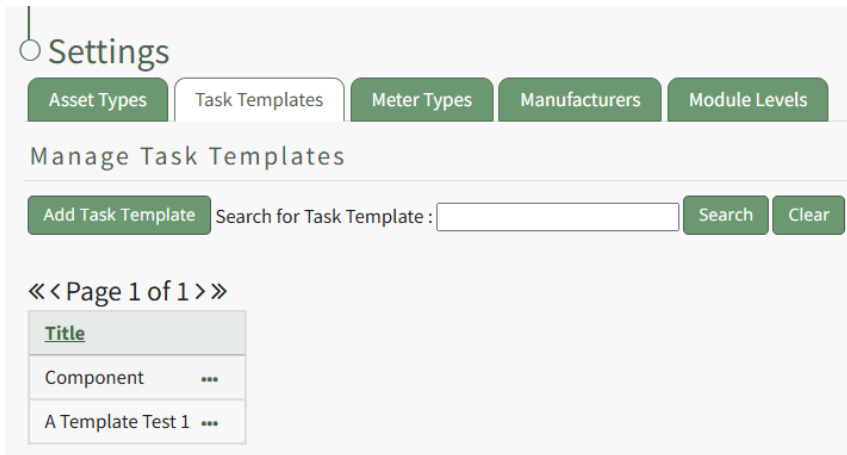
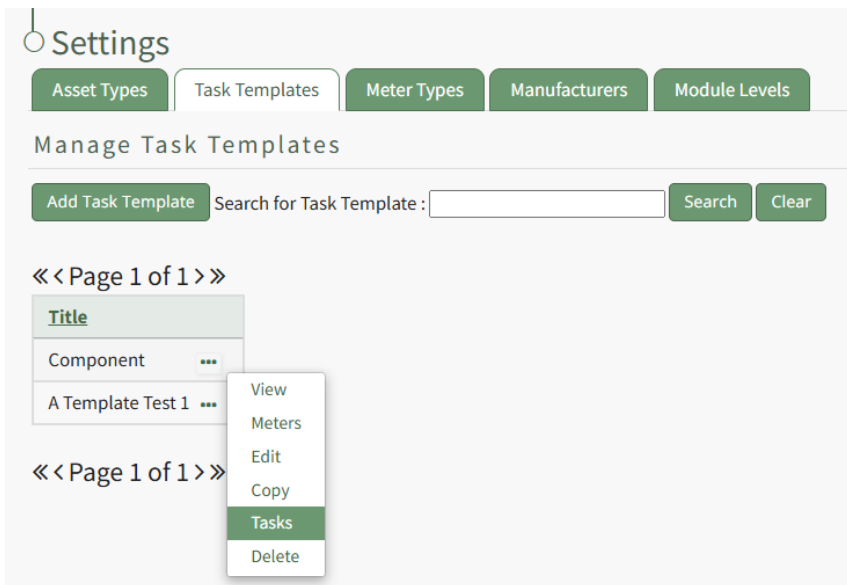


Add Tasks to a Task Template

To add tasks to a task template, go to the Task Template Tab on the Settings Page of the Assets Module.



Select the three-dot icon to the right of the task template you wish to add a task to opening the Task Template Context Menu. Select "Tasks".



This opens the Task Template Task Schedule. Select the "Add Task" button beneath the page header.

Task Schedule for template Component

Add Task

Create Permissive Group

Filters

Search

Tags

Select Some Options

Set Filter

Clear

« < Page 1 of 1 > »

<input type="checkbox"/> Title	Type	Details
Meter Test 🗨️ (0) ⋮	Regular	Every 5.0 Hours on Time (Hours)
Task with meter 🗨️ (0) ⋮	Regular	Every 48 Days

« < Page 1 of 1 > »

This opens the New Task Modal.

New Task ✕

Name *

Tags

Type *

Triggers +

Can be performed by ✕

Always show on Assets home

Hide "Notes from Task" when completing this task

When performing a task

Cost (USD)

Duration (hours)

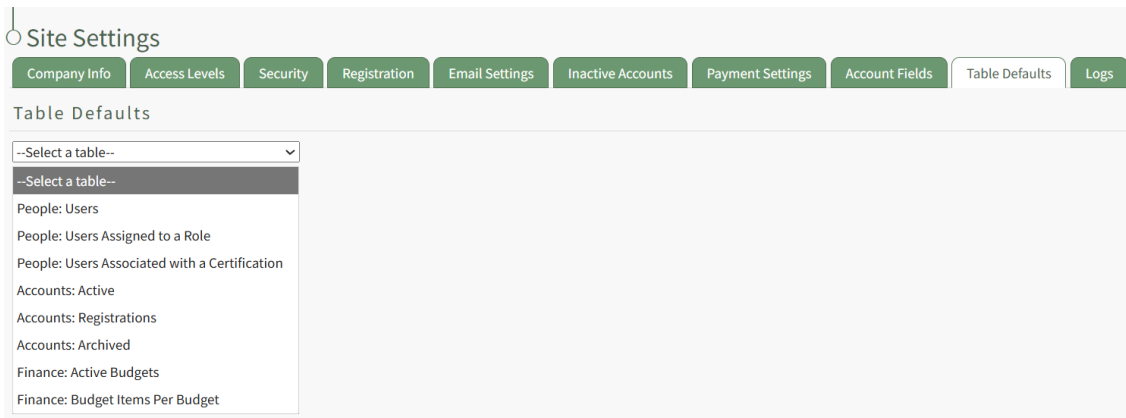
Additional information

Input the information for the New Task and select the "Save" button.

For a detailed explanation on creating new tasks, refer to the [How To Add a Task to an Asset](#).

How To: Create a New Task on the Task Schedule

There are three tables in the People Module than can be customized for your organization's specific needs.

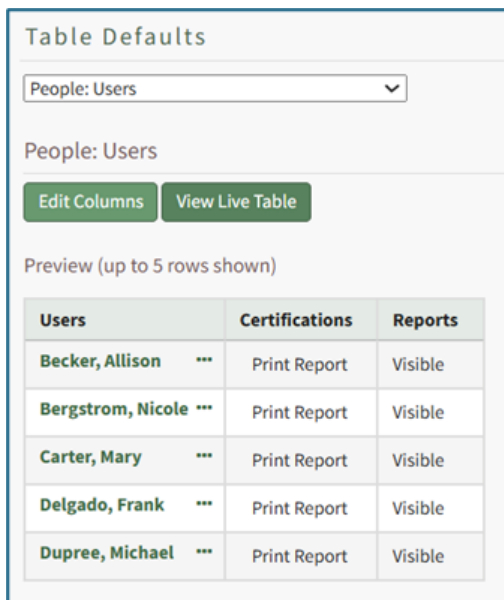


The Users Table (on the Users Page of the People Module), the Users Assigned to a Role Table (on the Assigned Users Tab of a certification role's Details Page), and the Users Associated with a Certification Table (on the Associated Users Tab of a certification's Details Page) are all customizable.

How To: Edit the People Module Users Table

To edit the Users Table in the People Module, go to the Table Defaults Tab in the Site Settings Module.

Select "People: Users" from the dropdown menu.

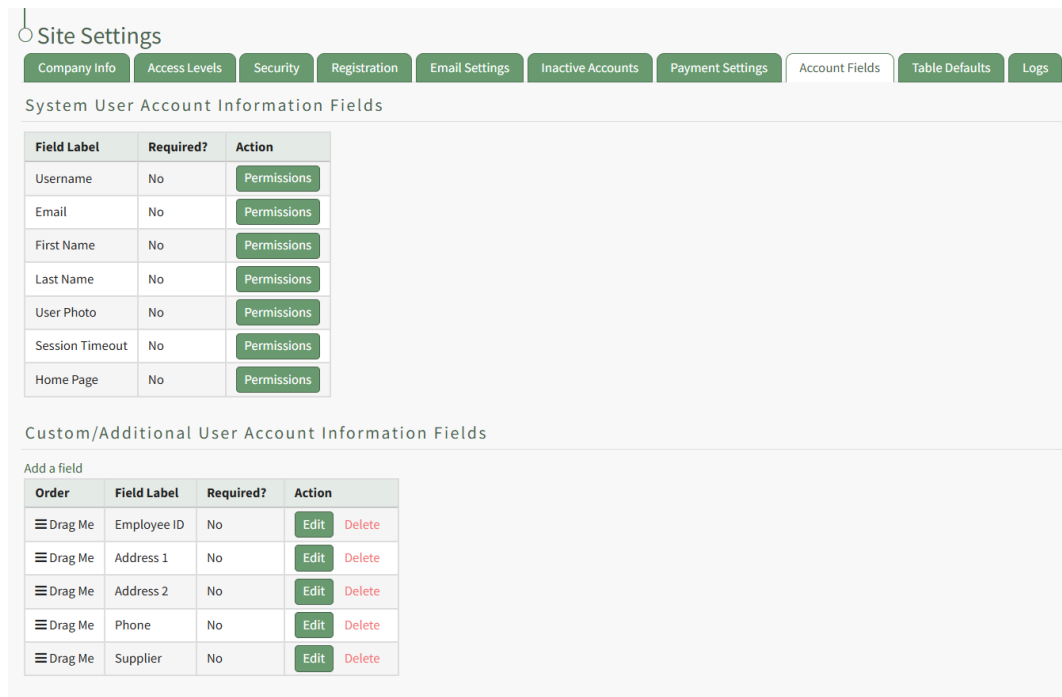


Select the "Edit Columns" button, opening the Choose Columns Modal. The default column choices include users, certifications, reports, username, email, first name, last name, employee ID, phone, Address 1, and Address 2.

Customizable account information fields can be created on the Account Fields Tab of the Site Settings Module.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.



The screenshot displays the 'Site Settings' interface with the 'Account Fields' tab selected. It is divided into two sections: 'System User Account Information Fields' and 'Custom/Additional User Account Information Fields'.

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field
X

Label *

Type *

Allow multiple values

Required

Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supervisor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Observer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged out user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

Click "Cancel" to return to the Table Defaults Tab without making any changes.

Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the People Module.

How To: Edit the People Module Users Assigned to a Role Table

To edit the Users Assigned to a Role Table in the People Module, go to the Table Defaults Tab in the Site Settings Module.

Select “People: Users Assigned to a Role” from the dropdown menu.

The screenshot shows the 'Site Settings' interface with the 'Table Defaults' tab selected. A dropdown menu is open, showing 'People: Users Assigned to a Role' as the selected option. Below the dropdown, there are buttons for 'Edit Columns' and 'View Live Table'. A preview of the table is shown below, with the following data:

Roles	Southeastern Bank of Western North Dakota All Staff								
Certifications	7 expired	7 Required	Code of Conduct	Company Onboarding - SEBWND	Confidentiality & Data Privacy Agreement - SEBWND	CPR (Quick)	Dress Code	How to Log In - SEBWND	W4 Upload
Becker, Allison	7 expired	7 expired	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on
Bergstrom, Nicole	7 expired	7 expired	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on
Carter, Mary	7 expired	7 expired	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on file.	Nothing on
Delgado, Frank	5 expired	5 expired	Nothing on file.	8/26/2028	Nothing on file.	9/8/2028 INH	Nothing on file.	Nothing on file.	Nothing on
Dupree, Michael	3 expired 1 overdue 1 due 1 deferred	3 expired 1 overdue 1 due 1 deferred 1 not applicable	Nothing on file.	5/6/2024	1/2/2026	Nothing on file.	Not Applicable	1/2/2026	Nothing on

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include name, username, email, first name, last name, employee ID, phone, Address 1, and Address 2.

Customizable account information fields can be created on the Account Fields Tab of the Site Settings Module.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

Site Settings

Company Info Access Levels Security Registration Email Settings Inactive Accounts Payment Settings Account Fields Table Defaults Logs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field X

Label *

Type *

Allow multiple values

Required

Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supervisor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Observer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged out user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

Click "Cancel" to return to the Table Defaults Tab without making any changes.

Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the People Module.

How To: Edit the People Module Users Associated with a Certification Table

To edit the Users Associated with a Certification Table in the People Module, go to the Table Defaults Tab in the Site Settings Module.

Select "People: Users Associated with a Certification" from the dropdown menu.

Table Defaults

People: Users Associated with a Certification

[Edit Columns](#) [View Live Table](#)

Preview (up to 5 rows shown)

<input type="checkbox"/>	Name	Certification Expiration Date	Attachment(s)	Time Until Expiration	Required
<input type="checkbox"/>	Becker, Allison	Nothing on file		--	Southeastern Bank of Western North Dakota All Sta
<input type="checkbox"/>	Bergstrom, Nicole	Nothing on file		--	Southeastern Bank of Western North Dakota All Sta
<input type="checkbox"/>	Carter, Mary	Nothing on file		--	Southeastern Bank of Western North Dakota All Sta
<input type="checkbox"/>	Delgado, Frank	9/8/2028 INH		2 years, 11 months	Southeastern Bank of Western North Dakota All Sta
<input type="checkbox"/>	Dupree, Michael	Nothing on file		--	Southeastern Bank of Western North Dakota All Sta

Select the "Edit Columns" button, opening the Choose Columns Modal. The default column choices include: name, username, certification expiration date, attachment(s), time until expiration, required, other required certification, email, first name, last name, employee ID, phone, Address 1, and Address 2.

Customizable account information fields can be created on the Account Fields Tab of the Site Settings Module.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

The screenshot shows the 'Site Settings' interface with the 'Account Fields' tab selected. It is divided into two sections: 'System User Account Information Fields' and 'Custom/Additional User Account Information Fields'.

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field
X

Label *

Type *

Allow multiple values

Required

Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supervisor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Observer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged out user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save
Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

Click "Cancel" to return to the Table Defaults Tab without making any changes.

Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the People Module.

Customizable user account information fields can be created and utilized in the tables as needed.

How To: Add a Custom / Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

The screenshot shows the 'Site Settings' interface with the 'Account Fields' tab selected. It displays two sections: 'System User Account Information Fields' and 'Custom/Additional User Account Information Fields'.

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field
X

Label *

Type *

Allow multiple values

Required

Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supervisor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Observer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged out user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save
Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

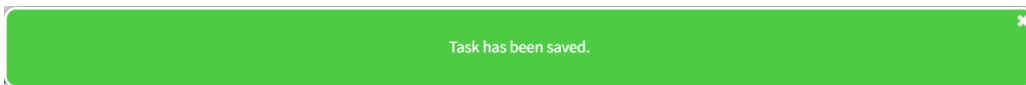
Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

A pop up confirms that the task has been saved.



The new task now shows on the task schedule for the task template.

Revision #2

Created 2026-01-11 18:02:01 UTC by Mitzi Orkus

Updated 2026-01-23 01:17:29 UTC by Mitzi Orkus