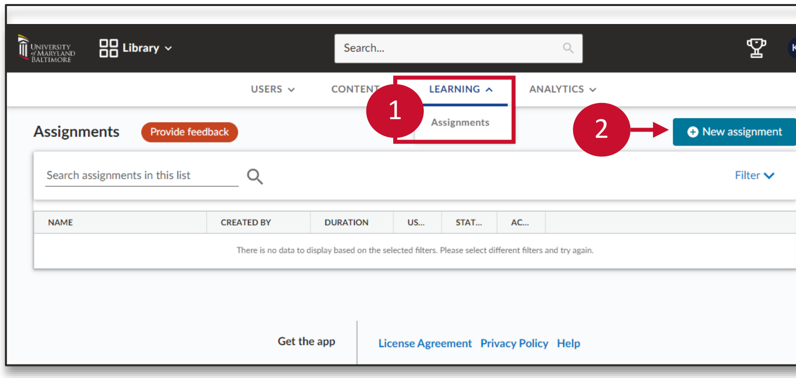
Manager's Guide: Assigning Training

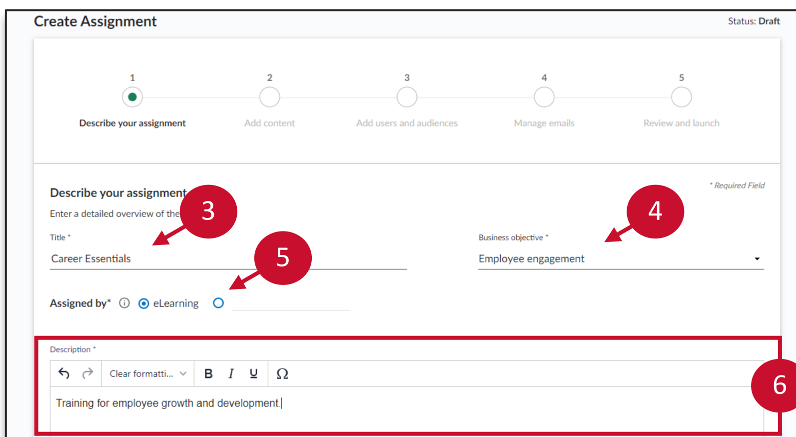
Create an Assignment

1. In Percipio, select the **LEARNING** drop-down menu. Then, select **Assignments**.
2. On the **Assignments** page, select **New Assignment.**



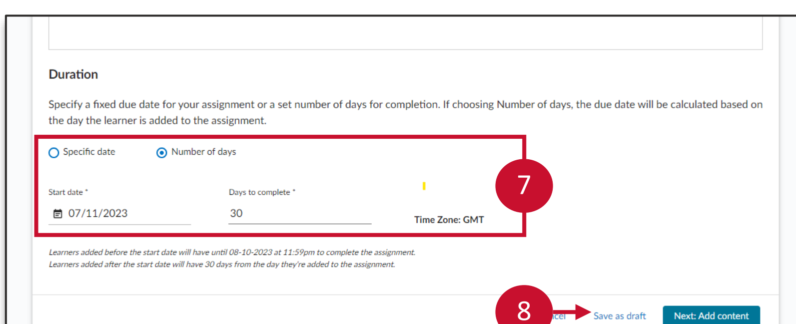
On the **Create Assignment** page, enter the following information:

3. Title (Assignment name)
4. Business Objective (target of the assignment)
5. Assigned by (select yourself or type the name of your department)
6. Assignment Description



Scroll down to the duration:

7. Select the desired duration options.
8. Select the **Next: Add content** button or **Save as Draft** to return later.



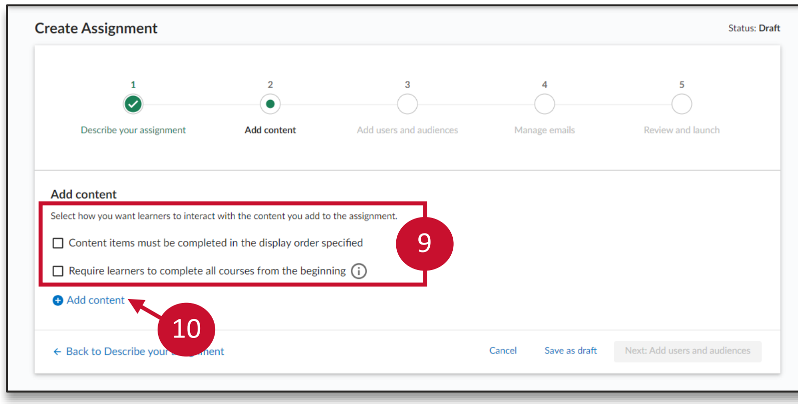
UNIVERSITY *of* MARYLAND BALTIMORE

Manager’s Guide: Assigning Training

Add Content

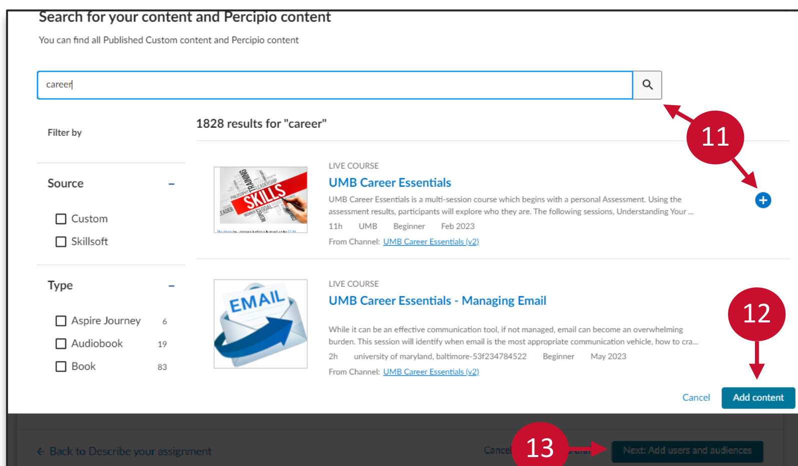
On the **Add Content** page:

9. Select the **Content Items** checkboxes as needed to reflect assignment requirements.
10. Select the **Add content** button.



In the **Search for Content** pop-up:

11. Search for content with keywords. Select the **plus symbol** to add content.
12. Select the **Add content** button.
13. Select **Next: Add users and audiences**.

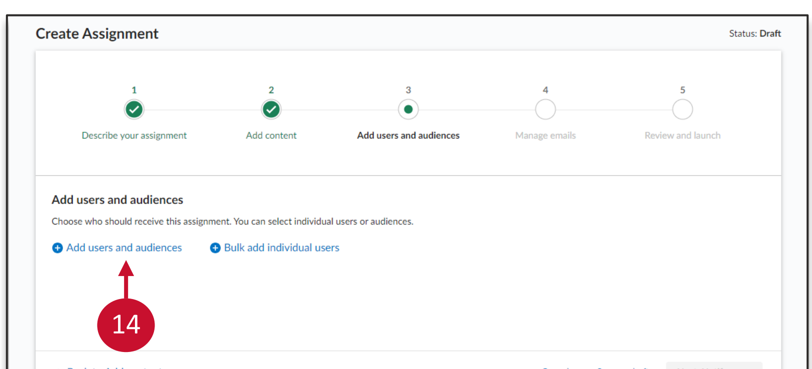


Add Users

On the **Add Users** page:

14. Select the **add users and audiences** button.

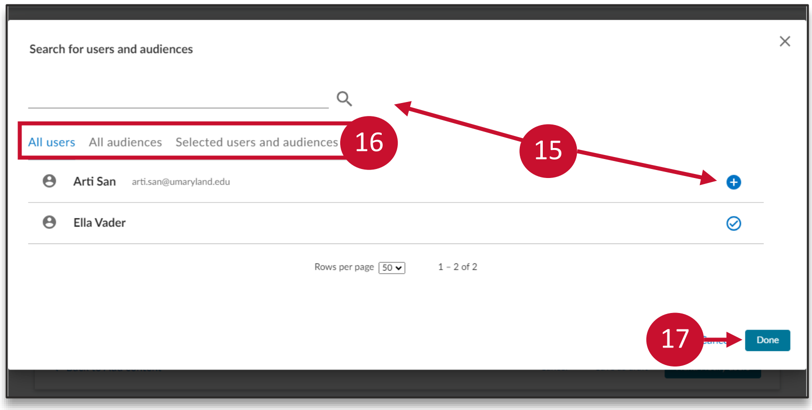
Note: Select **Bulk add individual users** to access a template for bulk uploading.



UNIVERSITY of MARYLAND BALTIMORE

Manager's Guide: Assigning Training

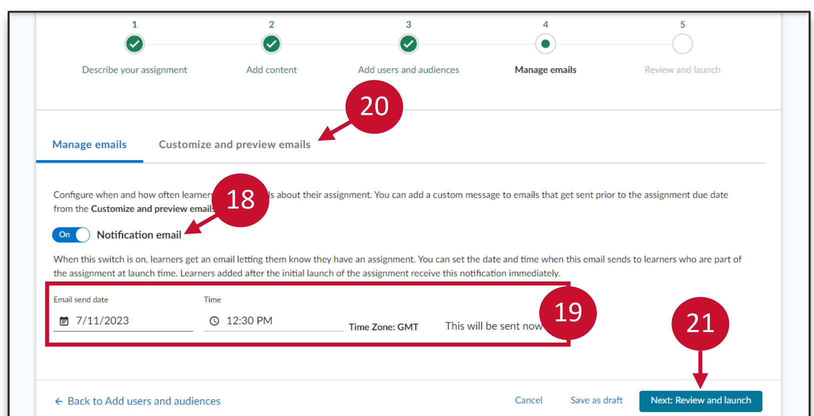
15. Use the **search bar** to search for users. Select the **plus symbol** to add to the assignment.
16. Use **Users** and **Audiences** tabs to filter results. Use the **Selected** tab to confirm selections.
17. Select the **Done** button.



Notify Users

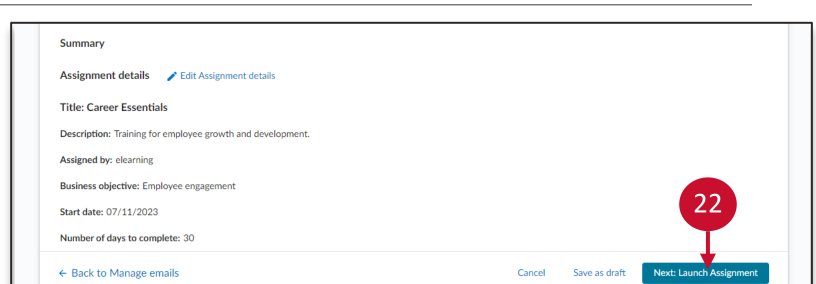
On the **Manage Emails** page:

18. Toggle the **Notification email** button on/off.
19. If sending a notification: select the delivery date and time.
20. To modify the message, select the **Customize and preview emails** tab.
21. When finished, select **Next: Review and Launch**.



Review the assignment details on the **Review** page:

22. When finished, select the **Launch Assignment** button.

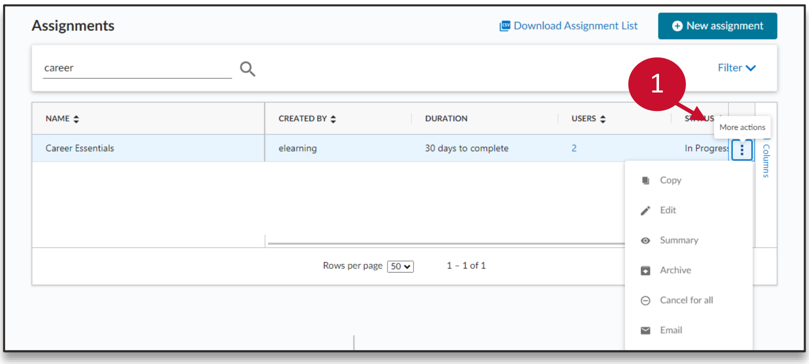


Edit an Assignment

On the **Assignments** page, the new assignment displays in the list.

1. Select the **3 vertical dots** to view options including copy, edit, assignment summary, and archive.

Note: only assignments in **Draft** status can be deleted. **In Progress** assignments must be archived.



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].