

How to: View & Manage existing induction assignments

This is a how-to guide on viewing and managing induction assignments for a user in the AUT Events Induction Portal.

Available fields to manage include: Available from date, Due date, Completion date, Status, or to delete the induction assignment

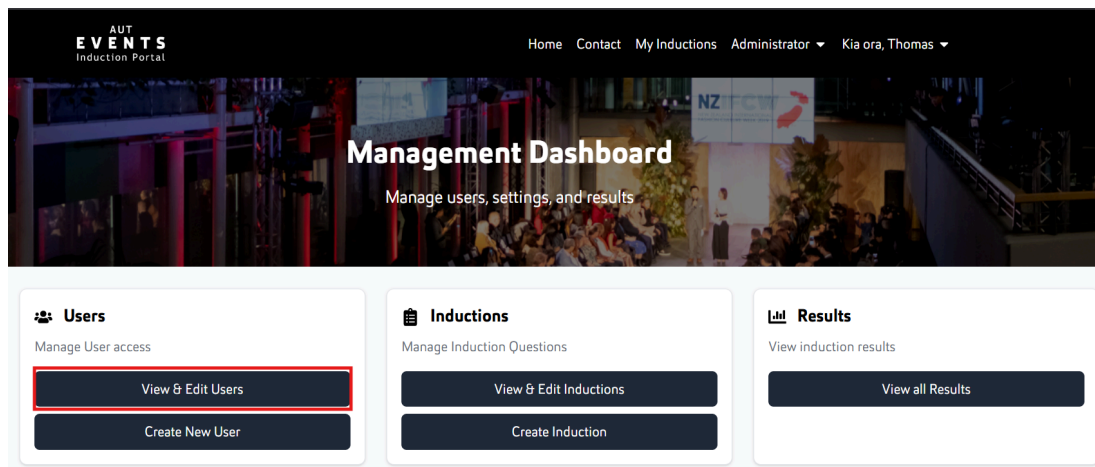
Manager or Administrator access required

Last updated by Thomas Brears on 23/04/25. V1.0

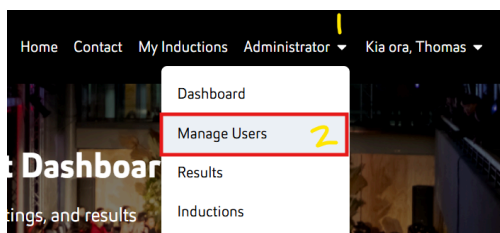
1. Select a user

1.2. Navigate to the View Users page

Use the "View & Edit Users" button from the management dashboard on the Users card, or use the navigation page dropdown and "Manage users"



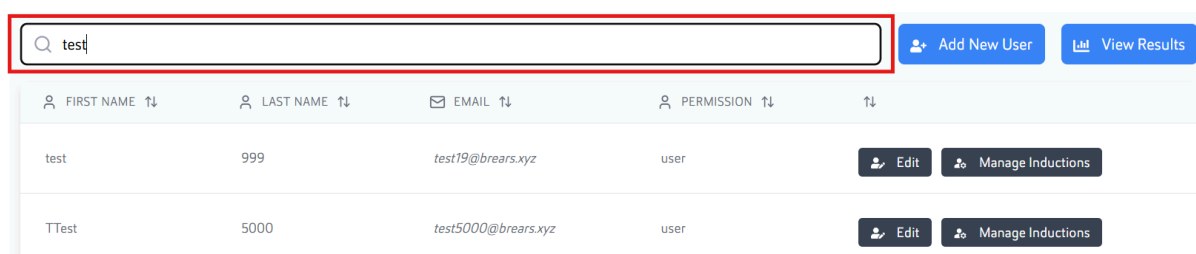
OR



NOTE: For administrators, this dropdown text in the navigation is called Administrator, and for Managers, it is called Manager

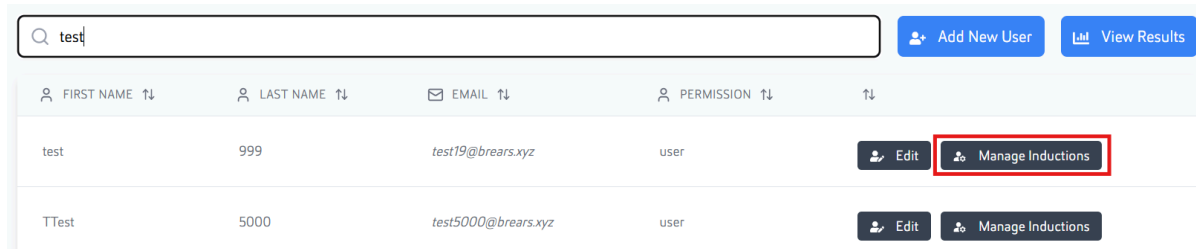
1.2. Search the user you would like to assign an induction to

On the View users page, using the search bar, search the users by email or name (first OR last name) to refine the results



1.3. Click the "Manage Assignments" button of the user

Find the user you would like to make induction assignments to and click "Manage Inductions" to be directed to the manage assignments page for the selected staff member.



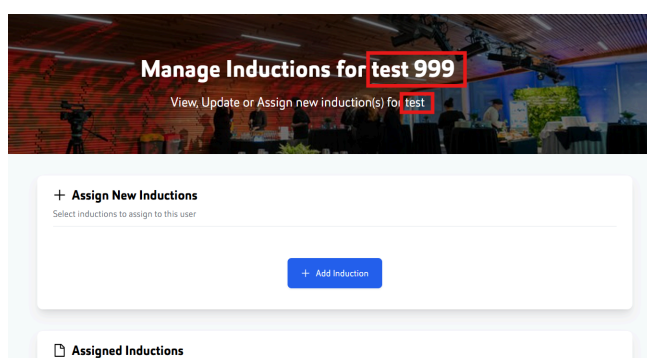
You will now be taken to the Manage Assignments page.

On the manage induction assignments page, you are able to add new induction assignments or view and manage existing assignments.

2. Manage existing Induction Assignment

2.1. Confirm selected staff member

First, confirm the name is correct and is the user you would like to view and manage an induction for, then scroll down to the Assigned Inductions Section



2.2. Assigned Induction Section Overview

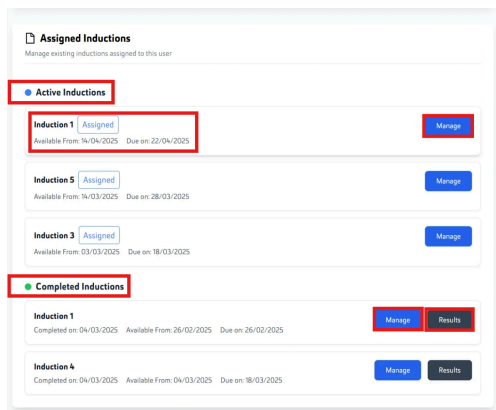
The second section on this page is for assigned inductions. It lists active inductions first, followed by completed inductions for the selected user.

Each induction assignment is separated into a card with the following information:

- Status (Assigned, In progress, Overdue or complete)
- Available from date
- Due date
- and a blue button to manage the assignment ("Manage")

Completed inductions also include the

- Date of Completion
- and a grey button to view the result/answers ("Results")



2.3. View & identify the Induction assignments

This section will display all inductions assigned to the user, with active inductions (those with the statuses assigned, in progress, or overdue) displayed first and completed inductions shown second.

Key information about the assignment is also displayed here for quick reference

Each induction assignment has a "Manage" button and on click will enable you to manage the assignment

Complete inductions also include a "Results" which will take you directly to the results page for this induction attempt.

2.4. Manage an induction assignment

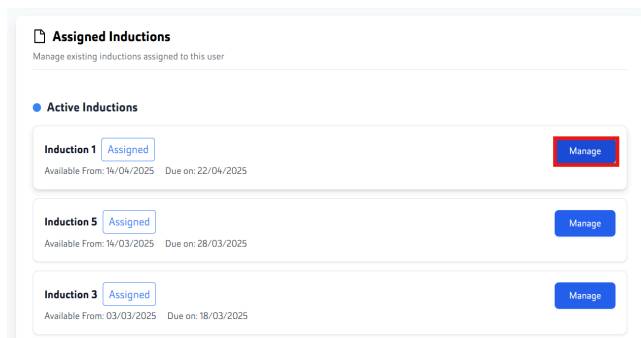
The following steps show you how to manage an induction assignment field.

They all start by identifying the induction assignment and clicking the blue "Manage" button to open the manage pop-up.

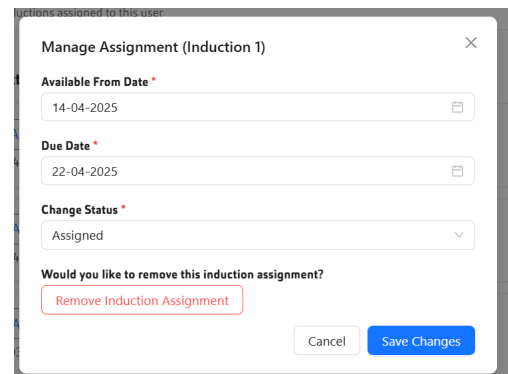
Available fields to manage include:

- Available from date
- Due date
- Completion date (Only if status is complete)
- Status
- or to delete the induction assignment

NOTE: The user will receive an email notification of the change (NO notification for a deleted induction currently)



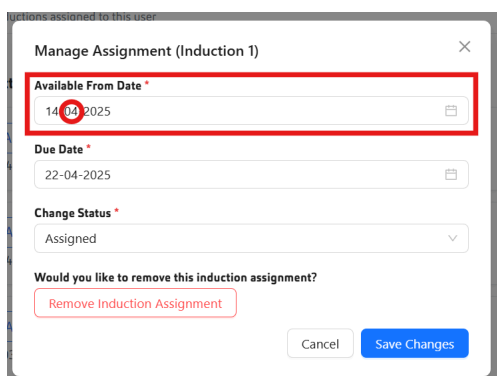
The 'Assigned Inductions' panel shows a list of three active inductions. Each entry includes an 'Assigned' status button and a 'Manage' button. The first entry, 'Induction 1', has an available date of 14/04/2025 and a due date of 22/04/2025. The second entry, 'Induction 5', has an available date of 14/03/2025 and a due date of 28/03/2025. The third entry, 'Induction 3', has an available date of 03/03/2025 and a due date of 18/03/2025.



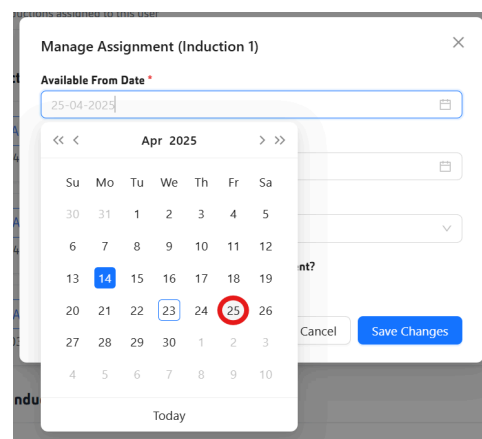
The 'Manage Assignment (Induction 1)' dialog box contains fields for 'Available From Date' (14-04-2025) and 'Due Date' (22-04-2025). It also features a 'Change Status' dropdown menu set to 'Assigned'. At the bottom, there is a question 'Would you like to remove this induction assignment?' with a 'Remove Induction Assignment' button, and 'Cancel' and 'Save Changes' buttons.

2.4.1. Change available from date

To change the available from date, click the current available from date field and select a new date using the date picker.



The 'Manage Assignment (Induction 1)' dialog box is shown with the 'Available From Date' field highlighted by a red rectangle. The current date is 14-04-2025.



A date picker calendar for April 2025 is displayed over the 'Manage Assignment (Induction 1)' dialog. The calendar shows the days of the week (Su to Sa) and the dates. The date 25 is circled in red, indicating the new 'Available From Date'.

2.4.2. Change Due Date

To change the Due date, click the current due date field and select a new date using the date picker

Manage Assignment (Induction 1)

Available From Date *
14-04-2025

Due Date *
22-04-2025

Change Status *
Assigned

Would you like to remove this induction assignment?
Remove Induction Assignment

Cancel Save Changes

Manage Assignment (Induction 1)

Available From Date *
14-04-2025

Due Date *
30-04-2025

Change Status *
Assigned

Would you like to remove this induction assignment?
Remove Induction Assignment

Cancel Save Changes

2.4.3. Change status

To change the induction status, please click the current status and select a new one from the dropdown list

Manage Assignment (Induction 1)

Available From Date *
14-04-2025

Due Date *
22-04-2025

Change Status *
Assigned

Would you like to remove this induction assignment?
Remove Induction Assignment

Cancel Save Changes

Manage Assignment (Induction 1)

Available From Date *
14-04-2025

Due Date *
22-04-2025

Change Status *
Assigned

Overdue
Assigned
In Progress
Complete

Would you like to remove this induction assignment?
Remove Induction Assignment

Cancel Save Changes

Available statuses include:

- Assigned (default for new assignments)
- Overdue
- In Progress (Changes to in progress when the user starts the induction)
- Complete (Changes to complete when an induction is finished and submitted)

2.4.4. Change completion date

To change the completion date, click the completion date field (if applicable) and select a new date using the date picker

NOTE: The completion date will only show and be available if the status for the induction is complete

Inductions assigned to this user

Manage Assignment (Induction 1)

Available From Date *

14-04-2025

Due Date *

22-04-2025

Change Status *

Complete

Completion Date *

23-04-2025

Would you like to remove this induction assignment?

Remove Induction Assignment

Cancel Save Changes

Inductions assigned to this user

Manage Assignment (Induction 1)

Available From Date *

14-04-2025

Due Date *

22-04-2025

Change Status *

Complete

Completion Date *

30-04-2025

Would you like to remove this induction assignment?

Remove Induction Assignment

Cancel Save Changes

2.4.5. Delete an induction assignment

To delete an induction assignment, click the red outlined "Delete induction Assignment" button, then confirm the deletion.

NOTE: This action cannot be undone!

That induction assignment will be delete along with any results/answers if it has been completed.

Inductions assigned to this user

Manage Assignment (Induction 1)

Available From Date *

14-04-2025

Due Date *

22-04-2025

Change Status *

Assigned

Would you like to remove this induction assignment?

Remove Induction Assignment

Cancel Save Changes

Assigned Inductions

Manage existing inductions assigned to this user

Active Induction

Induction 1

Available From: 14-04-2025

Due Date: 22-04-2025

Change Status: Assigned

Would you like to remove this induction assignment?

Are you sure you want to remove this induction assignment? This is a permanent action and cannot be undone.

No, Cancel Yes Remove

Would you like to remove this induction assignment?

Remove Induction Assignment

Cancel Save Changes

2.5 Save the changes

Make the required changes to the induction assignment, then click the pop-up's blue "Save Changes" button to apply the changes.

The changes will take effect immediately (It may require you or the user to refresh the page to see the changes)

NOTE: The user will receive an email notification all of the change (NO notification for a deleted induction currently)

You now know how to manage induction assignments :)

If you would like to learn how to assign a new induction, we also have a guide available for this

