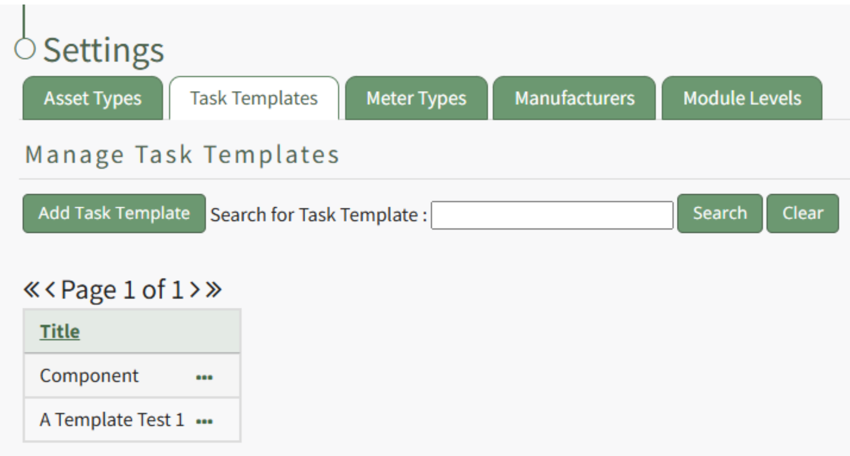
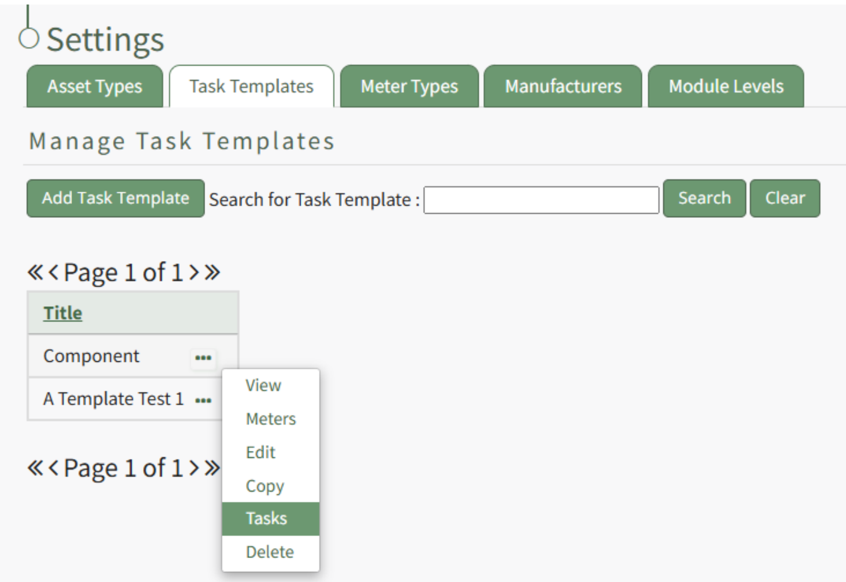
Add Tasks to a Task Template

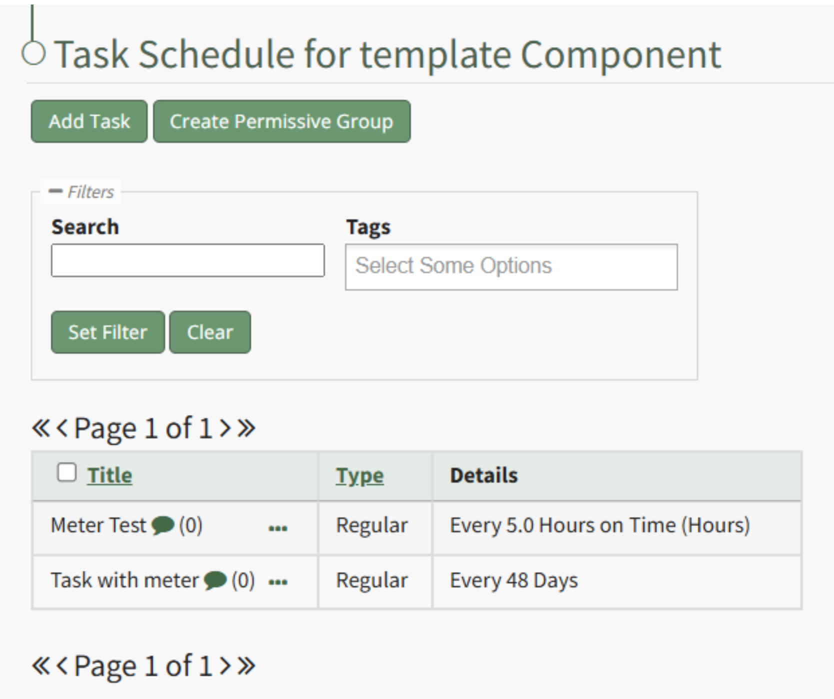
To add tasks to a task template, go to the Task Template Tab on the Settings Page of the Assets Module.



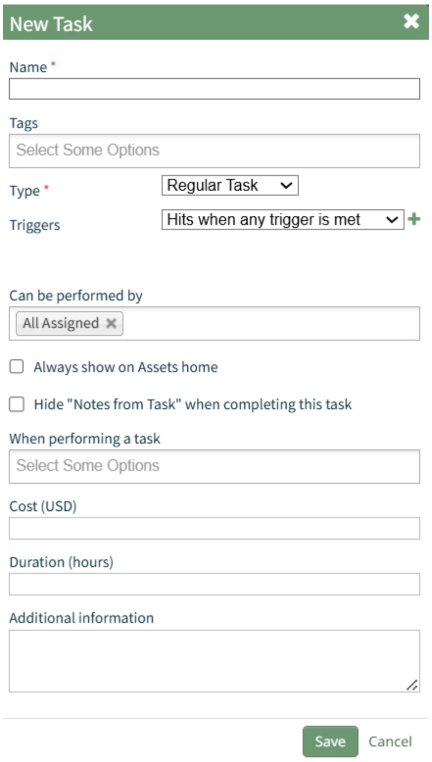
Select the three-dot icon to the right of the task template you wish to add a task to opening the Task Template Context Menu. Select "Tasks".



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



This opens the New Task Modal.

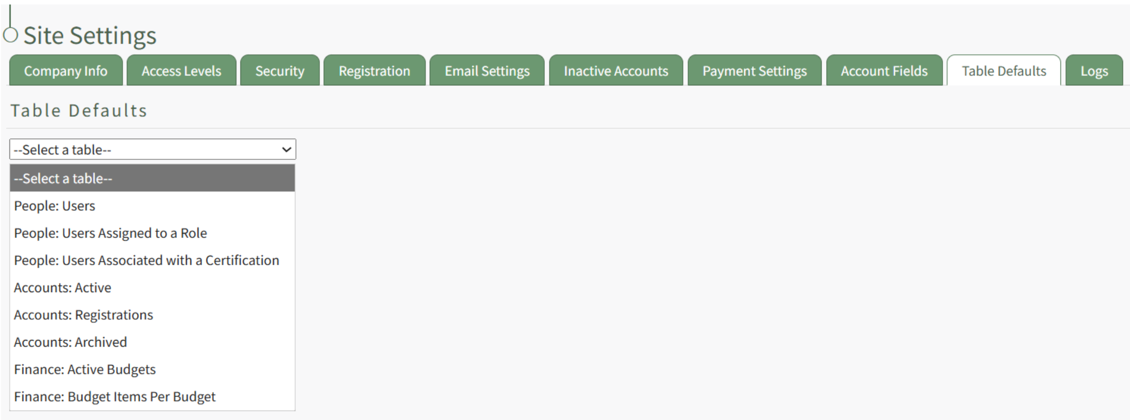


Input the information for the New Task and select the "Save" button.

> 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.

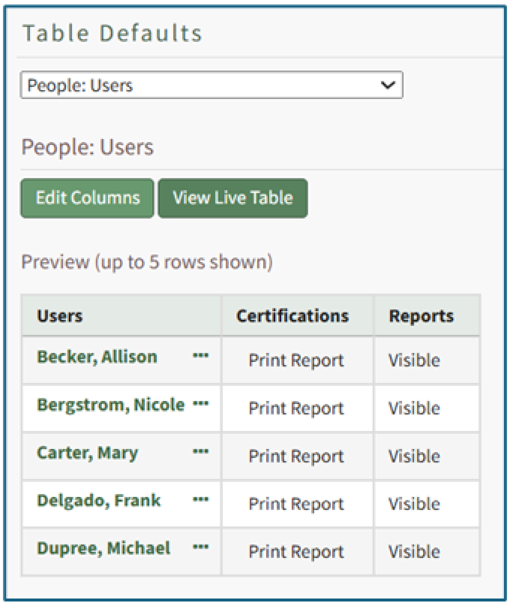


The Users Table (on the Users Page of the People Module), the Users Assigned to a Role Table (on the Assigned Users Tab of a certification role's Details Page), and the Users Associated with a Certification Table (on the Associated Users Tab of a certification's Details Page) are all customizable.

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.

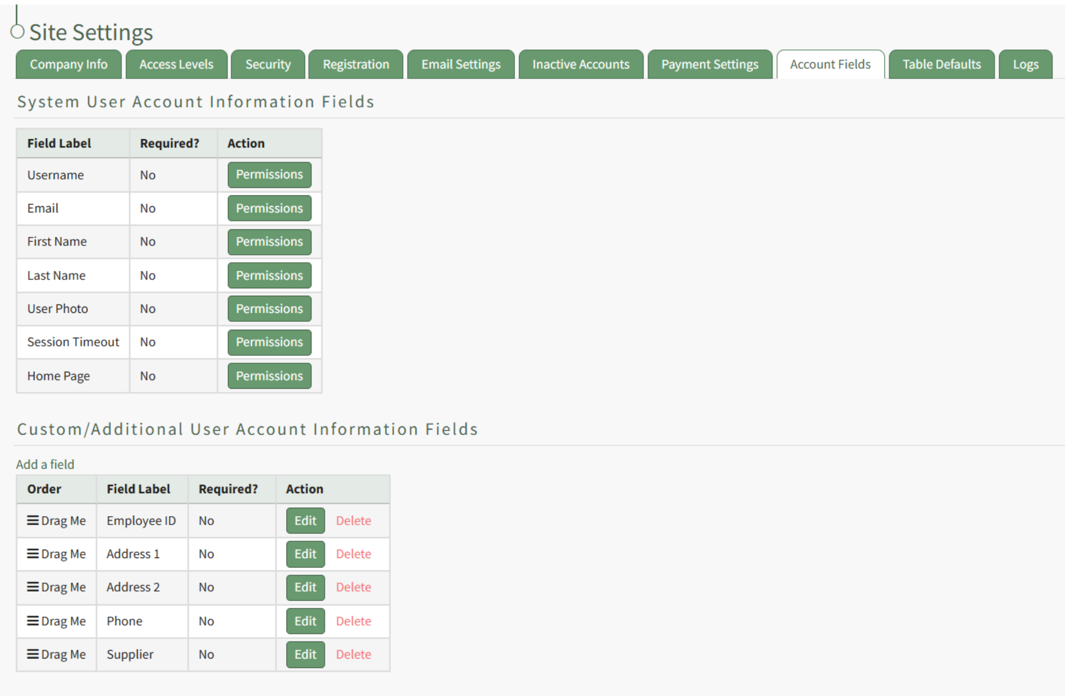


Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include users, certifications, reports, username, email, first name, last name, employee ID, phone, Address 1, and Address 2.

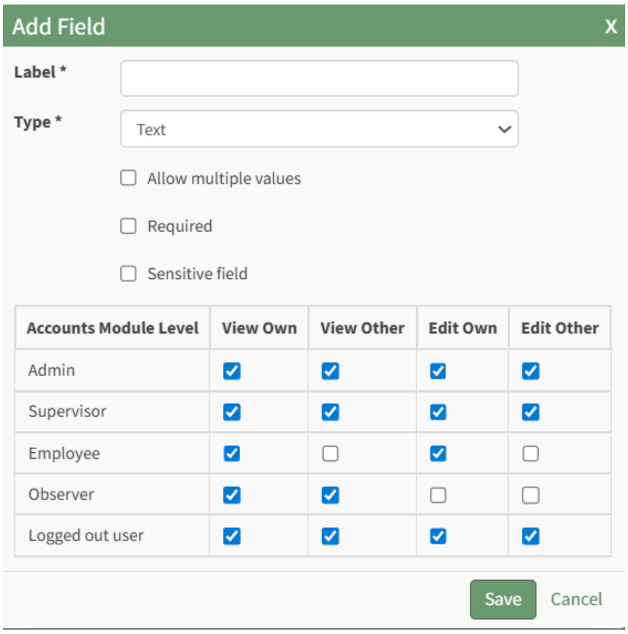
Customizable account information fields can be created on the Account Fields Tab of the Site Settings Module.

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.



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



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.

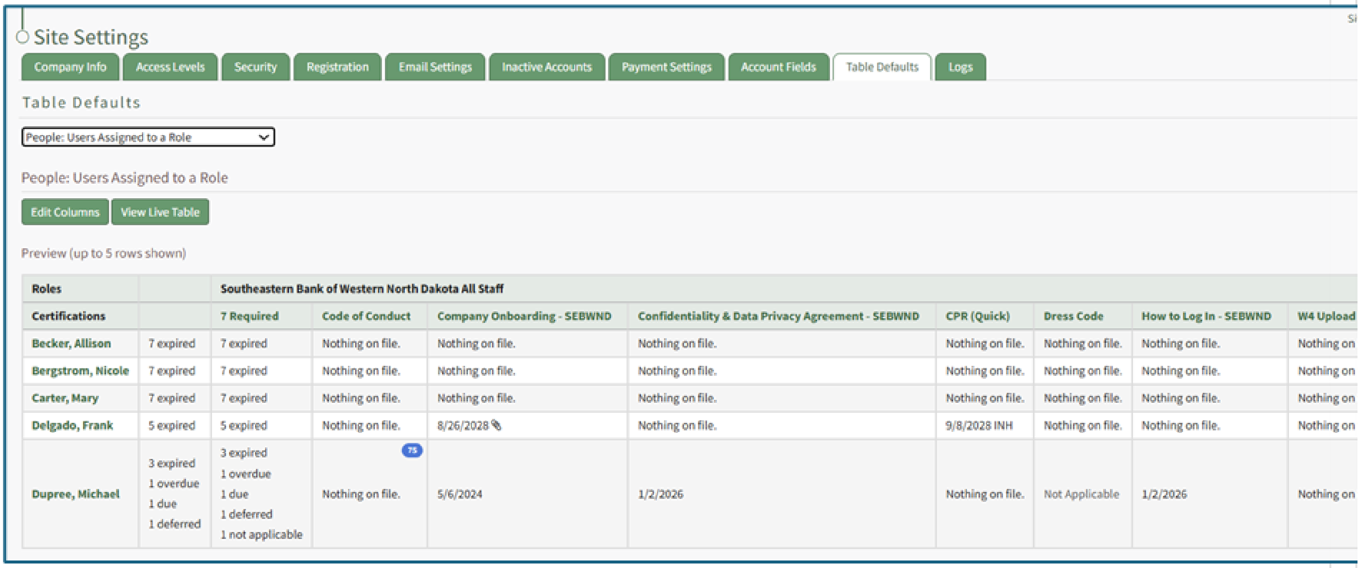
Click “Cancel” to return to the Table Defaults Tab without making any changes.

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.

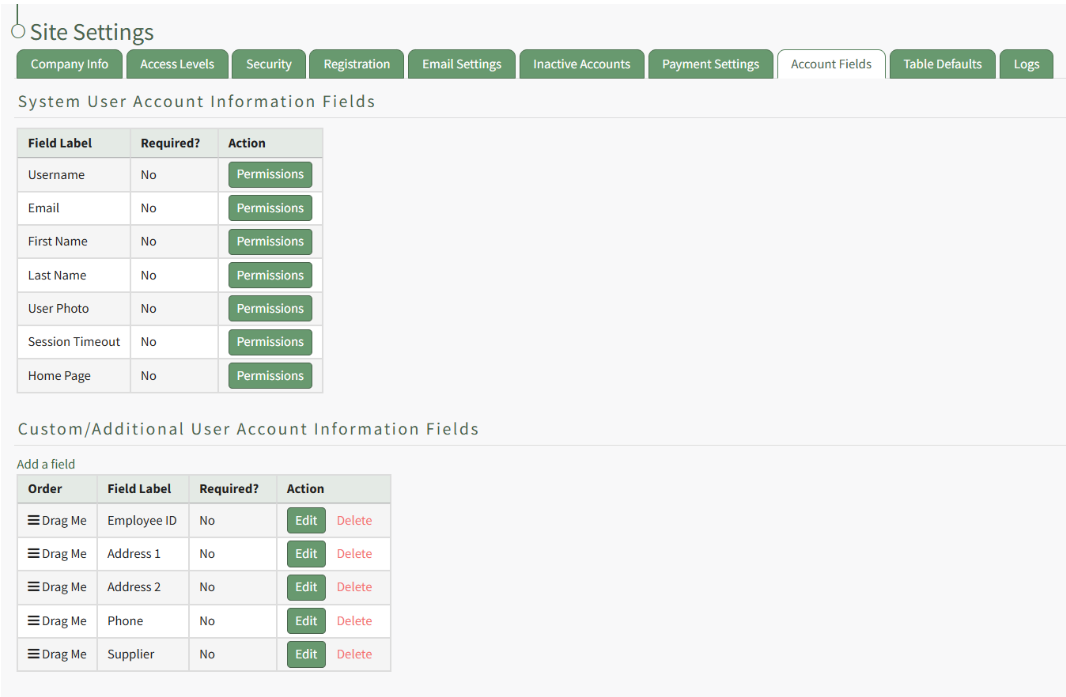


Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include name, username, email, first name, last name, employee ID, phone, Address 1, and Address 2.

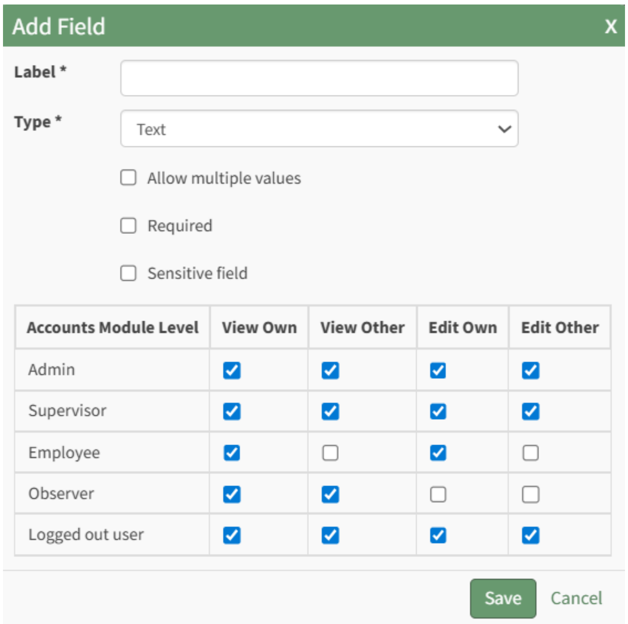
Customizable account information fields can be created on the Account Fields Tab of the Site Settings Module.

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.



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



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.

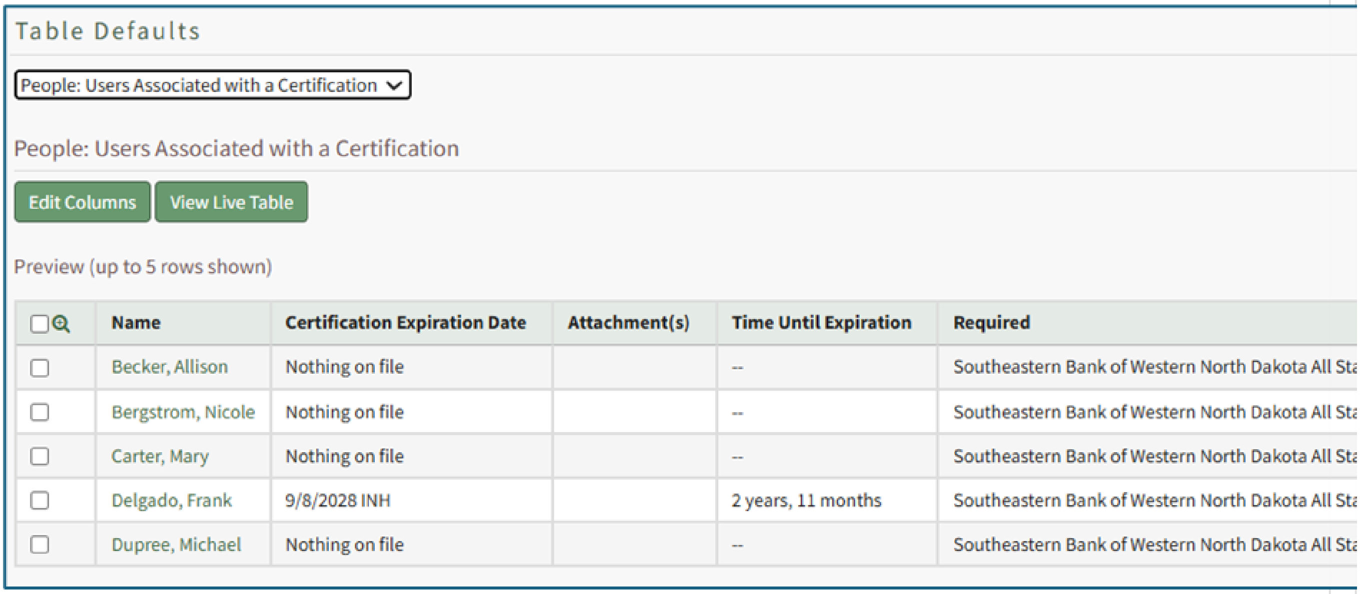
Click “Cancel” to return to the Table Defaults Tab without making any changes.

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.

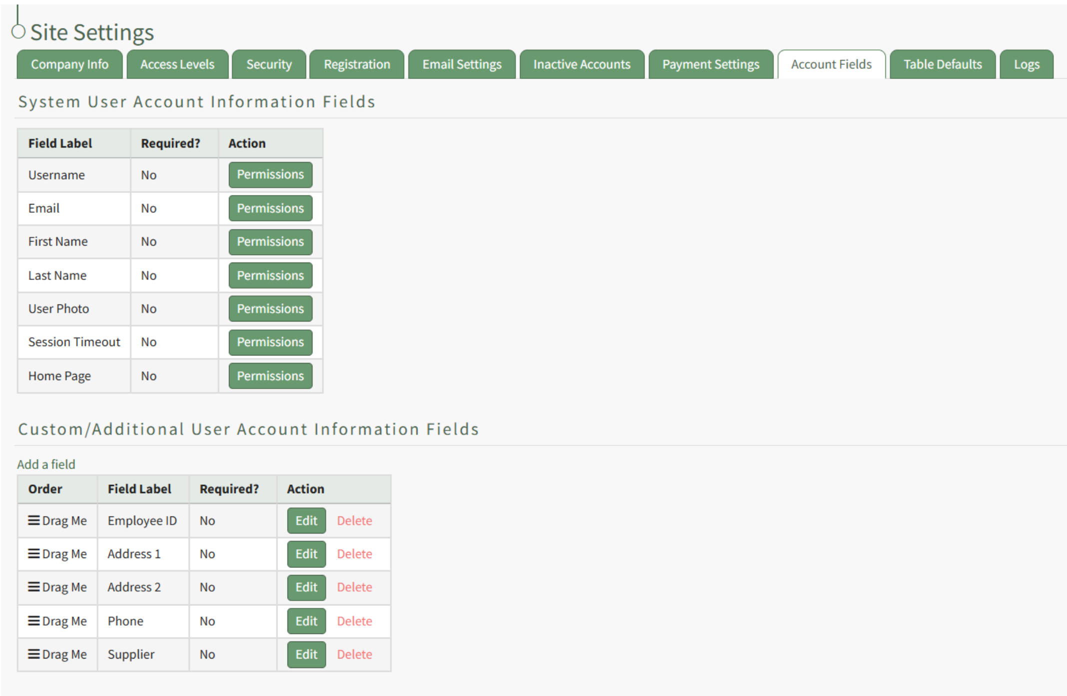


Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: name, username, certification expiration date, attachment(s), time until expiration, required, other required certification, email, first name, last name, employee ID, phone, Address 1, and Address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

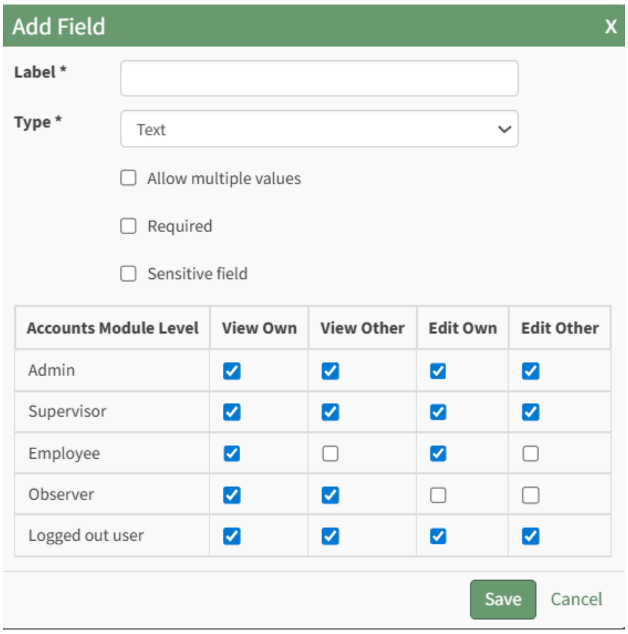
Customizable account information fields can be created on the Account Fields Tab of the Site Settings Module.

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.



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



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.

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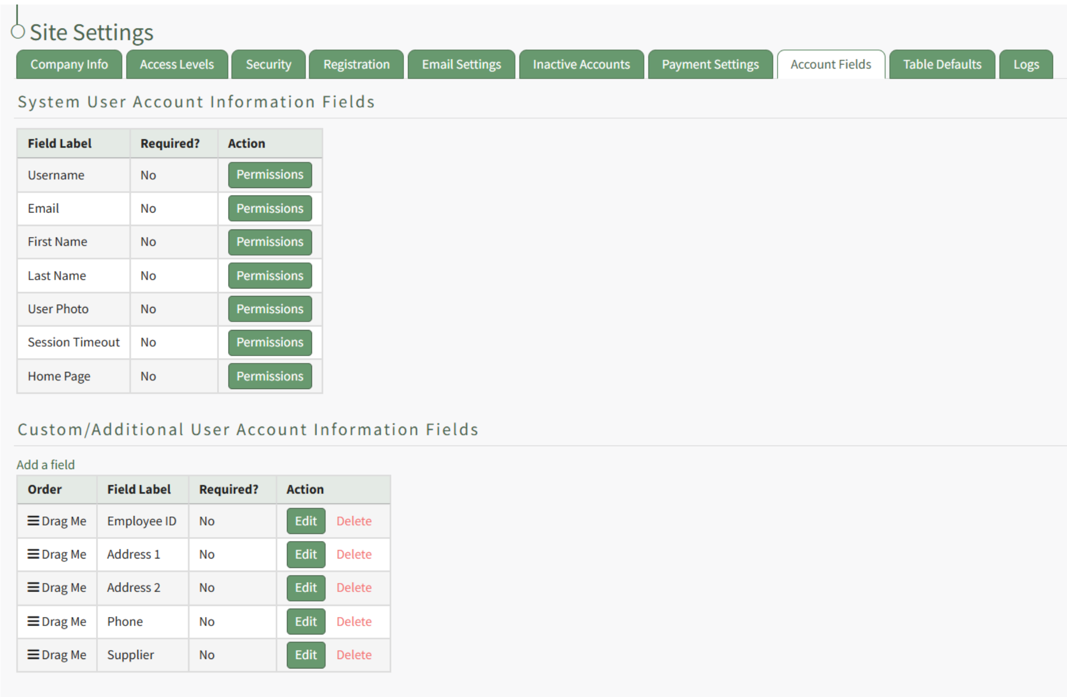
Click “Cancel” to return to the Table Defaults Tab without making any changes.

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.

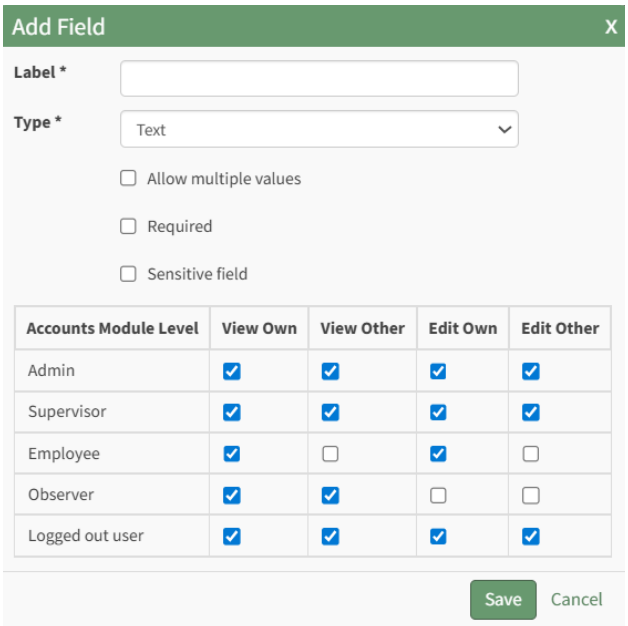
Customizable user account information fields can be created and utilized in the tables as needed.

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.



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



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."

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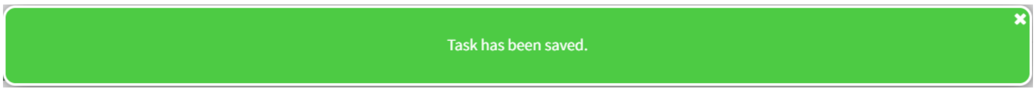
Select the "Save" button and the custom field now shows in the table.

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