PeopleFluent Learning

Multiple Assignments

Contents

About this Document

Introduction

This document is intended for experienced PeopleFluent LMS administrators learning to work with multiple assignments. Multiple Assignments refers to the circumstances where an individual has more than one job assignments for the employer at the same time, with each assignment potentially having a different location, manager, organization and so on.

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About Multiple Assignments

Multiple Assignments refers to the circumstances where an individual has more than one job assignments for the employer at the same time, with each assignment potentially having a different location, manager, organization and so on. This is common in companies with branches located in close proximity. For example:

- Education, where teachers working part-time in two or more schools, or where supply teachers work in a number of schools.

- Healthcare, where nurses or doctors work in more than one hospital or healthcare practice.

- Retail, where staff work in chains with multiple outlets, such as restaurants, coffee shops, bars, or car servicing.
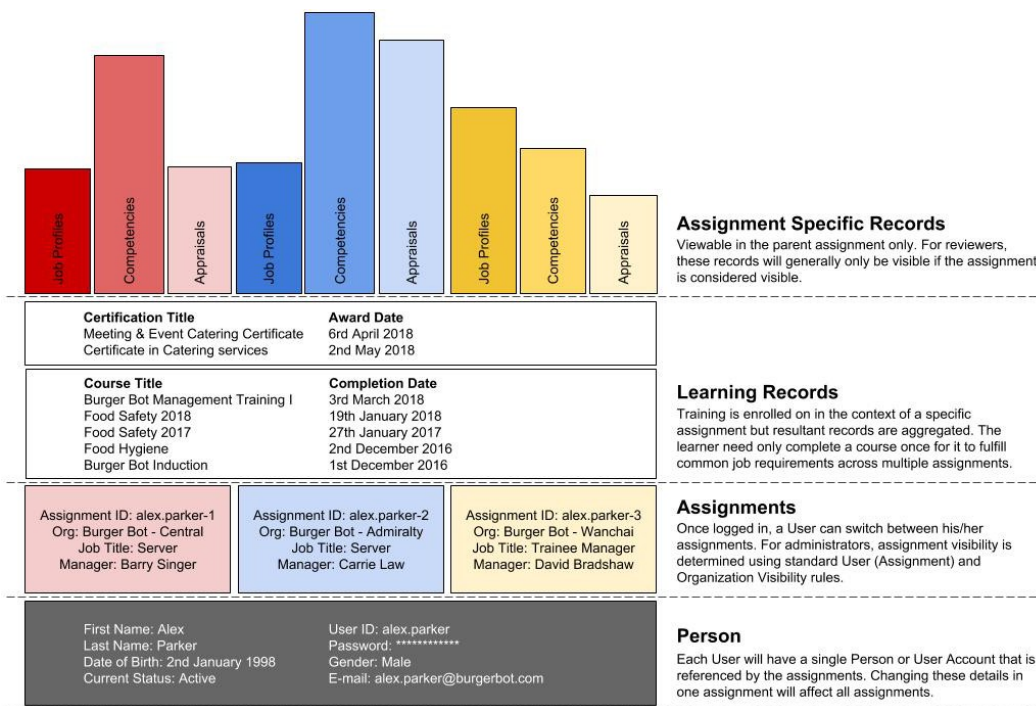
PeopleFluent LMS support for multiple assignments allows these situations to be modeled while ensuring that training undertaken as an individual is considered across assignments for qualifications. Specifically, multiple assignments provides the following benefits:

- An individual only needs one login account to manage multiple assignments, avoiding the complications of logging in and out repeatedly for accessing the assignments.

- An individual only needs one set of personal information that applies to all assignments, avoiding the duplication of profiles.

- Multiple assignments link different assignments of an individual together, and add up the learning records across all assignments at the person-level.

- An individual can have separate training requirements and be evaluated independently based on the assignment-level, and hence leading to specific training certifications.

- An organization can track an individual's compliance needs according to the responsibilities of each particular assignment. It can then create a compliance identity to provide target training on the person-level.

- An organisation can monitor the learning for all assignments of an individual for compliance requirements.

Data Model

A Person with multiple assignments is regarded as a single entity in PeopleFluent LMS. In the depicted example, we can observe the following:

- A Person called Alex Parker

- Alex has three assignments

- Alex has completed 5 training courses, which are visible across all three assignments

- Alex has 2 certificates, which are visible across all three assignments

- Each assignment has its own set of Job Profile, Competency, and Appraisal records

Assignment Specific Records
Viewable in the parent assignment only. For reviewers, these records will generally only be visible if the assignment is considered visible.

Certification Title	Award Date
Meeting & Event Catering Certificate	6rd April 2018
Certificate in Catering services	2nd May 2018

Course Title	Completion Date
Burger Bot Management Training I	3rd March 2018
Food Safety 2018	19th January 2018
Food Safety 2017	27th January 2017
Food Hygiene	2nd December 2016
Burger Bot Induction	1st December 2016

Learning Records
Training is enrolled on in the context of a specific assignment but resultant records are aggregated. The learner need only complete a course once for it to fulfill common job requirements across multiple assignments.

Assignment ID: alex.parker-1	Assignment ID: alex.parker-2	Assignment ID: alex.parker-3
Org: Burger Bot - Central	Org: Burger Bot - Admiralty	Org: Burger Bot - Wanchai
Job Title: Server	Job Title: Server	Job Title: Trainee Manager
Manager: Barry Singer	Manager: Carrie Law	Manager: David Bradshaw

Assignments
Once logged in, a User can switch between his/her assignments. For administrators, assignment visibility is determined using standard User (Assignment) and Organization Visibility rules.

First Name: Alex
Last Name: Parker
Date of Birth: 2nd January 1998
Current Status: Active
User ID: alex.parker
Password: *************
Gender: Male
E-mail: alex.parker@burgerbot.com

Person
Each User will have a single Person or User Account that is referenced by the assignments. Changing these details in one assignment will affect all assignments.

The Person and Assignment Levels

Generally, when Multiple Assignments is enabled, you will find Assignments being listed in the LMS rather than Users. For example, if we continue with the above scenario, here are Alex Parker's assignments being listed at Manage Users with Assignment Specific properties highlighted:
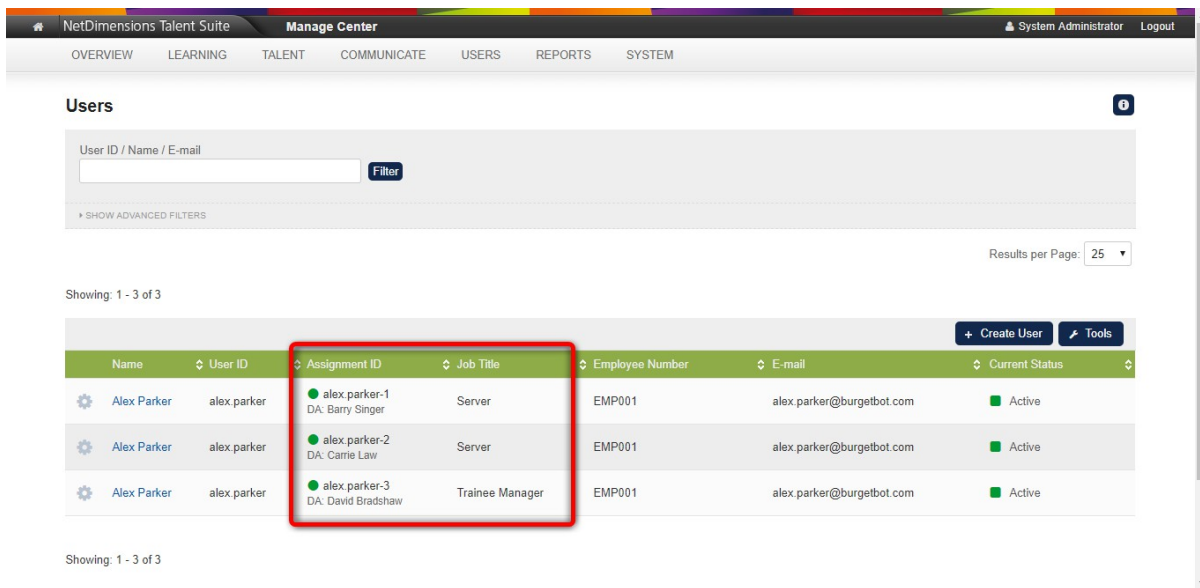
Inspecting the values under each column, you can see that

- Name, User ID, Employee Number, E-mail, and Current Status are Person level properties and are thus identical across the assignments

- Assignment ID and Job Title are at the Assignment Level and can therefore be different Clicking on an assignment will launch the User Editor:

The highlighted sections are at the Person Level - changing these properties in one assignment will affect all assignments. The other properties are at the Assignment Level.

Learning Records

While training is enrolled on in the context of a specific assignment, Learning Records are aggregated across all assignments for a Person. Learning Records include Transcripts, External Training Records, and Certifications. In the Alex Parker example then, all five learning records would be visible regardless of whether the user was logged in as alex.parker-1, alex.parker-2, or alex.parker-3:

Furthermore, if we were to add a fourth assignment "alex.parker-4" for Alex Parker, all the Learning Records related to his three older assignments would be immediately available to this new one also:

Similarly, if a certification is awarded to alex.parker-3, it will also be displayed in alex.parker-1, alex.par ker-2, and alex.parker-4:

In addition to visibility across assignments, the aggregation means that:

- Course actions for active enrollments e.g. launching content, taking exams, evaluations, and marking courses complete, are available across assignments

- Validation for prerequisites, withdrawals, and completion will take into consideration learning records across assignments

- While competencies are awarded at the assignment level, training-based competencies will be awarded based on learning records across assignments and will thus result in the same competency being awarded to each assignment

- Aggregated results across assignments will be returned in search

Note that enrollments themselves are still assignment specific so factors like which enrollment policy should be applied and thus which e-mail notifications will be sent will be tied to the assignment with which the Person enrolled with.

Assignment Specific Records

Assignment Specific Records are not aggregated and so they are viewable in the parent assignment only. These include Job Profiles, Competencies, and Appraisals. For reviewers, these records will generally only be visible if the assignment is considered visible.

To illustrate, let's take the Alex Parker example. Suppose a competency "Cost Control in Food Service " has been awarded to alex.parker-4. This Competency would be listed under alex.parker-4:

However, the Competency would not be applicable to alex.parker-1, alex.parker-2, or alex.parker-3:

Functional Features

Enabling Multiple Assignments

Before enabling the Multiple Assignment function in PeopleFluent LMS, a request should be submitted to the PeopleFluent Account Management or Support Team for a functional needs assessment. Once the need for multiple assignments has been validated, the function can be enabled by checking **System Configuration > General (Category) > Enable Multiple Assignments**.

> ⚠️ Warning
>
> - The System should only have on logical domain (i.e. Global Default Domain).
>
> - A new domain cannot be created when this function is enabled.
>
> - To disable the function, all users with multiple assignments should be removed from the System first.

User Login

When a User with multiple assignments logs in, they will be logged into the assignment from their last log in. The User can select another assignment by clicking Select Assignments (shown only when there are multiple active assignments):
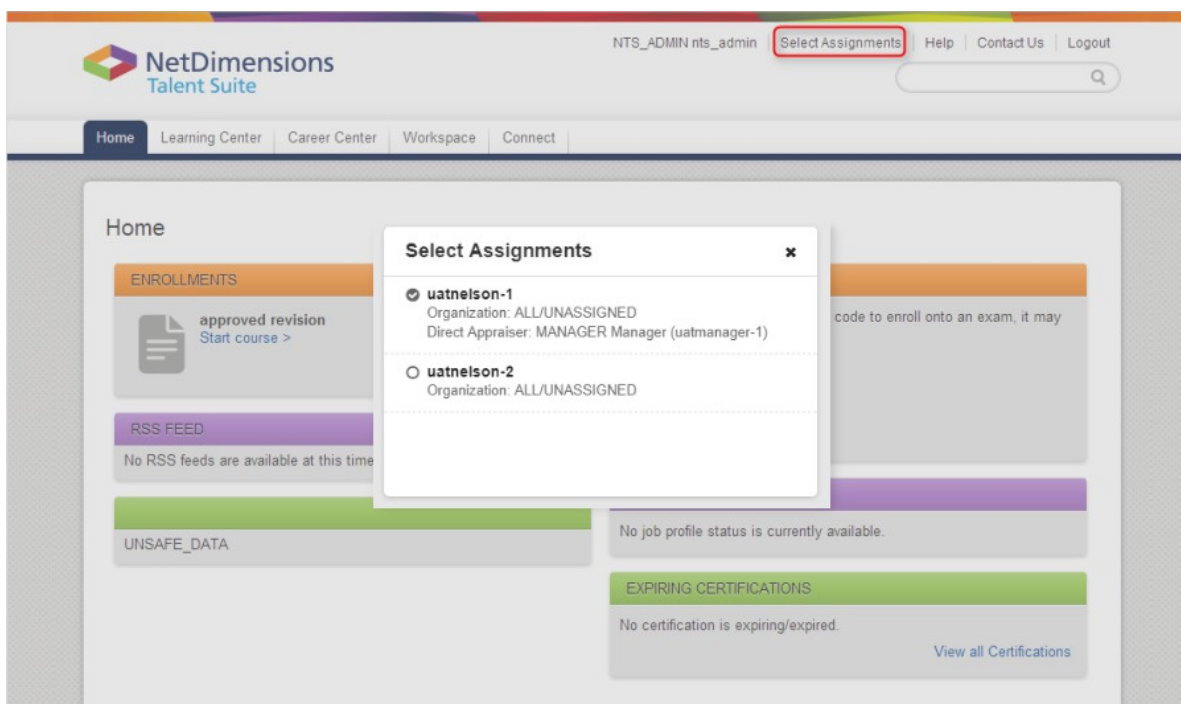
ⓘ As NTS support configurable menus, a new attribute is added to the navigations.xsd such that configurable menu can add the "Select Assignments" link. To add the link to the menu, add the following in navigations.xml:

`<item labelKey="menu.select.assignment" isAssignmentSelector="true" />`

After adding the item, the "Select Assignments" link will be shown in the configured place.

Person and Assignment Management

In PeopleFluent LMS, both persons and assignments are created / deleted / edited under **Manage Center > USER MANAGER > Users > User Editor**.

A person, regardless of the number of assignments he / she has, only has a single personal profile, a single login, and a single password defined at the person-level for authentication in the LMS. Once a new profile is created, the first assignment of this person will be created, and the initial password will be randomly generated.

Managing Assignments

To create / delete / edit assignment(s) for a person, click Manage Assignments. All assignments in the person profile will be listed:

- To edit the desired assignment, click it directly.

- To delete the desired assignment, click "X" on its top right. If it is the last assignment, the profile of that person will be deleted too.
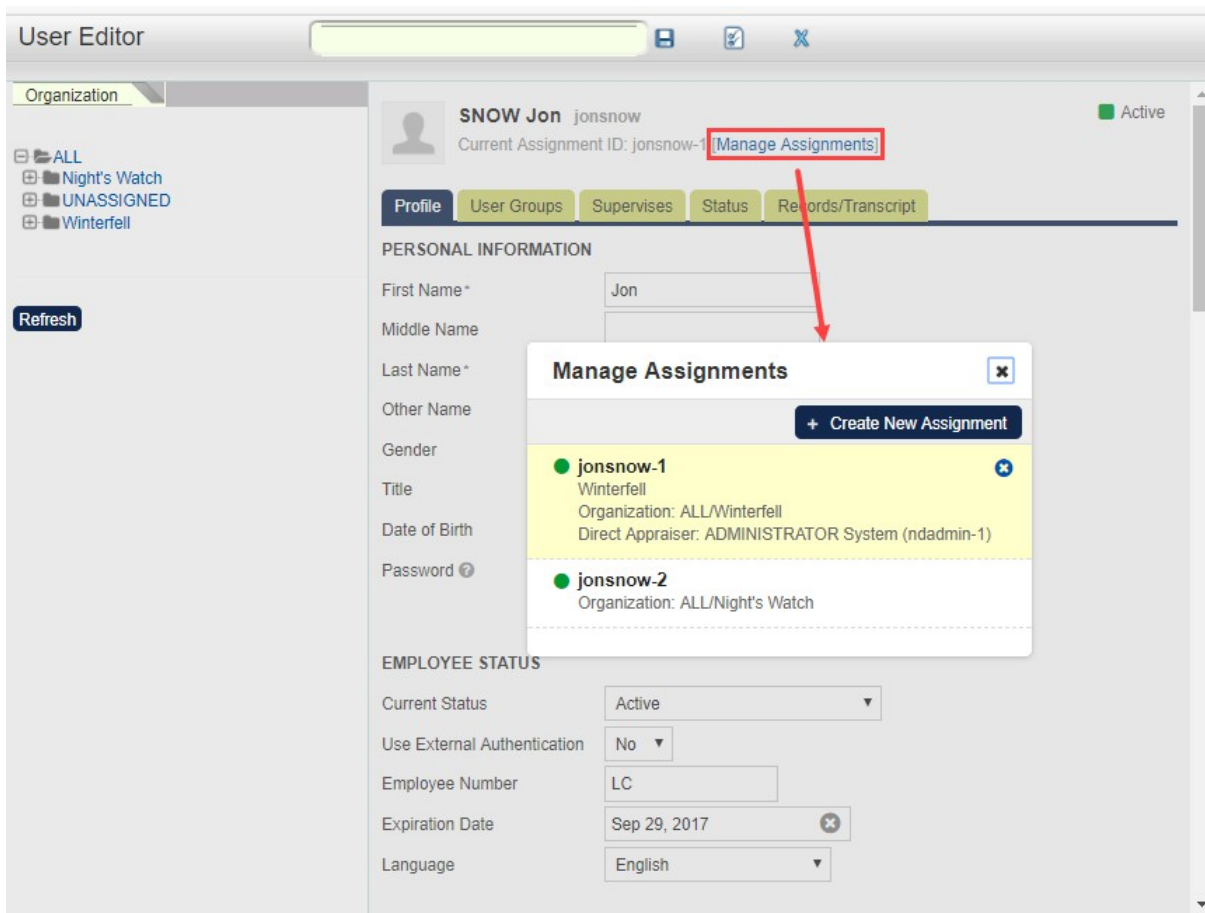
- To delete all assignments of a person in one go, go to the Users Page and delete one of the assignments.

Automated Assignment ID Generation

The Assignment ID is unique. The ID of the first assignment will be system-generated using the User ID as the prefix and a suffix of a number sequence incremented with each new assignment, separated by a dash (i.e. {userid}-{sequence number}).

Whenever the User ID is updated, the Automatic Migration Rules of eligible Assignment ID(s) would update the assignment ID(s) of that user:

- Assignment ID(s) will only be updated if it follows the system-generated pattern.

- Suffix sequence numbers are preserved as much as possible. Suppose a User ID "chris" (with Assignment IDs "chris-1", "chris-123", "chris-234") changes to "christy", then the Assignment IDs will be updated to "christy-1", "christy-123", "christy-234".

- When conflict occurs, the entry concerned will be handled with a new system-generated ID.

Automatic Migration is also supported in the CSV Loaders. If the data row involves updating both the Assignment IDs and User ID at the same time, the automatic update of Assignment IDs is always done after the User ID update. So the Migration Rules above would be applied if the existing assignment ID is eligible for migration.

Expired Assignments

The LMS will automatically clean up the accounts of the persons whose all assignments have expired. Everyday, the System looks for such accounts and changes the Status to "Account Closed" if the end dates of all assignments have expired. In the User Editor, the Current Status field will then be read-only:

Once in this status, the Administrator can either add a new assignment, or update the Assignment End Date of an existing assignment to a future date to enable the Current Status field again.

User ID Migration

Sometimes an individual may have multiple assignments registered under more than one User IDs, this can lead to confusion in management. The **User ID Migration** Function under **Manage Center > USERS > USER MANAGER** can group these assignments and put them under a single User ID.
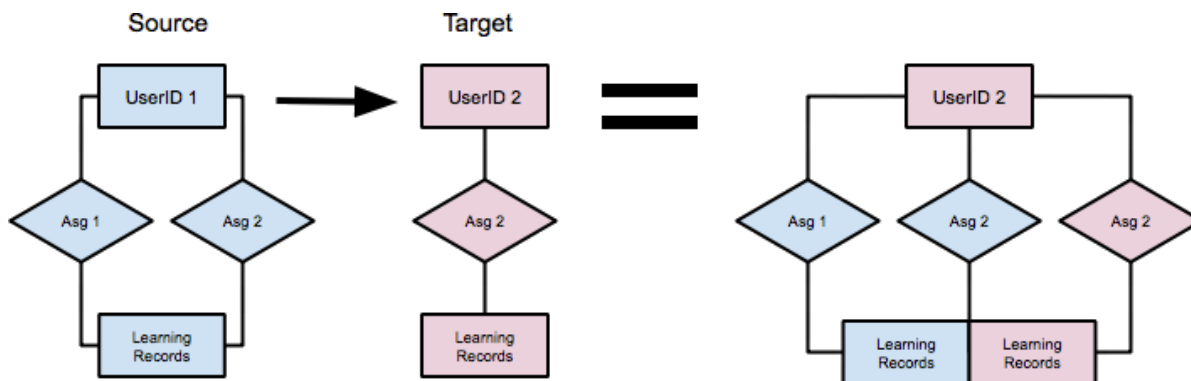
Determine the User ID to discard and the one to keep for the individual, and regard them as the Source User ID and Target User ID respectively. Enter them in the corresponding boxes, and check the required settings.

For details regarding this function's settings, please refer to the section User ID Migration in the Administrator / User Guides "User Administration".
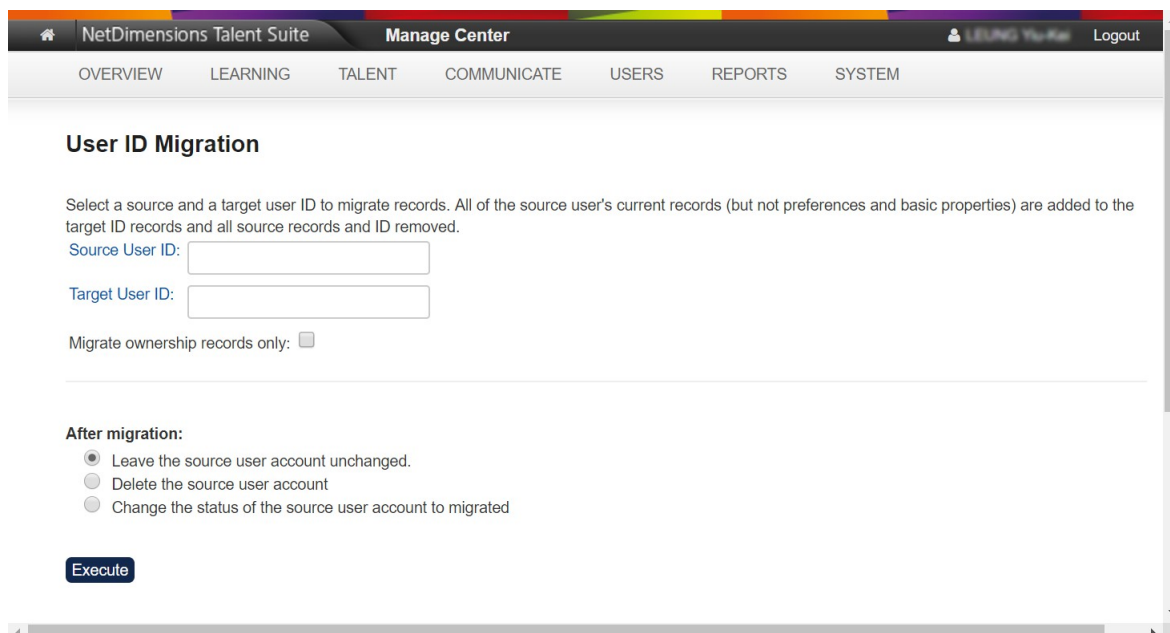
Support to Multiple Assignments

Data loaders, API's, and standard reports have been adapted to support Multiple Assignments.

Data Loaders

Data loaders and their support for Multiple Assignments are listed below:

Data Loader	Notes
User Data Loader	The columns "AssignmentID" and "Direct Appraiser AssignmentID" support Multiple Assignments. The loader process will fail if it can identify more than one assignment for a user, and no AssignmentID is specified.
Training Records CSV Loader	The column "AssignmentID" in the Training Records CSV Loader supports Multiple Assignments. The loader process will fail if it can identify more than one assignment for a user, and no AssignmentID is specified.
Certification Awarding CSV Loader	The optional "Assignment ID" column will be available if Multiple Assignments is enabled. If the value is specified, the associated record would be treated in the context of the specified assignment.
User Group Data Loader	
Program CSV Data Loaders	The Assignment IDs of Session Instructors and Session Approvers can be specified if Multiple Assignments is enabled. T he columns support the definition of the Userid separated by a "^" and followed by the Assignment ID. If the value is specified, the associated record would be treated in the context of the specified assignment.
Course CSV Data Loaders	
User CSV Loader	For a user with multiple assignments, the assignment account to update with the personal record defined in the CSV file should be specified. The NewAssignmentID column is used for updating to a new ID for existing assignments, and taking precedence for new assignments; while the AssignmentID column is used for the lookup rather than the update. A specific user's assignment can be set as an Organization Approver in the User CSV Loader.

API

The following API Functions specifically support Multiple Assignments:

- enrollments

- certificationsAwarded

- assignments

- JobProfileAssigner

- contentHandler/imsEnterprise

- User Group API

    - userGroupAdder

    - userGroupRemover

    - supervisedGroupsAdder

    - supervisedGroupsRemover

Please refer to the the Whitepaper EN049 PeopleFluent LMS API for details regarding these Functions.

The "assignmentId" parameter is used for multiple assignments in APIs. It allows the API to be executed within the context of a particular assignment for an authenticated user. This parameter is present in most APIs except:

- Those not requiring user authentication

- Those having no difference no matter which assignment executes the call

Standard Reports

The Report Setting "Return details of learning against any of a user's assignments" will be available in certain reports if Multiple Assignments is enabled. When checked, these reports will return the details of ALL learning against the user (including the assignments not selected by the relevant learning). These Reports include:

- R202 - Enrollment Summary for Specified Modules/Sessions

- R209 - Participants Report on A Particular Module

- R213 - Individual Participant Report on Learning Programs

- R214 - Individual Participant Report on Learning Modules

- R223 - Active Participants of a Learning Module by Organization

- R251 - Completed Courses by User(s)

- R305 - User Exam Score and Status

- R421 - Report of Merged User IDs

- R502 - Program Completion Status

- R509 - Module Completion Audit Compliance report

- R503 - Mass Distribution Program Compliance Status (ORG membership based)

- R504 - Mass Distribution Program Compliance Status (DA-based)

- R501 - Module Completion Target Status

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