Caliber 3.0 Documentation

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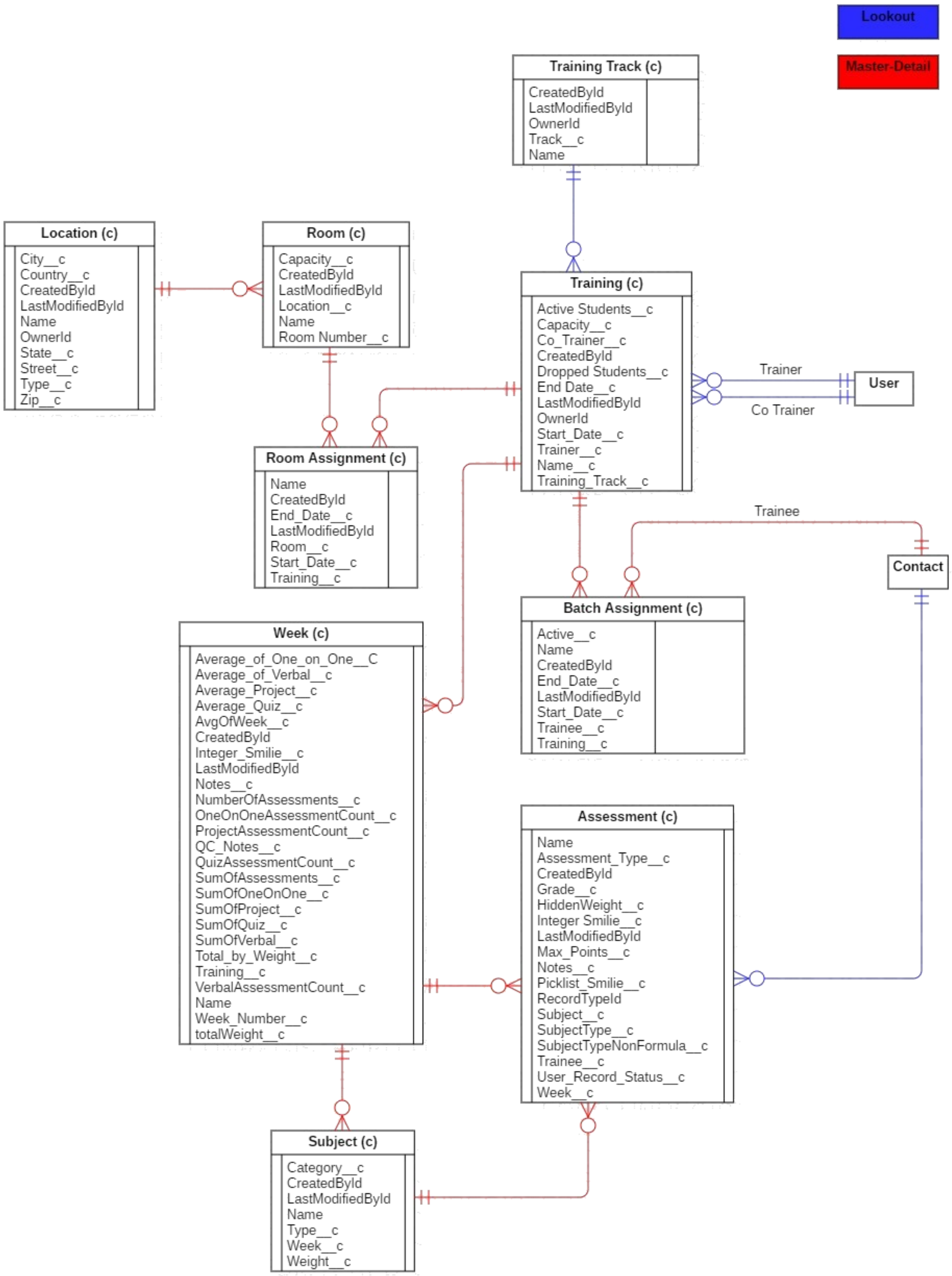
Changelog

9/13/2018

- Initial Data Model Approved and Deployed

Overview

Data Model


Lookout
Master-Detail
Training Track (c)
CreatedById
LastModifiedById
OwnerId
Track__c
Name
Location (c)
City__c
Country__c
CreatedById
LastModifiedById
Name
OwnerId
State__c
Street__c
Type__c
Zip__c
Room (c)
Capacity__c
CreatedById
LastModifiedById
Location__c
Name
Room Number__c
Training (c)
Active Students__c
Capacity__c
Co_Trainer__c
CreatedById
Dropped Students__c
End Date__c
LastModifiedById
OwnerId
Start_Date__c
Trainer__c
Name__c
Training_Track__c
Trainer
Co Trainer
User
Room Assignment (c)
Name
CreatedById
End_Date__c
LastModifiedById
Room__c
Start_Date__c
Training__c
Trainee
Contact
Batch Assignment (c)
Active__c
Name
CreatedById
End_Date__c
LastModifiedById
Start_Date__c
Trainee__c
Training__c
Week (c)
Average_of_One_on_One__C
Average_of_Verbal__c
Average_Project__c
Average_Quiz__c
AvgOfWeek__c
CreatedById
Integer_Smilie__c
LastModifiedById
Notes__c
NumberOfAssessments__c
OneOnOneAssessmentCount__c
ProjectAssessmentCount__c
QC_Notes__c
QuizAssessmentCount__c
SumOfAssessments__c
SumOfOneOnOne__c
SumOfProject__c
SumOfQuiz__c
SumOfVerbal__c
Total_by_Weight__c
Training__c
VerbalAssessmentCount__c
Name
Week_Number__c
totalWeight__c
Assessment (c)
Name
Assessment_Type__c
CreatedById
Grade__c
HiddenWeight__c
Integer Smilie__c
LastModifiedById
Max_Points__c
Notes__c
Picklist_Smilie__c
RecordTypeId
Subject__c
SubjectType__c
SubjectTypeNonFormula__c
Trainee__c
User_Record_Status__c
Week__c
Subject (c)
Category__c
CreatedById
LastModifiedById
Name
Type__c
Week__c
Weight__c

Objects

Contact

N/A

User

N/A

Custom Objects

Assessment

Field Label	Field Name	Data Type
Assessment Number	Name	Auto Number
Assessment Type	Assessment_Type__c	Formula(Text)
Created By	CreatedById	Lookup(User)
Grade	Grade__c	Percent(15,3)
HiddenWeight	HiddenWeight__c	Percent(18,0)
Integer Smilie	Integer_Smilie__c	Number(18,0)
Last Modified By	LastModifiedById	Lookup(User)
Max Points	Max_Points__c	Formula(Number)
Notes	Note__c	Long Text Area(32768)
Picklist Smilie	Picklist_Smilie__c	Picklist
Record Type	RecordTypeId	Record Type
Subject	Subject__c	Master-Detail(Subject)
SubjectType	SubjectType__c	Formula(Text)
SubjectTypeNonFormula	SubjectTypeNonFormula__c	Text(255)
Trainee	Trainee__c	Lookup(Contact)
User Record Status	User_Record_Status__c	Formula(Checkbox)

Week	Week__c	Master-Detail(Week)

Batch Assignment

Field Label	Field Name	Data Type
Active	Active__c	Checkbox
Batch Assignment Number	Name	Auto Number
Created By	CreatedById	Lookup(User)
End Date	End_Date__c	Formula(Date)
Last Modified By	LastModifiedById	Lookup(User)
Start Date	Start_Date__C	Date
Trainee	Trainee__C	Master-Detail(Contact)
Training	Training__c	Master-Detail(Training)

Location

Field Label	Field Name	Data Type
City	City__c	Text(100)
Country	Country__c	Text(100)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Location Name	Name	Text(80)
Owner	OwnerId	Lookup(User,Group)
State	State__c	Text(100)
Street	Street__c	Text(100)
Type	Type__c	Picklist
Zip	Zip__c	Text(25)

Room

Field Label	Field Name	Data Type
Capacity	Capacity__c	Number(18,0)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Location	Location__c	Master-Detail(Location)
Room Name	Name	Text(80)
Room Number	Room_Number__c	Number(18,0)

Room Assignment

Field Label	Field Name	Data Type
Assignment Number	Name	Auto Number
Created By	CreatedById	Lookup(User)
End Date	End_Date__c	Date
Last Modified By	LastModifiedById	Lookup(User)
Room	Room__c	Master-Detail(Room)
Start Date	Start_Date__c	Date
Training	Training__c	Master-Detail(Training)

Subject

Field Label	Field Name	Data Type
Category	Category__c	Picklist
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Subject Name	Name	Auto Number

Type	Type__c	Picklist
Week	Week__c	Master-Detail(Week)
Weight	Weight__c	Number(15,3)

Training

Field Label	Field Name	Data Type
Active Students	Active_Students__c	Roll-Up Summary (COUNT Batch Assignment)
Capacity	Capacity__c	Number(18,0)
Co-Trainer	Co_Trainer__c	Lookup(User)
Created By	CreatedById	Lookup(User)
Dropped Students	Dropped_Students__c	Roll-Up Summary (COUNT Batch Assignment)
End Date	End_Date__c	Date
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Start Date	Start_Date__c	Date
Trainer	Trainer__c	Lookup(User)
Training Name	Name	Text(80)
Training Track	Training_Track__c	Lookup(Training Track)

Training Track

Field Label	Field Name	Data Type
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,group)

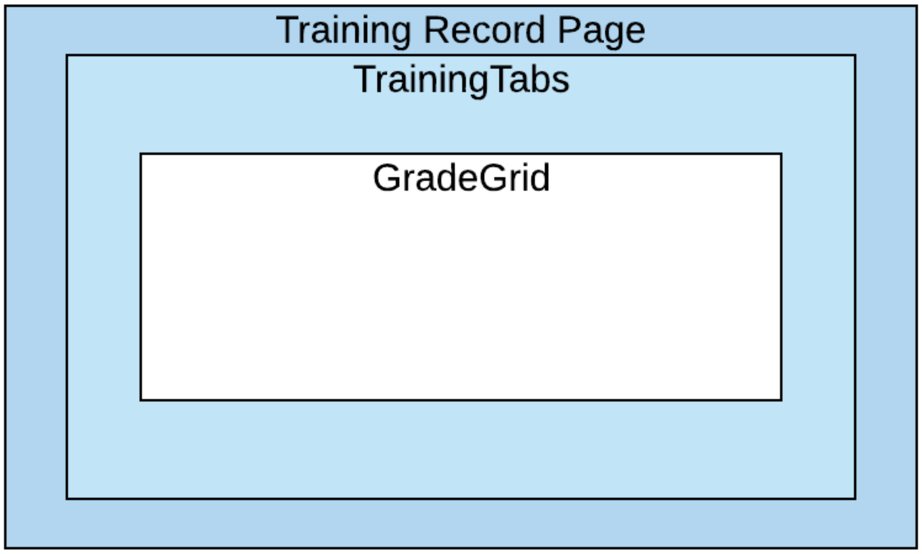
Track	Track__c	Text(50)
Training Track Name	Name	Text(80)

Week

Field Label	Field Name	Data Type
Average of One on One	Average_of_One_on_One__c	Formula(Percent)
Average of Verbal	Average_of_Verbal__c	Formula(Percent)
Average Project	Average_Project__c	Formula(Percent)
Average Quiz	Average_Quiz__c	Formula(Percent)
Average Score	AvgOfWeek__c	Formula(Percent)
Created By	CreatedById	Lookup(User)
Integer Smilie	Integer_Smilie__c	Number(18,0)
Last Modified By	LastModifiedById	Lookup(User)
Notes	Notes__c	Long Text Area(32768)
NumberOfAssessments	NumberOfAssessments__c	Roll-Up Summary (COUNT Assessment)
OneOnOneAssessmentCount	OneOnOneAssessmentCount__c	Roll-Up Summary (COUNT Assessment)
ProjectAssessmentCount	ProjectAssessmentCount__c	Roll-Up Summary (COUNT Assessment)
QC Notes	QC_Notes__c	Long Text Area(32768)
QuizAssessmentCount	QuizAssessmentCount__c	Roll-Up Summary (COUNT Summary Assessment)
SumOfAssessments	SumOfAssessments__c	Roll-Up Summary (SUM Assessment)
SumOfOneOnOne	SumOfOneOnOne__c	Roll-Up Summary (SUM Assessment)
SumOfProject	SumOfProject__c	Roll-Up Summary (SUM

		Assessment)
SumOfQuiz	SumOfQuiz__c	Roll-Up Summary (SUM Assessment)
SumOfVerbal	SumOfVerbal__c	Roll-Up Summary (SUM Assessment)
Total by Weight	Total_by_Weight__c	Roll-Up Summary (SUM Assessment)
Training	Training__c	Master-Detail(Training)
VerbalAssessmentCount	VerbalAssessmentCount__c	Roll-Up Summary (COUNT Assessment)
Week Name	Name	Text(80)
Week Number	Week_Number__c	Picklist
Weight Total	totalWeight__c	Roll-Up Summary (SUM Subject)
Weight Average	Weighted_Average__c	Formula(Percent)


Legend:
Yellow: Record Page
Red: Apex Controller
Green: Event
Training Record Page
TrainingTabs
Lightning Component
TrainingTabs
Apex Controller
GradeGrid
Lightning Component
GradeGrid
Apex Controller
AverageSmile
Lightning Component
CreateAssessmentModal
Lightning Component
GradeRow
Lightning Component
GradeRow
Apex Controller
FaceChangedEvent
GradeBox
Lightning Component



Batch Assessment

The purpose of the Batch Assessment page is to display information concerning an assessment assigned to the members of a batch within a certain week. After the user has navigated to the Trainings tab, the user must click the word, “Batch Assessment” next to Details.

The layout for the Batch Assessment page is simple and intuitive. There is a horizontal list that contains week tabs with each tab showing information with assessments assigned and completed that week. The next thing a user will see will be the “Add Assessment” button which will explained upon later. Finally, the user will be able to see a table where the grades earned by each trainee will displayed in their respective row. The columns in this table will made of the title of the assessment and its associated weight displayed.

1. Locate the Add Week button

This button allows the user to add a week to the Batch Assessment page. To the right of the horizontal list of weeks created thus far and to the right of the final week of this list is the location of the Add Week button. This button is square with a plus sign in the middle.

- Once clicked you will see a modal which will warn you about the permanence of this action. Once the week is created, the action can’t be undone without the assistance of an administrator.

2. Locate the Add Assessment button on the page

The add assessment functionality creates a new column in the table with a header displaying the Assessment Subject, Type, and percent weightage. This button is located to the left of the table's column headers.

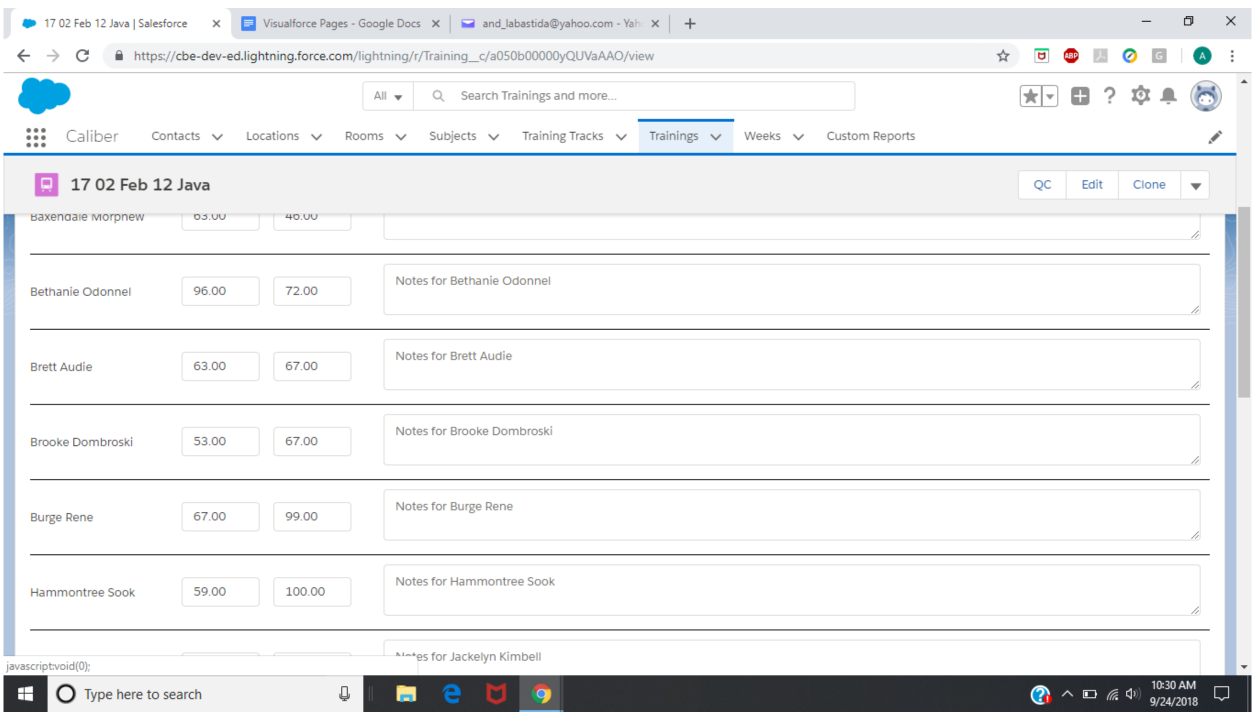
- Once clicked you will a modal which will contain the form where the information will be inserted to create an assessment. The subject field can contain any name comprised of both letters and numbers, and the type will be chosen from a picklist. The weight field will only accept a number and will be displayed as a percentage.

3. After saving an assessment

An empty new column will be automatically created. At this point, the user will be able to input raw data for the grades earned by the students

5. Editing an assessment

After an assessment and its respective column has been created, there is a gear icon that be clicked to edit the assessment.



4. Notes

There are two different notes input fields that the user can use to input notes concerning the batch. The notes located on the far right side of the table are used to input notes related to an individual trainee's performance. The second notes tab is located on the bottom of the page. This note input field can be used to input notes on the batch as a whole.

The batch assessment page view is built using the TrainingTabs Lightning component. The dynamic tab panel shown at the top of the view is built using a call to a method in the TrainingTabsController Apex class. The method queries the database for all of the week records related to the viewed training record, and displays them within the tab panel as clickable tabs. Th component also implements the “add week” button along with the warning box associated with it. Should a week be added, the component, via the apex controller, makes a database insert and updates the tab panel.

The GradeGrid component is used within the TrainingTabs component to add information within the Batch Assessment View. This component calls upon its controller, GradeGridController, GradeRow, and the GradeBox component to populate the page. A modal box is also generated by GradeGrid, with its data determined by the CreateAssessmentModal component.

Known Issues

There currently is a bug that occurs when the record view is switched between batch assessment and quality control. The bug occurs if a user has loaded both views prior to creating to a new week. When a new week is created, the view the user is currently on updates the tab panel with the new week, but the other view does not unless the entire page is refreshed. A proposed solution was to use event handling to force view refresh, but was not implemented due to time constraints and the need to possibly reconstruct the code architecture.

Quality Control

The purpose of the Quality Control page is to display information concerning how a specific batch performed during its weekly Quality Control session. After the user has navigated to the Trainings tab, the user must click the word, “QC” next to Batch Assessment.

The layout for the Quality Control page is designed to be as simple as possible. There is a horizontal list that contains week tabs with each tab showing information on every trainee’s performance when they were asked a question during their Quality Control session. In each week tab, the list of trainees will be displayed on the left side of the page. To the right of each of the trainee’s names is a scalable vector image, which will be expanded upon later, that represents their performance. To the right of the scalable vector image is a text field where notes on the each on each individual trainee can be recorded. Underneath the last trainee in the batch is the average performance of the batch represented by a scalable vector image. Finally, at the bottom of the bottom of the page is an input field where notes can be recorded concerning the entire batch’s performance.

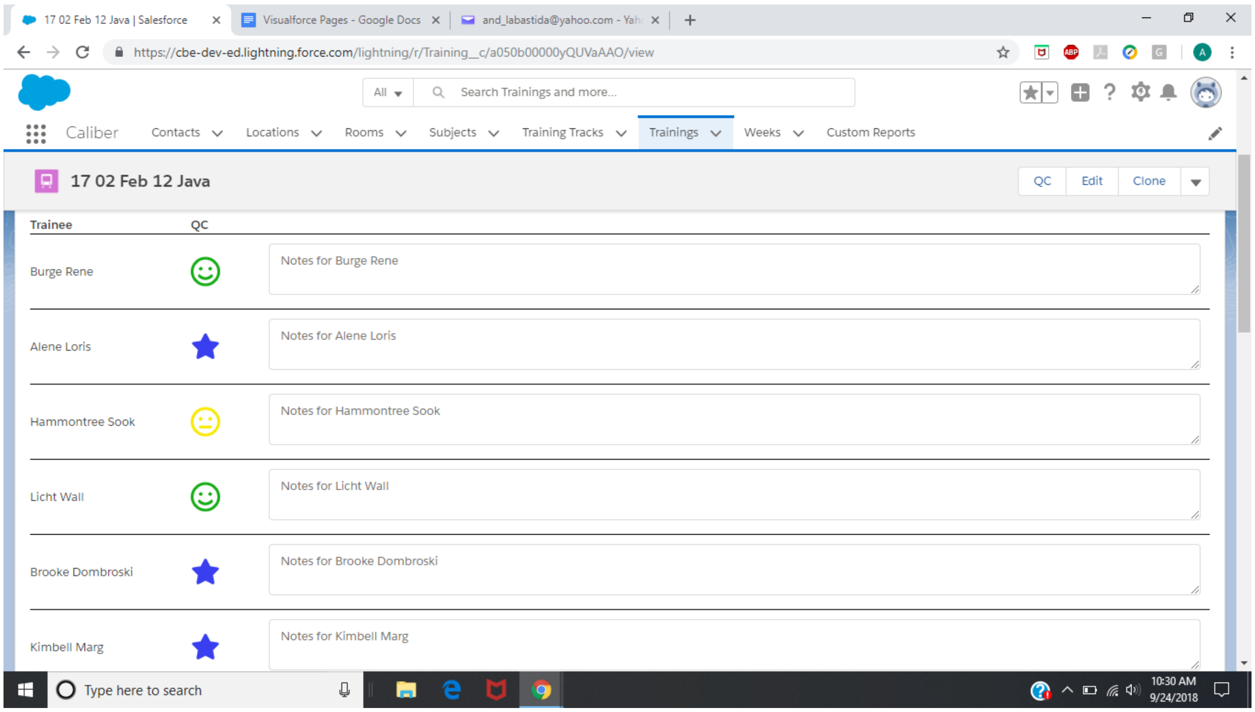
1. Locate the Add Week button

This button allows the user to add a week to the Quality Control page. To the right of the horizontal list of weeks created thus far and to the right of the final week of this list is the location of the Add Week button. This button is square with a plus sign in the middle.

- Once clicked you will see a modal which will warn you about the permanence of this action. Once the week is created, the action can’t be undone without the assistance of an administrator.

2. Quality Control Images

As mentioned earlier, there are scalable vector images located to the right of each trainee and it represents their performance during the Quality Control session. There are five total images. The first image is an orange question mark, and it represents an exception or extenuating circumstance. For example, when a trainee is absent during the session. The second image is a blue star, and it represents when a trainee surpassed expectations and performed exceptionally. The third image is a green smiley face, and it represents when a trainee performed satisfactorily and confidently. The fourth image is a yellow neutral face, and it represents that the trainee may have grasp of the concept, but is not completely able to answer the question. The final answer is a red frowning face, and it represents that the trainee was completely unable to answer any question to any degree and may not be understanding the material. The user can cycle to these images by clicking on each individual image.



3. Notes

Similar to the notes in the Batch Assessment page, the input fields to the right of the images can be used to record notes on the trainee's performance during the session. Also similar to the batch assessment page, is the notes input field located on the bottom of the page. This input field will be used to record notes on the entire batch's performance.

4. Batch Average

Below the last trainee in the page are three faces which represent the average of batch's performance. All three faces are shown but only one face will be colored while the other two are greyed out. The face that is colored is the face that represents the batch's average.

The QC assessment page view is built very similarly to the batch assessment view. It follows the same architecture flow as batch assessment, with TrainingTabs calling GradeGrid and GradeRow. The difference here is a boolean variable being passed throughout the components, telling them to display different fields and data drawn from different components. Here, GradeGrid calls upon GradeRow, GradeBox, and AverageSmile to populate the page. AverageSmile is used to control the smiley face functionality for QC scoring.

Reports

Estimated Delivery Date: September 20th

Portal / Communities

Estimated Delivery Date: September 18th

Trainer Portal

- **Homepage** - The homepage displays the graphs that the trainer can use to gain performance information at a glance.
- **Manage Batch** - Uses standard record list of Training objects to allow the trainer to have quick access to different Training batches. Multiple list views exist to allow sorting by year.

Trainee Portal

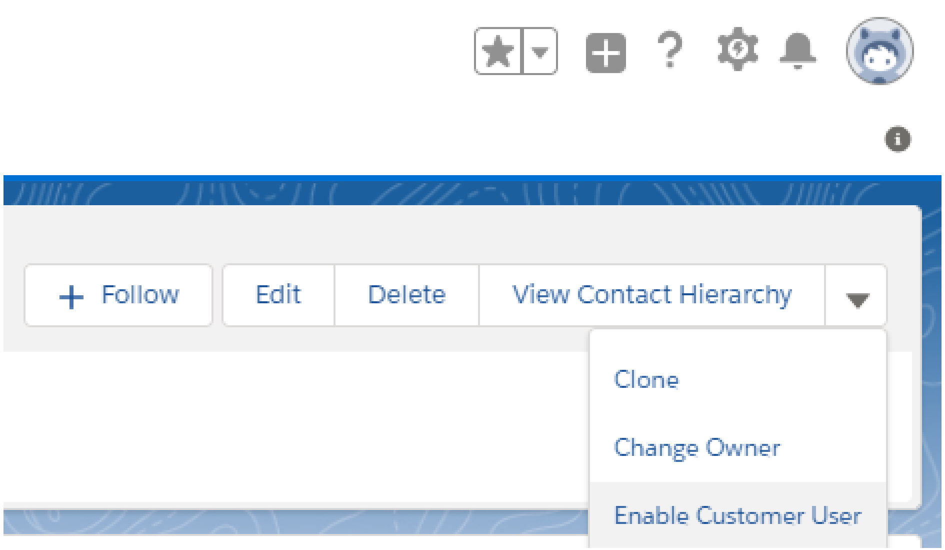
The trainee portal provides a way for trainees to communicate with each other, communicate with trainers, and view their performance.

- **Dashboard** - The dashboard allows a trainee to view their performance.
- **Chatter** - The chatter page allows trainees to communicate on a trainee chatter channel. They trainees can also send private messages to a trainer or other trainee who is in the same group as them.

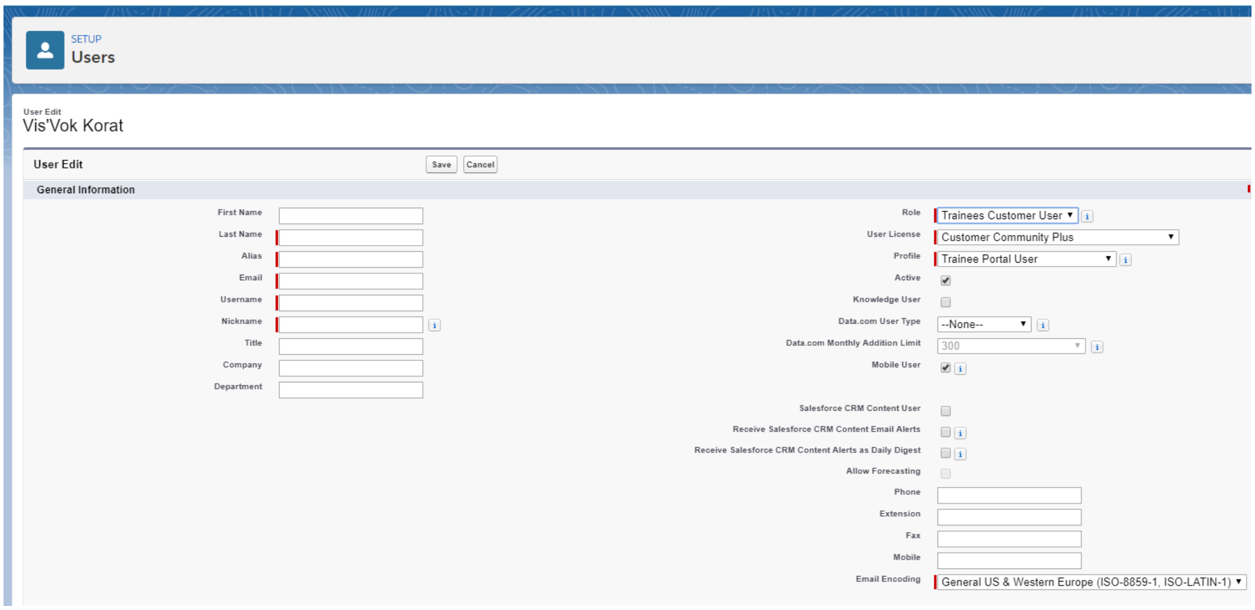
How to make a Contact into a Community User

To make a trainee/trainer a community member locate them in the contacts record list. Make sure the contact record has an account. Enter the contact's record page and click the **Manage External User** button, and then the **Enable Customer User**. This will make the contact into a user who can then have appropriate roles and profiles assigned to them. Trainees should have the **Trainee Portal User** profile while Trainers will use **External Trainer User** profile. Trainees and trainers will each have their own roles within the role hierarchy as well, but as of Calibur version 3.0, roles have not been finalized. A new user will need to have their password reset to log into the community. This can be done by selecting them in the user list and then clicking reset password.

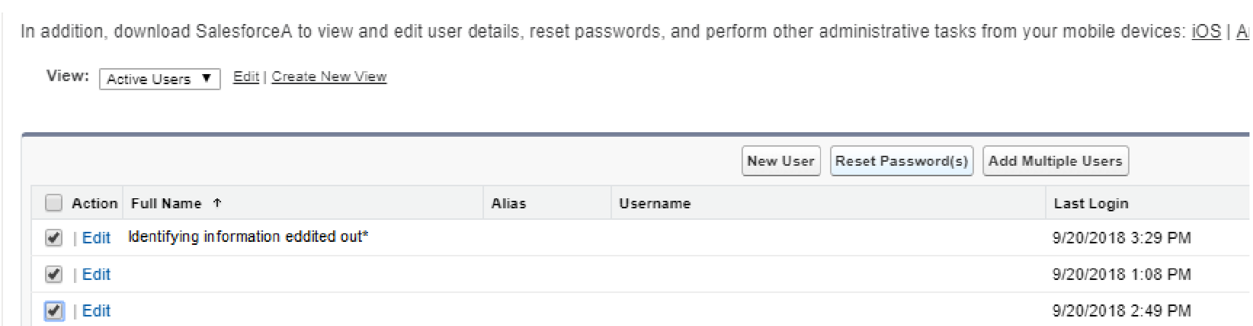
View from the contact record page of the Enable Customer User button.



Sample view from the user page with proper profile and license setup.



Sample view from the user list on resetting the password.



Survey

To use the survey a user must have the survey **Survey Creator** permission set applied to them. By default there is only two licenses for this permission set available.

Location
Surveys tab.
In survey tabs, click on the survey in the list view that you want to view. On the record page of the survey there is a button **Open Latest Version**. This will load the survey creator. From the creator you have three tabs: view, send, and analyze. With View you can edit or preview the survey. Within send you can get a link to the survey. And within analyze you can get back feedback from the surveys.

Known Issues
The survey feature is still new and lacking in some features. The font color and size of description text boxes is not editable. Data is anonymous by default and cannot be anonymized.