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

4. You can send up to 5 reminder emails (this is optional).
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.
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Once you determine what type of training period you are using, select Create to create the new training profile.

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

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