

## Using Epicor Learning Center's Automated Roles: A Quick Overview

By now you know how the Epicor Learning Center uses roles to align content to users, and to help you deliver a complete educational plan with minimal work on your part.

You're on board, but you're asking: "I've already got users in my system assigned to groups. What happens to me?" Yes, you. I hear you. And I have an answer for you.

We've replaced groups with roles. They aren't gone -- they're just a little different. Anywhere you used groups, look for the heading Roles and you will see yours.

If you do nothing else, these roles that were once groups will continue to do everything they used to. You can still create assignments and track progress by group. You don't have to change the way you do anything.

If I might be so bold though, I'd like to suggest you don't stop there, because with a little more setup, there's so much more the Epicor Learning Center can do for you.

First, you can copy the users in your groups to the Epicor-defined roles that are the best match. There's a link on the bottom of the Role screen that allows you to select your group name and perform the copy in one step! Once you do this, your new roles are set up to receive auto-assignments, and you'll get notifications whenever we update the recommended content for these roles.

If there's something about the default roles that doesn't fit as well as you'd like, that's fine. Change it! We've provided a lot of dials and switches for you to play with here. No, not literally. I mean there's a lot of details you can

adjust, from changing the training content of a role to the time allowed for assignment completion, and more.

Your other option is attaching agendas to your roles yourself. While this is a little bit more work up front, it also is a great way to get the training plan that's tailor made just for you.

Remember, it's best to review content for these roles before adding users to them. A little work now for a lot less work later. It's a pretty good trade.

I'm sure you've noticed that both these options are fantastic time savers, but there's something you should consider when doing this.

We recommend you complete setting up your roles and getting the material in place for each of them before you add any users to these roles. Otherwise you'll have to make adjustments to each user, and you don't want to do that. Set up the roles, then assign the users, and everything's done for you after that.

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