

How to: Assign induction(s)

This is a how-to guide on assigning induction(s) to a user in the AUT Events Induction Portal.

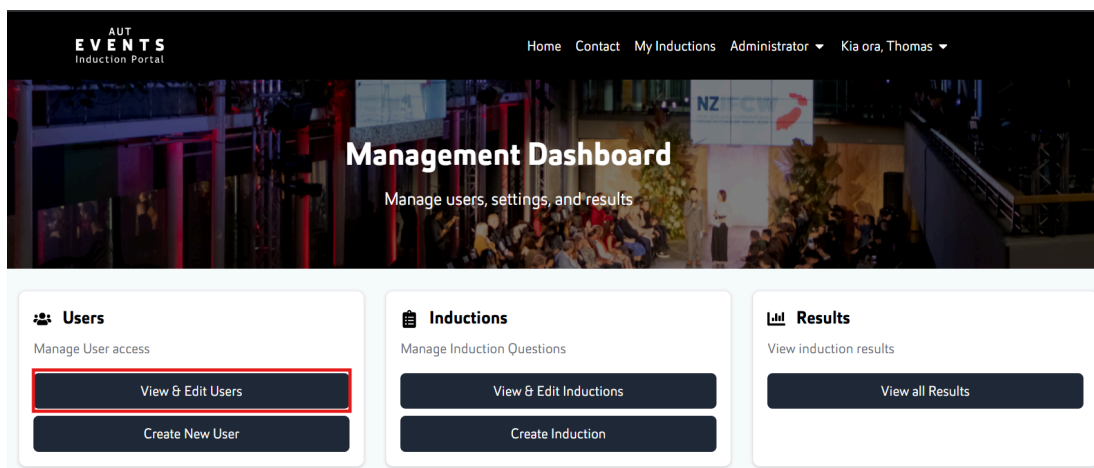
Manager or Administrator access required

Last updated by Thomas on 23/04/25. V1.1

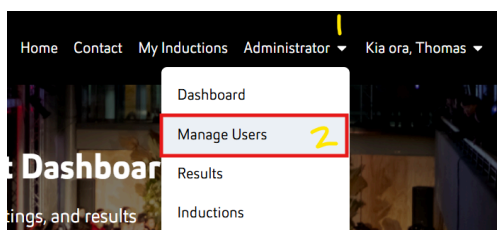
1. Select a user

1.2. Navigate to the View Users page

Use the "View & Edit Users" button from the management dashboard on the Users card, or use the navigation page dropdown and "Manage users"



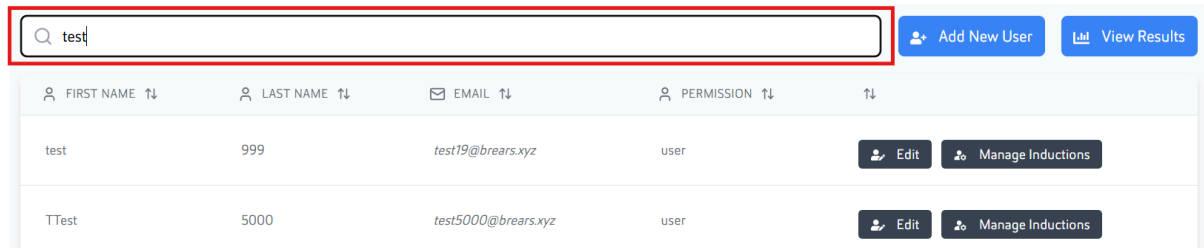
OR



NOTE: For administrators, this dropdown text in the navigation is called Administrator, and for Managers, it is called Manager

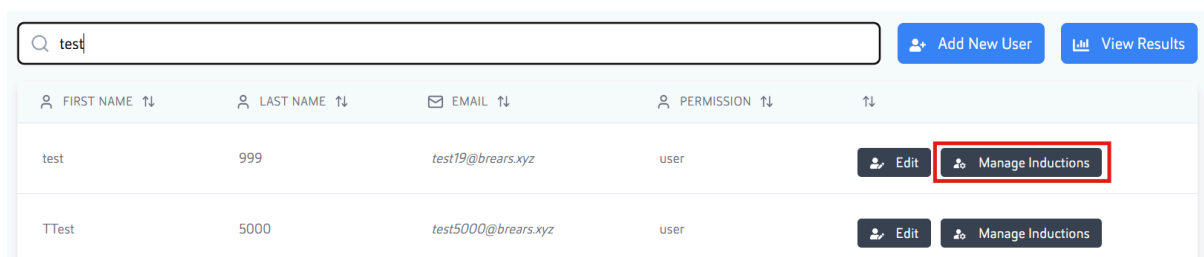
1.2. Search the user you would like to assign an induction to

On the View users page, using the search bar, search the users by email or name (first OR last name) to refine the results



1.3. Click the "Manage Assignments" button of the user

Find the user you would like to make induction assignments to and click "Manage Inductions" to be directed to the manage assignments page for the selected staff member.



You will now be taken to the Manage Assignments page.

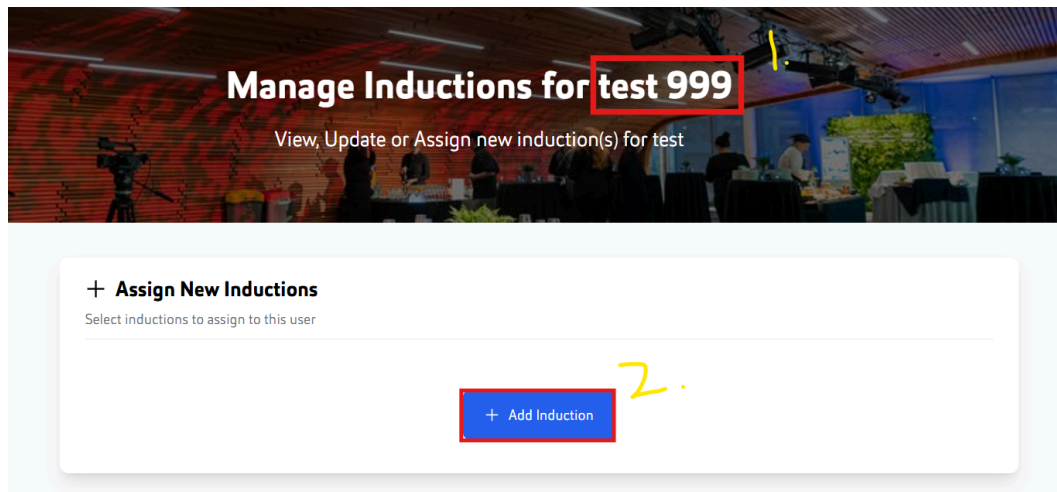
On the manage induction assignments page, you are able to add new induction assignments or view and manage existing assignments.

2. Add Induction Assignment

2.1. Confirm name and click "Add Induction"

First, confirm the name is correct and is the user you would like to assign an induction to.

Secondly, click the blue "Add Induction" button to add an assignment card.



2.2. Induction card Overview

You should see an induction assignment card appear after you click "Add Induction" from step 2.1

Here are the details of the assignment card:

1. **Search Induction:** Search for an induction based on the induction's name
(**NOTE:** Only inductions that can be assigned will show in the search results. Draft inductions or those already assigned and not complete will not appear in the search.)
2. **Browse all inductions:** Click the "Browse All" button to open a pop-up where you can view all inductions and also search by induction name, its description or department.
(**NOTE:** Draft inductions or those already assigned and not complete will be shown in the browse all, but cannot be selected as they are unavailable to be assigned)
3. **Available from and due date selection:** Click the first date field, and the first selected date will be the Available from date. The second chosen date will be the due date.

(Staff will not be able to start or complete the induction until the Available from date has been reached.)

(After the due date has been reached, the induction will be marked as overdue; however, it can still be completed.)

4. **Add another induction card:** If you would like to add another induction assignment for this user, click the "Add Another Induction" button (located at the bottom left of the section). This will add another induction card like the first, where you can add another induction assignment.

5. **Save induction assignments:** Once you have selected the inductions and their available from and due dates, you may click the blue "Save Assignments" button to assign the inductions to the user.

(NOTE: The user will receive an email notification for the new induction(s) assignments)

6. **Remove induction card:** Clicking the "Remove" button (located top right of the card) will remove the assignment card for the induction it is located within.

(NOTE: Once removed, this CANNOT be undone)

The screenshot shows a web interface titled '+ Assign New Inductions' with the subtitle 'Select inductions to assign to this user'. It features a card titled '1 Induction Assignment' with a 'Remove' button in the top right corner. Inside the card, there is a 'Select Induction *' section with a search bar (callout 1) and a 'Browse All' button (callout 2). Below this is an 'Available From & Due Date *' section with a date range '23-04-2025' to '23-04-2025' (callout 3). At the bottom of the card is an '+ Add Another Induction' button (callout 4). To the right of the card is a blue 'Save Assignments' button (callout 5).

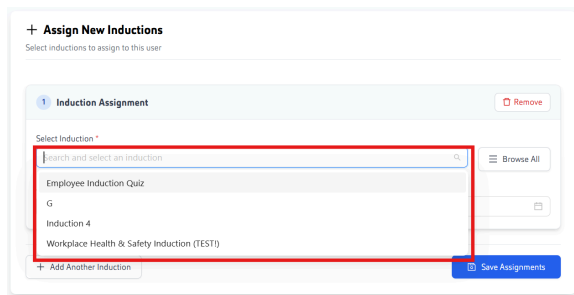
Here are those steps in more detail.

2.3. Select the Induction

Click on the induction you would like to add using one of the following two methods

2.3.1. Select using the search bar (#1 from 2.2)

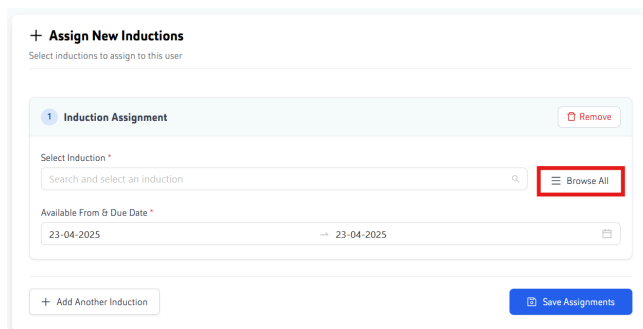
You can search for an induction based on the induction's name by clicking the search bar and typing in the induction name



NOTE: Only inductions that can be assigned will show in the search results. Draft inductions or those already assigned and not complete will not appear as they are unavailable to be selected.

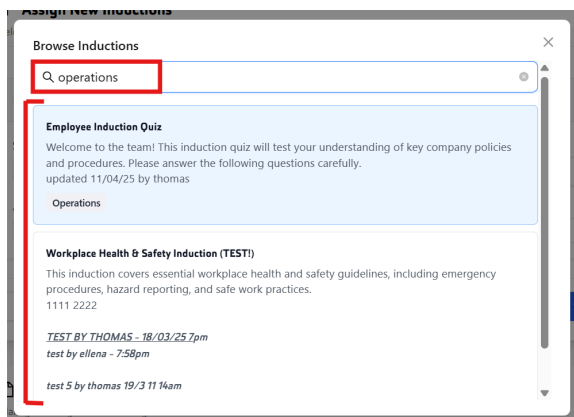
2.3.2. Select using the browse all pop-up (#2 from 2.2)

To view all inductions, along with their Name, Description and Department, Click the "Browse All" button.



The "Browse All" button will open up this pop-up to view inductions with more details.

You can search for an induction in this search bar by the Induction's Name, its description or department. All relevant search results will be displayed here. To reset the search and view all inductions, simply remove all search queries.



NOTE: Draft inductions or those already assigned and not complete will be shown here, but cannot be selected as they are unavailable to be assigned

2.4 Select Available From and Due Dates

After selecting an induction, you must select an available from and due date.

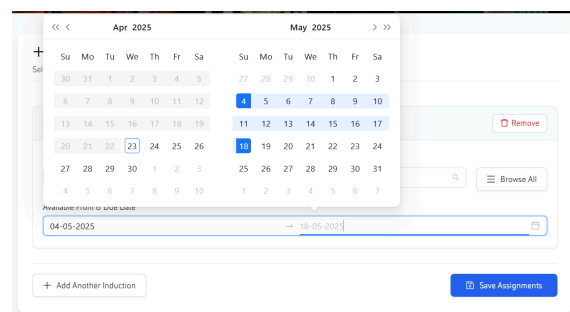
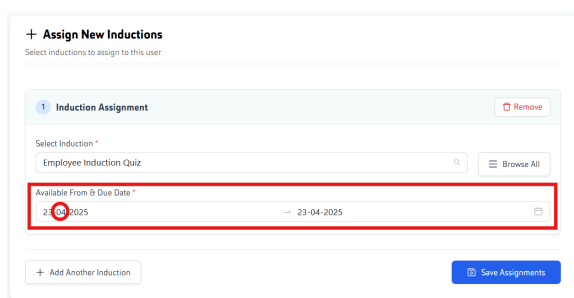
Click the first date field, and select the two dates in order (Available from THEN due date).

The first date selected will be the Available from date.

The second date selected will be the due date.

First, click the first date to open the date selector.

Then you can select the Available from THEN the due date



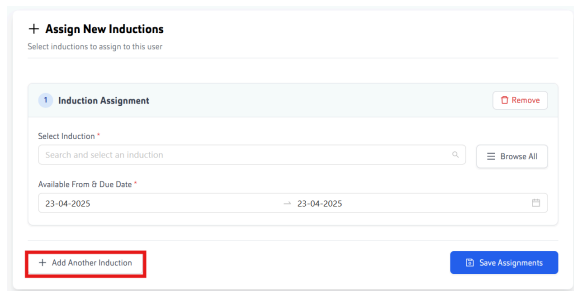
NOTES:

Staff will not be able to start or complete the induction until the Available from date has been reached.

After the due date has been reached, the induction will be marked as overdue; however, it can still be completed.

2.5 Add another induction (Optional)

If you would like to add another induction assignment for this user, click the "Add Another Induction" button (located at the bottom left of the section). This will add another induction card like the first, where you can add another induction assignment and repeat the steps above



+ Assign New Inductions
Select inductions to assign to this user

1 Induction Assignment Remove

Select Induction *

Search and select an induction Browse All

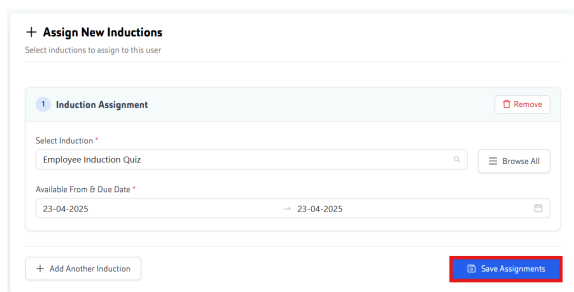
Available From & Due Date *

23-04-2025 → 23-04-2025

+ Add Another Induction Save Assignments

2.6 Submit & Save induction assignments

Once you have selected the inductions, their available from date and due date, you may click the blue "Save Assignments" button to assign the inductions to the user.



+ Assign New Inductions
Select inductions to assign to this user

1 Induction Assignment Remove

Select Induction *

Employee Induction Quiz Browse All

Available From & Due Date *

23-04-2025 → 23-04-2025

+ Add Another Induction Save Assignments

NOTE: The user will receive an email notification with the details of the new induction assignment

You now know how to assign an induction to a user :)

If you would like to learn how to assign a new induction, we also have a guide available for this

AUT EVENTS Induction Portal