Creating Tasks, Accomplishments, Tests, and Agendas

As you move past the initial stages of using the Epicor Learning Center, you may see a need to assign your own Agendas or customized Tests to your employees.

Maybe you have a specific set of tasks that new employees must complete when they start working.

Or, perhaps your business requires a specific certification test.

As the System Administrator, you are able to create this content.

In today's lesson, we will create a learning plan for a new employee that includes Tasks, Questions, and Tests to form a complete Agenda.

Once the employee completes the agenda, you will note it in the Learning Center and the employee is ready to work.

Let's begin with Task creation.

This can be anything that you would like your employees to do that is not contained in a Course or a Test.

Tasks can be text-based instructions or a dynamic link to web-based content.

Let's create a Task to Review the Employee Handbook.

Under the Admin tab, go to Manage Tasks and click Add New Task.

Complete the form with the Task Name and Description.

The description should include any necessary instructions required for the completion of the task.

If you want to add a URL to provide a link to a resource, enter that here.

We copied a Shortcut to the Employee Handbook in the Library.

Once all the information is entered, click Submit.

If you need to edit the task, select Browse from the Manage Tasks menu.

Locate the Task, and click Edit.

To remove a Task from the list, change the Active status to No and click Submit.

A Test is a good way to determine if employees completed the tasks assigned to them.

To add a Test Question, select the Admin Tab, go to Manage Questions, and then click Add Questions.

Enter the Question Text along with two to five possible answers.

Questions can be True/False, Multiple Choice, or Fill in the Blank.

Indicate the Correct answer by clicking the associated Radio Button.

Select the Difficulty, Category, Subcategory, and Topic.

Now click Submit.

The system displays a confirmation message indicating that you added the question successfully.

Once you add all of the questions, you are ready to create the Test.

You have the option to create a test from scratch or copy an existing test and altering it.

Let’s build a test from scratch so you can see the process.

From the Admin tab, select Manage Tests, and then select Add.

Add a Name for the test.

We recommend adding the word Test so you will know at a glance the type of assignment this is.

Then add a short Description.

Choose a Category and Subcategory, and then click Next.

Now add the Test Questions.

The list you see includes all the questions that are available to you.

These include both the Public Epicor Defined questions and any you created just for your company.

Use the fields at the top of the page to filter the list.

Type allows you to separate questions you have created from the Epicor questions by selecting User-defined Questions.

You can further refine this list by using Keyword.

Click Filter Questions when you have finished setting the parameters.

Enable the checkbox to the left of any question you want to add to your test.

The system displays a running tally here so you know how many questions you have selected.

Continue filtering and selecting questions until your test is complete.

Click Next to add the questions to your test.

Clicking the Add Questions to Test link returns you to the list of questions if you need to add more.

At this point, carefully proofread the test.

Use Edit Properties if you need to make corrections to the Test Name, Description, Category, or Subcategory.

You can correct errors in your questions by returning to Manage Questions and making your adjustments there.

You can change the question order by clicking here and dragging the question up or down to alter the position.

If you selected a question that you do not want to appear on the Test, click the Trash Can and Delete it.

This does not delete the question from the list of User Defined questions.

Once you finish, click Next.

The last step is to Publish the test. This makes it available to assign or add to an Agenda.

Tests are not available for assignment until you publish them.

Using the Save Test option allows you to return and finish it later.

If you do not want to create a Test from scratch, you can copy and edit an existing Test.

From Manage Tests on the Admin Tab, select Add.

Choose Copy an existing test.

Select the Test from the drop down list.

You must give the test a new and unique Name.

An easy way to accomplish this is by adding your company name.

You can also change the Description, Category, and Subcategory.

When finished, click Next.

Now you have the opportunity to change any of the Questions included on the original Test.

Add questions by clicking the Add Questions to Test link.

Remove Questions by clicking the appropriate Trash Can icon.

Click Next and either Publish the test or Save it for further editing.

Now that we have Tasks and Tests added to the Learning Center, we can complete our Agenda for New Employees.

From the Admin Tab, select Manage Agendas and click Add.

Here you have three choices.

You can Create an Agenda from scratch, Copy an existing agenda, or Create an agenda from a role.

We'll begin by creating a new Agenda from scratch.

Enter the Name.

For our example, we'll call this New Employee Agenda.

Enter a Description that accurately describes the Agenda's purpose.

Next, you add all of the components of the Agenda.

Select the assignment Type from the drop down menu.

Then choose the specific Assignment.

Click Add Agenda Item.

Repeat this process until you add all of your Agenda items.

You can change the order of the assignments within the Agenda or enable the Delete box to remove one.

Clicking Submit creates the Agenda and Deletes any items marked for deletion.

Now you can Publish the Agenda.

You will need to select the option to Share with users so it is available for assignment.

It's important to note that you cannot make any changes to the agenda once you publish it.

Simply Save the Agenda if you're not ready to Publish it.

Also, you cannot assign an agenda until it you Publish and Share it.

To view your Agendas navigate to Manage Agendas and click Browse.

You can see that they are listed as Published, Unpublished, or Retired.

You can only assign Published Agendas to employees. Once published, you cannot edit them.

Unpublished agendas are those you choose to Save instead of Publish. You can continue to Edit or Delete Unpublished Agendas.

A Retired Agenda is one that is no longer in use. You do have the option to republish it if needed.

You can record Employee Accomplishments on their transcripts.

Perhaps some employees have earned safety certifications or completed an educational degree.

Many times these certifications can affect insurance policy premiums and business taxes, so it's important to document them.

From the Admin Tab, select Manage Accomplishments and then click Add new accomplishment.

Complete the Name and Description fields. Make sure to list the Accomplishment as Active before continuing.

You can assign Accomplishments to an individual employee or a Group from the Assignments page.

When your New Employee has completed all of the necessary Tasks and Tests, you can indicate that they achieved this Accomplishment and are ready to move forward.

While Training on Demand offers a robust curriculum for Epicor applications, you may also have content specific to your own business that you would like to communicate.

Creating your own Questions, Tests, and Tasks allows you to accurately assess and record employee's knowledge in your specific industry.

Recording their Accomplishments boosts morale, encourages learning, and gives you an opportunity to provide any needed documentation for insurance or tax purposes.

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