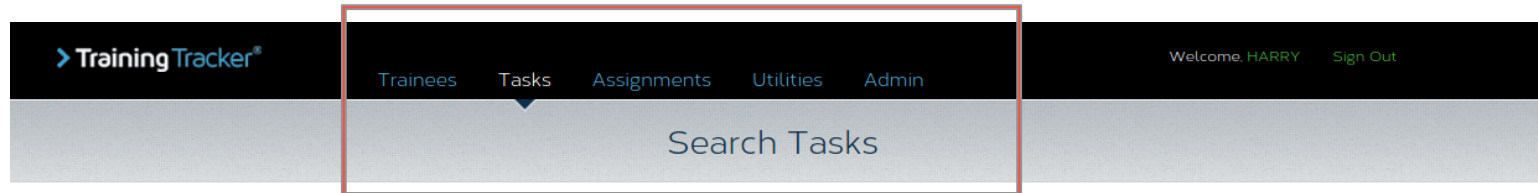




How To Add Tasks and Assign Training in Training Tracker 7 Web

computer  directions

Select the Tasks tab in the top menu



[+ Create New Task](#)

Search **Slide 1**

Division
Select division

Task name

Task type
Select task type

Include Inactive Tasks

[Search](#) [Clear All](#)

Select All

Group By: **None**

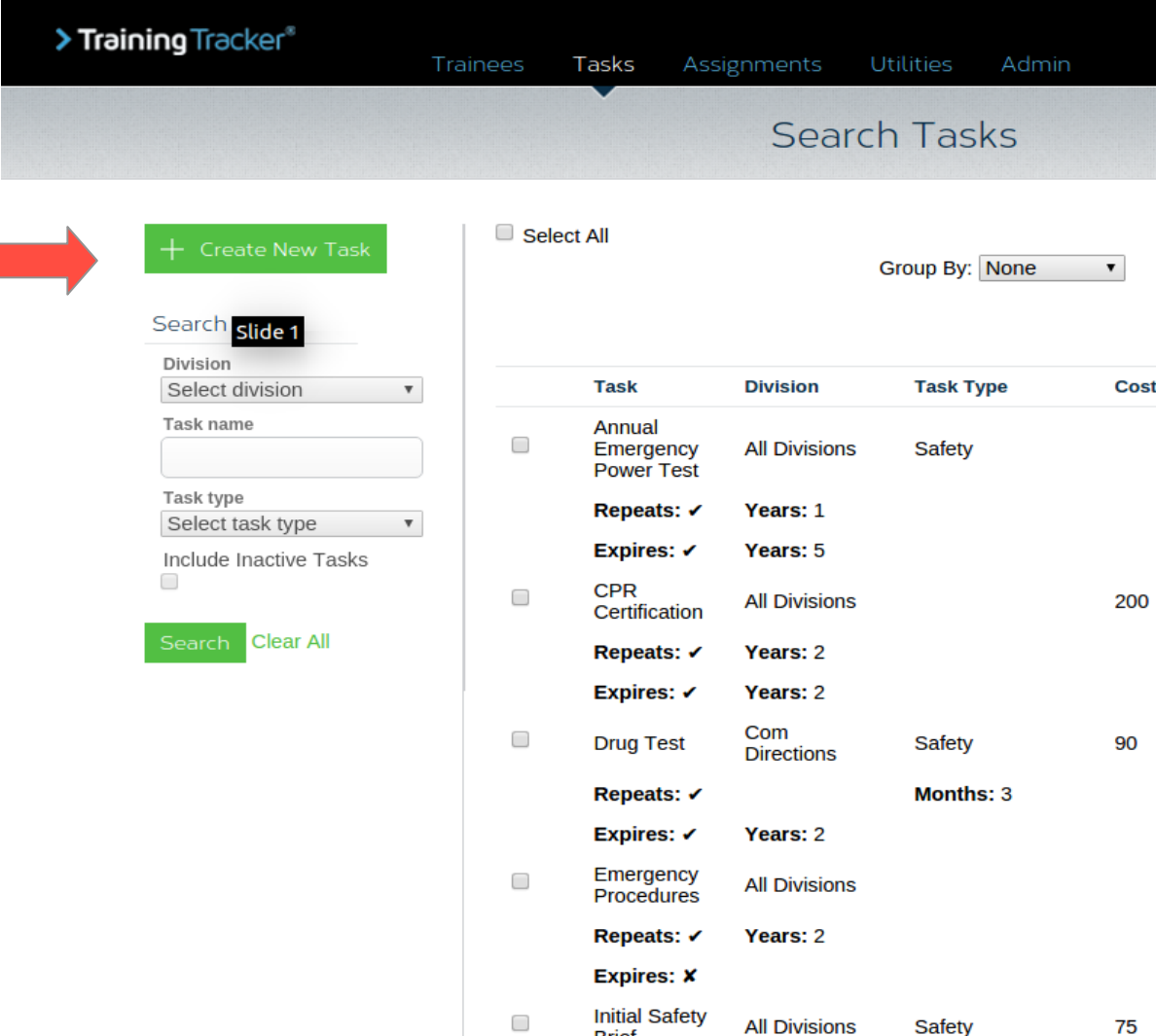
[Group Selected](#) [Delete Selected](#) [Print](#)

	Task	Division	Task Type	Cost	Hours	CEUs
<input type="checkbox"/>	Annual Emergency Power Test	All Divisions	Safety		2	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Repeats: ✓	Years: 1				
	Expires: ✓	Years: 5				
<input type="checkbox"/>	CPR Certification	All Divisions		200	1	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Repeats: ✓	Years: 2				
	Expires: ✓	Years: 2				
<input type="checkbox"/>	Drug Test	Com Directions	Safety	90		<input checked="" type="checkbox"/> <input type="checkbox"/>
	Repeats: ✓		Months: 3			
	Expires: ✓	Years: 2				
<input type="checkbox"/>	Emergency Procedures	All Divisions			2	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Repeats: ✓	Years: 2				
	Expires: ✗					
<input type="checkbox"/>	Initial Safety Brief	All Divisions	Safety	75	3.5	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Repeats: ✗					
	Expires: ✗					
<input type="checkbox"/>	Machine Tool Safety	All Divisions		140		<input checked="" type="checkbox"/> <input type="checkbox"/>
	Repeats: ✓					

Click on the Create New Task Button

On the **Tasks** tab, all existing **Tasks** are listed, click the **Add** button to add another **Task** to the list.

Existing **Tasks** can be edited by highlighting them and clicking the **Edit** button.



The screenshot shows the Training Tracker interface. At the top, there are navigation tabs: Trainees, Tasks, Assignments, Utilities, and Admin. Below the navigation is a search bar labeled "Search Tasks". A red arrow points to a green button labeled "+ Create New Task". Below this button is a search form with the following fields:

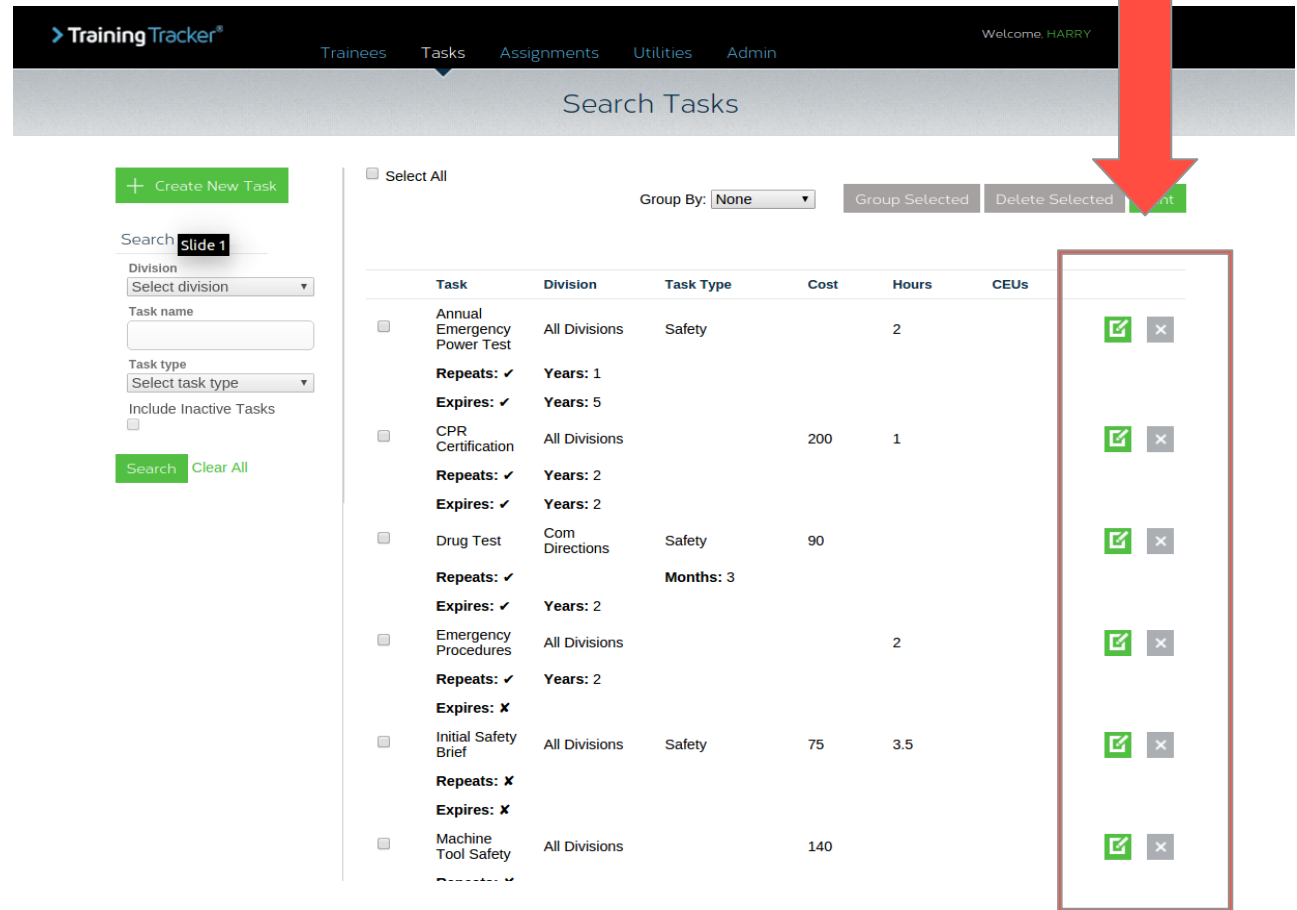
- Search: Slide 1
- Division: Select division (dropdown)
- Task name: (text input)
- Task type: Select task type (dropdown)
- Include Inactive Tasks:
- Buttons: Search, Clear All

Below the search form is a table of tasks. The table has columns for Task, Division, Task Type, and Cost. The tasks listed are:

Task	Division	Task Type	Cost
<input type="checkbox"/> Annual Emergency Power Test	All Divisions	Safety	
		Repeats: ✓	Years: 1
		Expires: ✓	Years: 5
<input type="checkbox"/> CPR Certification	All Divisions		200
		Repeats: ✓	Years: 2
		Expires: ✓	Years: 2
<input type="checkbox"/> Drug Test	Com Directions	Safety	90
		Repeats: ✓	Months: 3
		Expires: ✓	Years: 2
<input type="checkbox"/> Emergency Procedures	All Divisions		
		Repeats: ✓	Years: 2
		Expires: ✗	
<input type="checkbox"/> Initial Safety Brief	All Divisions	Safety	75

Edit a Task

A **Task** can be edited by clicking on the green button by the gray **Delete** button



The screenshot shows the TrainingTracker interface. At the top, there is a navigation bar with 'TrainingTracker' logo, 'Trainees', 'Tasks', 'Assignments', 'Utilities', and 'Admin' menus. A 'Welcome, HARRY' message is on the right. Below the navigation bar is a 'Search Tasks' section. On the left, there is a search sidebar with a '+ Create New Task' button, a search input field containing 'Slide 1', and dropdown menus for 'Division' and 'Task type'. Below the search sidebar is a 'Search' button and a 'Clear All' button. The main area displays a list of tasks with columns for 'Task', 'Division', 'Task Type', 'Cost', 'Hours', and 'CEUs'. Each task row has a checkbox on the left and two buttons on the right: a green edit button and a gray delete button. A red arrow points to the edit button of the first task, 'Annual Emergency Power Test'. A red box highlights the edit and delete buttons for all tasks in the list.

Task	Division	Task Type	Cost	Hours	CEUs
<input type="checkbox"/> Annual Emergency Power Test Repeats: ✓ Years: 1 Expires: ✓ Years: 5	All Divisions	Safety		2	
<input type="checkbox"/> CPR Certification Repeats: ✓ Years: 2 Expires: ✓ Years: 2	All Divisions		200	1	
<input type="checkbox"/> Drug Test Repeats: ✓ Months: 3 Expires: ✓ Years: 2	Com Directions	Safety	90		
<input type="checkbox"/> Emergency Procedures Repeats: ✓ Years: 2 Expires: ✗	All Divisions			2	
<input type="checkbox"/> Initial Safety Brief Repeats: ✗ Expires: ✗	All Divisions	Safety	75	3.5	
<input type="checkbox"/> Machine Tool Safety	All Divisions		140		

Enter Information

Enter the desired information in the fields and click **Save** at the bottom of the page.

The screenshot shows the 'Create New Task' form in the TrainingTracker application. The form is located on a page with a dark header containing the 'TrainingTracker' logo and navigation links for 'Trainees', 'Tasks', 'Assignments', 'Utilities', and 'Admin'. The user is logged in as 'HARRY'. The form fields are as follows:

- Task name:** A text input field.
- Division:** A dropdown menu with the text 'Select division'.
- Task Type:** A dropdown menu with the text 'Select task type'.
- Description:** A large text area for entering details.
- Cost:** A text input field.
- Class hours:** A text input field.
- CEUs:** A text input field.

Deleting a Task

A **Task** can be deleted by clicking the “X” box at the end of the row or by selecting the task with the check box and then clicking the “Delete Selection” button.

The screenshot shows the Training Tracker interface. At the top, there is a navigation bar with 'Trainees', 'Tasks', 'Assignments', 'Utilities', and 'Admin'. A search bar labeled 'Search Tasks' is present. Below the search bar, there are buttons for 'Create New Task', 'Select All', 'Group By: None', 'Group Selected', 'Delete Selected', and 'Print'. A table of tasks is displayed with columns for Task, Division, Task Type, Cost, Hours, and CEUs. Each row has a checkbox on the left and a delete button (X) on the right. Red arrows point to the checkboxes and the delete buttons. A red box highlights the checkboxes and delete buttons for the first six rows of the table.

Task	Division	Task Type	Cost	Hours	CEUs
Annual Emergency Power Test Repeats: ✓ Years: 1 Expires: ✓ Years: 5	All Divisions	Safety		2	
CPR Certification Repeats: ✓ Years: 2 Expires: ✓ Years: 2	All Divisions		200	1	
Drug Test Repeats: ✓ Expires: ✓ Years: 2	Com Directions	Safety	90		
Emergency Procedures Repeats: ✓ Years: 2 Expires: ✗	All Divisions			2	
Initial Safety Brief Repeats: ✗ Expires: ✗	All Divisions	Safety	75	3.5	
Machine Tool Safety	All Divisions		140		


Assigning Tasks (Opt. 1)

Select All

Group By:






[Assign Task](#) [Assign Group of Tasks](#) [Delete Selected](#) [Print](#)

[Print Barcodes](#)



Option 1: On the **Trainee** tab, select the people to receive a **task** by checking the boxes to the left of their names on the list.

Once selected, click the **Assign Task** button

	Name	Phone	Badge Id	Employee #	Department	Category	Job Title		
<input checked="" type="checkbox"/>	John Adams			2					
<input type="checkbox"/>	Ben Franklin			3					
<input type="checkbox"/>	Frank Sinatra			4					
<input type="checkbox"/>	Andrew smith	555-555-5555		1					

Assigning Tasks (Opt. 1)

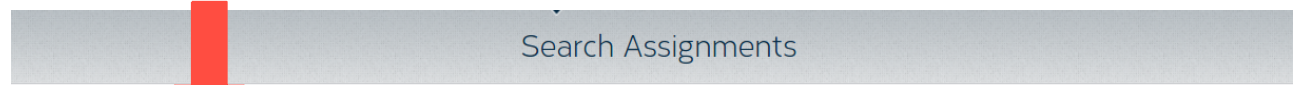
The “Assign Task” window will appear. Choose the **Task** to be assigned by selecting it on the drop-down **Task** menu. All existing tasks will appear as options.

The fields in this window may be automatically filled in with information from the **Task's** existing information, but can also be overwritten for the specific people the task is currently being assigned to.

The screenshot shows a software interface for assigning tasks. On the left, there is a search form with fields for Division, First name, Last name, Phone, Badge ID, Employee #, Department, Job Titles, Category, and dates. A green button labeled '+ Create New Trainee' is at the top left. On the right, there is a table of trainees with columns: Name, Phone, Badge Id, Employee #, Department, and Category. A green button 'Assign Task' and a red button 'Delete' are visible. A modal window titled 'Assign Task to Multiple Trainees' is overlaid on the table. The modal has a 'Task' dropdown menu (highlighted with a red box), 'Due Date' and 'Completed Date' fields, a 'Notes' text area, 'Cost', 'CEUs', 'Class Hours', and 'Grade' fields. At the bottom of the modal are 'Add' and 'Cancel' buttons.

Name	Phone	Badge Id	Employee #	Department	Category	Jc
John			2			

Assigning Tasks (Opt. 2)



Go to the **Assignments** Tab, which lists all current assignments with relevant dates.

To assign a new task click on the **Create New Assignment** button

+ Create New Assignment

Search

Division

Select division

Trainee name

Select trainee

Department

Select department

Job title

Select job title

Task name

Select task

Task type

Select task type

All Dates

Date Due

Completed Date

Expires Date

Date From

mm/dd/yyyy

Date To

mm/dd/yyyy

All Assignments

Completed Assignments

Select All

Group By:

Assign Task

Complete Selected

Delete Selected

Print

Export

Print Class Roll

1 2

	Trainee	Task	Date Due	Completed Date	Expires Date		
<input type="checkbox"/>	Sinatra, Frank	Initial Safety Brief	12/10/2015	12/10/2015		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	smith, Andrew	CPR Certificati...	12/10/2015		01/31/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Biaz, Joan	CPR Certificati...	12/10/2015		01/31/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Franklin, Ben	Initial Safety Brief	12/11/2015	12/18/2015		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Buckley, Jeff	Machine Tool Safety	12/11/2015	12/10/2015		<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Freeman, Morgan	Initial Safety Brief	12/16/2015		01/31/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Swifty, Taylor	Initial Safety Brief	12/16/2015		01/31/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Franklin, Ben	Initial Safety Brief	12/16/2015		01/31/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Parks, Rosa	Drug Test	12/31/2015		01/31/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Kennedy, John	Drug Test	12/31/2015		01/31/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1 2

Assigning Tasks (Opt. 2)

You will be taking the **Create New Assignment** window. Here, you will be able to select the **The Trainee** and the **Task** to be assigned.

A **Due Date** and a **Completed Date** can be recorded along with any desired notes

The screenshot shows the 'Create New Assignment' form in a web application. The form is titled 'Create New Assignment' and is located under the 'Assignments' menu. The form includes the following fields:

- Trainee:** A dropdown menu with 'Franklin, Ben' selected.
- Task:** A dropdown menu with 'Initial Safety Brief' selected.
- Due date:** A text input field containing '12/11/2015'.
- Completed date:** A text input field containing 'mm/dd/yyyy'. A calendar widget is open for this field, showing the month of December 2015. The calendar has a grid with days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and dates (29, 30, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31). The date '10' is highlighted in blue.
- Notes:** A large text area for entering notes.

At the bottom of the form, there is a green 'Save Assignment' button and a 'Cancel' link.