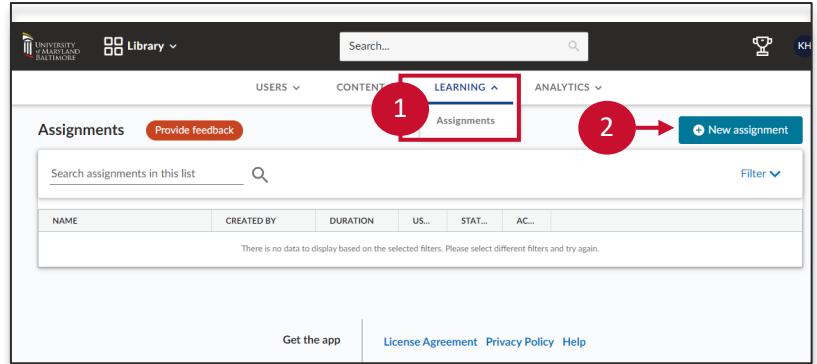


Manager's Guide: Assigning Training

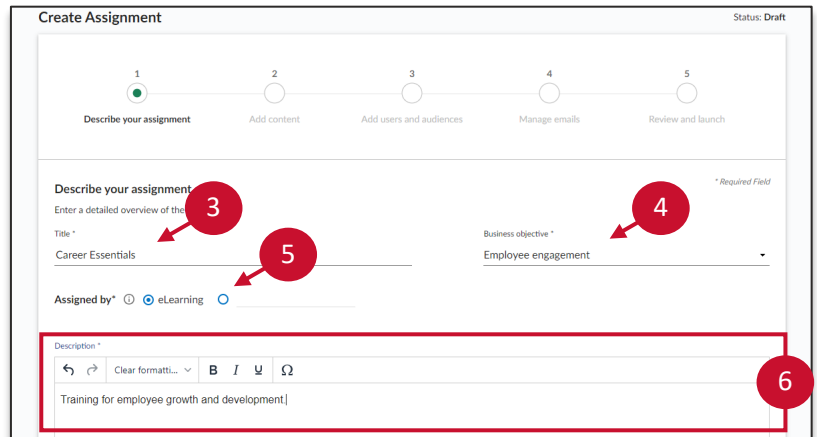
Create an Assignment

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



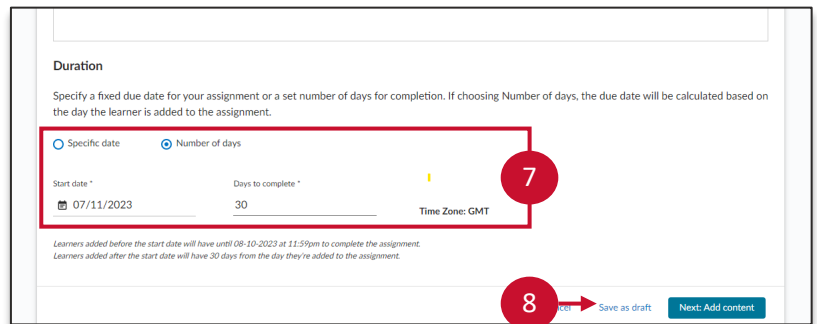
On the **Create Assignment** page, enter the following information:

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.



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.

The screenshot shows the 'Create Assignment' page with a progress bar at the top. Step 2, 'Add content', is the active step. Below the progress bar, the 'Add content' section is highlighted with a red box. It contains the instruction: 'Select how you want learners to interact with the content you add to the assignment.' There are two checkboxes: 'Content items must be completed in the display order specified' and 'Require learners to complete all courses from the beginning'. A red circle with the number '9' is next to the second checkbox. Below the checkboxes is a blue '+ Add content' button with a red circle and the number '10' pointing to it. At the bottom, there are navigation buttons: 'Back to Describe your assignment', 'Cancel', 'Save as draft', and 'Next: Add users and audiences'.

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**.

The screenshot shows the 'Search for your content and Percipio content' pop-up. A search bar contains the keyword 'career'. Below the search bar, it says '1828 results for "career"'. There are two filter sections: 'Source' with 'Custom' and 'Skillsoft' checkboxes, and 'Type' with 'Aspire Journey', 'Audiobook', and 'Book' checkboxes. Two search results are shown. The first is 'UMB Career Essentials' with a red circle and the number '11' pointing to a plus sign. The second is 'UMB Career Essentials - Managing Email' with a red circle and the number '12' pointing to an 'Add content' button. At the bottom, there are navigation buttons: 'Back to Describe your assignment', 'Cancel', a red circle with the number '13' pointing to the 'Next: Add users and audiences' button, and 'Next: Add users and audiences'.

Add Users

On the **Add Users** page:

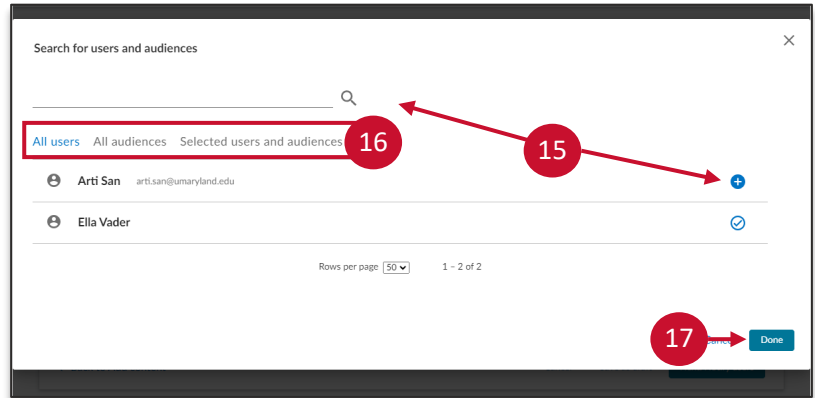
14. Select the **add users and audiences** button.

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

The screenshot shows the 'Create Assignment' page with a progress bar at the top. Step 3, 'Add users and audiences', is the active step. Below the progress bar, the 'Add users and audiences' section is highlighted. It contains the instruction: 'Choose who should receive this assignment. You can select individual users or audiences.' There are two buttons: 'Add users and audiences' and 'Bulk add individual users'. A red circle with the number '14' is pointing to the 'Add users and audiences' button. At the bottom, there are navigation buttons: 'Back to Add content', 'Cancel', 'Save as draft', and 'Next: Notify users'.

Manager's Guide: Assigning Training

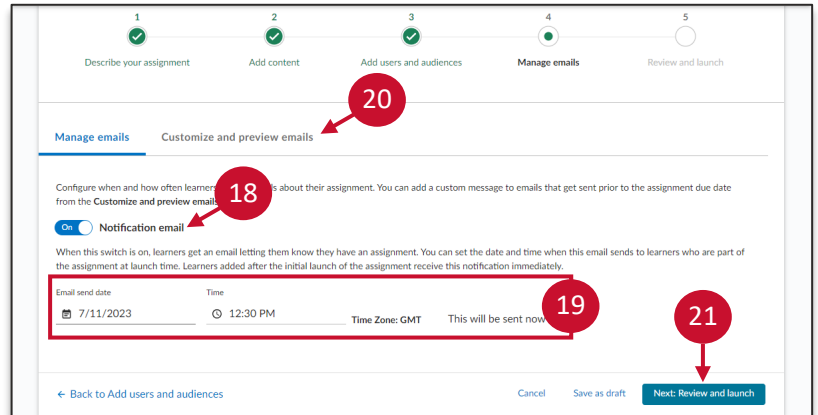
15. Use the **search bar** to search for users. Select the **plus symbol** to add to the assignment.
16. Use **Users** and **Audiences** tabs to filter results. Use the **Selected** tab to confirm selections.
17. Select the **Done** button.



Notify Users

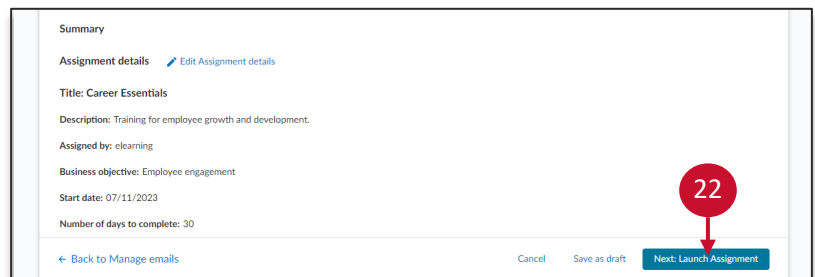
On the **Manage Emails** page:

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.

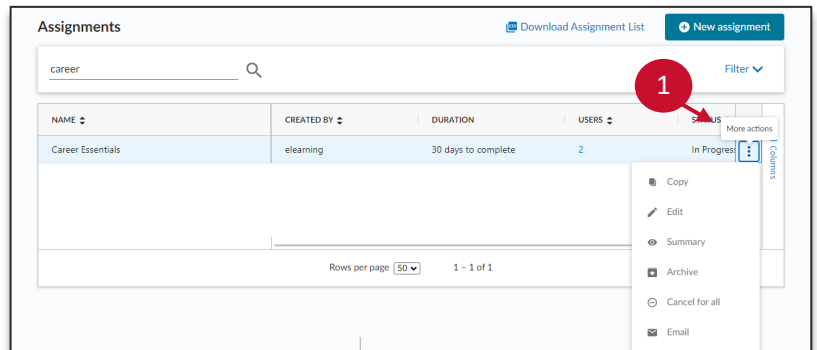


Edit an Assignment

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](#).