



School of Risk Management

Large Firm Assignment Guide



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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*

1. Access manager
homescreen

The screenshot shows the VICTOR School of Risk Management interface. The top navigation bar includes 'HOME', 'USER INSTRUCTIONS', 'LICENSE REQUIREMENTS', and 'SUPPORT'. Below this, there are buttons for 'My Courses', 'Search Courses', 'My Licenses', 'My Certificates', 'My Account', and 'My Alerts (0)'. A 'Switch to Manager Menu' button is visible in the top right. The main content area is titled 'My Licenses' and features 'Add License' and 'Edit Licenses' buttons. A table lists the following licenses:

License Name	License Number	Expires	Reminder	Requirements
American Institute of Architects - AIA - Architects	123456	1/31/2018		View
TX - Engineer	123456	4/30/2018	4/25/2018	View

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*

2. Manage all employee training

3-4. Assign courses and curricula

4a - 4c. Fill out fields to assign courses

4d. Choose individual courses or entire curriculum

5. Move on to the next screen

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.

The screenshot shows a web interface for assigning a course. At the top, it displays notification details: Notification Email, Selected Account/Facility/Region (Victor (VictorEducation)), Selected Start Date (10/20/2019), and Selected End Date (12/31/2019). Below this is a 'Selected Items' section with a dropdown menu showing '(CPKG-05593)Project Manager Professional Curriculum'. The main section is titled 'Step 4 : Choose your Users'. It features a 'Last Name' search box and a 'Job Role' dropdown menu currently set to 'ALL'. There are 'Search' and 'Clear' buttons. A note below states: 'Note: Please select available users, click on arrows (>>) to place users in the Selected Users box. By using Smart Assignment, Users who have already been enrolled in the selected course within the last 90 days will not be enrolled again.' Below the note is a table of users with checkboxes for selection. The table has columns for 'Full Name' and 'Job Role'. The 'Selected Users' section shows a 'User Count : 0' and 'No Records Found'. On the right, there are two buttons: 'Smart Assignment' and 'Basic Assignment', each with a 'More Info...' link. Three callout boxes are present: '6. Filter by last name or job role' points to the search and dropdown fields; '7. Add individual or multiple employees' points to the checkboxes in the user table; '8. Choose the type of assignment' points to the 'Smart Assignment' and 'Basic Assignment' buttons.

6. Filter by last name or job role

7. Add individual or multiple employees

8. Choose the type of assignment

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*.

The screenshot shows the 'Reports' section of a software interface. The 'Reports' tab is selected in the top navigation bar. The main content area is titled 'Compliance: Course Assignment Due' and includes a description: 'Reports users that have not completed assigned training within a specified date range, for a specific facility or job role.' Below this, there are sections for 'Select how you want your report to look:', 'Scheduling and sharing options:', and 'Narrow down your report even more:'. The 'User Columns' and 'Course Columns' sections are expanded, showing various fields with checkboxes. The 'Enrollment Date Range' is set to 'Last month'. A 'Generate Report' button is at the bottom right.

1. Access user reports

2-3. Check employee course assignments

3a. Choose user and courses to filter

4. Schedule automatic user report

5. Choose enrollment date range for report

6. Generate user 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.

This document is for illustrative purposes only and is not a contract. It is intended to provide a general overview of the program described. Please remember only the insurance policy can give actual terms, coverage, amounts, conditions and exclusions. Program availability and coverage are subject to individual underwriting criteria.

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