

# 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.

The screenshot shows the 'SKILLS & GAMES: SKILL PROFILE' page. At the top, there are tabs: Information (selected), Assignments, Advanced, Triggers, Certificates, and Games. Below the tabs, a message says 'Skill Profile: Activity Upload Skill Profile (Id:35)'. A note states: 'Changes to the assigned objects should always be followed with an 'Update Status' from the information page. For u...'. The main content is divided into sections: 'Assigned Objects' (listing Pfeffer: Bridging The Knowing-Doing Gap as a Nugget and Activity Upload 1 as an Activity), 'Assigned Users' (listing 12 users), and 'Assigned Groups/Job Codes' (listing K's WinRT Group and New job code).

## 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 only 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 15<sup>th</sup>. As a curriculum designer, you need to update your onboarding program as of July 1<sup>st</sup>. 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 1<sup>st</sup> to June 30<sup>th</sup>. So you would:

1. Add the new items into your skill profile
2. Mark that these updates should “Assign after” June 30<sup>th</sup>
3. Do not click the “Update Status” or “Reset Status” buttons

Only users assigned to this skill profile after June 30<sup>th</sup> 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 do 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.

## Skill Profile Updates

The screenshot shows the OnPoint Learning Server dashboard. At the top, there's a navigation bar with links for Users & Groups, Content, Assessments, Skill Profiles & Games (which has a red arrow pointing to it), Events & Activities, Notifications, and Administration. Below the navigation bar is a sidebar titled "ONPOINT MANAGER" with sections for Login Information (Customer: OnPoint Learning Server, Administrator: Shinall, Daniel O, Role: Root Administrator) and License Information (showing pie charts for Administrators, Managers, Users, and Records). The main content area is titled "Pending" and lists various requests with their status and approve counts. At the bottom right of the main content area, there are links for Notifications and Transcoded Files.

The screenshot shows the "SKILL PROFILES & GAMES: SKILL PROFILES / CURRICULUMS / EQUIVALENCIES" page. At the top, there's a navigation bar with links for Users & Groups, Content, Assessments, Skill Profiles & Games (highlighted in blue), Events & Activities, Notifications, and Administration. Below the navigation bar is a search/filter bar with fields for Id, Name, Category, Skill Profile for, Type, and Apply. The main content area displays a table of skill profiles:

ID	Name	Type	Updated	Status
514	Sample Skill Profile for testing	Skill Profile	30-Jun-2015	Active
619	Skill Profile for Review	Skill Profile	13-Apr-2016	Active

### 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. This will change all “Completed” users for the Skill Profile back to Incomplete (as they have yet to complete the newly assigned content).

The screenshot shows the OnPoint Learning Server interface. At the top, there's a navigation bar with links for Users & Groups, Content, Assessments, Skill Profiles & Games, Events & Activities, Notifications, and Administration. To the right of the navigation bar are links for Home, Help, and Logout. Below the navigation bar, the title "SKILL PROFILES & GAMES: SKILL PROFILE" is displayed, followed by a sub-menu with tabs for Information, Assignments, Advanced, Triggers, Certificates, and Games. The main content area displays a "Skill Profile for Review" with the following details:

Skill Profile Id:	619	Custom Fields
Skill Profile Type:	Skill Profile	Custom Field:
Skill Profile Name:	<b>Skill Profile for Review</b>	
Description:	Skill Profile for Review	
Category:	OP Testing	
Expiration Period:	Never	
Allowed Time:	Unlimited	
OPPM Assignable:	Yes	
In OPCV/Mobile Catalogs:	No	
In OPEC Catalog:	No	
Objects Required:	All	
Take In Sequence:	Yes	
Show Intro's/Prompts:	No	
OPPM Recommendable:	Yes	
Status:	Active	

At the bottom of the page, there are several buttons: Edit, Refresh, List, Update Status, Reset Status, Copy As, and a blank button. A large red arrow points to the "Reset Status" button.

### 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. ]

## Skill Profile Updates

The screenshot shows the OnPoint Learning Server interface for managing skill profiles. The main title is "SKILL PROFILES & GAMES: SKILL PROFILE". Below it, there's a sub-header "Information". The page displays various settings for a skill profile:

- Skill Profile Id: 619
- Skill Profile Type: Skill Profile
- Skill Profile Name: **Skill Profile for Review**
- Description: Skill Profile for Review
- Category: OP Testing
- Expiration Period: Never
- Allowed Time: Unlimited
- OPPM Assignable: Yes
- In OPCV/Mobile Catalogs: No
- In OPEC Catalog: No
- Objects Required: All
- Take In Sequence: Yes
- Show Intro's/Prompts: No
- OPPM Recommendable: Yes
- Status: Active

On the right side, there's a section for "Custom Fields" with a placeholder "Custom Field:". At the bottom right of the main content area, there are several buttons: "Edit", "Refresh", "List", "Update Status" (which has a red arrow pointing down to it), "Reset Status", "Copy As", and a trash can icon.

[  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.

The screenshot shows the OnPoint Learning Server interface. At the top, there is a navigation bar with links for Users & Groups, Content, Assessments, Skill Profiles & Games (which is highlighted in blue), Events & Activities, Notifications, and Administration. Below the navigation bar, there is a sidebar titled "ONPOINT MANAGER" with sections for Login Information (Customer: OnPoint - Testing, Administrator: Shinall, Daniel, Role: Root Administrator) and License Information (Administrators: 72 of 100, Managers: 66 of 100, Users: 764 of 1000, Records: 3 of 100). To the right of the sidebar, there is a main content area titled "Pending" which lists various pending requests with their status and count. At the bottom right of the main content area, there are links for Notifications and Transcoded Files.

The screenshot shows the "SKILL PROFILES & GAMES: SKILL PROFILES / CURRICULUMS / EQUIVALENCIES" management screen. At the top, there is a header with a "+ Add" button. Below the header, there is a search/filter bar with fields for Id, Name, Category, Skill Profile for, Type, Updated, and Status. A "Filter" dropdown is also present. Below the search bar, there is a table listing skill profiles. The table has columns for Id, Name, Type, Updated, and Status. Two rows are visible: one for "Sample Skill Profile for testing" (Skill Profile, 30-Jun-2015, Active) and one for "Skill Profile for Review" (Skill Profile, 13-Apr-2016, Active).

### 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 screenshot shows the OnPoint Learning Server interface. At the top, there's a navigation bar with links for Home, Help, and Logout. Below that is a sub-navigation bar for 'SKILL PROFILES & GAMES: SKILL PROFILE' with tabs for Information, Assignments, Advanced, Triggers, Certificates, and Games. The 'Information' tab is selected. The main content area displays various settings for a Skill Profile, including its ID (619), type (Skill Profile), name (Skill Profile for Review), and various configuration options like Description, Category, Expiration Period, and Status. At the bottom of this section are buttons for Edit, Refresh, and List. To the right of the main content, there's a 'Custom Fields' section with a 'Custom Field:' label. In the bottom right corner of the main content area, there's a row of buttons: 'Update Status' (which has a red arrow pointing to it), 'Reset Status', 'Copy As', and a 'Print' icon. Below the main content, there are two lines of small text indicating creation and update details.

Created Apr-13-2016 4:05 PM by Shinall, Daniel  
Updated Apr-13-2016 4:05 PM by Shinall, Daniel

[ 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 it as desired, but it will no longer be a part of achieving completion of the skill profile.