



Login, Dashboard, and Tools

TRACCESS CI (the Competency Intelligence system) helps you efficiently manage your learning to meet and maintain the competencies set by your company. This Quick Reference Guide describes the CI login process, the main features of the Dashboard and the Quick Access Bar, and ways to tailor the Dashboard to your preferences.

Logging In

Your Supervisor or Administrator will provide you with a web address or internal web portal link to navigate to the TRACCESS login screen.

To log in:

1. Type your user ID into the **Employee ID** field.
2. Type your password into the **Password** field.
3. Click the **Enter** button.
4. (Optional) Use the dropdown menu to choose an alternative if the appropriate language does not appear by default.

Employee ID:

Password:

[Forgot your password?](#)

English

Version 9.1.3.344

If all fields were typed in correctly, you will now be logged in and ready to navigate the TRACCESS system.

Tip: If your company decided to use a single sign on process, you will not need a password to log in.

Dashboard

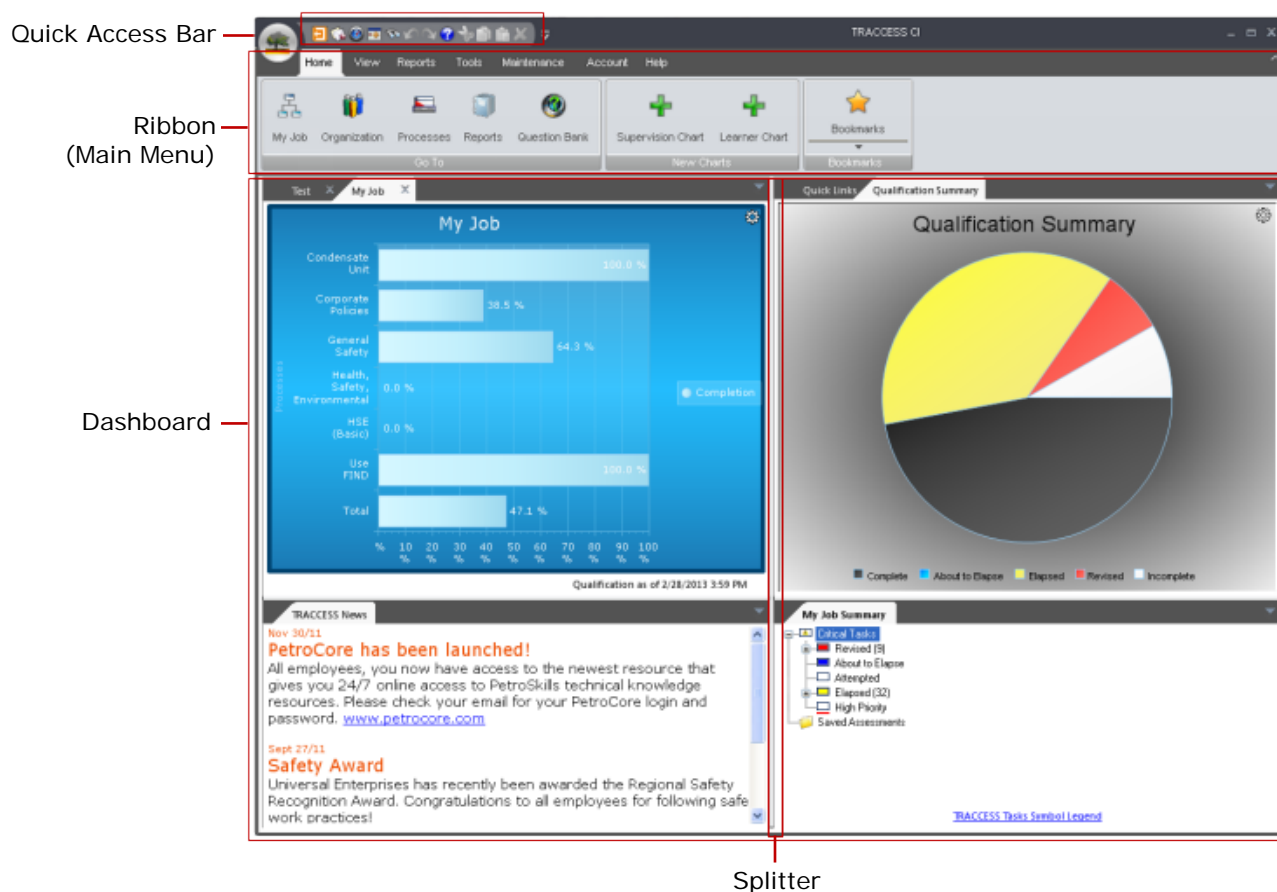
Typically, when you log into TRACCESS, you will first see the TRACCESS Dashboard or the TRACCESS Home. You toggle (switch) between these two screens using the Dashboard/Home icon on the Quick Access Bar.





The Dashboard interface is generally the same for all TRACCESS roles (Learner, Supervisor, Operational Administrator, etc.). The role simply changes some of the functions and options that are available. On the Dashboard/Home view, you will always see the Quick Access Bar and the Ribbon that let you easily find and access the main TRACCESS functions.

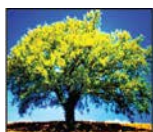
Your initial Dashboard may look like the sample below, but the Dashboard is very flexible. You can rearrange windows, collapse windows so only their tab shows, or add more windows to the Dashboard. You will find tips to help you tailor your Dashboard at the end of this Quick Reference Guide.



Quick Access Bar: A customizable bar made up of icons that allow you to quickly access commonly-used functions

Ribbon (Main Menu): Area where you access TRACCESS functions, that are grouped under tabs and displayed as icon-based buttons. As you select different items in TRACCESS, the Ribbon displays the item's relevant functions.

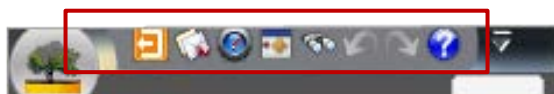
Dashboard: The Dashboard can be made up of any combination of items. It acts as a bulletin board, a place for resources, and, most importantly, a jump-off point to navigate to crucial areas in the system.



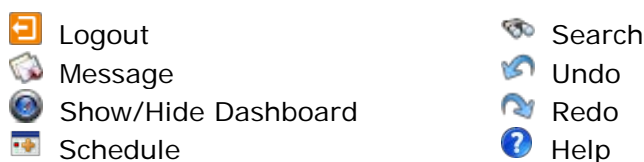
Splitter: You can click and drag splitters to resize the different sections of the TRACCESS Dashboard to your information needs and visual preferences.

Quick Access Bar

You can click on a series of icons at the top of the TRACCESS CI window to access commonly-used functions.

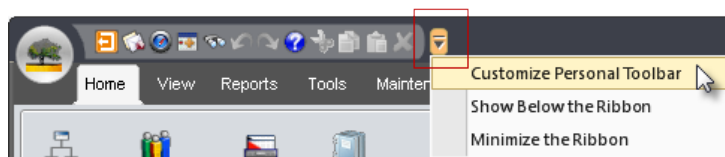


The standard Quick Access Bar includes:

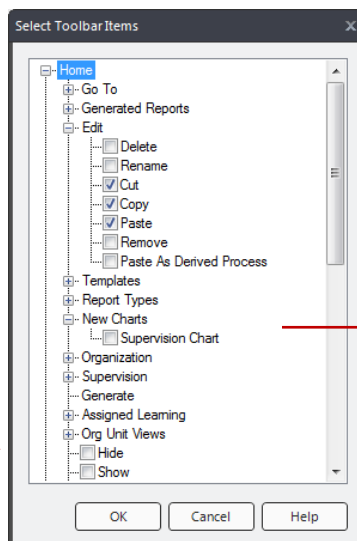
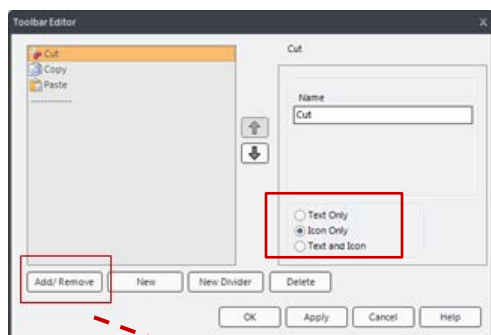


Tip: The icons you see in the Quick Access Bar may differ depending on your role in the system.

You can add icons to the Quick Access Bar to create a customized toolbar. To do this, click on the icon at the end of the Quick Access Bar, then click **Customize Personal Toolbar**.



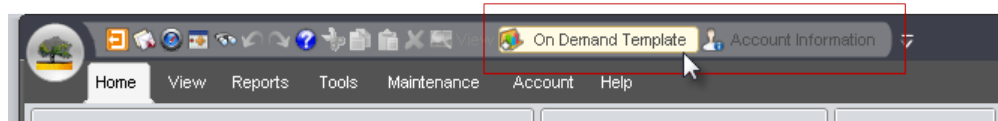
A Toolbar Editor dialog box appears. Click **Add/Remove** to open the Select Toolbar Items dialog box. Here, you can, for example, select and add icons related to reporting, views, or editing features. On the Toolbar Editor dialog box you can also choose whether to display the new icons as **Text Only**, **Icon Only**, or **Text and Icon**.



Select/Deselect items to Add/Remove from your Quick Access Bar.



In this sample, the Quick Access Bar has been modified to include icons for On Demand Templates and Account Information. After you make your selections, click **Apply** then **OK**. Your Quick Access Bar is now personalized.



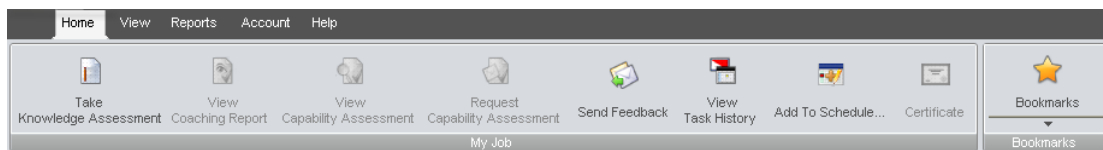
The Ribbon

To help you quickly find and use TRACCESS functions, they are grouped together in the Ribbon under tabs displayed as icon-based buttons. All roles will have the same basic menu items: Home, View, Reports, Tools, Account, and Help.

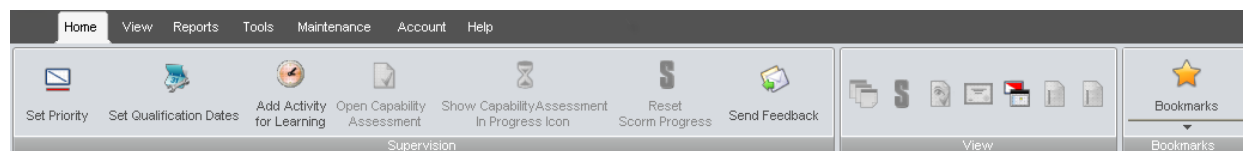


The Ribbon items change depending on your TRACCESS role and the function you have selected. The functions displayed depend on the Task, the activities associated with that Task, and the permissions that have been granted to your role.


For example, here is the Ribbon when a Learner or Supervisor selects a Task in the *My Job* window. Below that is the Ribbon that appears for Administrators. Additional functions are available in this role. Note how the items unavailable for a selected function are greyed out in Ribbons.

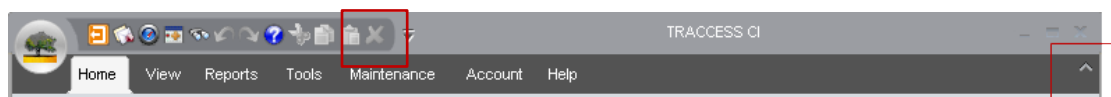


Sample Learner and Supervisor Ribbon



Sample Administrator Ribbon

You can collapse or expand the Ribbon by clicking on the  icon at the end of the Quick Access Bar, or the small show/hide arrow icon at the top right of the TRACCESS window.



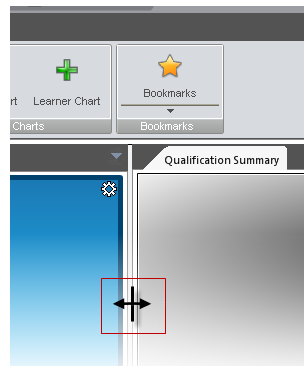


Customizing Your Dashboard

Your Dashboard layout is very flexible letting you organize multiple items to suit your information needs and visual preferences. Use the following suggestions to modify, move, and collapse windows, and to reorganize tabs.

Change Window Sizes

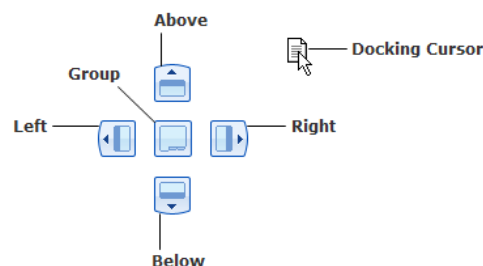
To change the size of a window, click on and drag the splitter left, right, or up or down—depending on whether you are changing a vertical or horizontal splitter.




Add Windows and Move Tabs

The Dashboard contains multiple items, which are integrated with tear-away tabs. These tabs allow you to easily customize your Dashboard by simply dragging and dropping items with the docking controls.

Below you can see the docking controls, which appear when you right click on a tab, then hold and drag the tab into a window on the Dashboard. As you hover over the docking controls, shaded areas appear indicating where your new window would be positioned.



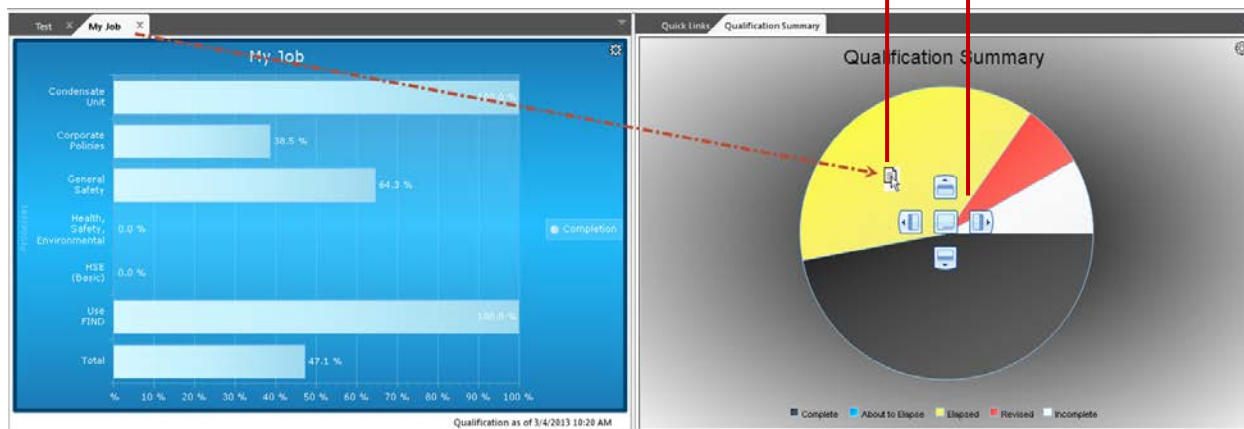
You will know when your tab is ready to be positioned in the new window because your cursor will appear with a document icon, known as a docking cursor: 

In the following example, the My Job tab has been dragged to the Qualification Summary window. The docking cursor indicates the tab is ready to be repositioned. The docking controls indicate the possible locations of the new window including the left, right, top, or bottom of the current window. Another option is to position and release the docking cursor in the center of the docking control. Then the My Job content would fill the current window and the original Qualification Summary window would be collapsed to a tab.



Docking cursor indicates tab is ready to be docked.

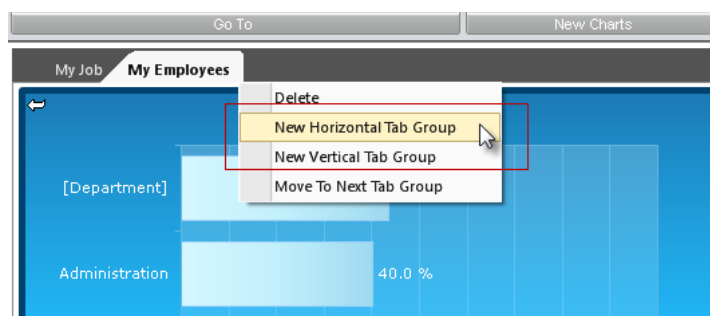
Docking controls show where new window could be located.



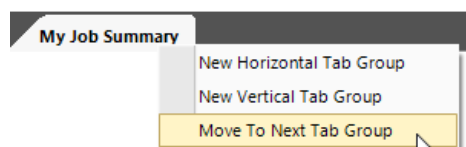
Alternative Customizing Method

Instead of dragging tabs to modify your Dashboard, you can also right click on tabs for some modification functions.

To add windows to your Dashboard, right click on a tab then click **New Horizontal Tab Group** or **New Vertical Tab Group**.



To move a tab from one pane to another, or to change a window to a tab, right click on a tab and select **Move to Next Tab Group/Move to Previous Tab Group**.



Tip: This method does not activate the docking controls so you have less control over where windows are positioned.

This completes the overview of the TRACCESS CI login process, the main Dashboard features, and how to tailor the Dashboard to your needs.