Using Tasks and Accomplishments

To get the whole picture of your learner's progress, you have two extra tools to round out their knowledge: Tasks and Accomplishments.

Tasks can be used to ask your learner to do something outside of the Epicor Learning Center. This can be something like asking them to complete online CPR training or attend a forklift safety class. Maybe they need to review the employee handbook, fill out some new hire paperwork or watch an orientation video. Documents can be stored on a network drive or include a link to YouTube or other digital content. This really gives you the ability to customize your training!

Accomplishments can be thought of as recognition for completing these certain functions or programs. For example, if someone passes an online exam or receives an award, it can be added as an accomplishment and will show on their transcript.

These are useful when you need to monitor ongoing requirements to keep your employees certified or compliant.

Tasks can be included in agendas, but Accomplishments need to be granted by an administrator.

Manage Tasks

To create a task, click Admin, then Manage Tasks.

Click Add.

Give the task a name and description. If this is a task that can be performed on the web, enter a URL.

Next, choose whether to mark this task as active or not.

Finally, using the bottom controls, you can set an estimated duration in hours, minutes, or days.

Click Submit.

You'll see a confirmation message and can make any needed changes to the task while here.

Click Browse.

This screen shows all your existing tasks along with their related description. Each task can be edited by clicking the pencil icon. You can also search through your task library using the controls at the top.

Scrolling down, you can use the controls at the bottom to browse through each page of your tasks. Let's open one.

Here you can make any changes or deactivate the task.

When you have finished, click Submit.

Tasks are a great addition to your customized Agendas. You can add them just like you would a course or a test.

Manage Accomplishments

To create an Accomplishment, click Admin, then Manage Accomplishments.

Click Add.

Give this accomplishment a name and description, then choose whether you're ready for it to be used or not by setting the Active field.

Click Submit when you're ready.

You'll see a confirmation screen that shows your Accomplishment has been successfully created. You can make any additional changes needed and click Submit.

Let's look at the rest of our Accomplishments. Click Browse.

You can toggle your view between Active accomplishments and All Accomplishments, which includes inactive accomplishments. Scrolling down, you can use the controls at the bottom to move between all your pages of Accomplishments.

To edit an accomplishment, click the pencil icon. Make any necessary changes, then click Submit.

Assigning Accomplishments

Has someone on your team performed something you want to recognize? Award them an Accomplishment!

Click Assignments, then New Assignment.

Filter by Type for Accomplishment, then use the additional filters to refine your search.

I'll enter "CPR" in Keywords.

Select the Accomplishment you want to assign. Choose the employee or employees who should be awarded the Accomplishment using the dropdown.

Just like with agenda and course assignments, you can configure additional options to notify others, disable notifications, or enter notes on the assignment.

When you're ready, click Submit.

You'll see a confirmation that your assignment was successful.

Accomplishments can be viewed as part of an employee's transcripts.

Click Transcripts, then Employee Transcripts.

Search for the Employee in the dropdown, then click Search.

Click Accomplishments, and you'll see the awarded Accomplishment.

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About Epicor

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