iTacit Quick Reference Guide

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www.iTacit.com

(This document was last revised in September 2017)

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Introduction

Welcome to your Site powered by iTacit. This guide is designed to walk you through common Employee Set-Up and Maintenance activities in your top left-hand **Menu**.

For more information regarding regular Dashboard Tools and activities, please refer to the *Welcome iCourse for Employees and Managers*, assigned to you in your "My Training" dashboard tool and available in the Training Catalog.

Infrastructure Requirements

To provide a great customer experience, iTacit has some basic technology requirements and recommendations for people using it. We do our best to provide support for popular computers, laptops, tablets, and smartphones, using popular browsers.

If you have any issues with your device or browser, check our recommendations below, or contact your iTacit representative or the helpdesk@itacit.com team.

Internet Browsers

- Microsoft Internet Explorer (IE) 9 (or newer)
- Mozilla Firefox 4 (or newer)
- Safari 5.1 (or newer)
- Google Chrome 10 (and above)

Plug-Ins

- Adobe Acrobat Reader

Adobe Flash (Supported Media File type)

Adobe Flash support has progressively declined in recent years making it incompatible with most popular and modern browsers. Flash players are currently not supported for iOS and Android devices on all modern browser versions.

It is still possible to consume flash-based media on desktops and laptops primarily using Chrome. If using Internet Explorer, an IE8 compatibility mode is currently enforced in iTacit in order to enable compatibility.

iTacit recommends avoiding the consumption of flash based media going forward due to the diminishing level of support.

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EMPLOYEES

In the Employees menu item, you can quickly add a new employee, modify an existing employee profile, or view the iTacit activities of particular employees.

Before you begin working with employee accounts please ensure that your email address has been added to your own employee profile. This will allow temporary passwords to be sent directly to you if the employee does not have an email address in their profile.

Add an Employee

1. Select **Menu** > **Employees** > **Employee**.

2. In the *Employees* screen, select **New**.

   a. Enter the employee's **Last** and **First Names**.
   b. Enter the **Employee #** if applicable.
   c. Enter an **Email Address** if applicable.
   d. Enter the **Username** for logging into iTacit.
   e. Ensure there is a checkmark by **Assign Temporary Password**.
       (This will ensure a copy of the password is sent to the user via email).

   f. Select the calendar icon by **Employee Since** to set the employee's start date.
   g. Select the calendar icon by **Start Date** to set the employee's role start date.
   h. Select the dropdown arrow by **Default Role** and search for the applicable role.

3. Select **Done** or **More Information** to add additional details to the employee profile.

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Inactivate / Reactivate / Delete an Employee

iTacit recommends *inactivating* employee accounts, rather than *deleting* them. This maintains the electronic record, to consult at a later date if desired. It also allows you to reactivate the employee account if they return to the same or a new position.

Inactivate an Employee:

1. Select **Menu** > **Employees** > **Employee**.

2. Search for and select the employee you would like to inactivate.

    a. Select the **Inactivate** button.
    b. Enter in a specific inactivation date for the employee by selecting the calendar icon or accept the defaulted date
    c. Select **Ok**.

3. Select **Done**.

Once the employee has been inactivated, all roles will be ended and they will not be able to log in to iTacit.

Reactivate an Employee:

1. Select **Menu** > **Employees** > **Employee**.

2. Search for and select the employee you would like to inactivate.

    a. Select the **Reactivate** button.
    b. Select **Yes**.
    c. In the *Roles* section, select **New** to add a role. (This will show the gap in time they were not active and the employee will automatically get the appropriate programs assigned to them.)

3. Select **Done**. *(See image on the next page).*

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Employee Going on Leave:

Option 1 - Leave the employee active, but end the roles - This will ensure that when the employee returns, and a new role is added to his/her profile, he/she can pick up their training where they left off. However - this employee will appear in reports while out on leave.

Option 2 - Deactivate the employee record - This will withdraw the employee from all training. This will ensure that the employees do not appear in reports while out on leave. However - when the employee returns, and a new role is added to his/her profile, he/she will be re-enrolled in ALL required training even though some courses may have been completed earlier in the year.

Delete an Employee:

If you are sure that you would like to fully delete an employee and their records, you must first delete the activities and files associated with them.

1. Select **Menu** > **Employees** > **Employee**.

2. Search for and select the employee you would like to delete.

    a. Select the **Transcript** tab and delete all transcripts.
    b. Select the **Knowledge Programs** tab and delete all knowledge programs.
    c. Select the **Performance** tab and delete all performance items.
    d. Select the **Delete** button then **Yes** in the *Delete* confirmation window.

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> If you receive a **Delete failed** notification; then the employee has been sent a message or survey that is linked to their profile and may not be deleted. In these instances the employee profile should be inactivated.

Export Employee Information

Pull employee information into an Excel workbook instantly.

1. Select **Menu** > **Employees** > **Employee**.

2. Enter your search criteria.

3. Select **Search**.

4. Place a checkmark by the employees you want to export or select the top check mark to select everyone in the list

5. Select **Action** > **Export**.

6. In the *Select Values to Export* screen check the boxes beside which pieces of information you would like to include in the export then select **Download Exported Values**.

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7. An *Export* confirmation window will display. Select **Yes**. Your browser will prompt you to either Open or Save the exported file. The export file type is .CSV and can be opened in Excel.
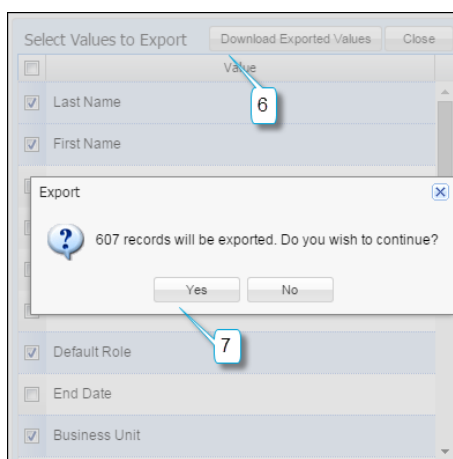
System Access

Using the System Access menu item, under Employees, you can quickly view the status of employee accounts, identify locked accounts, assign new temporary passwords,   or see who has signed in to the system.
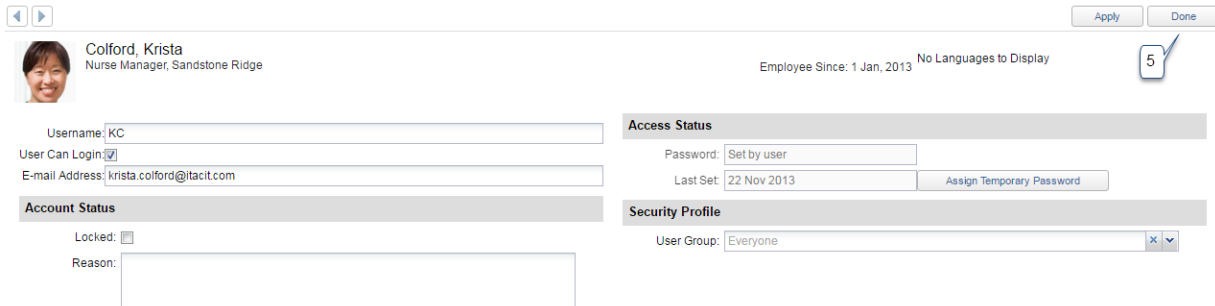
1. Select **Menu** > **Employees** > **System Access**. (Note: You can also view an employee's access information via their employee profile by selecting the Setup Access button.)

2. Enter your search criteria. (Search for specific employees, locked accounts, or by password status, etc.)

3. Select **Search**.
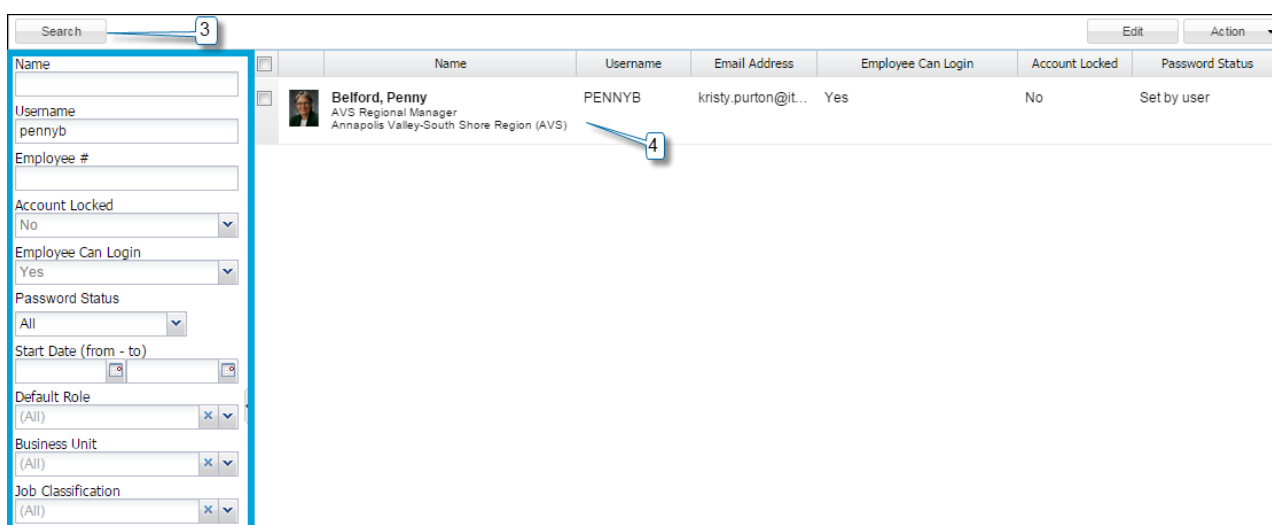
4. To modify an employee's system access (login) information, select the employee from the list to open the *System Access User Options* tab. You can modify the email address, lock or

unlock the account, or assign a temporary password. You also can change the username unless your site is configured to default the username to the employee number. In which case you would need to change the employee number in their profile.

5. Select **Apply** and then **Done**.

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Unlock Account and Assign New Password

After too many invalid login attempts, iTacit will lock an employee's account. Accessing a user's System Access tab through their Employee Profile or through the System Access menu item will allow you to unlock their account and assign a new Temporary Password.

1. Select **Menu** > **Employees** > **System Access**. (Note: You can also view an employee's access information via their employee profile by selecting the Setup Access button.)

2. Search for and select the employee you would like to unlock.

    e. In the *Account Status* section uncheck the **Locked** checkbox.

3. Select **Done**.

4. In the *Access Status* section, select the **Assign Temporary Password** button. A temporary password will be sent to the employee's email address if there is one available, if there is not an email address in the user profile then the system will send the new temporary password to the email address in the profile of the user signed in who has requested the new temporary password. It is important that all iTacit administrators have their email address in their profile.