



Use this checklist to ensure that curricula and assignments are set up correctly PRIOR to propagating the assignment.

1. Before editing or creating an Assignment Profile:

- Confirm that the criteria for assignment are correct.
 - a) Open "PENN User Data (CSV).1" report.
 - b) Enter user criteria. (For example, user ID, job code, org ID, HS entity, etc.)
 - c) Run the report.
 - d) Send the report to the person or team requesting the assignment and ask them to verify that the list is accurate.
 - e) When a response is received, make updates to criteria as needed.

2. Create the curriculum:

- Ensure that you are using the correct naming convention (**HS.XXXXX.CURR.XXXXXXXXXXX**)
- Check that the due date (number of days or specific date) is set up correctly.
- Check that the retraining requirements are set up correctly.
- Assign the curriculum to a test user. (You can do this from the curriculum screen.)
 - o Click Actions, Click Assign
- Open the test user's profile and Launch Proxy. Verify that the curriculum settings are correct.
 - o Click Actions, Click Launch Proxy
 - o Courses are on the learning plan with correct due date.
 - o Courses are marked Required or Optional, as desired.

3. Create the assignment profile:

- Ensure that you are using the correct naming convention (**HS.XXXXX.AP.XXXXXXXXXXX**)
- Enter the requestor's email in the Contact Email field.
- Enter the instructions for the Service Desk (removal requests) in the Notes field.

Under Assignment Profile Search, Click Rules:

- If you are updating existing rules, click Download Preview Users and write down the current total number of employees.
- Are the GROUPS correct? (Each group is evaluated independently from all other groups.)
- Are the RULES within each group correct? (For example, matches, does not match, starts with, etc.)
- Are the attribute values correct? (For example, user IDs, job codes, org IDs, HS entities, etc.)
- Is the domain set to Trustees including subdomains?
- Click Save (to ensure all changes are saved).
- Click Download Preview Users. Are you seeing the expected results (i.e., is the number of users assigned and are the individual users accurate)?
- Have another KL administrator peer review the assignment profile (using this checklist).
- Propagate the assignment profile. (If your role does not allow propagation, send the Assignment Profile ID to a lead KL administrator for propagation.)

4. For the person who requested the assignment:

- Send them a Curriculum Item Status report. (Run the report using the Curriculum ID or Assignment Profile ID as criteria.)
- Assign them (or designated individual) the Report Runner role.
- Send [compliance reporting job-aid](#), Curriculum ID, and Assignment Profile ID to the requestor/report runner.