Job Aid: Assign Learning via Assignment Profiles

Purpose

The purpose of the Assign Learning via Assignment Profiles job aid is to guide you through the step-by-step process of creating user assignment profiles.
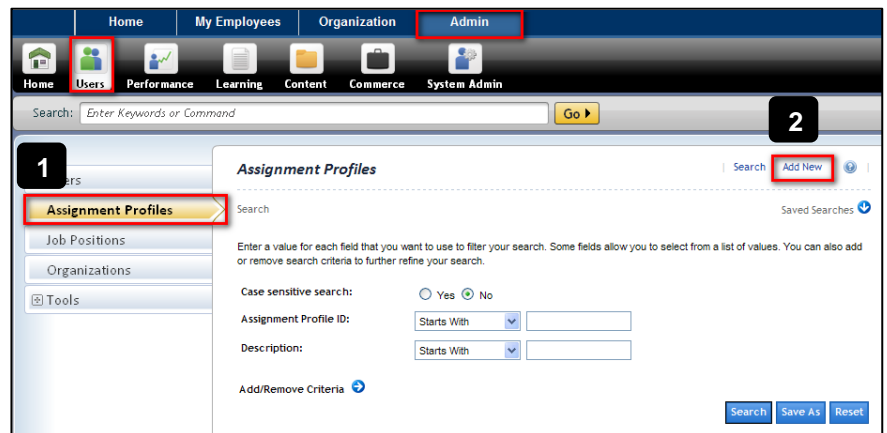
In this Job Aid, you will learn how to:
- Add New Assignment Profile
- Manage Rules
- Assign Curricula to Users via Assignment Profile
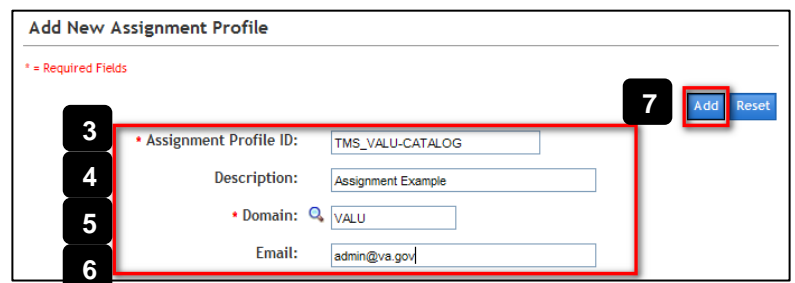- Assign Catalogs to Users via Assignment Profile

Task A. Add New Assignment Profile

Note: Verify that the **Admin** tab is selected.
1. Navigate to **Users > Assignment Profiles**.
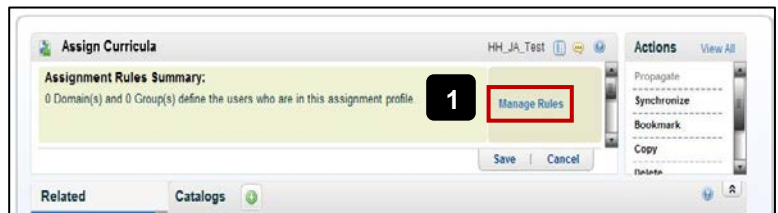2. Click the **Add New** link.

3. Complete the **Assignment Profile ID** field.
4. Enter a **Description**.
5. Select a **Domain**.
6. Enter a contact person's **Email** address.
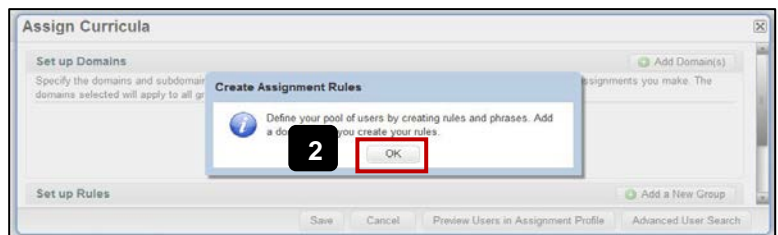7. Click **Add.** The new assignment profile has been added.

Task B. Manage Rules
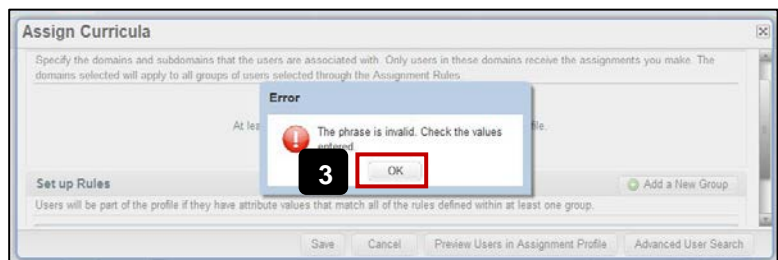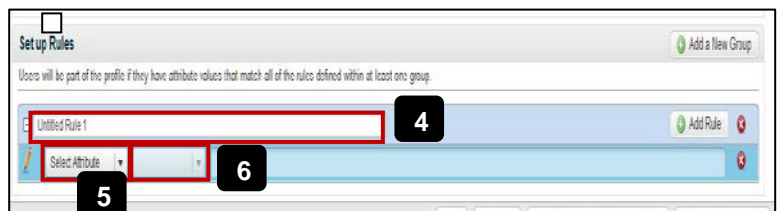
1. Click **Manage Rules**.

2. Click **OK** on the information pop-up.

3. Scroll to the bottom of the window. Click **OK** on the error pop-up.

4. Enter a unique group **Rule** title.
5. Select a user **Attribute** from the drop-down menu.
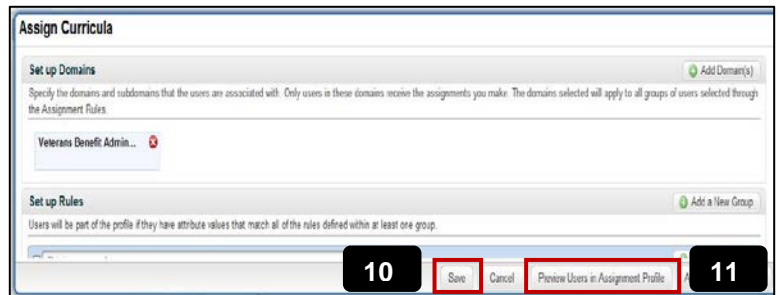6. Select an **Operator** from the drop-down menu.

7. Click the magnifying glass icon (value picker) to select/search for a value.

8. Scroll to the top of the window to add a domain.
9. Click **Add Domain(s)** to search and select a domain.

10. Click **Save** to save the changes.

11. Click **Preview Users in Assignment Profile** to review the list of users to be affected by this profile.

Task C. Assign Curricula to Users via Assignment Profile

Once an assignment profile has been created, training assignments can be defined.

1. Select the **Curricula** tab under **Related**.
2. Click the green plus sign (add new curricula icon) to search and select one, or more, curricula to be assigned by this assignment profile.

3. Click **Propagate** under **Actions** to assign the curricula to users.
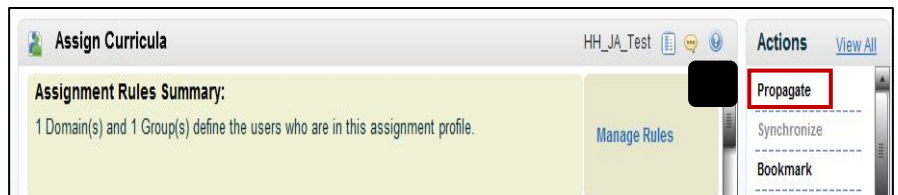
4. Select **Run this job immediately, if allowable** or **Schedule this job to be executed on:** and enter a specific **Date** and **Time**.

5. Click **Finish**. A status page appears.

6. Click **Back to Assignment Profile** to return to the assignment profile record.

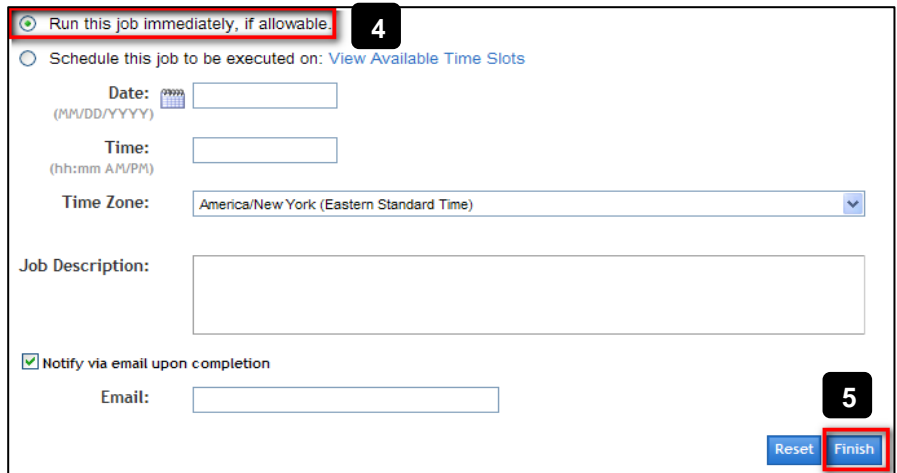## Task D. Assign Catalogs to Users via Assignments Profile

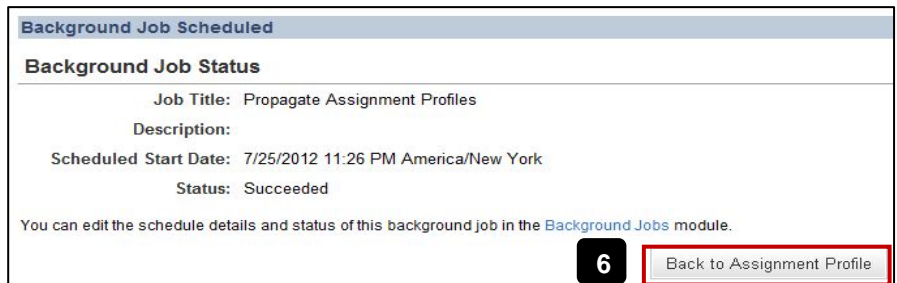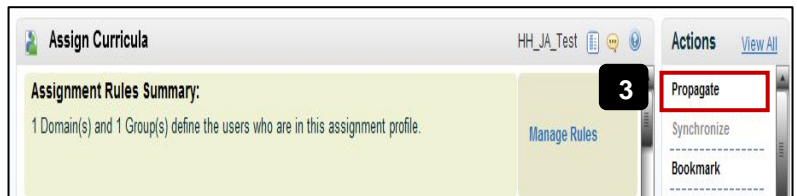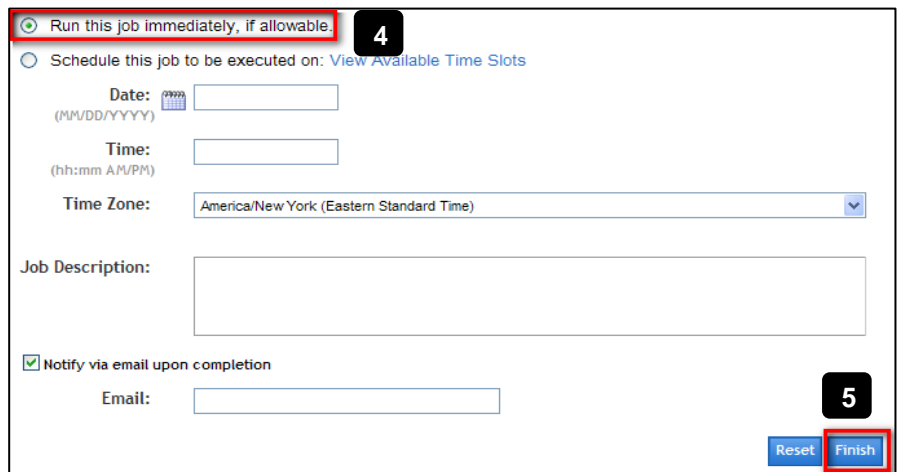Once an assignment profile has been created, catalog assignments can be defined.

1. Select the **Catalogs** tab under **Related**.
2. Click the green plus sign (add new catalogs icon) to search and select one, or more, catalogs to be assigned by this assignment profile.

Related	**1**	Catalogs	⊕ **2**
Catalogs		Description	
Competency Profiles			
Curricula			

3. Click **Propagate** under **Actions** to assign the catalog(s) to users.

Assign Curricula   HH_JA_Test 📄 💬 🖉   **Actions**   View All

Assignment Rules Summary: **3**   Propagate
1 Domain(s) and 1 Group(s) define the users who are in this assignment profile.   Manage Rules   Synchronize
                                                                                    Bookmark

4. Select **Run this job immediately, if allowable** or **Schedule this job to be executed on:** and enter a specific **Date** and **Time**.
5. Click **Finish**. A status page appears.

⦿ Run this job immediately, if allowable.   **4**
○ Schedule this job to be executed on: View Available Time Slots
    Date: 📅 [_____]
    (MM/DD/YYYY)
    Time: [_____]
    (hh:mm AM/PM)
    Time Zone: America/New York (Eastern Standard Time) ▼

Job Description: [_____]

☑ Notify via email upon completion
    Email: [_____]   **5**
                                        Reset   Finish

6. Click **Back to Assignment Profile** to return to the assignment profile record.

Background Job Scheduled
Background Job Status
        Job Title: Propagate Assignment Profiles
    Description:
Scheduled Start Date: 7/25/2012 11:26 PM America/New York
        Status: Succeeded

You can edit the schedule details and status of this background job in the Background Jobs module.

                                6   Back to Assignment Profile