# 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.**
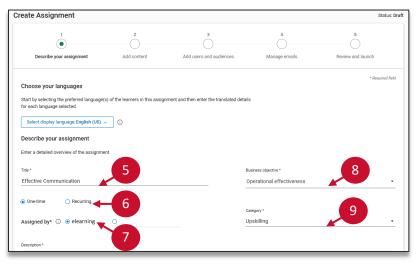


On the **Create Assignment** page, provide the following:

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



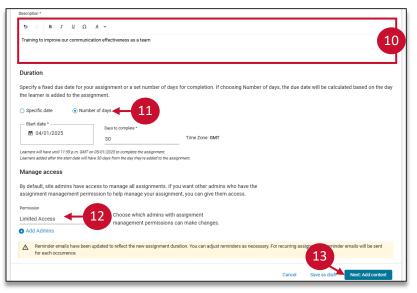UNIVERSITY *of* MARYLAND BALTIMORE

## 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.

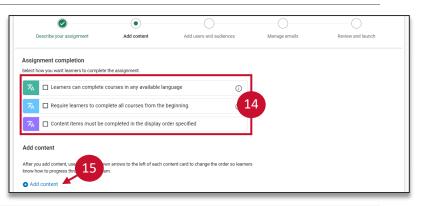12. Select **Limited Access**.

13. Select **Next: Add content**.
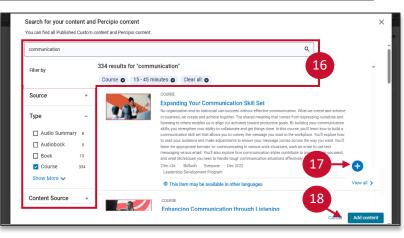
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On the **Add Content** page:

14. Select **Assignment Completion** checkboxes as desired.

15. Select the **Add content** button to find content.

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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**.

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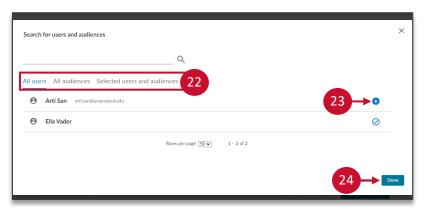
In the **Search for User and Audience** pop-up, review your list of users.

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**.

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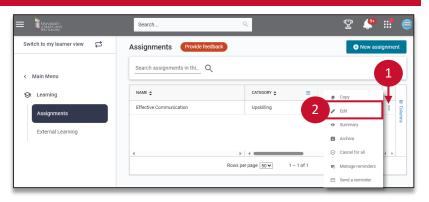
25. When finished, select **Launch Assignment**.

## 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.

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## 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.