Online Tracking System

Quick Reference User Guide

UTMB
The University of Texas Medical Branch

UTMB's Online Tracking System
Quick Reference - User Guide

This guide is designed to provide you with step-by-step instructions on how to use the tracking system.

Main Menu:

Training/Tracking System – This button will take you to the training system portion where you can complete and/or review your own personal online training and the tracking system.

Trackables – This section allows you to assign and un-assign training to individual employees and edit the managers/employees in your group(s).

Historical Reports – This section contains reports for individuals, groups and courses with historical data. The data in this section is not up to date and could be inaccurate.

Administrator Reports – This section contains up to date reports for individuals, groups, courses and managers. You can also pull reports on non-course trackable items and send e-mail to employee's within your group(s).

Help – This section will give you technical contact information.

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Trackables – Assign a User Training

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Trackables button or Trackables link.
4. Click on the Assign a User Training link.
5. Select the course title from the Course Assignments drop-down list.
    a. The Assigned Users box will show you the employees within your group(s) that are already assigned the course you chose.
    b. The Unassigned Users box is used to search for the employee(s) you would like to assign the course to.
6. Type the employee's first or last name or employee id in the search field located below the Unassigned Users box.
7. Adjust the method to name or employee id, depending on which method you would like to use to search.
8. Click the Search button.
    a. If the employee's name does not appear in the Unassigned Users box please double check your spelling, method. If this is correct, please check the Assigned Users box and verify that the employee is not already assigned the course.
9. Select the employee's name in the Unassigned Users box.
10. Click the Add button.
11. Review the Assigned Users list to verify that the course is now assigned the employee.

Additional Tips:

If you would like to search for anyone in your group(s) that is not currently assigned the specified course then you can type in your eight (8) digit org-id in the search field and change the method to Org-ID and then click the Search button.

Trackables – Remove a User Training

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Trackables button or Trackables link.
4. Click on the Remove a User Training link.
5. Type the employee's first or last name or employee id in the search field located next to the Users box.
    a. The filter by last name feature does not apply to this section of the system. Please search by typing in the criteria.
6. Adjust the method to name or employee id, depending on which method you would like to use to search.
7. Click the Search button.
    a. If the employee's name does not appear in the Users box please double check your spelling, method. If this is correct, please verify that this is an employee that you have access to by viewing your Group (Edit User Group Assignment instructions).
8. Select the employee's name in the Users box.
9. Review the Assigned Courses listed for that employee.
10. Click the course title that you would like to un-assign from the employee.
11. Click the Un-assign Course button.
12. Review the list of courses in the Assigned Courses box to verify that the course is no longer assigned to the employee.

Additional Tips:

If you would like to search for everyone in your group(s) instead of searching individually then you can type in your eight (8) digit org-id in the search field and change the method to Org-ID and then click the Search button.

The Reset Failed Attempts button is currently not applicable. This feature is for future use only.

Trackables – Edit User Group Assignments

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Trackables button or Trackables link.
4. Click on the Edit User Group Assignments link.
5. Type the org-id or group name in the search field located below the Groups box.
6. Adjust the method to group id or group name, depending on which method you would like to use to search.
7. Click the Search button.
    a. The search method is best used by those that have several groups. You can also scroll through the Groups box and click on the Group you would like to select.
8. Select the group from the Groups box.
9. Review the Users Assigned to Group and Managers Assigned to Group lists to verify that the correct employees/managers are assigned.

    Step 9a to add/remove an employee from your group or review step 9b to add/remove a manager to your group.

    a. To add or remove an employee from your group click the Users button located to the right of the Groups box.
        i. The Assigned Users box shows you a listing of everyone that is currently assigned to your group.
            1. To remove an employee from your group scroll through the Assigned Users list.
            2. Select the Users Name.
            3. Click the Remove button.
            4. Review the Assigned Users list to verify that the employee has been removed.

ii. The Unassigned Users box is used to search for the employee(s) you would like to assign the course to.

1. Type the employee's first or last name or employee id in the search field located below the Unassigned Users box.
2. Adjust the method to name or employee id, depending on which method you would like to use to search.
3. Click the Search button.
4. Select the employee's name in the Unassigned Users box.
5. Click the Add button.
6. Review the Assigned Users list to verify that the course is now assigned the employee.

b. To add or remove a manager/admin from your group click the Managers button located to the right of the Groups box.

i. The User Group Managers shows you a listing of managers/ admin/dept. head that currently have access to your group.

1. To remove a manager from the group scroll through the User Group Managers list.
2. Select the manager/admin/dept. head name.
3. Click the delete button.
4. Review the list to verify that the manager/admin/dept. head no longer has access.

ii. Adding a manager/admin/dept. head.

1. Scroll through the Manager drop down list.
2. Select the manager/admin/dept. head name.
3. Select the role from the drop down list.
4. Click the add/update button.
5. Review the list to verify that the manager/admin/dept. head is now listed in the User Group Managers box.

Additional Tips:

Any manager/admin/dept. head assigned at the main org-id level (those group numbers with the 4 "0"s at the end) will automatically have access to all of the sub-groups.

Administrator Reports – User Reports

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Administrator Reports button or Administrator Reports link.
4. Click on the User Reports link.
5. Type the employee's first or last name or employee id in the search field located next to the Users box.
6. Adjust the method to name or employee id, depending on which method you would like to use to search.
7. Click the Search button.
    a. If the employee's name does not appear in the Users box please double check your spelling, method. If this is correct, please verify that this is an employee that you have access to by viewing your Group (Edit User Group Assignment instructions).
8. Select the employee's name in the Users box.
    a. The **User Assignments Page Report** shows all the courses that have been assigned to the employee and the due dates. This report is exactly what the employee sees when they login.
    b. The **User Transcript Page Report** shows all courses (pass and fail) that have been attempted/completed by the employee. This report is exactly what the employee sees when they login.
    c. The **User Historical Transcript Page Report** shows all courses (pass and fail) that had been attempted/completed by the employee up to 8/31/2005. This report is exactly what the employee sees when they login.
    d. The **User Surveys Report** shows how the employee answered their enrollment questionnaire.
    e. The **Users Login Data Report** will not be accessible, it is available for IS purposes only.

Additional Tips:

The User Assignments Page Report gives you a listing of all the assignments the employee has. One time only courses will appear with a checkmark once it's complete, while recurring courses will rollover to show the next due date once the employee has completed the current assignment.

If an employee has any courses showing as past due they will not be able to complete any of their current assignments until the past due courses are completed.

The User Current and Historical Transcript Page Reports allow you to print certificates of completion for your employee's record.

Administrator Reports – Trackable Reports

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Administrator Reports button or Administrator Reports link.
4. Click on the Trackable Reports link.
5. Select the requirement type from the Catalog drop down list.
6. Select the trackable item from the Item drop down list.
7. Choose the data you would like to filter the report by. Date type, date to, date from, user status and trackable status.
8. Click Generate Report.
9. This report will show you the employee's status for the trackable item you selected.

Additional Tips:

This report is usually used to review the status of an employee's Standards of Conduct Guide card or New Employee Orientation attendance.

Administrator Reports – New Hires Report

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Administrator Reports button or Administrator Reports link.
4. Click on the New Hires Report link.
5. This report is still under construction.

Administrator Reports – Course Reports

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Administrator Reports button or Administrator Reports link.
4. Click on the Course Reports link.
5. Type the course title in the search field located to the right of the Courses box.
6. Adjust the method to course name or course description, depending on which method you would like to use to search.
7. Click the Search button.
    a. You can also scroll through the Courses box and click on the course you would like to select.
8. The report links should appear below the courses box.
    a. The **Classroom Roster Report** and **Classroom Registered Users Report** will not be accessible. They are available to course sponsors only.

Administrator Reports – Group Reports

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Administrator Reports button or Administrator Reports link.
4. Click on the Select a Group Report link.
5. Type the group id or group name in the search field located to the right of the Groups box.
6. Adjust the method to group id or group name, depending on which method you would like to use to search.
7. Click the Search button.
    a. The search method is best used by those that have several groups. You can also scroll through the Groups box and click on the Group you would like to select.
8. Select the Group from the Groups box.
    a. The **Group Compliance Report** will give you a listing of the courses each employee is assigned, the assigned date, due date and whether they are compliant.
    b. The **Group Completion Report** will give you a listing of the courses each employee is assigned, the assigned date, last completion date, the due dates for their next three assignments and whether the assignment(s) are complete or incomplete.

Additional Tips:

The Group Compliance Report will see the employee as compliant after the first time they complete a course. Due to this, the report is best used to quickly view whether the employee has completed a one time only course, not the recurring courses.

Administrator Reports – Select a Manager Report

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Administrator Reports button or Administrator Reports link.
4. Click on the Select a Manager Report link.
5. Type the manager/admin/dept. head's first or last name or employee id in the search field located next to the Managers box.
6. Adjust the method to name or employee id, depending on which method you would like to use to search.
7. Click the Search button.
    a. If the manager/admin/dept. head's name does not appear in the Managers box please double check your spelling, method. If this is correct, then they may not have access as a manager/admin/dept. head in the online tracking system.
8. Select the employee's name in the Managers box.
    a. The **Managers of Groups Report** shows a listing of the org-id(s) that the selected manager/admin/dept. head has access to and what their role is for each group.

Additional Tips:

If the manager/admin/dept. head is not listed or does not currently have access please send an email to amtyson@utmb.edu with the employee's name and id to request the access.

Although there are three different role types (manager, admin, and dept. head) there is currently no difference in the level of access.

Administrator Reports – Manager of Employees Report

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Administrator Reports button or Administrator Reports link.
4. Click on the Managers of Employees Report link.
   a. This report will give you a complete list of the employee's you have access to, the org-id they are in and the employee's hire date.

Administrator Reports – Send Users Email

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Administrator Reports button or Administrator Reports link.
4. Click on the Send Users Email link.
5. You can select an individual employee or leave the selection as is to send the email to all employees.
6. Type in the subject of the email.
7. Type the body of the email.
8. Click the Send Email to Users button.

Additional Tips:

NOTE: If you do not select an individuals name from the list, the email will be sent to everyone listed in the Users to Email box.

Administrator Reports – Send Instructors or Managers Email

Step-by-Step Instructions

1. Login to http://training.utmb.edu.
2. Click on the Tracking System button.
3. Click on the Administrator Reports button or Administrator Reports link.
4. Click on the Send Instructors, Managers, and Administrators, Department Heads or Supervisors Email link.
5. Place a checkmark next to the role(s) that you would like to send an email to.
6. Click the apply button.
7. You can select an individual or leave the selection as is to send the email to all employees.
8. Type in the subject of the email.
9. Type the body of the email.
10. Click the Send Email to Users button.

Additional Tips:

NOTE: If you do not select an individuals name from the list, the email will be sent to everyone listed in the Users to Email box.

Technical Contact:

- User System Issues – UTMB Help Desk at (409) 772-5200
- Tracking System Administrator Issues – Angela Tyson at (409) 747-6706 or amtyson@utmb.edu .

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