Manager’s Guide: Assigning Training

Create an Assignment

1. In Percipio, select the LEARNING drop-down menu. Then, select Assignments.
2. On the Assignments page, select New Assignment.

On the Create Assignment page, enter the following information:

3. Title (Assignment name)
4. Business Objective (target of the assignment)
5. Assigned by (select yourself or type the name of your department)
6. Assignment Description

Scroll down to the duration:

7. Select the desired duration options.
8. Select the Next: Add content button or Save as Draft to return later.
Manager’s Guide: Assigning Training

Add Content

On the Add Content page:

9. Select the Content Items checkboxes as needed to reflect assignment requirements.

10. Select the Add content button.

In the Search for Content pop-up:

11. Search for content with keywords. Select the plus symbol to add content.

12. Select the Add content button.

13. Select Next: Add users and audiences.

Add Users

On the Add Users page:

14. Select the add users and audiences button.

Note: Select Bulk add individual users to access a template for bulk uploading.
15. Use the **search bar** to search for users. Select the **plus symbol** to add to the assignment.

16. Use **Users and Audiences** tabs to filter results. Use the **Selected** tab to confirm selections.

17. Select the **Done** button.

**Notify Users**

On the **Manage Emails** page:

18. Toggle the **Notification email** button on/off.

19. If sending a notification: select the delivery date and time.

20. To modify the message, select the **Customize and preview emails** tab.

21. When finished, select **Next: Review and Launch**.

Review the assignment details on the **Review** page:

22. When finished, select the **Launch Assignment** button.
Edit an Assignment

On the **Assignments** page, the new assignment displays in the list.

1. Select the **3 vertical dots** to view options including copy, edit, assignment summary, and archive.

**Note:** only assignments in **Draft** status can be deleted. **In Progress** assignments must be archived.

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](#).