

Create Training Assignments

Training assignments allow you to take one or more courses and assign them to individual users. Assignments have no due date by default, but you may require users to complete content within a given time frame or by a specified date.

Each training assignment is divided into three tabs:

- **Content:** Displays a list of courses added to the training assignment. Depending on the training assignment, you may have the option to add or remove courses.
- **Assignees:** Displays a list of users, user groups, organizations, job titles, or roles associated with the training assignment. Depending on the training assignment, you may have the option to add or remove assignees.
- **Due Date:** Displays the due date settings for an assignment, including recurrence information, whether previous and past completions count toward a training assignment, and when training periods begin. This tab also allows you to update the notification settings for an assignment.

STEP 1 - Create a new assignment:

1. Hover over the **Manage** menu in the navigation bar.
2. Select the **Training** option. The Training page displays.
3. Find the **Training Assignments** portlet.
4. Select the **Create Training Assignment** link.
5. Select the **Edit** icon (Edit Assignment Name). The assignment name becomes an editable field.
6. Enter the assignment name in the field.
7. Select the **checkmark** button to save your changes.

STEP 2 - Add courses:

1. Select the **Add Content** button. The Add Content window displays a list of active courses.
2. Use the **search field** to filter your list of courses. (Optional)
3. Use the **checkboxes** to select the courses you want to add. Multiple courses may be selected.
Note: You may need to navigate multiple pages of search results to find the desired courses.
4. Select the **Add** button. The window closes, and the selected courses are added to the learning content list.
5. Repeat steps 1-4 to add additional courses to the assignment.

STEP 3 - Add assignees:

1. Select the **Assignees Tab** and then select the **Add Assignees** button.
The Add Assignees window displays a list of active assignees.
2. **Enter keywords** or phrases in the search field to find specific users. (Optional)
3. Select the **Search** button (search). The list of assignees updates, matching your search criteria.
4. Use the **checkboxes** to select the assignees you want to add.
Note: You may need to navigate multiple pages of search results to find the desired names.
5. Select the **Add** button. The window closes, and the selected users are added to the assignees list.

Create Training Assignments (Continued)

STEP 4 – Select a due date:

1. Select the **Due Date** tab.
2. Select the **Change** button. The Assignment Due Date window displays.
3. Use the **Yes/No** toggle to indicate the assignment does have a due date. Additional options display.
4. Use the **Is this a recurring assignment** radio buttons to select "No."
5. Use the **When is it due** radio buttons to select the your desired due date option.
The **Within** option is **recommended**. Enter the desired time period.
6. Leave the **previous completions** setting to **No**.
7. Use the radio buttons to choose whether completing the training after the due date counts toward completing the assignment. The recommended option is **Yes**.
8. Use the **Email Reminder** option to schedule system emails for users with impending training deadlines. (Optional)
9. Use the **Send extension** emails toggle to indicate whether users should receive email notifications when they receive an extension for a training deadline. Note: The default setting is "Yes."
10. Select the **Save** button. The window closes, and a summary of your selections displays on the Due Date tab.

STEP 5 – Complete assignment:

1. Select the **Assign** button. Each learner will receive an email notification.
Note: Once an assignment has been made, the due date/period cannot be changed. However, extensions can be made.

Modify or Cancel Training Assignments

Utilize the Online Help feature for detailed instructions:

1. Hover over the **Manage** menu in the navigation bar.
2. Select the **Training** option. The Training page displays.
3. Select the **Manage Training Assignment** link.
4. Click on the **?** Located at the top of the page.
5. Navigate to the option you need assistance with.

For help:

1. Click on the **?** Located at the top of each page for help on the specific page you are currently on
2. If you need technical assistance email htvnsupport@housingcenter.com

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