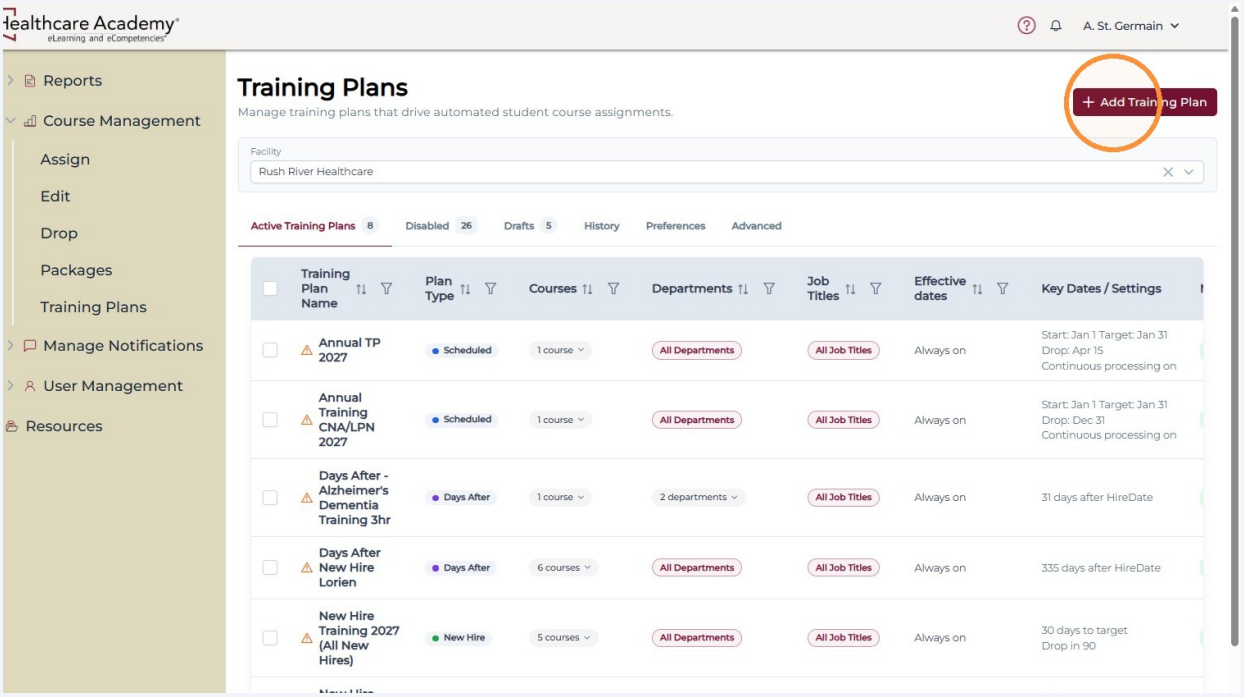
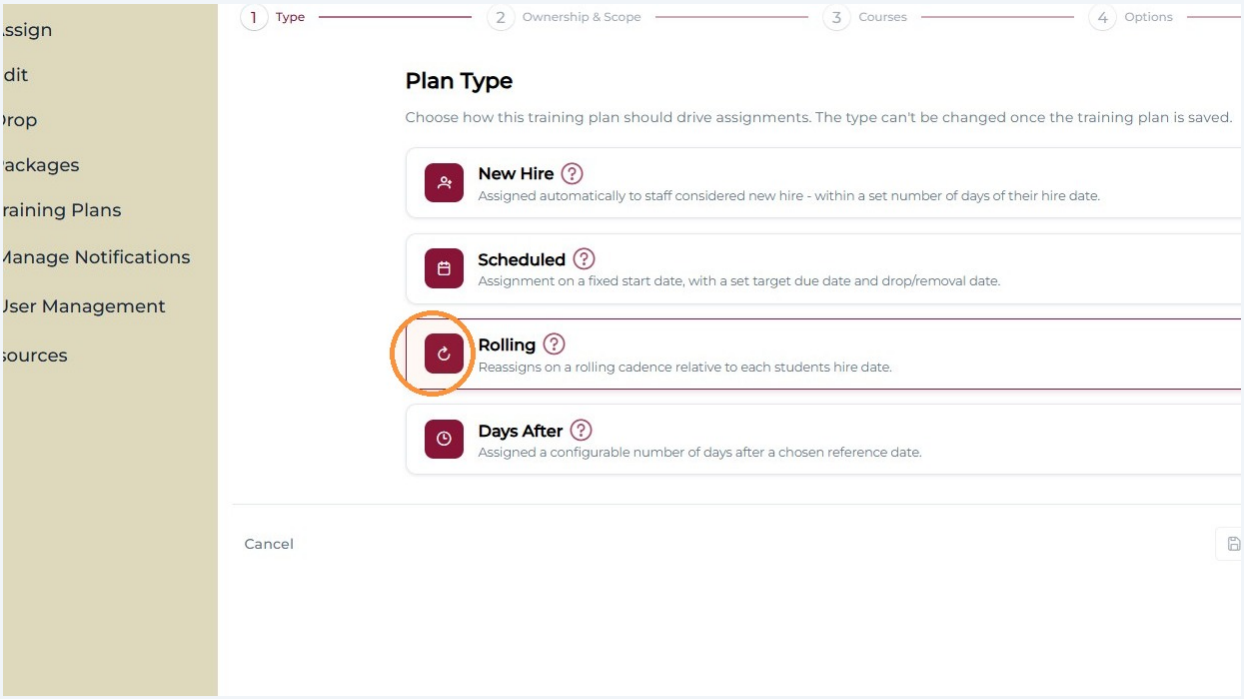
Creating a Rolling Training Plan

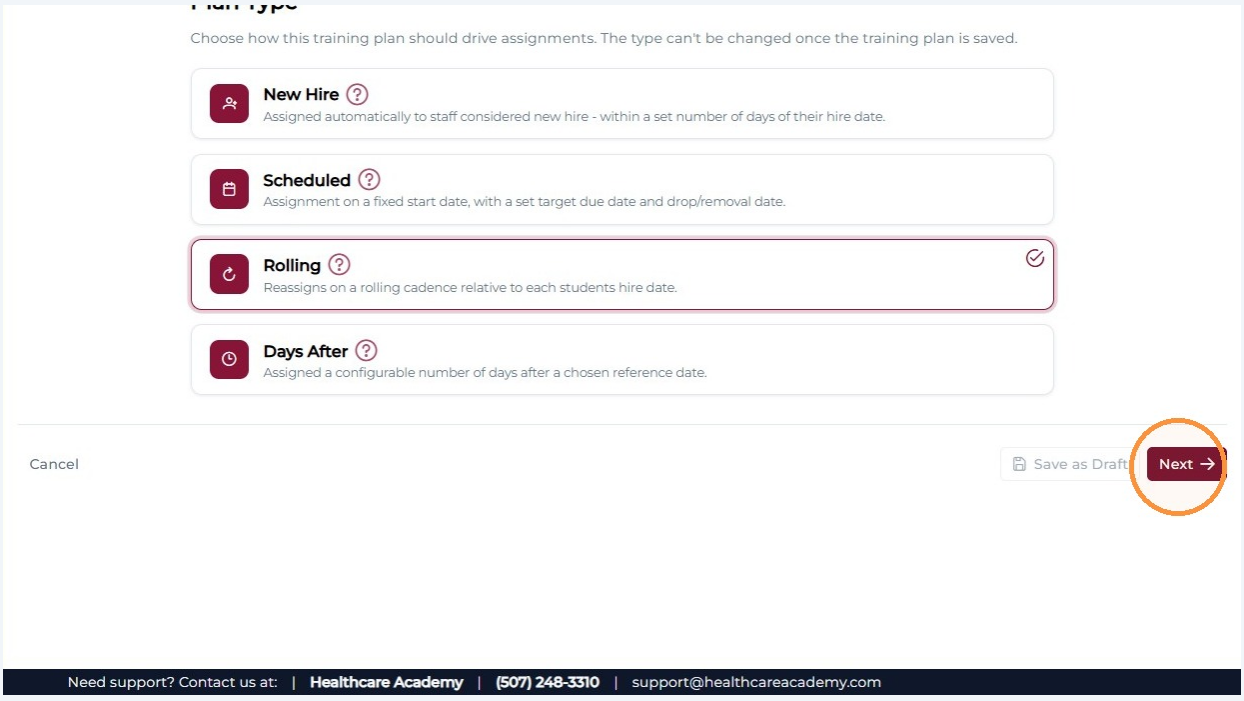
1 Click Add Training Plan



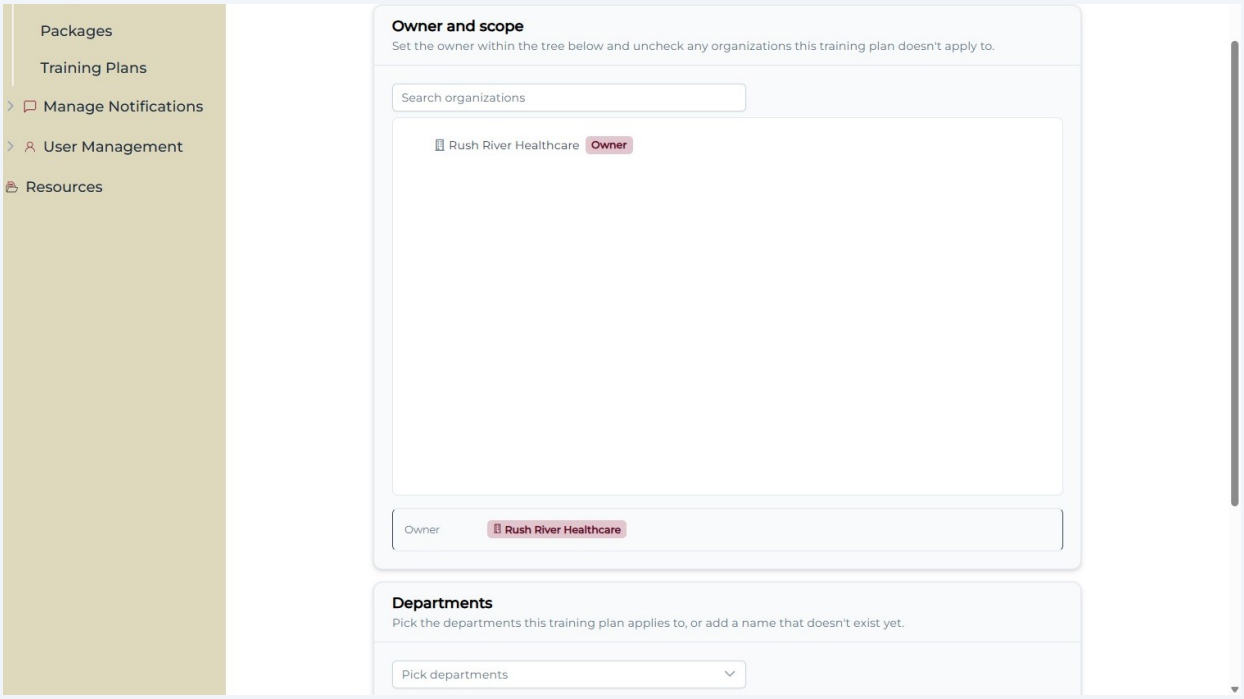
2 Select the Rolling Training Plan



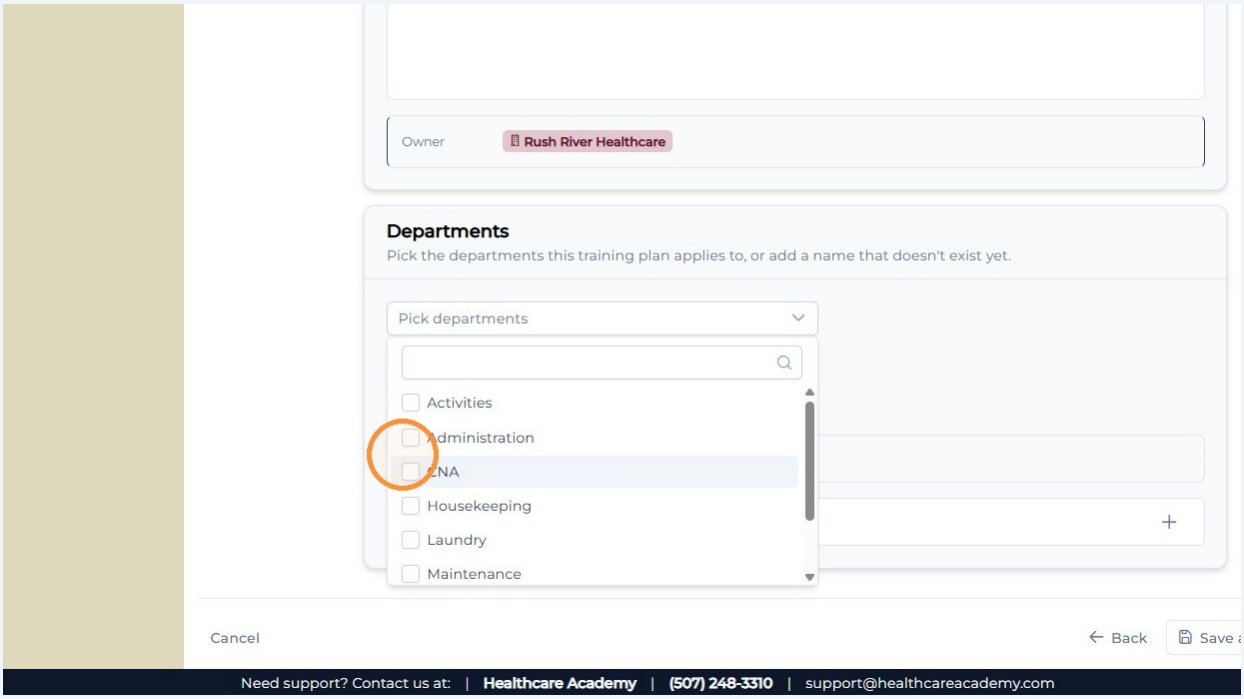
3 Click Next



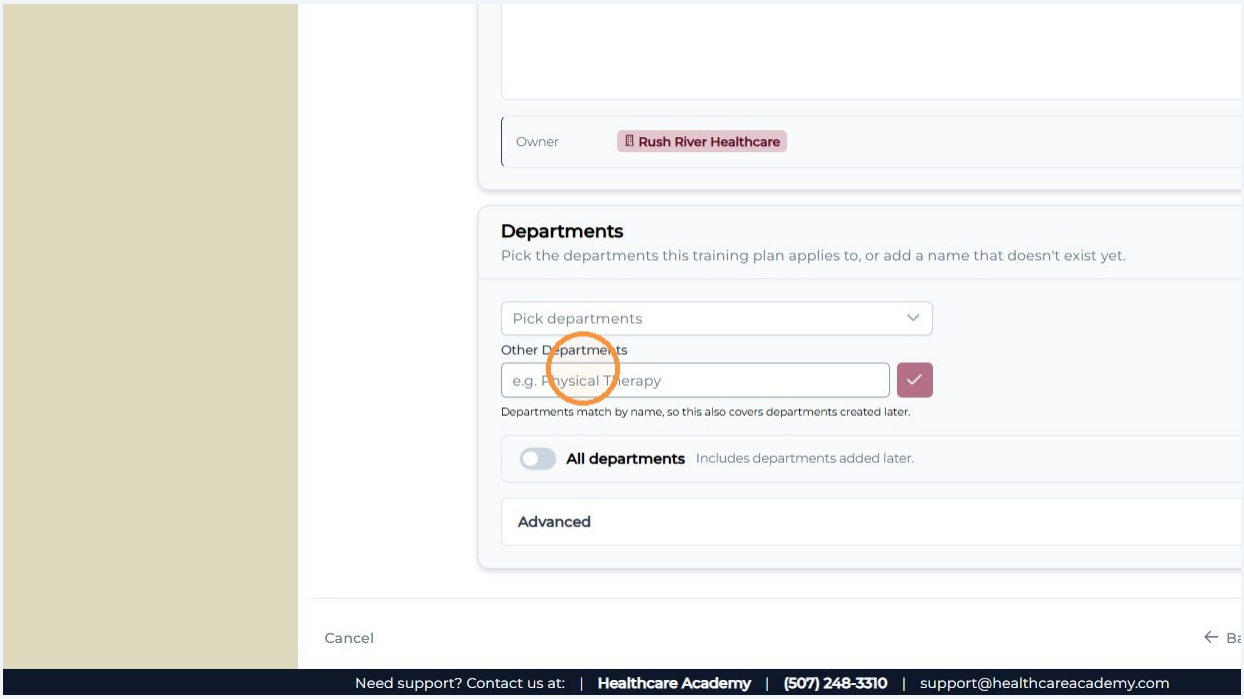
4 Confirm the correct facility is selected if your organization has more than one facility.



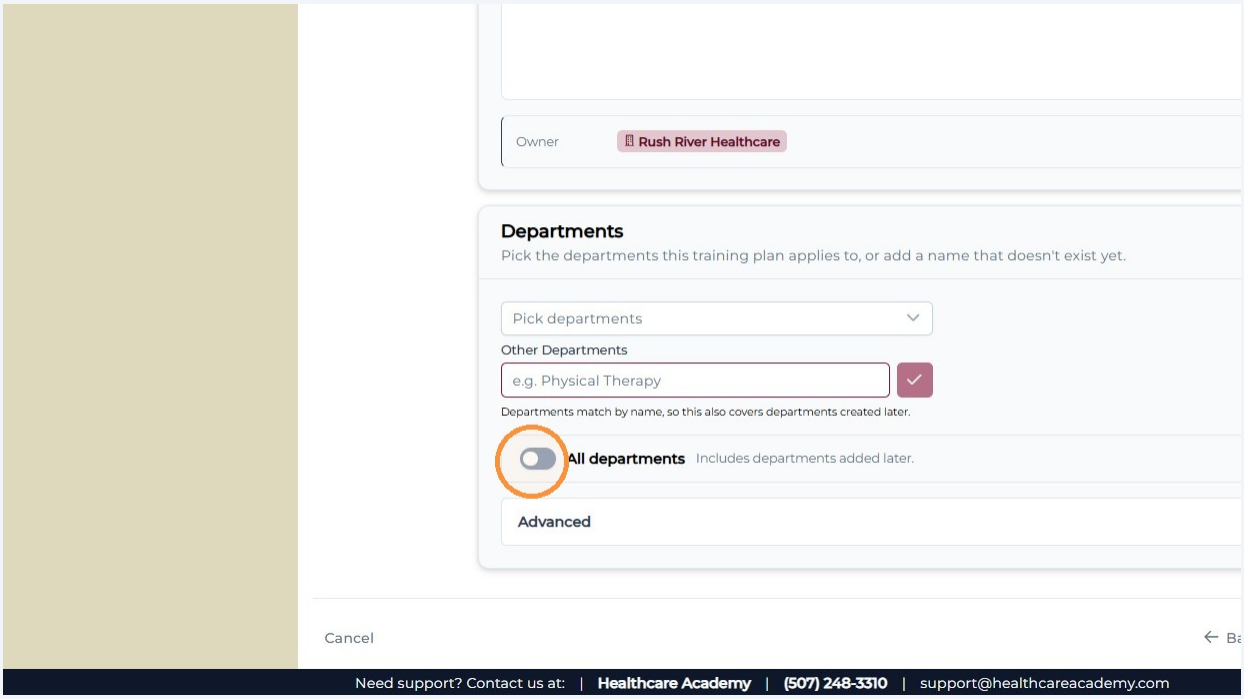
5 If the courses for this Training Plan should only be assigned to specific departments, select the applicable departments.



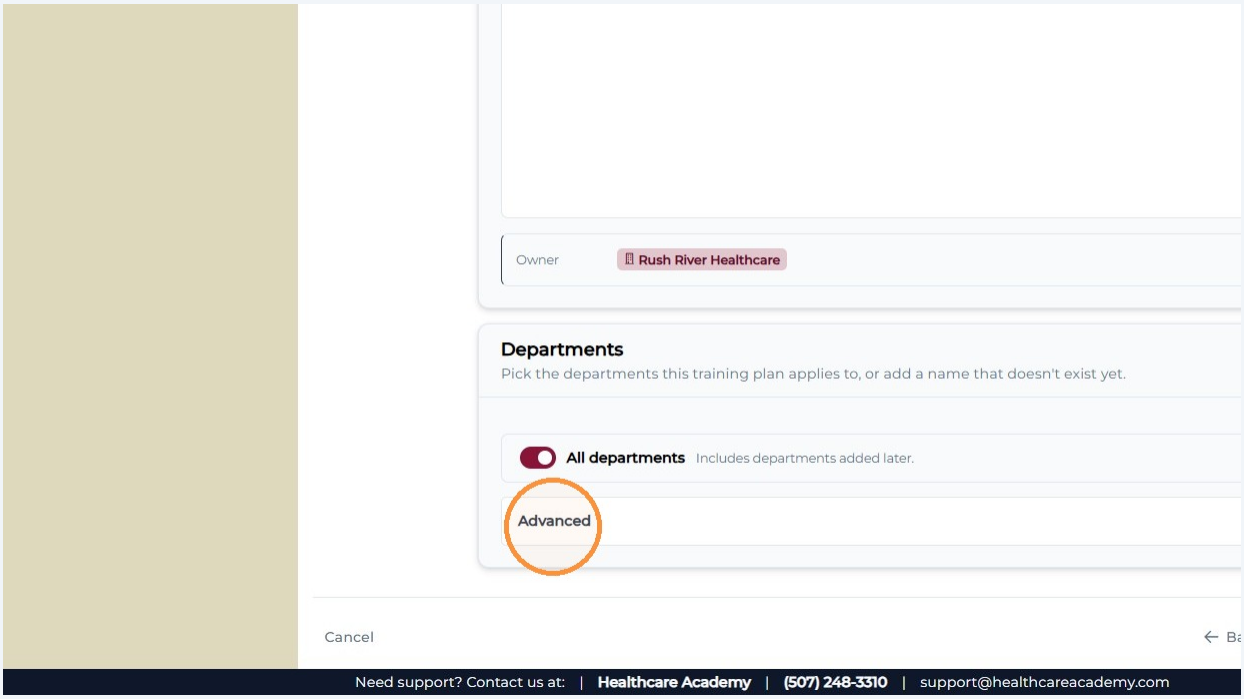
6 If a new department needs to be created for this Training Plan, click the Other Departments field and enter in the new department name.



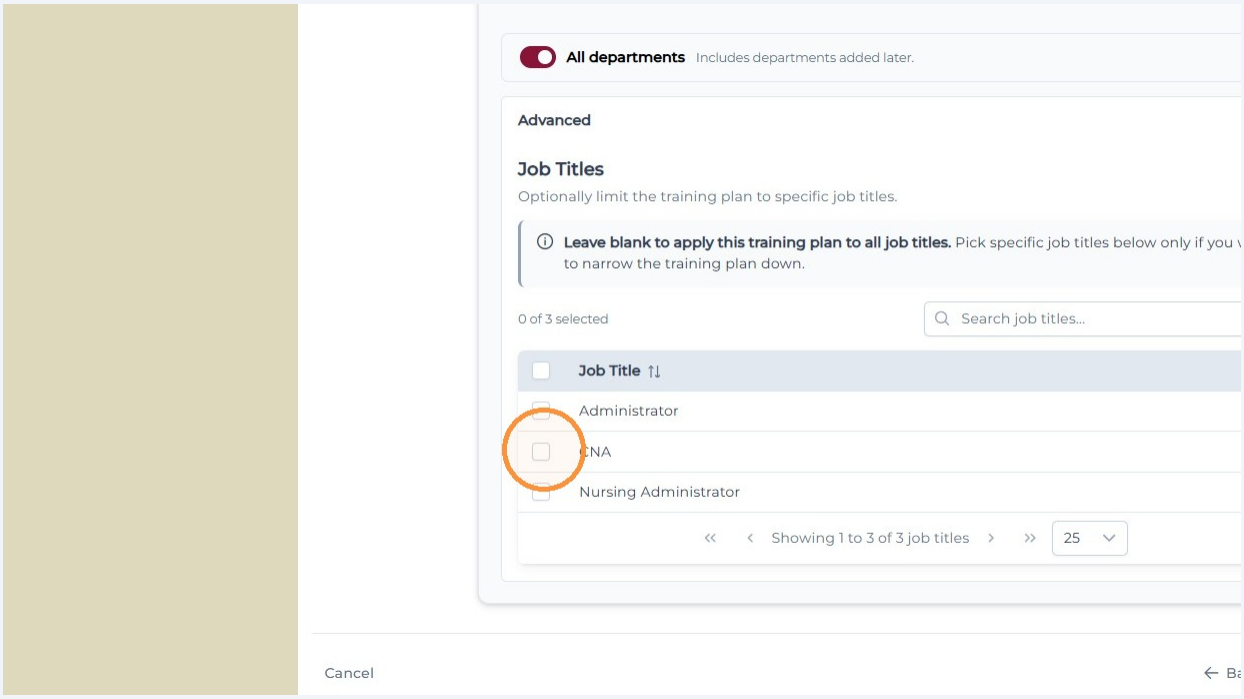
7 If the courses should be assigned to the entire facility, select All Departments at this Facility.



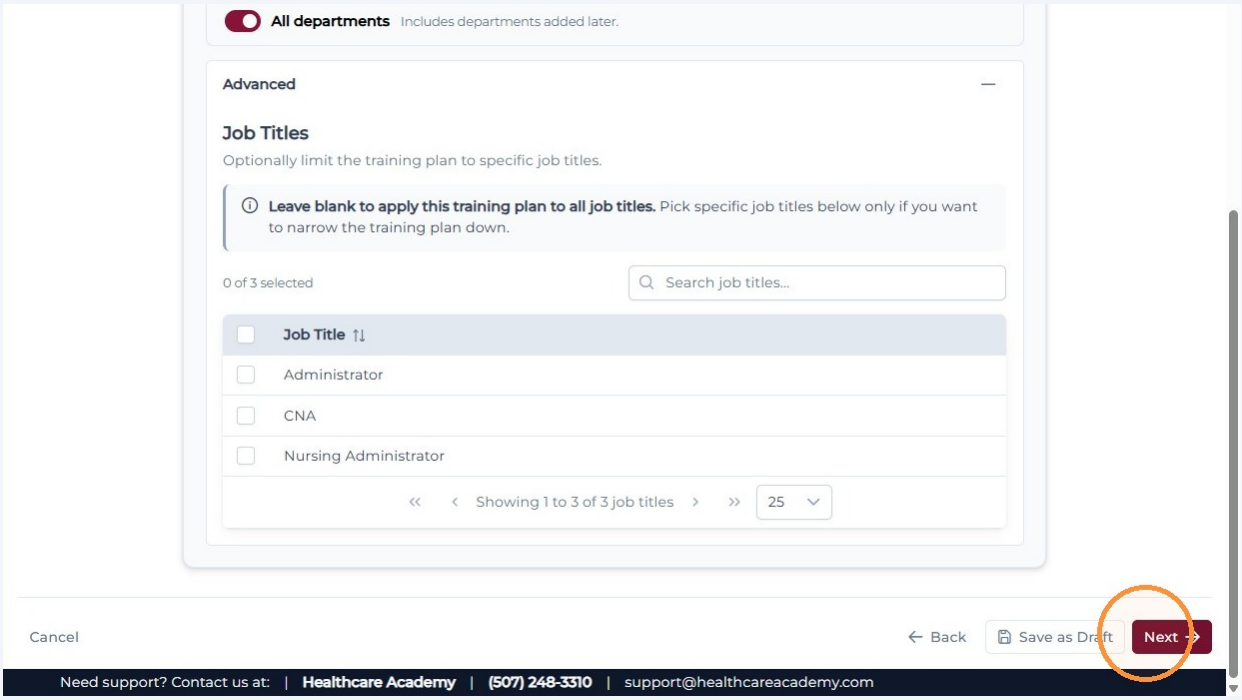
8 If the courses should be assigned to specific job titles only, click Advanced.



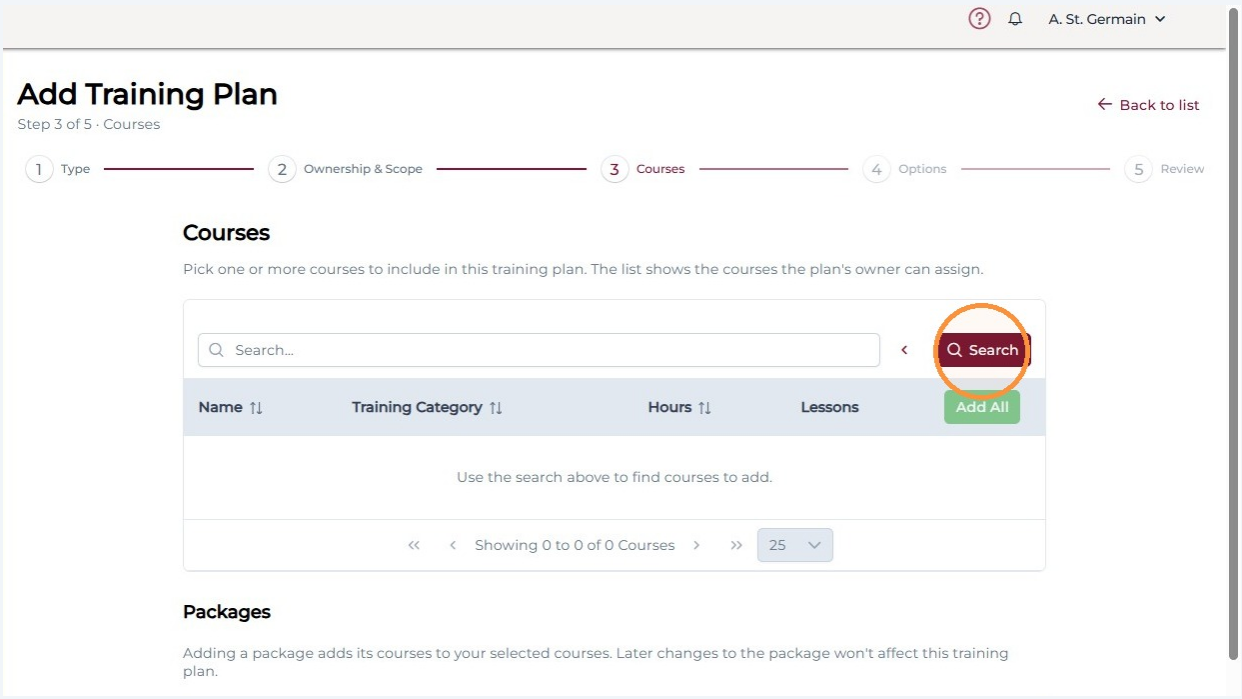
9 From here you can select the specific job titles.



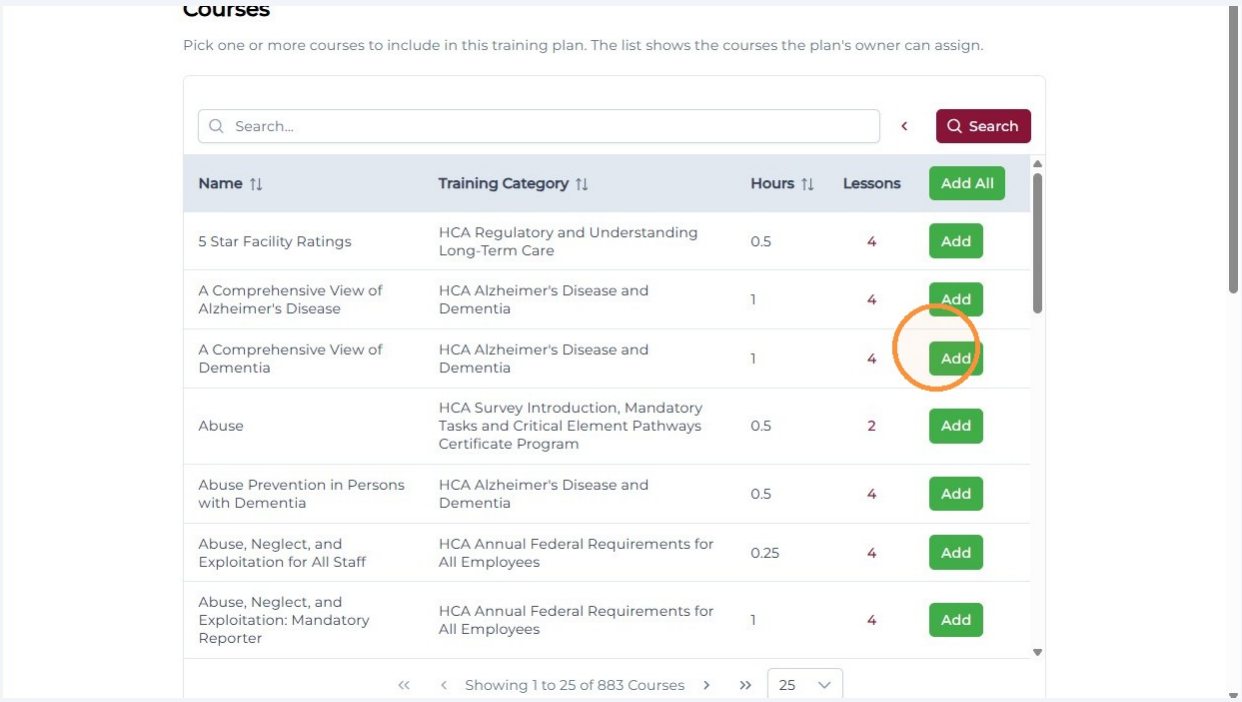
10 Once the correct departments have been selected, click Next.



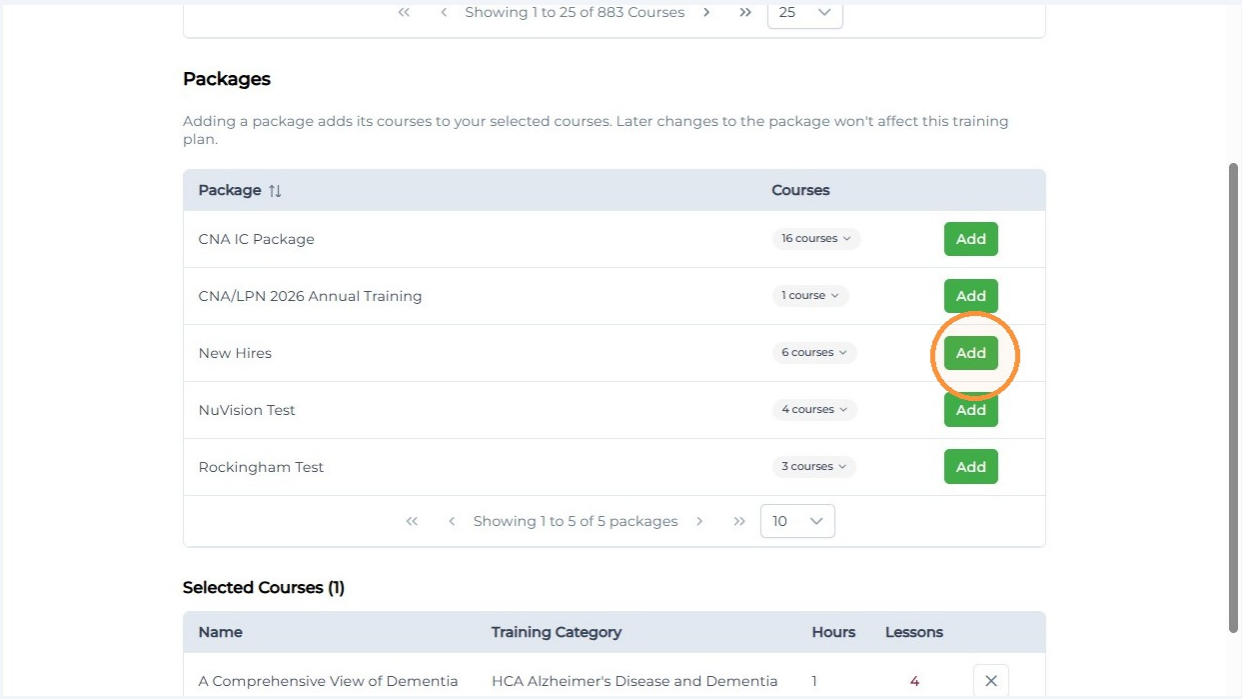
11 Search for the courses you would like to add to the Training Plan.



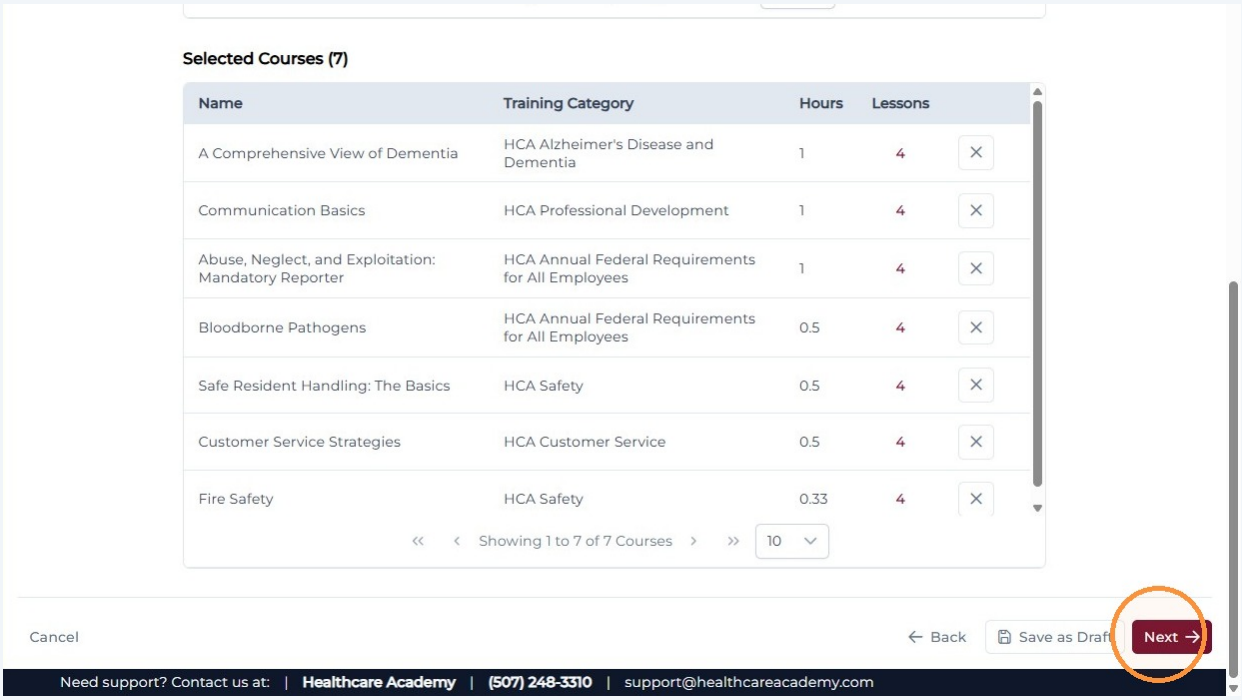
12 Click Add next to each course you would like to include.



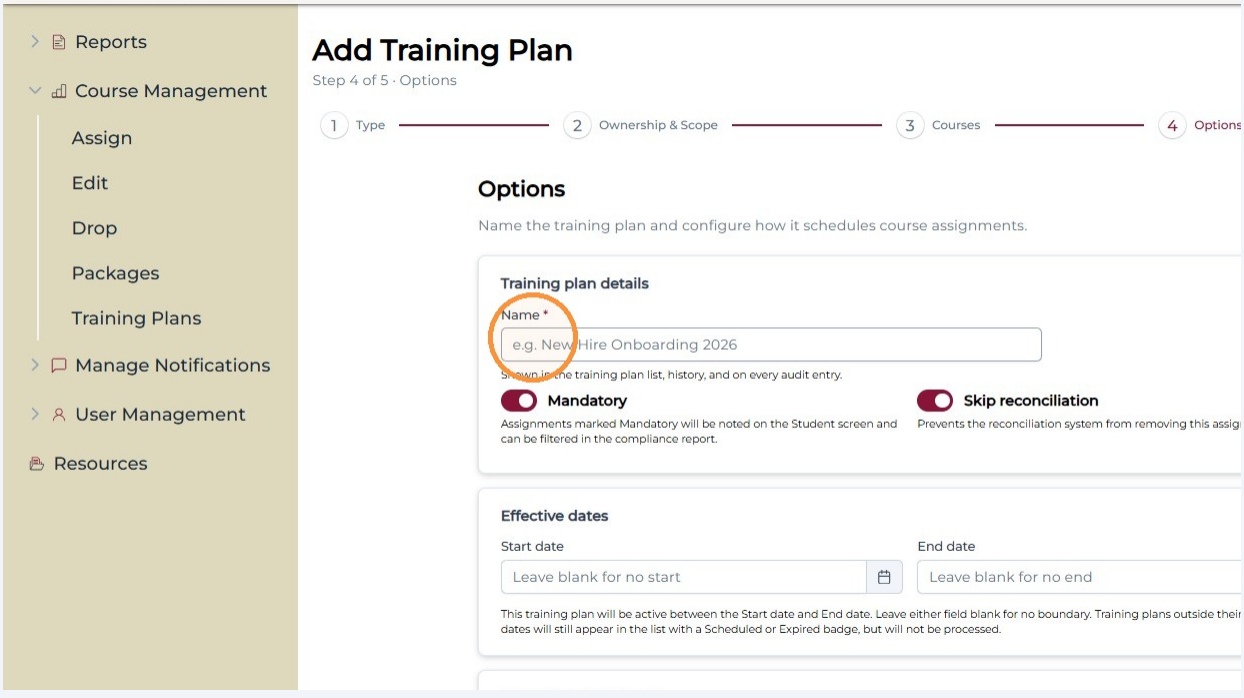
13 If you would like to assign a package, click Add to select the appropriate package.



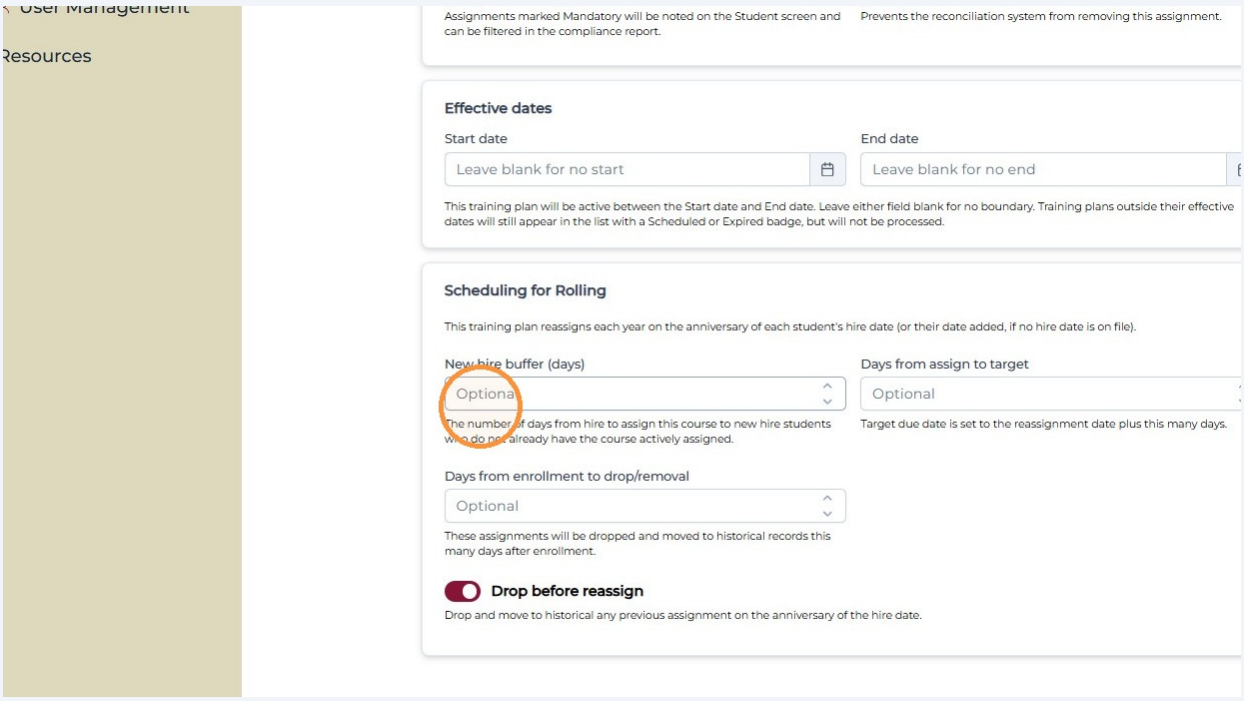
14 Once all courses have been added, click Next.



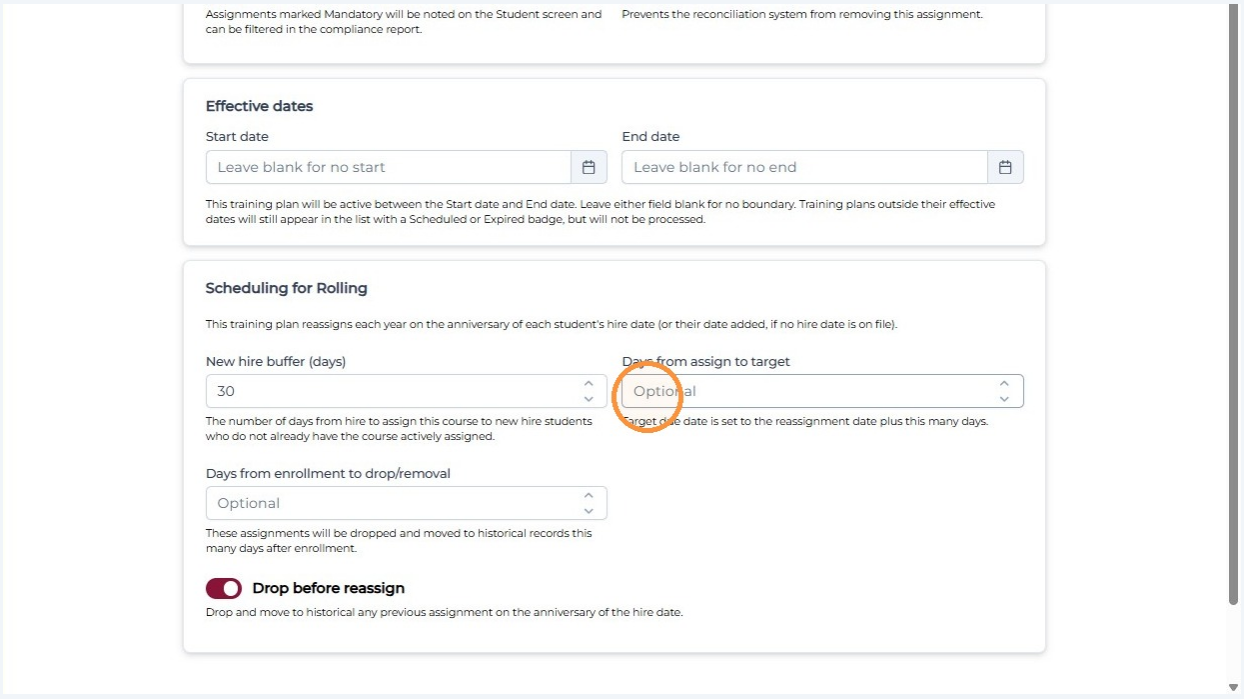
15 Enter a name for the Training Plan. Review the Mandatory and Reconciliation settings to ensure they are configured correctly for the plan. The Effective Start Date and Effective End Date are optional and can be configured based on your organization's needs.



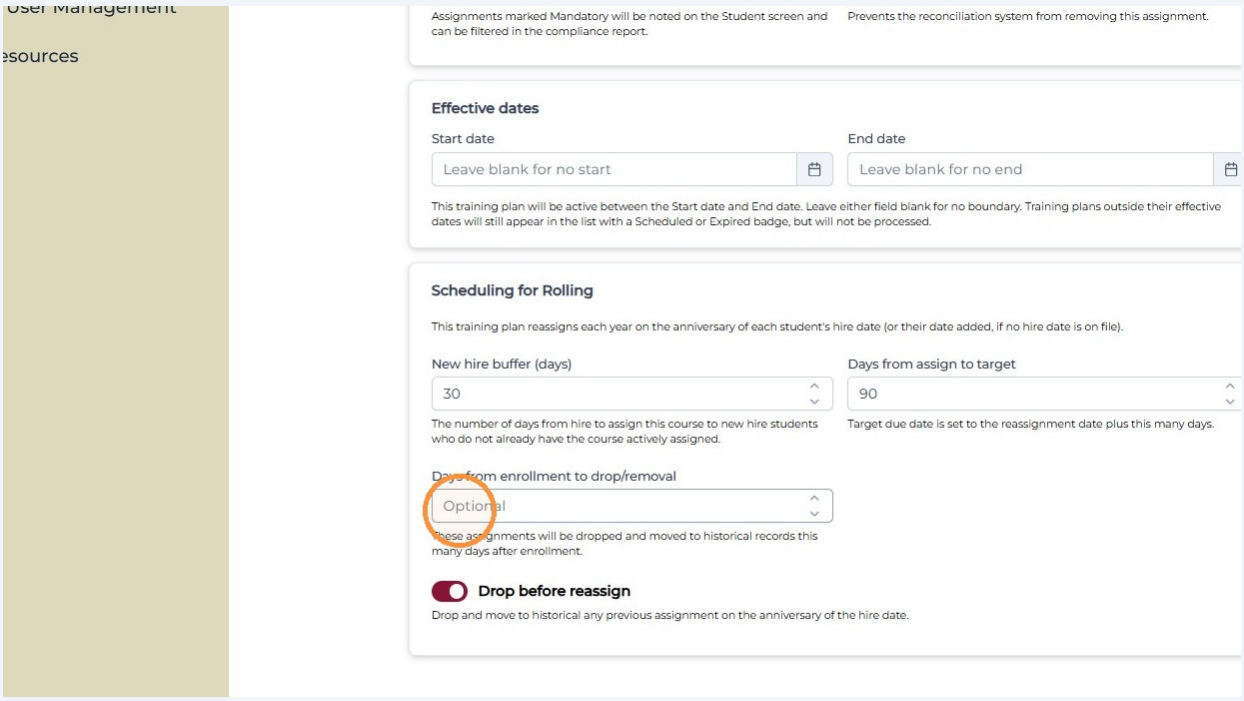
16 Enter the appropriate New Hire Buffer Days if applicable.



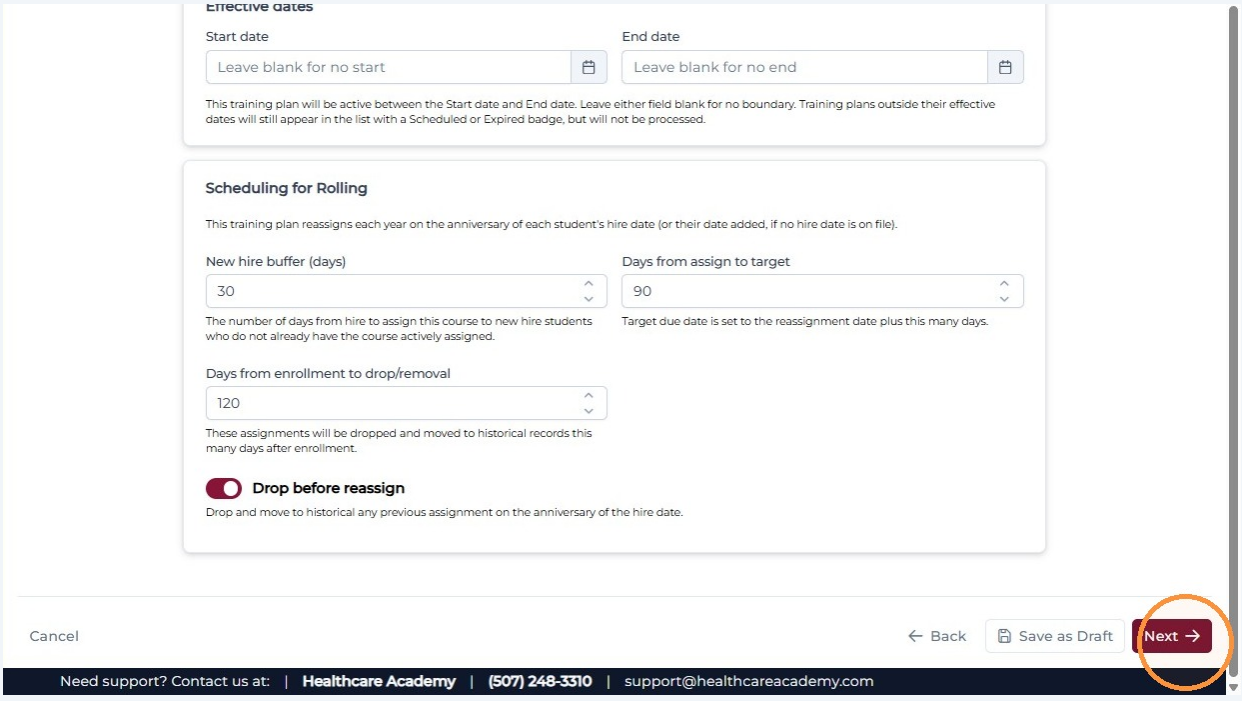
17 Enter the appropriate amount of days from assign to target.



18 Enter the appropriate amount of days from enrollment to drop if applicable.



19 Click Next



20 Review the Training Plan and either click Save as Draft or Save Training Plan.

