Job Aid:

Updating User Assignments After Adding or Removing Objects from a Skill Profile

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Overview

Summary

When changing the content within a Skill Profile it may be important to update the list of content items within the skill profile to be assigned to the user, or update their Completion Status. The process for making these updates is the same for all Skill Profile types, including Curriculum and Equivalency. Use the instructions below to help ensure your users are updated in the way you intend.

Overview of Skill Profile Types

A skill profile is a collection of assignable objects; the collection may include Courses, Nuggets, Assessment Sets, Events, and Activities. A Curriculum is a type of skill profile that can also include a skill profile within the bundle of assignable objects. An Equivalency is a type of skill profile that contains assignable objects that are considered equivalent from a completion credit perspective. If two items are inside, completion of either will provide a completion for the skill profile.

Updates to Skill Profiles

Assignable objects can be added to or removed from an established skill profile at any time, though it is important to consider how these updates will affect users who have already been assigned to the skill profile. You have several choices:

1. The updates you make only affect users who may be assigned to the skill profile in the future.

2. The updates you make should affect users currently assigned to the skill profile;

   a. If the user already has a completed status, take them back to "Incomplete" and assign the new item.

   b. If the user is in progress, simply add the new item to their list of necessary items to complete.

Section 1: Update User Assignments after Adding Content to a Skill Profile

Content was added to a Skill Profile

When adding content to a Skill Profile it may be important to ensure that all users that were initially assigned this Skill Profile are updated with the newly added content.

Scenario 1: Only apply changes to users assigned in the future

If only newly assigned users need to be given the new content you would not need to perform any Reset status or Update status actions. Previously assigned users would retain their completion status and their assignments would remain the same.

"Assign after" functionality

Use the "Assign after" functionality to ensure that any updates to a skill profile that should <u>only</u> affect users newly assigned the skill profile from this date forward in time- will mark and reflect a specific date that you intend for that to be the case.

For example, it is June 15th. As a curriculum designer, you need to update your onboarding program as of July 1st. The skill profile will have several new items in it. You don't want to have these changes affect the users who were on-boarded from January 1st to June 30th. So you would:

1. Add the new items into your skill profile

2. Mark that these updates should "Assign after" June 30th

3. Do <u>not</u> click the "Update Status" or "Reset Status" buttons

Only users assigned to this skill profile after June 30th will see the additional items you added.

Scenario 2: Update currently assigned users

Once you have made your additions to the Skill Profile content and you <u>do</u> want to ensure that all users currently assigned to the Skill Profile get the newly added content, from the Skills/Games dropdown, select Skill Profiles – select the Skill Profile, Curriculum, or Equivalency desired to open the Skill Profile details page.
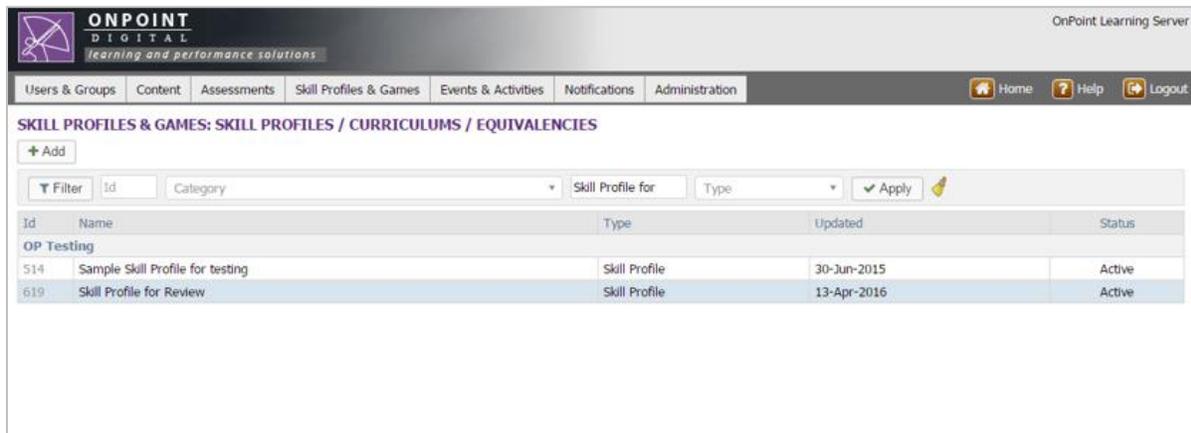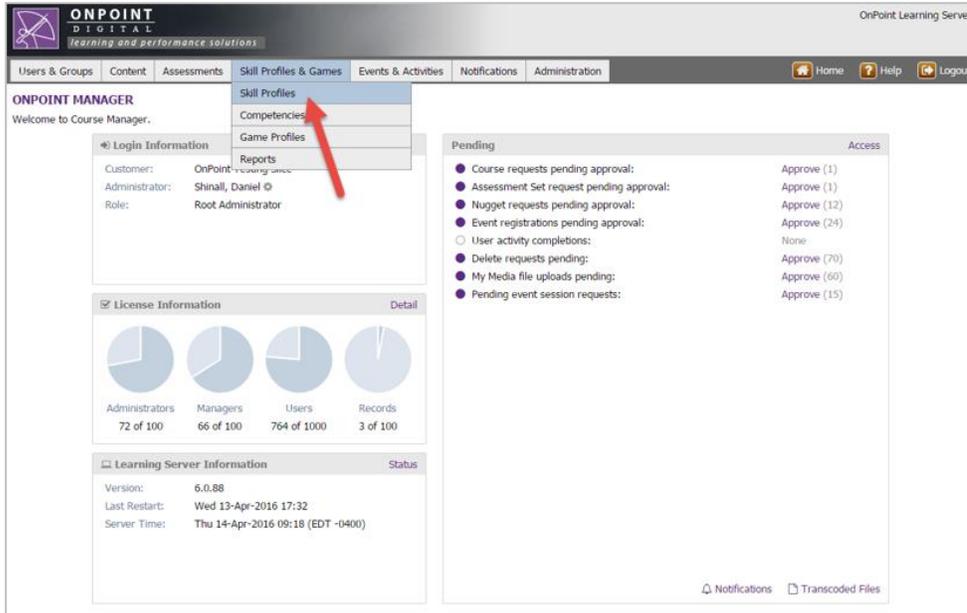
Scenario 2- Step 1: Set Completed Users Back to Incomplete

From the Skill Profile details page select the "Reset Status" button in the bottom right corner of the page. <u>This will change all "Completed" users for the Skill Profile back to Incomplete</u> (as they have yet to complete the newly assigned content).
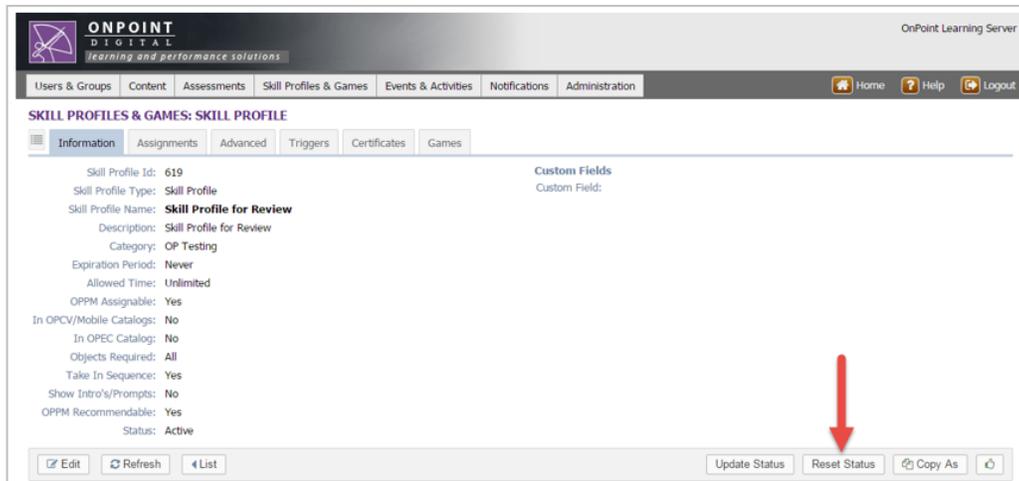
Scenario 2- Step 2: Update the Skill Profile for all Incomplete users to include the new content

Once Completed users have been reset to Incomplete run an "Update Status" action. This function will run a process that will ensure that anyone that is not in a Completed status for the Skill Profile (these users we just set back to Incomplete and any other users In Progress) will get assigned the new content that you added to the Skill Profile.

> The "Reset Status" button is used when you need to set users with a completed status back to incomplete because you added to the required items in the Skill Profile since the time they completed it.

The "Update Status" button makes a system check as to what is completed against what the Skill Profile's latest saved components include, and assigns any new items to the user.

Section 2: Update User Assignments after Removing Content from a Skill Profile

Content was removed from a Skill Profile

When removing content from a Skill Profile it may be important to ensure that all users that were initially assigned this content with the Skill Profile but have yet to complete it get their statuses updated to reflect it not being a requirement for completion any longer.

Scenario 1: Only apply changes to users assigned in the future

If only newly assigned users need to be given the new (reduced) set of content, you would not need to perform any "Reset Status" or "Update Status" actions. Use the "Assign After" functionality described in Section 1 to mark the date the newly updated Skill Profile should take effect.

Scenario 2: Update currently assigned users

To update all currently assigned users of the Skill Profile against the current requirements select the Skills/Games dropdown, select Skill Profiles and select the Skill Profile, Curriculum, or Equivalency desired from the table list to open the Skill Profile details page.

From the Skill Profile details page select the "Update Status" button in the lower right corner of the page. This will run a check on all assigned users of the Skill Profile against the current assignments required for the Skill Profile. Each User will have their Skill Profile Status updated based upon this check.
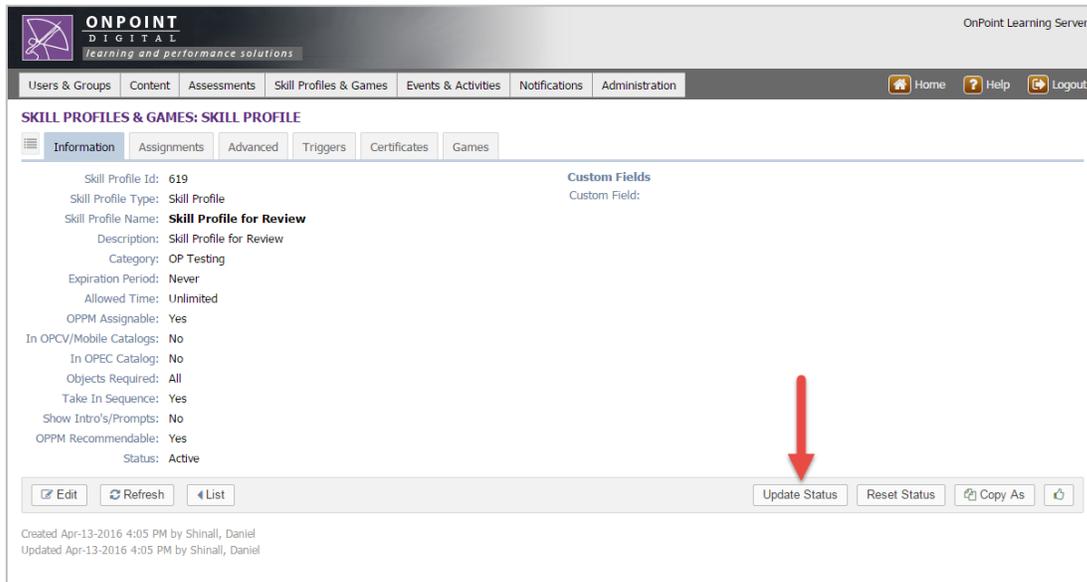
The "Update Status" button is like a "Refresh" where the system checks user completion status against the latest saved assignment components of the Skill Profile.

Note: We don't ever actually "remove" the assigned item from the user; we just remove it from the skill profile. That way, they retain the assignment and can complete is as desired, but it will no longer be a part of achieving completion of the skill profile.