Employee Documentation

Job Aid: Assign Courses in Success Center

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Version: 3

DOCUMENT OVERVIEW:

Assign Courses in Success Center is the process an employee follows to assign themselves or other users into Success Center courses.

TIPS AND TRICKS:

Special security is granted to staff who have the responsibility to assign training to others. If you do not have the correct security access, contact your supervisor and ask them to complete the Success Center Security request form to request access.

STEP-BY-STEP PROCEDURE:

1. Open the **Success Center** and log in.

2. Hover over the **Admin** tab, then select **Learning Assignment Tool**.

3. Click on the **Create Assignment** button.

4. Under *Assignment Type*, select which assignment type you would like to create.

5. In the *Assignment Title* field, enter the assignment title.

6. In the *Assignment Description* field, enter the assignment description.

Note: The *Assignment Description* is not a required field.

7. Click on the **Select Training** button.

8. Enter the course code in the search box and press the **Enter** key.

9. Check the checkbox to the left of the course.

Note: If you have multiple courses, continue to enter the course codes and check the checkbox to the left of the course.

10. If you are assigning a *Computer Based Training* and do not need to select a specific session for your event skip to step 12. If you do need to select a specific session for your *Instructor Lead Training* event click the arrow button to the right of the course.

11. From the list of available sessions, check the checkbox to the left of the specific session.

12. Click **Select.**

Note: Warnings give you additional information about the selected course.

13. Verify the correct course is showing in the *Training Selection* section and click **Next**.

14. Under the *Training Assignment Workflow,* select **Assigned, Approved, and Registered**.

Note: The *Assigned only* and *Assigned and Approved* only puts the course on the user's transcript, but does not register the user for the session. The user would need to log into their transcript and register themselves for training.

15. Under *Email Settings*, select the email settings you would like to apply to the assignment.

16. Click **Next**.

17. Select the processing start date under the *Processing Start Date* section.

18. Select the due date under the *Training Due Date* selection.

Note: If you selected a specific session within the event you will not need to select a specific due date.

19. Click **Next**.

20. There are two ways to assign users to the course, select individual users or upload a batch of users from a file:

- **Select individual users**
  - Click **Select Users**
  - Enter the users name in the search box and press the Enter key.
  - Check the checkbox to the left of the user's name.
  - Repeat step for each user.
  - After all user have been selected click **Select**.

- **Upload a batch of users from a file**
  - Click **Select File**.
  - Follow the prompts to locate and upload your file.
  - Click **Upload File**.
  - Click **Select**.

21. If the user needs to take the same course again, select **Enable Assign New Occurrence** under *Assign New Occurrence* section.

Note: This option would only be available for the *Computer Based Training* courses.

22. Click **Next**.

23. Review the information you have selected.

Note: If you need to make a change to any selections, use the tabs in the upper left hand corner to navigate. After you have made the changes, click **Next** until you get back to the summary page.

24. Click **Submit**.

25. Click **Yes.**