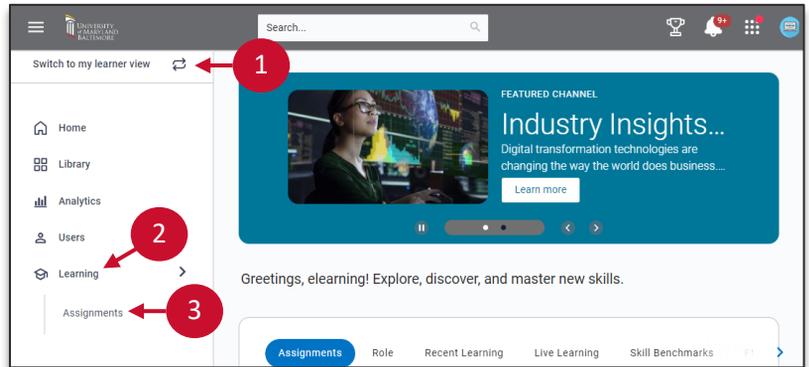


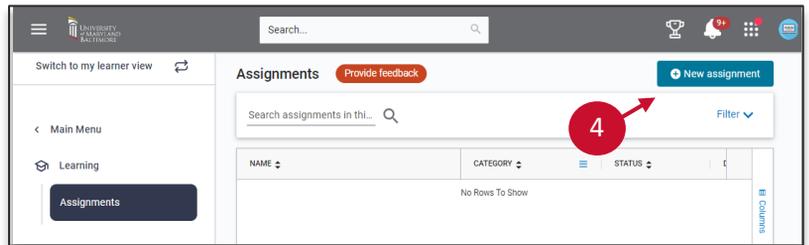
Manager's Guide: Assigning Training

Create an Assignment

1. In Percipio, select **Switch to my manager view** to see manager functions.
2. In the **Navigation Menu**, select **Learning**.
3. Select **Assignments**.



4. On the **Assignments** page, select **New Assignment**.



On the **Create Assignment** page, provide the following:

5. **Title:** What should the assignment be called?
Ex: course or initiative name
6. **Occurrence:** should this be assigned once, or should it repeat?
7. **Business Objective:** What is the purpose of the assignment?
8. **Category:** How would you define the type of training?
9. **Assigned by:** Who should appear as the assigner?
Ex: you, UMB department

A screenshot of the 'Create Assignment' form. The form has a progress bar at the top with five steps: 1. Describe your assignment (completed), 2. Add content, 3. Add users and audiences, 4. Manage emails, and 5. Review and launch. The form includes a 'Choose your languages' section with a dropdown for 'English (US)'. The 'Describe your assignment' section has fields for 'Title *' (with value 'Effective Communication'), 'Business objective *' (with value 'Operational effectiveness'), 'Assigned by *' (with value 'elearning'), and 'Category *' (with value 'Upskilling'). Red circles with numbers 5 through 9 point to these fields. The 'One-time' radio button is selected under 'Occurrence'. The status is 'Draft'.

Manager's Guide: Assigning Training

Create an Assignment (Continued)

10. **Assignment Description:** why is this training being assigned?
11. **Specify the Duration.**
 - a. **Specific date:** Assignments for all learners will be due on the chosen date.
 - b. **Number of days:** All learners (regardless of when added to assignment) have # of days to complete the assignment.
12. **Select Limited Access.**
13. **Select Next: Add content.**

The screenshot shows the 'Create an Assignment' form. The 'Description' field contains the text 'Training to improve our communication effectiveness as a team'. The 'Duration' section has 'Number of days' selected, with a start date of '04/01/2025' and 'Days to complete' set to '30'. The 'Manage access' section has 'Limited Access' selected. A 'Next: Add content' button is visible at the bottom right.

On the **Add Content** page:

14. **Select Assignment Completion** checkboxes as desired.
15. **Select the Add content** button to find content.

The screenshot shows the 'Add Content' page. The 'Assignment completion' section has three checkboxes: 'Learners can complete courses in any available language', 'Require learners to complete all courses from the beginning', and 'Content items must be completed in the display order specified'. The 'Add content' button is at the bottom left.

In the **Search for Content** pop-up:

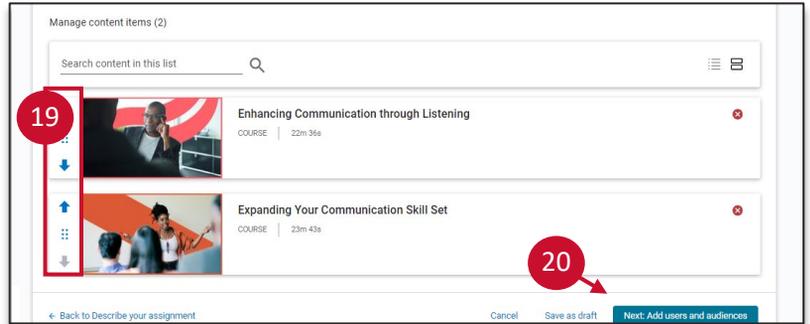
16. **Search** for content with keywords and filters.
17. **Select the plus** to add to the assignment.
18. When finished, select **Add content**.

The screenshot shows the 'Search for Content' pop-up. The search bar contains 'communication' and shows 334 results. The 'Filter by' section shows 'Course' selected with a filter of '15 - 45 minutes'. The results list includes 'Expanding Your Communication Skill Set' and 'Enhancing Communication through Listening'. A 'plus' icon is next to the first result, and an 'Add content' button is at the bottom right.

Manager's Guide: Assigning Training

Create an Assignment (Continued)

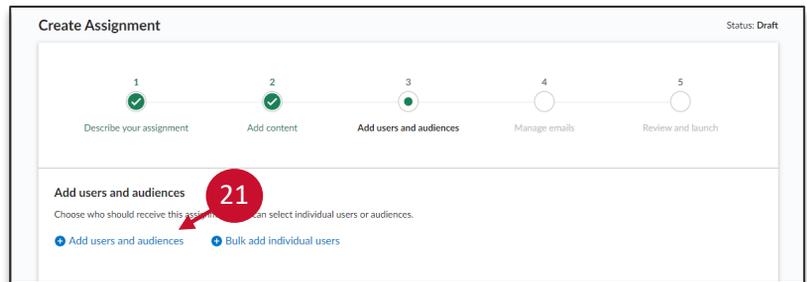
19. Use the **Arrows** to order items as desired.
20. Select **Next: Add users and audiences**.



On the **Add Users** page:

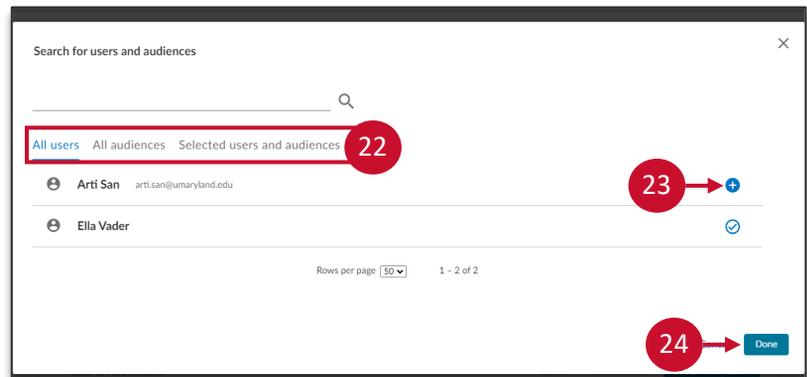
21. Select **Add users and audiences**.

Note: Select the **Bulk** option to add users via an Excel template.



In the **Search for User and Audience** pop-up, review your list of users.

22. Use the **Users** tab to assign to individual users. Use the **Audiences** tab, to assign to a group. Use the **Selected** tab to confirm your selections.
23. Select **plus** to add a user to the assignment.
24. When finished, select **Done**.



Manager's Guide: Assigning Training

Create an Assignment (Continued)

On the **Manage Emails** page:

22. To modify emails, select **Customize and preview emails** tab (optional).
23. Adjust reminder settings if desired.
 - a. **Notifications on/off**
 - b. **Send date and time**
 - c. **Reminder emails on/off**
24. When finished, select **Review and Launch**.

Review the assignment details on the **Summary** page and adjust as needed:

25. When finished, select **Launch Assignment**.

Edit an Assignment

The **Assignments** page lists all created assignments.

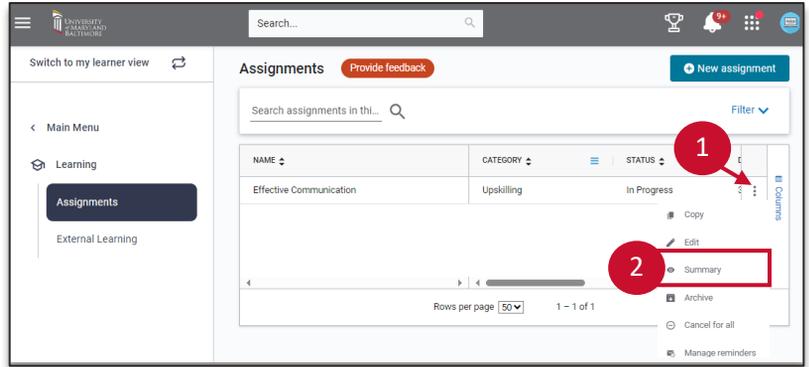
1. Select the **3 vertical dots** to view available actions.
2. Select **Edit** and make desired adjustments.

Manager's Guide: Assigning Training

View Assignment Analytics

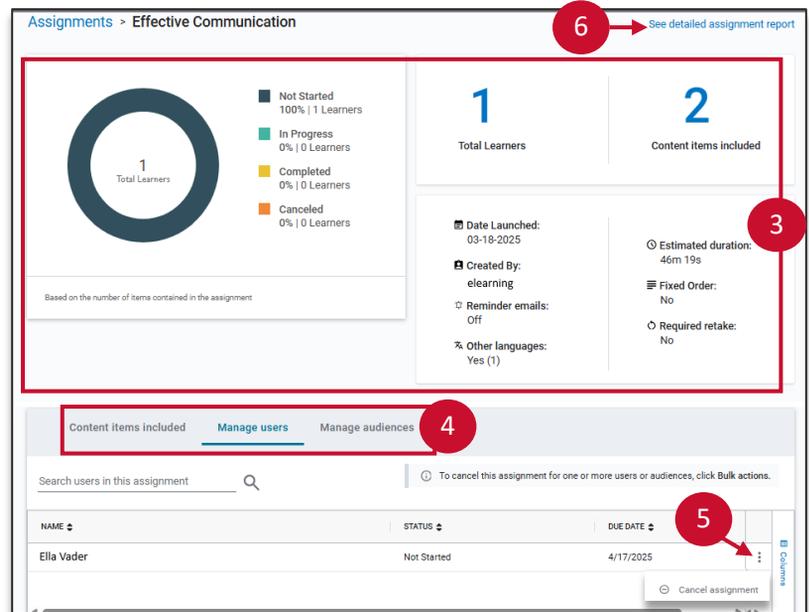
On the **Assignments** page:

1. Select the **3 vertical dots** next to the assignment.
2. Select **Summary**.



On the **Assignment Summary** page:

3. Review the **Summary** and **Details** for an overview.
4. Toggle between tabs to review **Content Items** and manage the assigned **Users** and **Audiences**.
5. From the **User** or **Audience** tab, select the **3 vertical dots** next to a user to **cancel** an incomplete assignment.
6. For a downloadable report, select **Detailed Assignment Report**.



Compliance Assignments

Compliance-specific assignments are managed by the system administrator in collaboration with the issuing department. Compliance assignment support can be requested using the [request form](#).