

Docs

- The Set Up
 - As a SysAdmin – Go to the Trac Navigation -> Tracman Icon -> Utilities and Prefs -> Advance Prefs Tab -> Enter ‘documentPostTypes’ in the search bar -> Click on documentPostTypes -> Enter in your list of document types -> Save
 - Example for Tutor Files
 - Tutor Application
 - Tutor Recommendation
 - Tutor FERPA
 - Tutor Observation/Self Evaluation
 - Tutor CRLA Certificate
 - Tutor No Show Report
 - Tutor Diversity Reflection
 - Tutor Handbook Response
 - Example for Notes
 - Student Documents
 - Consultant Notes
 - As a SysAdmin – Go to the Trac Navigation -> Search Glass -> Center Profile -> click on your Profile -> Group Access Tab -> Click on the group which will have posting responsibilities -> Scroll down to Post Doc Types and click on the drop down arrow then choose all documents appropriate for this group -> Save
 - *Continue for all Groups needing document posting responsibilities*
- Uploading Documents
 - Login with document posting rights – Go to Trac Navigation -> Search Glass -> Center Profile -> click on your Profile -> Consultants Tab -> choose the specific consultant -> Docs Tab -> click on ‘upload’ -> select type of document from list, hover mouse over ‘choose file for upload’ then click on ‘browse’ and select the document -> Save -> Save Consultant
 - Note: Consultants Tab, located between Group Access Tab and Sections Tab, may have a customized name for your Profile.*

Certifications

- The Set Up
 - As an Admin – Go to Trac Navigation -> Search Glass -> Center Profile -> click on your Profile -> Consultants Tab -> choose the specific consultant -> Certifications Tab -> click on ‘create new’ -> determine whatever dates, type, description information specific to your program -> Save -> Save Consultant

Note: Consultants Tab, located between Group Access Tab and Sections Tab, may have a customized name for your Profile.
 - Example for CRLA requirements
 - Foundations Training (FND TRN)
 - All-Tutor Training (ALL TRN)
 - Student Accessibility Training (SAS TRN)
 - Diversity Training (DIV TRN)
 - Observation (OBS)
 - One-on-One (ONE)
 - 25 Hours (25 HRS)
 - CRLA Certified (CRLA)
 - Examples of other roles
 - Math and Science Tutor (MSC TUTOR)
 - Lead Tutor (LEAD TUTOR)
- Pulling Reports
 - Login with reporting rights – Go to Trac Navigation -> Tracman Icon -> Reports -> select ‘Other’ from drop down, choose ‘Consultant Certification Hours’ and pick the correct center from the drop down choices, the range of dates, the certification type, and any additional information you may be interested in being added to the report -> click ‘Generate’

Note: If you check the box next to ‘only include consultants with certifications’ the report will generate a list of only those who have completed at least one element of the certification.

Also note: If you click on ‘Consultants’ and choose ‘Active’ only those active consultants will appear in the list, ‘Inactive’ will list only those inactive consultants, and ‘Blank’ will list all consultants completing any aspect of certification at any time.