Department of Education

TRAC User Guide

Contents

1. TRAC works for you

The TRAC (**T**ool for **R**ecording **A**ssistance **C**ontacts) system is a Web-based technical assistance portal created for the benefit of Ohio educators. It is managed and supported by the Ohio Department of Education (ODE).

1.1. How do you benefit from TRAC?

Anyone who provides technical assistance to educators and education related entities in Ohio, benefits from TRAC. The TRAC application users can used perform the following actions:

- Find technical assistance activities scheduled for a particular organization.
- Record technical assistance that they have provided to organizations.
- Link technical assistance activities to Products, Program, and Services (PPS) from the STARS (System to Achieve Results for Students) system.
- Create summary and detail reports of technical assistance activities provided to an organization.

1.2. How does Ohio benefit from TRAC?

ODE's management, delivery, and support of TRAC enables Ohio's educators to benefit from a consistent, streamlined method of collecting data from all ODE offices and provides the following benefits:

- Enables ODE to make better service delivery decisions.
- Enables TRAC users to record technical assistance activities when away from the office.
- Enables ODE to monitor and evaluate technical assistance activities.

1.3. Using this document.

Novice users will want to read the entire manual. Those who are familiar with TRAC and feel comfortable with its user interface will benefit from this guide by reading specific areas of interest.

1.4. Acronyms and terms

Table 1 contains a list of acronyms, terms and definitions that are used throughout this document.

Table 1. Acronyms, Terms, and Definitions

Acronym or Term	Definition
ESC	Education Service Center
OEDS	Ohio Education Directory System
ODE	Ohio Department of Education
PPS	Product, Program or Service
TA	Technical Assistance
TRAC	Tool for Recording Assistance Contacts

1.5. ODE Roles and Responsibilities

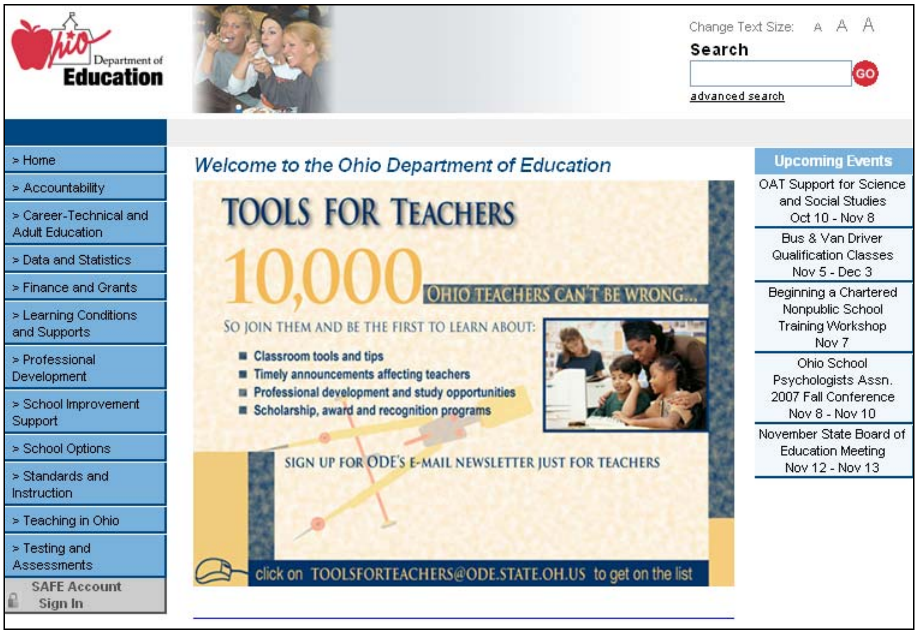
Table 2 contains a list of roles and responsibilities allocated within ODE.

Table 2. ODE Roles and Responsibilities

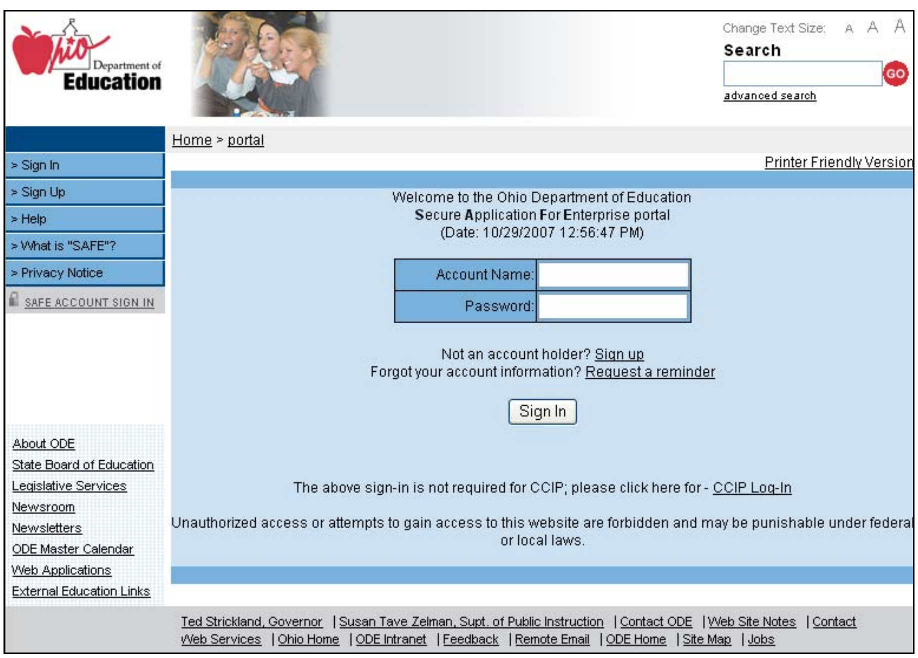
Role	Responsibility
Staff – TRAC	Internal Ohio Department of Education Employees who need to enter TA activities.
Consultative Staff – TRAC	Employees contracted by Ohio Department of Education to perform TA activities on behalf of the department.

2. Accessing TRAC

To access the TRAC application, a SAFE account and login are required. SAFE can be accessed from the main ODE internet site by clicking on the “SAFE Account Sign In” button on the left menu.



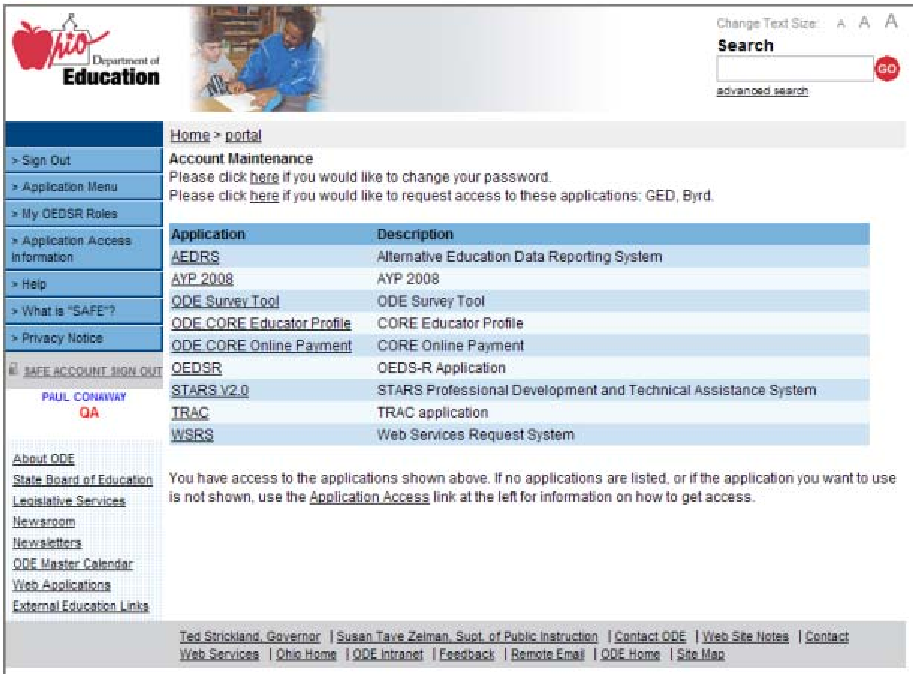
The SAFE portal login screen will be displayed.



Enter your Account Name and Password and click on the “Sign In” button.

Note: If you do not have a SAFE account or do not remember your Account Name or Password, follow the instructions on the screen.

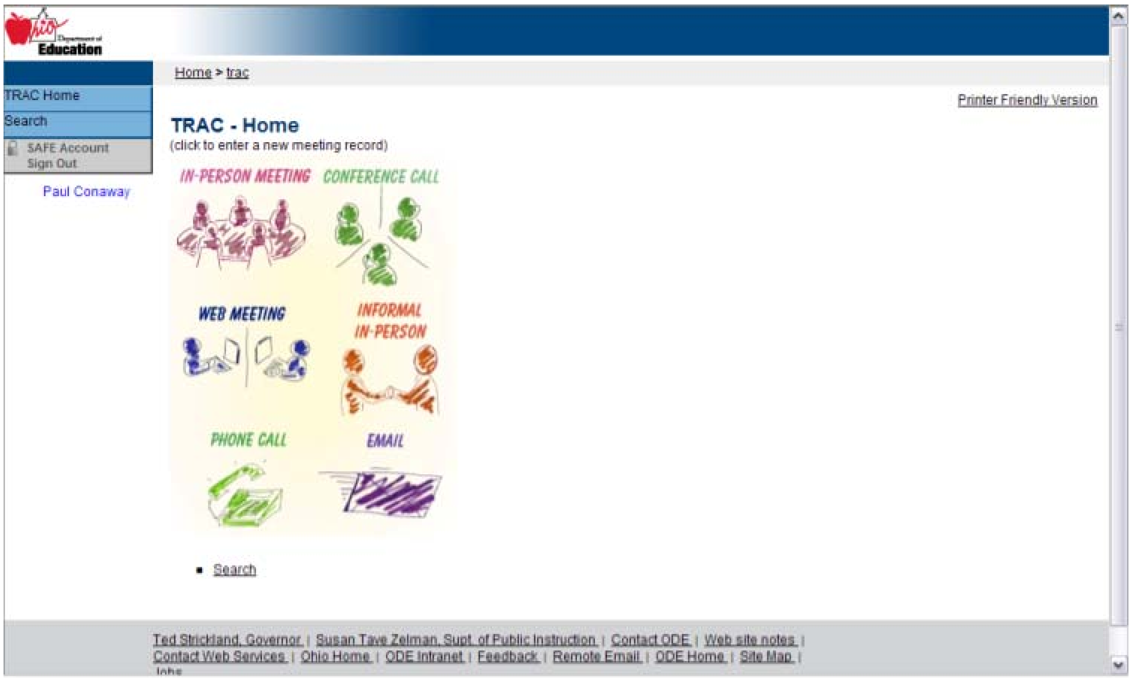
The portal screen will be displayed. The list of applications that you can access will be listed on the screen. Select “TRAC” from the list.



3. TRAC Home

The TRAC Home contains the following menu options for All Users:

- TRAC Home menu item
- Search menu item
- Icons for the six types of technical assistance activities. (In-Person Meeting, Conference Call, Web Meeting, Informal In-Person, Phone Call, Email)



4. TRAC Activity Creation

The TRAC application consists of six activity types. These six activities fall into the two categories Formal Activities and Informal Activities.

Formal Activities: Formal activities can have more than one agenda topic.

- In- Person Meeting
- Conference Call
- Web Meeting

Informal Activities: Informal activities can have only a notes field and a specific time, as supposed to a range and duration like the Formal ones.

- Informal In-Person
- Phone Call

- Email

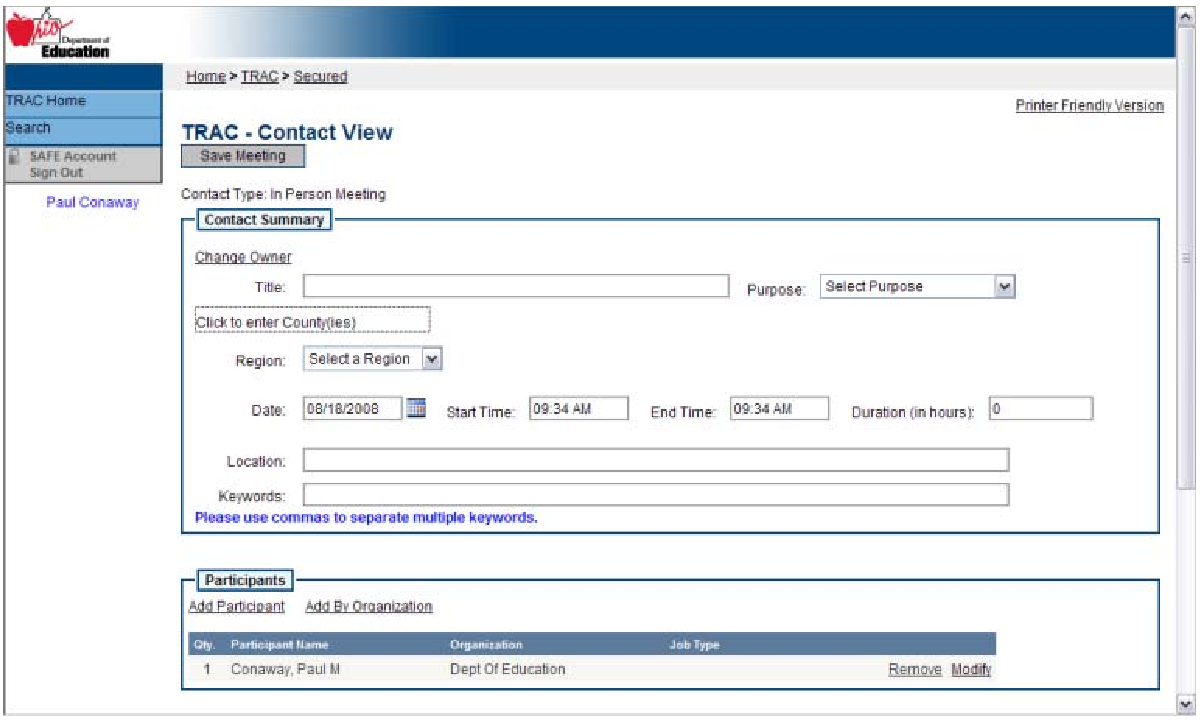
To create a new TRAC activity click on the icon for the activity type you wish to create.

A TRAC activity consists of four sections of information. These sections are Contact Summary, Participants, Attachments, and Agenda Topics/Notes. Instructions on completing the sections are detailed below.

Once all the sections are completed click the **Save Meeting** button at the top of the screen.

4.1. Contact Summary Section

The first section is the Contact Summary section. In this section basic information is entered about the technical assistance activity.

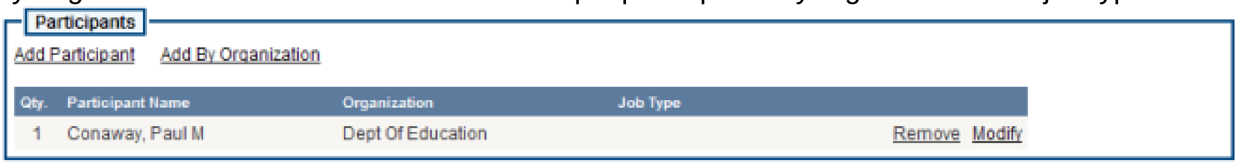


- Change Owner Link – Upon creation of the TA activity the user that enters the activity information will be made the owner of the activity. Changing the owner will allow another user to also edit the activity. Only the creator and the owner of the TA activity can edit an activity. (i.e. an administrative assistant entering information for their boss.)
- Title – Descriptive title for the TA activity. **Required Field**
- Purpose – The purpose of the TA activity. This is a drop down field and the choices are: Needs Assessment, Planning, Implementation, Monitoring and Evaluation. **Required Field**
- Click to enter County(ies) – Clicking on this link will display a list of counties to choose from. Highlight a county from the left hand side and then click on the double arrow button to move it to the right hand side. Multiple counties can be selected. This field allows the user to associate the TA activity with a county or list of counties. This field is optional and only needs to be filled in if the TA activity needs to be tracked by county

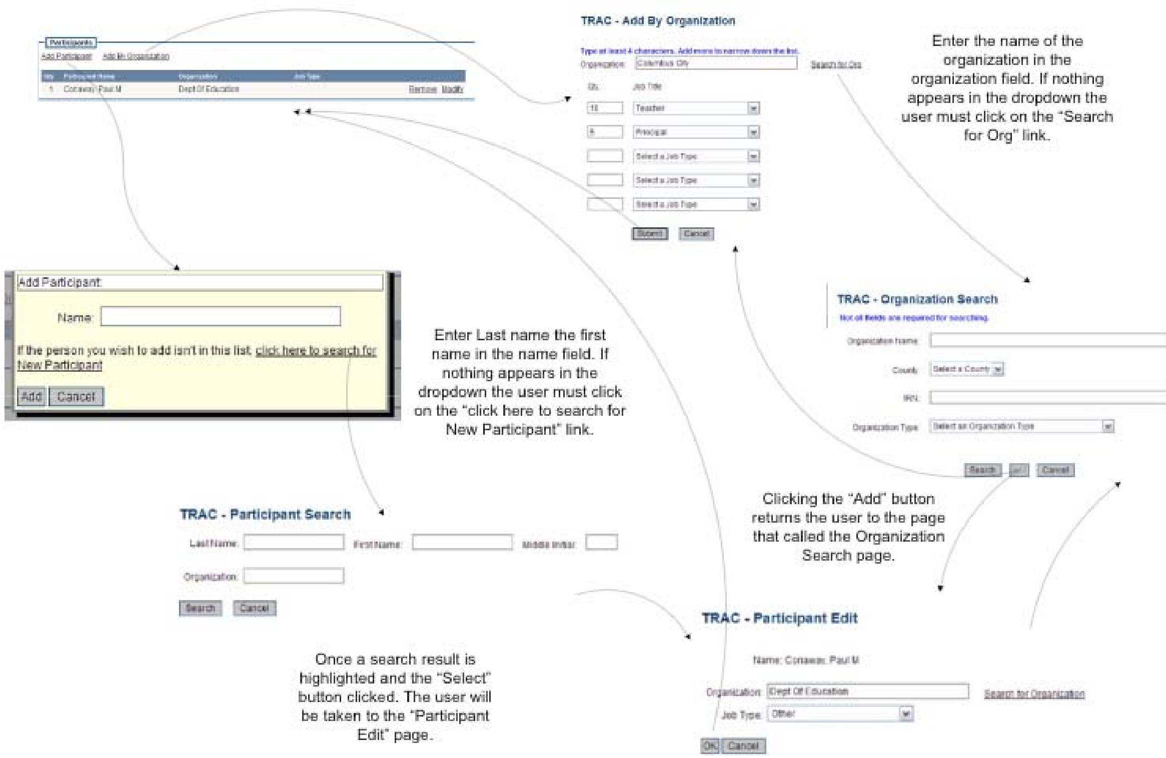
- Region – Select the appropriate region from the drop down list. This associates the TA activity with the region. This field is optional and only needs to be filled in if the TA activity needs to be tracked at the regional level.
- Date – This is the date of the activity. There are no restrictions on the date both future and past dates are allowed to facilitate planning and recording TA activities after the fact.
- Start Time – The starting time of the TA activity. Along with the end time of the activity the TRAC system will determine the duration of the activity.
- End Time – The ending time of the TA activity.
- Duration – Length of the activity. The TRAC system will calculate the duration of the activity based on the Start and End times of the activity. The duration must be greater then zero. The duration can also be reduced from the value that was calculated (if a break was taking during the activity). The duration cannot be extended beyond the maximum calculated by the TRAC system.
- Location – The location where the TA activity took place.
- Keywords – Keywords allow organization of TA activities. Commas separate multiple keywords. Keywords can be multiple words these become key phrases. "***School Improvement, Region 10, SIRI***" would be 3 separate keywords/key phrases. 1.School Improvement, 2. Region 10, 3. SIRI

5. Participants Section

Participants are entered in this section of the screen. There are two different methods to enter participants - the add participant link allows the user to add an individual person, while the "Add by Organization" allows the user to add multiple participants by organization and job type.



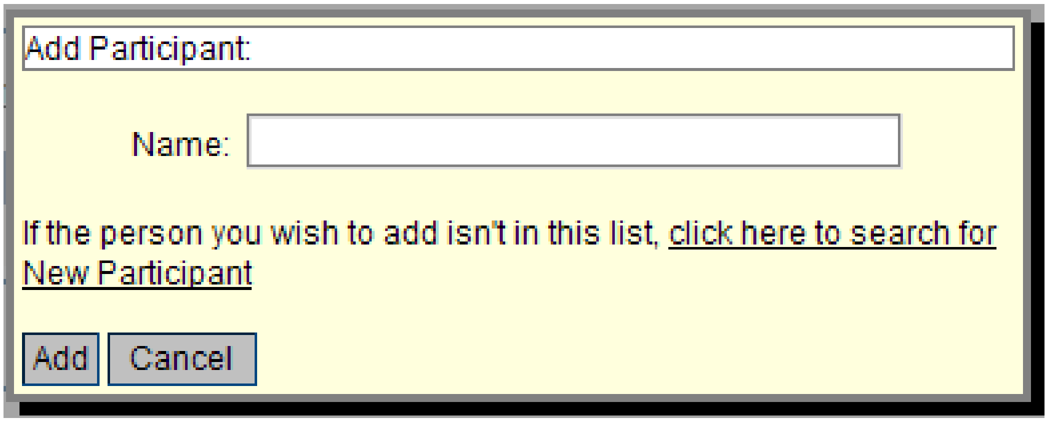
The diagram shows the flow between the different Participant section screens.



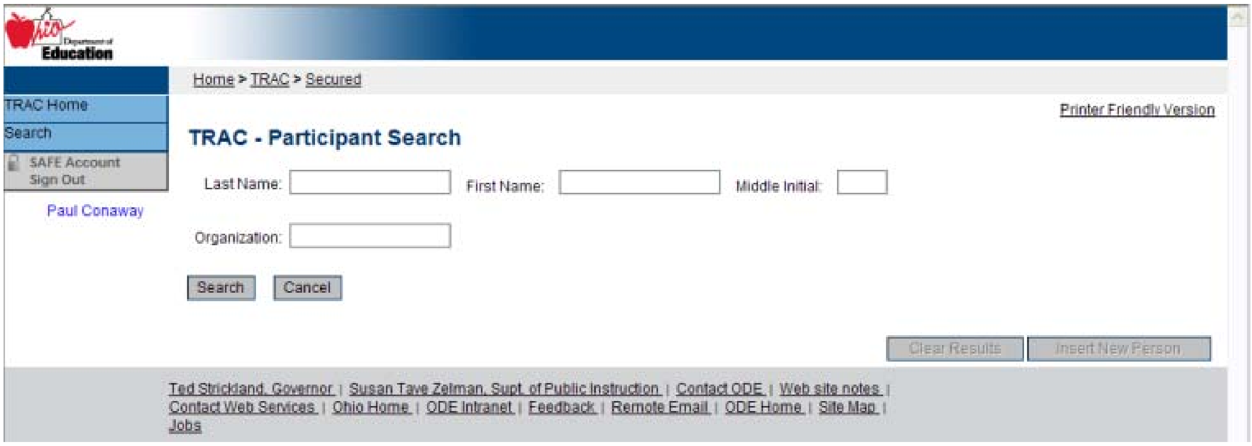
5.1. Add Participant

Perform the following procedure to add an individual Participant to the TA activity.

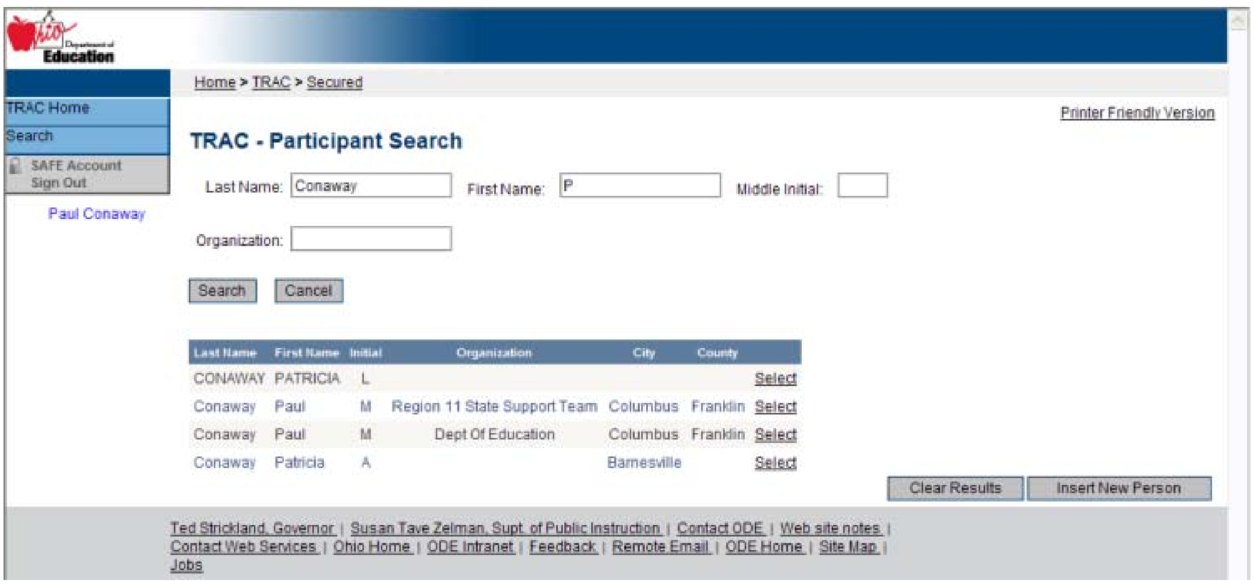
Click the **Add Participant** link in the Participants Section.



The Add Participant pop up window will appear. Start by typing a few letters of the participant's last name. If the participant has been used before TRAC displays a drop down with participant's that match the characters typed. Select the correct participant and click the add button. This will add the participant into the TA activity. The participant will have the same job type and organization from the previous use of the participant. If no participants appear in a drop down list then click on the **Click here to search for New Participant** link. If the participant doesn't' appearing in the drop and the "**Add"** button is clicked TRAC returns to the Contact View page with an error message at the top of the page.



Type in the appropriate search information to locate the participant, followed by clicking the search button. Be sure to include as much information as possible.

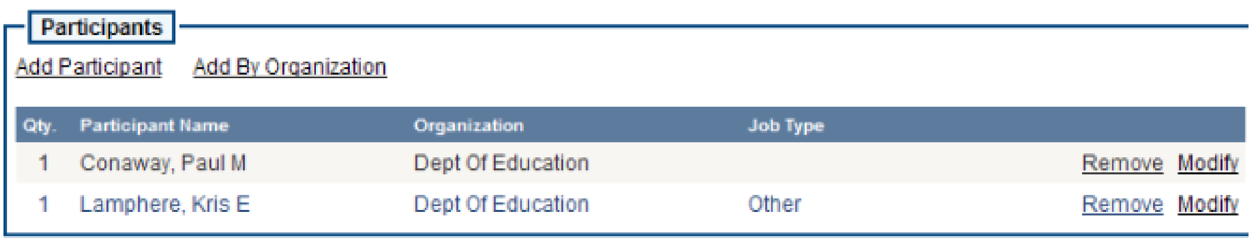


Clicking on the select button for the person selects the participant and takes the user to the Participant Edit screen. Only one person can be selected at time.

On the Participant Edit screen you can:

1. Select the Participant's Job Type
2. Select the Participant's Organization from quick drop down
3. Click the "**Search for Organization**" link to search for the Participant's organization if it doesn't appear in the quick fill drop down. If the organization doesn't appear in the quick fill drop down you must use the "Search for Organization" button to find a valid organization. (see *5.3 Search by Organization* section below.)

Once the appropriate information for the selected participant is displayed on the screen click **OK.**

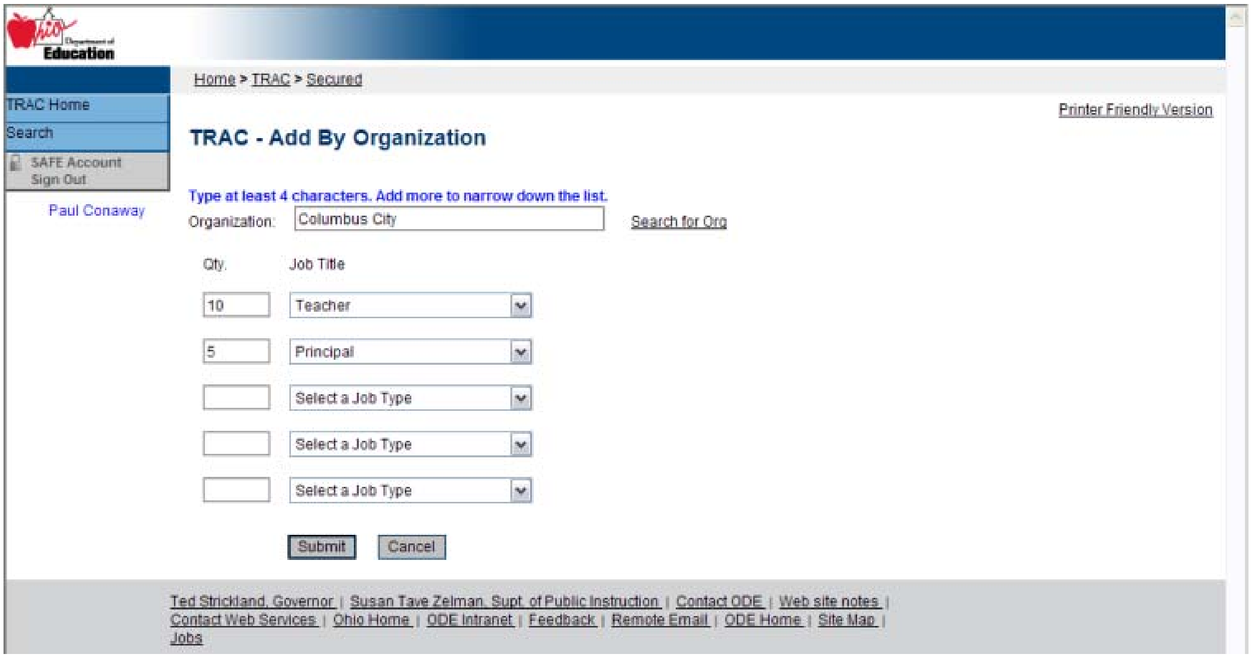


5.2. Add by Organization

To add multiple participants by Job Type or Organization click on the **Add by Organization** link. The screen below appears.

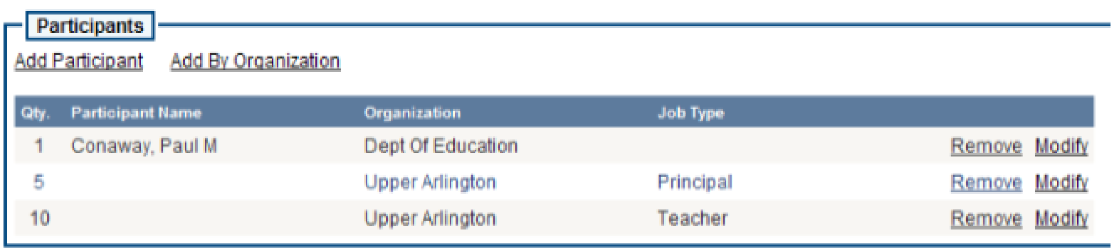
Enter a few characters from the Organization name in the Organization field. TRAC will then try to distplay a list of Organization names based on the characters typed in. If TRAC finds a match, choose the match from drop down list. When no match is found click on the **Search for Org** link to search for a valid organization, this must be done if no organization was found in the drop down list. (see *5.3 Search by Organization* section below.)

Enter the quantity of participants and then select the job type associated with quantity. A maximum of 5 job types can be entered at one time. Both the Organization name and at least one Job Type with quantity must be entered.



Repeat the process if more that 5 job types from one Organization participated.

Click the **Submit** button to add the participants by job type to the TA activity.

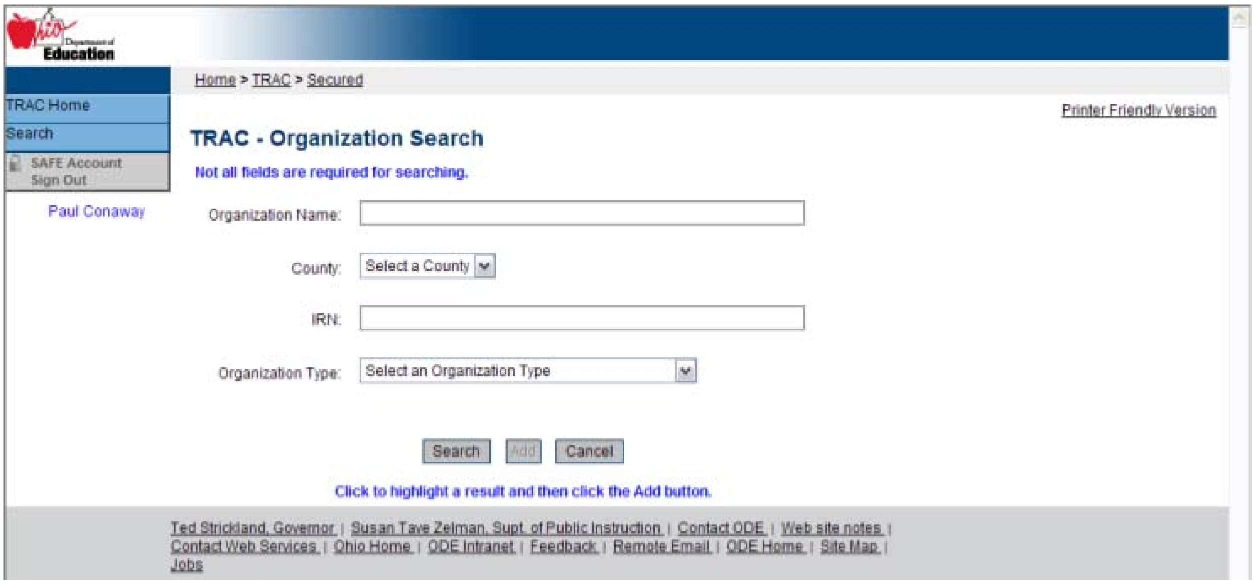


5.3. Organization Search

A valid OEDS organization must be found before participants can be added to a TA activity.

The organization search page can be reached by these two methods.

1. Click **Add Participant** link. Click '**click here to search for a new participant'** link. Search for a participant. Select a participant from the list and then click **'Search for Organization'** link.
2. Click **Add by Organization** link. Click **'Search for Org'** link.



The Organization Search page will search all Organizations in OEDS. It is critical to limit your search when possible. If the result set is too big TRAC will return with an error.

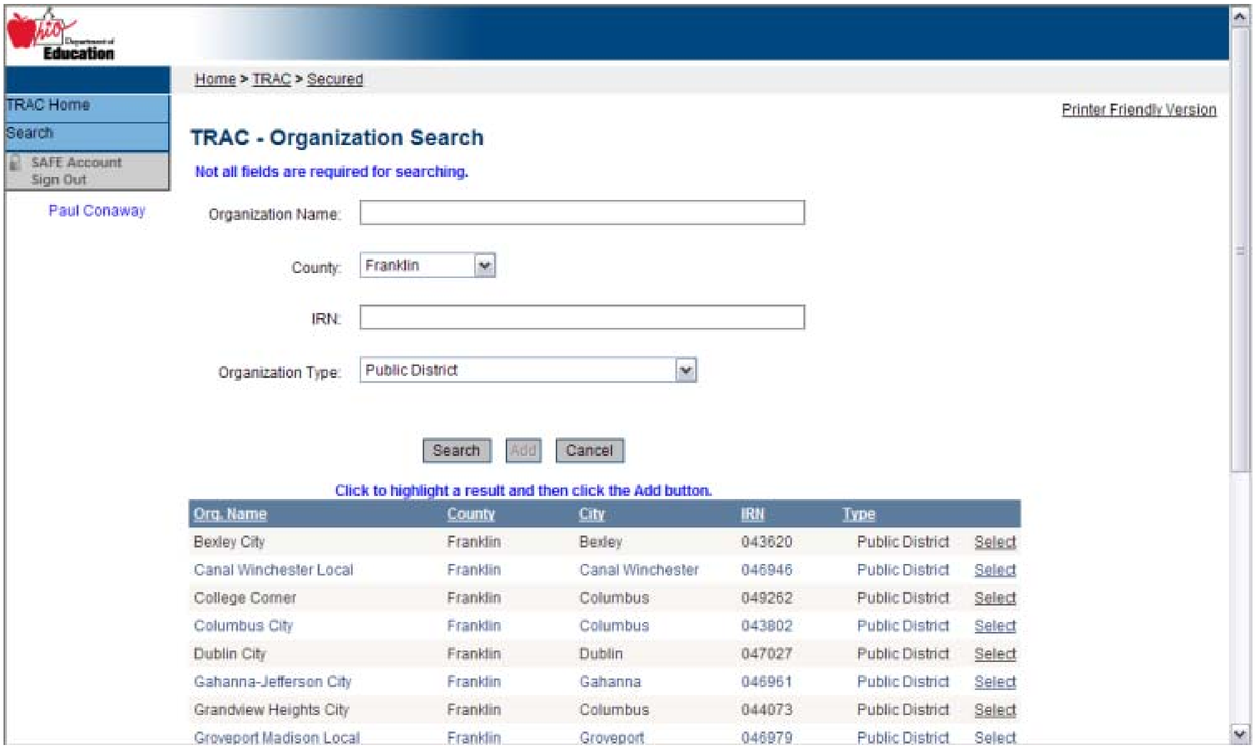
Organization Name – Enter the organization name of the Organization you are searching for.

County – Pick a county the Organization resides in from the drop down list.

IRN – Enter the IRN of the Organization you are searching for.

Organization Type – Pick the appropriate Organization Type from the drop down list.

An example search: Select **Franklin** from the county drop-down list. Then select **Public District** from the Organization type drop down. This search will display all the public districts in Franklin County.



Click the **Select** link to highlight the correct organization.

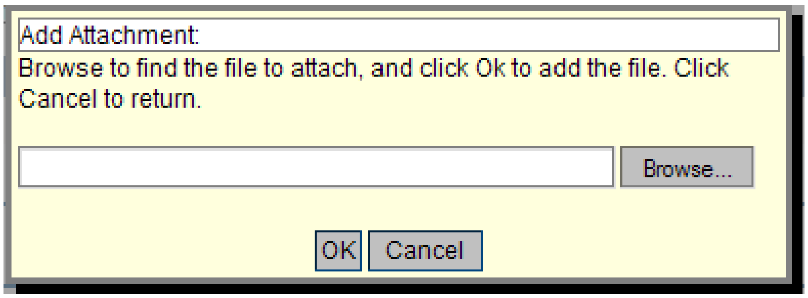
Click the **Add** button to select the organization chosen. You are returned to the correct page, either the **Add by Organization** page or the **Participant Edit** page.

6. Attachments Section

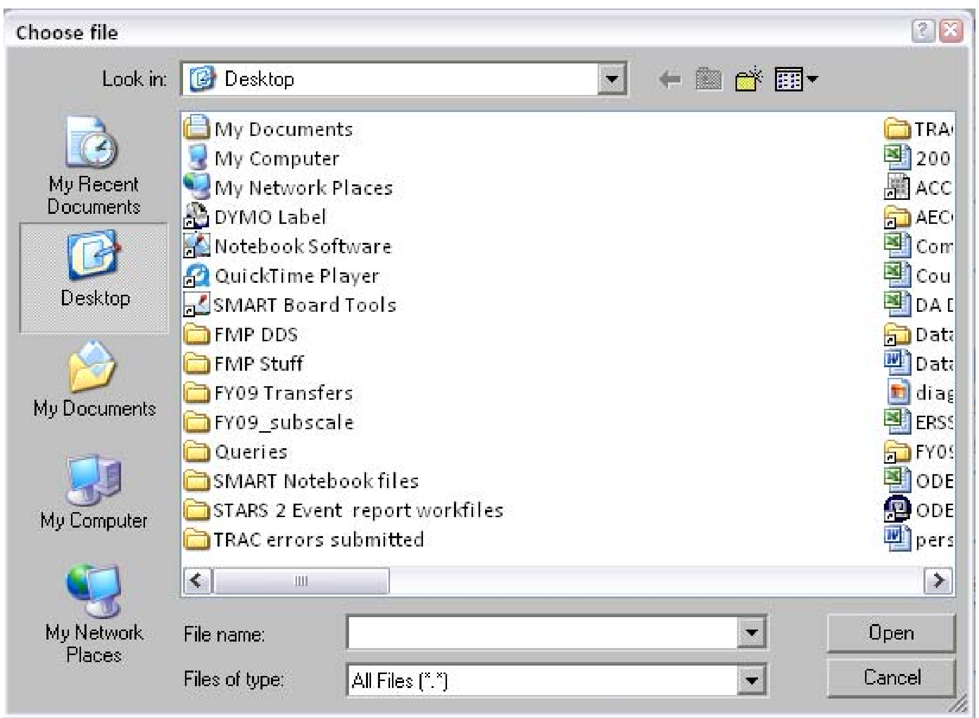
Meeting agendas and other meetings related documents can be added as attachments to a TA activity.

6.1. Adding Attachments

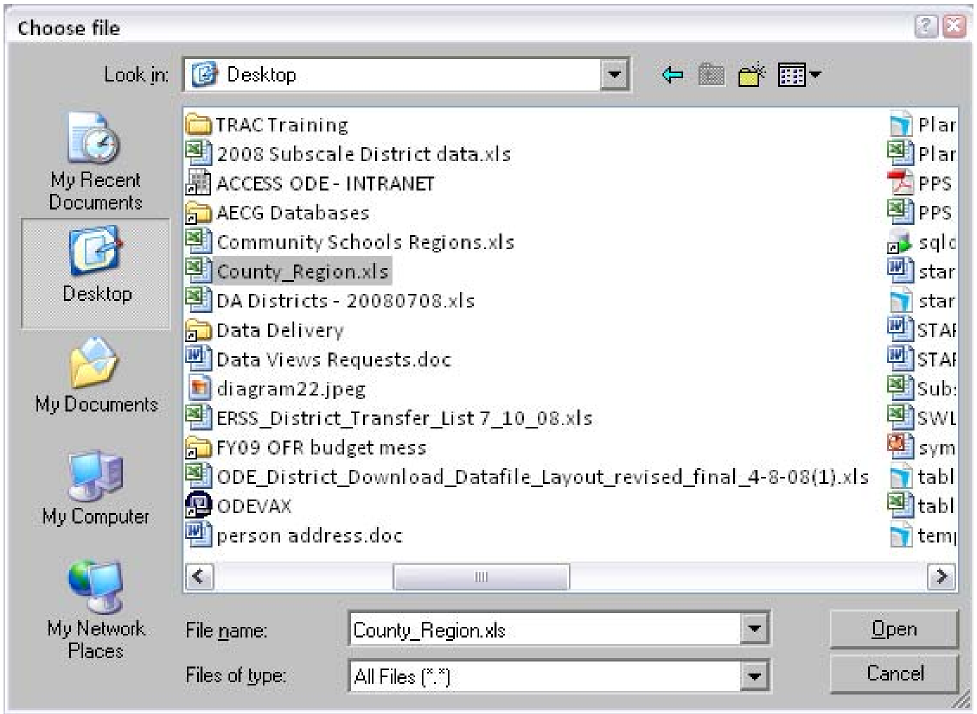
Click the **Add Attachment** link in the Attachments section of the TRAC Contact View screen.



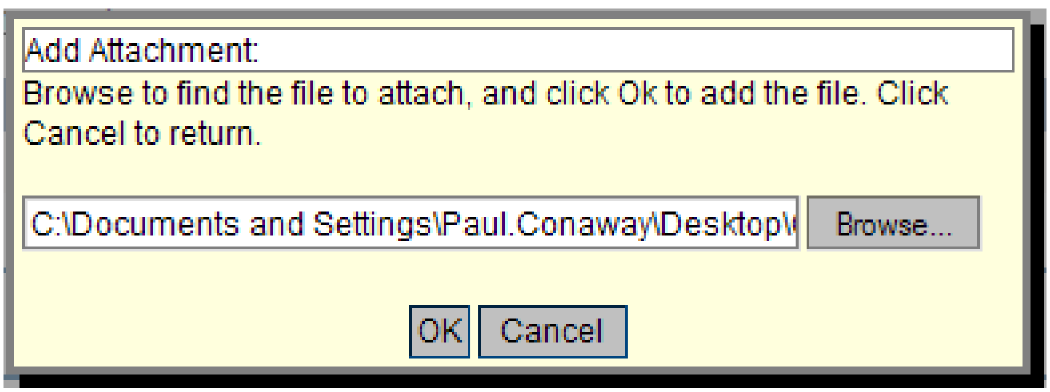
Click the **Browse** button to bring up the Choose File dialog box



Navigate to the file that you want to add as an attachment. Select the file from so that the file name appears in the file name text box. Only one file can be attached at a time. Repeat the process for each file to be attached.

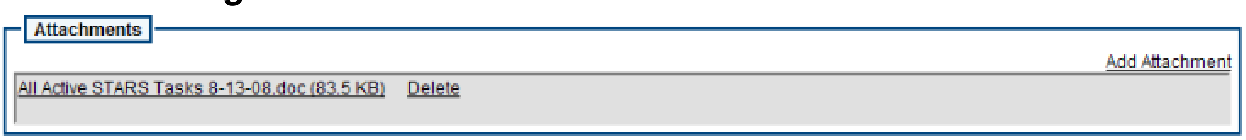


Click the **Open** button to add the file to return to the Add attachment pop-up window.

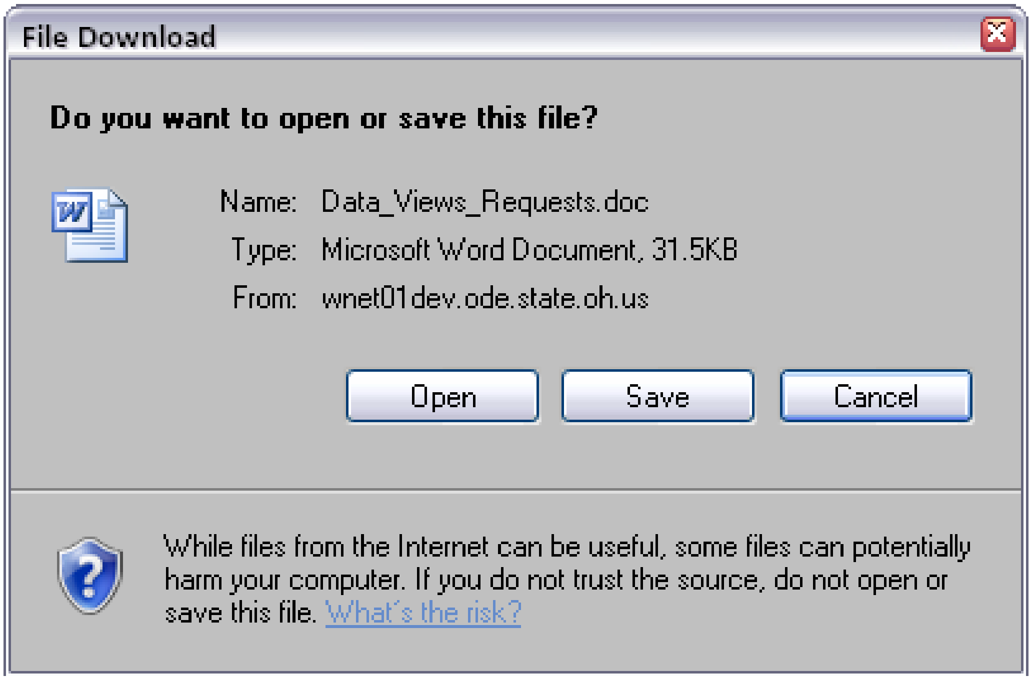


Click on the **OK** button to add the file to the TA activity.

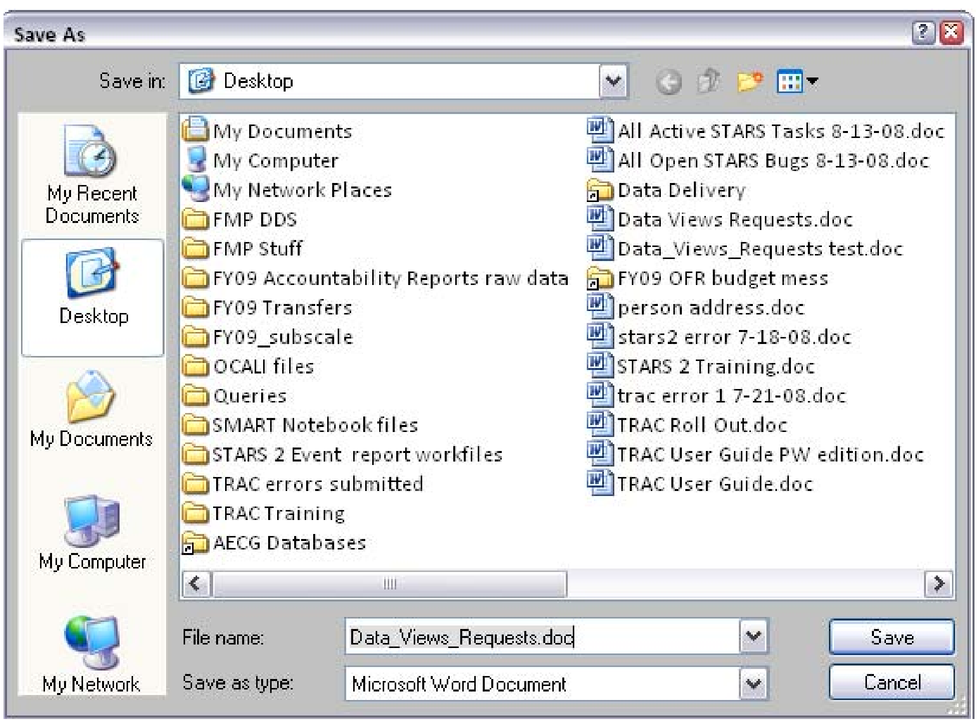
6.2. Viewing Attachments



To view an attachment click on the document link in the attachment section. This will bring up a dialog box.



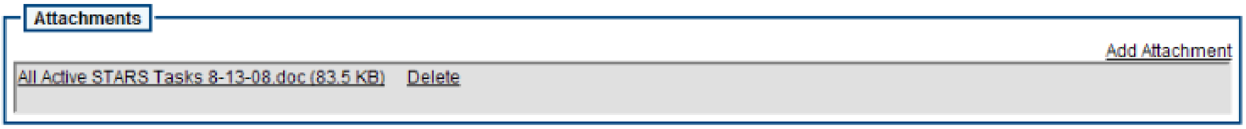
Click the **Open** button to open the document or the **Save** button to save the document to your local disk drive. Upon clicked the **Save** button the user will be presented with another dialog box.



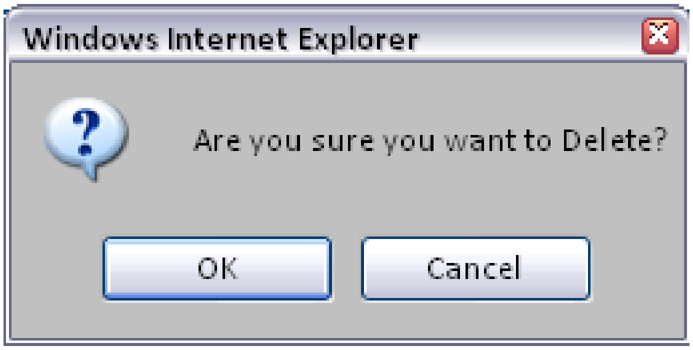
Navigate to your desktop and then click the **Save** button to save the document to the desktop.

6.3. Removing Attachments

To remote an attached document from the TA activity. Click on the **Delete** link next to the document that is to be removed.



A dialog box appears asking **"Are you sure you want to Delete?"** click **OK** button to remove the document from the TA activity. Click the **Cancel** button to abort the removal process.

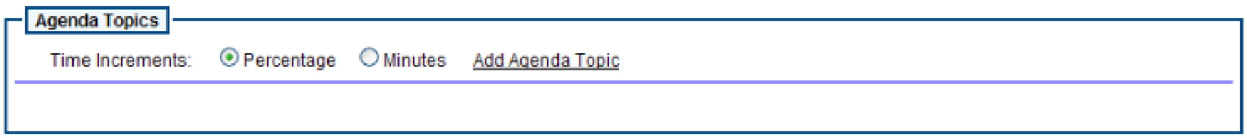


The document is removed from the attachment section.

7. Agenda Topic/Notes Section

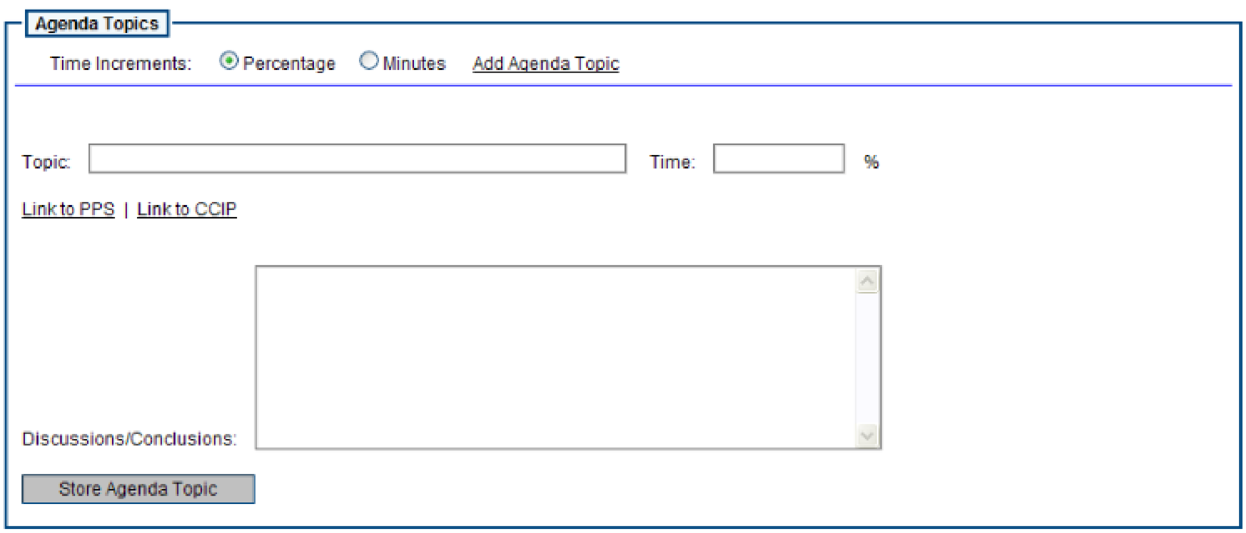
Formal TA activities (In-Person Meeting, Conference Call, and Web Meeting) have Agenda Topics, informal TA activities (Informal In-Person, Phone Call, Email) activities have a Notes field. Attachments are stored at the TA activity level not at the Agenda Topic level.

7.1. Entering Agenda Topics



Formal TA activities can have multiple agenda topics. When entering agenda topics the time increments can be entered as a percentage of total time or a specific number of minutes. This is determined by selecting the appropriate radio button at the top of Agenda topics section.

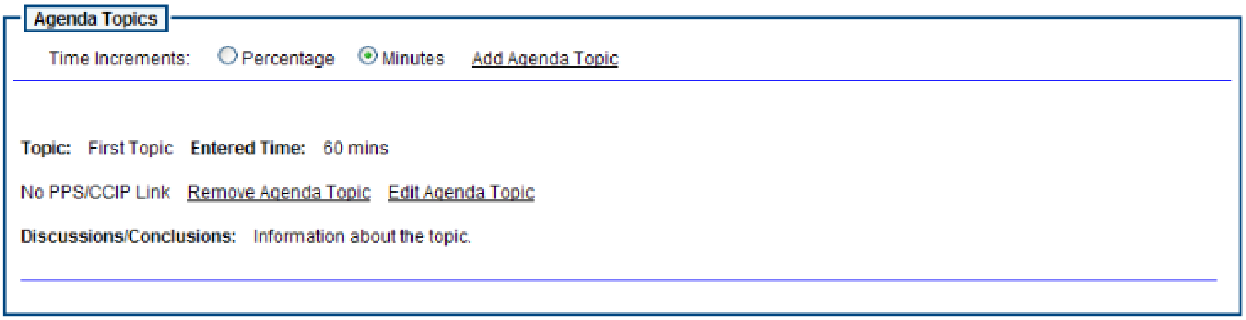
Click on the **Add Agenda Topic** link to create the first agenda topic.



The section expands to allow entry of the specifics about the agenda topic.

- Topic – Title of the Agenda Topic goes in this field **Required**
- Time – Enter either a percentage of total time or a specific number of minutes of duration for this Agenda Topic. The value is determined by which of the radio buttons is checked at the top of the Agenda Topics section. The default is percentage. **Required**
- Link to PPS – Select the appropriate PPS to link the Agenda Topic. The list is based on the active PPSs that the current user's Organization to has access to. Scroll though the list and highlight the PPS to link to the Agenda Topic. The PPS link can only be removed after the Agenda Topic has been stored.
- Link to CCIP – This feature has not been implemented yet.
- Discussions/Conclusions – Enter informative text to capture the discussion and or conclusions made around this Agenda Topic.

Click the **Store Agenda Topic** button to finish saving the agenda topic.



Repeat the above process for each agenda topic in the TA activity.

7.2. Editing Agenda Topics

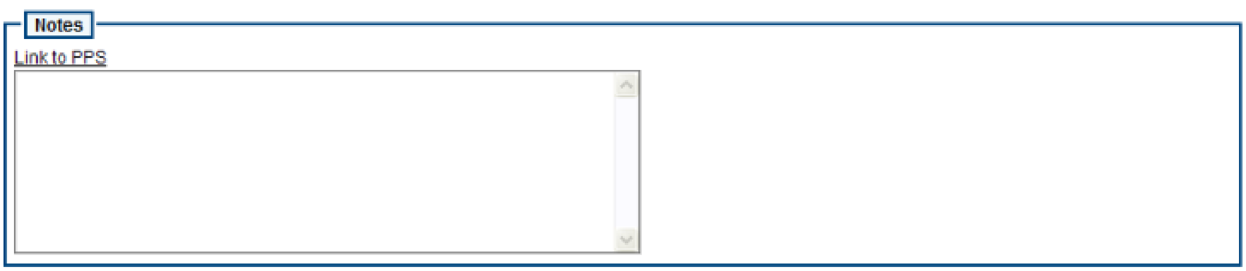
Click on the **Edit Agenda Topic** link to bring up the topic to allow for editing. PPS links can be removed at this time. Edit the Agenda Topic as needed then click the **Store Agenda Topic** to save the changes to the topic.

7.3. Removing Agenda topics

Click on the **Remove Agenda Topic** link to remove the agenda topic from the TA activity. The removed Agenda Topic must be reentered if this link was clicked on by mistake.

7.4. Entering Notes

The notes section is only available for informal TA activity types. (Informal In-Person, Phone Call, and Email).



Enter notes in the text box provided.

Click the **Link to PPS** to link the notes to a specific PPS.

8. Search Contacts

There are two search screens. Click on either the **Simple Search** tab and the **Advanced Search** tab, the tab to select the appropriate search screen.

8.1. Simple Search Tab

On the Simple Search tab type in the search criteria in the meeting subject text box. This text box searches the contents of the Meeting Title field, the last name of any participants and the Keywords field. Click the **Search** button to start the search. The search results will appear below the search button. See the Working with Search Results section below for details on interacting with the search results.

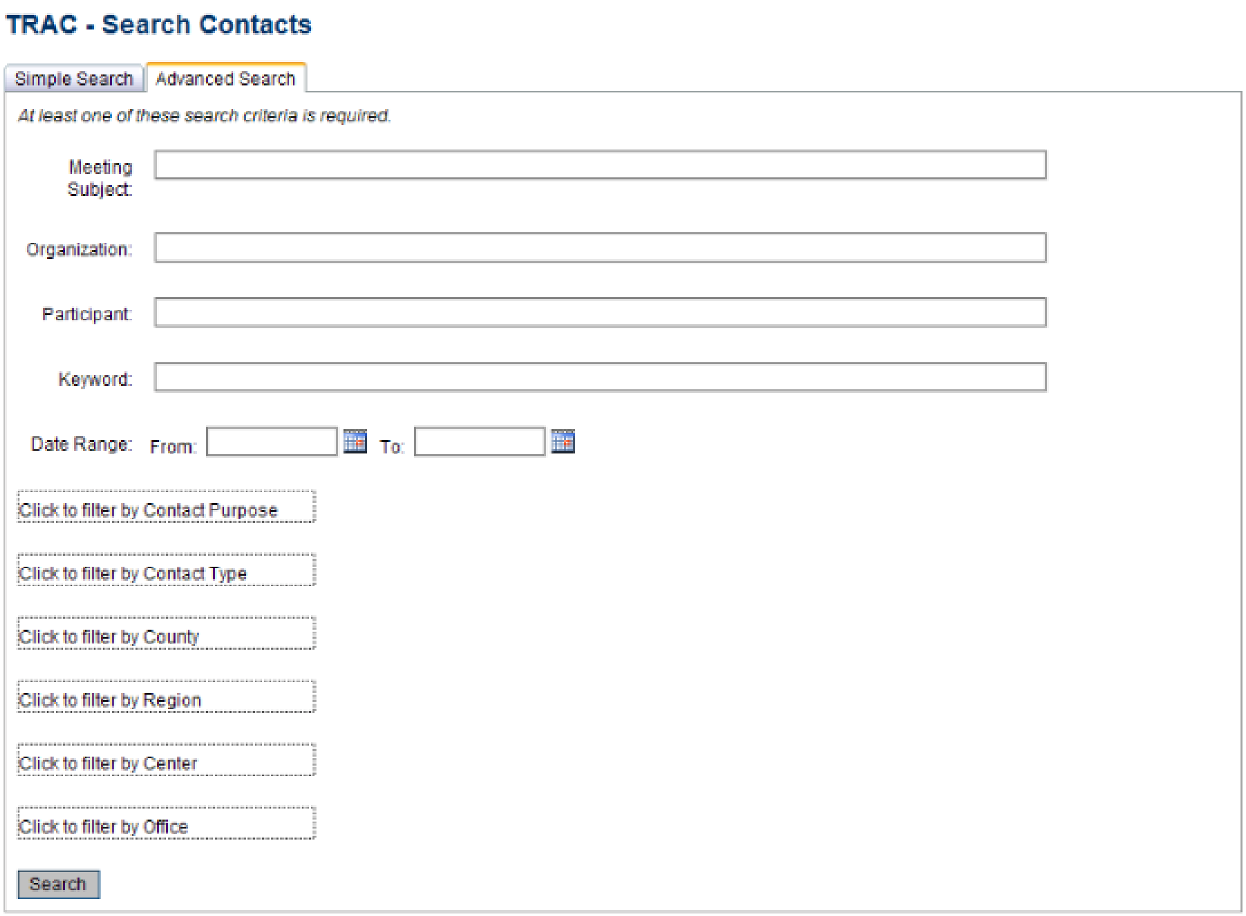
Clicking the **Clear Results** button clears the search results and allows for another search.

Use the advanced search tab for a more detailed search.

8.2. Advanced Search tab

The Advanced Search tab allows for multiple search criteria. Once all the search criteria has been entered click the **Search** button at the bottom of the screen to start the search. Results will appear below the Search button. See the Working with Search Results section below for details on interacting with the search results.

Click the **Clear Results** button to clear out the search results to begin another search.



- Meeting Subject – Text placed in this field will be matched against the Meeting Title Field.
- Organization - enter the name of the Organization to search for TA activities by Organization.
- Participant - enter the name of the participant to search for TA activities by participant name.
- Keyword - enter the keywords in this textbox to search for TA activities that have a matching keyword.
- Date Range – Enter the date range to search for all TA activities between the dates that are entered. The dates can be typed in or chosen from the calendar date pickers.

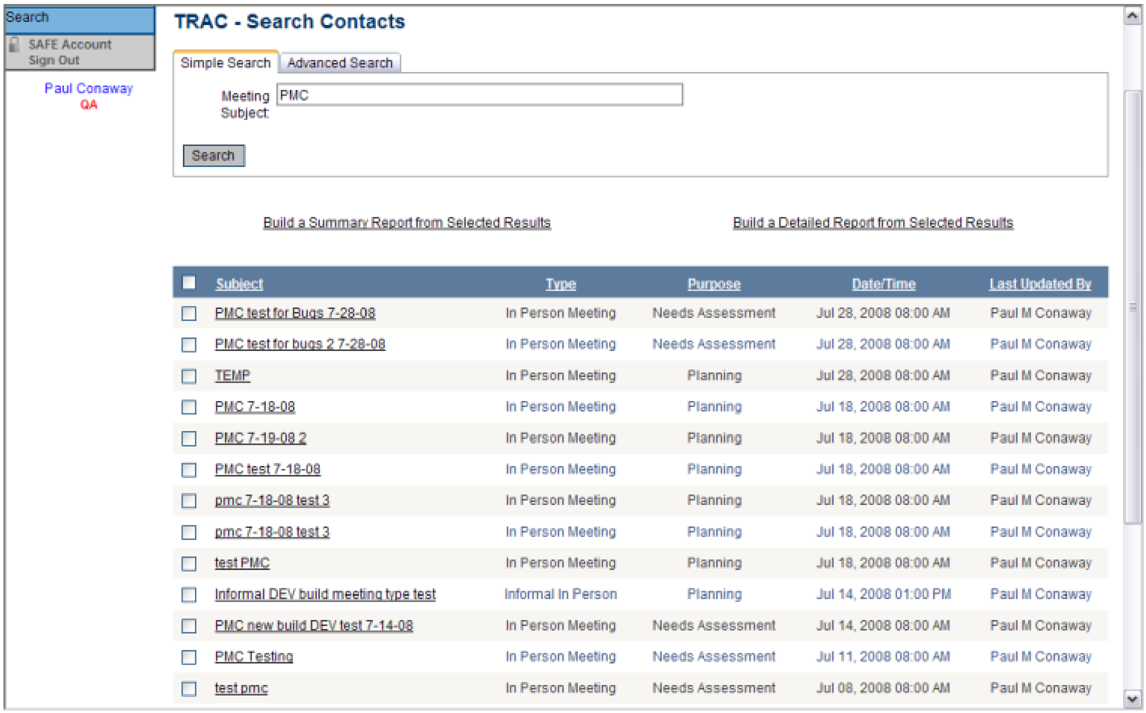
The remaining search criterion fields are hidden behind the **Click to filter by** boxes. To expand a search criterion box click inside the box. The figure below has the **Contact Purpose** filter expanded. Click on the drop down menu to select the contact purpose to search by.

- Contact type – Click on the checkboxes to limit your search results by specific TA activity types
- County – To limit your search by the counties entered in the contact summary section of a TA activity. To select a specific county highlight the county on the left hand side list and then click the **>>** button to move the county to the right hand side list. Repeat this process for each county to be included in the search.

- Region – Click on the drop down menu to select the region to filter the results on. This filter will only find TA activities that had a region entered in the Contact summary section of the TA activity.
- Center – Click on the drop down menu to select the Ohio Department of Education center to filter your results on the center selected. This is only applicable to TA activities created by Ohio Department of Education personnel.
- Office – Click on the drop down menu to select the Ohio Department of Education office to filter your results on the office selected. This is only applicable to TA activities created by Ohio Department of Education personnel.

8.3. Working with Search Results

The figure below shows a set of search results.



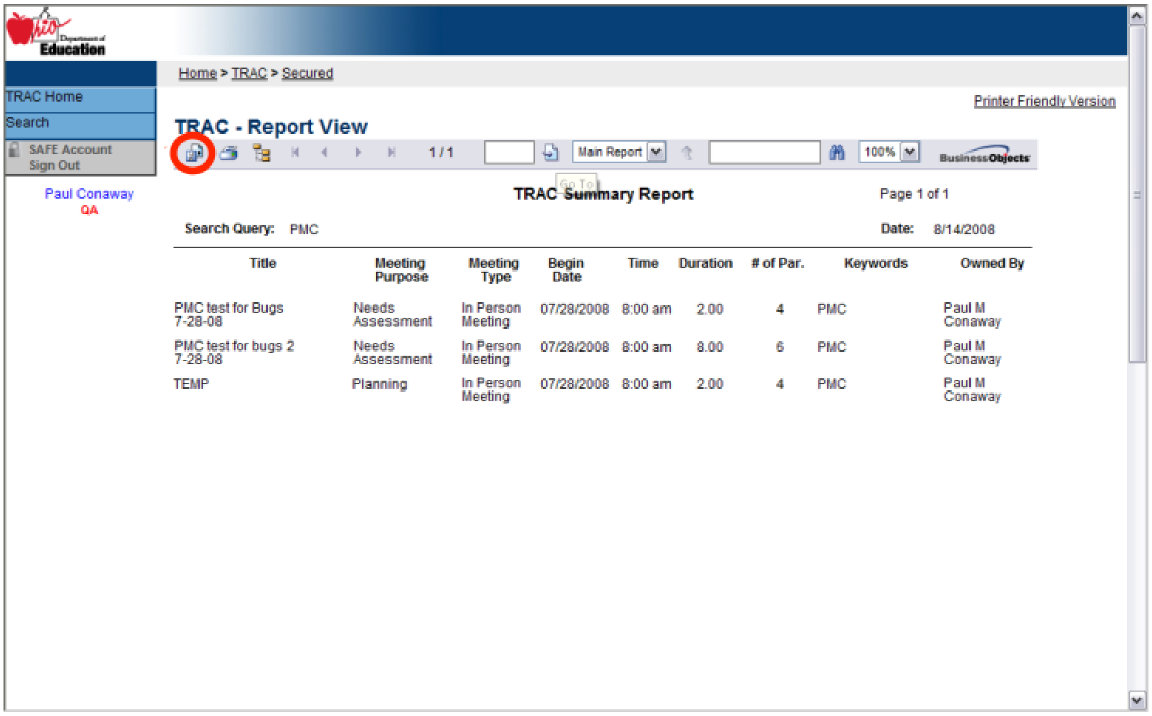
The search results can be used to create either a Summary or Detailed report. The search results also can be used to edit a previously saved TA activity. Only the TA activity owner and creator can edit the activity after it has been saved. To edit a TA activity click on the **TA Activity title** under the subject column. If the current user doesn't have the rights to edit the activity all the fields will be read only. Make the appropriate changes to the activity and then click the **Save Meeting** button to save the changes.

Each of the column headings can be clicked on to sort the search results by that column. Clicking once on the column will sort the items in descending order, clicking on the column again will sort the results in ascending order.

8.3.1. Creating a Summary Report based on Search Results

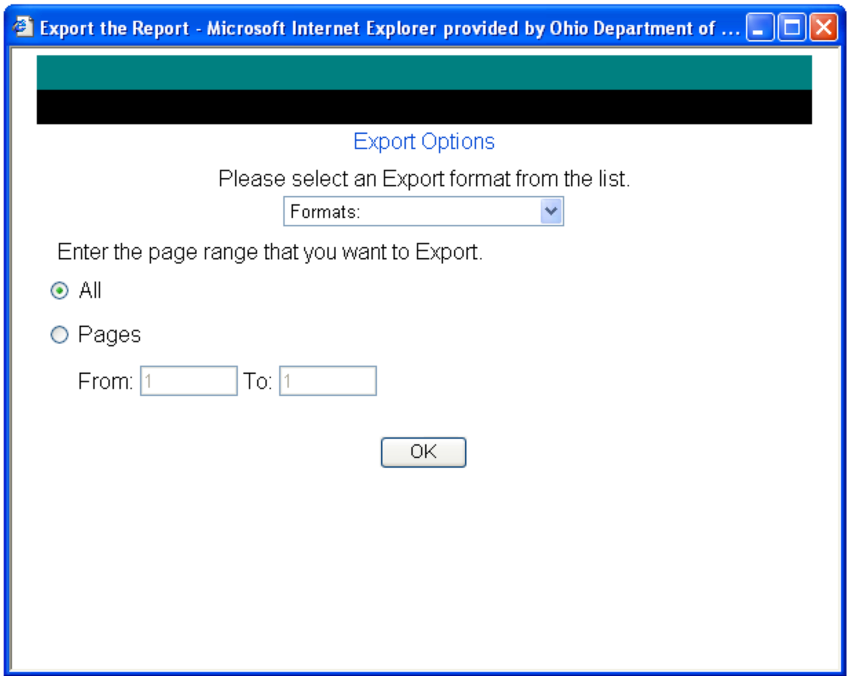
To create a summary report based on the search results select the items to be included in the report by clicking the checkbox to the left of the subject column. Only the results that are checked will appear in the summary report. Click on the checkbox in the header column to select all the search results

Click on **Build a Summary Report from Select Results** to create the summary report.



The figure above is an example summary report. Click on the Printer icon to print a copy of the report to a printer. To export this report to a file Click on the “**Export”** button in the top left corner of the screen.

The export options screen will appear. Select the format to export the report to and the pages to export. Click the **OK** button to export the data in the format specified. The exported data will be opened in the format that was selected. The file created can then be saved to the computer or a drive attached to the computer.

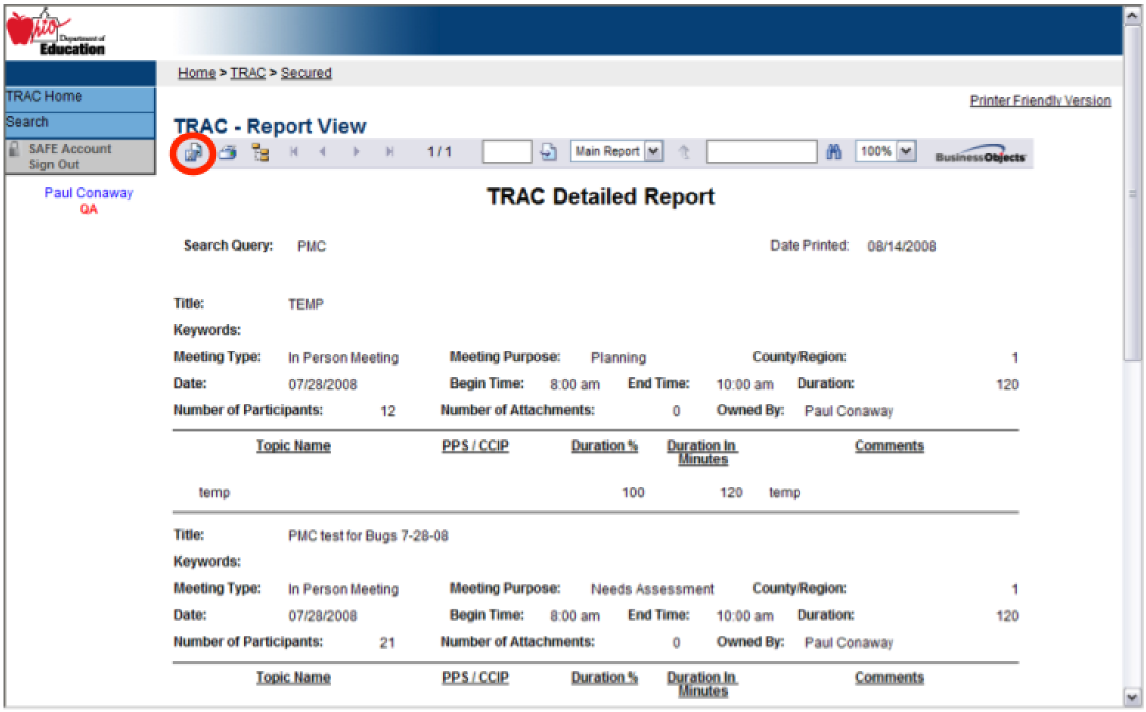


After clicking the “Search” button, the results of the search will be displayed in a list at the bottom of the screen.

8.3.2. Creating a Detailed Report based on Search Results

To create a detailed report based on the search results select the items to be included in the report by clicking the checkbox to the left of the subject column. Only the results that are checked will appear in the detailed report. Click on the checkbox in the header column to select all the search results

Click on **Build a Detailed Report from Select Results** to create the detailed report.



The figure above is an example detailed report. Click on the Printer icon to print a copy of the report to a printer. To export this report to a file Click on the "**Export"** button in the top left corner of the screen.

The export options screen will appear. Select the format to export the report to and the pages to export. Click the **OK** button to export the data in the format specified. The exported data will be opened in the format that was selected. The file created can then be saved to the computer or a drive attached to the computer. If any of the TA activities included in the report contain attachments these will have to be printed separately.