




### Dynamic Learning Assignment

The Learning Assignment Tool is used to assign training to specific users, organizational units or groups. A dynamic learning assignment processes daily or one time per year.

 Dynamic assignment settings that can be edited after submission are Assignment Title, Assignment Description, Email Settings, Removal Settings, Re-assignment Settings, Due Date, and Maintain Progress (when assign new occurrence was set to on).

1. From the **Menu** select **Admin > Learning Assignment Tool**. Select the **Create Assignment** button. Select the **Dynamic** option.
2. Enter an **Assignment Title**. For example, "Agency New Hire Curriculum."
3. Enter an **Assignment Description** (optional). For example, the purpose of training (annual, new hire, reassignment), the due date, and why the assignment is mandatory.
4. Use the **Select Training** button to add training to the assignment.
5. Select the **Add comment** (optional) checkbox to add a transcript comment.
6. Select the **Next** button to continue.
7. Select **Enable Dynamic Removal** to allow training (in certain statuses) to be automatically removed from users' transcripts when the user no longer meets the user criteria. When dynamic removal is enabled, additional options may include:
  - Toggle the **Remove In Progress Training** option on to remove training from users' transcripts that has already been started, in addition to training that has not been started.
  - Toggle the **Remove Training within Curricula** option on to remove all child learning objects from a curriculum assignment in addition to the curriculum.
8. Training Assignment Workflow:
  - Select **Assigned Only** when you do not want to bypass required approvals.
  - Select **Assigned and Approved** to automatically approve the training. Users will need to register for training if applicable.
  - Select **Assigned, Approved, and Registered** to automatically approve and register training.
9. When training has a prerequisite, select **Enforce Prerequisites** to apply to everyone assigned the training. Leave this option unchecked to bypass prerequisites.
10. Email Settings:
  - Select **Training Specific Emails** to use the email setting configured at the course catalog level.
    - Select **Send Assign Training emails** to send the assign training email to users for the following learning object types: online course, quick course, library, posting, curriculum, test, video, or material.

**Commented [PS1]:** Changed "DOA" to "Agency" to keep newbies from being inspired to make mistakes.


**Commented [NW2]:** Some of this repeats the standard assignment. Not sure if we should repeat everything or shorten it up




## Create a Dynamic Learning Assignment




- Select **Send Register Training emails** to send the register training email to users for ILT sessions.
  - Select **Custom Emails** to configure a unique set of custom emails for this learning assignment only.
  - Select **Ad-Hoc Email** to create a one-time email that will be sent when the learning assignment is processed. Note: This suppresses all emails configured at the training level.
  - Select **No Emails** to suppress all emails.
11. Curricula with Auto-Registration:
- The **Send Register Training emails** toggle is off by default. This prevents the system from sending a registration email to users for each training contained within the curriculum.
12. Processing Frequency:
- **Daily** - Selecting this button causes the learning assignment to process daily and assign training to any new users who meet the assignment criteria.
  - **Annually** - Selecting this button causes the learning assignment to process one time per year.

 You can schedule your daily dynamic learning assignments to run each morning after the nightly data feed file has been processed.

13. Processing Start Date:
- Select the **As soon as Assignment is submitted** to run the assignment immediately.
  - Select the **As soon as Assignment is submitted, but assign the training relative to**, to run immediately, but not allow users to see the training on their transcript until they have met the criteria.
    - Relative criteria and a time picker appear. Set the number of days, months, or years after the selected reference point the training should be assigned.
  - Select the **Specific date** button to select a future date and time.

 Learning assignments involving more than 1,000 users, or the assignment of a large curriculum, may take a long time to process. It is strongly recommended to schedule these types of assignments to run in the evening or overnight hours.

 When assigning a large curriculum to a high number of users, the assignment may take longer to process because it must process every child LO inside the curriculum against each user's transcript.

14. Processing End Date:
- **No End Date** - Select this option when the assignment should not end automatically. The assignment will continue processing (daily or annually) until it is manually deactivated by an administrator.



## Create a Dynamic Learning Assignment



- **Specific Date** - Select this option to select a specific date on which the assignment will end.
15. Training Due Date:
- Select **No due date** if no due date is necessary.
  - Select **Relative date** to select the number of Days, Months, or Years from the date of the learning assignment, or from another date such as Supervisor Effective Date.
  - Select **Annual date** to select a date for an annual assignment.
16. Toggle the **Enable Recurrence** option on to have the assignment recur on a relative date or an annual date.
- Select an option **Never**, **Specific Date**, or **After a specific number of occurrences** to determine when the recurrence should end.
17. User Criteria:
- Use the **Select Users** button to select the organizational units, groups and/or individual users that are included in the initial assignment.
18. Select the **Enable Assign New Occurrence** toggle to assign training to users who already have it on their transcript. When this is enabled, additional options include:
- Only assign new occurrence to users in the 'Completed' status.
  - Maintain Progress.
  - If applicable, override all prior due dates for trainings contained in this assignment.
19. Next, select the **Generate Initial User List** button to preview a list of users and their training status.
20. If needed, you may revisit and change your selections in the Setup, Options and Schedule sections. If you change anything, you must select the **Reset Initial User List** button.
21. After configuring and reviewing your user list, select the **Next** button to continue.
22. On the Confirm step, review your assignment one last time. Use the **Submit** button to submit the assignment for processing.

**Commented [PS3]:** I think it would be a benefit to cover the "Only assign new..." "Maintain Progress", and "If Applicable..." descriptions here.

**Commented [PS4R3]:** Those descriptions are here:  
[https://help.csod.com/help/csod\\_0/Content/Learning\\_Assignment\\_Tool/Create\\_Learning\\_Assignment/Create\\_Learning\\_Assignment\\_-\\_Users.htm](https://help.csod.com/help/csod_0/Content/Learning_Assignment_Tool/Create_Learning_Assignment/Create_Learning_Assignment_-_Users.htm)