

Assign Users

July 2022

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Introduction

Purpose: This job aid introduces the Assign Users workflow. Batch Registration Managers can assign existing learners to courses by searching for individual learner accounts, adding by TRAIN user ID, or uploading a streamlined data file. The workflows are designed to be distinct and compartmentalized in order to increase focus, reduce confusion, and limit the potential for errors.

Highlights include:

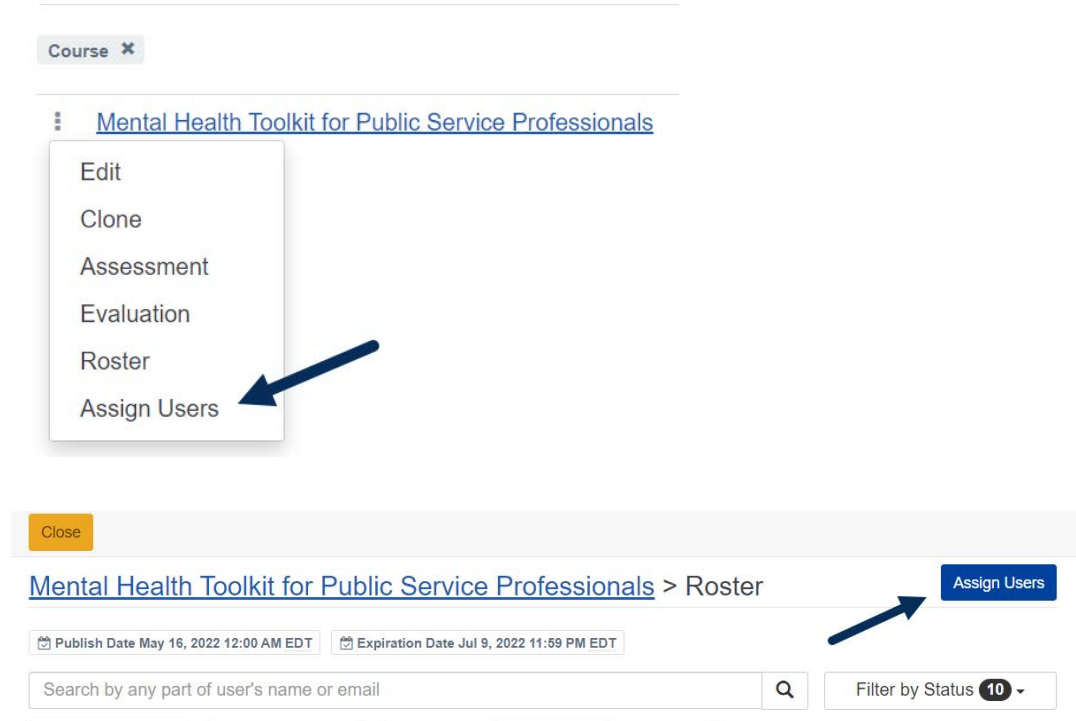
- Automatically setting registrations of assigned learners to Not Started status
- Improving account selection and review with Select All and Show Selected Only options in the Search and Select workflow
- Improving the method of choosing parameters for each assignment batch (live event session, credit type, session role)
- Improving the upload file logic to match registrations to learners by TRAIN user ID, email address, or combination of email and first/last name
- Improving the email notification skip functionality to be more clear

Access:

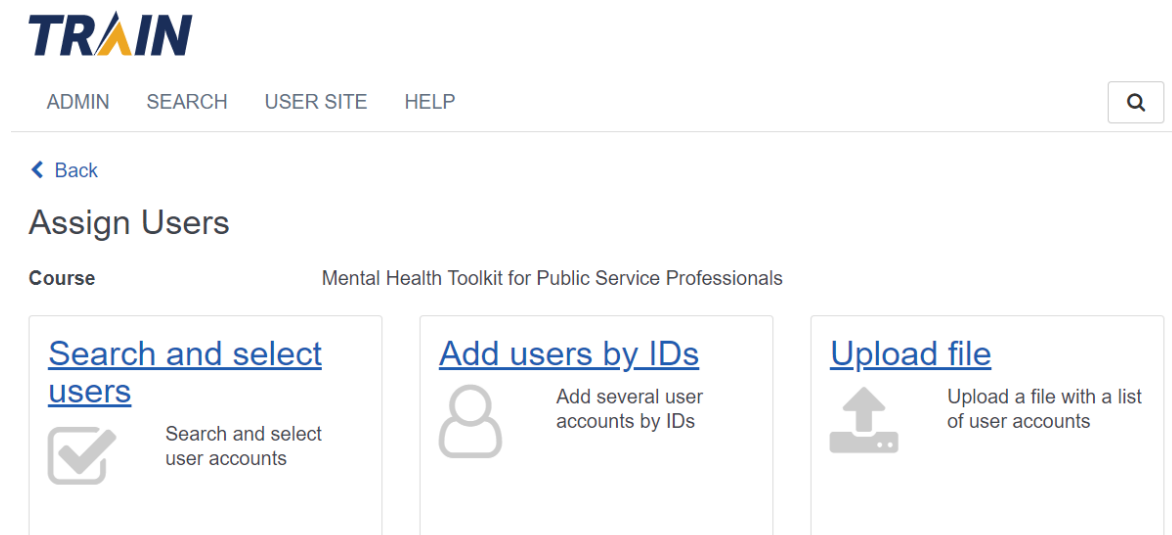
- **Batch Registration Managers** will be able to access this workflow

Accessing the Assign Users Workflow

Batch Registration Managers will see Assign Users options in the Course menu and in the Course Roster.



When you enter the workflow, you will see three options for identifying the learners who should be assigned to the course.



Search and Select Accounts to Assign

When you use the Search and Select option, you can find learners individually or by group. You can search by learner name, login name, email address, or TRAIN user ID. The group filter is the same as in other areas of TRAIN.

You can select multiple individual records across all results pages. A toggle to show selected records only can assist you in reviewing your selections, as shown below.

A setting for sending email notification is prominently displayed and set to Yes by default. For guidance on how to use this setting, please see the [Editing Email Notification](#) section.

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[Assign Users](#) - Search and select users

Course Mental Health Toolkit for Public Service Professionals

Send email notification

Yes [Preview email notification](#)

[Change](#)

Search by Last Name, First Name, Login Name, Email, or User ID



Filter By Group **1**

Select all



Show selected only

6 users are selected. [Clear selection](#)

	Name	Username	Email
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]

[Assign 6 Users](#)

If you use the Select All checkbox, it will select only the visible records. A prompt will display, providing the total count across all results pages for you to review. You can bulk select the entire results set by clicking on the prompt. This is helpful if all members of one or more groups needs to be selected for the course.

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[Assign Users](#) - Search and select users

Course Mental Health Toolkit for Public Service Professionals

Send email notification Yes [Preview email notification](#)

[Change](#)

Search by Last Name, First Name, Login Name, Email, or User ID Filter By Group **3**

Select all ← Show selected only

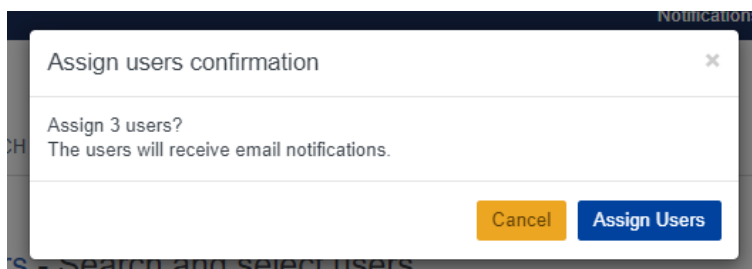
10 users are selected. [Clear selection](#) [Select all 102 user accounts that match this search](#)

	Name	Username	Email
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]

« < 1 2 3 4 5 6 7 8 9 10 > »

[Assign 10 Users](#)

Clicking the Assign button will prompt a confirmation message. You can cancel and go back to your selections or click the Assign Users button to process the request.



After you click the Assign Users button, a Results page will be provided. On this page, you can choose to export results sets (all records, successfully assigned records only, or failed records only).

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[Assign Users](#) - Result

Course Mental Health Toolkit for Public Service Professionals

Send email notification Yes [Preview email notification](#)

Email notifications have been sent to new users

Successfully assigned: 3

Export

Assign more users

Add Accounts to Assign by TRAIN User ID

When you use the Add by ID option, you can enter TRAIN user IDs to identify learners to assign. You can type in the numbers or copy/paste from a data file, such as a TRAIN report output.

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[Assign Users](#) - Add users by IDs

Course Mental Health Toolkit for Public Service Professionals

Send email notification Yes [Preview email notification](#)

[Change](#)

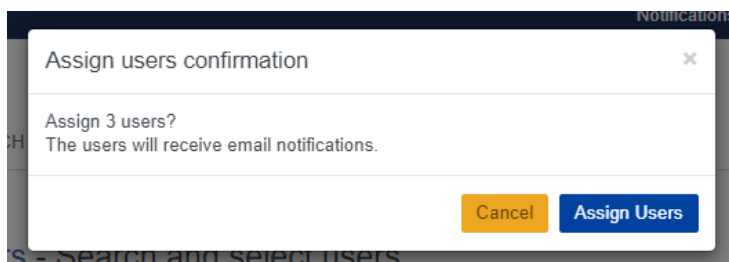
Separate User IDs by carriage returns, spaces, or commas. Enter up to 1000 IDs at a time.

1033445
3279685
3398123

User(s) with ID [1033445, 3279685, 3398123] were added.

Assign Users by IDs

Clicking the Assign button will prompt a confirmation message. You can cancel and go back to your selections or click the Assign Users button to process the request.



After you click the Assign Users button, a Results page will be provided. On this page, you can choose to export results sets (all records, successfully assigned records only, or failed records only).

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[Assign Users](#) - Result

Course Mental Health Toolkit for Public Service Professionals

Send email notification Yes [Preview email notification](#)

Email notifications have been sent to new users

Successfully assigned: 3

Export

Assign more users

Add Accounts to Assign by Uploading a Data File

When you use the Upload File option, you start by downloading an example template to provide TRAIN User ID, email address, last name, and first name. These data points will be used to identify the correct learner record for assignment to the course.

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[Assign Users](#) - Upload file

Course Mental Health Toolkit for Public Service Professionals

Send email notification Yes [Preview email notification](#) [Change](#)

Users will be selected by:

- UserID
- OR if UserID is empty by Email
- OR if Email is not unique by Email, FirstName, and LastName

All other fields will be ignored.

[Download example](#)

Upload file to assign users to the course

[Drop file here or click to upload](#)

Assign Uploaded Users

When you upload the completed template, you will see the file name and size prior to submitting the request.

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[Assign Users](#) - Upload file

Course Mental Health Toolkit for Public Service Professionals

Send email notification Yes [Preview email notification](#)

[Change](#)

Users will be selected by:

- UserID
- OR if UserID is empty by Email
- OR if Email is not unique by Email, FirstName, and LastName

All other fields will be ignored.

[Download example](#)

Upload file to assign users to the course

100%

assign_users_template616.xlsx

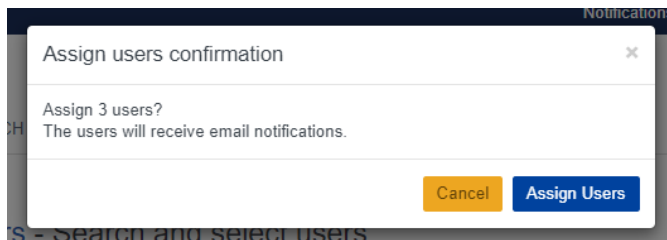
size: 11.5 KB

type: application/vnd.openxmlformats-officedocument.spreadsheetml.sheet

[Remove](#)

[Assign Uploaded Users](#)

Clicking the Assign button will prompt a confirmation message. You can cancel and go back to your selections or click the Assign Users button to process the request.



After you click the Assign Users button, a Results page will be provided. On this page, you can choose to export results sets (all records, successfully assigned records only, or failed records only).

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[Assign Users](#) - Result

Course Mental Health Toolkit for Public Service Professionals

Send email notification Yes [Preview email notification](#)

Email notifications have been sent to new users

Successfully assigned: 3

[Export](#)

[Assign more users](#)

Editing Email Notification

The email notification is set to Yes by default and uses a shared email template. If you keep email notifications enabled, successfully assigned learners will receive an email about the course if they are opted-in for TRAIN emails. If you do not want to send an email, click the Change link and choose the option to skip the notification.

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[Assign Users](#) - Search and select users

Course Mental Health Toolkit for Public Service Professionals

Send email notification Yes [Preview email notification](#)

[Change](#)

Search by Last Name, First Name, Login Name, Email, or User ID



Filter By Group **3**

You can also use the Change link to access an optional Additional Text box. If you choose this option and enter text, it will display in a specific area of the email template.

Email notifications

Send email notification to assigned users

Send email notifications

Add additional text to email notification

ADDITIONAL TEXT ADDED FOR ILLUSTRATION PURPOSES

Skip notification

Cancel Save

Preview email

You have been registered on TRAIN: Please read additional instructions!

Dear [FirstName] [LastName]:

You have been registered for a course on the TRAIN Learning Network by [Shauna Fitzgerald](#).

'[Mental Health Toolkit for Public Service Professionals](#)' has been added to Your Learning on [www.TRAIN.org](#).

[Sample of ProviderDirections] [Sample of ProviderWillContact]

ADDITIONAL TEXT ADDED FOR ILLUSTRATION PURPOSES

Withdrawing from a course

If you wish to withdraw yourself from this course, click the **Your Learning** tab at the top of the homepage and then click on **Your Current Courses**. Next, find the course listing and click on the three dot action menu to the left of the course name and select "Withdraw." This removes the course from **Your Learning**, however, you may also need to withdraw through the course provider as well. Please note that 3rd party courses may not have the option to withdraw within the TRAIN system.

Course Launch

If this is an online/web-based course, go to **Your Learning**, click the three dot action menu to the left of the course and then click the "Launch" or "Go to Step 2 of Registration" options to launch the course or finish your registration.

Course Completion

If this is a live event course, go to **Your Learning**, click the three dot action menu to the left of the course and then click the Mark Completed option. If there is an evaluation/assessment for this course you will then be asked to complete the evaluation/assessment. If your organization requires a course to be Verified upon completion please follow your organization's guidelines for accomplishing this.

Questions?

If you're having issues with the course, visit the course details page and click on the "Contacts" tab for contact information.

TRAIN Team
[AffiliateName]
(222)

Close

Selecting Credit Type (if applicable)

If the course offers credits, you can choose to make this selection on the learners' behalf during assignment. **The choice will apply to all learners selected in this batch for assignment.**

You can make the selection at the beginning of the process by clicking the Change link to the right of the Credit type area. A box will appear in which you can use the dropdown menu to select the credit type for this particular batch of learners. You can skip selection by choosing None as the option.

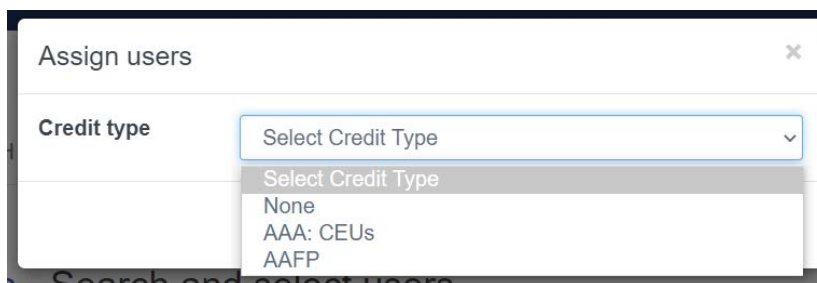
Once the selection is saved, it will display on each page of the workflow and can be changed if needed before assigning the batch of learners.

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[Assign Users](#) - Search and select users

Course	Mental Health Toolkit for Public Service Professionals
Credit type	Not selected
Send email notification	Yes Preview email notification

 [Change](#)
[Change](#)



Assign users

Credit type

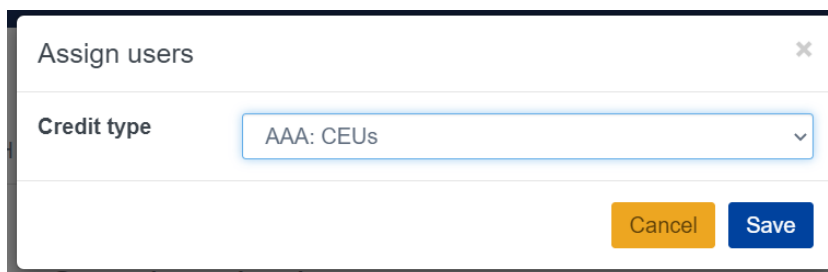
Select Credit Type

Select Credit Type

None

AAA: CEUs

AAFP



Assign users


Credit type

AAA: CEUs

Cancel Save

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[Assign Users](#) - Search and select users

Course	Mental Health Toolkit for Public Service Professionals
Credit type	AAA: CEUs 
Send email notification	Yes Preview email notification

[Change](#)

[Change](#)

Selecting Live Event Session (if applicable)

If you use the Assign Users workflow for a Live Event with sessions, you must choose the session first. **The choice will apply to all learners selected in this batch for assignment.** Select the appropriate session by clicking on the date and time box.

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Assign Users - Select session

Course Public Health Leadership Round Table

Sessions

Aug 4, 2022 10:00 AM EDT - 2:00 pm EDT Public Health Foundation
Jul 21, 2022 3:00 PM EDT - 5:00 pm EDT Public Health Foundation (9 seats available)

Once selected, the session information will display on each page of the workflow you choose to follow. The session can only be changed prior to choosing your assignment workflow. Below are two examples of this display.


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Assign Users


Course Public Health Leadership Round Table

Session Jul 21, 2022 3:00 PM EDT Public Health Foundation [Change](#)


[Search and select users](#)

 Search and select user accounts

[Add users by IDs](#)

 Add several user accounts by IDs

[Upload file](#)

 Upload a file with a list of user accounts

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[Assign Users](#) - Search and select users

Course Public Health Leadership Round Table

Session Jul 21, 2022 3:00 PM EDT Public Health Foundation [Change](#)

Credit type Not selected [Change](#)

Send email notification Yes [Preview email notification](#) [Change](#)

Search by Last Name, First Name, Login Name, Email, or User ID Filter By Group **1**

Select all

Show selected only

Selecting Session Role (if applicable)

If you use the Assign Users workflow for an Exercise course type with sessions, you must choose the session as well as a role. **The choices will apply to all learners selected in this batch for assignment.** Select the appropriate session by clicking on the date and time box.

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Assign Users - Select session

Course Disaster Response and Triage Exercise

Sessions

Jul 19, 2022 9:00 AM EDT - 4:00 pm EDT
[Public Health Foundation](#)

Once selected, the session information will display on each page of the workflow you choose to follow, as shown in the previous section. After you make your workflow choice, you will see Session role as an option you must complete. Click the Change link to open the roles available to select.

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[Assign Users](#) - Add users by IDs

Course Disaster Response and Triage Exercise

Session Jul 19, 2022 9:00 AM EDT Public Health Foundation

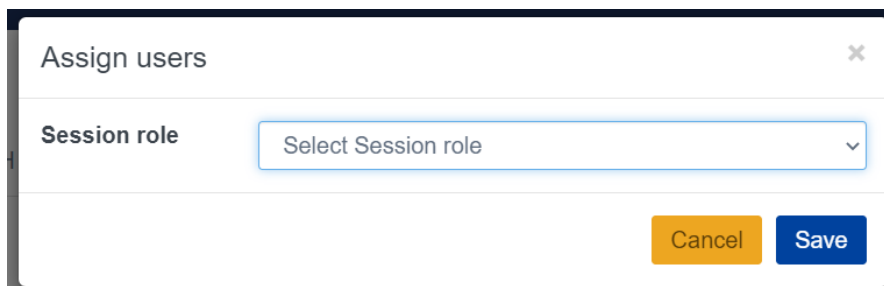
Session role Not selected [Change](#)

Send email notification Yes [Preview email notification](#) [Change](#)

Separate User IDs by carriage returns, spaces, or commas. Enter up to 1000 IDs at a time.

Assign Users by IDs

Use the dropdown menu to view role options and select a role for this batch of learners.



Assign users

Session role Select Session role

Cancel Save

Assign users ✕

Session role

- Select Session role
- Controller
- Evaluator
- Facilitator
- Observer
- Planner
- Player
- Simulator


Assign users ✕

Session role

Once saved, the role will be displayed on every page of the workflow and can be changed if needed before assigning the batch of learners.

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[Assign Users](#) - Add users by IDs

Course	Disaster Response and Triage Exercise	
Session	Jul 19, 2022 9:00 AM EDT Public Health Foundation	
Session role	Facilitator 	Change
Send email notification	Yes Preview email notification	Change

Separate User IDs by carriage returns, spaces, or commas. Enter up to 1000 IDs at a time.