Assign Learning

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Assigning learning - introduction

For Users to participate in the learning and assessment available in the CLS they need to be enrolled in Catalogue Item(s) and hence, assigned learning. The process involves:

- The learning content, i.e. the Catalogue Item(s) involved
- The recipients, i.e. the Users to be enrolled
- The delivery options, i.e. enrol now or in the future

This process can be done manually by assigning learning directly to selected Users from within a particular Catalogue Item, see Assign Learning – Catalogue Item. It can also be done by uploading a spreadsheet of Enrolment data containing lists of Catalogue Items, Users, Status, and so on, see Import Learning History. Alternatively you can use **Assign Learning**, a wizard that create Enrolments semi-automatically. Using the wizard you are presented with a series of screens and you fill them in to nominate when and how learning will be delivered and to whom.

Once User Enrolments have been added to the CLS, they can be inspected and edited in the **Enrolments** section of the CLS, see Enrolments.

Note that a Catalogue Item that contains more than one Learning Asset becomes known as a Program but remains functionally the same (see Catalogue Items). Thus, references to Catalogue Items here also include Programs.

Assign Learning

Assign learning is a wizard, i.e. a setup assistant that offers authorised Users a series of dialog boxes to complete the steps required to enrol learner Users in Catalogue Item(s) and schedule the enrolment process (e.g. enrol now or in the future). You can select multiple items for Users to enrol in and select multiple Users and groups to be enrolled. Note that the learning material must have been created prior to running the wizard.

To assign learning via this wizard select **Manage Learning > Assign Learning**.

Step 1 Content

Display the Catalogue Items that you want to enrol Users by:

- Clicking **Search for content or tags** and entering search parameters, or
- Clicking **Search**

Note: Content can also be categorised by assigning tags to the Catalogue Items. If Tag items are displayed and selected the wizard can display Catalogue Items associated with the Tag.

- Click a Catalogue Item and then click the plus icon at its right to add it. It will then be listed under **Added Content**.
- Repeat and add items as required.
- You can delete an item by clicking the minus icon next to it

Click **Next**

NOTE: If tag items are displayed and selected you will enrol user/s in catalogue items associated with the tag.

Step 2 Recipients

Display the Users who you are enrolling:

- Click **Search for users or groups** and enter search parameters, or Click **Search**

To add a User or Group

- Click the User or Group and then click the plus icon at its right. It will then be listed under **Added Content**.
- Repeat and add Users or Groups as required.
- You can delete a User or Group by clicking the minus icon next to it
- Repeat and add Users/Groups as required.
- Click **Next**

Step 3 Delivery

This screen has four areas where you can enter further information about Enrolment delivery. If desired, click the arrow next to each heading to enter this information.

When do you want to deliver the enrolments?

Click the check box to choose between

- Deliver the Enrolment immediately
- Deliver at the following time. This opens date and time pickers including time zone support

Click the check box to if you want to send email notification to recipients

Note that you can always change the scheduled delivery time before the campaign is sent.

Do you want to add a due date?

If you add one then Users will need to complete the learning by this date. Click a check box to choose between

- **No Due Date**
- **Due Date is after a period** means that a time frame can be set from the time the learner enrols. For example 3 months from the enrolment date.
- **Absolute Due date** means that a date can be selected using a date picker. No matter what the enrolment date is, the learning must be complete on this date.

What is the validity and re-enrol duration

Automatically re-enrol these Users in these courses at your chosen interval. This can be set in as a certain number of days, weeks or months.

- **Valid For** allows you to set the time the learning will stay valid before it expires. An example of a type of learning that may expire is **First Aid**. The learning could be set to expire in 2 years after which the learner must repeat the learning.
- **And will re-enrol** allows you to automatically trigger the learner to be re-enrolled in the learning at a certain time i.e. a week before the expiry of the First Aid course. This is an optional setting.

Should the enrolments automatically enrol new users in these groups

If any Groups were selected in step 1, there will be a check box next to each Group here. If you click a check box, this will enrol any new Users who subsequently join that Group.

Click **Next**.

Assign Learning

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③ Step 3 - Define Delivery

⌄ When do you want to deliver the enrolments?
You can always change the scheduled delivery time before the campaign is sent.

● Deliver the enrolment immediately

Your campaign will be queued on our delivery service and sent to your recipients immediately.

○ Deliver at the following time

You can always change the scheduled delivery time before the campaign is sent.

☑ Send Email Notification to recipients

⌄ Do you want to add a due date?
These users will need to complete the learning by this date.

● No Due Date

○ Due date after a period

[ ] (None) ▾

○ Absolute Due date

[   ] 🗓

⌄ What is the validity and re-enrol duration?
Automatically re-enrol these users in these courses at your chosen interval.

Valid For [   ] (None) ▾ **and will re-enrol in** [   ] (None) ▾

⌄ Should the enrolments automatically enrol new users in these groups?
When new users get added to the checked groups below, they will be assigned these courses.

No groups were selected in Step 2.

◯ Back   **Next** ➲

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Step 4 Review

In the last step you are presented with a summary page of Enrolment details for you to check before clicking **Finish**.

Note that if there is a charge for the course the User will be presented with a payment portal as part of the enrolment process.

Assign Learning – Catalogue Item

Learning can be assigned to Users using various methods, see Assigning learning - introduction.

This method creates a link between a Catalogue Item and Enrolled Users.

- Select **Manage Learning** from the main menu
- Select **Manage Catalogue** (left menu)
- Select the Catalogue Item you want to enrol the user in

- Select the **Enrolled Users** link

- This takes you to the **Enrolments** section of the CLS. Click **Enrol**

- Select **User** in the top drop-down list, then search for the user you want to add in the second drop-down

- Select the User and click **Add**

- The User is now enrolled in this Catalogue Item.
- You can go back and select another User in the top drop-down list and hence add multiple Users.
- Note that instead of a User, you can also select Organisations, Organisation Units or Groups and then choose from the second drop-down list appropriately. This makes it possible to enrol more than one person at a time.