

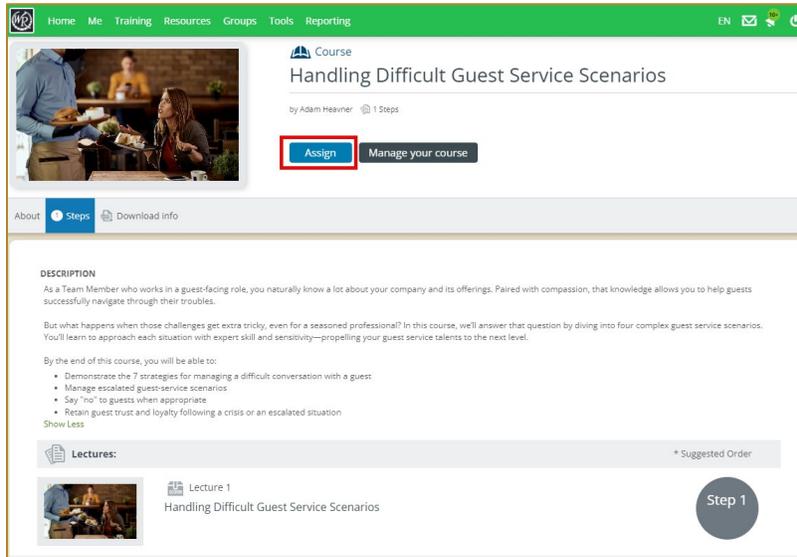


## Assigning a Course to a Team Member

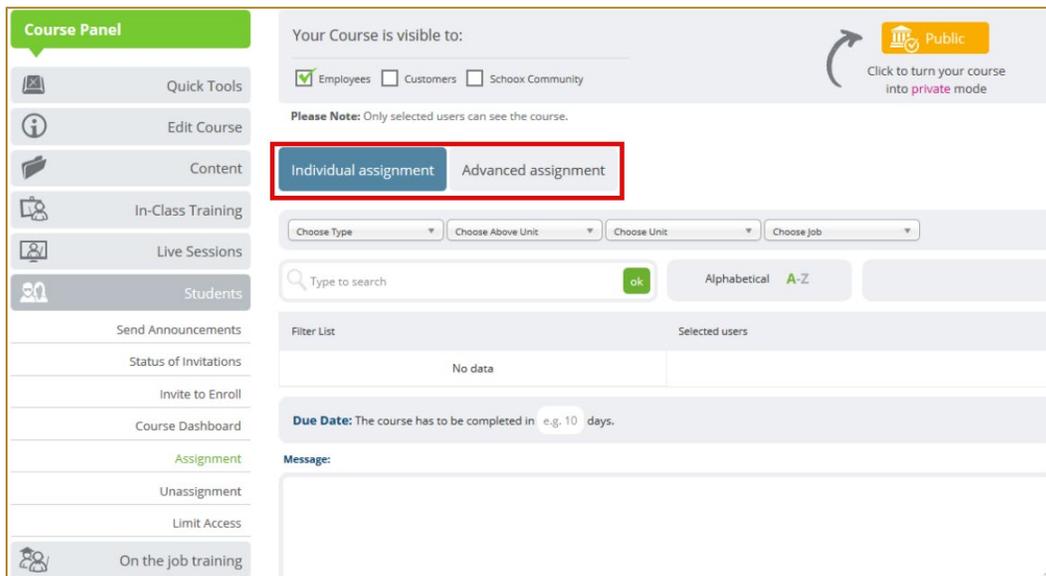
You have two different options for assigning courses to Team Members:

1. Assign courses to specific Team Members individually
2. Assign courses to a group of Team Members

The easiest way to assign a course to Team Members is to navigate to the desired course and click the blue Assign button.



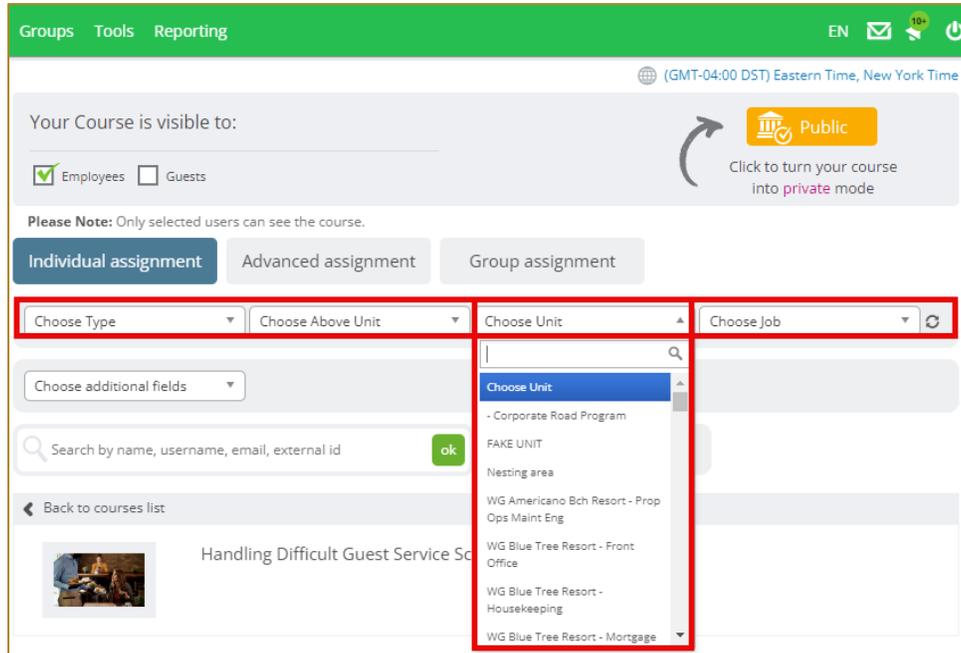
The Course Panel will open, and you will be given the option to assign the course either to specific Team Members (Individual Assignment) or to a group of Team Members based on their job and location (Advanced Assignment).





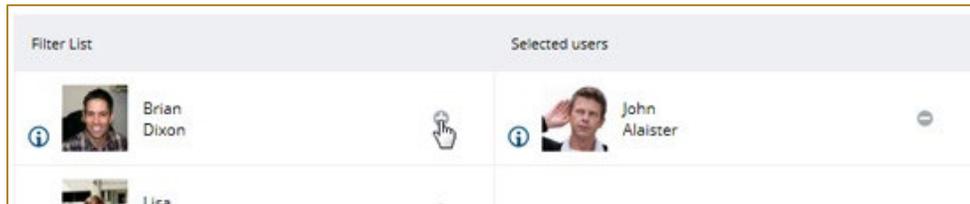
## Assign a Course Directly to a Team Member

You can find individuals more easily using the search field and drop-down filter menus. Filters include business units and jobs.



To assign an individual to this course, click the Plus symbol next to their name in the left-hand column. Their name will then appear in the right-hand Selected column.

To remove an individual from the list, click the Minus symbol.



After selecting the desired individuals, you can give them a due date by typing in either the number of days in which they must complete the course or a specific date by which the course needs to be completed. Please note that in both cases, the due date is being defined based on the logged-in user's (assignor's) preferred time zone.

Once you add value to the due date field, you will be able to see an extra checkbox titled "Unassign users once the due date is missed". Once selected, each user who is included in this assignment should be automatically unassigned from the course once the due date passes.

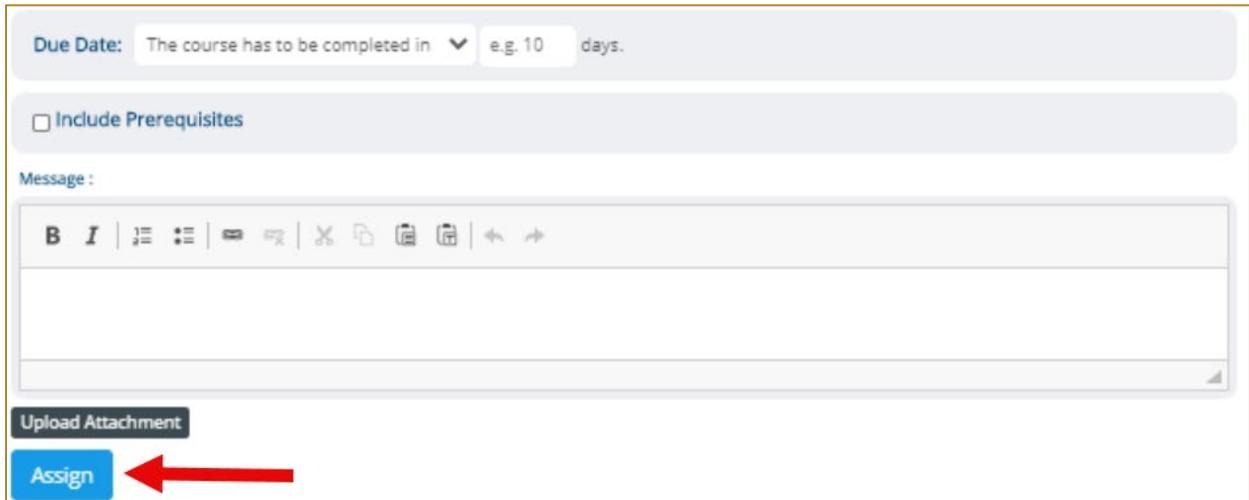
If you select the "Unassign users once the due date is missed", another checkbox will appear, which if selected will auto-unassign the users as soon as they reach their due date, regardless of their completion or certificate's expiration.





- Unassign users once due date is missed
- Force unassignment regardless of completion or certificate's expiration

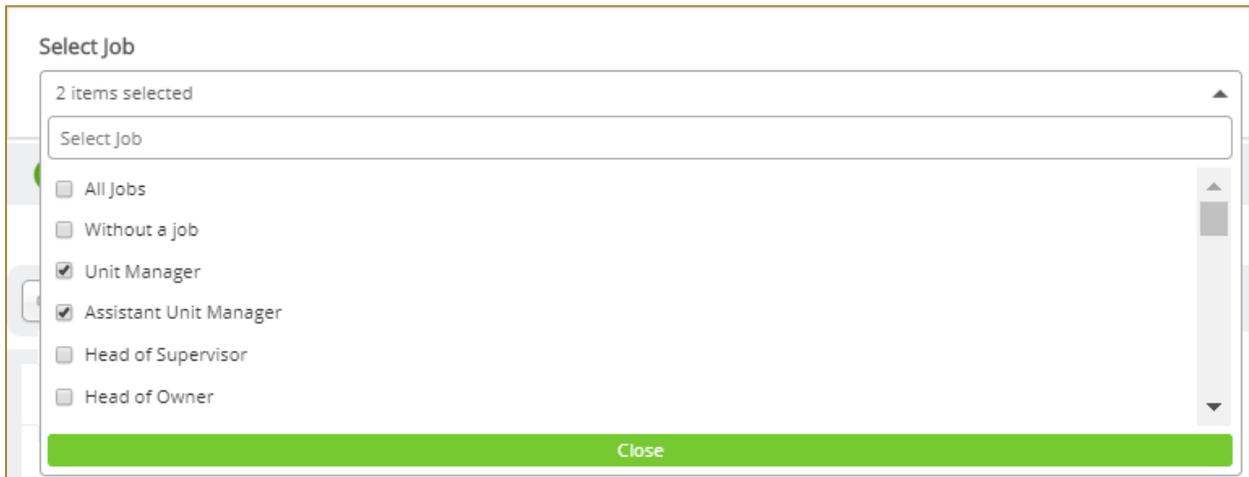
If you wish, you can add an attachment by selecting if you want the prerequisites (if any) to be assigned as well and click on the **Assign** button.



Each of these individuals will then receive a notification in the LMS as well as an email that they have been assigned a course.

### Assign a Course to a Group of Team Members

You can also assign a course to one or more groups of people based on their job and location. Moreover, you can create an assignment rule to assign future hires automatically. Last but not least, you also have the option to schedule the assignment to be made as a one-off, on a specific future date.



Then, select both the desired Above Units and Units in their respective columns, filtering using the drop-down menus, if needed. By clicking on the view selected option, only the items that you have already selected will be filtered.





You can also filter the users based on custom fields by clicking the "Choose Additional Fields" dropdown. There you will also find the Hired Date fields as options for filtering.

The number of individuals affected will appear below.

Select Job
view selected (1)

1 items selected

Select Above Units
view selected (8)

Filter by Type

Search for Above Unit

- All
- Commercial Department 3
- Customer Office Department 1
- Customer Success Department 0
- Greece Country 34
- Learning & Brand Success Department 1
- Schoox Company 1
- Technology Department 0
- US Country 1

Select Units
view selected (4)

Filter by Above Unit

Search for Units

- All
- Accounting
- Business Development
- Customer Solutions 4
- Customer Success 6
- DevOps
- Direct Sales 4
- Executive Team 7
- Integrations
- Learning & Development
- Marketing
- Mobile Development

+ Add more Job/Unit Criteria

Choose additional fields

• Employees that match criteria	57
• Employees already assigned	5
• Employees to assign <span style="color: #C00000; font-size: small;">(Click here to download now the list of the assignees)</span>	52

You have the option of using an extra filter for Team Members who have a specific language set as a preferred content language.

Preferred Content Language:

All
▼

