Admin Job Aid: Assignment Profiles

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Purpose

The purpose of this job aid is to guide you through the step-by-step process of creating an Assignment Profile. Assignment Profiles are groupings of users created for the purpose of automatic assignment. Each profile contains one or more groups, with each group containing one or more rules. All rules within a group must be matched for a user to match its parent group and, therefore, be placed in the Assignment Profile. However, a user must only meet the criteria for one group to be placed in the profile. In other words, rules within a group have an “and” relationship while groups within an Assignment Profile have an “or” relationship.

In this job aid, you will learn how to:

- Task A. Create an Assignment Profile
- Task B. Create and Manage Rules
- Task C. Associate Learning and Execute Changes
Task A. Create an Assignment Profile

1. Select **Manage User Learning** to expand the menu of options.
2. Select **Assignment Profiles**.
3. Select **Add New**.
4. Enter an **Assignment Profile ID**.
5. Enter the **Security Domain**.
6. Enter the **Contact Email Address** of the person responsible for the Assignment Profile record.
   **NOTE:** The Description, Created For, and Notes fields are not required.
7. Select the **Add** button.
Task B. Create and Manage Rules

1. Once the Assignment Profile record has been created, select Rules to create and manage rules.
2. Enter the Security Domain(s).
3. Select Create Group.
4. Enter a name for the Group.
5. Select an **Attribute** from the drop-down list.
6. Select an **Operator** from the drop-down list.
7. Select the **Search Icon** in the Value field if you are not sure what to put there.

8. Check the box for the Value you want to select.
9. Select the **Add** button.
10. Select **Save**.

11. Select **Download Preview Users** to see a list of users who match the criteria.

12. If you want to add a rule within a group, select **Add Rule**.

13. If you want to add another group, select **Create Group**.
Task C. Associate Learning and Execute Changes

1. Select Items.
2. Select Add Items icon.
3. Check the box next to the item you want to associate to the Assignment Profile.
4. Select the Add button.

NOTE: Other than Items, you can also associate Libraries, Curricula, Programs, Recommendations, and User Groups to an Assignment Profile.
5. Once you have finished associating everything that needs to be included in the Assignment Profile record, you must execute changes. At this point, the status of the items added is **Pending Addition**. Once you execute the changes, the status will change to **Valid**.

6. Select **Actions**.

7. Select **Execute Changes**.
8. You can choose to execute the changes immediately or schedule it for a future time by selecting the radio button next to the option you prefer.

9. Enter your **Email Address**.

10. Select **Finish**.