft PowerPoint	Never Elapses	C
COR Microsoft Word	Never Elapses	C
COR New Employee Orientation	Elapsed	E
COR Safe Driving	Elapsed	E
COR Supervisor Training	Elapsed	E
HSE Advanced First Aid	Dec 21, 2014	C
HSE Audiometric Testing Requirements	Elapsed	E
HSE Confined Space Awareness	Never Elapses	C
HSE Confined Space Entry	Dec 21, 2014	C
HSE Confined Space Rescue	Dec 21, 2014	C

System Attributes Report

The new System Attributes report gives you a better understanding of how your system is growing and changing. This report shows key values, including the number of spaces that are available in a license, the number of users in the Org Units structure, and a breakdown of numbers for the process model, including Unique SMEs, Process Sets, and Tasks. This is an excellent report to use periodically to get an overall idea of the growth or changes in your system.



System Attributes Report 01

USER COUNT

Active Users:	221
Inactive Users:	0
System Owners	4
Total Users Counted In License:	221
Archived Users (Not counted in License):	0

ORG STRUCTURE

Groups:	59
Unique Administrators:	2
Unique Supervisors:	2
Unique Learners:	136

PROCESS MODEL

Unique Subject Matter Experts:	23
Process Sets:	32
Processes:	27
Derived Processes:	1
Sub-Processes:	246
Tasks:	1,377
SCORM Resources:	7
URL Resources:	84
TRACCable Resources:	172
Courses:	5
SCORM Knowledge Assessments:	0
Knowledge Assessments:	57
Knowledge Assessment Questions:	202
Total Questions Asked:	645
Capability Assessments:	10
Capability Assessment Action Items:	18
Uploaded Task Attachments:	0
Total Size of Attachments(KB):	0

REPORTING

Generated Reports:	23
Total Size of Generated Reports(KB):	522

16/01/2012 1:24:48 AM GMT -07:00
dd/MM/yyyy h:mm:ss tt

Generated by System, Owner
Page 1 of 1

Import Enhancements

These exciting and new import enhancements have made TRACCESS even faster and easier to use.

Import Proof Documents
An attachment can now be included when importing learning record files. The attachment can be any type of file that is associated with an Employee's learning records. This file could be a PDF or scanned copy of a certificate or a paper Knowledge Assessment, for example. It could also be a signed-off Capability Assessment form completed by a Capability Assessor.

Import Employee Photos
Photos can now be uploaded to the TRACCESS system with Employee import files. This new enhancement can save a lot of time, so that many photos can be automatically added to Employee profiles instead of having to add each one manually.

Use MS Word to Write Tests for Import
Tests can now be authored in Microsoft Word. This offers many benefits, such as using advanced characters (not supported in applications like Notepad), including images, and applying all kinds of formatting, such as different styles of fonts. Once completed in MS Word, the test can be saved as a Rich Text file and imported into TRACCESS as a test.

Below you can see a test question that was formatted in MS Word, ready to be imported into TRACCESS.