

# LEARNING ASSIGNMENT TOOL

## STARTER GUIDE

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### WHAT'S NEW WITH THE OCTOBER '21 RELEASE

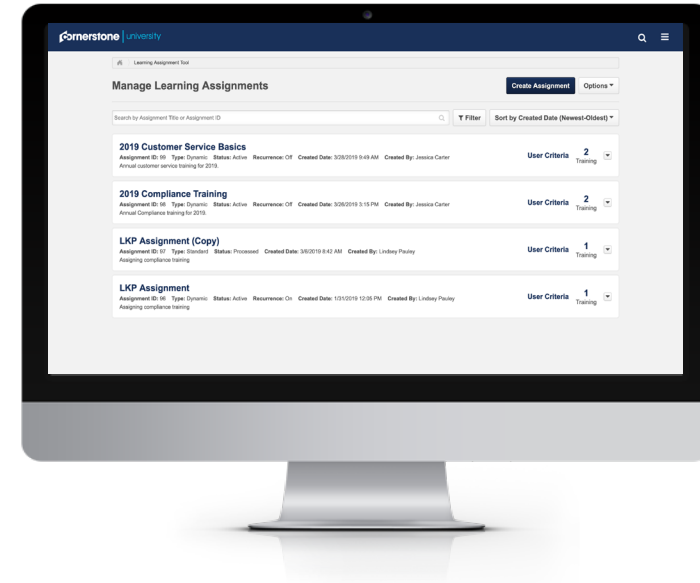


## WHAT IS THE LEARNING ASSIGNMENT TOOL?

The Learning Assignment Tool streamlines all aspects of administering learning assignments by providing a refined, intuitive workflow to manage, create, and track learning assignments.

## USER STORIES

Lindsay is a Learning Administrator at Acme Corp. A major responsibility of Lindsay's is to assign one or more training items to several users at a time, so she frequently uses the Learning Assignment Tool to do so. Upon opening the Learning Assignment Tool, Lindsay can quickly create a new assignment or resume a draft she previously created. When Lindsay is creating a new assignment, user-friendly wording, enhanced visuals, clear error notifications and a logical workflow help her clearly understand the outcomes of her selections, so she never has a doubt when clicking submit. When Lindsay is ready to follow-up on assignments she's created, it's easier than ever to find the one she wants to review since she can narrow her search by the custom Assignment Title she provided, and system generated Assignment ID. Once found, it only takes her one click to get to a comprehensive summary page that houses the assignment settings, transcript history details for each user, and training progress summary within the assignment. Overall, Lindsay can create assignments confidently, track them intelligently and manage them easily with the Learning Assignment Tool - ultimately ensuring the right users get the right training at the right time.



## GETTING STARTED

### PERMISSIONS

All of the permissions related to the Learning Assignment Tool can be found in [Online Help](#). The below permission grants access to the Assignment Tool Preferences page

- **Assignment Tool Preferences:** Grants access to Assignment Tool Preferences where an administrator can activate the new Assignment Tool and configure the processing options and settings to create Learning Assignments. This permission cannot be constrained.

### ASSIGNMENT TOOL PREFERENCES

Admin > Tools > Learning > Learning Preferences > Assignment Tool Preferences

The Learning Assignment Tool Preferences page allows administrators to configure the settings for newly created learning assignments.

- The **Enable Dynamic Re-assignment** and **Re-assign latest version** toggles determine the default settings that administrators will see for these options when creating new learning assignments.
- The **High User Count Warning** lets you set the threshold that will trigger the High User Count warning to appear when submitting a new Learning Assignment. The threshold can be set as a percentage down to the hundredth value or by an exact number.
- The **Prerequisite Options** section allows you to determine whether or not training prerequisite requirements will be respected for all new learning assignments and existing dynamic assignments.

### ACCESS

You can access the Learning Assignment Tool from two places: 1. From the Navigation Tabs or 2. From the Learning Assignment Tool link (Admin > Learning > Learning Assignment Tool).

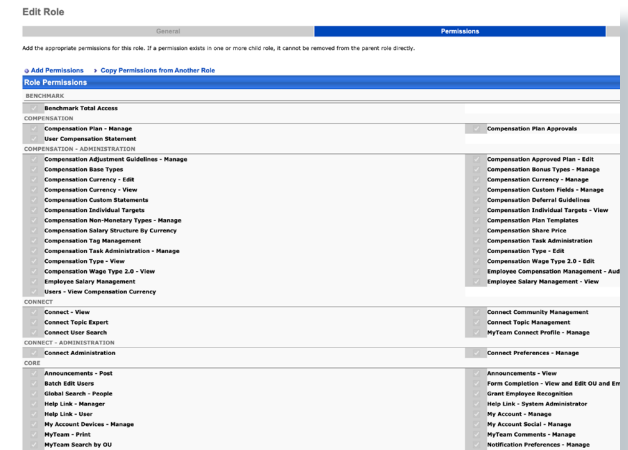


Figure 1. The Security Role Administration permissions page

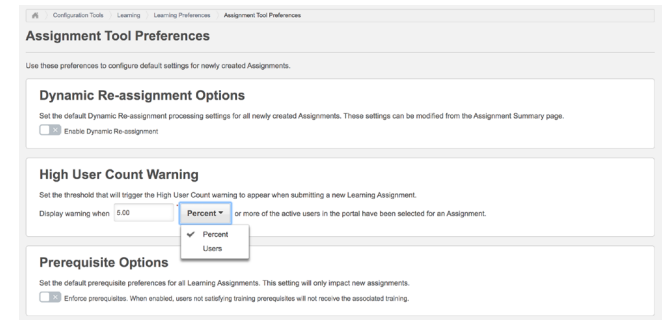


Figure 2. The Assignment Tool Preferences page

## THE LANDING PAGE

When you navigate to the Learning Assignment Tool, you're brought to the landing page, Manage Learning Assignments. This is where you'll begin creating new Assignments or manage assignments you previously created. For assignments you previously created, you can quickly view high level information, such as the status or training associated with the assignment, or take actions, such as canceling queued Standard Assignments, redirect to the Summary Page, or even resume a draft you previously started.

Select the call-outs below to learn more about the different options on the page.

The screenshot shows the 'Manage Learning Assignments' interface. At the top, there is a navigation bar with a 'Create Assignment' button and an 'Options' dropdown. Below this is a search and filter section with a search bar and a 'Filter' button. The main content area displays a list of assignments with details such as title, ID, type, status, recurrence, created date, and creator. Each assignment entry includes a 'User Criteria' section with a dropdown menu. Call-out boxes highlight the following features:

- CREATE ASSIGNMENT**: Points to the 'Create Assignment' button in the top right.
- CERTIFICATION & VOLUNTEER ENROLLMENTS**: Points to the 'Options' dropdown menu.
- SEARCH & FILTER**: Points to the search bar and filter button.
- VIEW USER CRITERIA & TRAINING**: Points to the 'User Criteria' dropdown for the first assignment.
- ASSIGNMENT SUMMARY PAGE**: Points to the 'LKP Assignment (Copy)' entry.
- ASSIGNMENT OPTIONS**: Points to the 'User Criteria' dropdown for the last assignment.

Assignment Title	Assignment ID	Type	Status	Recurrence	Created Date	Created By	User Criteria
2019 Customer Service Basics	99	Dynamic	Active	Off	3/28/2019 9:49 AM	Jessica Carter	2 Training
2019 Compliance Training	98	Dynamic	Active	Off	3/26/2019 3:15 PM	Jessica Carter	2 Training
LKP Assignment (Copy)	97	Standard	Processed		3/6/2019 8:42 AM	Lindsey Pauley	1 Training
LKP Assignment	96	Dynamic	Active	On	1/31/2019 12:05 PM	Lindsey Pauley	1 Training

## SEARCH & FILTER

The Search, Filter, and Sort let you easily find previously created Learning Assignments on the Manage Assignment Page. The Learning Assignment cards display the Assignment Title, Assignment ID, Type, Status, Created Date, Created By, Description, Recurrence (Dynamic Assignments only) and Number of Trainings. The Assignment ID is unique for each Assignment and is automatically created when Assignments are submitted.

The Search Box lets you search by Assignment Title or Assignment ID.

Selecting the Filter button expands your options to let you easily perform an advanced search. The Filter Options available are: Training Title, Created By, Created Date, Type, Status, Recurrence, Course Code (if enabled), and User Criteria. The Created Date filter has a dropdown that lets you choose from thirteen pre-defined date ranges, or date fields where you can input a custom date range.

The Sort options let you easily sort the Assignments by the Created Date, Assignment Title, or who it was Created By.

## ASSIGNMENT OPTIONS

The Assignment Options dropdown will vary based on the status of the Assignment. If the Assignment is in a Draft status, you're able to Resume Draft. If the Assignment has been submitted, you're able to View Summary or Cancel. The View Summary option re-directs you to the Assignment Summary page which provides a look into the Training Progress, Assignment Settings, and more. Please note the Cancel option is only available for Standard Assignments that are in a Queued status.

When Copy is selected, the below settings will not be copied over in the new assignment:

- User Criteria
- Assignment ID
- Force Initial Assignment checkbox "Only include users in the
- 'Completed' status"
- Dynamic Reassignment – Respects value set on Assignment Tool Preferences page
- Upgrade to latest Version – Respects value set on Assignment Tool Preferences page
- Prerequisite Options – Respects default value set on the Assignment Tool Preferences page

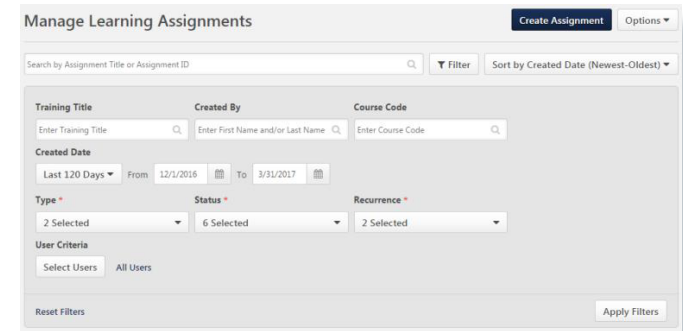


Figure 3. Search and Filter options

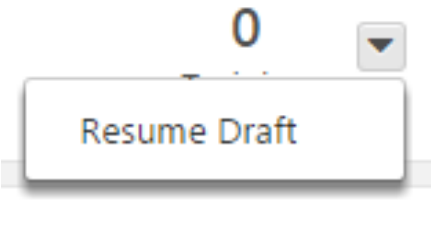


Figure 4. Draft Assignment Options

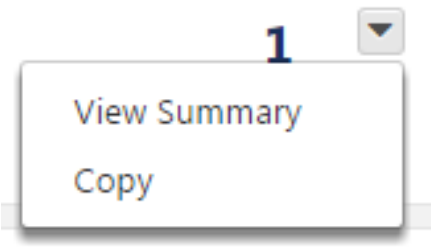


Figure 5. Published Assignment Options

## VIEW USER CRITERIA & TRAINING

When you click on the User Criteria link, a fly-out appears displaying the User Criteria set at the time of Assignment. When you click on the training number for the Assignment, a fly-out appears displaying the training associated with the Assignment. If you click on the training title, a separate browser window opens with a view of the Training Details page.

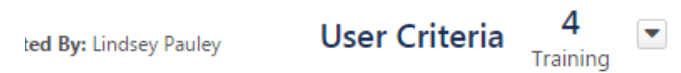


Figure 6. User Criteria and Training options

## CERTIFICATION AND VOLUNTEER ENROLLMENTS

Certification Proxy Enrollments and Volunteer Proxy Enrollments are not included with the Learning Assignment Tool redesign. You can continue to create Certification and Volunteer Enrollments by selecting the Options dropdown. From there, you're redirected to the existing pages. If you don't have one or both features, then the link will not be visible in the dropdown. If an Administrator does not have sufficient permissions to view them, the dropdown will be completely hidden. You can also create a navigation link via Navigation Tabs & Links for Certification Enrollments.

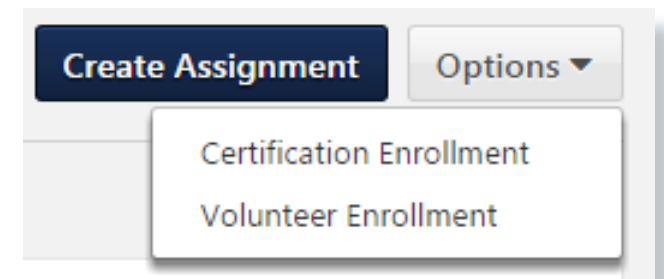


Figure 7. LAT Options dropdown

## ASSIGNMENT SUMMARY PAGE

From the Assignment Summary Page, you can see a high-level view of the Assignment or dive into the details. The page provides one centralized place to easily review how many users are assigned the training, the Training Progress Transcript History details for each user, the Assignment Settings, and more.

The data tiles provide a snapshot of the assignment and user's progress, as well as options related to the assignment type.

The Training Progress donut chart provides a high-level view of the progress of users in the Assignment. The legend includes data for four statuses: Not Started, In Progress, Completed, and Other. When the Assignment has multiple training items you can view the progress for All Training, which is the progress for the overall Assignment, or you can click the dropdown to filter the donut chart to show the progress of a specific training item.

The **Transcript History** provides a detailed view of the Users and their individual Training Progress. You're able to see an audit view of how and when the training was assigned, a view of the status of the training, and when it was completed. If a user has a training with more than one occurrence, you can click the number to open a fly-out to view the history of each occurrence, instead of navigating away to the users Transcript Details page. You can easily search for a specific user, and filter by training title and status. You can export the Transcript History to Excel using the Export Option in the dropdown on the top-right side of the section. There's a limit of 2,000 users in the export. Pro tip: You can filter by the different Training Title and Statuses to export them individually.

The screenshot displays the 'Assignment Summary' page for 'HR Annual Compliance Training'. The page is titled 'Annual compliance training for the HR division.' and shows the assignment ID as 125, created on 5/25/2019 at 4:32 PM by Cameron Usher.

Key metrics and settings are shown in data tiles:

- Dynamic Type:** On
- Assigned Users:** 3
- Training Progress:** 18 Total (12 Not Started, 6 In Progress, 0 Completed, 0 Other)
- Removal Settings:** Dynamic Removal (On), Remove In Progress Training (Off), Remove Child LOs (Off)
- Re-assignment Settings:** Dynamic Re-assignment (On), Re-assign Latest Version (Off)

The **Assignment Settings** section includes:

- Setup:** 6 Training
- Options:** Type: Dynamic, Training Assignment Workflow: Assigned and Approved, Email: Training Specific Emails
- Schedule:** Processing Start Date: As soon as Assignment is submitted, Due Date: 5 Day(s) from Date Assigned
- Users:** Assign New Occurrence: Off

The **Transcript History** section shows a list of training items for user Adam Bird (Organizational Units: Internal Teams (Division), Regional Sales Manager (Position)). The list includes training titles, versions, statuses, assigned dates, completed dates, and occurrence counts:

Training Title	Version	Status	Assigned By	Assigned Date	Completed Date	Occurrences
Emergency Preparedness	4.0	In Progress (In Progress)	Learning Assignment Tool (125)	7/16/2019 4:33 PM	N/A	13
IT Data Security Control 1.0	1.0	Not Started (Registered)	Learning Assignment Tool (125)	7/16/2019 4:33 PM	N/A	13
Leader Safety	5.0	Not Started (Approved)	Learning Assignment Tool (125)	7/16/2019 4:33 PM	N/A	13
New Hire Orientation Curriculum	5.0	In Progress (In Progress)	Learning Assignment Tool (125)	7/20/2019 4:33 PM	N/A	14
The Learning Assignment Tool	2.0	Not Started (Registered)	Learning Assignment Tool (125)	7/16/2019 4:33 PM	N/A	13
Workplace Safety	1.0	Not Started (Registered)	Learning Assignment Tool (125)	7/16/2019 4:33 PM	N/A	13

The **Modification History** section shows 14 modifications.

Figure 8. Assignment Summary Page

## ASSIGNMENT SUMMARY PAGE (continued)

### STANDARD ASSIGNMENTS

The Data tile for standard assignments will display:

- # of Training Items
- # of Users Assigned
- Assignment Type (Standard)
- Assignment Status

Users who did not meet the criteria for transcript removal will only receive the **Removed From Assignment** label.

The Assignment Status tile will inform you if the assignment is Queued or if it has been Processed.

If Queued, the tile will have the option to **Stop Processing**, which will keep the assignment from assigning to learners.

If Processed, the tile will have the option to **Remove from Transcript**. Selecting this button will begin the process of removing training from all assigned learners' transcripts at once. By default, training In Progress and Child LOs will be removed. If learners were assigned or requested the training separately, the training may not be removed from their transcript.

Users who successfully have the training removed from their transcripts will have **Removed from Transcript** and **Removed From Assignment** labels in the Transcript History section.

- When a learner is assigned training and associated with the same training across multiple assignments, the location of the Removed From Assignment tag on the assignment summary page is located to the right of the learner's name. If that learner was assigned that same training and associated with another assignment, and the learner was removed from that other assignment, this tag appears in the Occurrence flyout (opened by selecting the Occurrence number) and is displayed at the occurrence level.

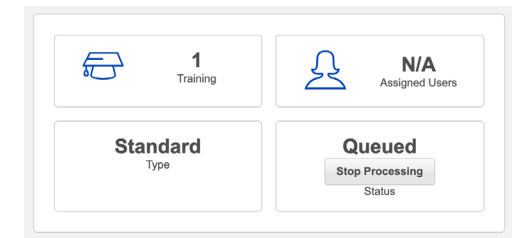


Figure 9. Data Tiles for a Queued Standard assignment

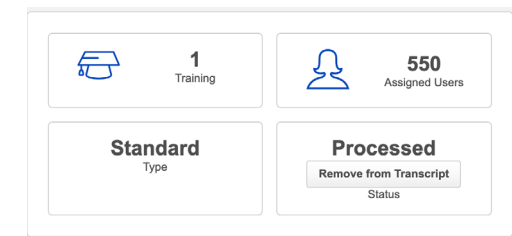


Figure 10. Data Tiles for a Processed Standard assignment

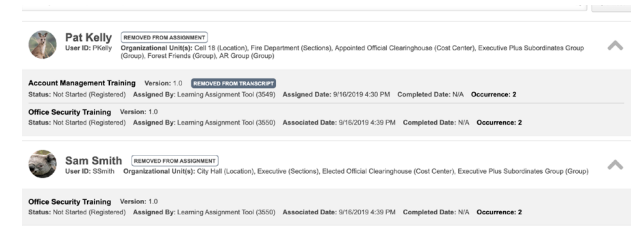


Figure 11. Remove Users

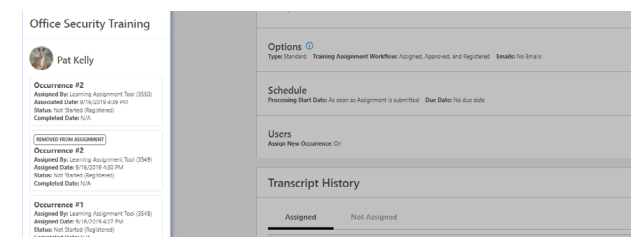


Figure 12. Occurrence Flyout



## ASSIGNMENT SUMMARY PAGE (continued)

### DYNAMIC ASSIGNMENTS

The Data tile for dynamic assignments will display:

- # of Training Items
- # of Users Assigned
- Assignment Type (Dynamic)
- Recurrence (On/Off)

The number of assigned users will go up and down as users fall in and out of User Criteria.

Dynamic Assignments also include two additional tiles not found for Standard Assignments:

- **Removal Settings:** Turn On/Off the Dynamic Removal options. When this is turned off, users that no longer meet the User Criteria will not be removed from the Assignment and the training will remain on their Transcript. The two sub-options, Remove In Progress Training and Remove Training within Curricula are also available. The default settings for these options are set on the Assignment Tool Preferences page.
  - An additional option to **Force removal from Assignment/Transcript** is also available, if the assignment is Inactive. This option works in the same fashion as a dynamic removal.
- **Re-Assignment Settings:** Turn On/Off the Dynamic Re-Assignment options. When this is turned off, users that were previously Dynamically Removed from the Assignment because they no longer meet the User Criteria will not be re-assigned the training and included back in the Assignment if they later meet the User Criteria again. When Re-assign Latest Version is turned off, users who are dynamically re-assigned because they meet the User Criteria again will not get the latest version of the training if it was re-versioned between the time they were dynamically removed and dynamically re-assigned. The default settings for these options are set on the Assignment Tool Preferences page.

If Dynamic Removal, Dynamic Re-assignment, and Re-assign Latest Version are enabled, any user that was removed from the learning and then returned to the assignment criteria at a future date will receive the latest version of the learning, even if the learning has been completed.

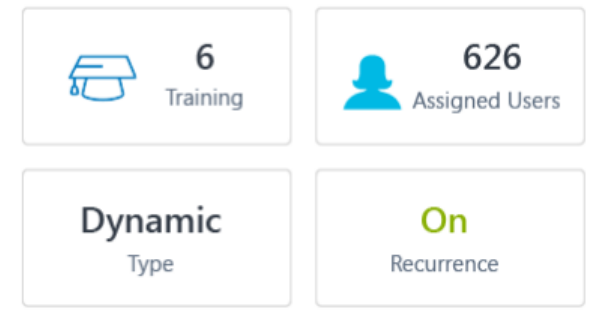


Figure 13. Data Tiles for a Dynamic assignment

Figure 14. Dynamic Removal Settings

Figure 15. Dynamic Re-assignment Settings

## CREATING AN ASSIGNMENT

The left-side navigation lets you see your progress and the section you're currently on. After completing a section, the previous section fills to let you know it's been completed. You can easily click between sections that you've completed. Select the call-outs below to learn more about the steps involved with assigning training.

### Create Assignment

- Setup
- Options
- Schedule
- Users
- Confirm

**SETUP**

**OPTIONS**

**SCHEDULE**

**USERS**

**CONFIRM**

#### Assignment Type

Which Assignment Type would you like to create?

Standard (process one-time only)

Dynamic (process continuously or periodically)

#### General Information

**Assignment Title**

i.e. Annual Compliance Training

**Assignment Description**


i.e. Annual compliance training for HR Division.

#### Training Selection

Select the training for this Assignment

Select Training

**Selected Training**

 No training selected yet.

## SETUP

The Setup tab is the first page of the create workflow. On this page you'll configure general information such as the Assignment Type, Assignment Title, Description, and Training Selections.

### ASSIGNMENT TYPE

This section lets you choose between a Standard or Dynamic Assignment. A Standard Assignment only processes one-time and a Dynamic Assignment processes daily at the time the assignment was created, so the training is assigned to users that newly meet the User Criteria. so the training is assigned to users that newly meet the User Criteria. Standard will always be selected as the default.

### TITLE & DESCRIPTION

The Assignment Title lets you create a custom title that all the training you select will be grouped under once it's submitted, making it easier for you to manage and track. For example, if you're assigning out three trainings for compliance purposes, you could name the assignment, Compliance 2017. Each training would be on the users Transcripts as a standalone item, but they would be grouped together under the title for you on the Manage Assignments page. An Assignment Title is always required, while the Description is optional.

When you have your Assignment Title and Description added, click on the Select Training button. When clicked, a fly-out opens from the left side of the screen which lets you search and select which training you would like to assign. You can search by Training Title using the search box. Additional filters are automatically expanded. The available filter options include: Training Type, Course Code (if enabled), Provider, Language, Locator Number, Location, and Training Description. To add training, simply select the checkbox next to the training(s). As you select training, the Selected tab at the top of the page will update accordingly. Once your training is selected, you may click the Selected tab to review your selections or click the Select button at the bottom of the fly-out to add them to the Assignment.

### TRAINING PURPOSE & COMMENTS

Once the training is selected, two new fields will appear below the training: Training Purpose and Comments. Training Purpose will only display when one training item that has a Training Purpose configured is selected. If the training item only has one Training Purpose associated, the Training Purpose is automatically selected in read-only text. If the training has one or more Training Purposes associated, you must select the Training Purpose from the drop down. The Add comment to appear in the Audit History and Transcript History for each training is optional to input. This lets you input comments that will appear in the users Transcript History on the Training Details page. If multiple trainings are selected, the comment will apply to each training.

Figure 16. Setup

Figure 17. Select Training flyout

## SETUP (continued)

### WARNING MESSAGES

A warning message will appear as an orange banner above the Training Selection section if any of the training items have associated Pre-work, Post-work, Pre-requisites, is an equivalent to another selected training, or if a Session was selected that occurs in the past. Orange clickable text that reads, View Warning will appear on each training card that has any of the above criteria. Clicking the View Warning text brings up a pop-up window with the details of the warning. When you're ready to proceed, click Next.

### KEY CONSIDERATIONS OF THE SETUP TAB

- If administrators have the Assignment Tool – Restrict to Users LO Availability permission constrained, the training available to them will respect any constraints applied.
- Events that display in the training search results with a ">" symbol indicate that Sessions are associated.
- When searching by Locator Number, Sessions will be returned in a flat list, compared to the existing Proxy Enrollment where they were listed as a hierarchy.

## OPTIONS

The Options tab lets you configure various settings such as the Dynamic Removal, Training Assignment Workflow, and Email Settings.

### DYNAMIC REMOVAL

If the Dynamic Assignment Type is selected on the Setup page the Dynamic Removal option will appear on the Options page. Dynamic Removal, which automatically removes training in certain statuses from users' Transcripts if they no longer meet the User Criteria, can be enabled or disabled after you have submitted the assignment. However, when enabled within the create workflow, two advanced removal options will appear. The first advanced option, Remove In Progress training, means training that's currently In Progress on the user's Transcript will be included in the removal.

The second advanced option, Remove training within Curricula, means that all Training within the Curriculum will be included in the removal. This option is only available if a Curriculum is part of the Assignment. These advanced options cannot be configured after the Assignment has been submitted.

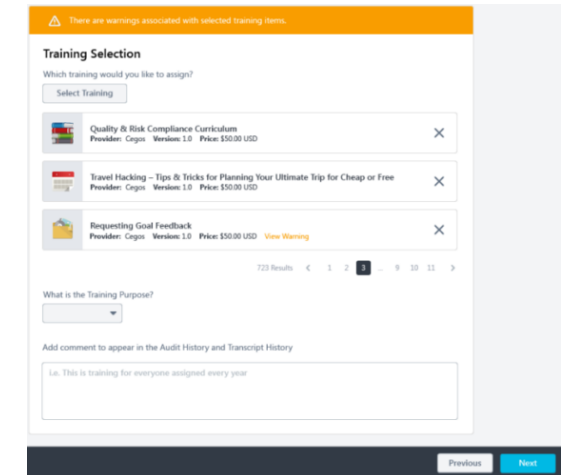


Figure 18. Selected Training with a View Warning message

## Dynamic Removal

Enable Dynamic Removal if you would like users to be removed

- Enable Dynamic Removal
- Remove in progress training
- Remove training within Curricula

Figure 19. Assignment Type options

## OPTIONS (continued)

### TRAINING ASSIGNMENT WORKFLOW

The Training Assignment Workflow defines how the training will be assigned to users. Your selection will impact what the status of the training will be on users' Transcripts and may override any availability or approval workflows configured at the training level within the Course Catalog.

- **Assigned only:** Adds the training to the user's Transcript. The user will still need to have the training approved (if approvals are required). The user may still have to select the Register link on their Transcript to launch the training after the training has been approved.
- **Assigned and Approved:** Adds the training to the user's Transcript and may override any approvals. The user may still have to select the Register link on their Transcript to launch the training after the training has been approved.
- **Assigned, Approved, and Registered:** Adds the training to the user's Transcript, may override any approvals, and directly registers the user into the training. The user can launch the training without taking an additional action unless they have to complete a payment.
- **Bypass User Payment:** Adds the training to the user's Transcript, may override any approvals, directly registers the user into the training, and the user will not be prompted for a payment. This option will only appear if Registered is selected.

### PREREQUISITE OPTIONS

The Enforce Prerequisite option determines if users should still receive the assignment if they have not yet satisfied the prerequisites for the associated training. For example, an organization might not want users to receive a training if they have not yet completed the prerequisites. When enabled, users not satisfying training prerequisites will not receive the training in the assignment. When disabled, users not satisfying training prerequisites will receive the training in the assignment.

Administrators can set the default value of the toggle via the Assignment Tool Preferences page (Admin > Tools > Learning > Learning Preferences > Assignment Tool Preferences).

### Training Assignment Workflow

Which status should the training be in on users' transcript upon enrollment?

- Assigned  
 Approved  
 Registered  
 x Bypass User Payment

Figure 20. Training Assignment Workflow options

### Prerequisite Options

Set the prerequisite preferences for this Learning Assignment.

- Enforce prerequisites. When enabled, users not satisfying training prerequisites will not receive the associated training.

Figure 21. Prerequisite Options

## OPTIONS (continued)

### EMAIL SETTINGS

This section lets you define what emails will be sent to users included in the Assignment. There are four email options to choose from: Training Specific Emails (selected by default), Custom Emails, Ad-Hoc Emails, or No Emails. Each Email Setting selected will contain a warning message across the top of the section, warning that changes can/cannot be applied after the Assignment is submitted. The warnings will differ based on Standard and Dynamic Assignments.

- Training Specific Emails:** This option sends emails to users based on the email settings configured at the training level. For example, if the LO selected has System Default emails configured at the training level, any active System Default emails will trigger for that training. When this option is selected, two additional options will also appear: Send Assign Training Emails and Send Register Training Emails. These options let you decide if the active Assign Training and Register Training emails should be triggered. Please note if the Assignment Type is Dynamic, any changes made to the email settings configured at the training level will apply to future assignments.
- Custom Emails:** This option lets you send custom emails to users for the assignment. Selecting the Set Custom Emails link brings up a new pop-up to configure the Custom Emails. You'll be able to review Custom Emails after submission on the Assignment Summary Page.
- Ad-Hoc Emails:** This option lets you send an Ad-Hoc email to users each time the assignment processes. This suppresses all emails configured at the training level. Selecting the Set Ad-Hoc Email link brings up a new pop-up to configure the Ad-Hoc Email.
- No Emails:** This option will not send any emails to users included in the Assignment. This suppresses all emails configured at the training level. Please note this does not control emails for any associated Pre-requisites, Pre-work, Post-work, or training within a container (i.e. Curriculum).
- Emails and Curricula:** If the assignment includes one or more Curriculum, then the option Curricula with Auto-Registration will appear. This option lets you suppress Register Training emails that are configured for the training within the Curriculum that is set to Auto-Register upon registration of the Curriculum. It will be toggled OFF by default. Please note this option does not apply to training that is set to Auto-Register upon completion of the preceding training.

Figure 22. Email Settings selections

Figure 23. The Ad-Hoc Email Setup

## KEY CONSIDERATIONS OF OPTIONS TAB:

- If a user only has the Assignment Tool – Standard permission, the Dynamic option for the Assignment Type will be hidden.
- If a user doesn't have the Assignment Tool - Bypass User Payment permission, the option, Training Assignment Workflow > Bypass User Payment option will be hidden.
- If a Session with a date in the past is added to the Training Selection, the option, Training Assignment Workflow > Completed will be available, which allows you to add it to a user's Transcript in a Completed status.
- There are two permissions related specifically to Email Settings.
  - Assignment Tool – Email Settings - View
  - Assignment Tool – Email Settings - Manage
- Users are not required to have either email-related permission to create an Assignment. If the user does not have one of the permissions, the following is available:
  - Training Specific Emails is selected by default and cannot be changed
  - Send Assign Training emails cannot be changed and is OFF by default. Assign Training emails will not be sent.
  - Send Register Training emails cannot be changed. The default value is based on a back-end setting.
- If a Cohort or a Session is included in the assignment, Custom Emails will not be available.
- Please note emails will send for each training within the Assignment. For example, if you are creating an Assignment with 5 trainings, 5 separate emails will be sent.
- When **Save Draft** is selected and you Resume Draft, the Prerequisite Options will default to the option configured in Assignment Tool Preferences.

The screenshot shows the 'Options' tab of the 'Training Assignment Workflow' configuration. The interface includes a sidebar with navigation options: Setup (selected), Options, Schedule, Users, and Confirm. The main content area is divided into three sections:

- Training Assignment Workflow:** A section titled 'How would you like the training to be assigned to users? Your selection will impact what status the training will be in on users transcripts.' It contains three radio button options: 'Assigned only' (selected), 'Assigned and Approved', and 'Assigned, Approved, and Registered'.
- Prerequisite Options:** A section titled 'Set the prerequisite preferences for this Learning Assignment.' It features a checkbox labeled 'Enforce prerequisites. When enabled, users not satisfying training prerequisites will not receive the associated training.' The checkbox is currently checked.
- Email Settings:** A section titled 'What email settings would you like to apply to this Assignment?' It contains a blue warning banner stating 'No changes can be made to these email settings after the Assignment is submitted.' Below this, there are four radio button options: 'Training Specific Emails' (selected), 'Custom Emails', 'Ad-Hoc Email', and 'No Emails'. Under 'Training Specific Emails', there are two checkboxes: 'Send Assign Training emails' and 'Send Register Training emails', both of which are unchecked.

At the bottom of the form, there are buttons for 'Cancel', 'Save Draft', 'Previous', and 'Next'.

## SCHEDULE

The Schedule tab lets you configure the Processing Frequency, Processing Start Date, Training Start Date, Training Due Date, and Recurrence. The options available will differ between a Standard and Dynamic Enrollment. The below section is broken down by Standard and Dynamic Assignments.

### STANDARD ASSIGNMENTS

**Processing Start Date:** The Processing Start Date lets you configure the date and time the Assignment will start to process and assign the training to users. Two options are available:

- As soon as Assignment is submitted: When selected, the Assignment will start to process immediately once it's submitted.
- Specific Date: When selected, you're able to set a specific date and time for the Assignment to start processing. The Assignment will be in the Queued status until that date and time.

**Training Start Date:** The Training Start Date lets you configure when users can begin to take the training. This option is only available for Standard Assignment types. Two options are available:

- As soon as the training is assigned: When selected, the user will be able to access and begin to take the training as soon as it appears on their Transcript.
- Specific Date: When selected, the training will appear on the users Transcript as soon as the Assignment is processed, but the training will not be accessible to take until the specified date.

**Training Due Date:** The Training Due Date lets you configure when the training will be due. Three options are available:

- No due date: When selected, the training will not have a due date.
- Relative Date: When selected, the Relative Options appear, and the training is due based on the Relative Option selected.
- Specific Date: When selected, the training is due on the specific date set.

The screenshot shows the 'Create Assignment' form with the 'Schedule' tab selected. It contains three sections for configuring dates:

- Processing Start Date:** Question: "When would you like the assignment to start processing and assign the training to users?" Options:  As soon as Assignment is submitted,  Specific date.
- Training Start Date:** Question: "When would you like users to be able to start the training?" Options:  As soon as the training is assigned,  Specific date.
- Training Due Date:** Question: "When would you like the training to be due?" Options:  No due date,  Relative date,  Specific date.

Figure 24. Schedule

### Processing Start Date

When would you like the assignment to start processing and assign the training to users?

- As soon as Assignment is submitted
- Specific date

2/2/2017 at 8:00 AM

Figure 25. Processing Start Date

### Training Start Date

When would you like users to be able to start the training?

- As soon as the training is assigned
- Specific date

3/16/2017

Figure 26. Training Start Date



## SCHEDULE (continued)

### DYNAMIC ASSIGNMENTS

**Processing Frequency:** This lets you configure how frequently the Assignment will process and assign the training to users that newly meet the selected User Criteria for the Assignment. Two options are available:

- **Daily:** When selected, the Assignment will process each day based on the date and time configured in the Processing Start Date.
- **Annually:** When selected, the Assignment will process one time each year according to the date and time configured in the Processing Start Date.

**Processing Start Date:** This lets you configure the date and time the assignment will start to process and assign training to users who meet the User Criteria. Every time the assignment processes in the future, the time of day it processes will be based on your selection in this section. If Daily is selected for the Processing Frequency, three options are available:

- **As soon as Assignment is submitted:** When selected, the Assignment will process immediately once it's submitted. When the Assignment processes each day to add new users, it will be according to the time of day the Assignment was submitted
- **As soon as Assignment is submitted, but assign the training relative to:** When selected, the Assignment will process once it's submitted. However, users who meet the User Criteria will not see the training on their Transcript until they have met the defined Relative Criteria. When the Assignment processes each day to add new users, it will be according to the time configured in this option.
- **Specific Date:** When selected, the Assignment will process on the specific date and time selected. When the Assignment processes each day to add new users, it will be according to the time configured in this option

**Processing End Date:** This lets you configure the date the dynamic assignment will stop assigning training to users who meet the User Criteria. Two options are available:

- **No end date:** This is the default setting for the dynamic assignment, if selected the assignment will not discontinue assignment automatically.
- **Specific Date:** When selected, the Assignment will stop processing on the specific date and time selected. On the designated end date no processing will occur.

**Training Due Date:** This lets you configure when the training is due.

- **No due date:** When selected, the training will not have a due date.
- **Relative date:** When selected, the Relative Options appear, and the training is due based on the Relative Option selected.
- **Annual Date:** When selected, the training is due on the month and day set for all users who receive the training.

The screenshot shows three stacked configuration panels. The top panel, 'Processing Frequency', has radio buttons for 'Daily' (selected) and 'Annually'. The middle panel, 'Processing Start Date', has radio buttons for 'As soon as Assignment is submitted' (selected), 'As soon as Assignment is submitted, but assign the training relative to', and 'Specific Date'. The bottom panel, 'Processing End Date', has radio buttons for 'No end date' and 'Specific Date' (selected). Below the 'Specific Date' option, there is a date input field showing '8/22/2020' and a time dropdown menu showing '12:00 AM'.

Figure 27. Processing Frequency, Start Date, and End Date

### Training Due Date

When would you like the training to be due?

The screenshot shows the 'Training Due Date' configuration interface. It has radio buttons for 'No due date', 'Relative date' (selected), and 'Annual date'. Below the 'Relative date' option, there is a numeric input field with '1', a dropdown menu with 'Month(s)', and a 'from' label followed by a dropdown menu with 'Date Ass...'. A dropdown menu is open, showing options: 'Date of Birth', 'Transfer Date', 'Date Assigned' (checked), and 'Hire Date'. Below this, the 'Recurrence' section is partially visible.

Figure 28. Training Due Date

## SCHEDULE: DYNAMIC ASSIGNMENTS (continued)

**Recurrence:** This step is optional. Recurrence is used if the training should occur more than once for users who meet the Assignments User Criteria. When the option is enabled, the following options are available:

- **When would you like the training to recur:** This lets you configure the date and/or criteria that will trigger the recurrence.
  - **Relative Date:** When selected, you can have the training recur based on Relative Options. A sub-option appears that lets you choose to only recur if the previous occurrence was completed. For example, if a user didn't complete the previous Assignment, they would not be assigned the training again until it was completed.
  - **Annually:** This lets you set an annual date for the training to recur.
- **When would you like the training recurrence to end:** This lets configure when the training recurrence should stop.
  - **Never:** This lets you keep the recurrence running with no end date.
  - **Specific Date:** This lets you set a specific date for the recurrence to end.
  - **Once a user has a specific number of occurrences on their Transcript:** This lets you set a number that will stop the recurrence after a users has been re-assigned the training a specific number of times. For example, if you input 2 in the field, the user would stop being re-assigned the Assignment after they have two occurrences on their Transcript.

### Key Considerations of Schedule Tab.

- The Training Start Date option will not appear if the user does not have the Assignment Tool -Training Start Date permission.
- The Recurrence options will not appear if the administrator does not have the Assignment Tool –Standard and Dynamic - Recurrence permission.
- Administrators must have the Assignment Tool – Processing Start Time permission to be able to see and configure the Processing Start Date. If they don't have the permission, the Assignment will process at the default time, 12:00 AM.
- If a Material LO is part of the Assignment with On the Job Training enabled, the Training Start Date option will not appear.
- If a Session LO is part of the Assignment, the Recurrence options are hidden.
- If a Curriculum LO is part of the Assignment and does not allow recurrence, the Recurrence options are hidden.

## Recurrence

Would you like this training to occur for users more than once?

Enable Recurrence

When would you like the training to recur?

Relative date

Annually

Dec ▼

21 ▼

When would you like the training recurrence to end?

Never

Specific date

Specific number of occurrences on user's transcript

occurrences

Figure 29. Recurrence options

## USERS

### USER CRITERIA/ USER UPLOAD

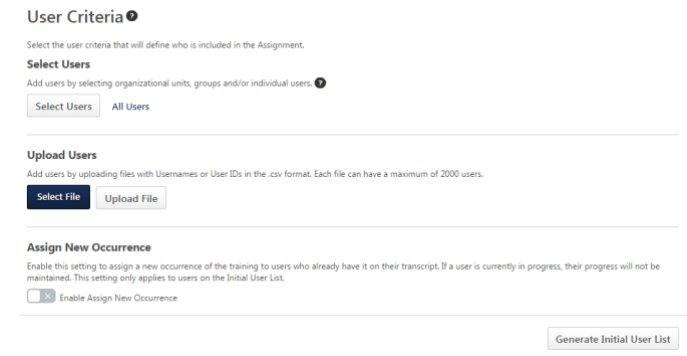
The Users tab lets you select the User Criteria that will define which specific OU/Users will be included within the Assignment. You're able to select multiple Users, OUs and/or upload multiple CSV files. You can easily add all users in the portal at one time using the All Users link. When the Select Users button is selected, a fly-out appears letting you easily search and filter for specific OU/Users. The maximum number of users that can be added in a CSV file is 2,000. Anything over 2,000 will be ignored; however, you may upload additional CSV files if you have more than 2,000 users you wish to upload.

### ASSIGN NEW OCCURRENCE

The Assign New Occurrence option lets you assign a new occurrence of the training to users who are a part of the User Criteria but already have the training on their Transcript. The Assign New Occurrence option will assign the training to users included in the Initial User List and any users who enter the Dynamic Assignment availability at a later date.

Curriculum reassignment will provide users with the latest version of all child training contained within the curriculum. This behavior is applicable to assignments with the 'Maintain Progress' feature or when dynamic reassignment is enabled. When a curriculum child training item that was previously assigned to a user via a learning assignment is reassigned via the same assignment or via another learning assignment, the user receives the latest version of the child training item, instead of the old version. The status of the training in the user's transcript will depend on the setup at the training level (equivalency, prework, approval workflow ...).

Note: This behavior also applies to Curriculum, Materials and Online Courses versioning or user re-request.



**User Criteria**

Select the user criteria that will define who is included in the Assignment.

**Select Users**  
Add users by selecting organizational units, groups and/or individual users.

Select Users All Users

**Upload Users**  
Add users by uploading files with Usernames or User IDs in the .csv format. Each file can have a maximum of 2000 users.

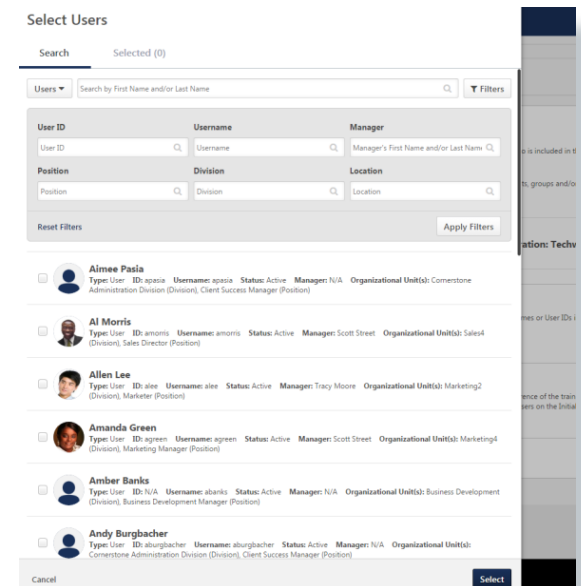
Select File Upload File

**Assign New Occurrence**  
Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained. This setting only applies to users on the Initial User List.

Enable Assign New Occurrence

Generate Initial User List

Figure 30. User Criteria



**Select Users**

Search Selected (0)

Users Search by First Name and/or Last Name Filters

User ID	Username	Manager
<input type="text"/>	<input type="text"/>	<input type="text"/>
Position	Division	Location
<input type="text"/>	<input type="text"/>	<input type="text"/>

Reset Filters Apply Filters

- Aimee Pasia**  
Type: User ID: apasia Username: apasia Status: Active Manager: N/A Organizational Unit(s): Cornerstone Administration Division (Division), Client Success Manager (Position)
- Al Morris**  
Type: User ID: amorris Username: amorris Status: Active Manager: Scott Street Organizational Unit(s): Sales4 (Division), Sales Director (Position)
- Allen Lee**  
Type: User ID: alee Username: alee Status: Active Manager: Tracy Moore Organizational Unit(s): Marketing2 (Division), Marketer (Position)
- Amanda Green**  
Type: User ID: agreen Username: agreen Status: Active Manager: Scott Street Organizational Unit(s): Marketing4 (Division), Marketing Manager (Position)
- Amber Banks**  
Type: User ID: N/A Username: abanks Status: Active Manager: N/A Organizational Unit(s): Business Development (Division), Business Development Manager (Position)
- Andy Burgbacher**  
Type: User ID: aburgbacher Username: aburgbacher Status: Active Manager: N/A Organizational Unit(s): Cornerstone Administration Division (Division), Client Success Manager (Position)

Cancel Select

Figure 31. Select Users flyout

## USERS (continued)

When Enable Assign New Occurrence is selected, three sub-options will appear:

- **Only assign new occurrence to users in the 'Completed' status:** Lets you only re-assign the training to those users who have Completed the training.
- **Maintain Transcript Progress:** Lets users "Maintain Progress" for the same version/same training when "Assign New Occurrence" is selected.
- **If applicable, override all prior due dates for trainings contained in this assignment:** Lets you set the due date for all training on a user's transcript to the due date set for the assignment.

By default, if a user receives multiple registrations for the same training, the system will respect the minimum due date of all registrations.

Example of this feature in use: Leigh assigns John Security 101, part of a Curriculum, using Assignment 100 due September 1st. Several months later, Leigh again assigns John Security 101 as a Stand Alone training due November 1st. Because John has not yet completed the training, and because Leigh desires a new Due Date, Leigh selects this feature in her new Assignment 200. If Leigh did not select this feature, the system would by default respect the minimum due date (September 1st).

### Assign New Occurrence

Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained. This setting only applies to users on the Initial User List.

- Enable Assign New Occurrence
- Only assign new occurrence to users in the 'Completed' status
- Maintain Progress
- If applicable, override all prior due dates for trainings contained in this assignment.

Figure 32. Assign New Occurrence options



Scenarios where the **Override Due Date** feature is expected to apply

- When training is present on the user's Transcript as a Stand Alone training or is nested within a Parent and this option is selected, the Due Date for the individual training will be overridden to the date defined in your assignment. If this feature is not selected, the earliest Due Date of all registrations of the training for the user will still apply.



Scenarios where the Override Due Date feature is **not** expected to apply

- When training is not already on the user's Transcript and the Override Due Date feature is selected or not selected, the Due Date used will be the one defined on the Schedule Tab when creating the Assignment. The Override Due Date feature is not applicable in this scenario because nothing is being overridden.
- When training is already on the user's Transcript as a Stand Alone item or is nested within a Parent, and Assign New Occurrence is not selected, the training will not be altered.

## USERS (continued)

To see a detailed list of users who will be assigned the training, click the Generate Initial User List button. When this is clicked, all the initial users that meet the criteria defined in the User Criteria section will be listed below with the trainings they're being assigned. If the training is already on the users Transcript, the Occurrence field will indicate how many times they've previously been assigned the training.

## CONFIRM

The Confirm tab is the last page of the Assignment creation and is where you can review the settings you've selected prior to submitting the Assignment. There are four sections within this page: Setup, Options, Schedule, and Users. All the sections are collapsed by default but can be expanded to see additional detail by using the arrow next to each section. The entire page is read-only, if edits need to be made, you can click the Previous button or use the tabs in the navigation to go back to the page you want to make edits for. When submitting the Assignment, two pop-ups can appear: High User Count and Insufficient Seats. The High User Count warning indicates how many users will be assigned the training. If the number of users being assigned the training is more than 20% of the total active users in your portal, a warning message appears asking if you want to continue. This threshold can be adjusted as needed from the Assignment Tool Preferences page. The Insufficient Seats warning appears when you're adding more users to the User Criteria than seats are available for a Session. You're able to increase the session seats through the warning message. Once you select Submit, you will be redirected to the Assignment Summary page and the Assignment will begin to process based on the configurations set.

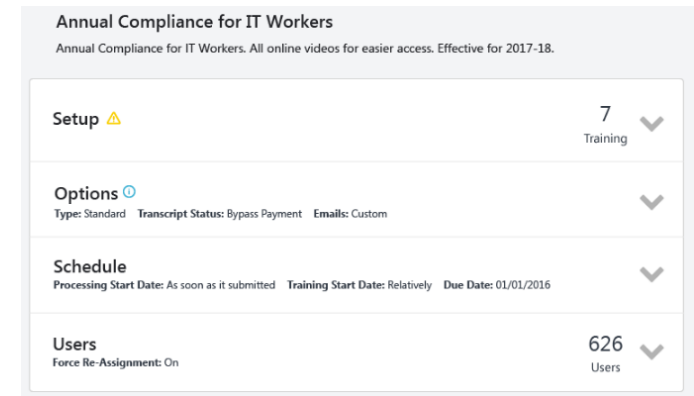


Figure 33. Confirm settings

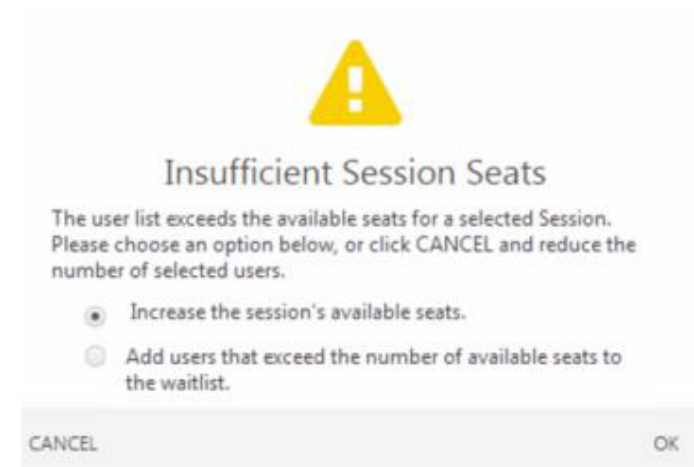


Figure 34. Insufficient Sessions Seats

## DYNAMIC OPTIONS

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### DYNAMIC REMOVAL

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The Dynamic Removal option for Learning Assignments can be enabled from the Options tab during the create workflow or from the Summary page after it's been submitted. When enabled, users who no longer meet the User Criteria will be automatically removed from the Assignment and the training will be moved to the Removed tab of their Transcript depending on what status it's in. In addition, Dynamic Removal includes two powerful sub-options. One option lets you remove training that's In Progress, and the other removes child LOs within a Curriculum. These two sub-options can be enabled or disabled after the assignment has been submitted from the Summary page.

If enabled, here's an example of how they would work: An Administrator created an Assignment, with Dynamic Removal and the two sub-options enabled, that included an Online Course, and a Curriculum that had two child LOs. User Jessica was included in the Assignment and began taking the Online Course and Curriculum. While she was in progress, she moved to a new Division and was Dynamically Removed from the Assignment. Since the Assignment had the sub-options enabled, both in-progress trainings would be moved to the Removed tab of her Transcript, including the child LOs within the Curriculum. Detailed information on what statuses will cause training to be moved to the removed tab of a user's Transcript or not is provided below.

Please note if the training is part of another active Curriculum OR it's in a Completed status, Dynamic Removal will not remove the training from a user's Transcript regardless of what sub-options are selected.

The below statuses are considered to be Not Started training statuses and will be moved to the Removed tab of users' Transcripts when Dynamic Removal is enabled:

- Pending Approval
- Pending Approval / Waitlisted
- Pending Approval / Past Due
- Pending Approval / Waitlisted / Past Due
- Approved
- Approved / Past Due
- Registration Pending
- Registration Pending / Past Due
- Registered
- Registered / Past Due
- Registered / Not Available
- Registered / Not Available / Past Due
- Pending Prerequisite
- Pending Prerequisite / Past Due
- Exception Requested
- Waitlisted
- Exception Requested / Waitlisted
- Withdrawn
- Exception Requested / Past Due
- Waitlisted / Past Due
- Exception Requested / Waitlisted / Past Due
- Withdrawn / Past Due
- Waitlist Expired
- Waitlist Expired / Past Due
- Not Started
- Not Started / Past Due
- Pending Prior Training
- Pending Payment
- Pending Pre-Work
- Pending Pre-Work / Past Due
- Pending Payment / Past Due
- Payment Denied
- Payment Denied / Past Due
- Payment Refunded
- Payment Refunded / Past Due
- Not Available
- No Show
- No Show / Past Due
- Denied
- Cancelled
- Denied / Past Due
- Cancelled / Past Due

**DYNAMIC REMOVAL (continued)**

The below statuses are considered to be In Progress training statuses and will be moved to the Removed tab of users' Transcripts when Dynamic Removal is on and the Remove In Progress option is enabled:

- In Progress
- In Progress / Past Due
- Incomplete
- Incomplete / Past Due
- Pending Completion Approval
- Pending Completion / Past Due
- Failed
- Failed / Past Due
- Pending Evaluation
- Pending Evaluation / Past Due
- Pending Acknowledgment
- Pending Acknowledgment / Past Due
- Past Due
- Pending Grade
- Pending Grade / Past Due
- Pending Post-Work
- Pending Post-Work/Past Due
- Completion Approval Denied
- Completion Approval Denied / Past Due
- Pending Completion Signature
- Pending Completion Signature /Past Due
- Pending SF-182 Form Approval
- SF-182 Form Denied
- Pending Observer Completion
- Pending Observer Completion / Past Due
- Pending Observer Completion / Not Available
- Pending Observer Completion / Not Available / Past Due
- Subscription Expired

The below training statuses are NEVER removed from the Transcript regardless of whether Remove In Progress training is enabled or disabled:

- Completed
- Equivalent
- Completed Equivalent
- Exempt-Internal
- Exempt
- Expired
- Discontinued
- Expired / Past Due
- Discontinued / Past Due
- Not Activated
- Old Version

## DYNAMIC RE-ASSIGNMENT

Dynamic Re-Assignment lets you set up Learning Assignments to automatically re-assign users training when they fall in and out of the User Criteria. For example, imagine you create a Dynamic Learning Assignment for the course, Product Management 101, and assign it to the Product Division, which includes the employee, Jessica. If Jessica starts the training and is In Progress, then decides to take a new position and transfer to the Marketing Division, the training would be removed from Jessica's Active Transcript (provided Dynamic Removal with the In Progress sub-option is enabled). If Jessica returned to the Product Division at a future date, she would be automatically re-assigned and the training, Product Management 101, would be restored to the Active tab of her Transcript. Her progress would be maintained but a new due date would be applied.

Dynamic Re-Assignment can be setup to be enabled or disabled by default when new Assignments are created from the Assignment Tool Preferences page. When the toggle is enabled (shown as green), Dynamic Re-Assignment will show as on/enabled on the Assignment Summary page for newly created Assignments. You're always able to enable/disable the Dynamic Re-Assignment setting from the Assignment Summary page regardless of what you selected in the Assignment Tool Preferences. If a user does not have the Assignment Tool – Dynamic Re-assignment permission, this toggle will be read-only.

The default setting for, Upgrade users to the latest version upon re-assignment option can also be selected on the Assignment Tool Preferences and Assignment Summary page. When this toggle is enabled, users will receive the latest version of the training when they are dynamically re-assigned, if one exists.

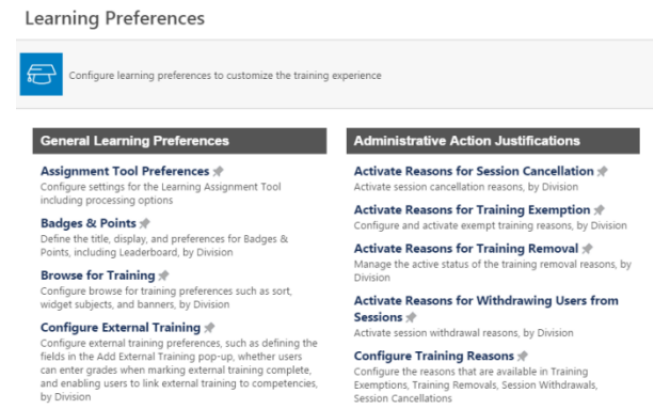


Figure 35. Learning Preferences page



Figure 36. Assignment Tool Preferences



## FAQs

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**Q: Am I able to edit Dynamic Learning Assignments?**

**A:** No, currently there is not a way to edit Dynamic Learning Assignments.

**Q: Am I able to batch enable the Dynamic Removal and Dynamic Re-Assignment options for my existing Dynamic Learning Assignments?**

**A:** Yes, you can request a batch update of these options for your existing Learning Assignments through a Global Product Support (GPS) case.

**Q: Am I able to enable the Dynamic Removal and Dynamic Re-Assignment options when creating a Learning Assignment?**

**A:** You can enable the Dynamic Removal options when creating a Learning Assignment. Dynamic Re-Assignment options can be enabled from the Assignment Summary page or can be set to be always enabled from the Assignment Tool Preferences page.

**Q: Is there a way to configure the threshold for the High User Count warning message when submitting an assignment?**

**A:** Yes, this can be configured from the Learning Assignment Tool Preferences page.

**Q: Will the Assignment ID be visible on the users Transcript?**

**A:** Yes, the Assignment ID will appear on the Transcript Details page under the Transcript History section.

**Q: Does a Dynamic Learning Assignment process multiple times a day as users meet the criteria?**

**A:** No, Dynamic Learning Assignments only process once a day, at the time the assignment was created. In order to capture new users in the assignment at multiple times a day, multiple dynamic assignments would need to be created at the different desired times.

## WHAT'S NEW WITH THE OCTOBER '21 RELEASE

### Save email settings in drafts

Prior to this enhancement, the Learning Assignment Tool (LAT) draft functionality allowed administrators to save an assignment they were configuring and return to it later, but the drafts did not save the emails set up within the assignment. They had to be reconfigured if they were not immediately submitted. After this enhancement, when a draft is re-opened for editing, any Custom or Ad-Hoc emails that were previously set up will still be there.