Trace

Model Manager

Applicable for Sharpen360 Trace v5.0+

Revision 0.8 (WIP)

Sharpen360
Knowledge Worker Tools

Table of Content

1 Introduction

THIS DOCUMENT IS NOT COMPLETE, BUT WHAT'S THERE IS CORRECT. YOU SHOULD BE FINE GETTING STARTED USING THIS DOCUMENT TO UNDERSTAND THE TRACE MODEL MANAGER. MORE CONTENT WILL BE ADDED DURING THE NEXT DAYS!

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

This document describes how to use *Trace Model Manager (TMM)*. The target audience is users who needs to:

- Upload new Assessment Models or Guidelines
- Upload or develop Models, and possible convert Models to Assessment Models.
- Develop Map Sets
- Manage the availability of Assessment Models, Guidelines, Models, and Map Sets for Trace Assessors.

We try to use a precise naming of concepts in Trace and Trace documentation, please see chapter see [Trace 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!
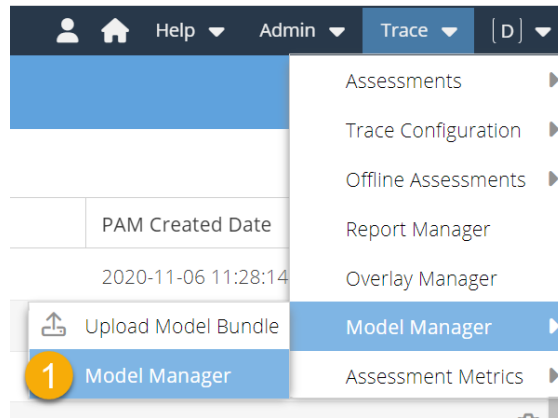
The Sharpen360 Team.

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

2 Model Manager Concepts

2.1 Accessing the Model Manager

Model manager can be opened from the menu: Trace -> Model Manager-> Model Manager (1)

The Model Manager requires "Manage Models and Standards" permission to access the page, which is only assigned to System Administrator and Trace Administrator. The menu is shown only to users with this permission.

Below image shows the Model Manager. The page has four tabs: Assessment Models, Guidelines, Models, Map Sets.

2.2 Assessment Models, Guidelines, Models, and Map Sets

Table explaining the four concepts

Name	Description
Assessment Model	
Guideline	
Models	
Map Sets	

3 Assessment Models

Assessment Models tab shows the list of PAMs in Trace.

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

1. **Upload Assessment Model (PAM)** button can be used to upload a PAM Def file other Trace systems. See below for how to download PAM Def file.
2. This column shows **the number of assessments** that are using this PAM.
3. This column shows the **status** of the PAM. (Assessable or Disabled)
4. This column shows the **family** that the PAM belongs. (e.g. ISO3300)
5. This column shows the measurement framework that the PAM uses. (e.g. ASPICE3_1)
6. This column shows the created date of the PAM.
7. Cog wheel can be clicked to display actions on the PAM. Options shown below: (options may vary depending on the PAM)
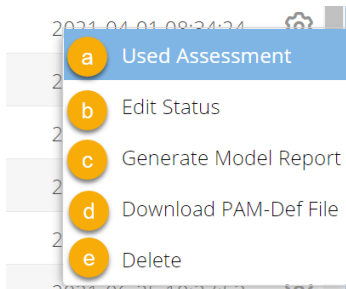
   a. Show assessments using this PAM
   b. Edit Status of the PAM (e.g. Name and status)
   c. Generate Model Reports (only available for non-protected PAMs)
   d. Download PAM Def file to transfer to another Trace system. (only available for non-protected PAMs)
   e. Delete the PAM

4 Guidelines

Guidelines tab shows the list of available guidelines in Trace.

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

1. Upload Guideline (GDL) button can be used to upload a guideline file from other Trace system.
2. This column shows the linked model (PAM) of the guideline. The guideline is only offered in assessments when the model is assigned.

5 Models

5.1 Model tab and Model menu

Screenshot of mechanisms in cogwheel, explain this is where to find the function, and write that they will be explained below.

1. Upload Model (MDL) button: upload model file from other Trace system.
2. Download Model Template (XLSX) button: download Excel template file for defining. See below for steps to create a model.
3. Upload Model (XLSX) button: upload edited Excel file from (2) to create new model. See below for steps to create a model.
4. This column shows Map Sets associated with the model.
5. Shows the state of the model (editable or copyright protected)
6. Cog wheel can be clicked to display actions on the model. Options shown below: (options may vary depending on model)
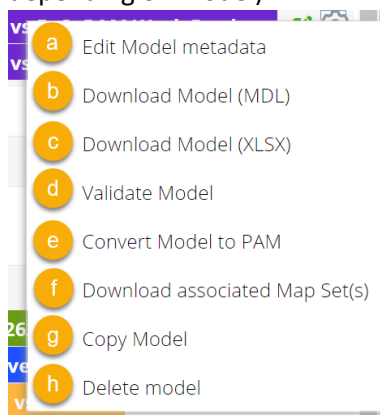
   a. Edit Model Metadata: open window to change name, external Id, and state of the model
   b. Download Model (MDL): download model file to transfer to another Trace system. This file can be uploaded in Upload Model (MDL) (1)
   c. Download Model (XLSX): download Excel file to be edited and uploaded. This file can be uploaded in Upload Model (XLSX) (2)

d.   Validate Model: checks whether the model can be used in assessment
e.   Convert Model to PAM: converts model to PAM to be used for assessments. This requires specific structure for the model, therefore checks automatically for the structure.
f.   Download associated Map Set(s): download related Map Sets for this model
g.   Copy Model: creates a copy of the model
h.   Delete Model: delete this model

5.2 Create or update a Model

Explain how create a model, copy text from excel and make this better/more precise here

refer to Model Families (point to last chapter) for an explanation of the formats.

Explain how to update, the name / description columns.

To create a model, first download Excel template file from Download Model Template (XLSX) button (1).

Open the Excel file and open Model_Info sheet (2) and enter name of the model in B2 cell (3) and external id in B3(4).

Open Model sheet to create model nodes.

Row Nbr	ParentId	ExternalId	SubId	Type	Name	Description	Reference
1	Model	P2	P2	Area	Peter´s Management Process		
2	P2	P2.5	5	Group	Management of Deliveries	organizations involved in the execution of the safety lifecycle, i.e. those that are responsible for the safety lifecycle or are performing safety activities in the safety lifecycle, achieve the	
3	P2.5	P2.5.a	a	Outcome	All project wp's are identified		
4	P2.5	P2.5.b	b	Outcome	project milestones		
5	P2.5	P2.5.c	c	Outcome	Tino's outcome		
6	P2.5	P2.5.d	d	Outcome	My outcome d		
7	P2.5	P2.5.e	e	Outcome	My outcome e		
8	P2.5	P2.5.Q1	5.Q1	Question	With which elements does the organization maintain a culture of safe work?	Details of the first question goes here	Outcome: a
9	P2.5	P2.5.Q2	5.Q2	Question	Is a defined and documented FS process effective for all relevant phases of the safety lifecycle in all levels and functions?		Outcome: b
10	P2.5	P2.5.Q3	5.Q3	Question	Does the orga nization have a safety anomaly resolution process? Peter		Outcome: c, d, e
	P2	P2.6	6	Group	Peters area		
	P2.6	P2.6.a	a	Outcome	My outcome a for 2.6		
	P2.6	P2.6.Q1	6.Q1	Question	what's wrong?		Outcome: a
15	Model	WP_1	WP_1	WorkProduct	Acceptance criteria		
16	Model	WP_2	WP_2	WorkProduct	Architecture		
17	Model	WP_3	WP_3	WorkProduct	Audit report		
	END-OF-TABLE						

Model | Model_Info | Instructions

The Model sheet contains sample data that can be used as reference when creating a new model from Excel sheet. The sample data can be removed before inserting new nodes in the model. Each row represent a node in the model.

5.3 Validate a model

5.4 Publishing a Model as an Assessable Model

5.5 Exporting and Importing a Model

5.6 Retire a Model

6 Map Sets

6.1 Map Set tab and Map Set menu

Screenshot of mechanisms in cogwheel, explain this is where to find the function, and write that they will be explained below.

1. Create Map Set: button to create new Map Set
2. Upload Map Set (MAP): upload Map Set file from other Trace system, see below for downloading Map Set file
3. Upload Map Set(XLSX): upload Excel file to create a Map Set
4. Map Set type column: shows the type of Map Sets, hover the icon to see name of the type.
5. Editable status column: shows whether Map Set is editable or not editable
6. Visible status column: shows whether Map Set is visible and can be used in assessments
7. Cog wheel button: shows additional actions on Map Set

    a. Edit Map Set Metadata: open window to change meta data of the Map Set(e.g. name, external Id, color and visible)

    b. Download Map Set(MAP): download Map Set file to transfer to another Trace system. This file can be uploaded in Upload Map Set (MAP)(2)

    c. Download Map Set(XLSX): download Excel file to be edited and uploaded. This file can be uploaded in Upload Map Set(XLSX) (3)

    d. Copy Map Set: create a copy of the Map Set

    e. Delete Map Set: delete the Map Set

6.2 How to create a Map Set

1. Click on Create Map Set button
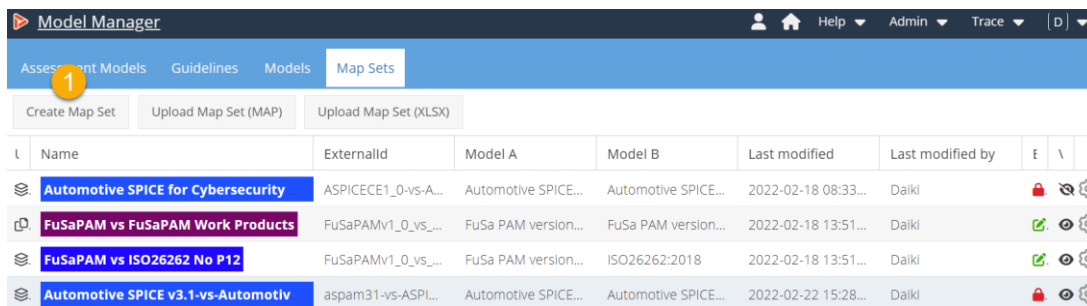
2. Create new Map Set window will appear. Enter details about the Map Set and click the Save button. You can choose different ways to use the Map Set: Evidence Suggestion, Indicator Overlay or Indicator Linking.
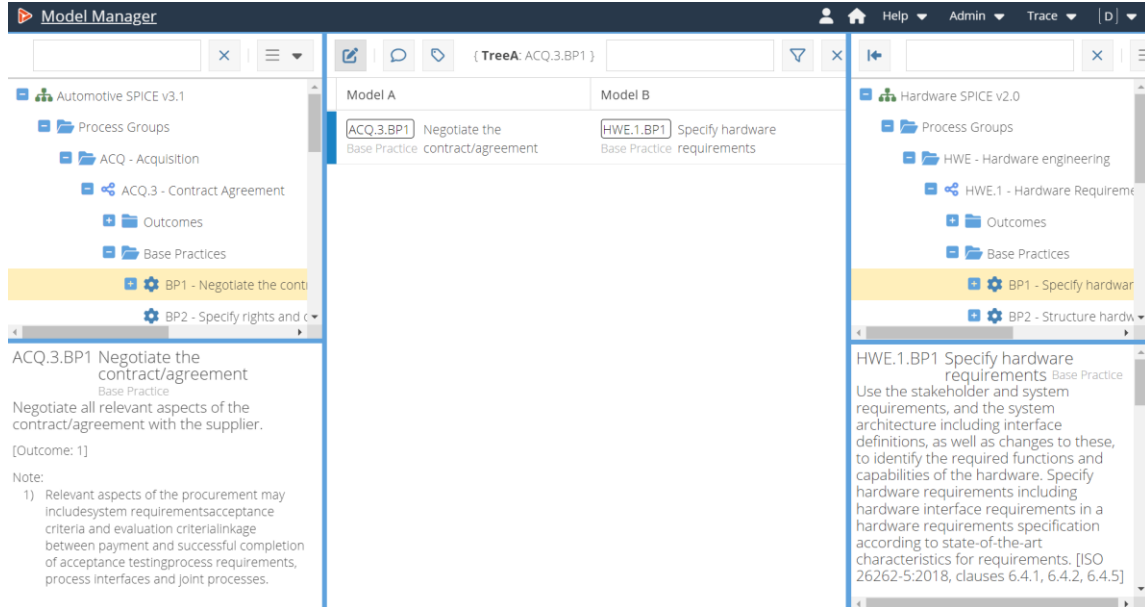

3. Open the Map Set by double clicking it.

4. Map set editor will open (shown below).

a. Left and right panels show the structure of the models selected in step 2 with the details on the selected node below the tree.
b. Center panel shows the list of node maps in the Map Set
c. Drag a node from a model in the right or the left panel and drop the node onto another node in the panel.
d. Following window will pop up when dropping the node. Fill the details about the node map and click Save. Text in the "Node Map Text" will be displayed in the Assessment automatically and

the comment is only shown when it is turned on.

e. Once done editing Map Set, go back to the Map Set tab and click on the cog wheel for this Map Set and select Edit Map Set metadata. Check on the Visible (1) to use it in Assessment and click on Save.

6.3 How

7 Using Map Sets from Trace Assessment System

To use Map Sets from Trace assessment, open the Scope tab (1) then assign the Map Set from Map Sets selector (2).

7.1 Using a Map Set for Evidence Suggestion

7.2 Using a Map Set as Indicator Overlay

After the Map Set is assigned to the assessment (follow the instruction in 7. Using Map Sets from Trace Assessment System), Map set with Indicator Overlay type is automatically assigned to the overlay and displayed for nodes in Grid View and Tree view. The overlay can be configured from Configure Overlay button (1) from the Tree view and Grid view.

From the Overlay settings, Indicator Overlay can be hidden by unchecking the left most check mark (2). The check marks (3) and (4) will show the name and the description of the node that the node map is referencing. The check mark (5) will display the comment for the node map.

7.3 Using a Map Set for Indicator Linking

8 Available Model Families

8.1 Overview of Model Families

8.2 Generic Assessment Model (GAM)

8.3 Generic Hierarchy

8.4 ISO21434

8.5 ISO26262

8.6 ISO33000

8.7 KGAS