Creating and Tracking Assignments

Now that you created User accounts and Groups, and customized your Home

Page, you are ready to make Assignments in the Learning Center.

In this course, we show you how to Assign classes, tests, and tasks, and how to monitor them.

We also review the Transcripts tab where the Epicor Learning Center documents Learners activity.

Let's get started.

As the System Administrator, you have the ability to assign Tasks, Courses, Tests, Agendas, and Accomplishments.

You can do this for individual Users or Groups.

To begin, click the Assignments tab and select New Assignment.

Notice that the Learning Center listed all available items here by type.

Use the fields at the top of the page to filter this output and quickly find the Assignment in question.

In this example, we assign an Agenda for all Point of Sale clerks.

Select Agenda in Type of assignment and enter Point of Sale in the Keyword field.

Using an acronym such as POS will not return a full listing of agendas pertaining to Point of Sale.

Category and Subcategory are associated with Courses and Tests so we can leave those blank for now.

Click Submit. Next you see a list of all the Agendas that contain Point of Sale in either the title or the description.

Locate the Agenda that you want to Assign and click the title.

Using a copy of the Agenda by Role Matrix will help you decide which Agendas to assign.

You can find the most current version in the Message Center on the Learning Center Home page.

Now you are ready to create the Assignment.

First, select the User or Group.

You can use the Control button on your keyboard to select multiple names.

The Override Existing Completion Status checkbox allows you to require employees who have already completed an Assignment to repeat it.

Leave it unchecked if you do not require them to take the course again.

Since Agendas are predetermined training plans, they contain more than one Assignment.

When you assign an Agenda, you see the various Assignments that make up the agenda listed here.

Review the assignments to make sure that they are set up as you wish.

Notice that you can change information on any individual assignment.

If the assignment is a Test, you can also change the Passing Score or the option to Show Answers.

When you have multiple Assignments and you want to use the same Start and Due Date for each, enter the information for Assignment 1, and then click the Copy first Start Date and Due Date to all assignments link.

The system adds the dates for the other assignments automatically.

When you complete the changes that you want to make, click Submit.

The system displays a note confirming the Assignments updates, and you are ready to continue with the next.

Now that you Assigned an Agenda or some other element to a User, how do you determine the status of that Assignment?

Has it been completed, or even started, or is it past due?

System and Learning Administrators have three options on the Assignments tab for gathering this information.

Just as the title implies, My Assignments lists your own outstanding assignments.

If the person signed-on is not a System or Learning Administrator, this is the only option available.

The Employee Assignments option allows you to select a specific employee and view their assignments.

You also have the capability to Search for specific assignments.

Let’s look at the Employee Assignments option first.

After selecting an employee, the Learning Center displays their Open assignments in Due Date order.

Remember, Open assignments have not been completed.

Here you can see at a glance, the Start and Due date, and the Status.

A Past Due note identifies any late lessons.

You can view All Assignments, including those completed, by clicking the All Assignments link.

Likewise, click the Agendas link to view assignments by Agenda.

Click any of the headings to re-sort the list.

When you want to add an Assignment, select the Add New Assignment for this Employee link, and then complete the assignment details.

The Learning Center examines the employee’s transcript and, by default when making an assignment, the system does not reassign content previously assigned to an employee.

This is helpful when assigning agendas to groups.

When you assign an agenda to a group, the system assigns all items to employees who have not completed any of the assignments, and only net new courses to employees that have completed some of the agenda items.

You do have the option to reassign courses to individual employees or groups regardless of their prior completion by enabling the Override Existing Completion Status check box on the Create an Assignment for an Employee or Group page in New Assignments.

You can Delete an assignment by clicking the Delete link, and then confirming the deletion.

To delete all courses from an agenda, open the Agendas tab, and delete the entire agenda at once.

The system will not delete any courses that are In Progress or Completed.

Once you delete the Agenda, you can delete the In-Progress courses individually.

The Search feature is a powerful reporting tool that enables you to refine the information displayed.

You can search assignments by Type to look at a particular Course, Task, or Test.

You can also search by Status to determine which assignments are In Progress or have Not Started.

You can search by specific Employee, by Group, by Category, or by Subcategory.

Depending on the selections that you make at the top of the page, you may also be able to refine your selection by Course, Task, Test, Accomplishment, or Agenda Name.

Use the Assignment Dates section to set date parameters for your search.

You can use any or all of these fields.

Once you select your filters, click the Search button.

After the results page loads, you can re-sort the data by column heading.

If you want to alter any of the assignment details, simply click the assignment title, update the information, and click Submit to save the changes.

Use these buttons to export a copy of your results to Excel or print a hard copy.

The final key to managing assignments is the Transcripts tab.

This is where you find employee's completed Courses, Tests, Tasks, Accomplishments, Agendas, and Certifications.

While most employees will only see their own transcript in this section, you, as the System or Learning Administrator have access to your own transcript as well as Employee Transcripts and a Search feature.

The Transcripts tab shows Assignments that your employees completed, and any Courses they completed on their own.

You can select an individual employee to view on the Employee Transcripts link.

The Learning Center displays the results by Assignment Type.

The default view opens to Courses.

Use the Tests link to see an employee's test scores as well as Pass/Fail Status.

If the employee failed the test, and has no remaining Attempts, you can reassign it to them by clicking the Reassign link.

Use the Transcripts Search page to search by Type.

We'll search for Courses assigned to the LMS Admin.

Include any other selections such as Start and End date, a specific Employee or Group, or a particular Category or Subcategory, and then press Search.

Use the column headings to re-sort the results.

Now let's search for Tests assigned to the LMS Admin.

Notice that the Score field is a hyperlink when the Type is Test.

Click the link to view the completed test.

To see the Course linked to the test, click the Show Training link.

The Course Title appears in a link on the Recommended Training line below each question.

The link takes you to the Course Detail page for the associated training.

System or Learning Administrators can use the Admin Actions options on the Course Detail page to re-assign the Course when necessary.

Similarly, you may reassign or reset a test when an employee failed to complete it successfully within the number of attempts that you specified in Customer Settings.

To do this, open the Employee Transcript page, locate the desired test, and then reassign from the active link.

Training on Demand offers multiple paths to assign coursework. By selecting specific Users or Groups, you can direct your staff toward learning specifically designed for them.

With a clear roadmap, your Administrator can easily review status information on the Transcript tab and ensure timely completion of Agendas, Tests, and other assignments.

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