

LandrumHR Learn LMS

USER GUIDE

For Learning Administrators
August 2021



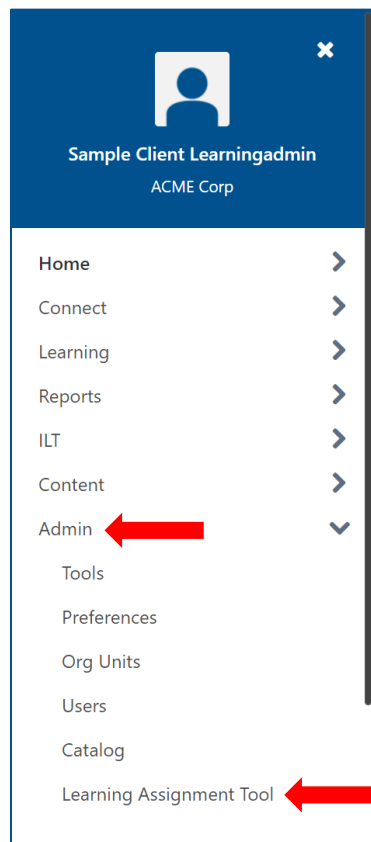
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Overview

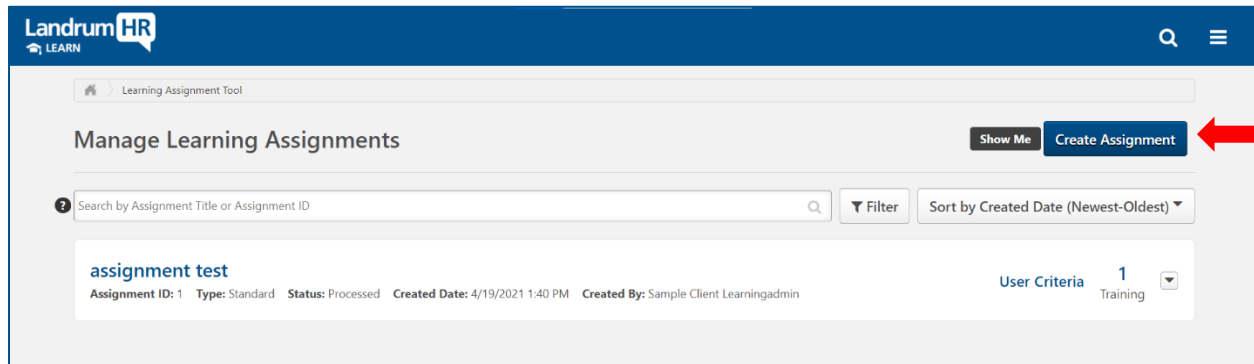
The **Learning Assignment Tool** allows administrators to easily create learning assignments and deliver training to users, organizational units (OUs) and groups. Administrators can assign training by creating a new Learning Assignment or by copying and editing a previous Learning Assignment. Administrators can track and manage assignments via the **Manage Assignments** page, and view data related to specific assignments via the **Assignment Summary** page, including deactivating a current Learning Assignment so it no longer continues to process and assign training to users.

To access the **Manage Learning Assignments** page, from the menu dropdown at the top right, go to [ADMIN > LEARNING ASSIGNMENT TOOL](#)

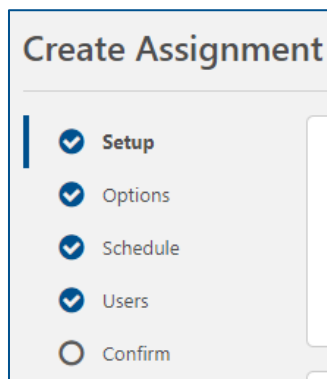


Create a New Learning Assignment

From the **Manage Learning Assignments** page, click the **Create Assignment** button to begin creating a new learning assignment.



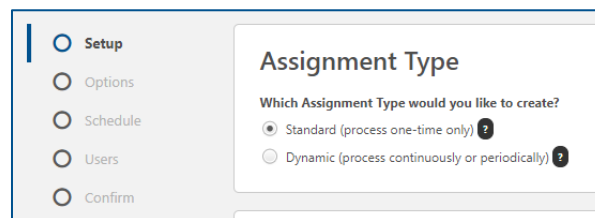
On the left-hand side of the page, all the steps in the Learning Assignment creation process display in a navigation panel with the current step in the process indicated with a vertical line. As each step is completed, a checkmark appears next to the step. You can click any completed step in the panel to return to that step and make changes.



Helpful Tip: The **Show Me** button at the top right of any tool wizard provides prompts and instructions for completing the current action.

Setup Section

1. Select one of the **Assignment Types**:
 - a. Choose **Standard** for assignments you only want to process once (for example, a one-off training assignment that you do not want repeated.)
 - b. **Dynamic** allows you to assign training to process multiple times depending on certain criteria (for example, use a Dynamic Assignment to assign New Hire training any time a new user is added to the system. You will only need to set this Dynamic Assignment once, and the system will automatically assign the training within the assignment each day to new users who meet the criteria you set.)



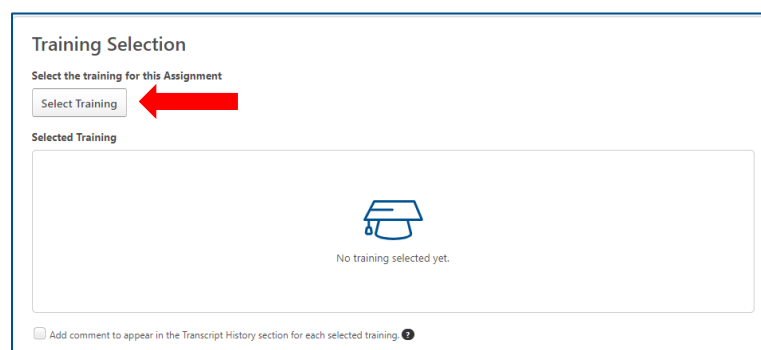
The screenshot shows a sidebar with navigation links: Setup (selected), Options, Schedule, Users, and Confirm. The main content area is titled "Assignment Type" and asks "Which Assignment Type would you like to create?". There are two radio button options: "Standard (process one-time only)" which is selected, and "Dynamic (process continuously or periodically)".

2. Enter a **Title** and a **Description**



The screenshot shows a form titled "General Information". It has two text input fields. The first is labeled "Assignment Title" with a required field icon and contains the text "i.e. Annual Compliance Training". The second is labeled "Assignment Description" and contains the text "i.e. Annual compliance training for HR Division."

3. Click **Select Training** to choose the training(s) you are assigning.



The screenshot shows a form titled "Training Selection". It has a section "Select the training for this Assignment" with a "Select Training" button. A red arrow points to this button. Below this is a section "Selected Training" which is currently empty and displays a message "No training selected yet." with a graduation cap icon. At the bottom, there is a checkbox labeled "Add comment to appear in the Transcript History section for each selected training."

4. **Search** for the trainings you would like to assign using the appropriate filters. Use the **checkboxes** to select the desired trainings. You can include any type of Learning Object, including Curricula, and as many trainings as necessary.

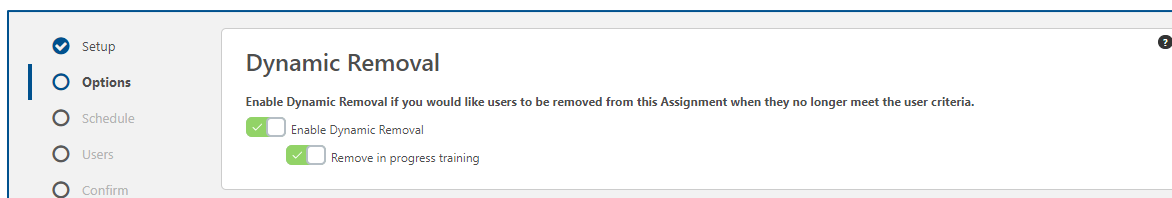
The screenshot shows a web interface for searching and filtering training assignments. At the top, there are two tabs: 'Search' (which is active) and 'Selected (0)'. Below the tabs is a search bar labeled 'Search by Training Title' with a magnifying glass icon and a 'Filter' button. The main area contains several filter sections: 'Training Types' with a dropdown menu showing '11 Training Types'; 'Course Code' with a text input field and a magnifying glass icon; 'Provider' with a 'Select Provider' button; 'Languages' with a dropdown menu showing 'English (US)'; 'Locator Number' with a text input field and a magnifying glass icon; 'Location' with a 'Select Location' button; and 'Description' with a text input field and a magnifying glass icon. At the bottom left is a 'Reset Filters' link, and at the bottom right is an 'Apply Filters' button.

5. Click the **Select** button to add the checked trainings to the Learning Assignment Tool.
6. Click **Next** to select the **Options** for how the trainings will be assigned, any prerequisites, and email settings.

Options Section

1. If **Dynamic Assignment Type** was selected in the previous menu, the **Dynamic Removal Options** appears.
 - a. Click the **Enable Dynamic Removal** slide button if you would like the assigned trainings to automatically be removed from user transcripts when they no longer meet the user criteria associated with the course.
 - b. Select **Remove in progress training** if you would like the training to be removed even if users have started but not completed a course.

Note: This option is typically used when trainings are assigned to a specific position, location, division, or other OU. If a user changes OUs and the training is no longer relevant to them, the trainings are automatically removed from their transcript.

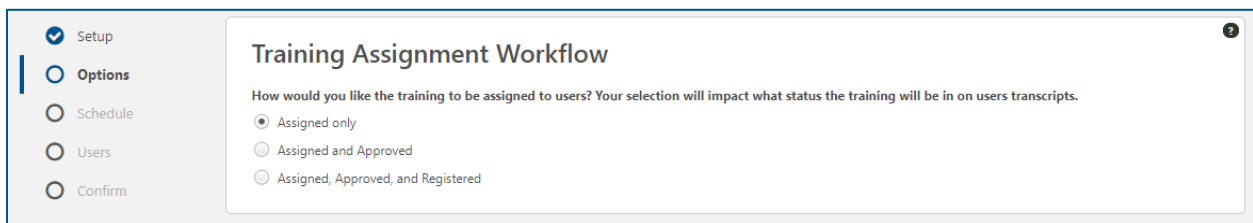


The screenshot shows a sidebar menu on the left with five items: Setup (checked), Options (selected), Schedule, Users, and Confirm. The main content area is titled "Dynamic Removal" and contains the following text: "Enable Dynamic Removal if you would like users to be removed from this Assignment when they no longer meet the user criteria." Below this text are two toggle switches: "Enable Dynamic Removal" (checked) and "Remove in progress training" (checked).

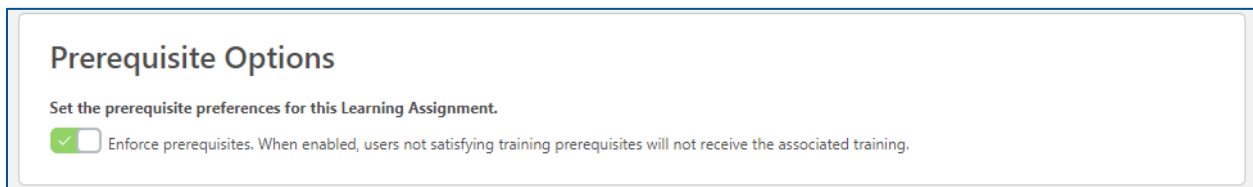
This option will not appear if **Standard Assignment Type** was selected in the previous menu.

2. Select the desired **Training Assignment Workflow**:
 - a. **Assigned Only:** If the users must still receive approval and register for the training.
 - b. **Assigned and Approved:** The training will be automatically approved, regardless of any system-configured approval workflows. The users will still be required to *Register* for the training.

- c. **Assigned, Approved, and Registered:** The training will be automatically *Approved* and *Registered*, regardless of any configured approval workflows. If selected, an additional option to bypass user payment appears:
- Bypass User Payment:** Enabling this option prevents users from being prompted to pay for training and will be placed on the users transcript.
 - Completed:** Only available when assigning a session which occurs in the past. The session will be added to users' transcripts in a status of Completed. If any other training items are being assigned with the session, this option is not available. **Note:** This is typically used for spontaneous trainings, or when the training completed by the user was not previously set up in the LMS prior to the user completing the training.



3. By default, the **Enforce Prerequisites** slide button is automatically selected. This forces users to complete any prerequisites for the trainings included in the assignment before being able to launch the selected trainings.



4. **Email Settings: Training Specific Emails** – **Send Register Training Emails** are the default and are already configured to automatically notify users when assigned new training, at 1 week prior to due date, and when trainings are past due. **This setting should not be changed.**

① No changes can be made to these email settings after the Assignment is submitted.

Email Settings

What email settings would you like to apply to this Assignment? ?

☒ Training Specific Emails

Send emails to users based on the email settings configured at the training level. You can review these email settings on the Confirm tab.

Send additional emails to notify users of training assignment or registration.

☐ Send Assign Training emails ?

☒ Send Register Training emails ?

☐ Custom Emails

Send custom emails to users for this Assignment. Any other emails configured at the training level (that are not displayed here) will continue to be sent to users.

☐ Ad-Hoc Email

Send an ad-hoc email to users each time this Assignment processes. This suppresses all emails configured at the training level.

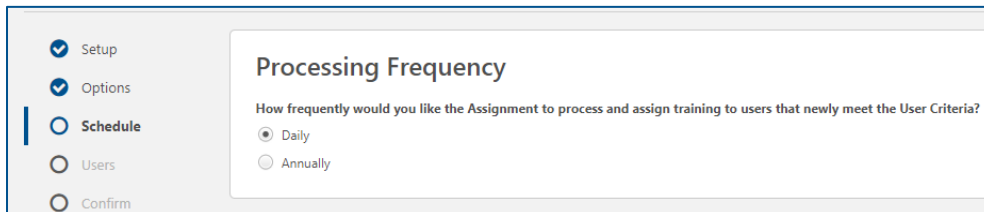
☐ No Emails

No emails will be sent to users.

5. Click **Next** to select the schedule when and how often the assignment should process.

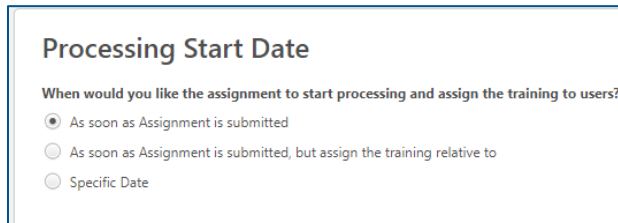
Schedule Section

1. For **Dynamic Assignments**, select the **Processing Frequency** for the Assignment:
 - a. **Daily:** The Assignment will process each day. Any new users who become eligible for the Assignment, such as New Hires or internal OU changes, will have the trainings automatically assigned to or removed from their transcript.
 - b. **Annually:** Any newly eligible users will only have the trainings assigned to them based on the **Processing Start Date** selected below.



The screenshot shows a sidebar with navigation links: Setup (checked), Options (checked), Schedule (selected), Users, and Confirm. The main content area is titled "Processing Frequency" and asks, "How frequently would you like the Assignment to process and assign training to users that newly meet the User Criteria?". There are two radio button options: "Daily" (selected) and "Annually".

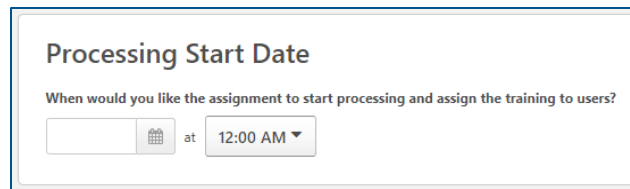
2. For **Dynamic OR Standard Assignments**, select the **Processing Start Date** depending on when you would like the Assignment to add the selected training to user transcripts.



The screenshot shows a box titled "Processing Start Date" with the question, "When would you like the assignment to start processing and assign the training to users?". There are three radio button options: "As soon as Assignment is submitted" (selected), "As soon as Assignment is submitted, but assign the training relative to", and "Specific Date".

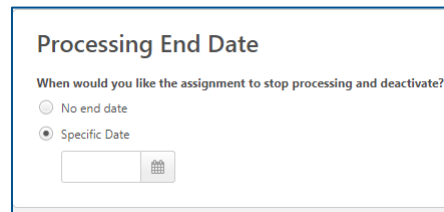
- a. For **Dynamic or Standard Assignments Processing Daily**, select "**As soon as Assignment is submitted**" if you would like to create the Assignment now, but postpone pushing the trainings to user transcripts to a later date, select the "**Specific Date**" radial and select the date you wish the Assignment to process and push to user transcripts.
- b. For **Dynamic Assignments processing Daily**, you have the additional option of choosing "**As soon as assignment is submitted but assign the training relative to**". This allows the Assignment to process as soon as it is submitted, but users will not see the training on their transcript until they have met the specified criteria.

- c. **Specific Date:** This option allows you to select a specific future date and time, at which point the assignment will process. This is useful when you are preparing an assignment for changing training needs that will not go into effect until a later date. (For example, you have been notified of changing State or Federal regulations going into effect January 1 of the next calendar year and would like to proactively set the learning Assignment now.) **This is the only option available for Dynamic Assignments processing Annually.**



The form is titled "Processing Start Date" and asks "When would you like the assignment to start processing and assign the training to users?". It features a date selection field with a calendar icon, followed by the word "at", and a time selection dropdown menu currently set to "12:00 AM".

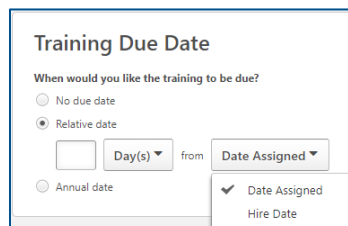
3. Select the **Processing End Date:**



The form is titled "Processing End Date" and asks "When would you like the assignment to stop processing and deactivate?". It has two radio button options: "No end date" and "Specific Date". The "Specific Date" option is selected, and there is a date selection field with a calendar icon next to it.

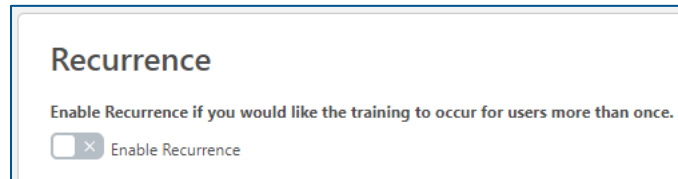
4. Select the **Training Due Date:**

- a. **No due date:** Select this option if the training has no specific deadline and users may complete it at their leisure.
- b. **Relative date:** This option allows you to set a due date relative to a specific reference point. For example, 14 days after the training is assigned, or after a New Hire's start date.
- c. **Annual date:** Select this option for trainings due on a particular date each year.



The form is titled "Training Due Date" and asks "When would you like the training to be due?". It has three radio button options: "No due date", "Relative date", and "Annual date". The "Relative date" option is selected. Below the radio buttons, there is a field for a number of days, a "Day(s)" dropdown, and a "from" label. To the right is a dropdown menu for the reference date, currently set to "Date Assigned". A second dropdown menu is open, showing "Date Assigned" (which is checked) and "Hire Date".

5. Click the **Enable Recurrence** slide button if you would like the training to appear on user transcripts more than once. Select this option for any training required to be completed more than once such as any monthly, quarterly, annual training, etc. Leaving this unselected prevents trainings from being reassigned to users who have already completed it.

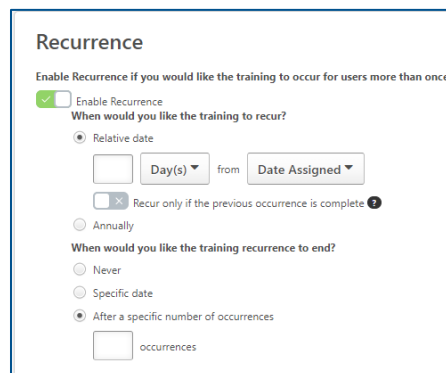


Recurrence

Enable Recurrence if you would like the training to occur for users more than once.

☐ Enable Recurrence

- a. Selecting this opens additional options allowing you to specify when you would like the training to recur, based on a Relative Date or Annual Date. You are also prompted to choose when you would like the recurrence to end.



Recurrence

Enable Recurrence if you would like the training to occur for users more than once.

☒ Enable Recurrence

When would you like the training to recur?

☒ Relative date

Day(s) from Date Assigned

☐ Recur only if the previous occurrence is complete

☐ Annually

When would you like the training recurrence to end?

☐ Never

☐ Specific date

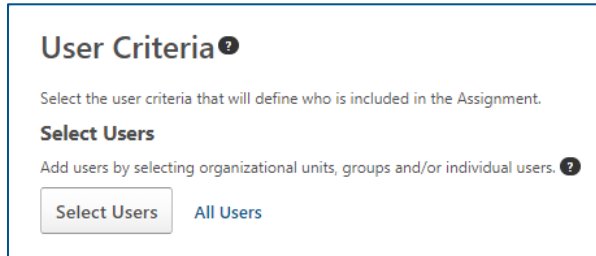
☒ After a specific number of occurrences

occurrences

6. Click **Next** to select the Users or User Criteria who will be assigned the training.

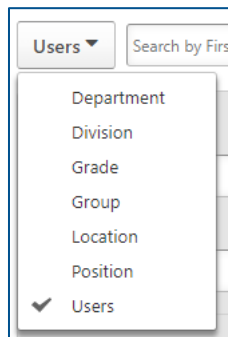
Users Section

1. Users can be selected in several ways. Click “**All Users**” to assign the training to all users.



The screenshot shows a box titled "User Criteria" with a help icon. Below the title is the instruction "Select the user criteria that will define who is included in the Assignment." Underneath is the section "Select Users" with the instruction "Add users by selecting organizational units, groups and/or individual users." At the bottom are two buttons: "Select Users" and "All Users".

2. Click the **Select Users** button to select **individual users**, a **specific OU**, or **Group**.
 - a. **Individual users** can be selected by searching for their **First and/or Last Name**, **User ID**, or **Username** (same as User ID).
 - b. Training can be assigned to **any or all direct reports** of a certain **Manager** by entering the **Manager's First and/or Last Name**.
 - c. Training can also be assigned based on other **Organizational Units (OUs)** from the dropdown menu:



The screenshot shows a dropdown menu with the label "Users" and a search box "Search by First". The menu is open, showing a list of options: Department, Division, Grade, Group, Location, Position, and Users. The "Users" option is selected, indicated by a checkmark.

- d. To assign training based on more than ONE Organizational Unit, you must first create a **Group** based on the desired OUs, then select the Group from this menu.

3. If you have a list of users that need to be assigned this training, you can upload a .csv file by clicking the **Select File** button.

Upload Users
Add users by uploading files with their Username, User ID or Email Address in the .csv format. Each file can have a maximum of 2000 users.

4. Click the **Enable Assign New Occurrence** slide button to assign a new occurrence of the training to users who already have it on their transcript. Using the additional options, you can determine if you would like to reset any saved progress, or only assign a new occurrence of the training to users with a “Completed” status.

Assign New Occurrence
Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained.
☒ Enable Assign New Occurrence ?
☐ Only assign new occurrence to users in the 'Completed' status ?
☐ If applicable, override all prior due dates for trainings contained in this assignment. ?

5. Select **Next** to review your settings and submit the Learning Assignment.

Confirm Section:

1. Review all the settings you have configured by selecting the down arrows to the right of each section. Once ready, click **Submit**.

Create Assignment Show Me

☒ Setup
☒ Options
☒ Schedule
☒ Users
☐ **Confirm**

Demo

Setup 3 Training ▼

Options ⓘ
Type: Standard Training Assignment Workflow: Assigned only Emails: Training Specific Emails ▼

Schedule ▼
Processing Start Date: As soon as Assignment is submitted Due Date: No due date

Users 1 Users ▼
Assign New Occurrence: Off

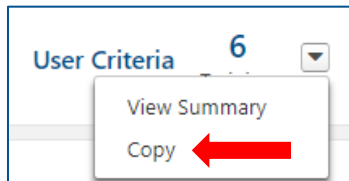
Cancel Save Draft ? Previous **Submit**

2. You will be prompted to confirm your decision. Click **Yes** to confirm or **No** to go back.

Copy a Learning Assignment

Rather than creating a new learning assignment from scratch, you can copy a previous learning assignment that has a very similar structure.

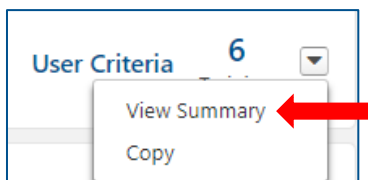
1. Click the down arrow button to the right of the assignment you would like to use as your template.
2. Select "Copy"



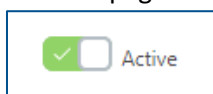
3. Move through the sections as detailed above in the **Create Assignment** section, editing the parameters of the copied assignment as needed.

Deactivate Current Learning Assignment

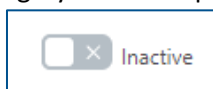
1. From the **Manage Learning Assignments** page, click the **down arrow** button to the right of the assignment you would like to deactivate.
2. Select **"View Summary"**



3. To deactivate a Learning Assignment and prevent it from continuing to process, click the green **"Active"** slide button at the top right of the page.



4. The green checkmark will become a grey 'x' and display as **"Inactive"**.



The assignment can be returned to **Active** status at any time by repeating the above steps.