Course planner (rules and automatic assignments)

For creating bulk assignments, you can always <u>manually</u> add persons and courses to a course planner and then create the assignment. However, there is also an easier, rules-based way to create the assignments without a lengthy search process.

Description of the automatic assignment process

- Within the saved course plan, on the **Rules** screen you can define the criteria to be used for adding persons to the course planner and for automatically assigning them to the pre-selected courses within the planner
- The first step involves the definition of rules. The criteria you can chose from are the <u>property</u> groups **organisation unit** or **jobdescription**, **language**, as well as criteria from the **optional property groups**, which refer to persons and were previoulsy created by SLH. For these criteria you can specify whether you wish to include their child-elements (activate toggle "*Including child elements*") or whether you use the criterion to create a negative rule ("*does not contain*")
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- If you look at the screenshot with the "Criterion combination" rule, you can see that all persons will be added in the course planner that are part of the organisation unit "Management" **AND** have the job description "Manager" **AND** have selected their profile language to be German or Italian (therefore the "does not contain" French and English criterion)
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- You can save as many rules as wanted, but please take into consideration the fact that the rules have an "**OR**" behavior between each other, which means that hits to each rule will be added to the course
- Add the desired courses to the courseplan via the Courses panel
- The course assignment will happen either automatically during the night or it can be triggered manually by clicking on the button "Execute"
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> Pre-existing assignments will not be affected by the rule execution * Deleting a rule after its execution will not delete the assignments created on its base