School of Risk Management

Large Firm Assignment Guide

VICTOR

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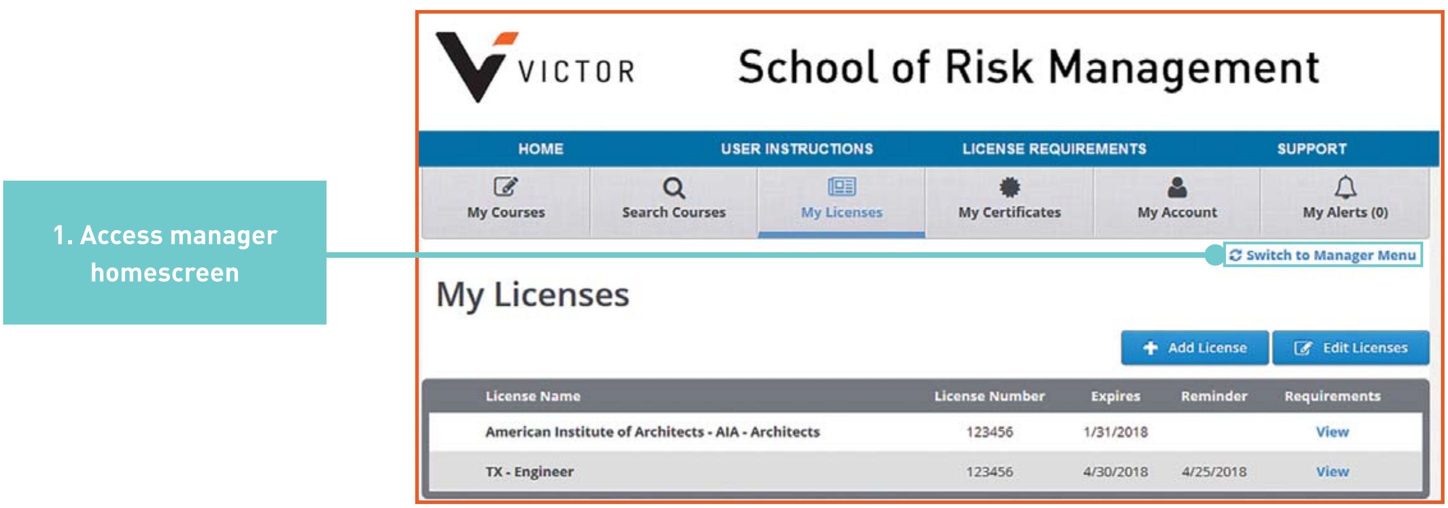
Assigning Courses and Curricula

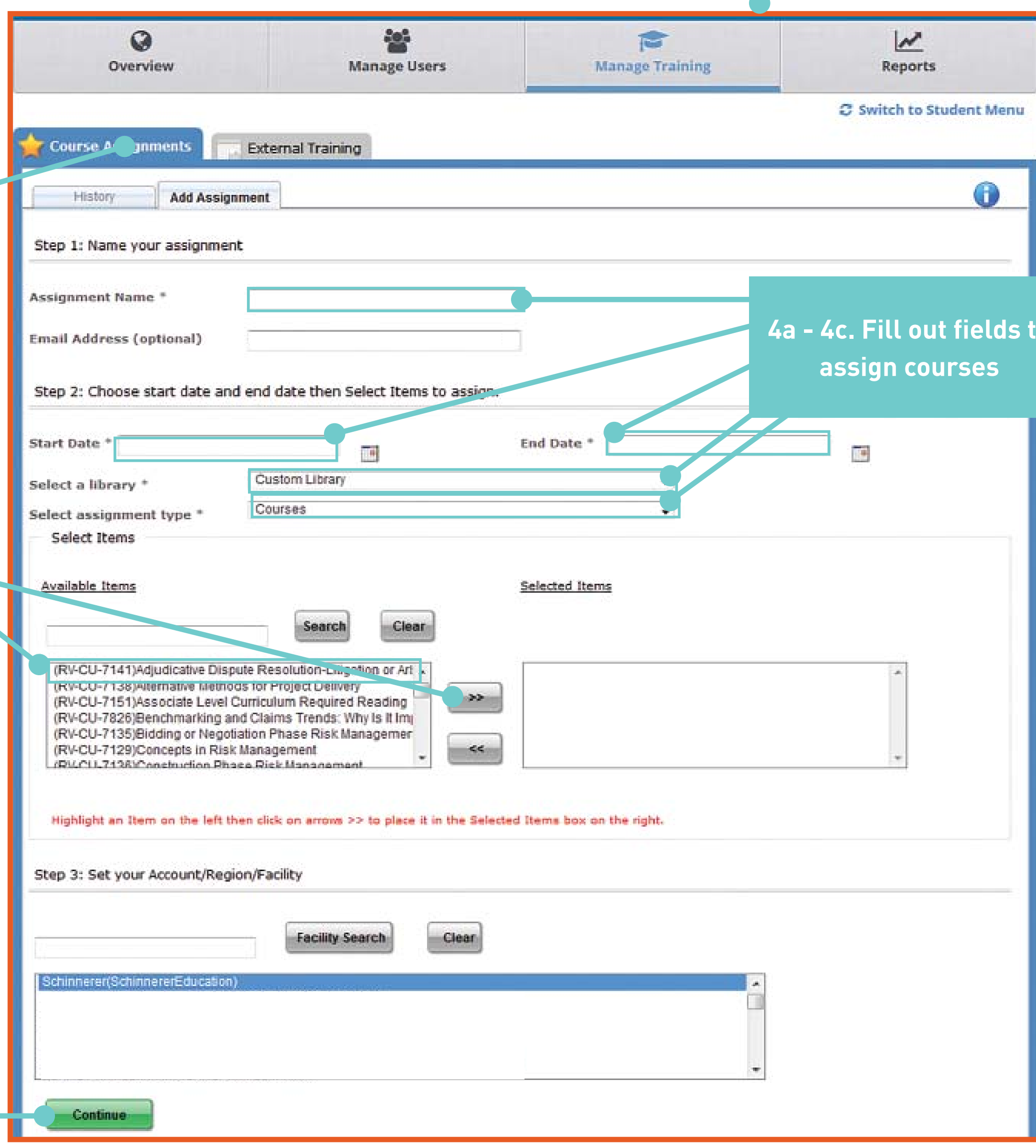
As a firm manager, you are able to assign courses or packages directly to your employees. You can assign one of the School of Risk Management Curricula to one or all employees at one time and track their progress.

Once logged into your School of Risk Management account, follow these steps:

1. Click *Switch to Manager Menu*

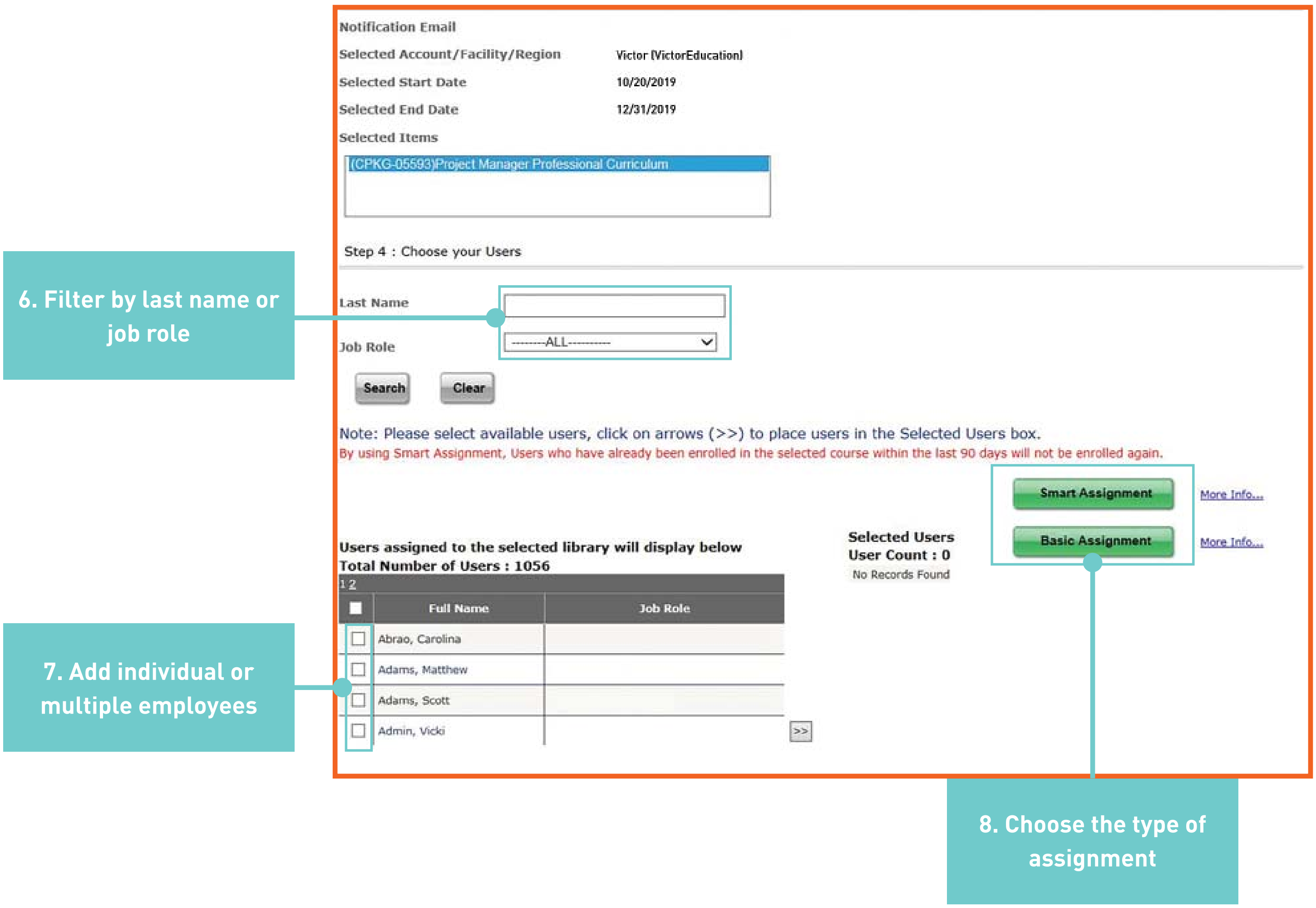


2. Click the *Manage Training* tab
3. Click the *Course Assignment* tab
4. Click the *Add Assignment* tab. Once there:
    a. Add the assignment name
    b. Add the start and end dates
    c. Select *Custom Library and Courses* from the drop down menus
    d. Scroll for the course or curriculum in the search box, highlight your selection, and move the course to the selected items box. You can only choose one curricula at a time.
5. Click *Continue*



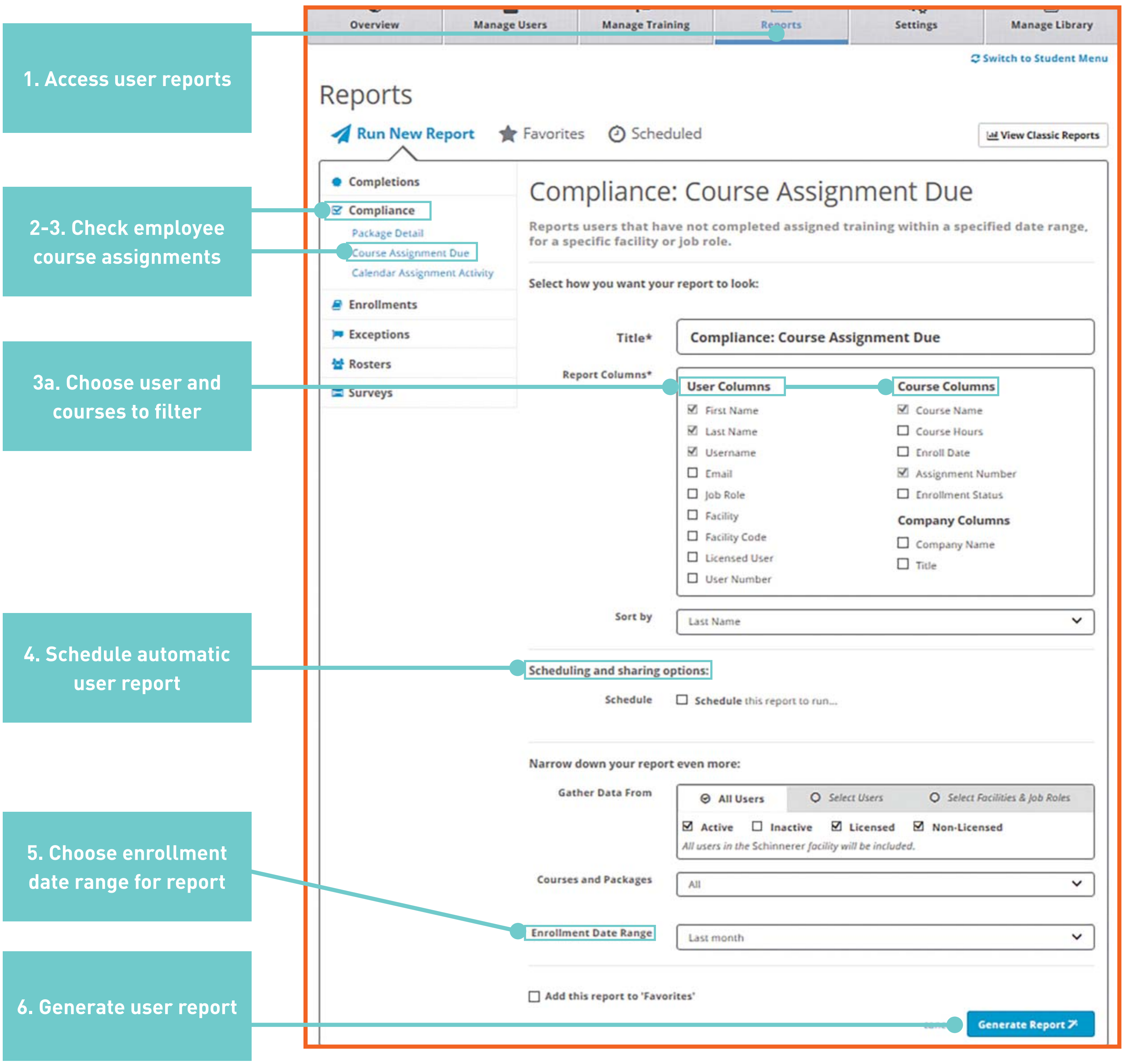
6. Assign the course to your employees. All users in your company will be listed. To filter, add the last name to the search box or choose the job role from the drop down menu.
7. To select a user, click the box to the left of the name, then click the double arrows to move user to the *Selected User* section on the right.
8. Choose the type of assignment:
    a. **Smart Assignment**: looks back at each selected user's history. If the user has completed the assigned course within the past 90 days, the course will not be re-assigned to them.
    b. **Basic Assignment**: will assign the course to each user regardless of their previous course completions.

Once an assignment has been created, the user will receive a notification within 20 mins (or overnight depending on the size of the assignment). Each user can log into their accounts and immediately see their assigned courses.



Assignment Tracking

1. To track assigned courses, click the *Reports* tab located on the grey toolbar.
2. Click *Compliance* on the left tool bar.
3. Click *Course Assignments* Due.
    a. Choose the *User Columns and Course Columns* that you want to see on the report.
4. You can schedule the report to be automatically sent to you. Click the check box under *Scheduling and sharing options* and follow the steps.
5. Choose your *Enrollment Date Range*.
6. Click *Generate Report.*



Customer Support

Technical Questions

If you experience any issues logging into the Victor website, email portal.us@victorinsurance.com for assistance.

For technical issues, CE credits, or course completions, please contact RedVector Client Support at (866) 546-1212 or at **support.lms@vectorsolutions.com**.

Visit us at victorinsurance.com/schoolofriskmanagement to learn more.