Tasks

Tasks 3

1   Tasks

This feature allows you to create a number of tasks associated with an occurrence or enrolment. These tasks can then be associated with the units for an occurrence or enrolment, and/or with occurrence classes. Any number of tasks can be associated with a unit or class, and a task can be linked to more than one unit or class.
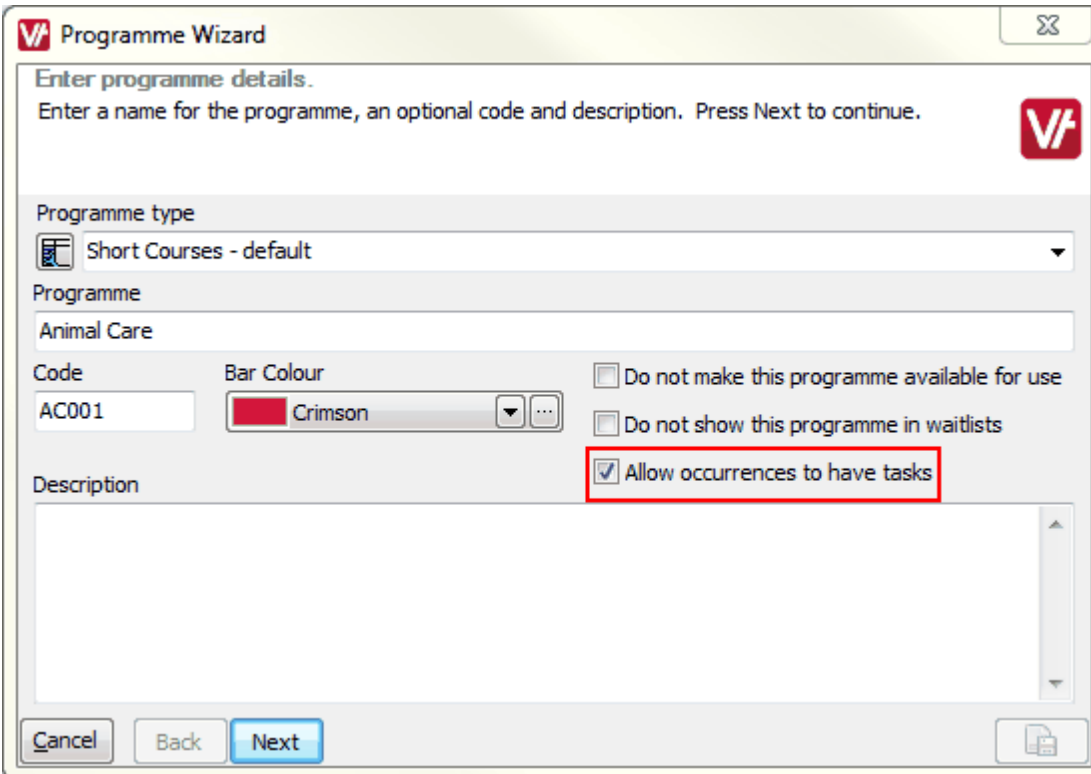
It is then possible to set things up so that a unit can be automatically assigned a result when activity is recorded against task(s) associated with it. This is optional, and you can choose what result, if any, should be automatically recorded.

Note that if a task linked to more than one unit is started or completed, a result will be recorded for all units it is linked to, which may differ depending on whether all other tasks for each unit have also been started/completed or not.

1.1   Task Setup in the Configuration Manager

Programme Wizard

If you wish to use tasks for occurrences, indicate in the Programme Wizard if tasks are to be used in occurrences of that programme.
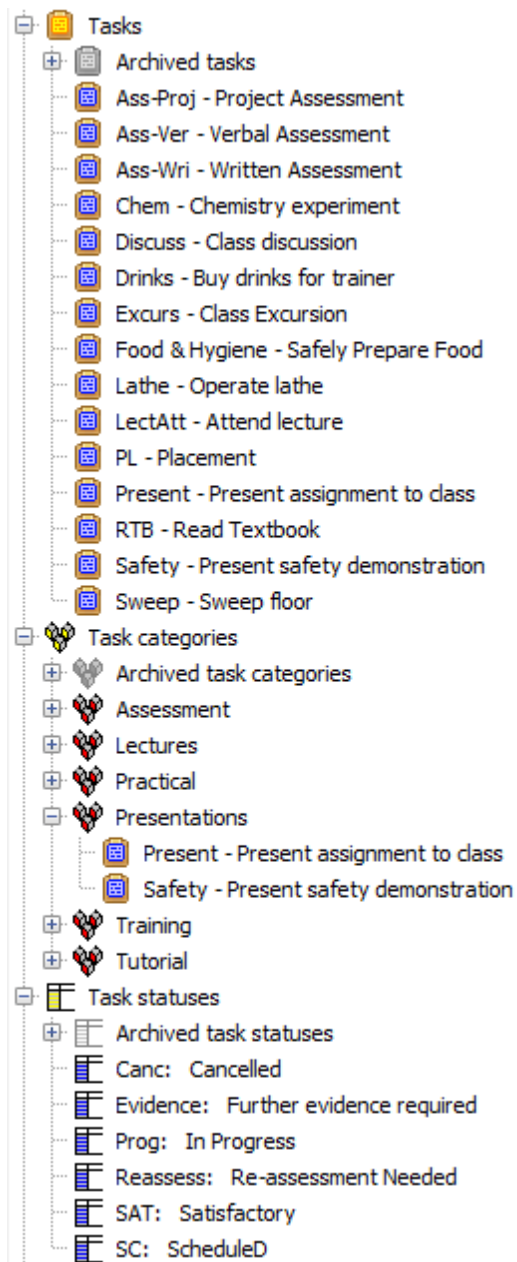
Task Nodes

Three nodes and wizards in the
Configuration Manager relate
specifically to tasks:

- Tasks / Task Wizard

- Task Categories / Task
  Category Wizard

- Task Statuses / Task Status
  Wizard

Tasks
- Archived tasks
- Ass-Proj - Project Assessment
- Ass-Ver - Verbal Assessment
- Ass-Wri - Written Assessment
- Chem - Chemistry experiment
- Discuss - Class discussion
- Drinks - Buy drinks for trainer
- Excurs - Class Excursion
- Food & Hygiene - Safely Prepare Food
- Lathe - Operate lathe
- LectAtt - Attend lecture
- PL - Placement
- Present - Present assignment to class
- RTB - Read Textbook
- Safety - Present safety demonstration
- Sweep - Sweep floor

Task categories
- Archived task categories
- Assessment
- Lectures
- Practical
- Presentations
  - Present - Present assignment to class
  - Safety - Present safety demonstration
- Training
- Tutorial

Task statuses
- Archived task statuses
- Canc: Cancelled
- Evidence: Further evidence required
- Prog: In Progress
- Reassess: Re-assessment Needed
- SAT: Satisfactory
- SC: ScheduleD

V/ Task Wizard ✕

Enter task details.
Enter a name, a code, a category and a description for the task. Press Next to continue.

Name	Code
Chemistry experiment	Chem

Category 　 ☰ Order
🛡 Prac - Practical ▾ 　　☐ Do not make this task available for use

Description

| Cancel | Back | Next | | ▣ |

V/ Task Category Wizard ✕

Enter task category details.
Enter a code, a name and a description for the task category. Press Next to continue.

Name	Code
Practical	Prac

Description

Do stuff in the lab or in the workplace.

| Cancel | Back | Next |

Note that when setting up Task Statuses, you must select a Status Type for each one.

- **Active** - Tasks with a status of this type are in progress, and a completion date cannot be recorded. Recording a task with this type of status can trigger a continuing-type unit result (dependent on settings in Task Preferences⌐7⌐).

- **Completed** - A completion date must be recorded for tasks with a status of this type. Recording a task with this type of status can trigger a completed-type unit result (dependent on settings in Task Preferences⌐7⌐).

- **Cancelled** - This status type would normally be used for tasks that are cancelled and will never be done, such as for cancelled enrolments. Tasks with a status of this type can never trigger a unit result.

1.2   Task Preferences

Before using the Tasks functionality, you need to set up the rules for automatic resulting of units when activity is recorded for tasks associated with them. This is done in the Global Preferences Wizard, accessed under *File > Global preferences*.

There are two scenarios that need to be accounted for - what should happen to a unit when:

- The first task associated with it is started or completed.

- All tasks associated with it are completed.

1. If this box is ticked, a unit will automatically receive the selected result type when activity is recorded for the first task associated with it.
    NOTE: If the unit in question has an existing result, this setting will have no effect - the existing result will NOT be overwritten.

2. Select the result type to be allocated to a unit when activity is recorded for the first of its tasks. Normally this would be a continuing-type result.
    NOTE: If the unit in question has an existing result, this setting will have no effect - the existing result will NOT be overwritten.
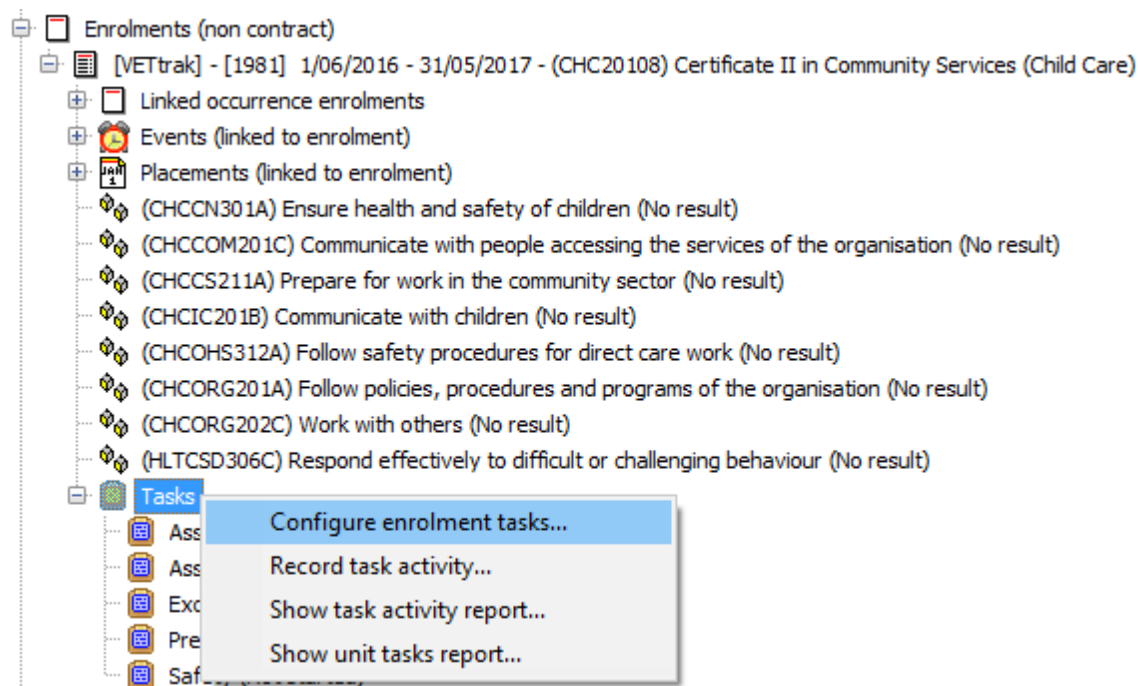
3. The value set here determines what end date is allocated to units that are automatically given a result by the settings above. The end date for the unit will be set to the configured number of months after the latest task start date.
    NOTES:
    - If the end of the enrolment is earlier than the date calculated by this value, the end date of the enrolment will be set instead.
    - However, if the latest task start date is also after the enrolment end date, then the the number of months as set here will be used.

4. If units are to be automatically started when activity is recorded for a task, indicate whether the task activity needs to have a completion date to trigger the start of the unit, or whether any activity on the task is sufficient.

5. If units are to be automatically started or completed when activity is recorded for a task, indicate how the unit start date is to be calculated.
   NOTE: If a unit already has a start date recorded, this will not be overwritten; the existing start date will be used.

6. Click the **Unit completion** tab to set the preferences for setting unit completions via task activity.

7. If this box is ticked, a unit will automatically receive the selected result type when the person completes all tasks associated with it.
   NOTE: If the unit in question has an existing completed-type result, this setting will have no effect - the existing result will NOT be overwritten.

8. Select the result type to be allocated to a unit when all of its tasks are completed. Normally this would be a completion-type result.
   NOTE: If the unit in question has an existing completed-type result, this setting will have no effect - the existing result will NOT be overwritten.

NOTE: There are two exceptions to the rules whereby results are not overwritten. Existing information will be overwritten in the following cases:

- **Western Australia** - where the unit has a "Not Started" (105) result

- **New South Wales** - where the unit has dates but no result

1.3   Tasks for Individual Enrolments

To associate tasks with an individual enrolment, right-click on the *Tasks* node under the enrolment and select *Configure enrolment tasks*.

The Enrolment Task Wizard allows you to select tasks for the enrolment and specify which tasks are linked to which units.

The first page of the wizard allows you to select tasks for the enrolment, and works in a similar way to the unit selection page of the Enrolment Wizard:

1. Search for the tasks by code or name, or

2. Tick the box to search according to the task category.

3. Double-click on the tasks you want to add to the occurrence, or drag and drop them to the right hand panel.

4. When you have selected all the tasks for the occurrence, click **Next** to move on.

The second page of the wizard allows you to specify which tasks are linked to which units:

1. Click on the *Unit View* tab, and

2. Tick the tasks that are to be associated with that unit, or

3. Click on the *Task View* tab, and

4. Select the units to associate the task with.

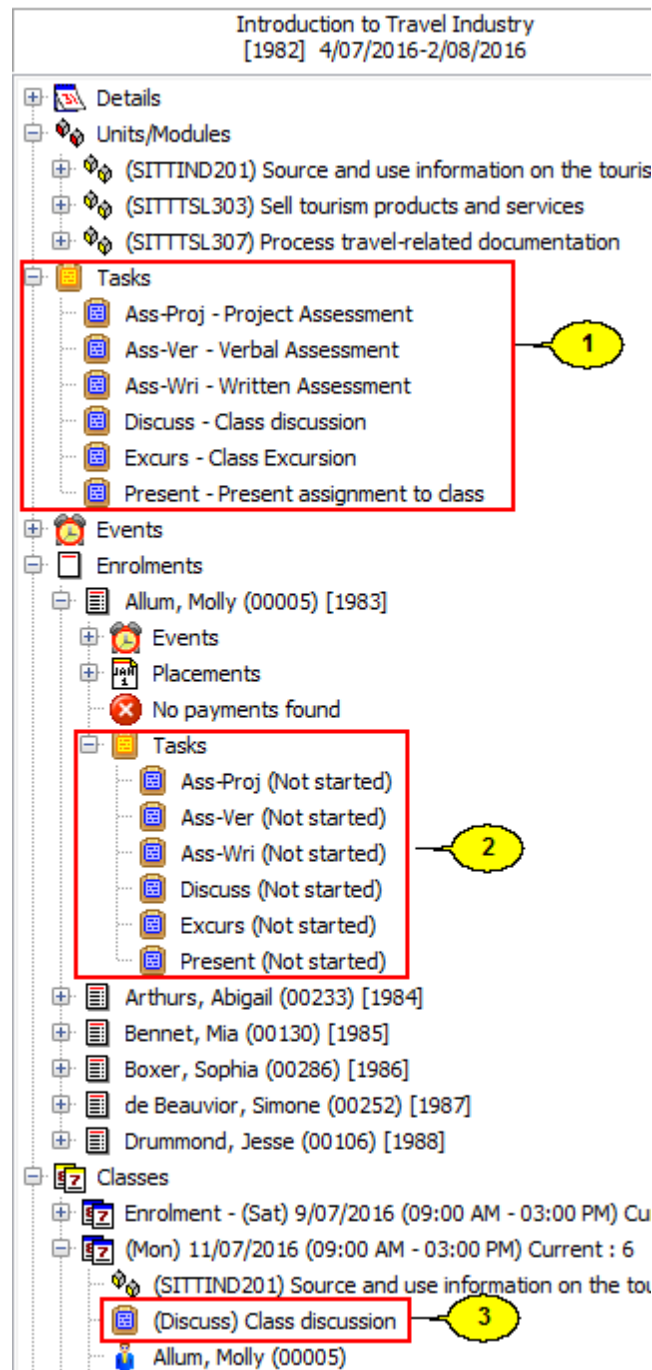The tasks associated with the enrolment can now be seen under the enrolment's *Tasks* node:

```
⊟ ☐ Enrolments (non contract)
   ⊟ 🗐 [VETtrak] - [1981] 1/06/2016 - 31/05/2017 - (CHC20108) Certificate II in Community Services (Child Care)
      ⊞ ☐ Linked occurrence enrolments
      ⊞ ⏰ Events (linked to enrolment)
      ⊞ 📋 Placements (linked to enrolment)
         ⚙ (CHCCN301A) Ensure health and safety of children (No result)
         ⚙ (CHCCOM201C) Communicate with people accessing the services of the organisation (No result)
         ⚙ (CHCCS211A) Prepare for work in the community sector (No result)
         ⚙ (CHCIC201B) Communicate with children (No result)
         ⚙ (CHCOHS312A) Follow safety procedures for direct care work (No result)
         ⚙ (CHCORG201A) Follow policies, procedures and programs of the organisation (No result)
         ⚙ (CHCORG202C) Work with others (No result)
         ⚙ (HLTCSD306C) Respond effectively to difficult or challenging behaviour (No result)
      ⊟ 📋 Tasks
         📋 Ass-Ver (Not started)
         📋 Ass-Wri (Not started)
         📋 Excurs (Not started)
         📋 Present (Not started)
         📋 Safety (Not started)
```

NOTE:

If you wish to remove a task from an enrolment, this can only be done if there is no activity recorded against that task. If activity has been recorded, you will need to remove that activity before deleting the task (by clearing all fields in the Enrolment Task Activity Wizard 26).

1.4 Tasks in the Programme Manager

1.4.1 Tasks Nodes
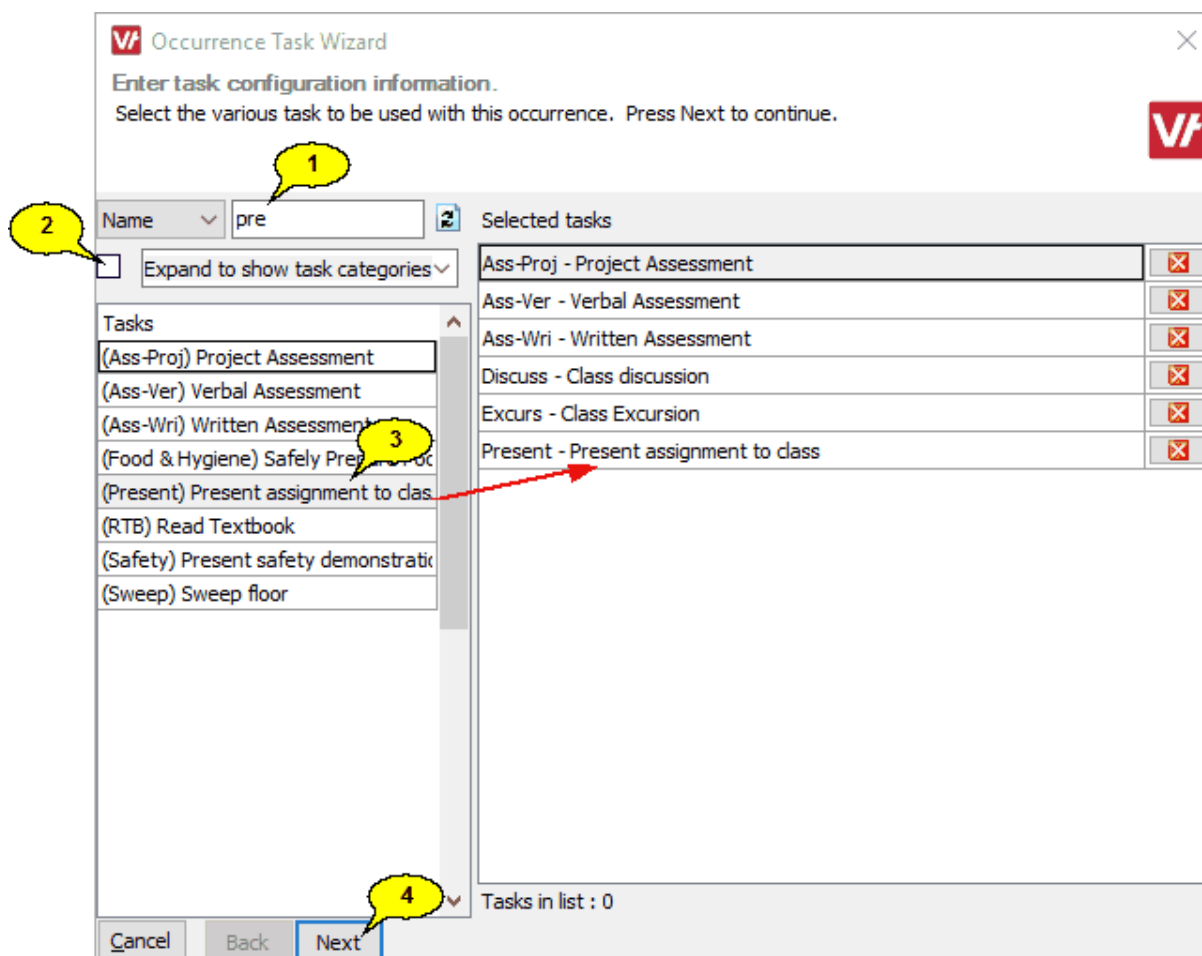
Tasks appear in a number of places under an occurrence:

1. A Tasks node for the occurrence shows all tasks associated with that occurrence.

2. Another *Tasks* node under each individual enrolment shows only the tasks associated with that person's enrolment. This may differ from the list of tasks for the occurrence.

3. Tasks can also be associated with individual classes.

1.4.2   Adding Tasks to an Occurrence

The Occurrence Task Wizard allows you to select tasks for the occurrence and specify which tasks are linked to which units. To open this wizard, right-click on the *Tasks* node for the occurrence and select *Configure occurrence tasks*.
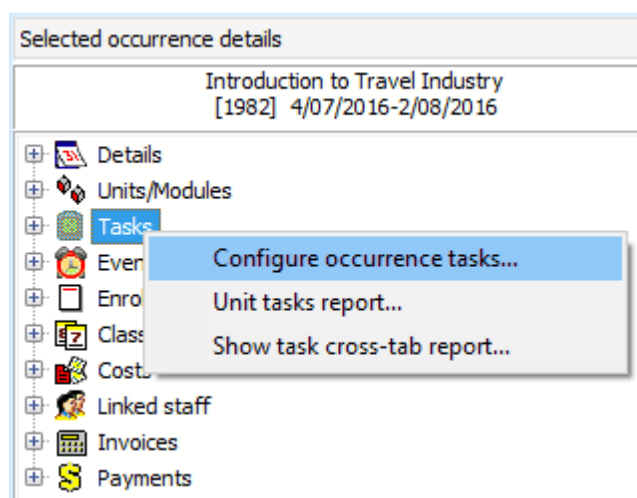
The first page of the wizard allows you to select tasks for the occurrence, and works in a similar way to the unit selection page of the Occurrence or Enrolment Wizard:

1.   Search for the tasks by code or name, or

2.   Tick the box to search according to the task category.

3.   Double-click on the tasks you want to add to the occurrence, or drag and drop them to the right hand panel.

4.   When you have selected all the tasks for the occurrence, click **Next** to move on.

The second page of the wizard allows you to specify which tasks are linked to which units:

1. Click on the *Unit View* tab, and

2. Tick the tasks that are to be associated with that unit, or

3. Click on the *Task View* tab, and

4. Select the units to associate the task with.

NOTE: It is not necessary for all tasks to be linked to units, or vice versa. An occurrence can have units without tasks, and/or tasks that are not linked to units.

1.4.3 Adding Units

If you add a unit to an occurrence after you have set up the task mappings, you may want to review your task mappings and associate some tasks with the new unit. If so, tick the box at the end of the Add Programme Occurrence Units/Modules Wizard.

This will open the Occurrence Task Wizard. You can then proceed as described under <u>Adding Tasks to an Occurrence</u> 15.

1.4.4   Associating Tasks with Classes

It is possible to associate occurrence tasks with particular classes in the occurrence. Multiple tasks can be associated with a class, and a task can be associated with multiple classes. There are a number of ways of associating tasks with classes:

- Simply drag and drop the task onto the appropriate class.

- Right-click on a class and select ***Add tasks to class***.

- When adding a class to an occurrence using the ***Add class to occurrence*** option against the ***Classes*** node, the third page of the Class Wizard allows you to select the tasks that you wish to associate with that class.

1.4.5 Changing Tasks for Occurrence Enrolments

When a person is enrolled into an occurrence, their enrolment automatically receives the tasks and their mappings to units from the occurrence. It is possible to change the tasks for individual enrolments by right-clicking on their individual **Tasks** node and selecting **Configure enrolment tasks**.
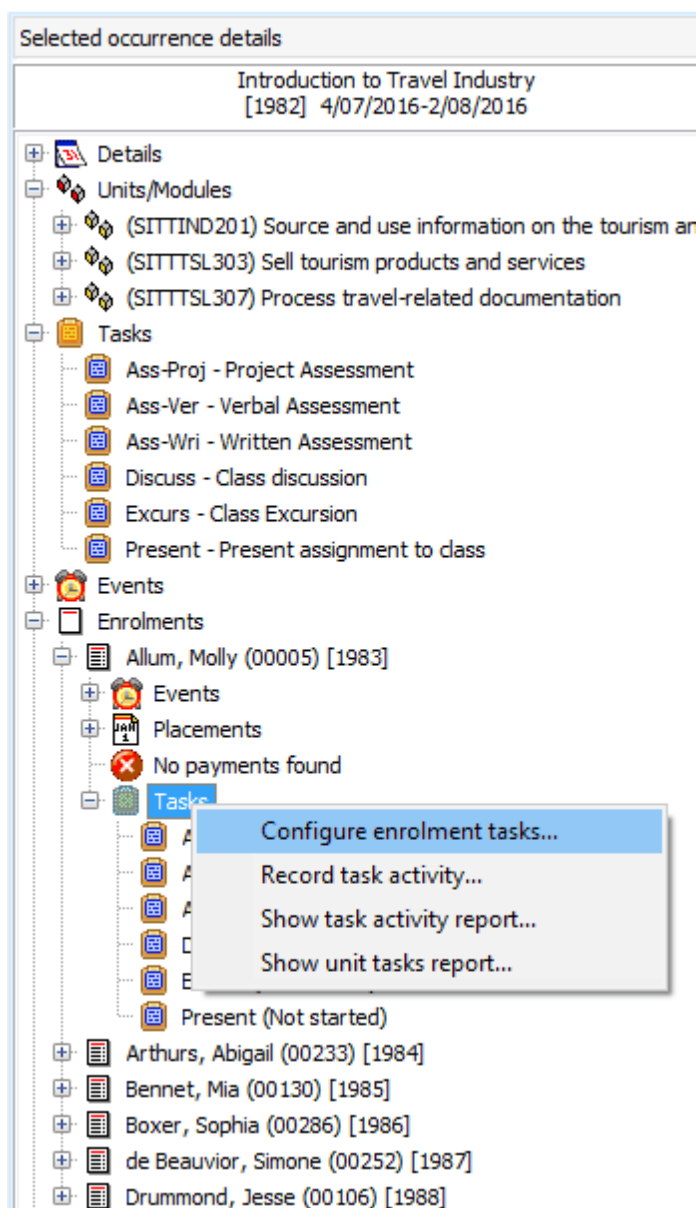
You then need to untick the "Copy task matrix from occurrence" box in order to be able to change the task allocations for this enrolment. Then continue in the same manner as when assigning tasks to an occurrence 15 .

Vr Enrolment Task Wizard : Allum, Molly (00005) [1983]   ✕

Enter task configuration information.
Select the various task to be used with this occurrence. Press Next to continue.

Vr

☐ Copy task matrix from occurrence (while enrolment is active)

Code ▾		🔁	Selected tasks

☐ Expand to show task categories ▾

Tasks

Ass-Proj - Project Assessment	❌
Ass-Ver - Verbal Assessment	❌
Ass-Wri - Written Assessment	❌
Discuss - Class discussion	❌
Excurs - Class Excursion	❌
Present - Present assignment to class	❌

<No data to display>

Tasks in list : 0

Cancel	Back	Next

1.4.6 Changing Occurrence Tasks After Clients Are Enrolled

If you change the tasks for an occurrence after clients have been enrolled in the occurrence, by default the changes to tasks will also be applied to any existing enrolments in the occurrence. The exceptions to this are:

- Any enrolment with a Cancelled-type status.

- Any enrolments that have had the "Copy task matrix from occurrence" box unticked in the Enrolment Task Wizard 22. If you want to protect any enrolments from having their task assignments change, untick this box by going to the **Tasks** node for the enrolment and selecting **Configure enrolment tasks**.

NOTE:

If you wish to remove a task from an enrolment, this can only be done if there is no activity recorded against that task for any of the enrolments in the occurrence. If activity has been recorded, you will need to remove that activity before deleting the task (by clearing all fields in the Enrolment Task Activity Wizard 26).

1.4.7   Deleting Units

If a unit is deleted from an occurrence or occurrence enrolment, any tasks associated with the unit will NOT be removed, but will remain as 'orphaned' tasks. It is not considered appropriate to remove the tasks, as they may have already been completed, in which case removing the tasks would delete historical information about work undertaken by the enrolled client(s).

1.5 Recording Task Activity

You can record activity associated with a task either:

- On a per enrolment basis 26 (recording activity on several tasks for a single person at once).

- On a per task basis 28 (occurrence tasks only - recording the same activity for several students at once)

While the eventual aim is to record when each task is completed, you can also choose to record as much or as little information as you like along the way. Examples of things you may want to do include:

- Simply recording when a task is completed 30.

- Recording when a task is started, and then later, when it is completed.

- Keeping track of a task through a number of different stages 33

- Recording only a comment for a task

- Recording only a staff member to be associated with the task

As you can record changes in the task's activity and status as often as you like, there is no limit to the number of scenarios you may want to cater for.

1.5.1 Recording Task Activity for Individual Enrolment

To record task activity for one or more tasks for an enrolment, right-click on the **Tasks** node for the enrolment in the Client Manager or Programme Manager, and select **Record task activity**.

1. Select the status you want to record.

2. Select that date this status takes effect. This defaults to today's date, but can be changed if appropriate.

3. Select the date that activity on this task started or is scheduled to start.

4. You can only select the Completion Date if a Complete-type status has been selected. In that case, selecting a Completion Date is mandatory.

5. Optionally, you can indicate the date that a task is due to be completed.

6. You can also optionally record a staff member, percentage mark, and comments for each task.

7. Click this button to view the history of statuses recorded for this task.

NOTES:

- Recording a Due Date, Staff Member or Comments does not constitute task activity for resulting purposes. It is possible to enter any of these fields without recording a task status or other dates.

- If any of the Task Status, Date of Status Change or Start Date are entered, then all of those fields must be entered.

1.5.2 Recording Task Activity for Multiple Occurrence Enrolments

To record task activity for a single task in multiple occurrence enrolments at once, right-click on the task under the occurrence's *Tasks* node, and select *Record task activity*.

1. Select the status you want to record.

2. Select the date this status takes effect. This defaults to today, but can be changed if appropriate.

3. You can optionally enter a date that the task is due to be completed.

4. Indicate the date the task was started or is scheduled to start.

5. The Completion Date can only be entered if a completed-type Task Status has been selected, in which case it would be mandatory.

6. Optionally, enter a percentage mark and staff member.

7. All clients who are enrolled in the task are listed here. Tick the ones you want to record this task status for, all click the Use heading to select them all.

8. If any status has previously been recorded for this task, details of the last recorded status will be shown here.

NOTES:

- Recording a Due Date, Staff Member or Comments does not constitute task activity for resulting purposes. It is possible to enter any of these fields without recording a task status or other dates.

- If any of the Task Status, Date of Status Change or Start Date are entered, then all of those fields must be entered.

1.5.3 Example: Recording Task Completion

There are two ways to record task completion:

- **Per task** - select a task and record completion for multiple clients at once.
- **Per enrolment** - select an individual enrolment and record completion for multiple tasks at once.

Recording Task Completion per Task for Multiple Students

Right-click on a task in the Programme Manager, and select **Record task activity**.

1. Select a completion-type status for the task. A completion-type status is any status that has "Completed" selected as the Status Type in the Task Status Wizard 3 .

2. Set the date that this status takes effect.

3. Set the start date of task.

4. Set the completion date of the task. This field is only enabled if a completed-type status has been selected, in which case it is mandatory.

5. (Optional) Set the percentage mark granted for the task.

6. (Optional) Select the staff member associated with the task

7. Tick the clients who have completed the task, or tick the *Use* heading to tick them all at once.

8. Click *Next* and *Finish* to save.

If this task is the first or last task to be completed for any unit in a client's enrolment, then that unit will have a result assigned in line with the settings in the Task Preferences 7 .

Recording Task Completion per Enrolment

Expand the enrolment, right-click on the *Tasks* node under the enrolment, and select *Record task activity*.

1. Select a completion-type status for the task. A completion-type status is any status that has "Completed" selected as the Status Type in the Task Status Wizard 3.

2. Set the date that this status takes effect.

3. Set the date the task was started.

4. Set the date the task was completed. This field is only enabled if a completed-type status has been selected, in which case it is mandatory.

5. (Optional) Select the staff member associated with the task

6. (Optional) Set the percentage mark granted for the task.

7. (Optional) Enter any notes or comments regarding this task.

8. It is also possible to track the status of a task through several stages, rather than just marking it as complete. This button allows you to see a history of the task's progress. See the Tracking Task Status 33 section for more information.

If any task is the first or last task to be completed for any unit in this enrolment, then that unit will have a result assigned according to the settings in the Task Preferences 7.

NOTES:

- When completing tasks in this manner, there can be several 'first completed' tasks recorded at once.

- If a unit has no existing completed task or result, and more than one of its associated tasks is completed on a single run through this wizard, the earliest recorded task completion date will be set as the unit start date.

1.5.4   Example: Tracking Task Status

It is possible to track a task through several stages and see a history of the student's progress through the task, as well as seeing what stage the task is currently at. This can be particularly useful for tracking the various stages that an assignment might go through, such as:

- Submitted by student

- Sent to teacher for marking

- Returned to student for reworking

- Resubmitted by student

- Mark awarded.

To track assignments this way, you would first set up Task Statuses corresponding to each stage that the assignment might go through:
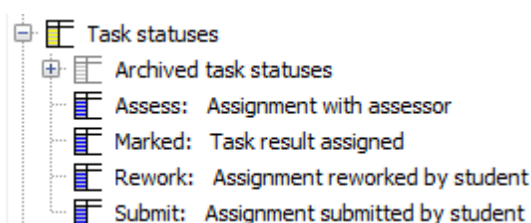
Only the final status in the process would be set as a Completed-type status in the Task Status Wizard 3, all the rest would have Active selected as their status type:

It is then possible to record a succession of different task statuses and see a record of the task's progress. For example, an assignment might go through a process like this:

- Submitted by student

- Passed on to trainer for marking

- Returned to student for reworking because it was unsatisfactory

- Resubmitted by student

- Passed on to trainer again

- Mark awarded

We start by recording the first task status:

The assignment was submitted by the student on 01/06/2016 and given to Angelina Gabb, who works at the student admin desk.

Once the first status has been recorded for the task, it will appear as "Started" in the list, followed by the specified start date.

Angelina straight away passes the assignment on to the assessor for marking, so we open the wizard again and record this as our next status:

The assignment has been passed on to the assessor, Mitchell Bathurst, on 01/06/2016.

If the assignment needs to go back to the student for more work, we can record this as the next status:

Task Code	Task Name	Task Status	Date of status change	Start Date	Completion Date	Due	Staff	%	Comments	Show history
Ass-Ver	Verbal Assessment									...
Ass-Wri	Written Assessment	Assignment reworked t	6/06/2016	1/06/2016			Bathurst, Mitchel		Needs more detail	...
Excurs	Class Excursion									...
Present	Present assignment to class									...
Safety	Present safety demonstration									...

Mitchell has returned the assignment to the student on 06/06/2016. Note that we do not change the start date - the date the assignment is returned to the student is recorded under Date of Status Change.

At any point, we can see where the assignment is by right-clicking on the individual task and clicking *View enrolment task history*.

We can now see where the assignment is by looking at the most recent status. In this case, the last status is "Assignment reworked by student", so we know the assignment is currently with the student.

Enrolment Task History Wizard: Written Assessment: Aardvark, Alan John (00412) [1981]

View task activity history.
View activity history items for the enrolled task. Click on column headings to sort.

Enrolment task activity history: Written Assessment (Ass-Wri)

Enrolment: Aardvark, Alan John (00412) [1981] : 1/06/2016 - 31/05/2017

Task Code	Task Status	Date of status change	Start Date	Completion Date	Completion date recorded by	Due	Staff	%	Comments	Recorded on	Recorded by
Ass-Wri	Assignment submitted by st	1/06/2016	1/06/2016				Gabb, Angelir			23/06/2016 9:0	VETtrak, Trak
Ass-Wri	Assignment with assessor	1/06/2016	1/06/2016				Bathurst, Mitc			23/06/2016 9:2	VETtrak, Trak
Ass-Wri	Assignment reworked by st	6/06/2016	1/06/2016				Bathurst, Mitc		Needs more detail	23/06/2016 10:	VETtrak, Trak

Close

We then record when the assignment comes back to the assessor...

Enrolment Task Activity Wizard: Aardvark, Alan John (00412) [1981]
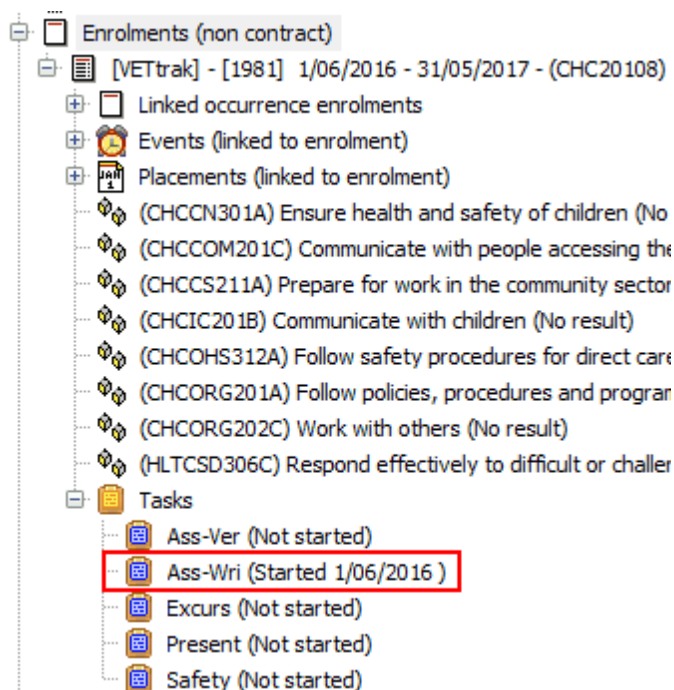
Assign task activity for client enrolment.
Set the activity details for each task as required. Completion date is only available when a completed task status is selected. Press Next to continue.

Task Code	Task Name	Task Status	Date of status change	Start Date	Completion Date	Due	Staff	%	Comments	Show history
Ass-Ver	Verbal Assessment									...
Ass-Wri	Written Assessment	Assignment with assessor	9/06/2016	1/06/2016			Bathurst, Mitch			...
Excurs	Class Excursion									...
Present	Present assignment to class									...
Safety	Present safety demonstration									...

Cancel   Back   Next

The assignment is submitted to the assessor again on 09/06/2016.

...and when a result is finally assigned. At this point we also record the completion date, and optionally, the mark assigned.

Enrolment Task Activity Wizard: Aardvark, Alan John (00412) [1981]

Assign task activity for client enrolment.
Set the activity details for each task as required. Completion date is only available when a completed task status is selected. Press Next to continue.

Task Code	Task Name	Task Status	Date of status change	Start Date	Completion Date	Due	Staff	%	Comments	Show history
Ass-Ver	Verbal Assessment									...
Ass-Wri	Written Assessment	Task result assigned	13/06/2016	1/06/2016	13/06/2016		Bathurst, Mitche	75		...
Excurs	Class Excursion									...
Present	Present assignment to class									...
Safety	Present safety demonstration									...

Cancel   Back   Next

A result is finally given for the assignment on 13/06/2016. As no more needs to be done to this assignment once a result is given, we record this date as the completion date as well as the date of status change.

Once a completed-type status has been recorded, the task will appear as Done in the client's task listing:

If we look again at the task history, we can clearly see all the stages the task has gone through:

1.5.5   Rules for Unit Results due to Task Activity

When suitable task activity* is recorded, units are automatically resulted as follows:

When activity is recorded against the first task associated with a unit

The following will occur as long as the ***Automatically start unit*** box is ticked in the Task Preferences 7ᐟ, and the unit does not already have a result:

*   The unit is automatically given the result specified under ***Result type when auto starting a unit*** in the Task Preferences 7ᐟ.

*   The start date is set according to the criteria specified in the Task Preferences.

*   The finish date is set to the number of months after the task start date that is set under ***Months in future to set unit end date when automatically started***, in the Task Preferences.

    o   If activity is recorded for more than one task for the unit, the latest activity date (whether start or completion) is used for the calculation of the unit finish date.

    o   If the end of the enrolment is earlier than the date set here, the end date of the enrolment will be set instead.

    o   However, if the latest task start date is also after the enrolment end date, then the the number of months set in the Task Preferences will be used.
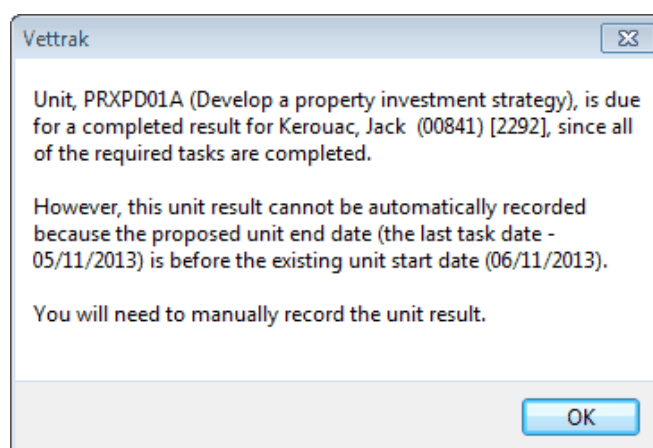

When all of the tasks associated with a unit are completed

The following will occur as long as the ***Automatically complete unit*** box is ticked in the Task Preferences 7ᐟ, and the unit does not already have a completed-type result.

*   The unit is automatically given the result specified under ***Result type when completing a unit*** in the Task Preferences 7ᐟ.

*   The start date is set to the start date specified for the first task.

*   The finish date is set to the date the last task was completed.

Notes Regarding Unit Dates

*   The calculated unit start date will use the same preferences (from the Task Preferences) when recording either a unit started or a unit completed result.

*   Unit start dates are never overwritten when auto-resulting a unit. If there is an existing start date recorded for a unit, that date is used when auto-resulting the unit.

*   When auto-completing a unit, if the calculated unit end date is before an existing unit start date, the unit resulting is aborted and the message below is displayed. The user will need to manually record the unit result.

Vettrak

Unit, PRXPD01A (Develop a property investment strategy), is due for a completed result for Kerouac, Jack (00841) [2292], since all of the required tasks are completed.

However, this unit result cannot be automatically recorded because the proposed unit end date (the last task date - 05/11/2013) is before the existing unit start date (06/11/2013).

You will need to manually record the unit result.

OK

NOTES:

- 'Suitable task activity' means that the activity:
  - Satisfies the settings under <u>Task Preferences</u> 7 , and
  - Is not of a <u>"Cancelled" type</u> 3 .

- There are two exceptions to the rules whereby results are not overwritten. Existing information will be overwritten in the following cases:
  - Western Australia - where the unit has a "Not Started" (105) result
  - New South Wales - where the unit has dates but no result

1.5.6 Linked Enrolments

Where a client is indirectly enrolled in an occurrence's units via a linked parent enrolment, any results automatically generated by task completion will be passed on to the unit in the parent enrolment.