

Technical Datasheet

New Tasks Page

The product teams at symplr strive to continually deliver enhancements to our solutions that make it easier for you to perform necessary duties for your organization. Though most of these enhancements focus on updates to existing features and completely new functionality, they also include improvements to the interface – because snazzy new features aren’t any good if you can’t easily navigate and use them.

Interface improvements are usually delivered in small batches – a table updated here, tabs and buttons changed there – so it’s easier for users to adapt to and incorporate into daily routines. However, to truly develop and deliver a modern interface that provides a clean look and updated functionality, sometimes you have to strip an entire page down and rebuild it from the ground up. And that’s what we did with the *Tasks* page in symplr Performance.

My Task List

Type	Task	Employee Name	Due Date	Department/Position Name
Appraisal: In Progress	2016 Performance Evaluation	Cheryl Bieren	10/31/2016	Recruiter I, Human Resources
Performance Goals	2017 Performance Review	Jennifer Morse	11/30/2016	Compensation Analyst I, Human Resources
Performance Goals	2017 Performance Review	Thomas Joseph	11/30/2016	HRIS Analyst I, Human Resources
Development Plan: Review Plan	Professional Development Plan	Angela Ludwig	2/28/2017	Manager - Human Resources, Human Resources

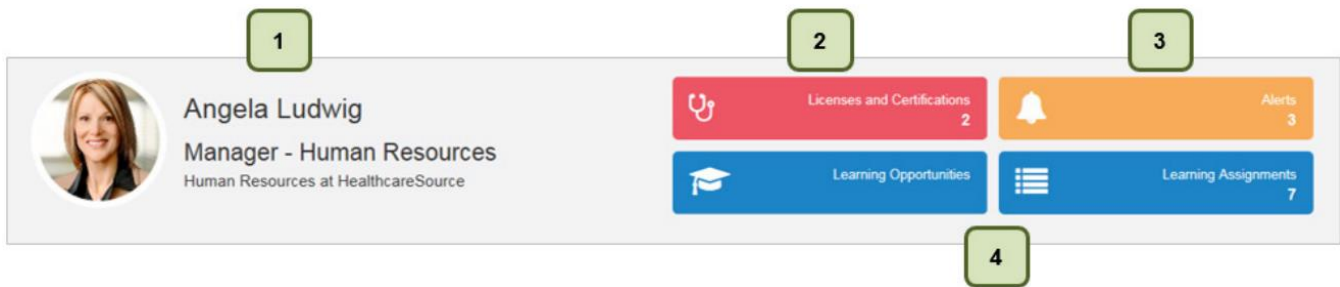
Page size: 25 | Displaying items 1 - 4 of 4

This new and improved *Tasks* page is the latest effort in our ongoing mission to provide cutting-edge technology and features for our users. More information that’s easily viewable, simple filtering options, clean and simple layout devoid of unnecessary clutter, even integration with symplr Learning. We’re beyond excited about our redesign efforts and can’t wait for you to take it for a spin.

Employee Profile Header

The first thing that stands out on the new *Tasks* page is the employee information at the top. This **Employee Profile Header** displays key information at a glance while providing quick links to take action on the listed items. A color-coding system for items delivers additional quick-view indicators so it's easy to see when it's time to review and update profile information.

Let's take a closer look at each item in the new header.



- 1. Employee and Position information.** This area displays the employee name and position. Scroll arrows are available when an employee has multiple positions.
- 2. Licenses and Certifications.** This tile shows how many licenses and certifications reside in the employee's profile. A green background indicates everything is up-to-date; red background means there's items that have a renewal date upcoming or past due. Clicking the tile opens a table view that lists the licenses and certifications under the header.
- 3. Task Alerts.** (*Managers only.*) Displays the number of overdue tasks assigned to employees that report to you. Clicking this item opens a new page that lists the overdue tasks.
- 4. Learning information.** Available to clients with integrated symplr Learning functionality, these areas provide access to symplr Learning widgets for enrolled and available courses and classes. The **Learning Assignments** tile also displays the number of current assignments for the employee.

As mentioned, clicking the **Licenses and Certifications** tile in the header displays a table listing the selected items. This view opens directly under the header, above the Tasks table.

The table can be sorted by clicking any of the column headings.

All done viewing the items in the table? Just click the **X** in the upper-right corner and the table is removed and the Tasks list pops right back up to where it was before.

The screenshot shows the Licenses and Certifications table view for Angela Ludwig. The table is titled "Licenses and Certifications" and has a search bar at the top. The table has the following columns: Type, Name, State, Start Date, and Expiration Date. The table contains two rows of data:

Type	Name	State	Start Date	Expiration Date
Certification	CCP			9/23/2016
Certification	CPR			11/30/2016

At the bottom of the table, there is a page size dropdown set to 10 and a status indicator "Displaying items 1 - 2 of 2".

Tasks Table

Just under that new Employee Profile header is the updated tasks table itself. Sporting a cleaner and more modern interface, this design is easy to read and navigate, yet still provides the same search and sort abilities as before.

My Task List

The main tasks table has a new interface, but operates much like the previous version. The entire table can be sorted by clicking on a column header, and there's controls to scroll through multiple pages of tasks if necessary.

Tasks can now be opened by clicking anywhere in their row (instead of having to click the link in the *Task* column). Tasks with associated sub-tasks display an arrow that, when clicked, expands the row to display the related sub-tasks.

Note: Sub-task view is only available to managers and administrators.

Type	Task	Employee Name	Due Date	Department/Position Name
Review Document	Employee Guide	Ed Hardy	10/31/2016	Clinical Nurse Manager, Med-Surg
Appraisal: In Progress	New Hire	Ellen Tracy	12/31/2016	Certified Nurse Aide, Med-Surg
Status	Type	Assigned To	Due Date	
Complete	Self Appraisal	Ellen Tracy	12/31/2015	
Complete	Multi-Rater Appraisal	Tory Burch	12/31/2015	
Complete	Multi-Rater Appraisal	Kate Spade	12/31/2015	

Navigation: Page size: 25, Displaying items 1 - 2 of 2

Right above the table itself is a new **Search** field that allows you to search for specific tasks in the list. This field is a type-ahead field, so the table automatically begins to filter down with each character entered into the field. This field searches across numerous fields for tasks, making it easier than ever to find exactly what you need.

My Task List

Filters

In addition to the Search field, there are additional filters available to help narrow the results shown in the table. These filters are now found on the left side of the page in their own area, and contain options to filter by **Task Types** and **Due Date**.

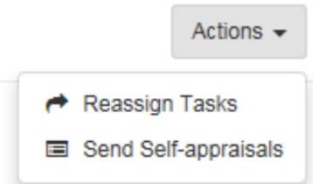
Items in the filter list display a number to the left that indicates how many tasks match that specific criteria, making it easy to see the number of tasks in each category. Clicking the checkbox next to a filter item applies it to the table. Multiple filters can be selected at the same time, so you're able to filter by **Task Type** and **Due Date** if desired.

Task Types

- Appraisal: In Progress **1**
- Development Plan: Review Plan **1**
- Feedback **1**

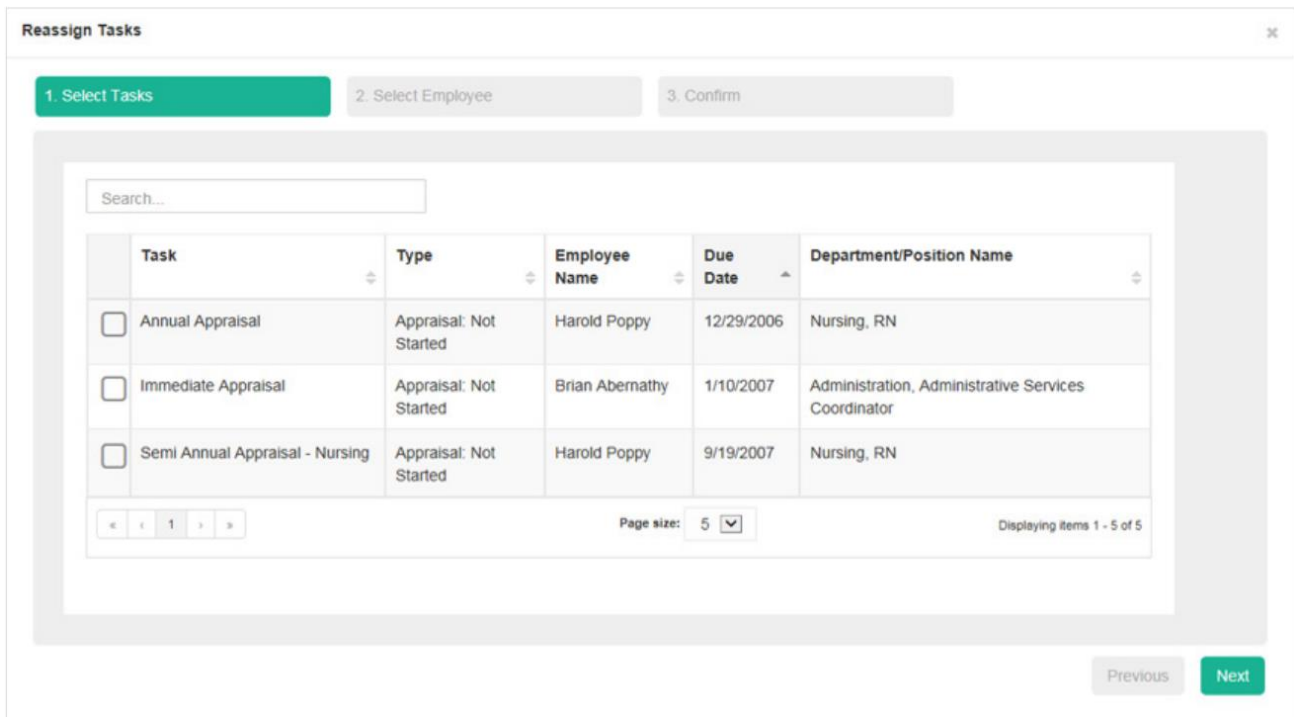
Actions menu

Last but not least is the new **Actions** menu. This drop-down list contains options to **Reassign Tasks** and **Send Self-appraisals** (which used to live above the tasks table as individual buttons). Consolidating these as items in a drop-down saves screen space so more employee and task information can be viewed.



Selecting either option from the **Actions** menu opens a wizard that walks you through the steps necessary for the selected action.

Note: Only managers have access to this **Actions** menu.



The Fine Print

Nothing to worry about, just some things to be aware of as you use the new *Tasks* page.

- Color coding for the License and Certification tile in the Employee Profile Header uses the settings for expiration reminders on the *Settings* page in the **Admin** area.
- Not a symplr Learning client? No problem! The **Learning Opportunities** and **Learning Assignments** tiles are simply removed from your Employee Profile header.
- Don't have any Licenses and/or Certifications? Again, no problem! That tile is removed from the Employee Profile header when there's nothing to show.