Reviewing Employee Assignments, Transcripts, and Tests

You can use the many tools available in Epicor Learning Center to stay top of training progress.

As a system administrator, you can make and manage assignments, review employee transcripts and reports, adjust due dates, and reassign failed tests when needed.

Select an option to take a look at these processes.

Creating Assignments

Need to assign some content to your learners?

You can create an assignment by clicking Assignments, then New Assignment.

From here, filter by assignment type.

If you filter by Course or Test, you can further narrow your search by category and by subcategory.

Let's stick with Agendas since we want to use a recommended training path that includes a group of courses and a test together.

Next, I'll click Search to limit my selection to only show Agendas.

Click the name of the Agenda you'd like to assign.

I'll assign Accounts Payable Setup.

Next, choose who you'd like to assign the agenda to – or which role you'd like to assign the agenda to using the Employees dropdown.

Note that if your student has already completed some of the content in this agenda, they won't be re-assigned that material—only the new material!

On the other hand, if you know the employees in question have already completed this agenda and you need them to do it again because of an annual certification review, click Override Existing Completion Status.

You can keep your management team updated by entering additional recipients for notifications by entering additional email addresses here.

Next, set the start and due dates for the first assignment. If you'd like, you can copy these dates to the rest of the assignments in this agenda.

When you're ready, click submit.

The agenda has been assigned and the related learners will be notified by email.

Reviewing Assignments

You can view individual employee assignments by clicking Employee Assignments under Assignments, then choosing the employee name from the dropdown.

Enter an employee's first or last name to filter and select and then click Search.

By default, you'll land on that employee's Open Assignments page. This contains a list of everything they have yet to complete.

This view can also be filtered by switching between open assignments, all assignments, agendas and roles.

If you display all assignments, you'll see a list that includes both completed assignments and assignments that the employee has not yet finished

Open assignments displays a list of just unfinished assignments.

Let's look at the Agenda view.

You can sort the results by Type, Name, Start Date and Status.

Click an agenda to expand it and view all of its components.

Clicking on a course allows you to view the course yourself, review its details page, or adjust assignment criteria from the control panel.

Now, let's look at the Roles view.

Here we can expand the role and view the agendas related to this role.

Click an agenda to expand it.

Much like the agenda view, you have the options to view individual courses, view the details, or adjust assignment criteria like the due date.

Click the Assignment button.

Change the necessary details, then click Submit.

Transcripts and Reports

All completed learner activity is stored in a transcript.

Click Transcripts, then employee transcript, and choose an employee. You can filter by either first name or last name.

Much like other views, this can be filtered by courses, tests, tasks, accomplishments, and agendas. Remember, these are transcripts so, by definition, it will only display the materials the user has completed.

If you want to report on more than one individual, use the Assignment or Transcript Search/Report Tool. This report writer lets you define what you want to see and for which learners.

We'll open Transcripts and click Search/Report.

Choose a Search Type. This field is mandatory. Let's just look at completed agendas. Notice that as I select an element, I'm able to use the related filter below.

Now I'll add a completion date range so all Agendas completed during this time will be included.

Then, click Search.

Here we can see our report. Users are listed on the left, followed by the types of assignments and their respective names. On the right we can see the date of completion.

If no date has been given, that means an admin marked the agenda as complete.

Click Export to Excel and a popup will appear mentioning that your report is being built.

Once finished, click the download link to see your report.

If you need to report on past due assignments, the process is nearly identical, but you'll need to switch from Transcripts to Assignments.

Click Assignments, then Search/Reports.

Just like with Transcript reports, the only required selection is the Search Type.

I'll select Agendas again, but here, I'll specify In Progress as the status and enter a Due Date range

Here you can see the results of your search.

Additional data is visible here, showing the percentage of completion as well as the original due date.

And just like with transcripts, click Export to Excel, wait for the popup, and you have your results.

Managing Tests

As much as we like to think that everyone gets everything the first time around, that's not always the case.

So, what do you do when an employee fails a test and is out of retries? You still want to make sure they understand the material.

The answer is simple: reassign the test.

From Transcripts, select Employee Transcripts. Next, use the dropdown to search for the employee.

On the Tests tab, you can see all the employee's tests.

Here you can see that this employee failed a test and is out of retries by looking at the Pass/Fail status column.

Click the second one. Simply click the Reassign link to reassign the test.

You have a couple of options here.

You can choose to override the current test status with the new one.

This resets the completion status to Not Started.

Enter the new due date for the test and update any of the additional criteria as needed.

If you'd like to leave some notes for yourself and the student, you can use this field.

When you're ready, click Submit.

The test will show up in the employee's assignments and they can retake it when ready.

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