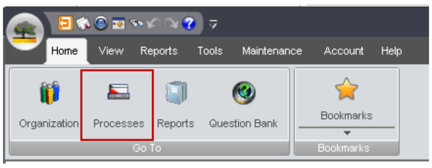
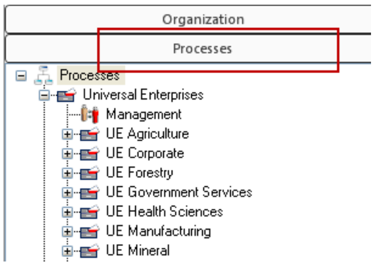
Manage Learning Processes and Tasks

This Quick Reference Guide reviews key Process and Task functions that you perform as a Subject Matter Expert (SME):

- Create Processes and Sub Processes
- Create Tasks and set Task properties
- Set Task relationships and usage
- Add Task resources
- Modify Process or Task objects
- Create Derived Processes

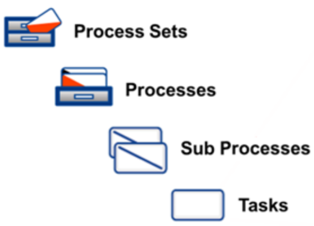
As an SME, you manage Process Sets, Processes, Sub Processes, and Tasks within the Processes manager. To access this area, click on the Processes button in the Ribbon or on the Processes manager heading.





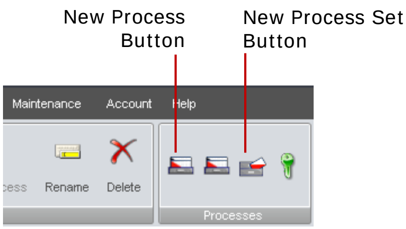
Create Processes and Sub Processes

In the Processes manager, the primary object is called a Task; however, Tasks are contained in one or more Process structures. There must be at least one Task in a Sub Process, and at least one Sub Process in a Process. Process Sets can be used to conveniently group similar learning Processes.



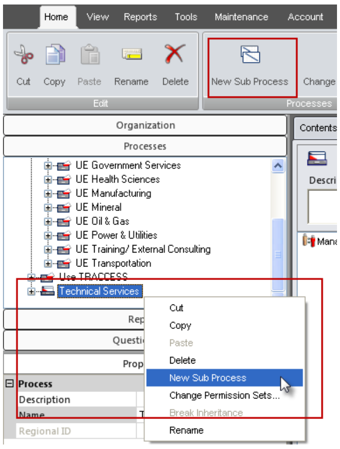
To create a Process Set or Process:

1. Open the Processes manager.
2. Select a Process Set or Process that was created by your System Owner.
3. From the Ribbon, select **New Process Set** or **New Process** as required.
4. Type the name of the new Process or Process Set in the highlighted area.



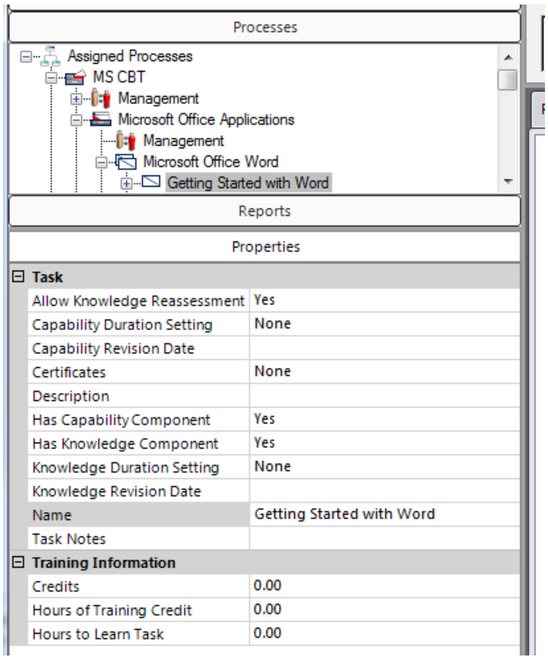
To create a Sub Process:

1. Click and select a Process.
2. From the Ribbon, select **New Sub-Process**.
3. Type the name of the new Sub Process in the highlighted area.

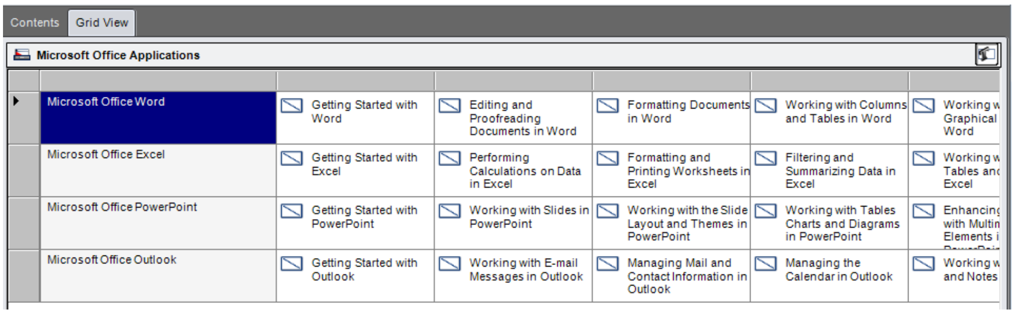


To create a Task:

1. Click on a Sub Process, right-click, and select **New Task**.
2. Type the name for this new Task, then click **Enter**. Define Task properties in the dialog box that appears in the lower part of the Manager pane. *Completing the Properties dialogue box is addressed in the next topic.*



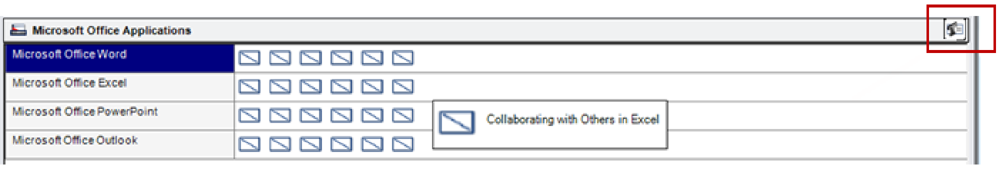
3. Continue adding as many Tasks as you need. When the Process is selected, you can view the Tasks as the Learner would see them with the Grid View tab.



If there are Task titles with too much text to display easily, use the Show/Hide icon to toggle to a simpler view. Then hover over Task folders to reveal their names.

Show/Hide Toggle

Show/Hide Toggle



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Primary Task Icons

The two main Task components are Knowledge and Capability, but a Task can have a number of other related settings, indicated by icons on the Task folder:

Task without either Knowledge or Capability component (under construction).

Knowledge component only.

Knowledge component only with duration.

Capability component only.

Capability component only with duration.

Both Knowledge and Capability components (Knowledge is indicated in upper right half)

Both Knowledge and Capability components, both with a duration.

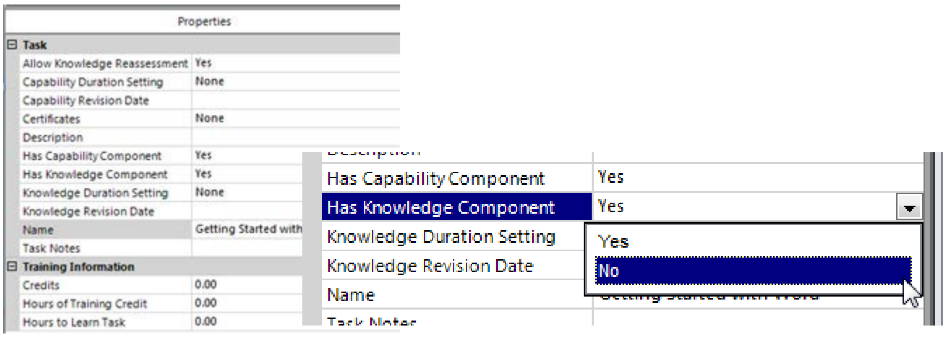
The Task folder icons will be determined by the properties that are set or modified for Tasks. The steps for setting Task properties are reviewed next.

Set Task Properties

The Properties dialog box appears in the lower manager pane when a new Task is created. Some Task properties are set by default. You need to define others using your SME knowledge. Typical properties determined by an SME include whether the Task has a Knowledge and/or Capability component, the Task Duration, and the Revision Date.

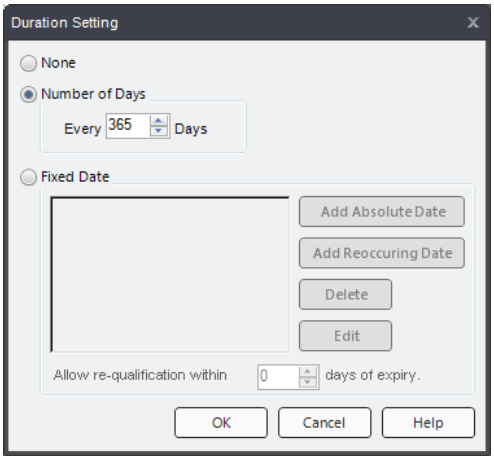
Knowledge/Capability Components

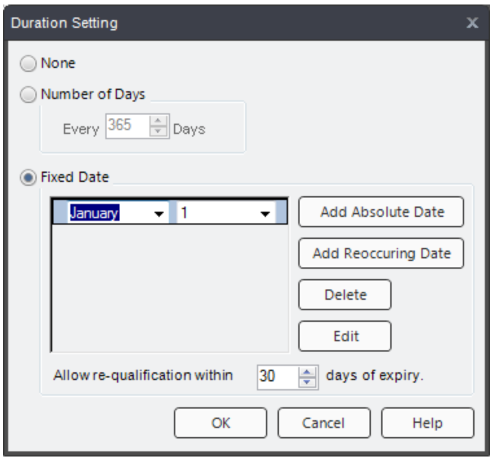
Tasks in TRACCESS contain Knowledge (theory) and/or Capability (practical) components. The Knowledge component is automatically set to 'yes.' The Task can be set be have the Knowledge component only, Capability component only, or both. You can change what component(s) the Task is made up of by changing the Knowledge or Capability Component property to *Yes* or *No*.



Knowledge / Capability Duration

If retraining in the Task is required at regular intervals, select the Knowledge or Capability Duration Setting. A Duration Setting dialog box will appear.





The most typical duration setting is the Number of Days option. Once a Task is completed, it will remain at a Complete status for the number of defined days. Alternatively, you can enter Absolute Dates (e.g. December 31, 2013) or Recurring Dates (e.g. each January 1 and July 1).

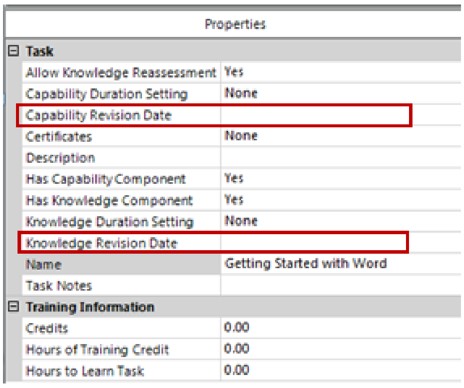
While a Learner can retake an assessment at any time with the Absolute Dates option, you can set the Fixed Date option so that reassessment is restricted to a period close to the specified date.

Revision Date

A key Task property is the Revision Date for Knowledge and/or Capability. Revision dates are set when the learning requirements change so significantly that Learners need to retrain, regardless of their last training date. Typically, this change occurs when there is a significant risk if employees continue to rely on the previous training.

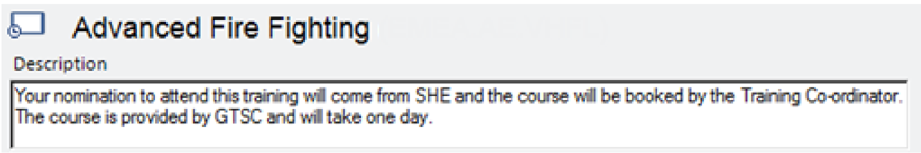
Set revision date:

1. Click on the Capability or Knowledge Revision date field.
2. A calendar appears. Select the date when the procedure was changed. The Task icon for all Learners trained before this date will turn red. The Task icon will remain black for those trained after the procedure changed.
3. A dialog box asks if you would like to send an email to Learners trained before the procedure changed, to encourage them to complete the new or updated training. You can edit the email to provide more specific information.



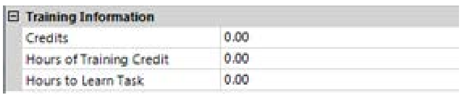
Task Description, Name, and Notes

The Properties dialog box includes fields for information about the Task including Description, Name, and Notes. The Description and Name fields are visible to all Learners. Informative data in those fields will be helpful to Learners. In the **Task Notes** field, you can enter points that will only be visible to SMEs.



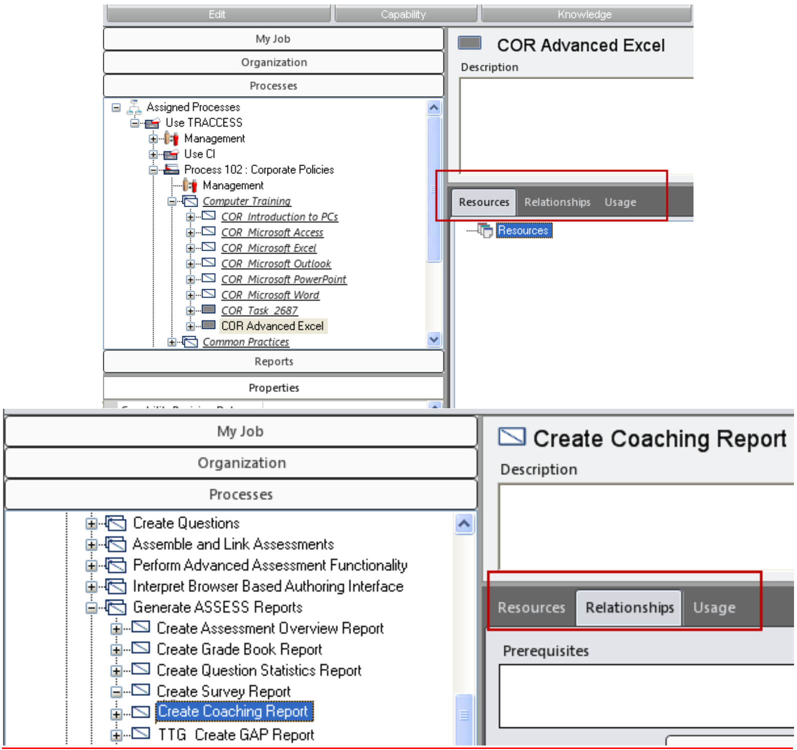
Training Information

The Training Information properties can include some values for standard time or credit units. The *Training Information Report* will collate these values to indicate, for example, the total training time spent this period.



Task Tabs

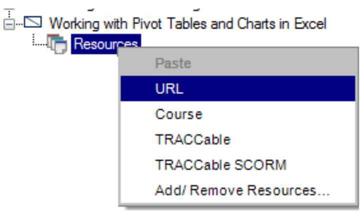
When you create a new Task in the Processes tree, three tabs also open in the context pane: Resources, Relationships, Usage. These tabs allow you to further design how the Task will function in the system and how it is to be completed by Learners.



Resources Tab

A resource is an information source used by the Learner to assist in completing a Task. Any number of resources can be linked to a Task. Categories and Sub-Categories can also be chosen for the resource. These will provide additional information and structure for the Learner which can be useful if the Task includes numerous resources.

There are three main types of resources:



 **URL** (Uniform Resource Locator) – Typically, this resource address links to a file external to the TRACCESS system; the file can be on the Internet, or even a local drive.

 **Course** – Usually this represents an external training course; completion of the Course completes the Task. The Learner's Supervisor can set the completion of the Course Resource type. Satisfactory completion of the Course will complete the Task.

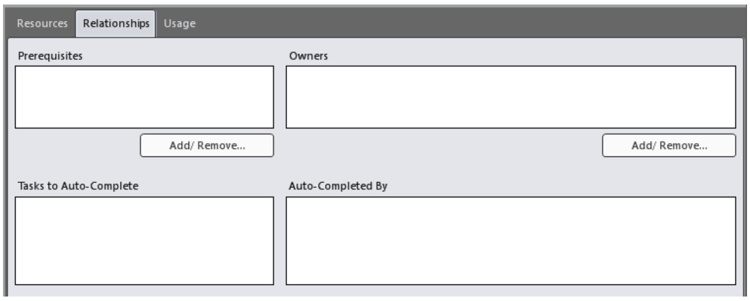
TRACCable – This resource also links to an external file but one where Learners can record their completion of the file review. If a **TRACCAble Resource** type is used, the Learner will be given an option to Mark as Complete. Then the background of the Resource icon will change to black. The Learner can revert this to Incomplete again if desired.

To add a Resource:

1. Expand the Task on the left hand side to reveal the Resources object.
2. On the Ribbon, select the type of resource item you want to add.
3. If the resource has already been entered into the database, reuse it by selecting **Add/ Remove Resources.**
4. When the resource is added, type the resource name in the highlighted field. To assist Learners, add a Description of the resource.

Relationships Tab

In this tab, the SME sets the relationships between Tasks. Some Tasks cannot be started until prerequisites set by the SME are completed. On the other hand, completing one Task may mean that another Task is also completed. The SME uses boxes in this tab to establish and manage those relationships. This tab is also where the owners of a Task—those who can modify Task properties—are displayed.



Prerequisites

A Task in TRACCESS can be a prerequisite of one or more other Tasks. Learners will receive a reminder that they should not complete Task 2 if the prerequisite Task 1 has not been completed.

To add a Prerequisite:

1. Select the Task from the Processes manager.

2. Click the **Relationships** tab on the context pane.

3. Click **Add/Remove** then select the appropriate prerequisite Task(s) from the dialog box that appears.

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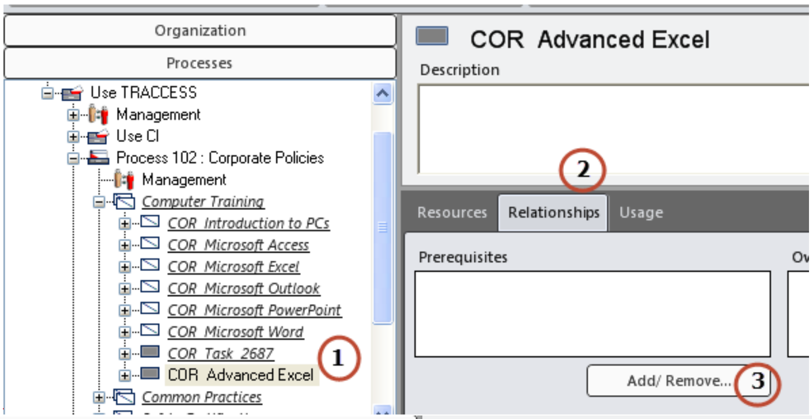
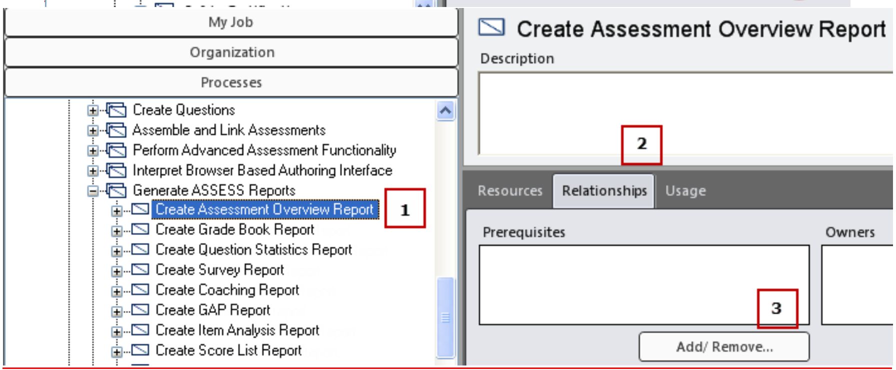
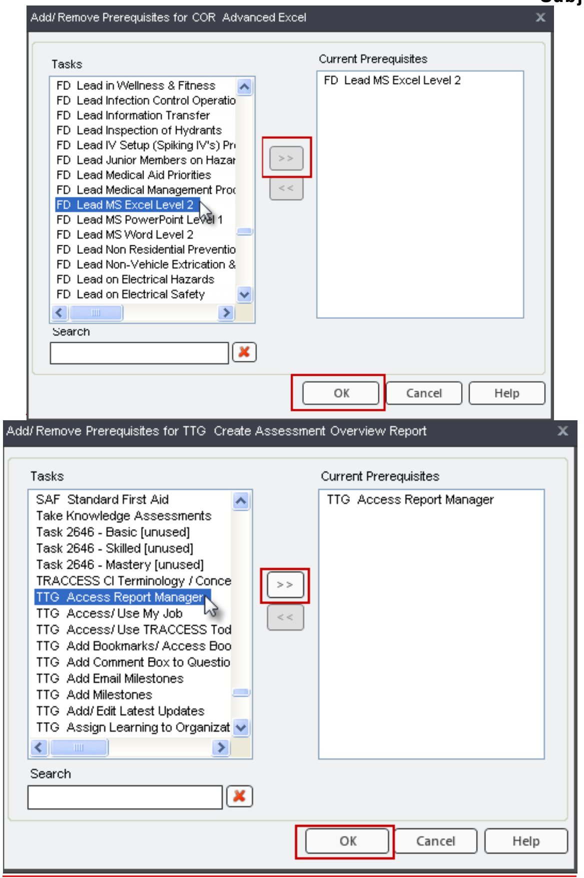
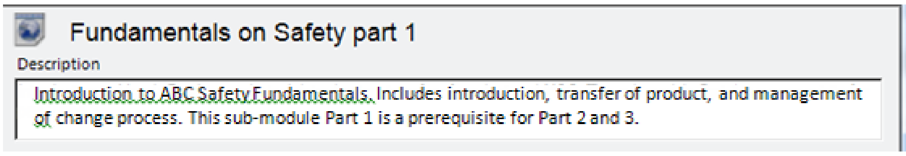




4. Click the add button >> then click **OK**.



The prerequisite Task selection process is complete. To help Learners identify prerequisite needs, include the prerequisite status of a Task in its description.



Owners

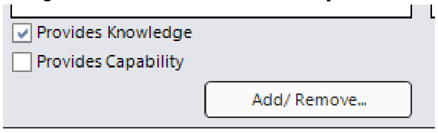
In the Relationships tab, the Owners box lets you specify one or more people who will have the ability to modify the properties of that Task. As the SME, you are automatically a Task Owner.

Tasks to Auto-Complete

The Auto-Complete feature allows you to specify more complex relationships between Tasks. For example, an off-site course set for one Task may achieve outcomes for one or more in-house Tasks. The Tasks to Auto-Complete feature allows the SME to assign one or more tasks to be automatically completed when a particular task is complete.

> ***Note:** You can also set up a single Task to be completed when multiple Tasks have been complete with the Groups to Auto-Complete feature. Please consult http://help.traccess.com/ for more info.*

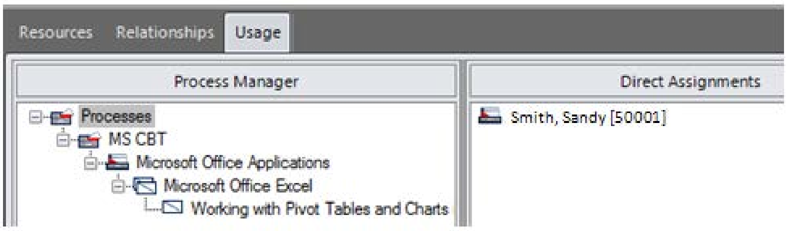
To set Auto-Complete, highlight a Task in the Process Manager, click the **Relationships** tab, then click **Add / Remove**. Select the Tasks to Auto-Complete using the Add/Remove button. The Relationships tab for each Auto-Completed Tasks will show the Task(s) that will lead to the Auto-Completion of that Task. If Tasks involved have a Capability component, the SME can restrict the sign-off to the Knowledge component so the Capability can still be confirmed internally.



As an SME, you will need to perform several processes related to the Auto-Complete function. Auto-Complete will set Tasks to complete; however, it cannot reset the status of a Task to incomplete. Auto-Completed Tasks must be reset individually by the SME. Also, any Refresher Durations of the source and Auto-Completed Tasks will need to be adjusted by the SME.

Usage Tab

The final Task tab—Usage—shows where that Task is used. This tab gives SMEs a fast and easy way to identify all the places a Task is being used or reused in the system—more specifically, where Tasks exist in Processes and Direct Assignments. This function is especially useful when a change needs to be made to a Task. It gives an SME a complete understanding of how the change could affect the system.



Altering the Process Layout

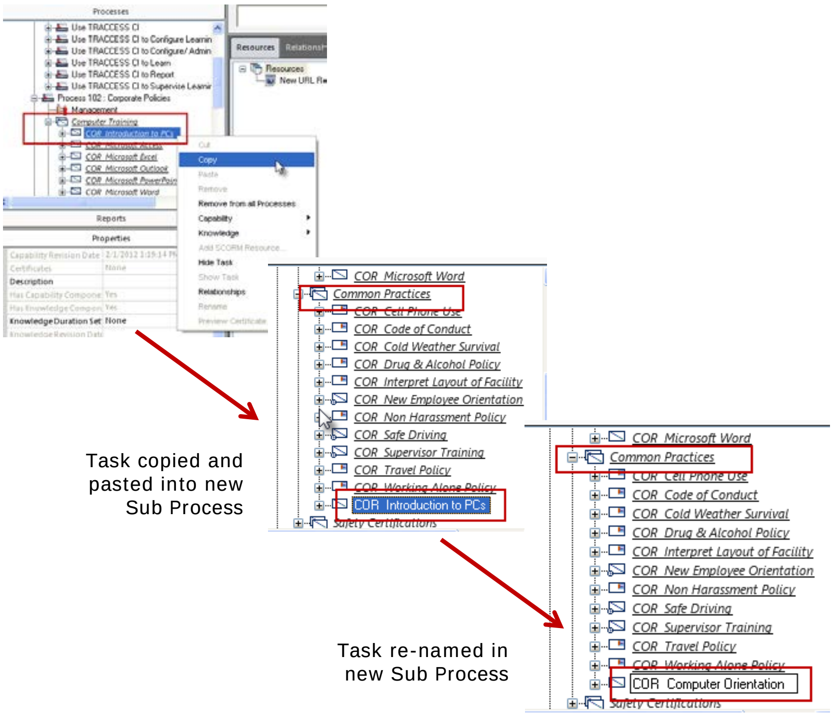
Modify Processes, Sub Processes, or Tasks

To rename a Process, Sub Process, or Task, simply highlight the item, select the **Rename** option from the right-click menu or the Ribbon, then enter the new name in the highlighted field.

If you have the appropriate permissions, you can rearrange the order of a Sub Process or Task. To move an item, drag the item to the target location then drop it. The dragged object will appear after the object it was dropped on to. Drag and drop the items again as needed to place them appropriately.

Copy or Delete Objects
You can easily copy an object from one part of the Process Manager to another. Process Sets, Processes, and Sub Processes can be Copied or Deleted. If copied, they will keep the same name though they are new objects so you may want to rename the copied item.

In this example, the Task, COR Introduction to PCs, is copied from the Computer Training Sub Process then pasted into the Common Practices Sub Process. The pasted Task has kept its name but the highlighting shows that new information can be entered over that title. In the third image, the new Task name, COR Computer Orientation, has been entered over the highlighted text



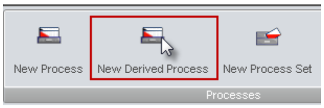
If an object is deleted, the Tasks in the object are not deleted but become invisible. The related structure of the Process Set, Process, Sub Process, is lost. Tasks cannot be deleted until they are removed from all active use. Even when Tasks are Removed, Learning records are until the Task is deleted. Then Learning Records are lost. To retain the Learning records, the Task should be archived not deleted.

Create Derived Processes

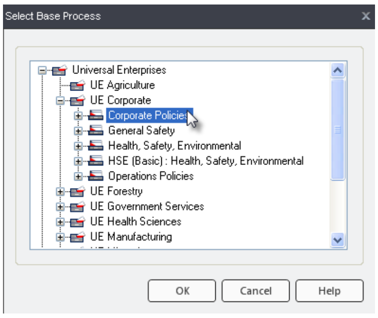
A Derived Process is created by copying a parent or Base Process then hiding the Tasks not relevant to your Organization Unit or group of Learners. Any changes to the Parent Process are reflected in the Derived Process. Derived Processes are an efficient way to create a Master Process and then one or more versions of that Process.

To create a Derived Process:

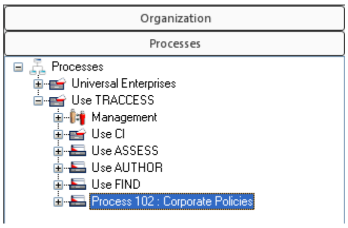
1. Open the Processes manager and select a Process Set or Process.
2. In the Ribbon select **New Derived Process**. The Select Base Process dialog box appears.



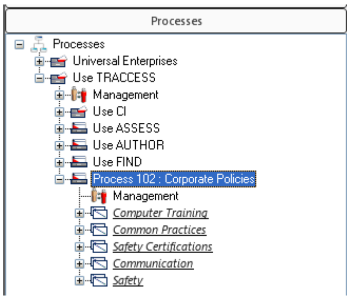
3. In the Select Base Process dialog box, highlight the Process you want to use as a Base for your new Derived Process, and click **OK.** A new derived Process appears at the bottom of the Processes list in edit mode with the name of *Derived Process: Base Process*.



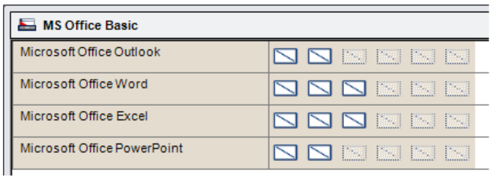
4. Type the name of the new Derived Process in the highlighted area and press **Enter**.

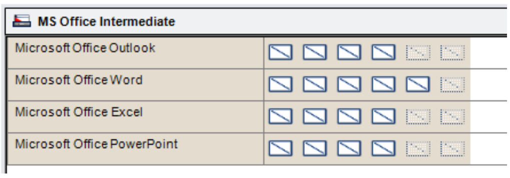


5. The new Process will be displayed. Expand the Process and Sub Process to view individual Tasks. Sub Processes and Tasks that are inherited by the Base Process appear in italics.

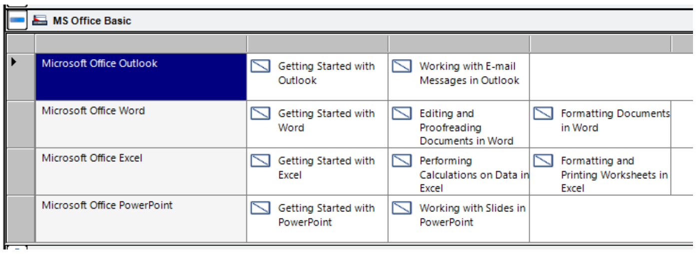


6. To hide Tasks not relevant to the Organization unit or group of Learners, right-click on the Task and select **Hide Task**. Hidden Tasks will appear in grey font. To show a hidden Task, right-click on the previously hidden Task, and select **Show Task**.





When the Derived Process is assigned to an Organization Unit, the Learners will only see the Visible Tasks.



In the Processes manager for an SME, the name of the Derived Process will appear as **Derived Process: Base Process**. For an Operational Administrator or Learner, the Process name will show as **Derived Process** only.

This completes the review of key processes and functions a SME uses in TRACCESS CI.