

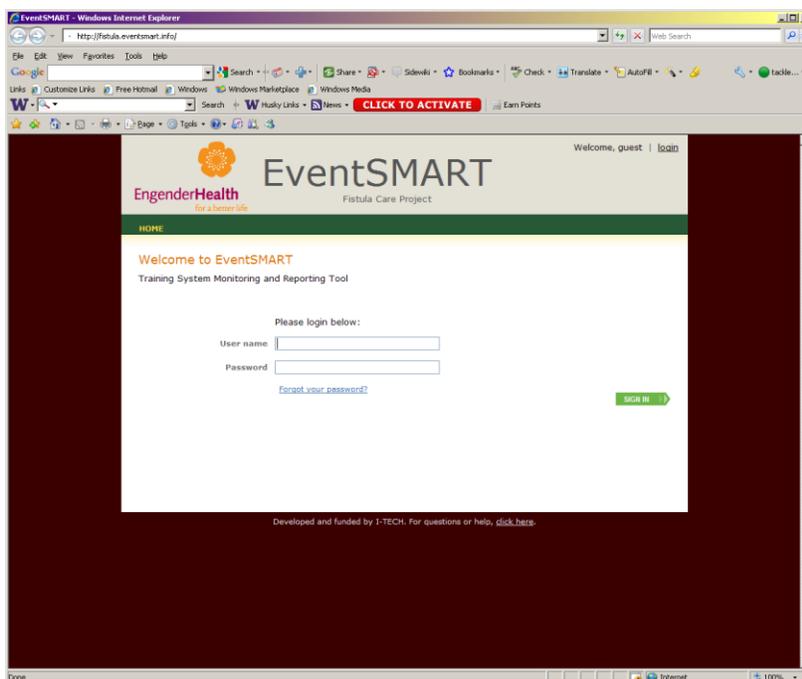
Release Notes: TrainSMART Version 3

As enhancements and fixes are made to TrainSMART we will periodically release a new Build. Due to the scope of the changes we have decided that this release will be a new version, thus, we are currently releasing Build 3.0. The enhancements mentioned below will automatically appear in your version of TrainSMART. There is nothing to be done on your part to receive these new modifications although some functionality may need to be enabled by the administrator for your site to begin using the enhancements. This document serves as an introduction and summary of the changes that have been completed.

These changes are explained in detail in this document. If you have any questions please contact Robert McLaughlin, Kate Waldman, or your QI Liaison.

Explanation of changes in TrainSMART version 3.0

I would like to thank Engender Health for underwriting the budget to make these changes. Through a partnership between I-TECH, NPOKI, and Engender Health we were able to modify TrainSMART to meet the needs of Engender. Engender will be rolling out TrainSMART to all of their worldwide projects. There are currently 12 Engender sites up and running with 32 more to come on-line in the next week. They will be working in many of the same locations that we are currently working in and may want to ask questions of I-TECH local staff. In the true sense of open source software, they have rebranded TrainSMART to work within their system. The screen shot below is what their version of TrainSMART will look like and should provide I-TECH with a concrete example of how TrainSMART can be customized for use by other non-I-TECH groups



Administrative/Setup

Extensive work was put into making this section more user friendly and giving each project even more flexibility in customizing TrainSMART (TS) to their needs.

The screenshot shows the 'Country Setup' page in the TrainSMART administrative interface. The page is divided into several sections: a navigation menu on the left, a main content area with a table for field settings, and a 'Modules' section with checkboxes for enabling various features. At the bottom, there are 'SAVE' and 'SAVE & CONTINUE' buttons.

Navigation Menu:

- HOME
- TRAININGS
- PEOPLE
- PLACES
- REPORTS
- MY ACCOUNT
 - Country Setup
 - Training Settings
 - People Settings
 - Facility Settings
 - Add New User
 - Edit User

Country Setup Settings Table:

Field	Display	Label	Options
Country		Botswana	
Region A		District	Add/Edit
Region B	<input type="checkbox"/>	Sub-District (If applicat	Add/Edit
City/Town		City/Town/Village	

Modules:

- Evaluation Enable
- Approvals Enable
- Historical Data Enable
- Unknown Participants Enable

Languages:

- English Enable Default
- French Enable Default

Buttons: SAVE, SAVE & CONTINUE

The administrative page is now separated into 4 pages (Country, Training, People, and Facility Setup). The Country Setup allows the user to enable 4 new modules (Evaluation, Approvals, Historical Data, and Unknown Participants)

The Training Settings allow the user to display and modify the labels of most data fields on the Training page.

HOME
TRAININGS
PEOPLE
PLACES
REPORTS
MY ACCOUNT

Country Setup

- [Country Setup](#)
- [Provinces/States](#)
- [Districts](#)

Training

- **Training Settings**
- [Training Category](#)
- [Assign Titles](#)
- [Training Title](#)
- [Training Organizer](#)
- [Training Level](#)
- [Training Topic](#)
- [PEPFAR Category](#)
- [Funding](#)
- [Recommended Topic](#)
- [Nat. Curriculum](#)
- [Training Method](#)

People

- [People Settings](#)
- [Qualifications](#)
- [Responsibility](#)
- [Trainer Types](#)
- [Trainer Skills](#)
- [Languages](#)
- [Affiliations](#)
- [Titles](#)
- [Suffix](#)
- [Active Trainer](#)

Facilities

- [Facilities Settings](#)
- [Facility Types](#)
- [Facility Sponsors](#)

Users

Training Settings

Field	Display	Label	Options
Training category		<input type="text" value="Training category"/>	Add/Edit
Training name		<input type="text" value="Training name"/>	Add/Edit
Training organizer		<input type="text" value="Training organizer"/>	Add/Edit
End Date	<input type="checkbox"/>		
Training level		<input type="text" value="Training level"/>	Add/Edit
PEPFAR Category		<input type="text" value="PEPFAR category"/>	Add/Edit
Training topic	<input checked="" type="checkbox"/>	<input type="text" value="Training topic"/>	Add/Edit
Training method	<input type="checkbox"/>	<input type="text" value="Training Method"/>	Add/Edit
TOT	<input checked="" type="checkbox"/>	<input type="text" value="Training of Trainers"/>	
Funding			Add/Edit
Funding Amount		<input type="text" value="Funding Amount"/>	
Nat. Curriculum	<input type="checkbox"/>	<input type="text" value="National curriculum"/>	
Nat. Curriculum Comment	<input type="checkbox"/>	<input type="text" value="National curriculum con"/>	Add/Edit
Refresher Course	<input type="checkbox"/>	<input type="text" value="Refresher course"/>	
Comments		<input type="text" value="Comments"/>	
Course Objectives	<input checked="" type="checkbox"/>	<input type="text" value="Course Objectives"/>	
Primary language	<input type="checkbox"/>	<input type="text" value="Primary Language"/>	Add/Edit
Secondary language	<input type="checkbox"/>	<input type="text" value="Secondary Language"/>	
Pre test score	<input checked="" type="checkbox"/>	<input type="text" value="Pre test score"/>	
Post test score	<input checked="" type="checkbox"/>	<input type="text" value="Post test score"/>	
Custom field 1	<input checked="" type="checkbox"/>	<input type="text" value="Training Partners"/>	
Custom field 2	<input type="checkbox"/>	<input type="text" value="Custom field 2"/>	

The People Settings allow the user to display and modify the labels of most data fields that relate to people, including participants, trainers, and non-attached people.

Field	Display	Label	Options
Is Active	<input checked="" type="checkbox"/>	Is active	
Title	<input checked="" type="checkbox"/>	Title	Add/Edit
First Name		First Name	
Middle Name	<input type="checkbox"/>	Middle Name	
Last Name		Last Name	
Suffix	<input type="checkbox"/>	Suffix	Add/Edit
National ID	<input type="checkbox"/>	National ID	
File Number	<input type="checkbox"/>	File Number	
Age	<input type="checkbox"/>		
Home Address fields	<input type="checkbox"/>		
Home phone	<input checked="" type="checkbox"/>		
Second email	<input type="checkbox"/>		
Fax	<input checked="" type="checkbox"/>		
Qualification			Add/Edit
Recommended topics			Add/Edit
Responsibility			Add/Edit
Custom field 1	<input type="checkbox"/>	Custom field 1	
Custom field 2	<input type="checkbox"/>	Custom field 2	
Active trainer			Add/Edit
Trainer types			Add/Edit
Trainer skills			Add/Edit
Languages			Add/Edit
Affiliations	<input type="checkbox"/>		Add/Edit

The Facility Settings allow the user to modify data points relating to facilities.

Field	Display	Label	Options
Facility	<input type="checkbox"/>	Facility	
Facility Types	<input type="checkbox"/>		Add/Edit
Facility Sponsors	<input type="checkbox"/>		Add/Edit

In addition to the customizations mentioned above the user now has the ability to set a default value for many of the data points. To set a default, navigate to the options page for the specific data point from the hyperlinks on the left hand side. There is a column with radio buttons entitled default, clicking the button next to the value will set that value as a default. Clicking it again will turn it off or you can click another value. You do not need to specify a default but it may help reduce data entry errors if many of your values are consistent



The following fields allow the user to set a default:

- Training – Training Organizer, Training Level, Training Topic, PEPFAR Category, Funding
- People – Qualification

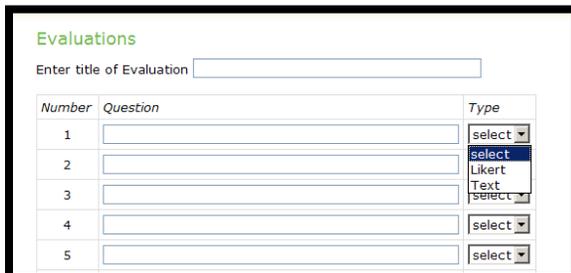
New Modules

Evaluations

This functionality can be found as a new header on the menu bar and can be enabled with a check box under My Account > Country Setup



Clicking on “Add New Evaluation” creates a template to build an evaluation. The user has the ability to type in up to 20 questions and have the answers either be a text box or likert scale.



Once the Evaluation is created it can be printed and/or assigned to a training. When clicking assign, the user will get a screen that displays the trainings in the system and the evaluation can be linked to one or many trainings.

Assign	ID	EngenderHealth Topic Area	Title of Event or Training	Start Date	Organizer (Field Office or Sub-Grantee)	Location
<input type="checkbox"/>	47	Family Planning	OralPill	2010-06-12	EngenderHealth	Bagamoyo Beach Resort
<input type="checkbox"/>	61	HIV/AIDS	Counseling and Testing Training	2010-06-01	EngenderHealth	ATP Conference Room
<input type="checkbox"/>	39	Family Planning	Implant	2010-03-23	ITECH	
<input type="checkbox"/>	71	HIV/AIDS	HIP	2010-03-22	EngenderHealth	Meru Hospital
<input type="checkbox"/>	76	Family Planning	Condom	2010-03-14	EngenderHealth	Meru Hospital
<input type="checkbox"/>	75	Family Planning	Counseling	2010-03-14	EngenderHealth	
<input type="checkbox"/>	79	Family Planning	Implanon Skills Training	2010-03-03	EngenderHealth	
<input type="checkbox"/>	24	PMTCT		2010-03-01	MOH	Hilton Hotel

Once the evaluation is assigned to a training, a hyper link will appear on the training page that will allow the user to enter or view the data.

HOME	TRAININGS	PEOPLE	PLACES	REPORTS	EVALUATIONS	MY ACCOUNT
View/Edit Training SAVE TRAINING						
EngenderHealth Topic Area		Family Planning			ID 47	
*Title of Event or Training		Oral/Pill			Date created: 2010-01-22 11:04:54	
		Insert new			Created by: Kate Waldman	
*Training start date		Day 12 / Month 06 / Year 2010			Date modified: 2010-03-02 09:15:12	
					Modified by: Akuba Dolphyne	
*Training end date		Day 16 / Month 06 / Year 2010			View/Print Training Roster	
					Enter Evaluation Data View Data	
*Training length		5 <input type="radio"/> hours <input checked="" type="radio"/> days <input type="radio"/> weeks			Duplicate this Training	
					Delete this Training	
Organizer (Field Office or Sub-Grantee)		EngenderHealth Insert new				

To enter the data, the user will be shown the evaluation that looks like the printed version and will be able to enter answers for each person that took the evaluation. There is no way to link the evaluation to a specific individual

HOME	TRAININGS	PEOPLE	PLACES	REPORTS	EVALUATIONS	MY ACCOUNT
Evaluation Data Entry						
Oral Pill Eval - Oral/Pill						
1 How useful was this training to you?						
<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5						
2 Would you recommend this training to a colleague?						
<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5						
3 How soon do you plan to implement the recommendations of this training?						
<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5						
4 Any other comments?						
<input type="text"/>						
<input type="button" value="SAVE AND CONTINUE"/> <input type="button" value="SAVE AND EXIT"/>						

Clicking “View Data” will produce an HTML report that can be copied and pasted into excel for more analysis. The report will show each response and an average for likert scale questions.

```
Evaluation Name: pmctc
Question: how was the hotel
Type: Likert
Responses(0):

Evaluation Name: Oral Pill Eval
Question: How useful was this training to you?
Type: Likert
Responses(6): 1(1) 2(0) 3(2) 4(1) 5(2) average: 3.5

Evaluation Name: Oral Pill Eval
Question: How useful was this training to you?
Type: Likert
Responses(0): 1(1) 2(0) 3(2) 4(1) 5(2) average: 3.5

Evaluation Name: pmctc
Question: how was the food
Type: Likert
Responses(0): 1(1) 2(0) 3(2) 4(1) 5(2) average: 3.5

Evaluation Name: Oral Pill Eval
Question: Would you recommend this training to a colleague?
Type: Likert
Responses(6): 1(1) 2(0) 3(1) 4(2) 5(2) average: 3.66666666666667

Evaluation Name: Oral Pill Eval
Question: Would you recommend this training to a colleague?
Type: Likert
Responses(0): 1(1) 2(0) 3(1) 4(2) 5(2) average: 3.66666666666667

Evaluation Name: pmctc
Question: other comments
Type: Text
Responses(0):
```

Historical Data

TS can now track changes made for certain fields on a person’s record. This functionality can be enabled with a check box under My Account > Country Setup. Once enabled, a box will appear at the bottom of the person’s record and will display date of change, what field was changed, and the old value. The fields that will be tracked are:

- First name
- Last name
- Prefix
- Suffix
- Gender
- Birth date/age
- Facility
- Qualification
- Responsibility
- Active trainer
- Trainer type
- Trainer affiliation
- Trainer skills
- Primary language

Class History

ID	Start Date	Name	Topics(s)	Location
52	2010-01-18	Family Planning Counseling Training	Counseling, Family Planning/Reproductive Health, Female Sterilization, IUD, LAMP, Male Sterilization	Papa Motel Garden
46	2009-09-13	Family Planning Counseling Training	(n/a)	Health Laboratory Assistant Training Centre

[Assign this person to a class](#)

External Class History

Name	Start Date	Length	Location	Who Funded

[Add an external class](#)

Change History

Date	Change	Previous entry
2010-01-19 07:56:14	Birthdate	0000-00-00
2010-03-04 09:23:08	Last Name	Mblao

[SAVE CHANGES](#)

Unknown Participants

TS will now allow trainings to be entered where the participant names are not known. This functionality can be enabled with a check box under My Account > Country Setup. When the user is entering a new training there is now a check box entitled "Participants are Known". The default is checked (on). If the user wants to enter a training where participant names are not known they should de-select this box.

Add New Training

EngenderHealth Topic Area

*Title of Event or Training [Insert new](#)

*Training start date Day / Month / Year

*Training end date Day / Month / Year

*Training length hours days weeks

Organizer (Field Office or Sub-Grantee) [Insert new](#)

Training location [Insert new](#)

Sub Topic [Insert new](#)

Participants are known

[SAVE AND CONTINUE](#)

Once the initial data is entered and "Save and Continue" is selected, there is a section where number of participants based on primary qualification can be entered. The System will total the results at the bottom of the section. The user is only able to select primary qualification and not secondary qualification.

Participant Qualifications

Laboratory

Nurse

Physician

[Add another qualification](#) Total 55

Under trainings > View/Edit Trainings there are a series of radio buttons that will allow the user to return trainings with known participants, Trainings with unknown participants, or all trainings. The default is all trainings if nothing is selected.

Start date Day / Month / Year

End date Day / Month / Year

Trainings with known participants only
 Trainings with unknown participants only
 All trainings

There are currently no reports for this data.

Approvals

TS has the ability to not allow a training entered by a data entry person to be published until it is approved by a supervisor or manager. This functionality can be enabled with a check box under My Account > Country Setup. Once a user is added to the system there is check-box that will give permissions to approve trainings.

Edit Account

*First Name

*Last Name

*Login

*E-mail

New password

Confirm new password

Access Level

Trainings Add/Edit/Delete View only
 People Add/Edit/Delete View only
 Reports View/create reports
 Admin Edit country options Add/Edit users
 Add Training Titles
 Approval Approve trainings

If this box is not checked, each training the person enters will require approval to be included as a training. If a person is an approver they will see a table on their home page with trainings waiting for approval. They have the ability to approve or reject a training and/or leave comments.

Course Name	Start Date	Training Center	Created By	Message
Condom	2010-03-14	Meru Hospital	Kate DataEntryOnly	this need participant
Condom	2010-02-02	ATP Conference Room	jee cool	Still not good
Treatment	2009-12-12	null	Akuba Dolphyne	
COPE Training	2009-01-04	null	Akuba Dolphyne	

The approver can click on the training and they are taken to the full training information page where they will see radio buttons to approve or reject a training and a comment box. If a training is rejected they can add a comment as to why or what additional information is needed. This feature was intended to increase data quality.

The screenshot shows a section titled "Approval Status". It contains two radio buttons: "Approved" (which is selected) and "Rejected". Below these is a text input field labeled "Comments". At the bottom right of the section is a green button labeled "SAVE TRAINING".

Other New Features

Document Upload

The functionality now exists to attach documents to a training. TS will allow the user to upload a word, excel, or pdf document that is less than 10MB. At the bottom of the view/edit training page the user will see an Attached Document section. This section allows the user to upload a document from their computer and will track who uploaded it, when, and the size of the file. Clicking on the hyperlink will open the file in whatever format it was saved in.

The screenshot shows a section titled "Attached Documents". It contains a table with the following data:

Filename	Size	Author	Upload Date	
TrainSMARTCountryStatus.doc	0.03MB	Kate Waldman	2010-03-04 09:58:05	Delete

Below the table is a "Document Upload" section with a text input field, a "Browse..." button, and an "Upload" button. Below the input field, it says "Allowed file extensions: doc docx xls xlsx pdf" and "Max upload size: 10M".

Funding

TS will now track a dollar amount for funding of a training. On the View/Edit Training page there is now a box to input a dollar amount for 1 to many funders. As an example, if USAID and I-TECH both funded a training at \$2500 this can now be captured.

The screenshot shows a section titled "Funding" with the text "Check all that apply below" and a link "Insert new". It contains a list of funding sources, each with a checkbox and a dollar amount input field:

- CDC \$
- Funding 1 \$
- Funding 2 \$
- Funding 3 \$
- ITECH \$
- MOH \$
- USAID \$

Personal Address Information

A person's address was the address of their workplace but now TS has the ability to capture address information for a person. Reporting is tied to a person's workplace address. These fields can be turned on/off

Address and Phone

Address 1

Address 2

Pays

City/Town

Postal code

Home phone

Work phone

Mobile phone

Email

Email Secondary

Fax

External Class

If a person in the database has taken a class that was not captured in TS that class can still be tracked for the person. On the person's page there is now the ability to upload basic information about a class that was taken when the class has not been entered into TS. The system will capture training name, date, length, location, and who funded. There is no reporting on this information.

Name	Start Date	Length	Location	Who Funded
PMTCT	2010-03-01	5	atlanta US	CDC

[Add an external class](#)

New Fields

Training End Date

There is now a training End Date that can be turned on/off. Using this will calculate training length

HOME TRAININGS PEOPLE PLACES REPORTS EVALUATIONS MY ACCOUNT

View/Edit Training SAVE TRAINING

EngenderHealth Topic Area

*Title of Event or Training [Insert new](#)

*Training start date Day / Month / Year

*Training end date Day / Month / Year

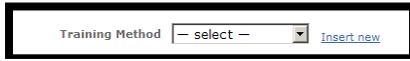
*Training length hours days weeks

ID 47
Date created: 2010-01-22 11:04:54
Created by: Kate Waldman
Date modified: 2010-03-02 09:15:12
Modified by: Akuba Dolphyne

[View/Print Training Roster](#)
[Enter Evaluation Data](#) [View Data](#)
[Duplicate this Training](#)
[Delete this Training](#)

Training Method

A new drop down box in trainings that can be turned off/on



Training Method [insert new](#)

Primary and Secondary Language

Two new drop down boxes in trainings that can be turned off/on



Primary Language
Secondary Language

National Id Field

A second National Id field in a person's record that can be turned off/on



National ID
__file_number__

Age

For those people where a birth date is not known age can be entered. When an age is entered it will calculate the birth date to January 1 of the year born. As an example age 40 is entered the birth date will be set to 1/1/1970. Entering in a birth date will also auto calculate the age



Birth date Day / Month / Year
Age

Reports

Data Downloads

Under the reports tab there is a new section entitled data downloads. There are three downloads under this option, people data, facility data, and training data.



HOME	TRAININGS	PEOPLE	PLACES	REPORTS	EVALUATIONS	MY ACCOUNT
Data Downloads				Training Reports		
People Data				Participant Reports		
Facilities Data				Trainer Reports		
Trainings Data				Facility Reports		
				Roster Reports		
Developed and funded by I-TECH. For ques				Data Downloads here.		

When any of the hyper links are clicked on all data points will be downloaded to a raw HTML format. From here the data can be copy and pasted into excel for further analysis

```
id 2
uuid
first_name John
middle_name "Smithy"
last_name Smith
national_id
file_number
birthdate 1910-12-03
gender na
phone_work
phone_mobile
fax
phone_home
email
email_secondary
comments
home_address_1
home_address_2
home_postal_code
active active
timestamp_created 2010-01-05 14:24:17
timestamp_updated 2010-01-05 14:39:37
created_by 1
modified_by 1
qualification Mid-Level Clinician
facility_name Medical Center A
courses
  40, Family Planning Counseling Training
```

```
id 2
facility_name Medical Center A
uuid
address_1
address_2
postal_code
phone
fax
facility_comments
modified_by
created_by 1
timestamp_updated 2010-01-05 14:24:03
timestamp_created 2010-01-05 14:24:03
city_name
district_name unknown
province_name Testing
facility_type Government
facility_sponsor unknown
```

Condom

```
id 41
has_known_participants no
training_start_date 2010-02-02
training_end_date 2010-02-10
training_length_value 1
training_length_interval day
uuid
comments
got_comments
objectives
is_approved no
is_tot no
is_refresher no
pre
post
modified_by 1
created_by 6
timestamp_updated 2010-02-05 18:52:53
timestamp_created 2010-01-12 11:03:55
training_location_name ATP Conference Room
training_got_curriculum n/a
training_level Level 1
city_name Dar es Salaam
district_name unknown
province_name Testing
custom1 n/a
custom2 n/a
training_organizer ITECH
training_method Traditional
language n/a
funding n/a
pepfar_category Testing and Counseling
training_topic n/a
```