

CONTINUING EDUCATION

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# VICTOR 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 Victor Risk Advisory curricula to one or all employees at one time and track their progress.

Once logged into your Victor Risk Advisory account, follow these steps:

1. Click Switch to Manager Menu

1. Access manager  
homescreen

License Name	License Number	Expires	Reminder	Requirements
American Institute of Architects - AIA - Architects	123456	1/31/2018		<a href="#">View</a>
TX - Engineer	123456	4/30/2018	4/25/2018	<a href="#">View</a>

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.

Notification Email

Selected Account/Facility/Region: Victor [VictorEducation]

Selected Start Date: 10/20/2019

Selected End Date: 12/31/2019

Selected Items

[(CPKG-05593)Project Manager Professional Curriculum]

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Step 4 : Choose your Users

Last Name:

Job Role:

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.

**Smart Assignment** [More Info...](#)

**Basic Assignment** [More Info...](#)

**Selected Users**

User Count : 0

No Records Found

Users assigned to the selected library will display below

Total Number of Users : 1056

1 2	Full Name	Job Role
<input type="checkbox"/>	Abrao, Carolina	
<input type="checkbox"/>	Adams, Matthew	
<input type="checkbox"/>	Adams, Scott	
<input type="checkbox"/>	Admin, Vicki	

>>

**7. Add individual or multiple employees**

**6. Filter by last name or job role**

**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' interface with the following elements:

- Navigation:** Overview, Manage Users, Manage Training, Reports (selected), Settings, Manage Library.
- Left Sidebar:** Completions, Compliance (selected), Package Detail, Course Assignment Due, Calendar Assignment Activity, Enrollments, Exceptions, Rosters, Surveys.
- Main Content:**
  - Title:** Compliance: Course Assignment Due
  - Report Columns:**
    - User Columns:** First Name, Last Name, Username, Email, Job Role, Facility, Facility Code, Licensed User, User Number.
    - Course Columns:** Course Name, Course Hours, Enroll Date, Assignment Number, Enrollment Status.
    - Company Columns:** Company Name, Title.
  - Sort by:** Last Name
  - Scheduling and sharing options:** Schedule  Schedule this report to run...
  - Narrow down your report even more:**
    - Gather Data From:** All Users (selected), Select Users, Select Facilities & Job Roles.
    - Filters:** Active, Inactive, Licensed, Non-Licensed. (All users in the Schinnerer facility will be included.)
    - Courses and Packages:** All
    - Enrollment Date Range:** Last month
  - Buttons:** cancel, Generate Report

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



## Customer support

### Technical questions

If you experience any issues logging into the Victor website, email [portal.us@victorinsurance.com](mailto: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](mailto:support.lms@vectorsolutions.com).

## About Victor

Victor Insurance Managers LLC is the world's largest managing general underwriter with locations in the US, Canada, UK, Netherlands, Germany, Italy, and Australia. It handles more than \$2.5 billion USD in premium on behalf of numerous insurance carriers, through a large network of more than 25,000 active insurance agents and brokers. With deep, specialized underwriting expertise, the company provides a wide range of insurance coverage – from specialty property and casualty and professional liability insurance to group and retiree benefits. Victor is committed to building on 60-plus years of experience to develop products that address risk in new and evolving areas. For more information, visit [victorinsurance.com](https://victorinsurance.com).

Visit us at [victorinsurance.com/risk-advisory](https://victorinsurance.com/risk-advisory) 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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