Manager’s Guide: Assigning Training

Create an Assignment

1. In Percipio, select **Switch to my manager view** if needed to see manager functions.

2. In the **Navigation Menu**, select **Learning** to reveal learning options.

3. Select **Assignments**.

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

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

5. **Title** (Assignment name)

6. **Business Objective** (target of the assignment)

7. **Category** (choose the best fit)

8. **Assigned by** (yourself or type the name of your department)

9. **Assignment Description** (why is this training being assigned?)
Manager’s Guide: Assigning Training

Scroll down to **Duration:**
10. Select the desired duration options.
11. Select the **Next: Add content** button.

Add Content

On the **Add Content** page:
12. Select **Content Items** checkboxes to reflect assignment preferences.
13. Select the **Add content** button to search for courses to assign.

In the **Search for Content** pop-up:
14. Search for content with keywords. Select the **plus symbol** to add content.
15. Select the **Add content** button.

16. Use the **Arrows** to organize items as desired.
17. Select **Next: Add users and audiences.**
Manager’s Guide: Assigning Training

Add Users

On the Add Users page:

18. Select the Add users and audiences button.

Note: Select the Bulk option to add users via spreadsheet.

19. Use the Search bar to find users. Select plus to add them to the assignment.

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

21. Select the Done button.

Notify Users

On the Manage Emails page, review default settings.

22. Adjust settings if desired.
   a. Notifications on/off
   b. Send date and time
   c. Reminder emails on/off

23. To modify emails, select Customize and preview emails tab (optional).

24. When finished, select Next: Review and Launch.
Launch an Assignment

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

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

Edit an Assignment

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

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

**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**.