



iTacit Quick Reference Guide

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www.iTacit.com

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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.

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.

The screenshot shows the 'Add Employee' form in the iTacit system. The form is titled 'New' and 'Done' at the top right. It contains several input fields and a 'More Information' link at the bottom. Callouts are placed over specific fields to indicate where to enter information:

- a**: Points to the *Name field, which is split into Last Name (Debnam), First Name (Alycia), and Middle Name (Middle).
- b**: Points to the Employee # field.
- c**: Points to the Email Address field.
- d**: Points to the *Username field (alycia) and the Assign Temporary Password checkbox.
- e**: Points to the *Employee Since field (1 May 2015) and its calendar icon.
- f**: Points to the *Start Date field (1 Jun 2015) and its calendar icon.
- g**: Points to the *Default Role field (AEC Dietary Manager) and its dropdown arrow.
- h**: Points to the Role Title field (AEC Dietary Manager).
- 3**: Points to the 'More Information' link at the bottom.

Other fields visible include Job Classification (Dietary Manager), Business Unit (Arborstone Enhanced Care (AEC)), and Belongs to Business Unit (Corporate Offices).

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).

The screenshot shows the iTacit employee management interface. The 'Details' tab is selected, displaying information for Phillip Jennings (Employee # 6002179). A 'Reactivate Employee' dialog box is open, asking 'Are you sure you want to reactivate this employee?' with 'Yes' and 'No' buttons. Callouts 'a', 'b', and 'c' point to the 'Reactivate' button, the 'Active' checkbox, and the 'New' button respectively.

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.

The screenshot shows the 'Details' tab of an employee profile for Phillip Jennings. A 'Delete' dialog box is open in the center, asking 'Do you want to delete the selected Employee?' with 'Yes' and 'No' buttons. Callout 'a' points to the Employee # field (6002179), 'b' points to the Employee Since date (1 Feb 2015), 'c' points to the Inactivate button, and 'd' points to the 'Yes' button in the dialog.



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.

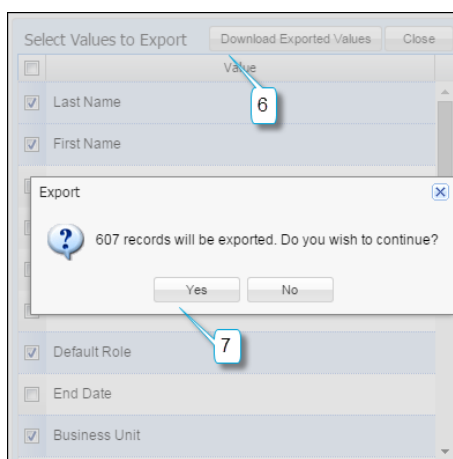
1. Select **Menu > Employees > Employee**.
2. Enter your search criteria.
3. Select **Search**.
4. Place a checkmark by the employees you want to export or select the top check mark to select everyone in the list
5. Select **Action > Export**.

The screenshot shows the 'Search' results for employees. Callout '3' points to the 'Search' button. Callout '4' points to the top checkmark in the table header row. Callout '5' points to the 'Export' option in the 'Action' dropdown menu.

<input checked="" type="checkbox"/>	Name	E-mail Address	Employee #	Default Role	Belongs to Business Unit	Reports To
<input checked="" type="checkbox"/>	Abbott, Abby			Personal Support Worker, Metro Enhanced Care	Central-Enhanced Care	Director of Nursing, Metro Enhanced Care
<input checked="" type="checkbox"/>	Abraham, Lexa			Personal Support Worker, Towers	East Coast-Enhanced Care	Director of Nursing, Towers

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**.

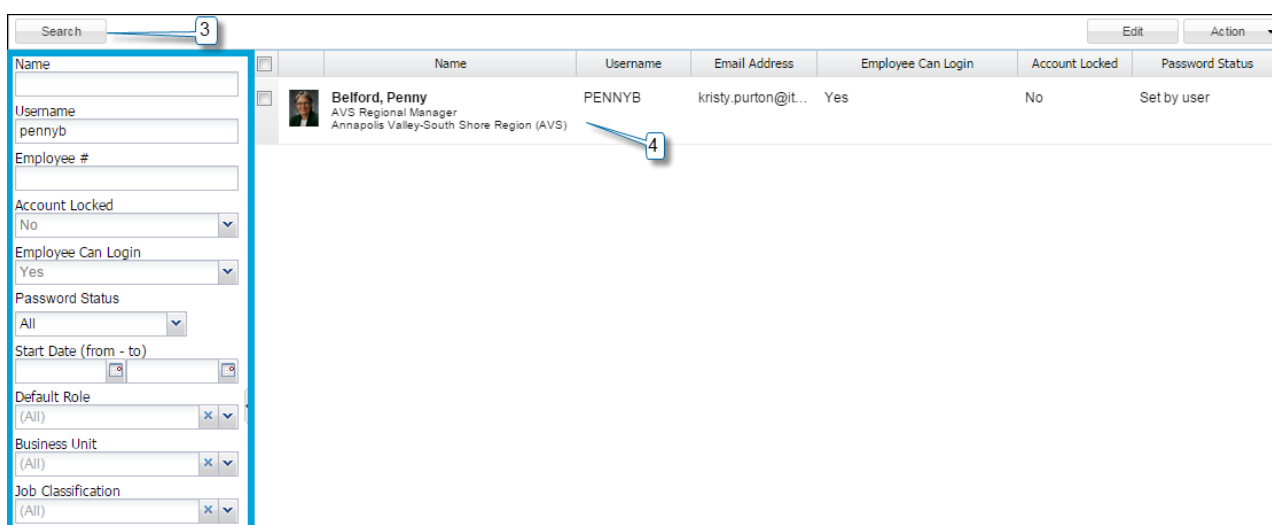
7. An *Export* confirmation window will display. Select **Yes**. Your browser will prompt you to either Open or Save the exported file. The export file type is .CSV and can be opened in Excel.



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.

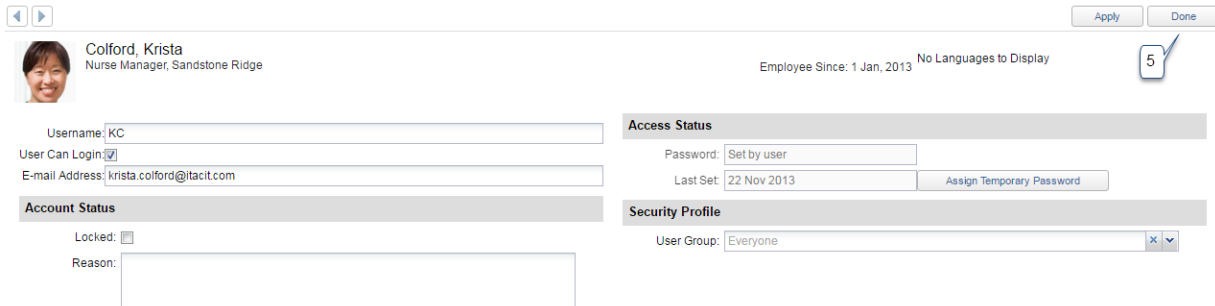
1. Select **Menu > Employees > System Access**. (Note: You can also view an employee's access information via their employee profile by selecting the Setup Access button.)
2. Enter your search criteria. (Search for specific employees, locked accounts, or by password status, etc.)
3. Select **Search**.



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**.



Colford, Krista
Nurse Manager, Sandstone Ridge

Employee Since: 1 Jan, 2013 No Languages to Display

Username: KC

User Can Login: ☒

E-mail Address: krista.colford@itacit.com

Account Status

Locked: ☐

Reason:

Access Status

Password: Set by user

Last Set: 22 Nov 2013 [Assign Temporary Password](#)

Security Profile

User Group: Everyone

Apply 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**.

Colford, Krista
Nurse Manager, Sandstone Ridge

Employee Since: 1 Jan, 2013 No Languages to Display

Username: KC

User Can Login: ☒

E-mail Address: krista.colford@itacit.com

Account Status

Locked: ☒ Reason:

Access Status

Password: Set by user

Last Set: 22 Nov 2013 Assign Temporary Password

Security Profile

User Group: Everyone

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.