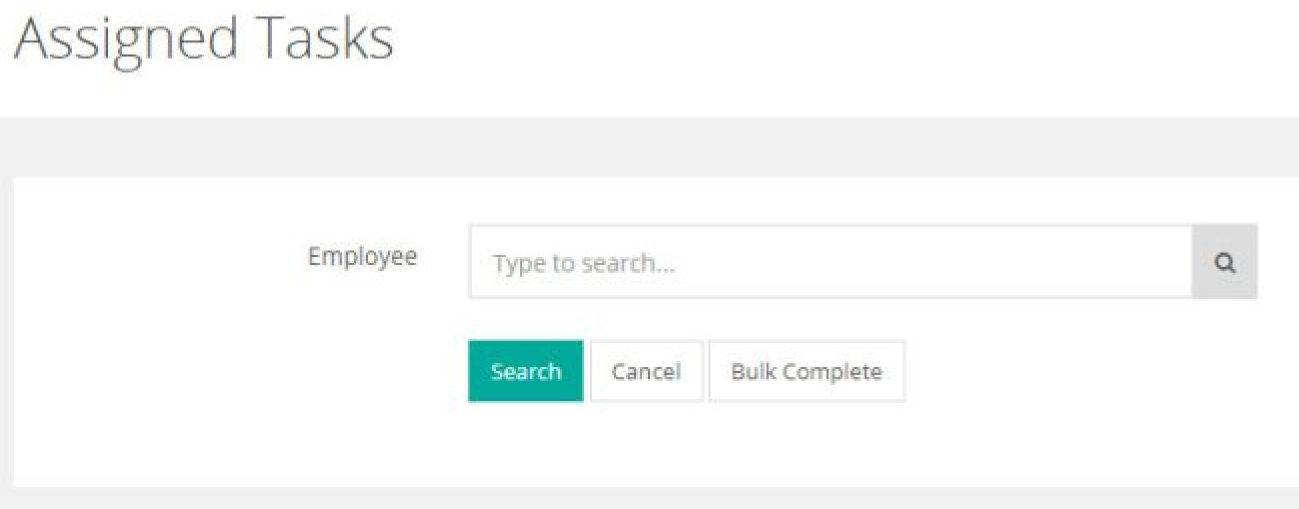
Employee Tasks

Employee Tasks are a great mechanism for **Admins** to help their **Employees** work through a set of tasks that need to be completed. **Employee Tasks** can be assigned individually to those **Employees** who need to complete these **Tasks**. Alternatively you can also assign them in a grouped set **Tasks** called a **Task Pack** to the **Employees** that needs to complete these items. This feature will keep them tracking their progress if you choose to have them login as well.

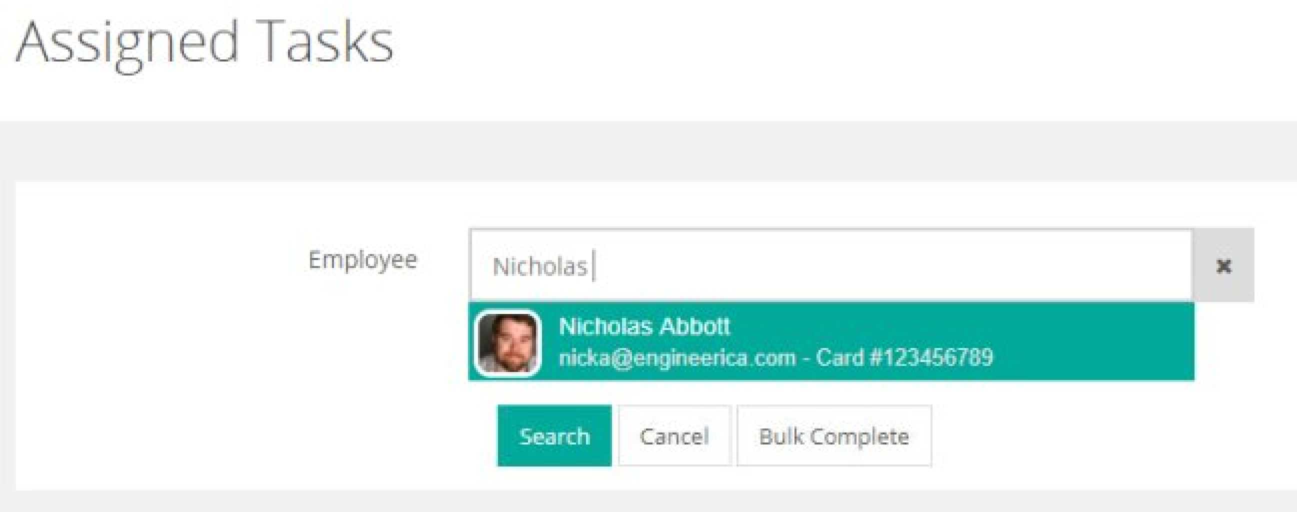
All Assigned Tasks

How to Access: Employee Tasks > All Assigned Tasks

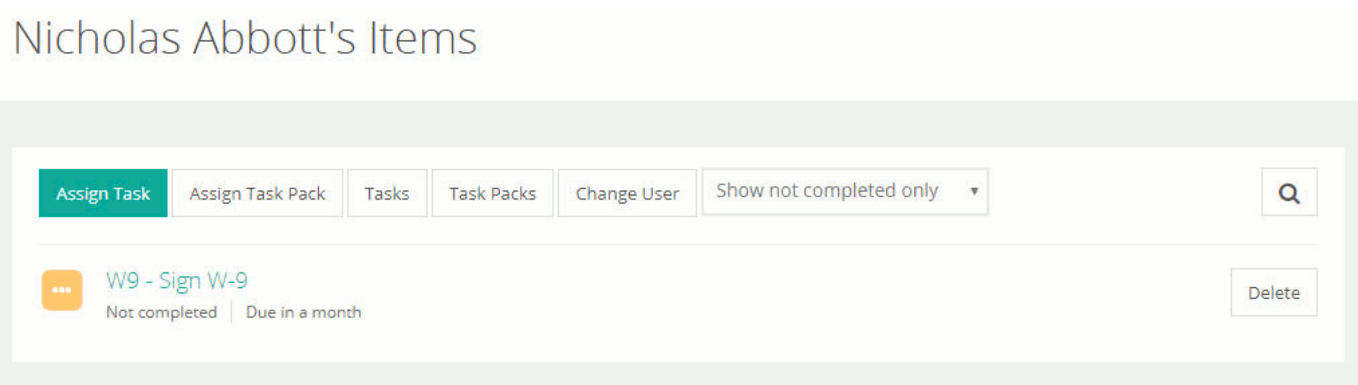
Purpose: Used to view/manage all **Tasks** assigned to **Employees** in **AccuTraining**. This section allows you to add/remove **Tasks** or **Task Packs** (groups of **Tasks**) from an **Employee's Assigned Tasks**.



Simply search for the **Employee**, click on them,



and then click the **Search** button to pull their **Tasks** for them in AccuTraining.



All Assigned Tasks Buttons

When you get to this section there are several buttons that are useful when managing a **Employee's Task Packs**:

- **Assign Task** - This option allows you to choose from existing **Tasks** to assign to the **Employee** selected.
- **Assign Task Pack** - This option allows you to choose from existing **Task Packs** to assign to the **Employee** selected.
- **Tasks** - This option allows you to go to the area to create **Tasks**.
- **Task Packs** - This option allows you to go to the area to create **Task Packs**.
- **Change User** - This option allows you to change the **Employee** that you want to assign **Tasks** and/or **Task Packs**.
- **Completion Level filter** - While viewing the selected **Employee** you can alter the view with the following options:
  - **Show all** - This option shows all **Tasks** or **Task Packs** assigned to the **Employee** currently selected.
  - **Show due only** - This option shows all **Tasks** or **Task Packs** that are due now for the currently selected **Employee**.
  - **Show not completed only** - This option shows all the incomplete **Tasks** or **Task Packs** for the currently selected **Employee**. This is the default view when accessing the **All Task Packs** section.
  - **Show completed only** - This option shows all the completed **Tasks** or **Task Packs** assigned to the currently selected **Employee**.

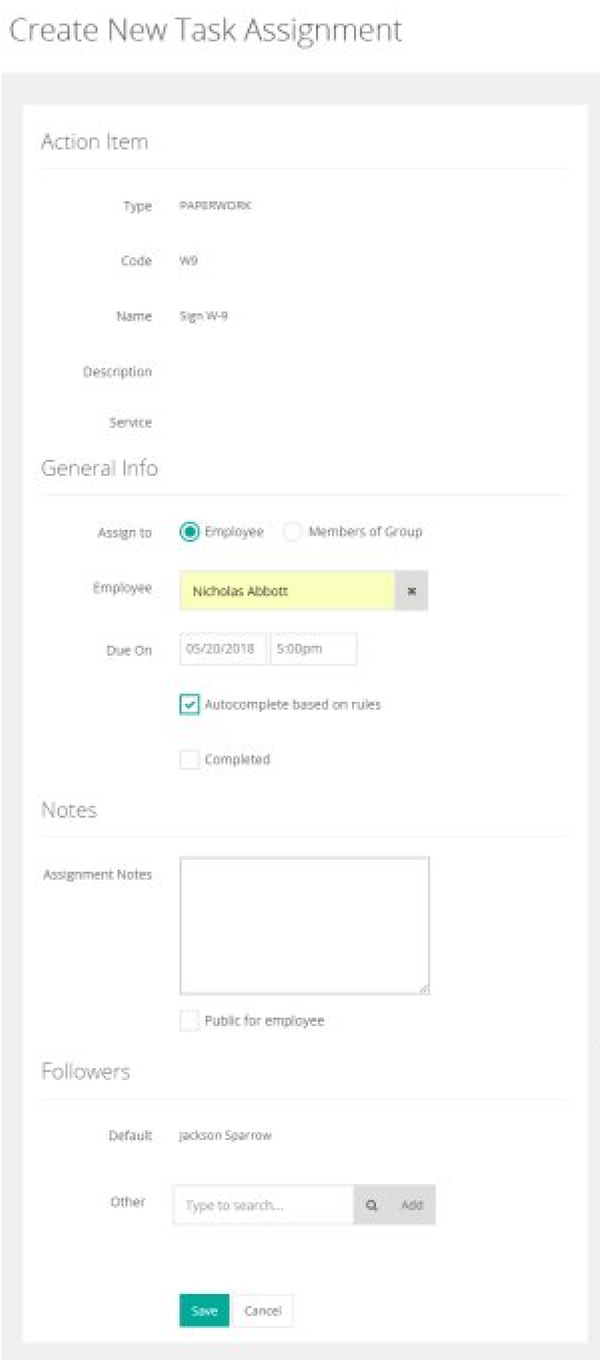
- **Search (Magnifying Glass)** - This allows you to search for **Tasks** or **Task Packs** that are in the current view you have selected.

Task Pack List Options

- **Task/Task Pack Name** - Click on the title of the **Tasks** or **Task Packs** to manually update the status of this item or add/view notes about this **Task** or **Task Pack**.
- **Status Quick Filter** - Click on the magnifying glass or title of the **Status** listed directly below the **Task** or **Task Pack** title of a particular item to see all **Tasks** that are currently set to that status.
- **Delete** - This option is located on the far right of each **Employee's** Task Packs' **Tasks** or **Task Packs** to remove an item that is no longer necessary to complete or placed on the **Employee** by accident. You should receive a warning though to avoid any accidental deletions.

All buttons and options may not be present unless you have access to them as a **Administrator**.

Assign Task



Task

- **Task** - Select from the available previously created **Tasks** that you want to assign to the **Employee** you've selected. If you accidentally choose the wrong **Task** in the list you have an **(edit)** option that appears so you can change it once something has been selected.

General Information

- **Employee** - This is simply the **Employee** you have selected to be assigned this **Task**.
- **Due On** - Set a date that this **Task** assignment is due on.
- **Autocomplete based on rules** - Check this option if you want the rules to handle marking completed.

- **Completed** - Used to mark the **Task** completed.

Notes

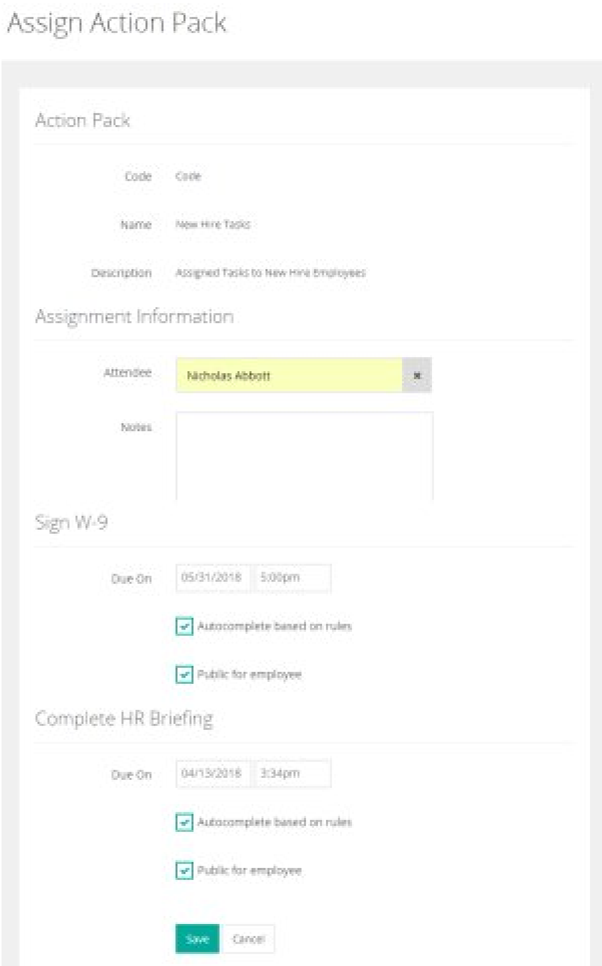
- **Assignment Notes** - These are notes you can add about why this **Task** being assigned to the **Employee**.
  - **Public for Employee** - This option makes this note visible to the Employee.

Followers

- **Other** - This is where you search for **Users** that you want to be emailed updates about the progress of the selected **Employee** on the completion of this **Task**.

As the **Employee** attempts to complete or completes this **Task** you can add additional notes that you can choose to share with the **Employee** or not and mark as completed when done. This **Task** can be also be marked completed by rules that you have setup in AccuTraining.

Assign Task Pack



Task Pack

- **Task Pack** - Select from the available previously created **Task Packs** that you want to assign to the **Employee** you've selected. If you accidentally choose the wrong **Task Pack** in the list you have an **(edit)** option that appears so you can change it once something has been selected.

Assignment Information

- **Employee** - This is simply the **Employee** you have selected to be assigned this **Task Pack**.
- **Notes** - These are notes you can add about why this **Task** being assigned to the **Employee**.

List of Tasks

Each **Task** will be listed that is in the **Task Pack** so you can assign the due dates, decide whether or not to share the notes with each item, and choose if the completion should be marked based on rules.

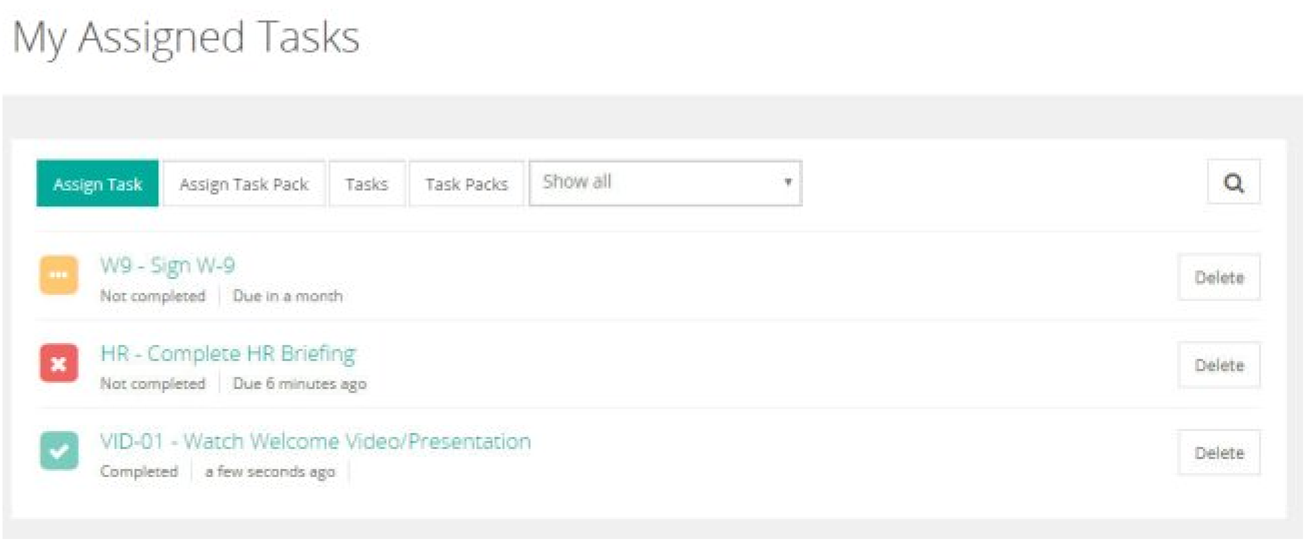
- **Due On** - Set a date that this **Task** assignment is due on.
- **Autocomplete based on rules** - Check this option if you want the rules to handle marking completed.
- **Public for Employee** - This option makes the notes visible to the **Employee**.

As the **Employee** attempts to complete or completes each **Task** in this **Task Pack** you can add additional notes that you can choose to share with the **Employee** or not and mark as completed when done. As well followers can be added to each **Task** later in AccuTraining.

My Plan

How to Access: Employee Tasks > My Plan

Purpose: Used by **Employees** to view **Tasks** and **Task Packs** needing to be completed in their individual **Task Pack** in AccuTraining.



My Plan Buttons

- **Completion Level filter** - While viewing your **My Plan** you can alter the view using the

following options:
  - **Show all** - This option shows all **Tasks** or **Task Packs** assigned to you.
  - **Show due only** - This option shows all **Tasks** or **Task Packs** that are due now for you.
  - **Show not completed only** - This option shows all the incomplete **Tasks** or **Task Packs** for you. This is the default view when accessing the **All Task Packs** section.
  - **Show completed only** - This option shows all the completed **Tasks** or **Task Packs** assigned to you.

My Plan List Options

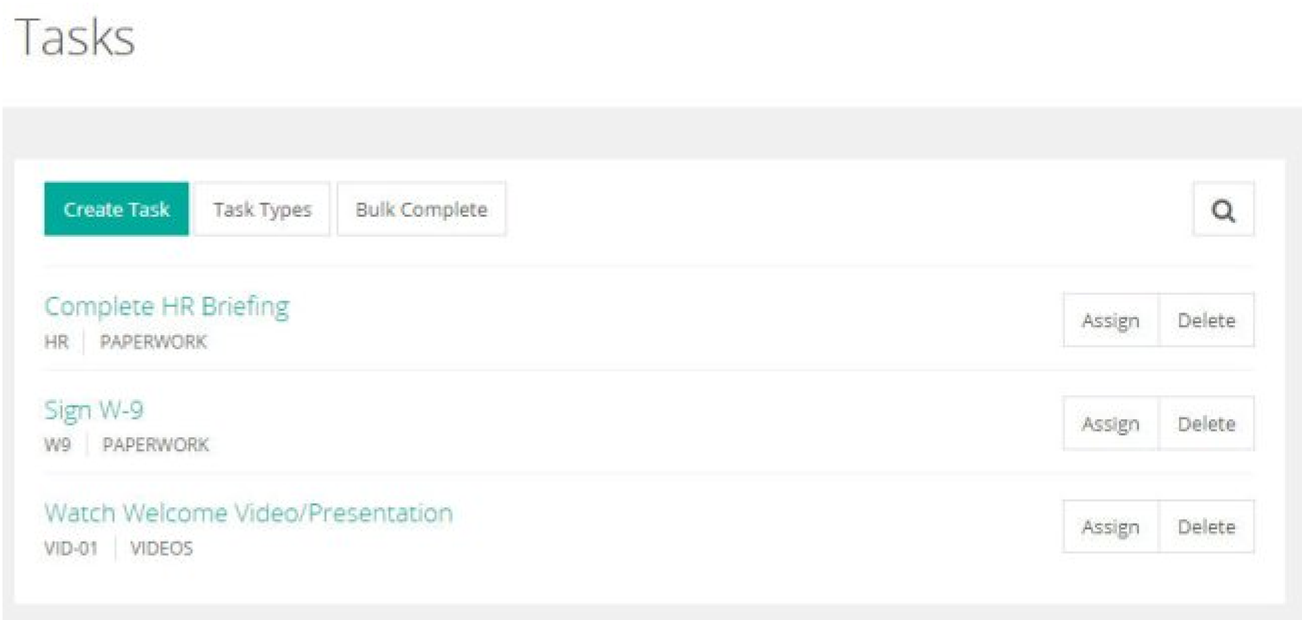
- **Task/Pack Name** - Click on the title of the **Tasks** or **Task Packs** to manually update the status of this item or add/view notes about this **Task** or **Task Pack**.
- **Status Quick Filter** - Click on the magnifying glass or title of the **Status** listed directly below the **Task** or **Task Pack** title of a particular item to see all **Tasks** that are currently set to that status.
- **Delete** - This option is located on the far right of each Employee's Task Packs' **Tasks** or **Task Packs** to remove an item that is no longer necessary to complete or placed on the Employee by accident. You should receive a warning though to avoid any accidental deletions.

As an Admin you can view this section although if you are not an **Employee** in the system as well it may not contain any information. You can make yourself an **Employee** however to test assignment rules and/or manually assigning **Tasks** or **Task Packs** to your account.

Tasks

How to Access: Employee Tasks > Tasks

Purpose: Used to view/manage the individual **Tasks** in AccuTraining. These **Tasks** can be grouped into **Task Packs** or they can be assigned directly to an **Task Pack** for a **Employee**.



Tasks List Buttons

When you get to this section there are several buttons available to manage the **Tasks** available to assign to a **Employee's Task Pack**:

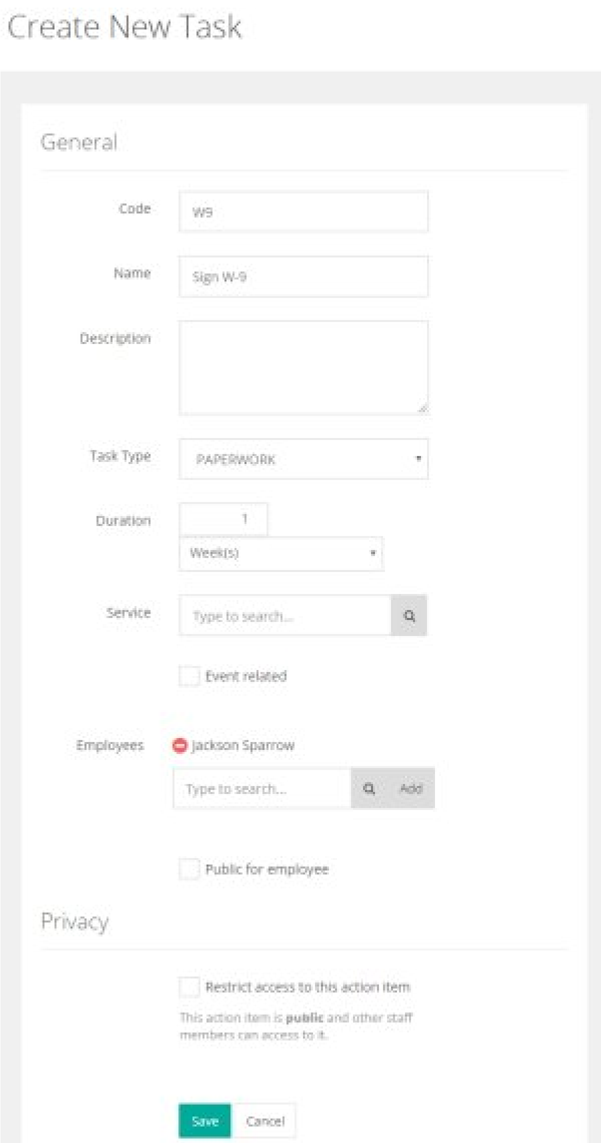
- **Create Task** - This option allows you to create an **Task**.
- **Task Types** - This option takes you to the section to manage **Task Types**.
- **Search (Magnifying Glass)** - This allows you to search for **Tasks** that are in the current view you have selected.

Tasks List Options

- **Task Name** - Click on the title of the **Tasks** to manually edit this **Task**.
- **Task Type Quick Filter** - Click on the magnifying glass or title of the **Task Type** listed directly below the **Task** title of a particular item to see all **Tasks** of a particular type.
- **Assign** - This option allows you to assign the selected **Task** to a **Employee** from this screen.
- **Delete** - This option is located on the far right of each **Task** to remove an item that is no longer needed or added by accident. You should receive a warning though to avoid any accidental deletions.

Create Task

From the previous screen this is what loads and options you have when you click the **Create Task** button.



General Info

- **Code** - This is a unique code for this **Task** which can be used when pulling reports to show the completion of the specific **Task**.
- **Name** - This is what is displayed to the Employee and is the title or name of the **Task**.
- **Description** - This is an optional field used to help provide more information that may help a user decide whether or not to assign this particular **Task** to a **Employee**.
- **Task Type** - This is a list of existing **Task Types** that have been created to allow you to categorize the **Tasks** but if you do not have any you can save the **Task** for now, create an **Task Type** (shown below), and update this information on the **Task** later.
- **Duration** - This is the estimated duration the appointment/session should last to complete this **Task**.

Training Course

- **Service** - This is where you can associate **Services** with a particular **Task**.
- **Event related** - This is if you want to see available **Seminars** or **Courses** as options in the above list as well.

Followers

- **Users** - This is to assign particular **Users** that would need to be notified about this **Task** being assigned to a **Employee**. They will receive e-mail updates when there are changes made to this **Task** such as being assigned, removed, or updated.

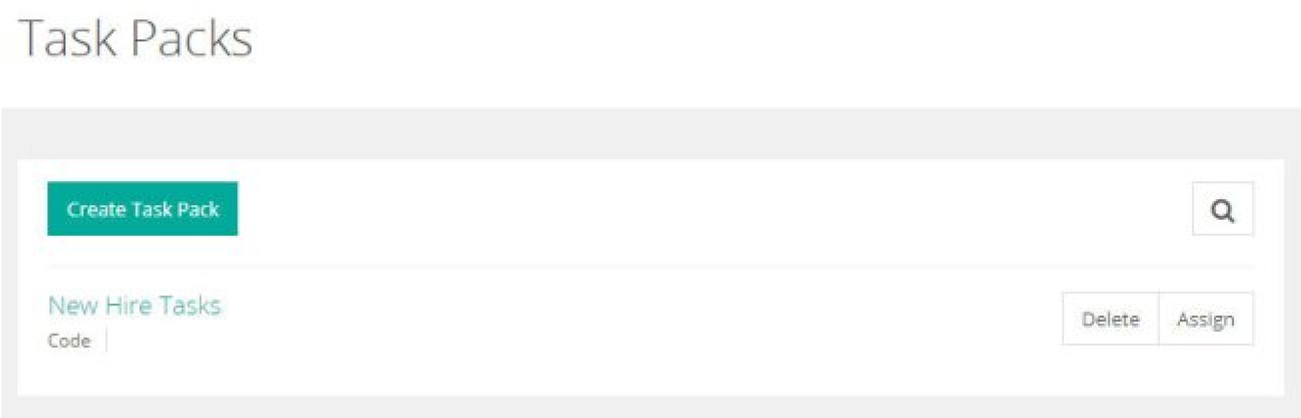
Visibility

- **Public for Employee** - This allows this option to be made available for **Employees** to assign to themselves.

Task Packs

How to Access: Employee Tasks > Task Packs

Purpose: Used to view/manage the **Task Packs** that consist of **Tasks** that need to be completed by **Employees** in AccuTraining. Here you can add/remove **Tasks** to/from an **Task Pack**.



Task Packs List Buttons

When you get to this section there are several buttons available to manage the **Task Packs**:

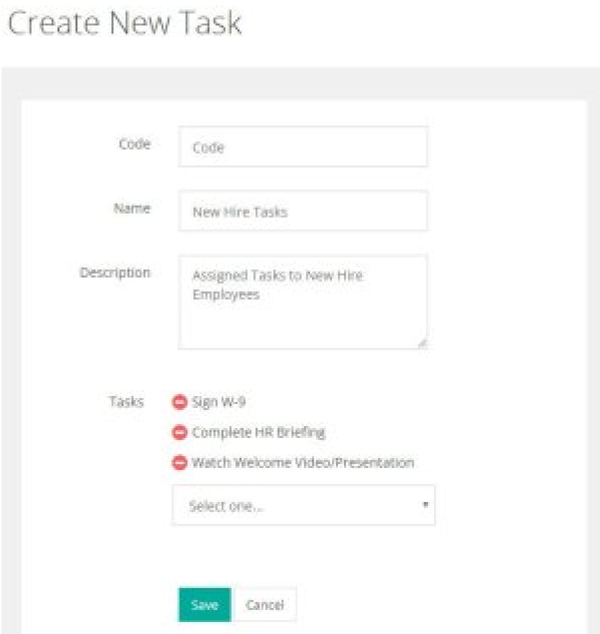
- **Create Task Pack** - This option allows you to create an **Task Pack**.
- **Search (Magnifying Glass)** - This allows you to search for **Task Pack** that are in the current view you have selected.

Task Packs List Options

- **Task Pack Name** - Click on the title of the **Task Pack** to manually edit this **Task Pack** and all of its options.
- **Delete** - This option is located on the far right of each **Task Pack** to remove an pack that is no longer needed or was added by accident. You should receive a warning though to avoid any accidental deletions.

Create Task Pack

From the previous screen this is what loads and options you have when you click the **Create Task Pack** button.

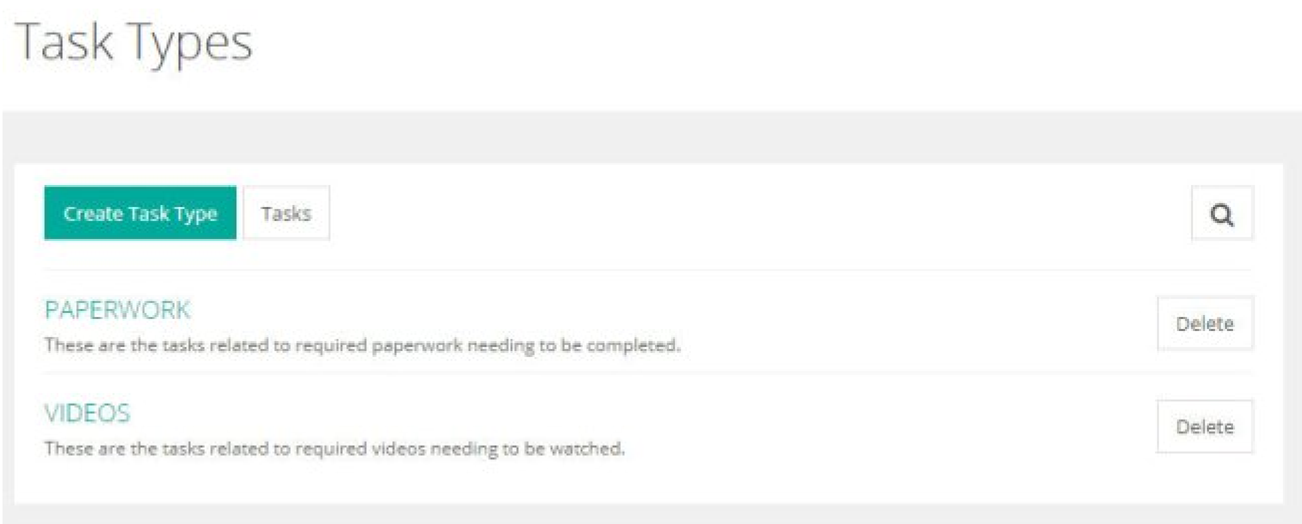


General Info

- **Code** - This is a unique identifier to quickly find the **Task Pack** when assigning it to a **Employee**.
- **Name** - This is the name or title that you'll see when assigning the **Task Pack** to a **Employee**.
- **Description** - Used to help describe the reason for the **Task Pack**.
- **Tasks** - These are the **Tasks** that make up this **Task Pack**. Note that the **Tasks** must exist prior to creating this **Task Pack** in order to see them in the list, but you can save this **Task Pack** and update it later if you have not already created all the **Tasks** needing to be completed in this **Task Pack**.

Task Packs can help you tremendously by not having to assign individual **Tasks** to a **Employee**.

Task Types



Task Types Buttons

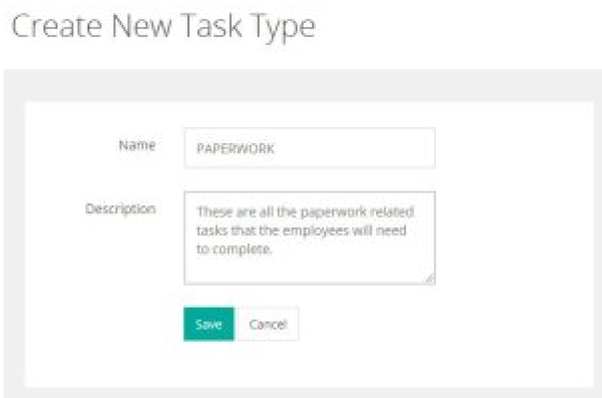
When you get to this section there are several buttons available to manage the **Task Types** available when you create **Tasks**:

- **Create Task Type** - This option allows you to create an **Task Type**.
- **Tasks** - This option takes you back to the **Tasks**.
- **Search (Magnifying Glass)** - This allows you to search for **Tasks** that are in the current view you have selected.

Task Types Options

- **Task Type Name** - Click on the title of the **Task Type** to manually edit this **Task Type** and all of its options.
- **Delete** - This option is located on the far right of each **Task Type** to remove an type that is no longer needed or was added by accident. You should receive a warning though to avoid any accidental deletions.

Create Task Type



From the previous screen this is what loads and options you have when you click the **Create Task Type** button.

General Info

- **Name** - This is a brief category descriptor for your **Tasks**.
- **Description** - This is a description that may help an **Admin** decide what **Task Type** or category an **Task** belongs.

Creating **Task Types** may be something that you want to discuss with your **Admins** and **Implementation specialists** on what will work best for your **Institution**.

Reports

In this section you can access all the Reports for **AccuTraining**. Here is a list of the available reports with a brief explanation of each type and individual report:

Session Registration Reports

These are reports that show the **Session Registration** to your **Training Courses**.

Registration and attendance

Shows the registration and the attendance for a specific session.

Training Plan Reports

These are reports that show the **Training Plans** status by the **Employee Groups** assigned or individuals.

Training plan progress

Displays the training progress for everyone in a plan.

Training progress by employee

Displays the training progress for a specific employee.

Employee Reports

User List

Lists all users in the system, including name, card number and email address.

User List with Tags

Lists all users in the system, including name, card number, email address and tags.

Staff List

Lists all staff members in the system, including name, card number and email address.

Permissions by User

Lists all the users in the system with their corresponding security permissions.

Visit Reports

These are reports that show the visits/swipes/attendance in the **Training Courses** in many various ways. Some are summaries while others are detailed so run them to see which meet your reporting needs.

Location general stats

Shows the general stats of a specific location.

Employee attendance

Shows the attendance information of an employee.

Summary of Attendance

The report gives you a summary of the number of non-unique students seen and total time.

Detailed Attendance

Provides detailed information about students and their attendance. The report lists each student. Under the name, it lists the classes this student attended. For each class, the report lists the attendance sessions (sign-in date and time, sign out date and time, and time spent).

New Visitors

This report lists users' first visits.

Session Comments

This report shows user sessions with comments.

Visits Detailed by Location

Lists each user that visited the location(s) during the reporting period. For each visitor the report shows the number of visits, the date and time of his or her first visit, the date and time of his or her last visit, and the average visits' time.

Visits Executive Summary

The report gives you an executive summary of visits to a location, including number of open days (any day with at least one sign-in is considered an open day), number of services offered, number of users served, total contact hours.

Zero Visits

This report lists each user that didn't visit your center during the reporting period.

Task Plan Reports

These are reports that show the **Task Plan** progress by the individuals assigned these **Tasks**.

Individual Tasks by User

Shows the tasks assigned to the students, the assigned date, deadline date, whether the item was completed, and if so, the completion date. You can also see total items assigned per student, the overall completion rate, and the percentage of items that were completed within the deadline.

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