Trace

Assessor Guide

Applicable for Sharpen360 Trace version 5.0+

Revision 1

Sharpen360
Knowledge Worker Tools

Table of Content

1 Introduction

Thank you for using our Process Assessment Tool, Sharpen360 *Trace*.

This document describes the configuration options of *Trace*. We try to use a precise naming of concepts in Trace. Please see chapter 2 for our list of Terms and Definitions.

If you have questions, have ideas that you would like to discuss, or just need an introduction to specific parts of *Trace*, please contact us!

Also, we would very much appreciate if you would report any bug or inconvenience you might find. Please use the email below, and add screenshots and descriptions as needed and we will immediately prioritize this.

Use support@sharpen360.com as much as you like. You are welcome!

The Sharpen360 Team.

PS: Please help us by sharing knowledge about Trace to your colleagues, network, family, friends, neighbors, mother, or anybody else interested 😊

2 Terms and Concepts

Term	Chapter	Definition
Assessment Project		"Assessment Projects" are used to organize assessments in a group having different access levels for different Users.
Evidence	10	"Evidence" is the term used for work products of any kind presented by the project being. Examples are design documents, requirements, models, and issues. Evidence can be provided before or during interview sessions.
Evidence Inventory	10	"Evidence Inventory" is the mechanism in *Trace* supporting registration of Evidence. Evidences are assigned a unique id within the assessment and can be referred from Records. *Trace* keeps track of references to each individual Evidence, generates evidence lists per process for reporting, and maintains mappings from the Records where the Evidence is referred.
Grid view	7	The "Grid view" tab in *Trace* provides an "Excel like" view of PAM, Evidences and Records. Alternative is "Tree view"
Indicator		Used as a common term for Base Practices (BPs) and Generic Practices (GPs).
Indicator Annotation (IA)	14	"Indicator Annotation" is the term used for an annotation added to an Indicator. IAs are organized by "Overlays" and can have either personal or project scope.
Schedule Tab	5	Schedule Tab is used to create interview sessions and associate interviewees to the interview session.
Instance	3	"Instance" is the term used when the same process is applied in different process instances within the same project, e.g. when one part of the project is doing agile development and the other part is not. *Trace* supports this scenario by being able to define one or more Instances within the same assessment. Defining Instances is done as part of "Plan Assessment".
Tree view	6	The "Tree view" tab in *Trace* provides an "Tree like" view of PAM with Evidences and Records. Alternative is "Grid view"
Notes / Notepad	12	"Notepad" is a mechanism to handle unstructured notes, typically during interview sessions. Please note that creating references to Evidence will work from Notepads. The notes can be copied into Records after or during the interview sessions.
Guideline	13	"Guideline" is the term used for rules and recommendations specifying relations between PAM indicators.
Overlay	14	An "Overlay" is a container of "Indicator Annotations" and "Record Templates" which can be used to support the Assessor.
Process Assessment Model (PAM)		A "Process Assessment Model" defines processes, attributes, outcomes, and Indicators which is used when performing Assessments. Various PAMs are available and all ISO33000 compliant PAMs can be loaded into *Trace*.
Record	11	"Record" is the term used for any registration done by the assessor(s). Six types of Records exist: "Strength", "Weakness", "Recommendation",

		"Observation", "Comment", and "Question". Records can refer to zero, one, or more "Evidences".
Record Template (RT)	15	"Record Template" is a mechanism to create standardized Records which may be reused (by copy) across multiple Assessments. RTs are organized by "Overlays" and can have either personal or project scope.
Report	9	"Report" is the term used when Assessment data is extracted into Word, PowerPoint, or Excel using a specific "Report Template".
Report Template	9	"Report Templates" are used for generating "Reports". *Trace* has several build-in "Report Templates" which can be tailored into customer-specific formats.
Scope	4	Scope Tab can be used to decide the scope of the assessment by creating instance, allocating PAMs, processes and guidelines.
Trace Assessor Assistant (TAA)	13	Trace Assessor Assistant (TAA) support the Assessor by evaluating Guidelines based at a set of predefined evaluation rules. Sharpen360 has defines these evaluation rules for all VDA ASPICE Guidelines.
Workspace	7	"Workspace" is the mechanism in *Trace* making it possible to group Records into multiple "sets", e.g. by having one group or "miniteam" of assessors registering Records in one Workspace and another group of Assessors registering Records in another Workspace. Also, the process of consolidating and agreeing on Records can be supported by having a "Consolidated" workspace.

3 Plan Assessment

Create an Assessment:
Assessments are created from the *Trace* overview page that lists all assessments created. When the assessment is created, a name must be entered, and a Process Assess Model must be selected, e.g. ASPICE 3.1.

To plan and execute an assessment, the row in the overview window must be double-clicked.

Plan an Assessment:

To plan a specific assessment, please perform the following steps:
1. **Enter Assessment information** in the text fields, the texts are saved automatically when leaving focus from the field.
   a. **Project ID & Project Name**: Used to group assessments for Trace Project Assessment History v1.0 report.
   b. **Ticket Project**: Used for Jira Integration
2. **Create Participants** including Lead Assessor, Assessor(s), and Interviewees/Interviewee groups.
   Remember to use the "Search button" when adding Assessor(s).
3. **Create Workspaces** for creating and managing workspaces. Please see description in "2: Terms and Concepts" for further explanation. Please note that when generating Word and Powerpoint assessment reports, only the Records for the actual selected workspace will be extracted. This is useful for e.g. generating the consolidated and agreed set of Records.

Tips and Tricks
- Create a short name for Lead Assessor and each Assessors. This will show up as tags in the Records and tables and make it easy to identify who created the Record.

4 Scope

In this section, scope of the assessment such as allocated PAMs, allocated processes, instances can be changed

The following numbers refer to the orange dots in image above.

1. **Create Instances** as needed. "Main Project" is created by default. Double click to change!
2. **Allocate one or more Processes to each Instance**. Select a PAM or add a PAM to insert a process from, check the instance to allocate process to, and select the Target Capability Level for the process. Then press "Add" button to allocate the process. Also, processes can be searched from Search text box. Please note that this step is a prerequisite for creating Evidences and Records.
3. **Select Assessment Scope**. Modify assigned processes and its target capability levels. Note: allocated process with ratings and records cannot be unallocated.
4. **Assign Guideline(s)** if available and needed, select applicable environments by checking the checkbox.
5. **Assign Map Sets** to use Map Sets for Overlay.
6. **Invitation Word Report** and Evidence List Excel report can be downloaded.

Tips and Tricks

- Please note that the Instance "Main Project" is created by default. This instance may be renamed if needed.
- Remember to allocate one or more processes to the instances. If not, no processes will appear in the other tabs of *Trace*

5 Schedule

Schedule Page provide functionality to schedule interview sessions with interviewees.

Interview Sessions will be automatically pre-filled with each allocated processes from Scope Page.

The following numbers refer to the orange dots in image above and below.

1. Check the checkbox in "**New Day**" column to start new interview day
2. Click and change the **date** of the interview session
3. Edit the **duration** of the interview session
4. Set **start time** of the session and all sessions below will be calculated according to their duration.
5. **Interviewee** can be added from the right Interviewees panel.
6. Interviewee can be assigned to Interview session by double clicking a session and opening following window and clicking the plus button.

Tips and Tricks
- Multiple sessions can be merged into one session and split into multiple session
- Break and consolidation can be inserted by buttons
- Orders of the session can be reordered by drag & drop

6 Tree view

The Tree view provides a list-oriented view of PAM and Records.

The following numbers refer to the orange dots in image above:

1. Select between Instances (if you have more than one). The selected instance is yellow in PAM tree.
2. Window with tree structure of PAM, details below.
3. Records for the selected PAM part (here SWE.1.BP1)
4. Evidence Inventory where documents are defined.
5. Currently selected PAM part highlighted with yellow
6. Filter mechanism for Records
7. Various functions (hover in Trace to see explanation):
   - Create Record (alternative to pressing crowsq)
   - Search PAM work product characteristics
   - Configuring Overlays
   - Validate Selected Process
   - Open window with all Guidelines in scope Details of PAM which is selected in (5)
   - Show Graphs when selecting PAM nodes: top node, process nodes, and Group/PA nodes
   - Open Ticket Status window

Tips and Tricks
- You can toggle the "General" and "Presentation" attributes by selecting a Record and hitting shortcut: "g" or "p".

- If having more than one Instance, a specific Instance can be selected using the drop-down menu in the top bar (1 in picture). Selected Instance is highlighted above the associated indicator ratings in the PAM tree. Please note that the list of Records is filtered to show only Records for the selected instance.
- Select a specific indicator (BP) to show the associated model text (Assessment tree), the associated Guidelines (not shown), and Records.
- Rate BP's and PA's by selecting the node, press <return>, and arrows left and right to select a rating.
- Guidelines are available in the button of the model browser when a specific Indicator is selected. Please see chapter 9 to understand how the rating rules mechanism is used.
- Records in a specific Assessment are automatically synchronized across all assessors' browsers, e.g. when a new Record is created, or a Record is deleted.

7 Grid View

The Tree view provides a list-oriented view of PAM and Records.

The following numbers refer to the orange dots in image above:

1. Select between Instances (if you have more than one).
2. Select Workspace to create Records in.
3. Various functions (hover in Trace to see explanation):
   - Create Record (alternative to pressing crowsq)

- Open Evidence Inventory
- Open Notepad, useful when doing "unstructured interviews"
- Search PAM work product characteristics
- Search and skip to an Indicator in the grid view with ID of indicator.
- Configuring Overlays
- Validate Selected Process
- Open window with all Guidelines in scope Details of PAM which is selected in (5)
- Show Graphs when selecting PAM nodes: top node, process nodes, and Group/PA nodes
- Open Ticket Status window

4. Filtering records to show in the Grid view. Filters avoidable:

a. Record Types (e.g. Weakness, Comment, Observation)
b. General or Presentation Records
c. Search texts in records
d. More filtering options: filtering by Workspace, Creator, Modifier, linked Evidence.
e. Clear all filtering

5. List of Process Area selector to switch the indicators shown in the Grid view.

How do I create Records?
- Select a process using the left buttons, e. g. SWE.2
- Select an Indicator in table using arrow keys / mouse
- Create a Record by pressing one of keys: "crowsq"

How do I select and edit an existing Record?
- Select a Record by either by mouse clicking the record number or keying in the number which is displayed in the left part of the "Records" column
- Select the Record and press "e" to edit.
- Or just single-click the record text with your mouse (turns yellow when hovered, see image above).

How do I rate Indicators and Attributes?
- Select a row, press <return>, and use arrows left and right to select rating (blue underscore, see image)
- An indicative rating is shown, when possible (i.e. if all Indicators below a PA is rated)
- Multiple Indicators can be rated at once by selecting multiple indicators while pressing <shift> or <ctrl> or expand "Practice(s) chosen" and add indicators. (rating multiple Pas are not supported)
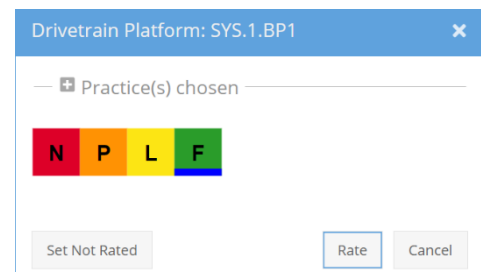
How do I use Workspaces?

- The tag for each record shows the Workspace where the record is saved.
- Records can be moved from their current Workspace to the target Workspace. Select the Record(s) and press "m".
- Create a copy of a Record Also, records can be copied to the target Workspace. To copy, select the relevant records, and press "d" key.

Tips and Tricks

- You can toggle the "General" and "Presentation" attributes by selecting a Record and hitting shortcut: "g" or "p".
- Guidelines are available by expanding the South panel named "Guidelines for…". Updates when an Indicator is selected. Also see chapter 9.
- Instance can be selected in the top bar of *Trace*. This filters the view and decides the default target Instance.
- Target Workspace can be selected in the top bar of *Trace*. This decides the target Workspace when moving and copying Records.
- Records in a specific Assessment are automatically synchronized across all assessors' browsers, e.g. when a new Record is created, or a Record is deleted.

8 Close tab

Close tab is used to change status of the Assessment and see the log of the assessment.

The following numbers refer to the orange dots in image above:

1. Shows current status of the Assessment
2. Status selector to change status of the Assessment. Select a status and click "Apply" to change status.
3. Shows history log of the Assessment.

Why must Assessments be closed?

- Assessment State is used to generate and filter relevant overviews, e.g. the "My Assessments" page
- Closed Assessments are included in extracted metrics, Open and Cancelled Assessments are not

What is the Assessment Log and how does it work?
- The Assessment Log shows important actions during the assessment, including "Open" and "Close" events
- Comments can be made by the Assessor into the log. These comments cannot be changed at a later point in time.

What is goes into the Assessment Log?
- **"Open":** when the assessment is created
- **"Close":** when the assessment is closed
- **"Comment":** when the assessor adds a comment to the assessment log
- **"Import":** when the assessment is imported (typically done when having performed an offline assessment)

9 Report

Report tab is used to access the reports for the assessment.

The following numbers refer to the orange dots in image above:

1. Download button the generate report.
2. Button to open previously generated reports. (Only show reports that are not downloaded. Downloaded reports are removed automatically)
3. Refresh button to refresh the list of reports. Used when report template is added or updated.

What Reports, and Presentations exist?
The following reports are available:

Report name	Description of content	Type
Detailed Assessment Outbriefing	Detailed outbriefing of the assessment where findings are presented per Instance -> Process -> Practice. Ratings are provided for all levels including CL/PA/BP/GP. Furthermore, the outbriefing includes Scope, General	PPT

	Findings, Participants, Considered Evindence per Instance, Detailed Graphs, and Justification of Guidelines.	
Strength/Weaknesses Assessment Outbriefing	Detailed outbriefing of the assessment where Strengths, Weaknesses, and Recommendations are presented per Process. Furthermore, the outbriefing includes Scope, General Findings, Participants, Total list of considered Evidence, Findings and CL Rating Results per Instance per Process, PA-level Graphs, and Justification of Guidelines.	PPT
Management Overview Outbriefing	Overview outbriefing of the assessment covering general Strengths, Weaknesses, and Recommendations. Furthermore, the outbriefing includes Scope, Various Graphs, and Justification of Guidelines.	PPT
Detailed Assessment Report	Detailed Report having an initial part where details about scope, participants, and general findings are presented. For each Instance a graph presents the rating results and then findings are presented per Process -> Practice. Higher levels are presented per process. Furthermore, referred Evidence is presented per Process as well.	Word
Record List	List of all Records and Record attributes for easy sorting, grouping, and searching. Furthermore, the Report provides Pivots and Charts to understand the distribution of findings against processes, finding types, and assessors.	Excel
Improvement Plan	Template for an improvement plan covering all weaknesses from the assessment. The improvement plan supports easy tracking of both progress against schedule and progress measured by closed weaknesses per process.	Excel
Percentage with Weights	This is an experimental Report where individual BPs of a PAM are assigned a weight to produce a weighted total score for each process depending at the rating and weight. By default, all weights are setup to 1. The idea is that this template can be used to support e.g. a potential analysis and better direct improvement efforts.	Excel

How does the reporting work?
MS Word and MS PowerPoint files are generated by inserting data from the assessment into template document.

Can different reporting templates be configured?
Yes, different reporting template can be defined and uploaded into the system. This makes it possible to change the generic templates to customer specific templates including colors, styles, logos, structure. Please contact Sharpen360 to see how this works.

Tips and Tricks
1. Please note that the generation of the reports might take some time, especially for Word report generation. The browser will wait until the report is generated and returned from the *Trace* server. For large reports (having many processes and findings) this could be a minute or two. Please have patience.
2. Please note that this tab has state/log mechanism where the assessment may be closed and reopened. Assessors may create log statements. Currently, the log is not extracted into the reports, but this will be an option later.

3. Please note that Workspaces can be used to filter which Records goes into the Reports.

10 About Evidence Inventory

What are Evidences and how are they used?
Please read about "Evidence" and "Evidence Inventory" in the "Important Terms and Definitions", Chapter 2.

How does the numbering of evidence work?
An Evidence is created by clicking "+" from the Evidence Inventory (1). This can be accessed from either the "Prepare" or "Conduct" tabs in *Trace*. Each Evidence is assigned an id (2). Each Id consists of a string representing a number series and an integer separated by a ".". The Id is unique within the assessment.

How do I refer an Evidence from a Record?
One or more Evidences can be referred from a Record. Click the orange icon or pressing the shortcut "**<CTRL><ALT> f**" when being in the text field in a record to refer an evidence from a Record.

Who refers which a specific Evidence?
The Evidence Repository list has a number showing the number of Records that are currently referring to a specific Evidence, please see (3) in the picture. To see a list of the all Records which refer the specific Evidence, click the number in column in (3).

Can Evidence be deleted?
Edit the Evidence and select the "Delete" button. But if the Evidence is referred, the system will refuse to delete the evidence until all references from Records are deleted. This helps the Assessors to maintain consistency across Records and Evidences.

Tips and Tricks
- Please see table in the next page for various shot-cuts etc.
- Evidence can be added from both Plan and Conduct tabs, and directly from the "Insert Evidence Reference" window.

- Evidence synchronization happens automatically, both between Plan and Conduct tabs, and between different Assessors being logged into the same assessment.
- You may organize your number series as you like.
    - One example would be to use number series aligned with the assigned processes, e.g. "ACQ.4" which will result with Id beginning with "ACQ.4.01".
    - Another example would be to use number series for e.g. all system engineering document (e.g. SYS), one for all planning document (e.g. PLN) etc.
- When a new Evidence in a number series is created, this series will be created and assigned the first, free number in the series (in this case 01).
- If the number series or Evidence name is changed by double-clicking the row in the Evidence Repository, all references are automatically updated and still works.
- Evidence is registered to a specific instance but can be referred across instances (to allow for shared evidence).
- Files can be uploaded as Evidences, if needed. Also, in a "bulk operation" using the "Upload file(s)" button. Just drag'n'drop the files from your explorer to the browser window to upload. In this way the evidence can easily be shared across assessors.
- Create references to Evidence from Records by using the shortcut: "<CTRL><ALT> + f".

11 About Records

What are Records and how are they used?

Symbol	Name	Used to
💬	**C**omment	Assessor notes / comments. Typically, not exported into reports.
☆	**R**ecommendation	Document actions or suggestions which would help the organization.
👁	**O**bservation	Document any observations during the Assessment.
👎	**W**eakness	Document a weakness (important when an Indicator is rated less than "F")
👍	**S**trength	Emphasize a practice exceeding the expectations of the PAM
❓	**Q**uestion	Question to interviewees. Typically identified during document review.

Records are the generic term for the registrations done by the Assessor when performing an assessment. The records are written statements, often referring to one or more Evidence. Records can be created before, during, or after assessment Interviews.

What types of Records exists?
Please see table to the right.

How do I create a Record?
Select a BP or GP node in the assessment tree and click "Create Record". Or use one of keys: "crowsq". The "Edit Record" window will open.

Record fields:

Field	Explanation
Practices	The related Indicators (BPs/GPs)
Search field	Used to multi-select Indicators, typically e.g. GP2.2.1
Type	See previous table, one of [CROWSQ], e.g. Weakness or Observation
General	These findings will be printed in the beginning of assessment report
Presentation	These findings can be filtered out for overview presentations
Instance	The Instance for which this Record was created.
Workspace	Workspace where Record is stored
Text field	Description of Assessment finding with references to Evidences

Creating references to Evidence from Records

- Refer to Evidence from the Record text by clicking the orange icon or the shortcut "**<CTRL><ALT> f**" when being in the text field. This will result in a pop-up window: "Search and Insert Evidence Reference".
- The reference mechanism will dynamically match and suggest Evidences based at both evidence id and name. Use <tab> to select.
- Select between Long = <name>[<id>] and Short references = [<id>].
- Create new Evidences from the "Search and Insert Evidence Reference" by selecting "New Evidence". This will allow for direct creation of an Evidence, which will be added to the Evidence repository and synchronized automatically.

12 About Notepads

What are Notepads and how are they used?

- Notepads can be used to write down notes during an Interview session.
- It is possible to work with zero, one or multiple Notepads
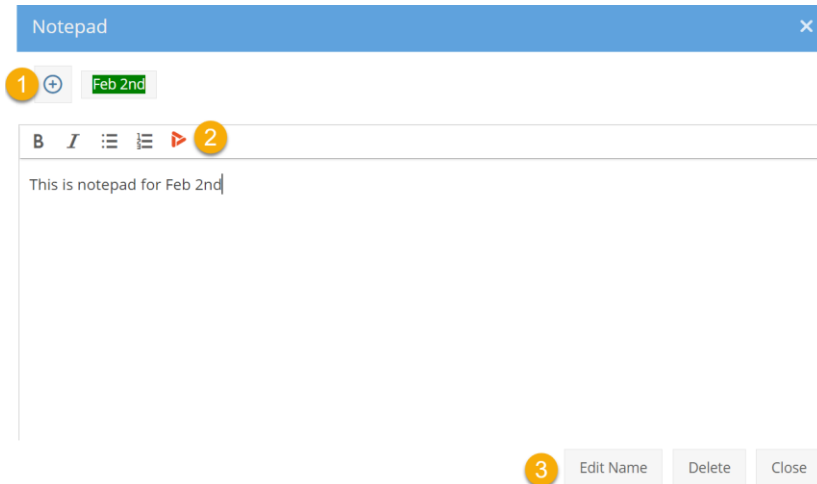
The following numbers refer to the orange dots in image above:

1. Button to select existing Notepads and ⊕ button to add new Notepad.
2. Button to insert evidence link into the text field.
3. Buttons to edit name of the Notepad, delete the Notepad, and close the window

Tips and Tricks

- Typically, Notepads are useful in interviews where it is not possible to create Records directly. Then, after the Interview, the notes can be used when creating Records.
- Evidence References can be used in Notepads (Use the shortcut: "<CTRL><ALT> + f"). Please note that the Evidence References will "survive" a copy of the text to a Record.

13 About Guidelines and Trace Assessor Assistant (TAA)

How does the automatic evaluation of Guidelines work?

A Guideline can be associated to zero, one, or more Indicators (BPs/GPs). When clicking at a specific node the "Guidelines" tab shows the corresponding Guidelines. Each time an Indicator is saved, the associated Guidelines are evaluated by Trace Assessor Assistant.

In the example to the right, SUP.10.BP2 is selected, and the associated Guidelines are shown.

How do I register a broken Rule?
Select a specific Guideline and **press "b"**. Add comment by **pressing "c"**. The Guideline is marked as broken in the table and will appear in the assessment report.

Can I mark a Rating Rule as "handled"?
To avoid that the same Guideline is manually evaluated more than once, a Guideline can be marked as "handled" by **pressing "h"**.

How do I toggle a "Suspect" warning?
Select the Guideline and **press "s"**.

Trace Assessor Assistant and Visualization:

Evaluation	Explanation	Visualization in Guideline tab *(example from SUP.10)*
Not ready	One or more associated BPs/GPs are not rated yet	SUP.10.RC.18 ··· ○. If the indicator *BP5*● is downrated, this should be in line with the rating of the definition of the content of a release (*SPL.2.BP1*●).
Met	The Guideline is met	SUP.10.RC.12 ✔. ○. If the rating of establishing bidirectional traceability (*BP8*●) is downrated due to missing dependencies between CRs and affected work products, the indicator (*BP4*●) should be downrated.
Manual	All associated BPs/GPs are rated. The Guideline is ready to handle manually	SUP.10.RC.1 🐾. ○. If the strategy does not include goals according to e) above, the indicator *BP1*● should be downrated.
Broken	The Guideline is evaluated to broken	SUP.10.RL.10 📧. ○. 💬. If CR status recording (*BP3*●) is rated P or N, the indicator (*BP7*●) shall be downrated.

Tips and Tricks
- When saving a BP/GP resulting in a TAA Warning, a window will drop down from top of the screen.
- Please note if TAA indicates "broken", the Guideline must still be manually registered as "Broken".
- Please note that any Guideline can be registered as broken.
- Please note that several filters can be used when displaying the rules, e.g. Type, Broken, or Impacts (direction). Please see screen shot above.
- Hover the Indicator status (BP dots) in Guidelines to see PAM text, notes, and Weaknesses, if any.

Three "bulk operations" are available, please hover buttons in Trace to see explanations.

14 About Indicator Annotations (IAs) and Overlays

What are IAs and how are they used?

- IAs are notes added to PAM Indicators. IAs are intended to support the Assessor(s) when assessing a specific Indicator. Example in image (0)

What are Overlays and how are they used?

- IAs are organized into groups, called "Overlays". Typically, an Overlay has multiple associated IA whereas a specific IA belongs to one and only one Overlay.

Overlays (and thereby IAs) can have either personal or project scope. An Overlay controls access rights to the IAs:

- Personal Overlay: Only the User creating the Overlay can create, edit, delete, and view associated IAs and RTs.
- Project Overlay: Project Members can view IAs in the Overlay. Project Administrators can create, edit, and delete associated IAs.

How do I create an IA?

- Open Overlay Settings from Overlay button (1) and select an overlay that you wish to create an IA in (2).
- Click on Edit checkbox for the selected overlay (2) and close the Overlay Setting window.
- Select the relevant Indicator (BP/GP) in List or Grid view and click the ✏ icon (5) to open a window.
- Add Practice if you wish to add another Practice (6), enter the description of IA and Click Save.

How do I select which IAs to show?

- Select: Configure Overlay button from Tree view or Grid View, "Overlay Settings". Window opens (1)
- Select Overlay(s).
  - To create new, click "+ Personal (4)" to create a Personal Overlay.

How do I edit an IA?

- Open Overlay Settings from Overlay button (1) and click on Edit check box that contains the IA (3).
- For each IA, edit is possible by clicking the description of the IA (Grid view or Tree view)

Tips and Tricks

- Typically, Indicator Annotations are used for questions to ask or things to consider when understanding the implementation of a practice.
- As a part of planning an Assessment, Project Overlays can be selected. This makes the Overlay available to all Assessors in the Assessment.
- IAs can be edited using Excel. Select the menu: Trace -> Overlays -> "Download Overlay" and "Update Overlay". See Excel, tab "Instructions".

15 About Record Templates (RTs)

What are RTs and how are they used?
- RTs are templates for Records making is easy to create high quality Records having a standardized description, Record Type and relations to one or more Indicators.
- RTs are organized by Overlays like IAs

How do I create an RT?
- Open Overlay Settings (1), select an overlay (2), click on Edit check box (3).
- Open an existing Record or create a new
- To create from Record, click "Create Record Template" button (6) from Record window. This opens the Record Template Editor.
- To create from scratch, click ↪ button (5) right next to Practice name form Grid view or Tree view.
  Suggested Record Template will popup (7), click on + button (8). This opens the Record Template Editor.
- Select the relevant Practices, Record Type and Overlay to save RT to and click Save.
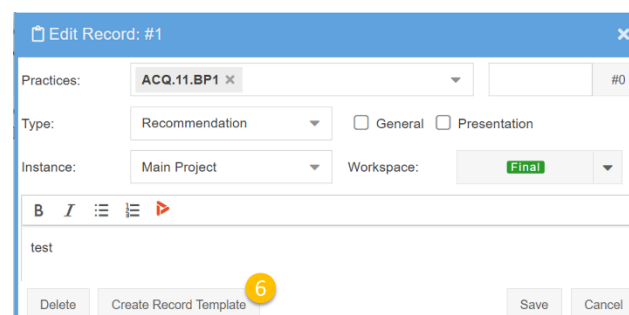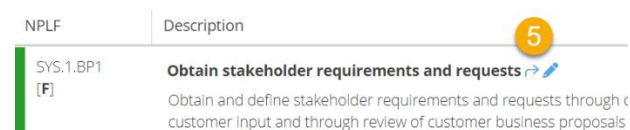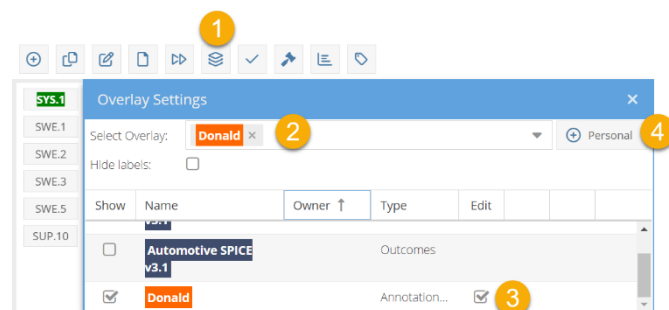
How do I find and use a Record Template?
- Select the relevant Indicator (BP/GP) in List or Grid view and click ↪ button (5) or press: **"t"**.
- Suggest Record Template Window opens (7).
- Search / Filter Record Templates, if needed
- Click arrow-icon ↪ (9) to copy Record Template to Record Editor.
- Modify if needed and save to create Record.

How do I edit a TR?
- Open Overlay Settings (1), select the overlay containing the TR(2), click on Edit check box (3).
- Select the relevant Indicator (BP/GP) in List or Grid view and click ↪ button (5) to open the "Suggested Record Template" (7)
- Click the Description text to edit (10)
- Save when done.
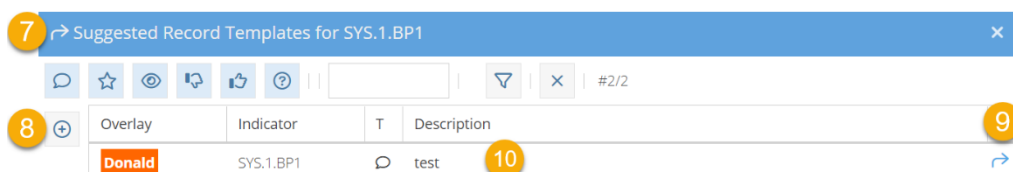
Tips and Tricks

- RTs can be made from existing Records. Just open the Record and click "Create Record Template" button. This will populate the Record Template Editor with Relation(s) to Indicators, Record Type, and Description.
- RTs can be created from the "Suggested Record Templates" by clicking the "+".
- When creating Record Templates from Records having Evidence References, the Evidence Name and number will be substituted a text string representing the Evidence Type, e.g. [Design Document] or [Project Plan]. If the referred Evidence has no type, the string will be [XXX] in the Record Template.
- Start building your repository of great Assessor Records now opening and reviewing old assessments and selecting and creating Record Templates from the relevant Records.
- Like IAs it is possible to "bulk edit" RT's in Excel using the menu: Trace -> Overlays -> "Download Overlay" and "Update Overlay". See Excel, tab "Instructions".