EDGEauditor

User Guide: Tasks

Last Updated: May 20, 2021

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EDGEauditor

Overview

Welcome to EDGEauditor!

EDGEauditor helps resorts remove their reliance on paper-based forms, waivers and more by transitioning all of these pertinent documents into digital form. Whether you're a small family-operated resort or an operation with thousands of employees, this digitized tool will improve efficiency and accuracy while decreasing administrative overhead and mitigating risk.

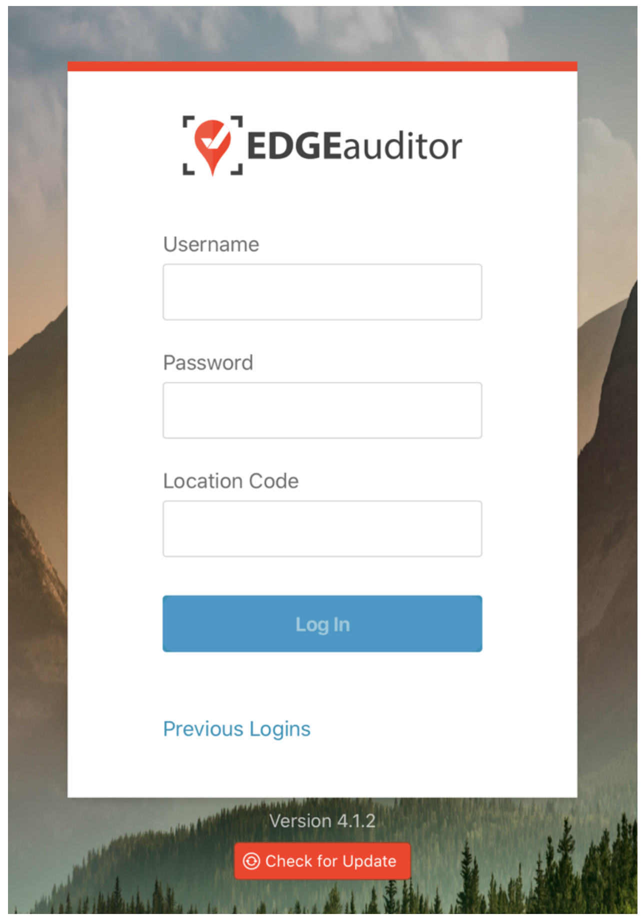
Some of the many benefits to using EDGEauditor are:

- Helping you maintain more consistent, complete and accurate reports with additional information that's just not possible with paper.
- Never having to deal with legacy versions of the software, or people using different versions. EDGEauditor is a SaaS (Software as a Service) solution so every update made to the software is automatically applied to every user.
- Desktop-based manager dashboard provides administrative users with a full 360-degree view of all reports, ability to approve or reject reports, add new sections or criteria to reports, export data and much more!
- Easily manage security and access permissions to each individual user so there's no need to worry about things going missing or being altered.
- Enable email and text alerts for incident reporting based on the criteria you set.
- Saving incident reports, daily logs, inspections and other reports locally on a tablet and then upload later when an internet connection is available.
- Through tablets and smartphones, your staff can start to catalog every piece of risk mitigation you have on your property.

Login

The login screen is a single point of entry into EDGEauditor. The EDGEauditor app is what groomers will use to track their progress grooming ski runs and other areas of your resort. The EDGEauditor manager dashboard is an online website where groomer managers will create the shifts and task priorities for groomers.

Accessing the EDGEauditor App



Mobile Device:

1. Download the EDGEauditor app from download.edgeauditor.com. You'll want to choose one of the download options that appears directly beneath the EDGEauditor RESORT logo.
2. Launch the app and on the login screen, enter your username, password and location code (case sensitive).
3. Tap the *Log In* button to log into the EDGEauditor application.

IMPORTANT: If you are using an iOS device, before you can access the app for the first time you will need to go into *Settings* > *General* > *Profile (or Device Management)* > *CloudStorm Solutions* > *Trust "CloudStorm"* > *Trust*.

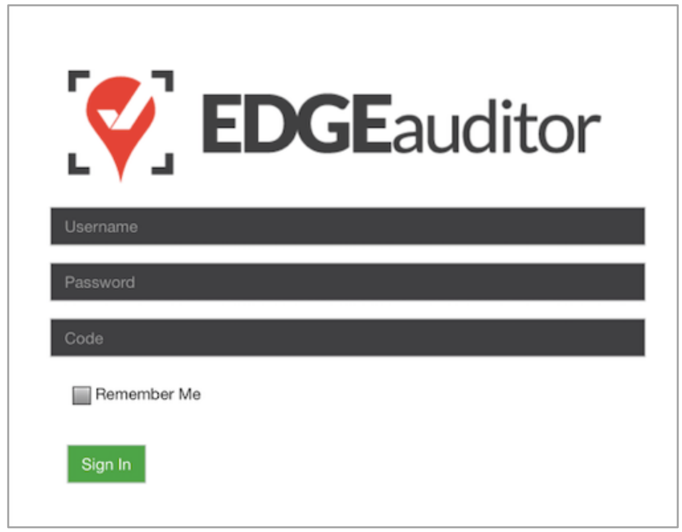
Desktop Computer:

1. Open Chrome browser and go to browser.edgeauditor.com.
2. On the login screen, enter your username, password and location code (case sensitive).
3. Click the 'Log In' button to log into the EDGEauditor application.

Accessing the EDGEauditor Manager Dashboard

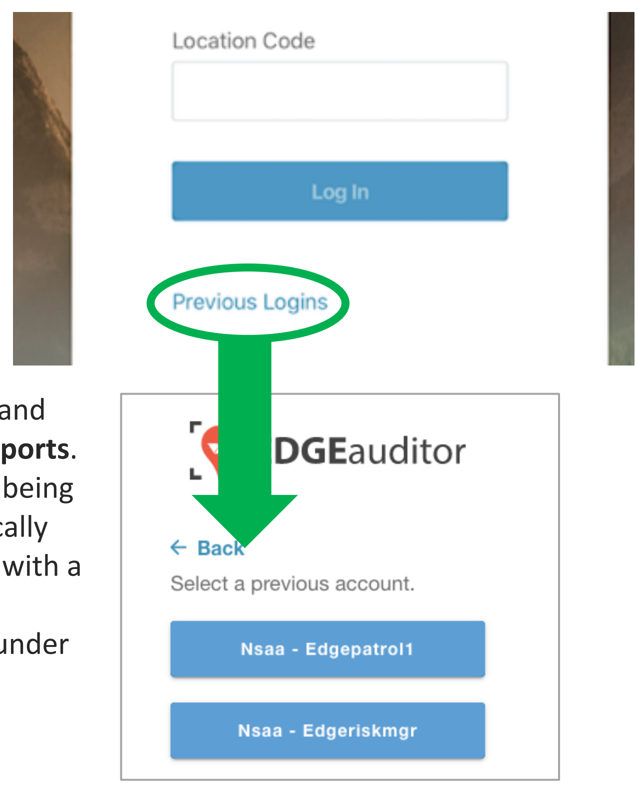
Desktop Computer:

1. Open Chrome browser and go to resort.edgeauditor.com.
2. On the login screen, enter your username, password and location code (case sensitive).
3. Click the *Sign In* button to log into the website.



Additional Notes

- Both the manager dashboard and the browser-based version of the app are optimized to work with Chrome browser.
- On the EDGEauditor app, if a previous login is saved it will be shown when you select *Previous Logins* located beneath the *Log In* button.
- You can then select the username and just add the password as a shortcut to login as that user. A maximum of 2 previous logins can be saved. If logging in with a third user, it will clear the other logins.
    - If either of those previous users have reports saved locally, the app will not be able to clear them until the user(s) logs in and clears the report(s) from **Pending Local Reports**. This login "failsafe" prevents reports from being accidentally deleted. If both users have locally saved reports you will not be able to login with a new user until one of the existing users submits/deletes the reports saved locally under their profile.

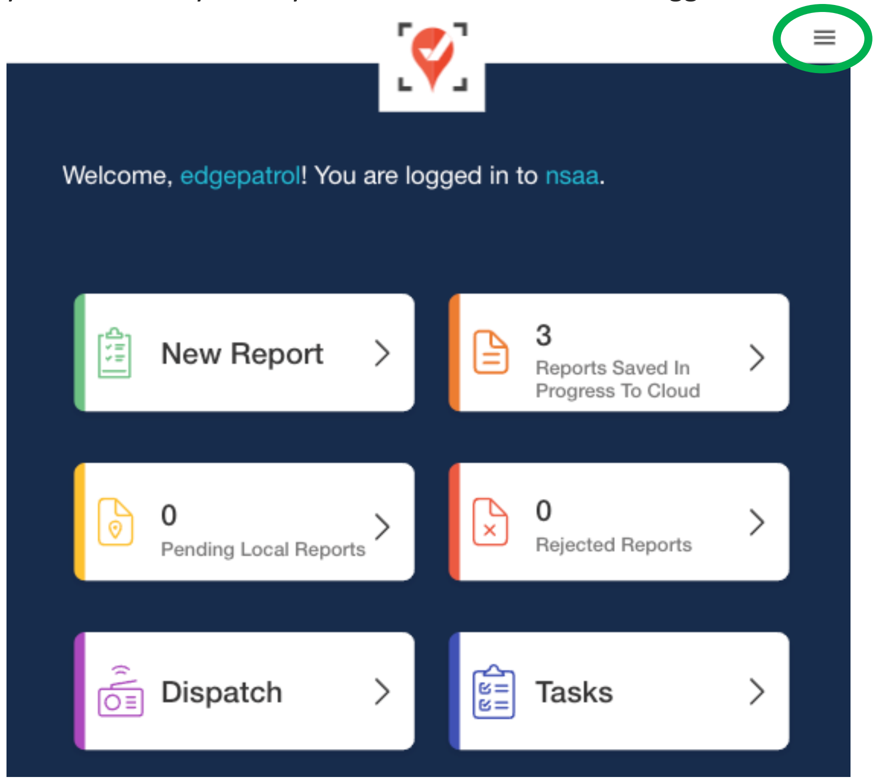


Getting Started

Upon successful login, you will be taken directly to the app home screen that shows each of the modules your user profile has access to. Access to specific modules are determined by the user permissions setup by your manager or those being used by your resort so you may not see all of these when logged in.

To access the settings for your account, select the menu icon located at the top right-hand corner of the main screen (circled in green on the image to the right). From settings you can:

- View your username and location.
- Log out of the app (be sure to do this every time you're finished using the app; this is a security feature to prevent unauthorized access to your account).
- Change your password – if your user profile allows for this (make sure you either memorize it or write it down and keep it in a safe place so you have it when needed).



Online / Offline Mode

The mobile app version of EDGEauditor that can be used on a phone or tablet allows you to use certain features even without an internet or cellular connection. <u>The only modules that can be used in OFFLINE mode are **Reports** (incident report and other reports), **Emergency Operation Plans** and **Health & Safety**.</u> However, functionality may be limited (e.g., location mapping will not be available on the incident report). You will know whether your device is connected by the ONLINE / OFFLINE icon that appears in the top right-hand corner of most screens on the app. If your connection status changes, the icon will change to reflect this. Depending on the screen size of your device, you may just see the connected/disconnected icon.

Tasks

Staff at your property have daily tasks that must be performed – everything from vehicle inspections to ensuring the first aid room is sanitized and properly stocked. With EDGEauditor's **Tasks** module you can easily manage all of your recurring or ad hoc tasks in one place. Through **Tasks** you can create templates and set the status to active so each day a new set of the same tasks are sent to staff to complete. What's even better is the **Tasks** module empowers staff – if a ski patroller sees a fallen tree blocking a trail they can pull out their mobile device and create a task on the spot for maintenance to remove the tree – complete with pictures and detailed notes so maintenance knows exactly where to go and what to look for.

This user guide will walk you through how to setup 3 different types of tasks:

1. *Task Templates* > for daily or recurring tasks
2. Incident Tasks > creating tasks that are linked directly to an incident report
3. Ad Hoc Tasks > creating one-time tasks

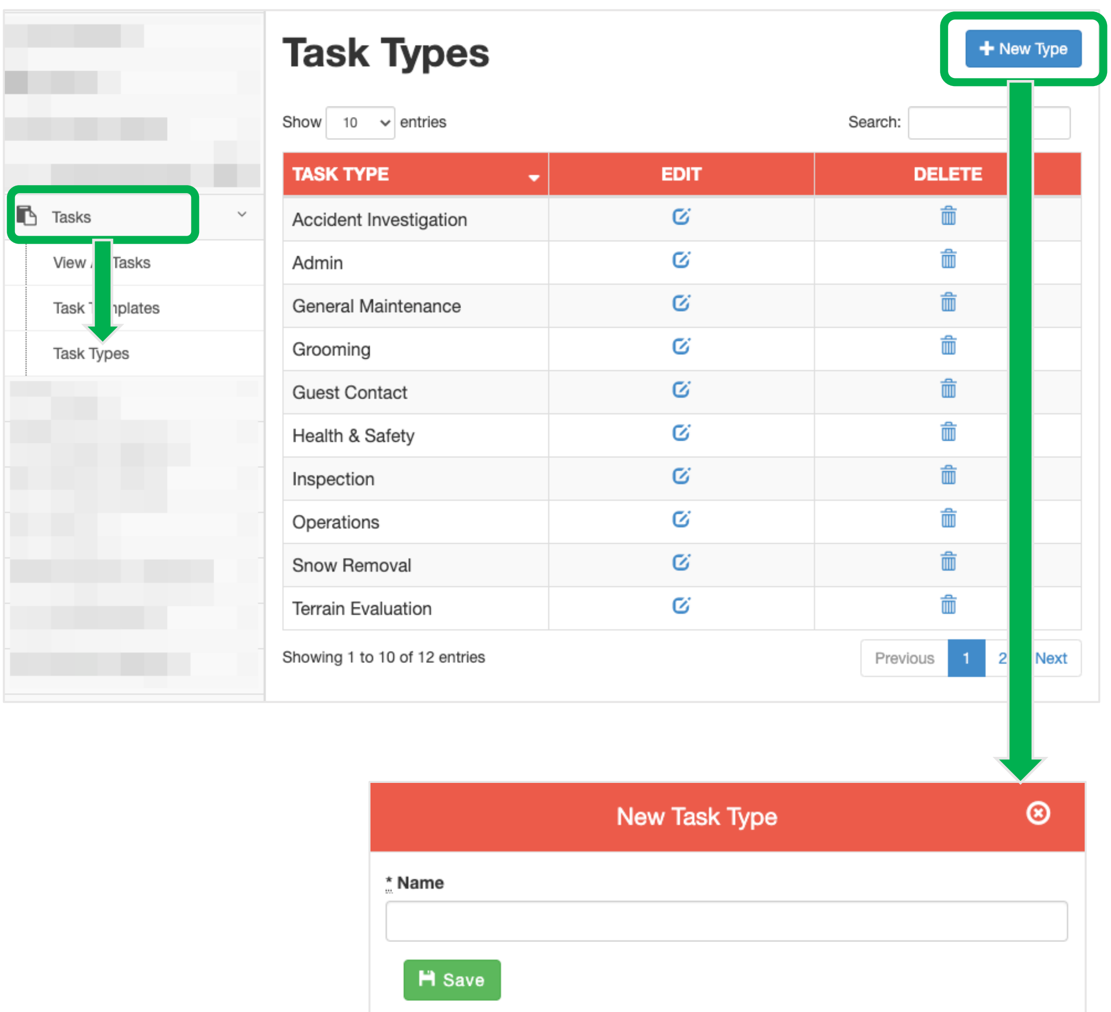
We are going to look at the manager dashboard first as some initial setup will be required before you can make full use of the **Tasks** module on the EDGEauditor app.

Task Management – Manager Dashboard

Task Types (Manager Dashboard)

To start using the Tasks module one of the first things you will want to do is create types for the different tasks so they can be categorized accordingly.

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.
2. From the side navigation, go to *Tasks > Task Types* and click on the *New Type* button.
3. In the new window that opens, add your task type and select *Save*.
4. Repeat steps 1 through 3 for each task type you want to create.



Task Templates – Main Screen (Manager Dashboard)

Now that your task types are in place you're ready to start building task templates for daily tasks or a series of tasks that must be completed when a certain situation occurs at your property (e.g., accident investigation).

IMPORTANT NOTE: Task templates can only be created using the manager dashboard.

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.

2. From the side navigation, go to *Tasks > Task Templates*.

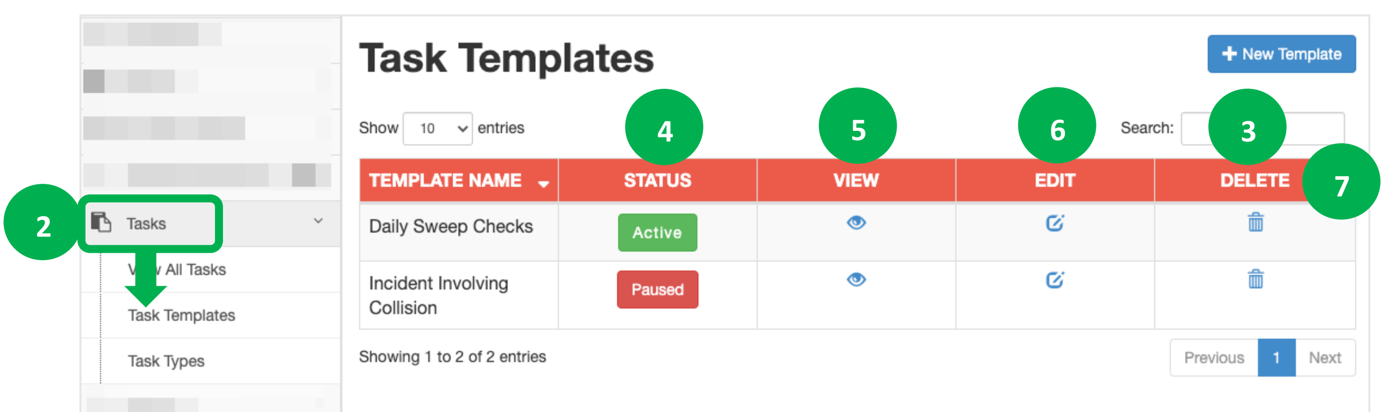
3. You can use the search box to quickly locate a template.

4. The STATUS column indicates whether the template is 'Active' or 'Paused'. If 'Active', then each day all tasks associated with the template will be sent to the EDGEauditor app so staff can see they have tasks to complete. Templates can also be 'Paused' so if your resort is only open during the winter months pausing the template will ensure tasks are not being sent to the app when no one would be completing them. 'Paused' is also useful in cases where you want to create a series of tasks that must be completed but they are not part of daily checks (e.g., accident investigation).

5. The VIEW column will open up a read-only version of the template so you can see all the tasks belonging to it and the associated information for each.

6. The EDIT column allows you to edit any of the fields within a previously created task template.

7. The DELETE column will delete the task template. Any previously completed tasks associated with this template will not be deleted.



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Task Templates – Creating a New Template (Manager Dashboard)

While still on the main tasks template screen, find the *New Template* button that is located in the top right-hand corner and select it.

NOTE: The numbers below correspond to the screen shot of an empty task template as shown on page 12.

1. *Template Name*
    - Name your template – it should reflect the nature of the tasks so other users can easily locate it if they need to modify or pause it. This is a mandatory field.

2. *Task*
    - Include a short write up of what the task is. In other words, the specific action you want the staff member to take. Examples include *complete daily sweep report*, *clean and sanitize first aid area*, *shovel snow around all main entrances*. This is a mandatory field.

3. *Department*
    - You can assign tasks to different departments so when frontline staff access the **Tasks** module they can apply a filter to only see open tasks for their department.
    - Departments can be added at https://resort.edgeauditor.com/departments

4. *Area*
    - Similar to departments, you can also link your task to a specific area so when frontline staff access the **Tasks** module they can apply a filter to only see open tasks for a specific area.
    - Areas can be added at https://resort.edgeauditor.com/areas

5. *Feature*
    - Similar to departments and areas, you can also link your task to a specific feature. Features are ski runs, lifts, parks, trails or signs.
    - If you use the same name across multiple features a short form will be added in brackets to the end of the name to indicate what feature type it is. The short forms used are as follows:
        - Ski Run = SR
        - Lift = L
        - Park =
        - Sign = S

6. *Type*
    - This is where you can categorize the type of task being completed, such as admin, operations, inspection, accident investigation, trail checks and so on.

- Task types can be created at https://resort.edgeauditor.com/task_types

7. *Priority*
    - You can assign a priority of *High*, *Medium* or *Low* so frontline staff know the level of urgency associated with the task.

8. *Current Date*
    - If selected, as long as the template is in an 'Active' status this task will be due on whatever today's date is.

9. *Add Days*
    - This field can only be used if *Current Date* has been selected. It allows you to select a task due date from 1 to 30 days into the future. It uses the *Current Date* field to calculate it.
    - This feature is intended for use with non-daily task templates. For example, if you created an accident investigation task template you could have a task of *build investigation package* and give the person responsible 3 days to complete it. So if today's date is March 3rd (*Current Date* when the template is made 'Active') the due date would be March 6th.

10. *Action*
    - A task can have an action of either 'Complete Task' or 'Complete Report'.
    - If 'Complete Report' is chosen a new field called *Report Name* will appear where you can select the specific report to be completed (IMPORTANT NOTE: this report needs to be added to EDGEauditor first before it can be selected). *Action* is a mandatory field.

11. *Notes*
    - Allows you to add further details or instructions regarding the task.

12. *Photo Placeholder image*
    - This allows you to add images to the task. The maximum file size of each image is 5MB.
    - Accepted image formats are JPEG/JPG or PNG.

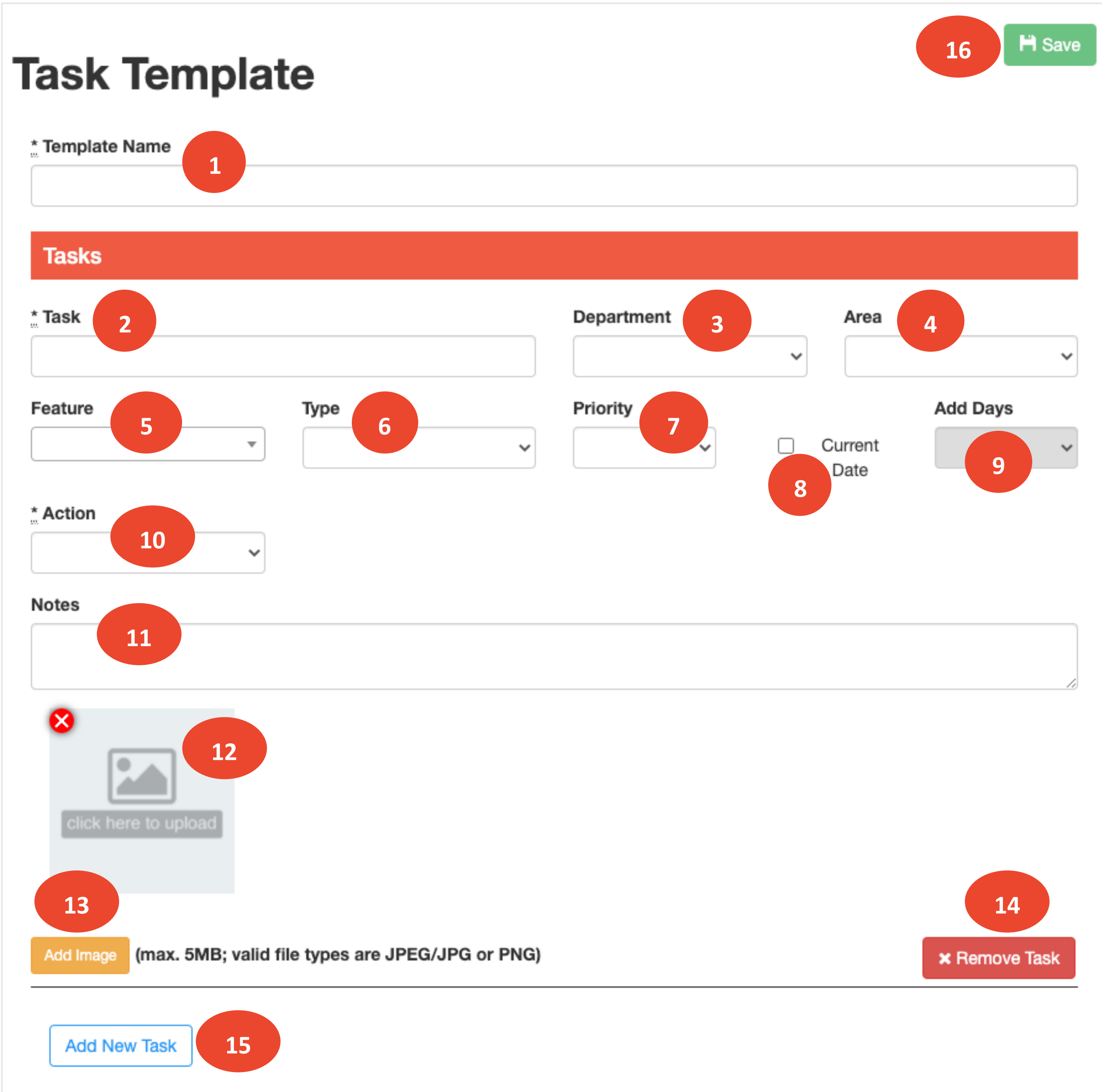
13. *Add Image*
    - Selecting this button allows you to add more than one image to the same task.

14. *Add New Task*
    - This will create a new task within the task template. It will contain all the same fields as the first task in the template.
    - There is no limit to the number of tasks that can be added to a task template.

15. *Remove Task*
    - If you added a task in error or need to modify your template in the future you can select the *Remove Task* button to delete a specific task, rather than the entire template.

16. Save

- Once you have added all your tasks, select the green *Save* button in the top right-hand corner of the screen. You will be redirected back to the main tasks template screen with a confirmation message that your template has been successfully created.



Creating Tasks Linked to an Incident Report (Manager Dashboard)

There may be times when additional tasks relating to an incident report are required – such as completing accident investigation reports, patient follow up or attaching photos. With the **Tasks** module you can create these ‘to-do’s’ directly within the incident report so they are linked to that specific incident.

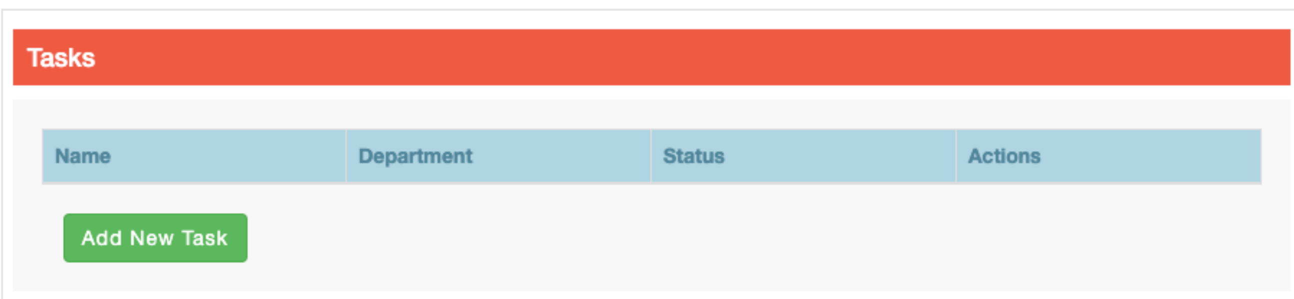
Tasks linked to an incident report can be created on both the manager dashboard and the app that frontline staff use. Right now we’ll go through the steps on how to create these tasks using the manager dashboard.

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.

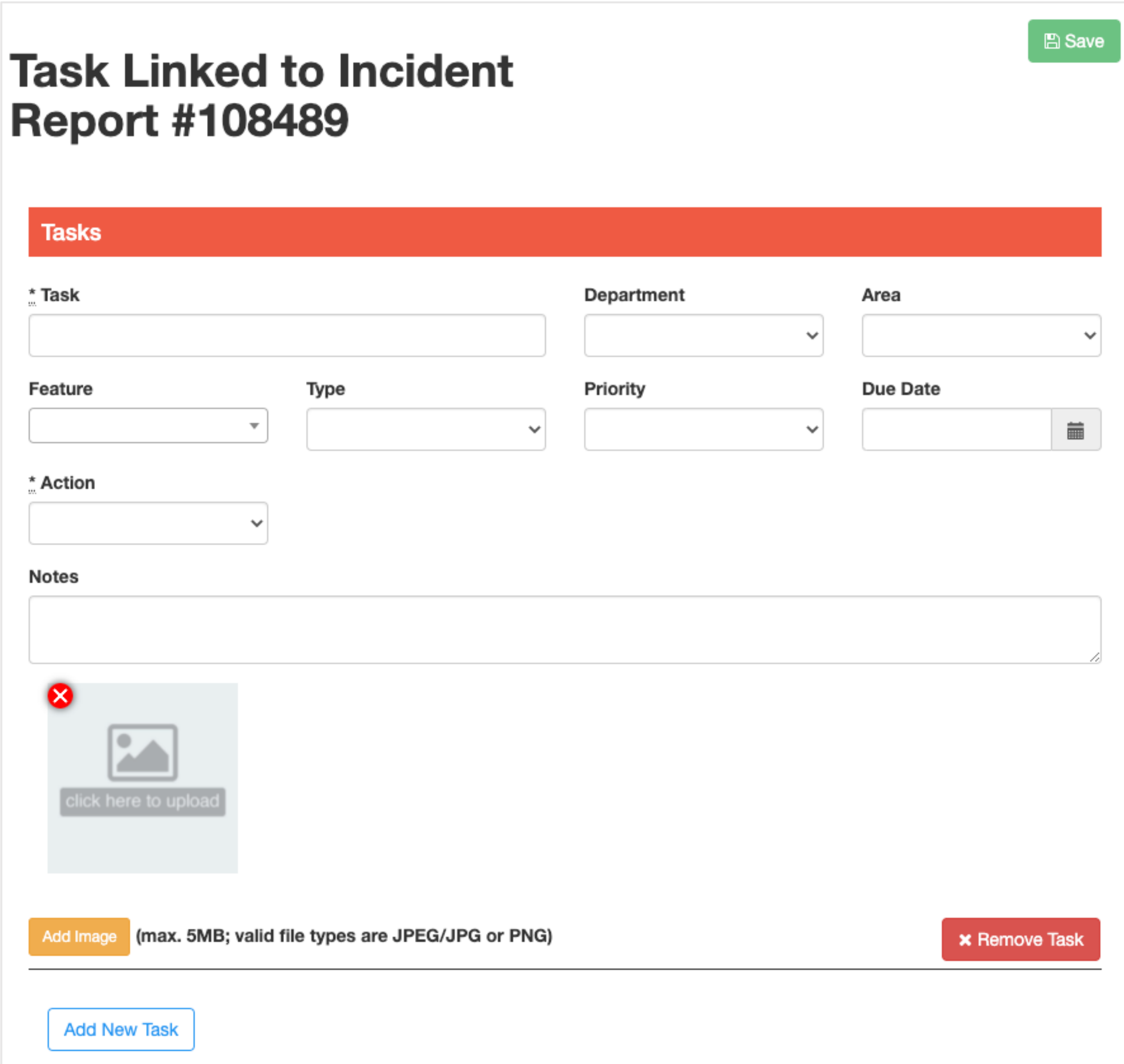
2. From the side navigation select *Incident Reports > View All Incidents*.

3. Find the incident report you want to add a task to and then click the *View* or *Review* button to open that incident report.

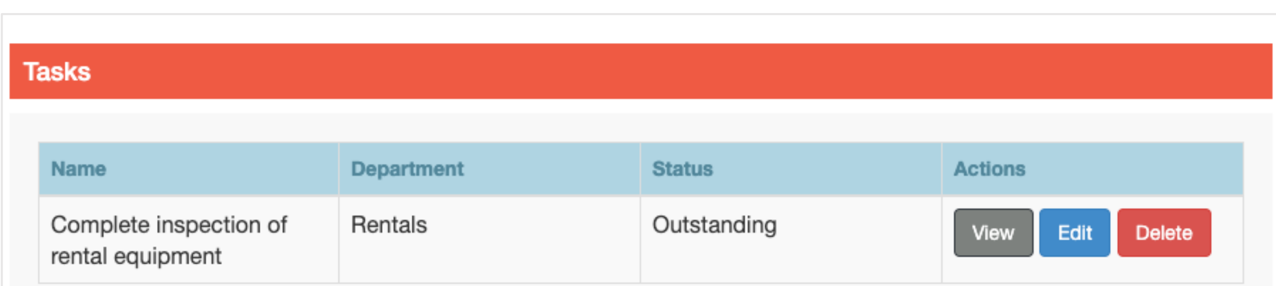
4. At the top of the incident report you will see a section called ‘Tasks’. Select the *Add New Task* button.



5. An empty tasks form will appear with most of the same fields as the task template (*see next page for screenshot*). Complete the form and when you are done select the green *Save* button located in the top-right hand corner. You will then be routed back to the incident report where the new task you added is now visible in the Tasks table.
    - Since this is a one-time task, the *Due Date* field replaces the *Current Date* and *Add Days* fields that were available for tasks that are part of a task template.
    - Mandatory fields are *Task* and *Action*.
    - Once the task is created it will be assigned a default status of ‘Outstanding’.



6. Similar to task templates, you can perform various actions for the task:
   - *View >* opens a read-only version of the task.
   - *Edit >* allows you to modify the task, including the ability to change the status from 'Outstanding' to 'Completed', adding the name of the person who completed the task and any corresponding notes.
   - *Delete >* This will remove the task.

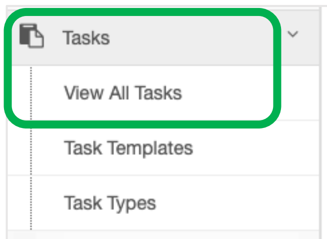


Creating Ad Hoc Tasks (Manager Dashboard)

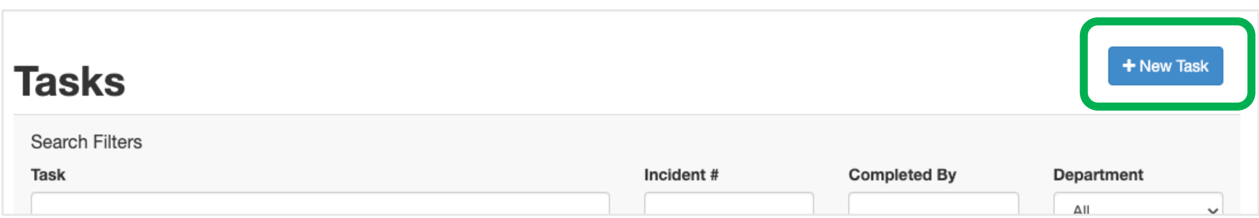
One of the main benefits of the **Tasks** module is the ability to create tasks 'on the fly' as they are needed. These ad hoc tasks are independent of task templates and incident reports. Ad hoc tasks can be created on both the manager dashboard and the app that frontline staff use. Right now we'll go through the steps on how to create these tasks using the manager dashboard.

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.

2. From the side navigation select *Tasks > View All Tasks*.



3. Select the *New Task* button located in the top right-hand corner of the screen.



4. An empty tasks form will appear that is identical to when tasks are created that are linked to an incident report. Complete the form and when you are done select the green *Save* button located in the top-right hand corner.
   - Mandatory fields are *Task* and *Action*.
   - Once the task is created it will be assigned a default status of 'Outstanding'.

5. Similar to task templates and tasks linked to incident reports, you can perform various actions for the task while on the manager dashboard. If you go to https://resort.edgeauditor.com/tasks you can locate the task there, and under the ACTIONS column you will see
   - *View >* opens a read-only version of the task.
   - *Edit >* allows you to modify the task, including the ability to change the status from 'Outstanding' to 'Completed', adding the name of the person who completed the task and any corresponding notes.
   - *Delete >* This will remove the task.

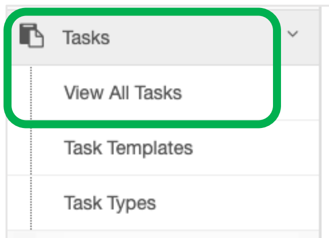
View All Tasks (Manager Dashboard)

The manager dashboard provides a master view for all tasks that have been created, including tasks that are assigned to task templates. If a template has a status of 'Paused' no new tasks from that template will appear on the master view until the status is changed to 'Active'.

IMPORTANT NOTE: The default view for this table will be those tasks belonging to all *Departments* that have a status of *Outstanding* and the task type is *Individual Tasks* (so those tasks that are linked to incident report or ad-hoc tasks).

1. To reach this master view, login to the manager dashboard at resort.edgeauditor.com from a desktop computer.

2. From the side navigation select *Tasks > View All Tasks*.



3. You can use the various search filters at the top to quickly locate a specific task (*see screenshot on next page*).

4. All columns except ACTIONS can be sorted in ascending/descending order (*see screenshot on next page*).

5. Within the ACTIONS column you can perform the following actions (*see screenshot on next page*):
    - *View >* opens a read-only version of the task.
    - *Edit >* allows you to modify the task, including the ability to change the status from 'Outstanding' to 'Completed', adding the name of the person who completed the task and any corresponding notes. For tasks that are linked to a task template you will only be able to modify the *Status*, *Completed* and *Notes/Comments* fields. Any other changes must be made to the corresponding task template since it will update for all future tasks initiated from that template.
    - *Delete >* This will remove the task.

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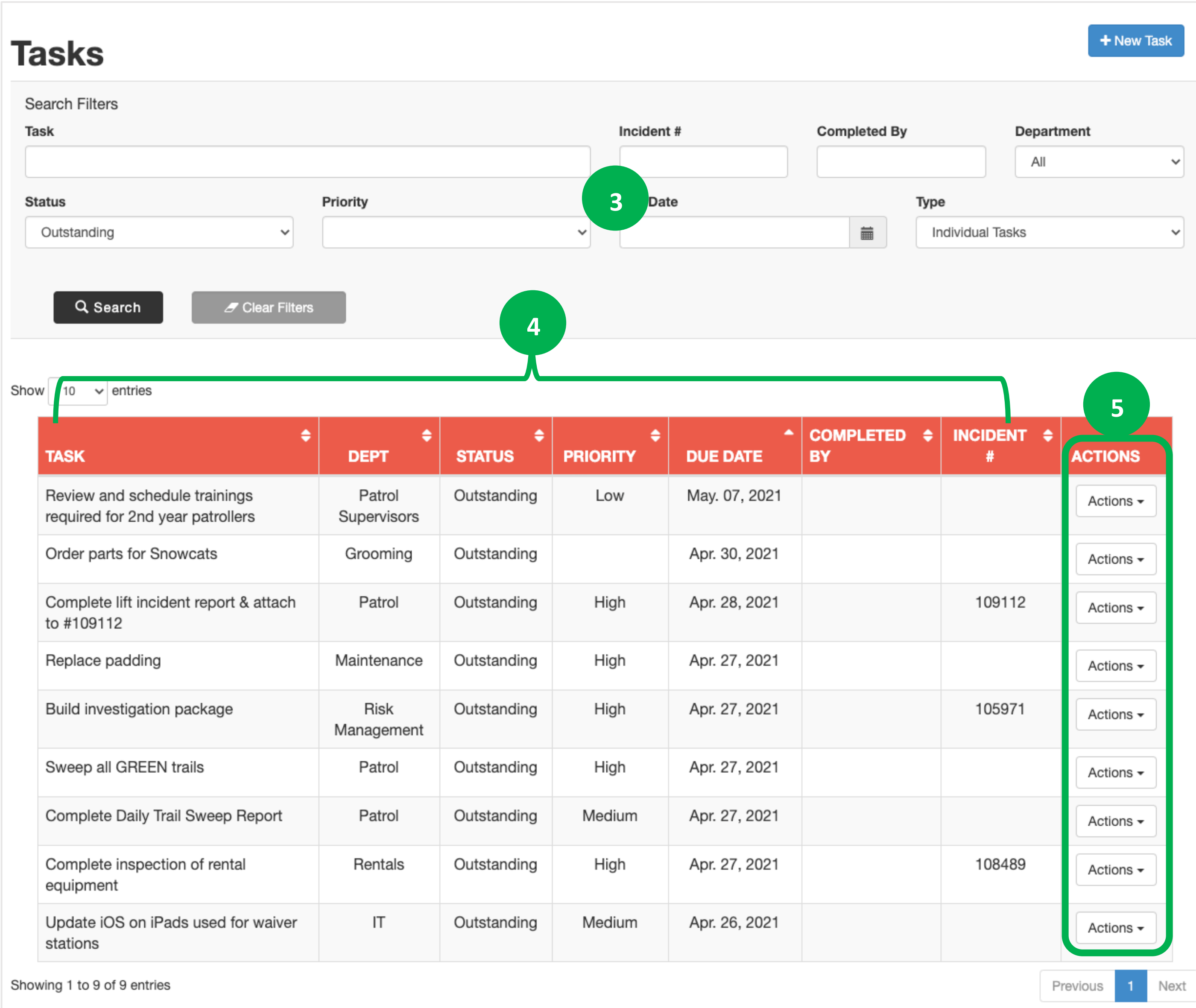


Task Management – App

Now that we've walked through the task management functionality available on the manager dashboard we'll look at the view of **Tasks** staff will see when they login to the app.

Note: Numbers 3 through 7 below correspond to the screen shot of the main tasks screen as shown on page 19.

Tasks Main Screen (App)

1. Login to the EDGEauditor app with your user credentials and resort code.

2. Select the **Tasks** module.

3. To add a new task, select the *Add Task* button.

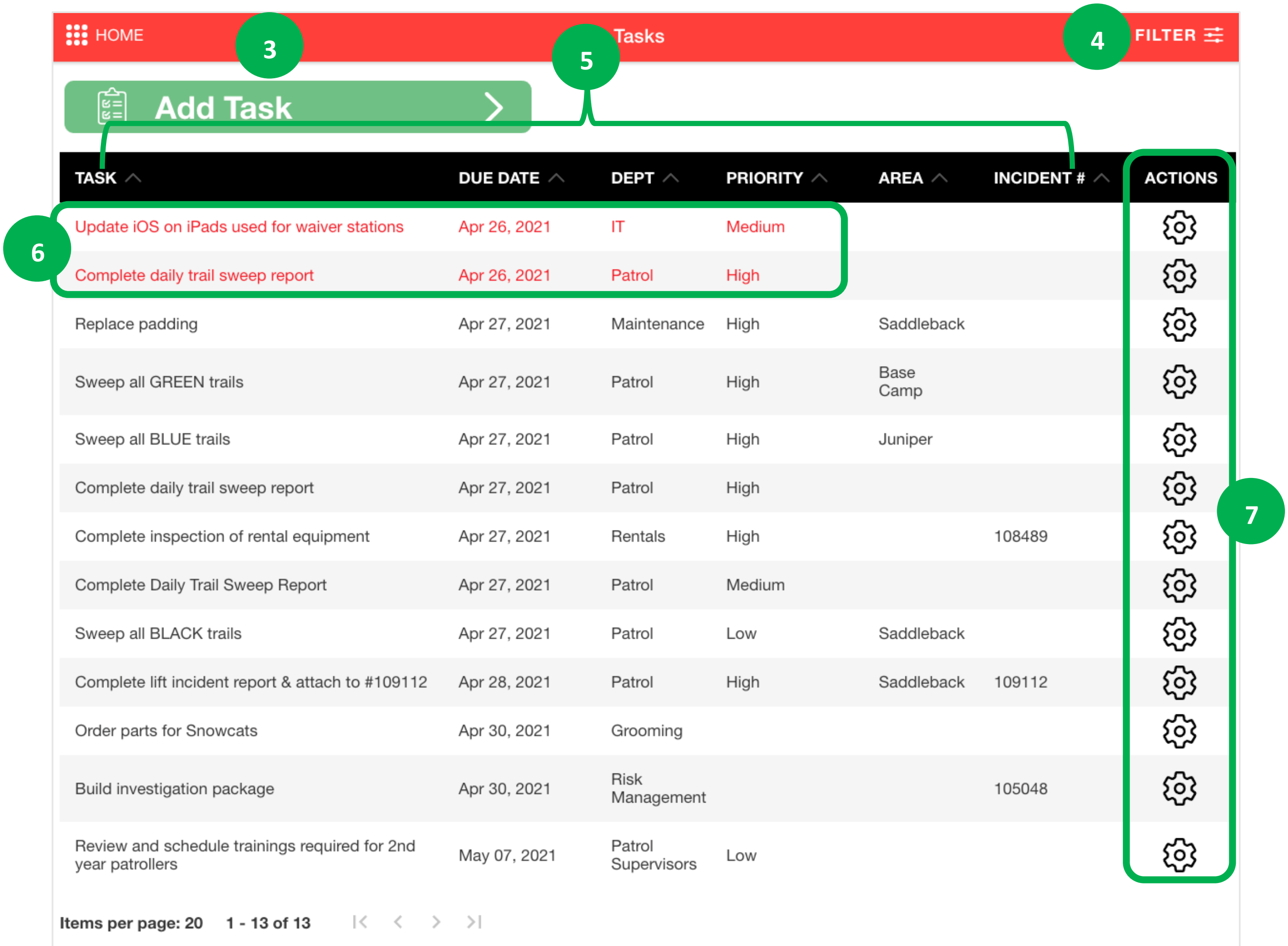
4. To filter the view, select the FILTER button in the top right-corner.
    - Available filters are *Department*, *Area* and *Priority*.
    - To remove any applied filter(s) select the *Remove Filters* button when you have the filter view open.

5. All columns except ACTIONS can be sorted in ascending/descending order

6. Any tasks in red are overdue and will appear at the top.

7. Selecting the 'gear' icon under the ACTIONS column will display up to 3 possible actions for a task:
    - *View Task* > Opens up a more detailed view of what the task involves, including any notes or photos that are attached. From this view, you can also toggle over to the 'Finish Task' screen which is described below.
    - *Finish Task* > The staff member should select this option if they have completed this task. This is where they will record the name of the person who completed the task along with any notes (optional). From this view, you can also toggle over to the 'View Task' screen which is described above.
    - *Complete Report* > <u>This option will only be available if the action set for the task is 'Complete Report'</u>. Selecting 'Complete Report' will redirect the user to the specific report within EDGEauditor that requires completion. Once that report has been submitted the staff member will need to return to this screen and choose the 'Finish Task' option.

IMPORTANT NOTE: Once a staff member has selected the *Submit and Finish Task* button from the 'Finish Task' screen, the task status will be automatically changed to 'Completed'. Performing this action will remove the task from the app so staff can stay focused on any remaining outstanding tasks.



Adding a New Task (App)

As mentioned earlier in this guide one of the benefits of the **Tasks** module is it empowers frontline staff to create tasks on the fly from their mobile device. Now we'll walk through how to create a task using the app.

Note: Numbers 2 through 13 below correspond to the screen shot of the new task screen as shown on page 22.

1. To add a new task, select the *Add Task* button from the main tasks screen.

2. If the task needs to be linked to an incident report, select the *LINK TO INCIDENT REPORT* button and input the patient last name or the incident report # to locate that report and link it to the task by selecting it from the list of options that appear.

3. *Task Name*
   - Include a short write up of what the task is. In other words, the specific action you want the staff member to take. Examples include *repair fencing on Warp Drive*, *clean and sanitize first aid area*, *shovel snow around all main entrances*. This is a mandatory field.

4. *Action*
   - A task can have an action of either 'Complete Task' or 'Complete Report'.
   - If 'Complete Report' is chosen a new field called *Report Name* will appear where you can select the specific report to be completed (IMPORTANT NOTE: this report needs to be added to EDGEauditor first). *Action* is a mandatory field.

5. *Department*
   - You can assign tasks to different departments so when frontline staff access the **Tasks** module they can apply a filter to only see open tasks for their department.

6. *Area*
   - Similar to departments, you can also link your task to a specific area so when frontline staff access the **Tasks** module they can apply a filter to only see open tasks for a specific area.

7. *Feature*
   - Similar to departments and areas, you can also link your task to a specific feature. Available features are ski runs, lifts, parks, trails or signs.
   - If your resort uses the same name across multiple features a short form will be added in brackets to the end of the name to indicate what feature type it is. The short forms used are as follows:
     - Ski Run = SR

- Lift = L
- Park =
- Sign = S

8. *Type*
    - This is where you can categorize the type of task being completed, such as admin, operations, inspection, accident investigation, trail checks and so on.

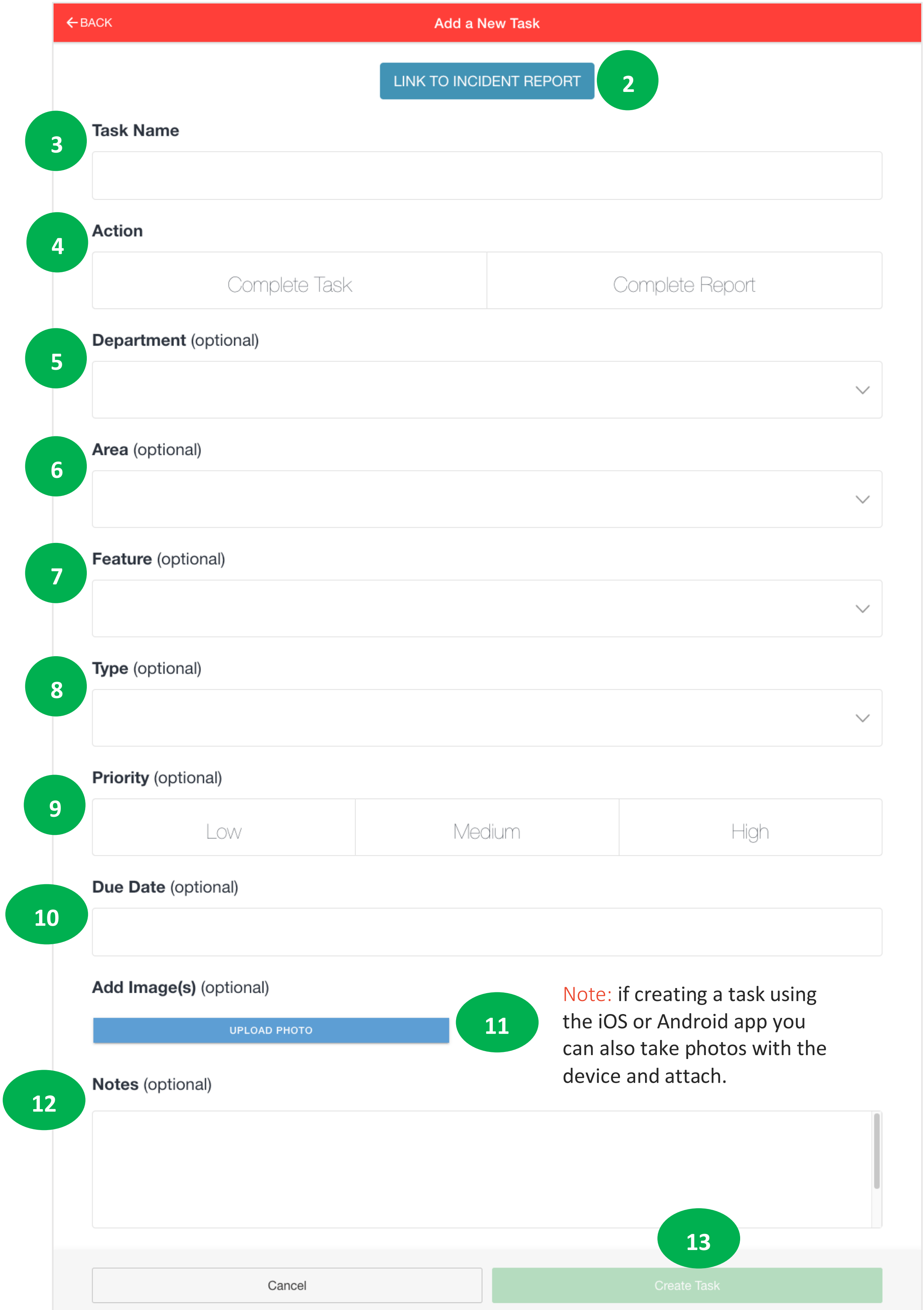
9. *Priority*
    - You can assign a priority of *High*, *Medium* or *Low* so frontline staff know the level of urgency associated with the task.

10. *Due Date*
    - Use the calendar picker to select the date the task is due.

11. *Notes*
    - Allows you to add further details or instructions regarding the task.

12. *Add Image*
    - Selecting this button allows you to attach photos to the task.

13. *Create Task*
    - Once you have added all the information pertaining to the task (or at a minimum the mandatory fields), select the green *Create Task* button at the bottom of the screen. You will be redirected back to the main tasks template screen with a confirmation message that your task has been successfully created.



Note: if creating a task using the iOS or Android app you can also take photos with the device and attach.

Technical Escalation Process

Escalations may be required when team members encounter technical issues within the application. Before contacting EDGEauditor support, please ensure you:

1. Determine if the issue is isolated to a single or handful of devices or affecting all tablets.
2. Armed with the above information, contact your IT resource so they can do some internal troubleshooting first in the event it is internet related.

If your internal IT department cannot resolve the issue, please follow these steps for incident reporting to EDGEauditor:

- Go to https://edgeauditor.zendesk.com/hc/en-us/requests/new and complete the required information in order to submit your ticket. The more information you are able to provide the easier it will be for the support team to troubleshoot. Otherwise, you can open a ticket by sending an email to support@edgeauditor.com.
- For severity Level 1 Service Incidents (defined below), please call 1-866-485-3571.

Business Hours Support

- For severity Level 1 Service Incidents, support is available 24 hours a day, seven days a week.
- All other service incidents will be handled during EDGEauditor business hours:
    - 9:00am to 5:00pm ET Monday to Friday (except statutory holidays observed in the province of Ontario, Canada)

After Business Hours Support

EDGEauditor provides after hours technical support should resorts encounter Level 1 Service Incidents, which are defined as:

- Application is not accessible on all devices.
- Application is accessible but major functions (e.g., saving) are unusable to the extent that the normal business use of the application is significantly impeded.

For support after hours and during statutory holidays, please call 1-866-485-3571 or send an email to support@edgeauditor.com