

TRACE v6.0.3 Cheat Sheet for assessors 20250402

Tip: Select default [Target Workspace](#) and default [Target Instance](#) in the top row of Trace!

Area	Function	Shortcut	Description	Tip: For quick support, use support@sharpen360.com	
Evidence	New Evidence	N	Create new Evidence (Must be on the Tree View, Grid View, or Evidence tabs).		
	Edit Evidence	E 	Edit the selected Evidence or click the Evidence Id to edit.		
	Create Evidence Reference	<shift> <ctrl> F	Create an Evidence reference from a html-text field in a Record or Note		
Records	Create Record	c, r, o, w, W, s, q 	Create Record of type (<i>select Indicator in List or Grid View before</i>): comment / recommendation / observation / weakness / Weakness, High / strength / question		
	Select Record	No shortcut 	Click a Record row with your mouse. Use <CTRL> to multi-select or deselect.		
	Edit Record	No shortcut 	Click the Record description to edit (text will highlight when hovering).		
	Toggle General/Presentation	G, R	Toggle general checkbox / Toggle report checkbox (<i>select Record before!</i>)		
	Move/ Copy Record(s)	M, D	Move/Copy (Duplicate) selected record(s) to target workspace		
	Transfer Records to Project	No shortcut 	List view: Select one or more Records and click the icon to transfer Record(s) to selected Project.		
Ratings	Rate model indicator(s)	<enter> 	Select one or more indicators, use <enter> to open rating selector; or click the rating indicator. Use arrows <←> <enter> to rate the indicator(s).		
Overlay	Open Overlay Configuration	Y	Open Overlay Configuration window Use the checkboxes to show / hide overlays. Create your own overlays and edit them!		
Guidelines	Assessor Assistant Symbols		<ul style="list-style-type: none"> ⋯ : Not ready. Not all referred BPs/GPs/PAs are rated. ✓ : The Guideline is automatically evaluated to Met 🚩 : The Guideline is automatically evaluated to Broken 🐾 : Must be manually evaluated (automatic evaluation not possible with the current ratings) 		
	<i>Tip – in Trace try to: - Hover BPs to see Weaknesses</i>				
	Select Guideline		Click the id of the Guideline to select one or more guidelines.		
	Mark Guideline as “Handled”	H	Toggle Guideline between handled/unhandled (Symbol: )		
	Mark Guideline as “Broken”	B	Mark Guideline as broken (Red if Rule (Symbol: ), Orange if Recommendation (Symbol: )) Trace will automatically ask for a comment (Symbol: ).		
Toggle “Suspect”	S	Toggle suspect indication (Symbol: ) for a Guideline			
Various	Drop-down menus	↑↓ <enter> <esc>	Arrows ↑↓ to move focus, <enter> to select, <esc> to close menu, <tab> for next field		
	Expand/Collapse Tree	<tab>	<tab> for next field, e.g., after having selected a value in a dropdown field.		
	Expand/Collapse Tree	+ - → ←	Select node: + to fully expand; - to fully collapse, → to expand one level, ← to collapse one level		
	Cut, Copy, Paste text	<ctrl> X / C / V	Cut (X) or Copy (C) selected text from Notes or Records and paste (V) text into Notes or Records		
	Save (in general)	<ctrl> S	Save & Close in Record, Evidence, and Notepad windows		
	Cancel (in general)	<esc>	Cancel window without saving, alternatively click outside window		

Tip: Documentation and training videos, click here: [Trace v6 Support](#) 

Tip: Stay informed, join our [newsletter](#) 

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