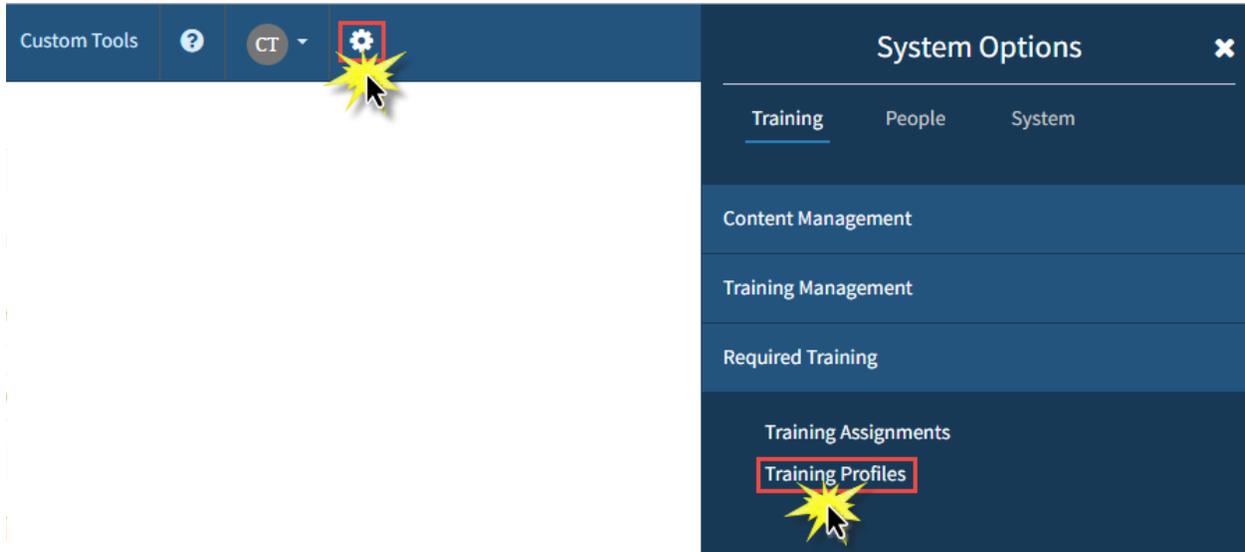


Assigning Required Training

This job aid provides you with the minimum steps you need to take in order to create a training profile and assign a required training. You must have an elevated role to perform this task, Course, Content or User Manager or Domain Administrator.

1. On the top menu bar *click* on **System** icon and a slide out menu to the right will appear. *Click* on **Required Training** and then on **Training Profiles**.



2. On the training profile screen, you have the option to create two types of training profiles:
 - Dynamic Date: The assignment due date is based on the date of another event in the system, such as assignment date or last completion date.
 - Fixed Date: The assignment due date is based on a specifically selected month, day, and possibly year.

Select the type of training profile you want to create by clicking on the drop-down and then *click Go*.

Assigning Required Training

Training Profiles

Create and manage training profiles. They are used when assigning required training to users.

Search

Simple Search | [Advanced Search](#)

To perform a search, enter keywords in the Search Text field. Then make selections using the search criteria options, and click Search. Use the Advanced Search link to enter more specific search criteria for your search.

Search Text Create New Dynamic Profile Go

Search Type

3. The first section you will need to type in the title of the profile, a description, and keywords.

[Edit Training Profile](#) Preview

Enter new or change existing summary information about the item and then click Create or Save. Note: After you create an item, the Select button displays below the list of locales. Then you can choose a locale, click Select, enter information for the selected locale, and click Save.

Profile Type Dynamic Date

* Profile

* Description

* Keywords

4. You can send up to 5 reminder emails (this is optional).

Assigning Required Training

Reminder Email Trigger	<input type="checkbox"/>	<input type="checkbox"/> ▼	Before Due Date	Preview Email
	<input type="checkbox"/>	<input type="checkbox"/> ▼	Before Due Date	
	<input type="checkbox"/>	<input type="checkbox"/> ▼	Before Due Date	
	<input type="checkbox"/>	<input type="checkbox"/> ▼	Before Due Date	
	<input type="checkbox"/>	<input type="checkbox"/> ▼	Before Due Date	

5. A training period is the time during which a learner must complete his or her required training. Each assigned learning content item may have a different training period, and if a required training assignment recurs, there will be multiple training periods for that assignment. If a learner fails to complete an assignment by the end of a training period, he or she receives an "incomplete" status for the assignment for that training period.

** You can allow completions after the due date by checking the appropriate box.**

Depending on the training profile you have selected, the starting date and time for the first training period can be based on:

- Assignment Date: The date and time you assigned the learner the learning item, or
- Last Completion Date: The date the learner last completed the item.

The end of the first training period is determined by the assignment's initial due date or how often it recurs. For example, if the assignment date for an online course is 1/12/2016 and the recurrence setting is every 3 months, the end date for the first training period would be 4/13/2016.

Assigning Required Training

Once you determine what type of training period you are using, *select* **Create** to create the new training profile.

* Training Period Type

* Initial Due Date None

* Recurrence None

Allow completion after due date

Recurring Training Visibility Interval Recurring training is always visible in Current Training

Recurring training assignments display in Current Training when due within

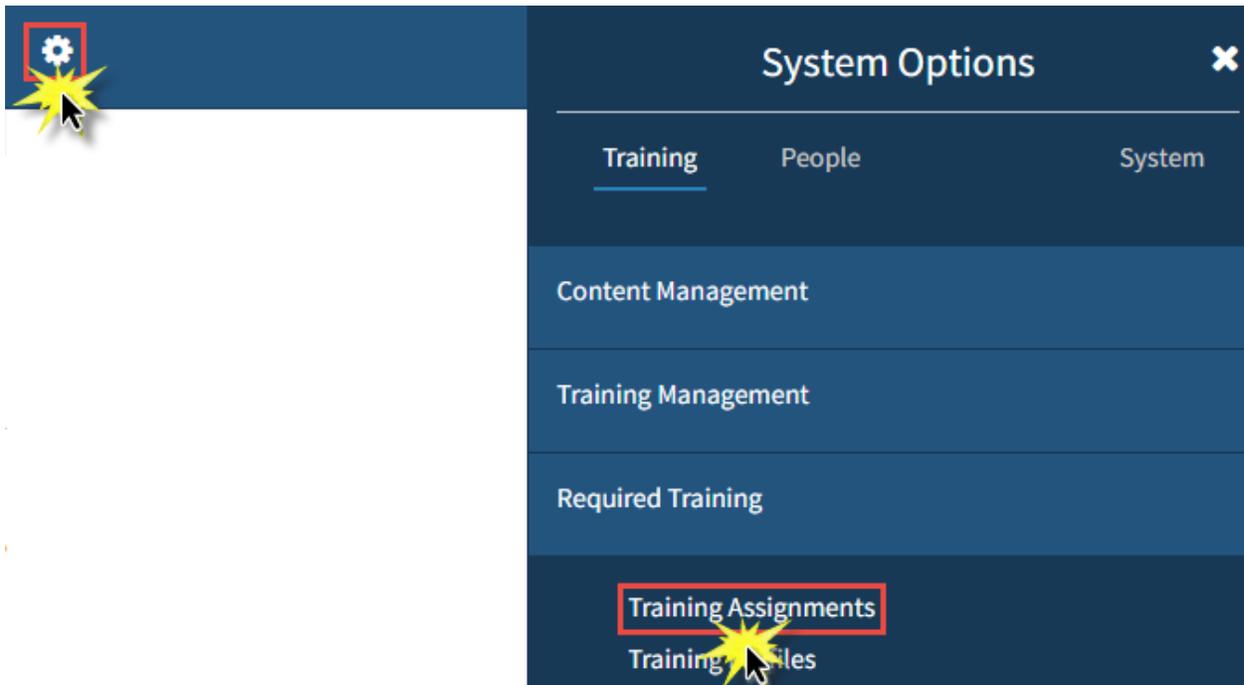
Create



To assign the training profile to a content item you will need to complete the following steps.

6. On the top menu bar *click* on **System** icon and a slide out menu to the right will appear. *Click* on **Required Training** and then on **Training Assignments**.

Assigning Required Training



7. Search for the content item you want to require. Next to the item, *click* on **Go**.

Simple Search | [Advanced Search](#)

To perform a search, select options from the menus, enter keywords in the Search Text field and then click Search. Use the Advanced tab to select criteria to further refine the results.

Acting Role

Search Text

Search Type

Records found: 1

	Title	Type	Action
 	DAS - CHRO Overview of Boards, Commissions, & Small Entities <i>This training provides new board and commission members and executive directors with general informat...</i>	Online	Required Training <input type="button" value="Go"/>

Assigning Required Training

8. Select Profile and *click* Go.

Required Training

[Training Profile Search](#) | [Assigned Entities Search](#)

Use the above links to either perform a search to find training profiles (entities that have been assigned training display in sub-tables) or perform a search to find entities that have been assigned training. Use the Page menu to perform other tasks.

Search Text

Select Profile

9. In the Search Text field, enter in the name of the profile you want to assign. *Click* Search. When you locate the training profile, click the radio button next to the name of the profile and then *click* Select.

Select Profile

[Simple Search](#) | [Advanced Search](#)

To perform a search, enter keywords in the Search Text field. Then make selections using the search criteria options, and click Search. Use the Advanced Search link to enter more specific search criteria for your search.

Search Text

Search Type

Records found: 1

	Training Profile	Profile Type
<input checked="" type="radio"/>	DAS - CHRO - Board & Commission April 2018 <i>This is the required training profile for new board and commission members appointed in April 2018.</i>	Dynamic Date

Assigning Required Training

10. In the Search Text field, enter in the name of the person or entity you want to assign the training to. *Click Search.*

Assign Training

Enter search criteria and then click Search. Select the checkboxes next to the entities to which training is to be assigned and click Assign Training.

Training Profile DAS – CHRO – Board & Commission April 2018

Search Text

Search Type

Type

User Activity

User Search

Include sub-organizations (If checked and at least one organization is selected, the sub-organizations are also assigned.)

Search

11. When you locate the person or entity, click the radio button next to the name and then *click Assign Training.* You'll receive a confirmation the training has been assigned. Continue this step until you have assigned the training to all the people or entities you need to.

Records found: 1

	Name/Title	Type
<input checked="" type="checkbox"/>	Meng, Brandy	User

Assign Training