



# Learning Management System (“LMS”)

## User Manual: Manager

DRAFT

V NLFMG-03092017-1



## INTRODUCTION

This guide provides information on how to use the Learnsoft Learning Management System's (LMS) new, Task-Centric approach and updated design specifically focusing on functions for the **Manager**. The system has been enhanced to make the Manager experience more intuitive and give you quicker access to complete the training and educational tasks of your team.

This guide assumes you have already had experience with the system as a **User**. If not, please see the *Learning Management System ("LMS") – User Manual: Standard User*. Only Manager-related tasks, functions and features will be highlighted in this guide.

## OVERVIEW TAB – MANAGER VIEW

Upon logging in you will be presented with an "Overview" of your LMS course and assignment data as a **User**. To see the **Manager View**, click on the **Group** dropdown box in the upper right hand corner and select **Manager**.

TESTMGRU TESTMGRU | Log Out

Overview Profile Search Analytics Team Reports

Group Manager

216 Upcoming Courses  
91 Online  
125 Classroom

0 Due Soon / 0 Expired

0 Courses Due  
0 Online Due  
0 Classroom Due  
0 Course(s) Needing Approval

Pending Certifications 0

Employee Listing 30

Incomplete Evaluations 5

Total Delinquent Users 0

You are up to date!

March 2017

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
|     |     |     | 1   | 2   | 3   | 4   |
| 5   | 6   | 7   | 8   | 9   | 10  | 11  |
| 12  | 13  | 14  | 15  | 16  | 17  | 18  |
| 19  | 20  | 21  | 22  | 23  | 24  | 25  |
| 26  | 27  | 28  | 29  | 30  | 31  |     |

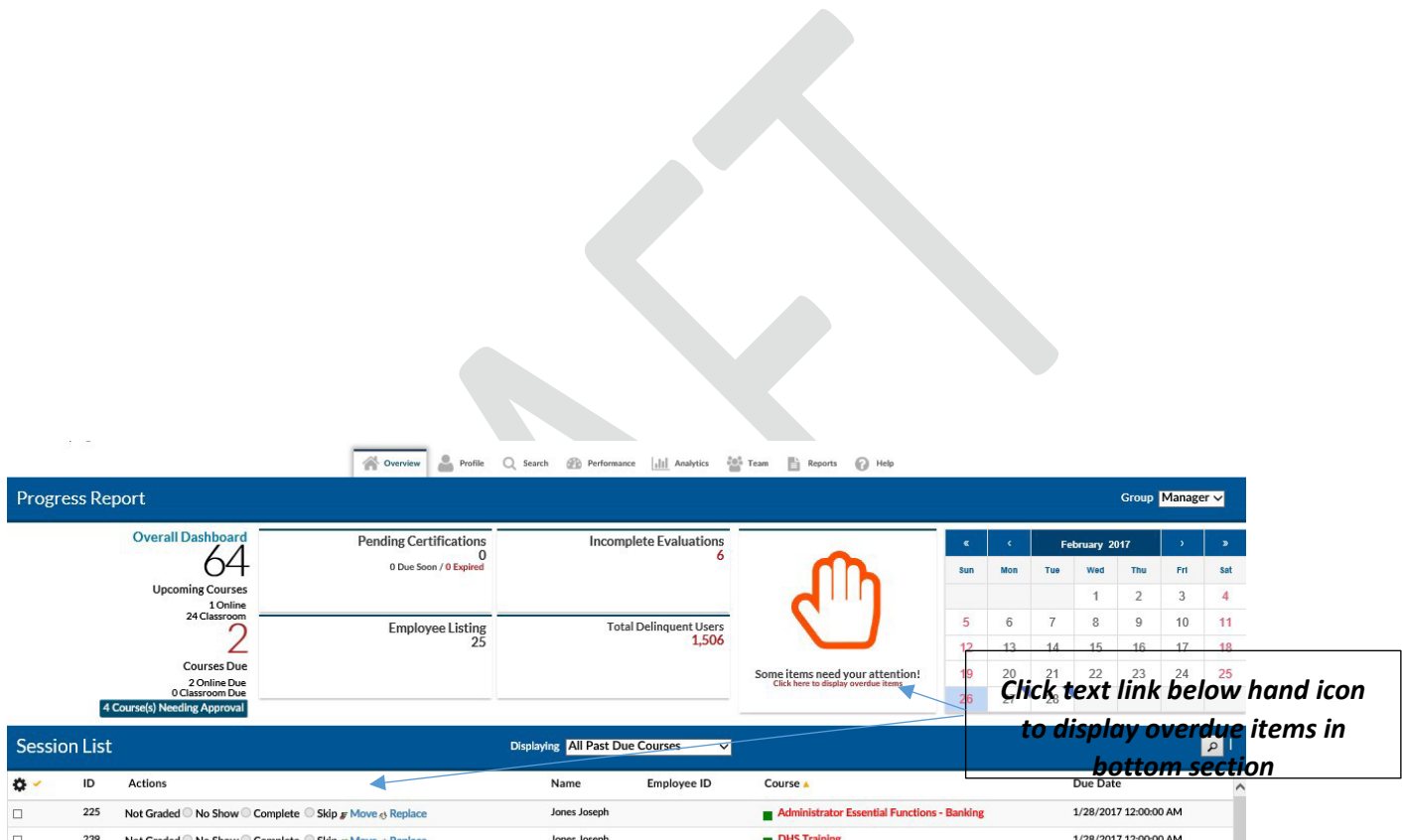
User List

|                          | Employee ID | Name              | User Name |
|--------------------------|-------------|-------------------|-----------|
| <input type="checkbox"/> | testinsa    | testinsa testinsa | testinsa  |
| <input type="checkbox"/> | testinsb    | testinsb testinsb | testinsb  |
| <input type="checkbox"/> | testinsc    | testinsc testinsc | testinsc  |
| <input type="checkbox"/> | testinsd    | testinsd testinsd | testinsd  |
| <input type="checkbox"/> | testinse    | testinse testinse | testinse  |
| <input type="checkbox"/> | testinsf    | testinsf testinsf | testinsf  |
| <input type="checkbox"/> | testinsg    | testinsg testinsg | testinsg  |
| <input type="checkbox"/> | testinsh    | testinsh testinsh | testinsh  |
| <input type="checkbox"/> | testinsi    | testinsi testinsi | testinsi  |
| <input type="checkbox"/> | testinsj    | testinsj testinsj | testinsj  |

The top section, **Overall Dashboard**, provides key metrics pertaining to the course, certification and evaluation completion status of your team members, an overall status icon and a calendar of available courses. By default, the bottom Section, **User List**, provides an alphabetical listing of your team sorted by last name. The title of the bottom section and information displayed will vary depending on Metric or dropdown selected.

## Overview Tab – Overall Dashboard: Status Icon

The Status Icon allows the **Manager**, in a single glance, to see if their team members are up-to-date or overdue in completing their learning related tasks (*At this point, this focuses solely on Overdue Class Sessions*).



**Progress Report** Group **Manager** ▼

**Overall Dashboard**  
**64**  
 Upcoming Courses  
 1 Online  
 24 Classroom

**2**  
 Courses Due  
 2 Online Due  
 0 Classroom Due  
 4 Course(s) Needing Approval

Pending Certifications **0**  
 0 Due Soon / 0 Expired

Employee Listing **25**

Incomplete Evaluations **6**

Total Delinquent Users **1,506**

**Some items need your attention!**  
 Click here to display overdue items

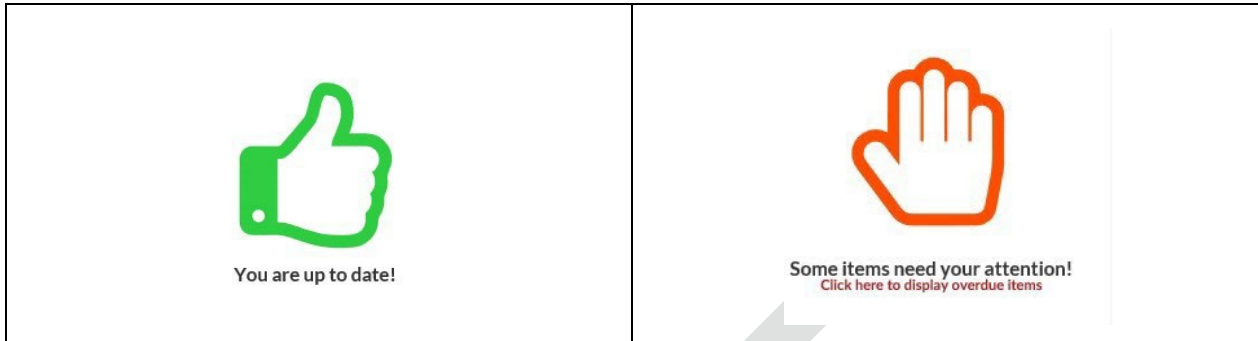
**Click text link below hand icon to display overdue items in bottom section**

**Session List** Displaying: All Past Due Courses ▼

| ID  | Actions   | Name         | Employee ID | Course                                      | Due Date              |
|-----|---|--------------|-------------|---|-----------------------|
| 225 | Not Graded <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip # <input type="radio"/> Move <input type="radio"/> Replace | Jones Joseph |             | Administrator Essential Functions - Banking | 1/28/2017 12:00:00 AM |
| 239 | Not Graded <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip # <input type="radio"/> Move <input type="radio"/> Replace | Jones Joseph |             | DHS Training                                | 1/28/2017 12:00:00 AM |

If this Status Icon displays a Green Thumbs Up, then items are up-to-date.

If this Status Icon displays an orange-reddish open hand (aka “stop”), then items are overdue. Click the text link below the hand to display the overdue items in the bottom section.

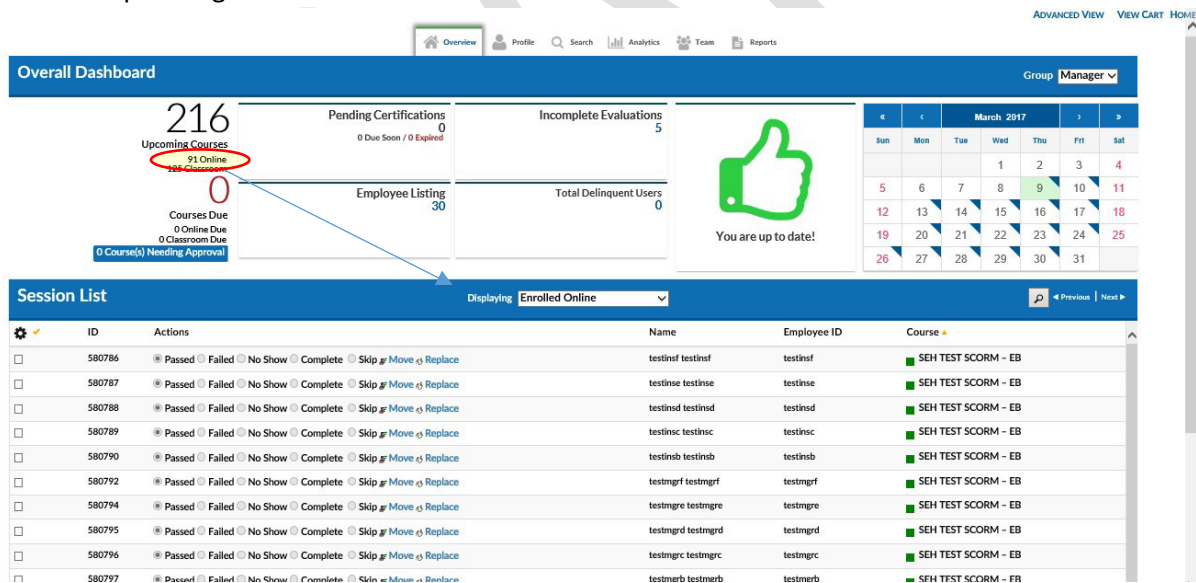


### Overview Tab – Overall Dashboard - Metrics

The top left section of the **Overall Dashboard** provides *Manager Metrics*, a numerical listing of your Team’s course, certification, evaluation and team member statistics.

Click on any of the numeric hyperlinks to drill down to specific information, which will be shown in the bottom section.

For example, if you click on the “**91 Online**” **Upcoming Courses** hyperlink, the bottom section will update to a **Session List** and show you a listing of the two (91) class sessions which your Team members are enrolled and upcoming.



| ID     | Actions  | Name              | Employee ID | Course              |
|--------|--|-------------------|-------------|---------------------|
| 580786 | Passed Failed No Show Complete Skip # Move ↻ Replace | testinsf testinsf | testinsf    | SEH TEST SCORM - EB |
| 580787 | Passed Failed No Show Complete Skip # Move ↻ Replace | testinsc testinsc | testinsc    | SEH TEST SCORM - EB |
| 580788 | Passed Failed No Show Complete Skip # Move ↻ Replace | testinsd testinsd | testinsd    | SEH TEST SCORM - EB |
| 580789 | Passed Failed No Show Complete Skip # Move ↻ Replace | testinsc testinsc | testinsc    | SEH TEST SCORM - EB |
| 580790 | Passed Failed No Show Complete Skip # Move ↻ Replace | testinsb testinsb | testinsb    | SEH TEST SCORM - EB |
| 580792 | Passed Failed No Show Complete Skip # Move ↻ Replace | testmgrf testmgrf | testmgrf    | SEH TEST SCORM - EB |
| 580794 | Passed Failed No Show Complete Skip # Move ↻ Replace | testmgre testmgre | testmgre    | SEH TEST SCORM - EB |
| 580795 | Passed Failed No Show Complete Skip # Move ↻ Replace | testmgrd testmgrd | testmgrd    | SEH TEST SCORM - EB |
| 580796 | Passed Failed No Show Complete Skip # Move ↻ Replace | testmgrc testmgrc | testmgrc    | SEH TEST SCORM - EB |
| 580797 | Passed Failed No Show Complete Skip # Move ↻ Replace | testmerb testmerb | testmerb    | SEH TEST SCORM - EB |

### Manager Metrics - Definitions

|  |   |
|--|---|
| <h1>64</h1> <p><b>Upcoming Courses</b><br/>1 Online<br/>24 Classroom</p> | <p><b>Upcoming Course</b> – A count of both Online and Classroom courses for which your team members been assigned or enrolled, but have not yet completed and whose deadlines have not passed nor whose class dates have passed</p> <ul style="list-style-type: none"> <li><b>Online</b> – A count of assigned / enrolled online courses only</li> </ul> |
|--|---|

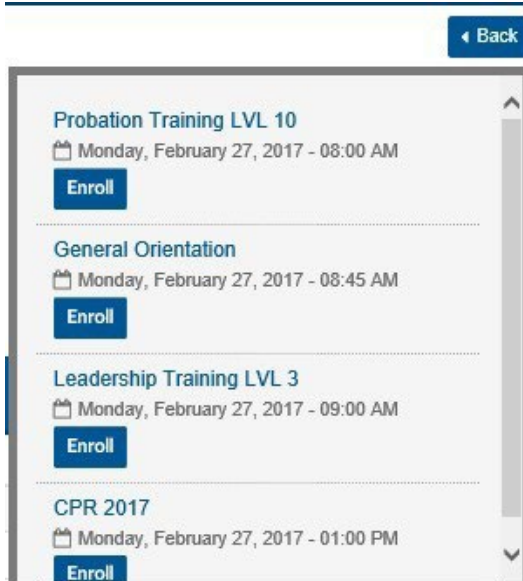
|   |  |
|---|--|
|   | <ul style="list-style-type: none"> <li>• <b>Classroom</b> - A count of assigned / enrolled Classroom courses only</li> </ul>   |
| <p style="text-align: center; font-size: 2em; color: red;">2</p> <p style="text-align: center;"><b>Courses Due</b></p> <p style="text-align: center;">2 Online Due<br/>0 Classroom Due</p>  | <p><b>Courses Due</b> – A count of Online and Classroom courses which your team members have not completed, but whose scheduled class time or assigned deadlines have passed.</p> <ul style="list-style-type: none"> <li>• <b>Online</b> – A count of your team’s online overdue courses only</li> <li>• <b>Classroom</b> - A count of your team’s Classroom overdue courses only</li> </ul> |
| <p style="text-align: center;"><b>Pending Certifications</b></p> <p style="text-align: center; font-size: 2em; color: red;">0</p> <p style="text-align: center;">0 Due Soon / 0 Expired</p> | <p><b>Pending Certifications</b> – A count of certifications for which your team members have enrolled, but note yet completed.</p> <ul style="list-style-type: none"> <li>• <b>Due Soon</b> – A count of Certifications with due dates after the current date</li> <li>• <b>Expired</b> – A count of Certifications with due dates that have passed and are overdue</li> </ul>              |
| <p style="text-align: center;"><b>Incomplete Evaluations</b></p> <p style="text-align: center; font-size: 2em; color: red;">6</p>   | <p><b>Incomplete Evaluations</b> – Evaluations which your team members still need to complete. Note: For some classes, your team will not receive course credit unless the associated evaluation has been completed.</p>   |
| <p style="text-align: center;"><b>Employee Listing</b></p> <p style="text-align: center; font-size: 2em; color: red;">25</p>  | <p><b>Employee Listing</b> – A total count of your active team members in the LMS system</p>   |
| <p style="text-align: center;"><b>Total Delinquent Users</b></p> <p style="text-align: center; font-size: 2em; color: red;">1,506</p>   | <p><b>Total Delinquent Users</b> – A count of team members who have overdue learning activities.</p>   |

## Overview Tab – Overall Dashboard: Manager Calendar

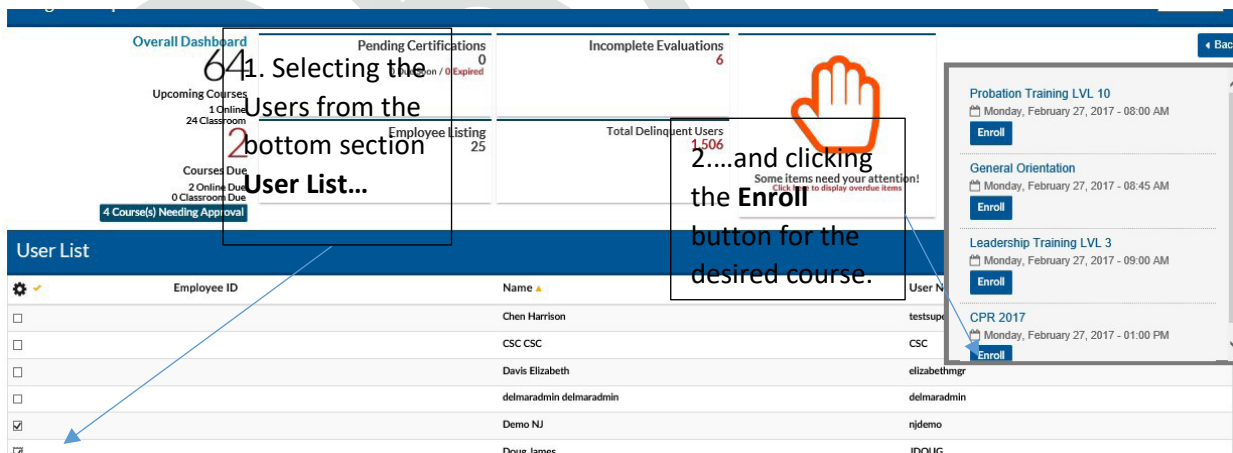
The Calendar in the top right corner displays the current month. A blue triangle will appear on days where there are classes available for you to enroll yourself and your Team members. You can quickly view summary information by rolling your mouse over the specific day.

| Overview – Manager View - Calendar  | Calendar – Rolling over date with blue shading                                       |
|---|--|
|  |  |

Clicking on the day will bring up additional course details for all such courses (*Scroll to see additional courses and click the **Back** button to return to the Overall Dashboard*).



You can also directly enroll your team members into a selected course instance scheduled for that day by....



1. Selecting the Users from the bottom section of the User List...

2....and clicking the Enroll button for the desired course.

| Employee ID                         | Name                    | User ID     |
|-------------------------------------|-------------------------|-------------|
| <input type="checkbox"/>            | Chen Harrison           | teststupa   |
| <input type="checkbox"/>            | CSC CSC                 | CSC         |
| <input type="checkbox"/>            | Davis Elizabeth         | elizabethmg |
| <input type="checkbox"/>            | delmaradmin delmaradmin | delmaradmin |
| <input checked="" type="checkbox"/> | Demo NJ                 | rjdemo      |
| <input type="checkbox"/>            | Douz James              | JDOUG       |

After clicking Enroll, the screen will refresh and a confirmation message will appear in the top of the screen either confirming that selected users were enrolled in the selected course or providing reasons why they were unable to be enrolled.



## Overview Tab – User List / Session List

By default, the bottom of the **Overview** Tab shows a team listing (**User List**).

| User List                |             |                   |           | New | Actions | Previous | Next |
|--------------------------|-------------|-------------------|-----------|-----|---------|----------|------|
|                          | Employee ID | Name              | User Name |     |         |          |      |
| <input type="checkbox"/> | testinsa    | testinsa testinsa | testinsa  |     |         |          |      |
| <input type="checkbox"/> | testinsb    | testinsb testinsb | testinsb  |     |         |          |      |
| <input type="checkbox"/> | testinsc    | testinsc testinsc | testinsc  |     |         |          |      |
| <input type="checkbox"/> | testinsd    | testinsd testinsd | testinsd  |     |         |          |      |
| <input type="checkbox"/> | testinse    | testinse testinse | testinse  |     |         |          |      |
| <input type="checkbox"/> | testinsf    | testinsf testinsf | testinsf  |     |         |          |      |
| <input type="checkbox"/> | testinsg    | testinsg testinsg | testinsg  |     |         |          |      |
| <input type="checkbox"/> | testinsh    | testinsh testinsh | testinsh  |     |         |          |      |
| <input type="checkbox"/> | testinsi    | testinsi testinsi | testinsi  |     |         |          |      |
| <input type="checkbox"/> | testinsj    | testinsj testinsj | testinsj  |     |         |          |      |

If course enrollment related Metrics are selected, it will show a listing of specific course session information (**Session List**).

| Session List             |        |  |                   |             |                     | Displaying: Enrolled | Previous | Next |
|--------------------------|--------|--|-------------------|-------------|---------------------|----------------------|----------|------|
|                          | ID     | Actions  | Name              | Employee ID | Course              |                      |          |      |
| <input type="checkbox"/> | 580786 | Passed Failed No Show Complete Skip # Move Replace | testinsf testinsf | testinsf    | SEH TEST SCORM - EB |                      |          |      |
| <input type="checkbox"/> | 580787 | Passed Failed No Show Complete Skip # Move Replace | testinse testinse | testinse    | SEH TEST SCORM - EB |                      |          |      |
| <input type="checkbox"/> | 580788 | Passed Failed No Show Complete Skip # Move Replace | testinsd testinsd | testinsd    | SEH TEST SCORM - EB |                      |          |      |
| <input type="checkbox"/> | 580789 | Passed Failed No Show Complete Skip # Move Replace | testinsc testinsc | testinsc    | SEH TEST SCORM - EB |                      |          |      |
| <input type="checkbox"/> | 580790 | Passed Failed No Show Complete Skip # Move Replace | testinsb testinsb | testinsb    | SEH TEST SCORM - EB |                      |          |      |
| <input type="checkbox"/> | 580792 | Passed Failed No Show Complete Skip # Move Replace | testmgrf testmgrf | testmgrf    | SEH TEST SCORM - EB |                      |          |      |
| <input type="checkbox"/> | 580794 | Passed Failed No Show Complete Skip # Move Replace | testmgre testmgre | testmgre    | SEH TEST SCORM - EB |                      |          |      |
| <input type="checkbox"/> | 580795 | Passed Failed No Show Complete Skip # Move Replace | testmgrd testmgrd | testmgrd    | SEH TEST SCORM - EB |                      |          |      |
| <input type="checkbox"/> | 580796 | Passed Failed No Show Complete Skip # Move Replace | testmgrc testmgrc | testmgrc    | SEH TEST SCORM - EB |                      |          |      |
| <input type="checkbox"/> | 580797 | Passed Failed No Show Complete Skip # Move Replace | testmrk testmrk   | testmrk     | SEH TEST SCORM - EB |                      |          |      |

Below you will find details for completing tasks in either mode:

### [Overview Tab – User List View](#)


The default when selecting the **Manager** view or when User data is selected, the bottom section will show the **User List**. The default will show the **Employee ID**, **Name** and **User ID** information of your Team members.



| User List                           |                         |                 |                     |
|-------------------------------------|-------------------------|-----------------|---------------------|
| Employee ID                         | Name                    | User Name       |                     |
| <input type="checkbox"/>            | Chen Harrison           | testsuper001    |                     |
| <input type="checkbox"/>            | CSC CSC                 | CSC             |                     |
| <input type="checkbox"/>            | Davis Elizabeth         | elizabethmgr    |                     |
| <input type="checkbox"/>            | delmaradmin delmaradmin | delmaradmin     |                     |
| <input checked="" type="checkbox"/> | Demo NJ                 | njdemo          |                     |
| <input checked="" type="checkbox"/> | Doug James              | JDOUG           |                     |
| <input type="checkbox"/>            | wgibbons@sbcscd.org     | Gibbons William | wgibbons@sbcscd.org |
| <input type="checkbox"/>            | Grande Doris            | DGRANDE1        |                     |
| <input type="checkbox"/>            | Hernandez Bob           | tmsmanager      |                     |
| <input type="checkbox"/>            | Jones Joseph            | JJONES          |                     |
| <input type="checkbox"/>            | Ins elizabeth           | elizabethms     |                     |
| <input type="checkbox"/>            | Martinez Selena         | testuser002     |                     |
| <input type="checkbox"/>            | Michael Winn            | mwin            |                     |
| <input type="checkbox"/>            | Paige LaWanda           | testdirect001   |                     |
| <input type="checkbox"/>            | ProbationII Manager     | MgrProbationII  |                     |
| <input type="checkbox"/>            | Rogers Kelly            | testuser003     |                     |

26 Users (2 Selected) - Page 1 Of 2

When hovering the mouse over the **Name** column, a rollover **User Overview** will display on the right side. This will update when changing from user to user.

| User List                           |                         |                 |  |
|-------------------------------------|-------------------------|-----------------|--|
| Employee ID                         | Name                    | User Name       | Overview   |
| <input type="checkbox"/>            | Chen Harrison           | testsuper001    |  |
| <input type="checkbox"/>            | CSC CSC                 | CSC             |  |
| <input type="checkbox"/>            | Davis Elizabeth         | elizabethmgr    |  |
| <input type="checkbox"/>            | delmaradmin delmaradmin | delmaradmin     |  |
| <input checked="" type="checkbox"/> | Demo NJ                 | njdemo          | <div data-bbox="1047 997 1356 1344">  <p><b>Demo NJ</b><br/>Civil Service Commission (CSC) Division<br/>aj@learnsoft.com</p> <p>Hire Date: 6/23/2016</p> <p>Courses: 1</p> <p>Assignments: 1</p> <p>Certifications: 1</p> <p>Past Due: 0</p> <p>Completed: 0</p> <p>Total Credits: 0</p> <p>Total Units: 0</p> <p>Details   Print Transcripts</p> </div> |
| <input checked="" type="checkbox"/> | Doug James              | JDOUG           |  |
| <input type="checkbox"/>            | wgibbons@sbcscd.org     | Gibbons William |  |
| <input type="checkbox"/>            | Grande Doris            | DGRANDE1        |  |
| <input type="checkbox"/>            | Hernandez Bob           | tmsmanager      |  |
| <input type="checkbox"/>            | Jones Joseph            | JJONES          |  |
| <input type="checkbox"/>            | Ins elizabeth           | elizabethms     |  |
| <input type="checkbox"/>            | Martinez Selena         | testuser002     |  |
| <input type="checkbox"/>            | Michael Winn            | mwin            |  |
| <input type="checkbox"/>            | Paige LaWanda           | testdirect001   |  |
| <input type="checkbox"/>            | ProbationII Manager     | MgrProbationII  |  |
| <input type="checkbox"/>            | Rogers Kelly            | testuser003     |  |

26 Users (2 Selected) - Page 1 Of 2

Hover over a name and summary information for that team member will display.

Click the **Name** field or the **Details** link to bring up detailed profile info (See **Team tab section**)

Click **Print Transcripts** to bring up a printable version of the User's Transcript

The **User List** data view is configurable. To add desired column data, click on the **gear** icon. This will bring up a checkbox of columns that can be displayed in this particular section. Check the desired data columns and click **Apply**. The screen will refresh with the additional columns displayed.



## User List



- All
- User ID
- Active
- Division
- Last Name
- First Name
- Job Code
- Job Class
- Job Position
- Delete

Apply

| User List   |             |                         |              |  |               | New | Actions | Previous | Next |
|---|-------------|-------------------------|--------------|--|---------------|-----|---------|----------|------|
|   | Employee ID | Name                    | User Name    | Division   | Job Position  |     |         |          |      |
| <input type="checkbox"/>  |             | Chen Harrison           | testsuper001 | Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division | Training M... |     |         |          |      |
| <input type="checkbox"/>  |             | CSC CSC                 | CSC          | Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division |               |     |         |          |      |
| <input type="checkbox"/>  |             | Davis Elizabeth         | elizabethmgr | Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division |               |     |         |          |      |
| <input type="checkbox"/>  |             | delmaradmin delmaradmin | delmaradmin  | Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division |               |     |         |          |      |
| <input checked="" type="checkbox"/>   |             | Demo NJ                 | njdemo       | Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division |               |     |         |          |      |
| <input checked="" type="checkbox"/>   |             | Doug James              | JDOUG        | Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division |               |     |         |          |      |

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**Sort** by Column, by clicking on Column name (or up / down triangle if available). A single click sorts in ascending order. A second click sorts in descending order.

| Sort by <b>Name</b> Column in ascending order  | Sort by <b>Name</b> Column in descending order   |
|--|--|
| <p><b>Name</b> ▲</p> <p>Account Admin1</p> <p>Account Admin2</p> <p>Account Admin3</p> <p><b>Ackerman Melville J</b></p> <p>Adelman Patti</p> <p>Admin Aps</p> | <p><b>Name</b> ▼</p> <p>ztestuser9003 testuser9003</p> <p>Zaza Frank L</p> <p>Zank Laura L</p> <p>Yates Ben</p> <p>Wright Micheal</p> <p>woody Kathy</p> |

**Filter** results by clicking on the magnifying glass tool  on the right to bring up the filter list. Use the letters for a quick Last Name filter.

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

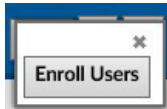
Displaying Active Last Name Search

Use the variable dropdown box to filter by the selected data type (e.g. Last Name, Cost Center, etc.), enter the keyword search in the Search free text box and click the **Search** button.

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

| Displaying                        | Active                   | Last Name                | Search                 |
|-----------------------------------|--------------------------|--------------------------|------------------------|
| Service Commission (CSC) Region-  | <input type="checkbox"/> | First Name               | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | User Full Name           | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | User Name                | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Email                    | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Employee ID              | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Department Name          | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Facility Name            | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Cost Center              | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Facility Code            | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Region                   | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Job code                 | Division               |
| Sheriff's Office---Law Enforcemen | <input type="checkbox"/> | Job Code Description     | Office-Law Enforcement |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Job Class                | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Job Class Description    | Division               |
| Sheriff's Office---Law Enforcemen | <input type="checkbox"/> | Job Position             | Office-Law Enforcement |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Job Position Description | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Employment Type          | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Specialty Type           | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Credential Type          | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | Sub Status               | Division               |
| Service Commission (CSC) Region-  | <input type="checkbox"/> | User ID                  | Division               |

**Enroll** team members from the User List by first checking the box to the left of the team member names of those you wish to enroll then clicking on the Action button **Actions** in the top right corner of the **User List**.



This will bring up the **Enroll Users** button. Click to launch the **Select Learning Object / Learning Object Instance List**.

Select Learning Object

Learning Object Instance List Add Learning Object | Exit | Previous | Next

| ID                       | Name  | Type                   | Status    | Start Datetime        | End Datetime           | Facility          | Instructor           |
|--------------------------|-------|------------------------|-----------|-----------------------|------------------------|-------------------|----------------------|
| <input type="checkbox"/> | 27410 | General Orientation    | Scheduled | 12/16/2016 9:00:00 AM | 12/16/2016 1:30:00 PM  | Innovation - C... | Sharon Penn Instr... |
| <input type="checkbox"/> | 27411 | General Orientation    | Scheduled | 12/23/2016 9:00:00 AM | 12/23/2016 1:30:00 PM  | Innovation - C... | Sharon Penn Instr... |
| <input type="checkbox"/> | 28926 | General Orientation    | Scheduled | 12/18/2016 9:00:00 AM | 12/18/2016 11:30:00 AM | Genesis E - Ce... | Administrator Med... |
| <input type="checkbox"/> | 28927 | General Orientation    | Scheduled | 12/22/2016 9:00:00 AM | 12/22/2016 11:30:00 AM | Genesis E - Ce... | Administrator Med... |
| <input type="checkbox"/> | 28928 | General Orientation    | Scheduled | 12/26/2016 9:00:00 AM | 12/26/2016 11:30:00 AM | Genesis E - Ce... | Administrator Med... |
| <input type="checkbox"/> | 28929 | General Orientation    | Scheduled | 12/29/2016 9:00:00 AM | 12/29/2016 11:30:00 AM | Genesis E - Ce... | Administrator Med... |
| <input type="checkbox"/> | 29072 | LMA-007 Course         | Scheduled | 5/7/2015 1:00:00 PM   | 5/7/2015 3:00:00 PM    | Genesis A - Ge... | Dheeraj Pesta        |
| <input type="checkbox"/> | 29073 | LMA-002 Learning Paths | Scheduled | 7/26/2016 8:00:00 AM  | 7/26/2016 9:00:00 AM   | Meeting Room...   | Sand Admin1          |
| <input type="checkbox"/> | 29074 | LMA-003 Course         | Scheduled | 5/8/2015 11:00:00 AM  | 5/8/2015 12:00:00 PM   | Health & Huma...  | Elizabeth Bloxham    |
| <input type="checkbox"/> | 29075 | LMA-010 Process Status | Scheduled | 5/20/2015 2:00:00 PM  | 5/20/2015 6:00:00 PM   | Meeting Room...   | Elizabeth Bloxham    |

Similarly, within this list use the sort and search features to find the desired learning objects.

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Displaying Classroom Learning Object Name

Select by clicking on the checkbox to the left of the row of those classes you wish to enroll the selected users in and click the **Add Learning Object** button to complete the enrollment.

**Add Learning Object**

The screen will refresh, the **Select Learning Object / Learning Object Instance List** will close and a confirmation message will appear in the top of the screen either confirming that selected users were enrolled in the selected courses or providing reasons why they were unable to be enrolled. [Overview – Session List View](#)

When selecting course related information from the **Overall Dashboard – Manager View Metrics** or the **Displaying** dropdown selector, the bottom section will show the **Session List**. This will show data related to user enrollment in specific course instances.

| Session List |  | Displaying: <span>Enrolled</span> |                     |                             | Previous | Next |
|--------------|--|-----------------------------------|---------------------|-----------------------------|----------|------|
| ID           | Actions  | Name                              | Employee ID         | Course                      | Due Date |      |
| 72           | Not Graded <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="radio"/> Move <input type="radio"/> Replace  | RTC Delmar                        |                     | Captivate Project No Test 4 |          |      |
| 111          | Passed <input type="radio"/> Failed <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="radio"/> Move <input type="radio"/> Replace                                 | TestUserXXX TestUserXXX           |                     | TestGoToMeeting             |          |      |
| 112          | Passed <input type="radio"/> Failed <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="radio"/> Move <input type="radio"/> Replace                                 | TestUserZZZ TestUserZZZ           |                     | TestGoToMeeting             |          |      |
| 113          | Passed <input type="radio"/> Failed <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="radio"/> Move <input type="radio"/> Replace                                 | TestUserYYY TestUserYYY           |                     | TestGoToMeeting             |          |      |
| 114          | Passed <input type="radio"/> Failed <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="radio"/> Checklist <input type="radio"/> Move <input type="radio"/> Replace | Gibbons William                   | wgibbons@sbcisd.org | State Compliance training   |          |      |
| 115          | Passed <input type="radio"/> Failed <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="radio"/> Checklist <input type="radio"/> Move <input type="radio"/> Replace | Rogers Kelly                      |                     | State Compliance training   |          |      |
| 116          | Passed <input type="radio"/> Failed <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="radio"/> Checklist <input type="radio"/> Move <input type="radio"/> Replace | Martinez Selena                   |                     | State Compliance training   |          |      |
| 117          | Passed <input type="radio"/> Failed <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="radio"/> Checklist <input type="radio"/> Move <input type="radio"/> Replace | Williams Bob                      |                     | State Compliance training   |          |      |

To view detailed session information, simply click on the Name or Course fields of the desired record.

### Learning Object Session

Roster Audit Trail Exit

---

**Student Info**

|                        |  |
|------------------------|--|
| Name: Williams Bob     | User ID: 164   |
| Phone:                 | Department: Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service C |
| Current Status: ENROLL | Email: jgittleman@learnsoft.com  |

---

**Authorizer Info**

|                  |        |
|------------------|--------|
| Authorizer Name: | Email: |
| Phone:           | Fax:   |

---

**Session Info**

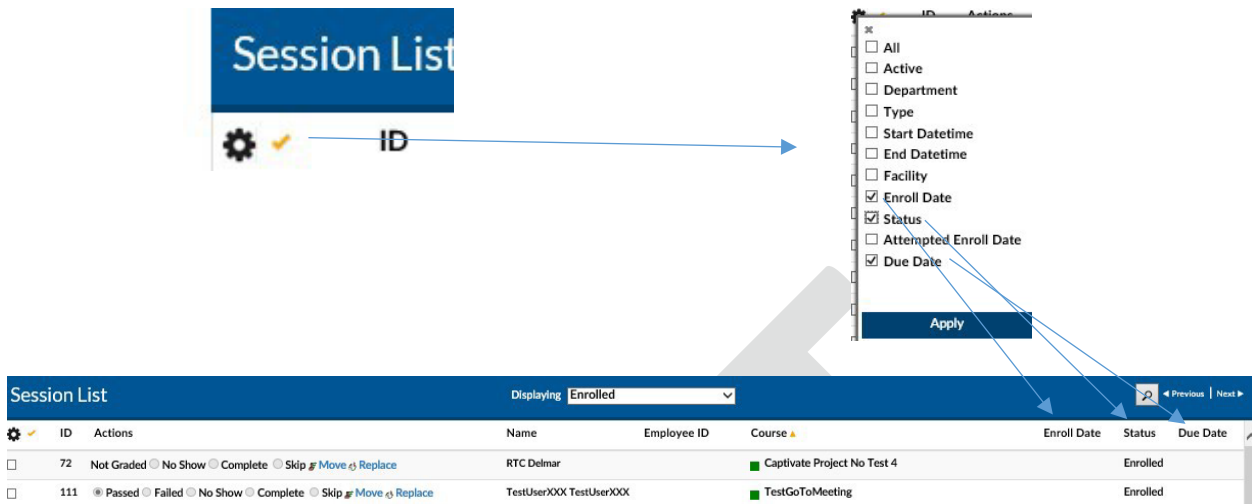
|  |  |
|--|--|
| Course Name: State Compliance training                                   | Start Date Time: 2/28/2017 9:00 AM PST |
| Description:   | End Date Time: 2/28/2017 11:00 AM PST  |
| Duration:  | Instructor(s):* Lglim Administrator    |
| Vendor:  | Direction:*                            |
| Location: Data Center - Command Center<br>ADDRESS : 2213 Executive Drive | Notes:*                                |
| 2/18/2017 11:13 AM (Enrolled, Administrator Lglim d)                     |  |

When in **Session List** Mode, you can also use the **Displaying** dropdown box to select the desired session information to be shown.

Enrolled: 75 %

- Pending
- Enrolled
- WaitList
- Complete
- Fail Complete
- No Show
- Class Session Complete
- Enrolled Classroom
- Enrolled Online
- Enrolled Assignments
- Enrolled Certifications
- Enrolled Resume Courses
- Displaying: **All Past Due Courses**
- Past Due Courses - 30 days
- Past Due Courses - 60 days
- Past Due Courses - 90 days
- Past Due Online
- Past Due Classroom
- Past Due Assignment
- Past Due Certification

The **Session List** data view is configurable. To add desired column data, click on the **gear** icon. This will bring up a checkbox of columns that can be displayed in this particular section. Check the desired data columns and click **Apply**. The screen will refresh with the additional columns displayed.




The screenshot shows the 'Session List' interface. A blue box labeled 'Session List' is at the top left. Below it is a gear icon and a checkmark icon. A blue arrow points from the 'ID' column header to a filter list on the right. The filter list has checkboxes for: All, Active, Department, Type, Start Datetime, End Datetime, Facility, Enroll Date, Status, Attempted Enroll Date, and Due Date. The 'Apply' button is at the bottom of the filter list. Below the filter list is a table with columns: ID, Name, Employee ID, Course, Enroll Date, Status, and Due Date. The table shows two rows of data.

| ID  | Name                    | Employee ID | Course                    | Enroll Date | Status   | Due Date |
|-----|-------------------------|-------------|---------------------------|-------------|----------|----------|
| 72  | RTC Delmar              |             | Captive Project No Test 4 |             | Enrolled |          |
| 111 | TestUserXXX TestUserXXX |             | TestGoToMeeting           |             | Enrolled |          |

**Sort** by Column, by clicking on Column name (or up / down triangle if available). A single click sorts in ascending order. A second click sorts in descending order.

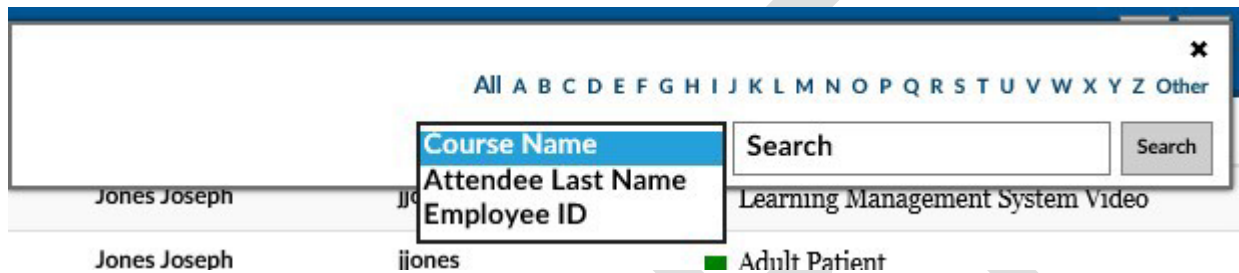
| Sort by <b>Course</b> Column in ascending order  | Sort by <b>Course</b> Column in descending order   |
|--|--|
| <p>Course ▲</p> <ul style="list-style-type: none"> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■ 2009 inservice Sept</li> <li>■ 2009 inservice Sept</li> <li>■ Access 2010 Introduction</li> <li>■ ACLS - Provider - 12 contact hours BRN</li> <li>■ Adult Patient</li> <li>■ Adult Patient</li> <li>■ Adult Patient</li> <li>■ Adult Patient</li> <li>■ AMN New Hire Webinar</li> </ul> | <p>Course ▼</p> <ul style="list-style-type: none"> <li>■ Weapons of Mass Destruction - Chemical</li> <li>■ Weapons of Mass Destruction - Chemical</li> <li>■ Weapons of Mass Destruction - Chemical</li> <li>■ Weapons of Mass Destruction - Chemical</li> <li>■ UPDATED 2016 FSRMC RN 9N Transitional Care Unit Annual Competency</li> <li>■ UPDATED 2016 FSRMC RN 9N Transitional Care Unit Annual Competency</li> <li>■ Tuberculin Skin Test</li> <li>■ Tuberculin Skin Test</li> <li>■ Tuberculin Skin Test</li> <li>■ Tuberculin Skin Test</li> <li>■ Tuberculin Skin Test</li> <li>■ Tuberculin Skin Test</li> </ul> |

**Filter** results by clicking on the magnifying glass tool  on the right to bring up the filter list.

Use the letters for a quick Course filter. Use the in search drop down to select the variable to filter by, enter the keyword search in the Search free text box and click search.



A screenshot of a search interface. At the top, there is a navigation bar with a close button (X) and a list of letters from A to Z, plus 'Other'. Below this is a search bar with a dropdown menu labeled 'Course Name' and a 'Search' button. The dropdown menu is open, showing options: 'Course Name', 'Attendee Last Name', and 'Employee ID'. Below the search bar, there is a table with columns for course name, status, and location. The first row shows 'Weapons of Mass Destruction - Chemical', 'True', and 'NJ---Kelemen Bldg---'.



A screenshot of a search interface. At the top, there is a navigation bar with a close button (X) and a list of letters from A to Z, plus 'Other'. Below this is a search bar with a dropdown menu labeled 'Attendee Last Name' and a 'Search' button. The dropdown menu is open, showing options: 'Course Name', 'Attendee Last Name', and 'Employee ID'. Below the search bar, there is a table with columns for name, last name, and status. The first row shows 'Jones Joseph', 'Jones', and 'Adult Patient'.

## Approve / Deny Permission to Enroll In a Course

Certain courses may require Manager Approval for their Team members to complete enrollment. These users are placed in a special “Pending” status until the Manager approves or denies their enrollment.

To see a list of your team members who are awaiting approval, first, click on the “**Course(s) Needing Approval**” button in the top section or selecting the “**Pending**” option from the bottom section **Displaying** dropdown selector.

### Progress Report

**Overall Dashboard**

64

Upcoming Courses  
1 Online  
24 Classroom

2

Courses Due  
2 Online Due  
0 Classroom Due

4 Course(s) Needing Approval

Pending Certifications  
0  
0 Due Soon / 0 Expired

Incomplete Evaluations  
6



Employee Listing  
25

Total Delinquent Users  
1,506

### Session List

Displaying **Pending**

| ID  | Actions                                     | Name            | Employee ID | Course   | Active |
|-----|---|-----------------|-------------|----------|--------|
| 161 | <a href="#">Enroll</a> <a href="#">Deny</a> | Smith Mario     | msmith      | CPR 2017 | True   |
| 162 | <a href="#">Enroll</a> <a href="#">Deny</a> | Smith Mary Anne | masmith     | CPR 2017 | True   |
| 163 | <a href="#">Enroll</a> <a href="#">Deny</a> | Smith Sarah     | ssmith      | CPR 2017 | True   |
| 164 | <a href="#">Enroll</a> <a href="#">Deny</a> | Smith Jane      | jsmith      | CPR 2017 | True   |

-  Click the Enroll text link to approve the enrollment.
-  Click the Deny text link to Deny the enrollment

## Team Tab

The **Team** tab provides the manager with access to **User List** information in full screen format. It also allows the manager to drill down into **Users**, **Enrollment** and **Competencies / Skills** (if enabled).

The default view is a listing of **Users** that make up your team as shown in the **User List**.

Overview Profile Search Analytics Team Reports

Users Enrollment Competencies/Skills

### User List

| User ID | Name                    |
|---------|-------------------------|
| 1368660 | Account Admin1          |
| 1368661 | Account Admin2          |
| 1368662 | Account Admin3          |
| 1367858 | Ackerman Melville J     |
| 1300940 | Adelman Patti           |
| 1368157 | Admin Aps               |
| 1268164 | admin ky                |
| 1367297 | Admin Cubic             |
| 1362788 | Admin BS                |
| 1368263 | Admin Gutherie          |
| 1368640 | Admin1 Sand             |
| 1368154 | admin1 test             |
| 998892  | admin2 mission          |
| 1368230 | Administrator Prohealth |
| 1337638 | Administrator Sandbox   |
| 1362787 | Admin BS                |


When hovering the mouse over the **Name** column, a rollover **User Overview** will display on the right side. This will update when changing from user to user.



User List

|                          | User ID | Name                    |
|--------------------------|---------|-------------------------|
| <input type="checkbox"/> | 1368660 | Account Admin1          |
| <input type="checkbox"/> | 1368661 | Account Admin2          |
| <input type="checkbox"/> | 1368662 | Account Admin3          |
| <input type="checkbox"/> | 1367058 | Ackerman Melville J     |
| <input type="checkbox"/> | 1300940 | Adelman Patti           |
| <input type="checkbox"/> | 1368157 | Admin Ape               |
| <input type="checkbox"/> | 1368164 | admin ky                |
| <input type="checkbox"/> | 1367397 | Admin Cubic             |
| <input type="checkbox"/> | 1362788 | Admin BS                |
| <input type="checkbox"/> | 1368263 | Admin Gutherie          |
| <input type="checkbox"/> | 1368640 | Admin1 Sand             |
| <input type="checkbox"/> | 1368154 | admin1 test             |
| <input type="checkbox"/> | 998892  | admin2 mission          |
| <input type="checkbox"/> | 1368230 | Administrator Prohealth |
| <input type="checkbox"/> | 1337638 | Administrator Sandbox   |

Overview



**Account Admin2**  
Early Intervention Program  
admin2  
dchopra@learnsoft.com

Hire Date: 3/31/2016

|                |   |
|----------------|---|
| Courses        | 5 |
| Assignments    | 0 |
| Certifications | 1 |
| Pass Due       | 0 |
| Completed      | 1 |
| Total Credits  | 4 |
| Total Units    | 2 |

Details Print Transcripts

Hover over a name and summary information for that team member will display.

Click **Details** or click on the Team member Name to bring up detailed profile info

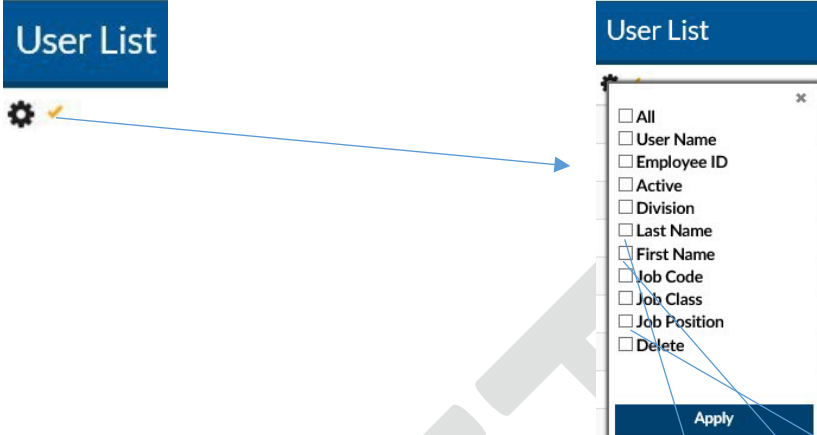
Click **Print Transcripts** to bring up a printable version of the User's Transcript

*Team – Navigation*

The **User List** data view is configurable. To add desired column data, click on the **gear** icon. This will bring up a checkbox of columns that can be displayed in this particular section. Check the desired data columns and click **Apply**. The screen will refresh with the additional columns displayed.

User List


User List



| User List                |         |                     |  |           |            |              | New | Previous | Next |
|--------------------------|---------|---------------------|--|-----------|------------|--------------|-----|----------|------|
|                          | User ID | Name                | Division   | Last Name | First Name | Job Position |     |          |      |
| <input type="checkbox"/> | 1368660 | Account Admin1      | NJ--3 MeduRx Plaza--Early Intervention Program A-3COOPER-00100784    | Account   | Admin1     |              |     |          |      |
| <input type="checkbox"/> | 1368661 | Account Admin2      | NJ--3 MeduRx Plaza--Early Intervention Program A-3COOPER-00100784    | Account   | Admin2     |              |     |          |      |
| <input type="checkbox"/> | 1368662 | Account Admin3      | NJ--3 MeduRx Plaza--Early Intervention Program A-3COOPER-00100784    | Account   | Admin3     |              |     |          |      |
| <input type="checkbox"/> | 1367858 | Ackerman Melville J | NJ--External--Community Physicians EXT-CP                            | Ackerman  | Melville   | CP Medicine  |     |          |      |
| <input type="checkbox"/> | 1300940 | Adelman Patti       | NJ--Kelemen Bldg--Post Anesthesia Care Unit A-KELEMEN-00100665       | Adelman   | Patti      | EAP COUN...  |     |          |      |
| <input type="checkbox"/> | 1368157 | Admin Aps           | NJ--Kelemen Bldg--Emergency Room Registration A-KELEMEN-00100906     | Admin     | Aps        |              |     |          |      |
| <input type="checkbox"/> | 1368164 | admin ky            | NJ--3 MeduRx Plaza--Med - Research 3 MeduRx Plaza A-3MeduRx-07586601 | admin     | ky         |              |     |          |      |
| <input type="checkbox"/> | 1367397 | Admin Cubic         | NJ--3 MeduRx Plaza--Behavioral Health Dept BHD-201                   | Admin     | Cubic      |              |     |          |      |
| <input type="checkbox"/> | 1362788 | Admin BS            | NJ--3 MeduRx Plaza--Behavioral Health Dept BHD-201                   | Admin     | BS         |              |     |          |      |
| <input type="checkbox"/> | 1368263 | Admin Gatherie      | NJ--3 MeduRx Plaza--Behavioral Health Dept BHD-201                   | Admin     | Gatherie   |              |     |          |      |
| <input type="checkbox"/> | 1368640 | Admin1 Sand         | NJ--Kelemen Bldg--Emergency Room Registration A-KELEMEN-00100906     | Admin1    | Sand       |              |     |          |      |
| <input type="checkbox"/> | 1368154 | admin1 test         | NJ--Kelemen Bldg--Emergency Room Registration A-KELEMEN-00100906     | admin1    | test       |              |     |          |      |

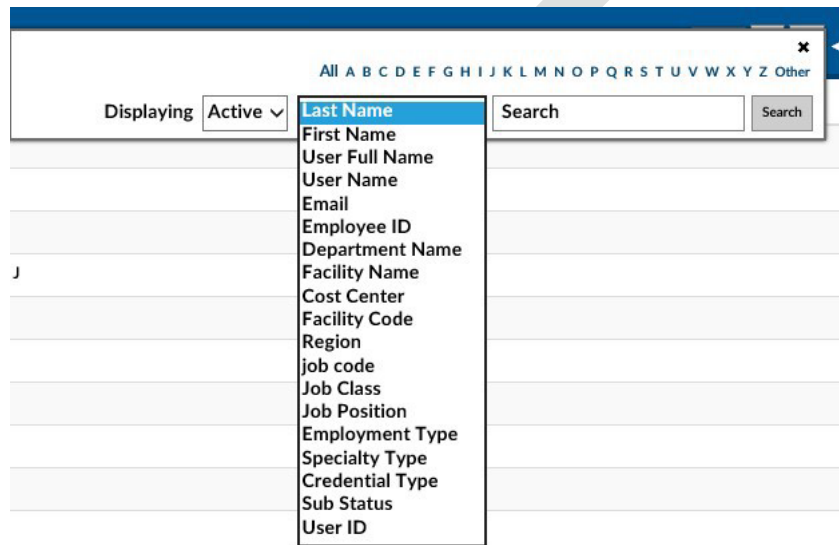
**Sort** by Column, by clicking on Column name (or up / down triangle if available). A single click sorts in ascending order. A second click sorts in descending order.


| Sort by <b>Name</b> Column in ascending order   | Sort by <b>Name</b> Column in descending order  |
|---|---|
| <div style="margin-bottom: 5px;">Name ▲</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Account Admin1</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Account Admin2</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Account Admin3</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; background-color: #f0f0f0;">Ackerman Melville J</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Adelman Patti</div> <div style="border: 1px solid #ccc; padding: 2px;">Admin Aps</div> | <div style="margin-bottom: 5px;">Name ▼</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">ztestuser9003 testuser9003</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Zaza Frank L</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Zank Laura L</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Yates Ben</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Wright Micheal</div> <div style="border: 1px solid #ccc; padding: 2px;">woody Kathy</div> |

**Filter** results by clicking on the magnifying glass tool  on the right to bring up the filter list.



Use the letters for a quick Last Name filter. Use the in search drop down to select the variable to filter by, enter the keyword search in the Search free text box and click search.



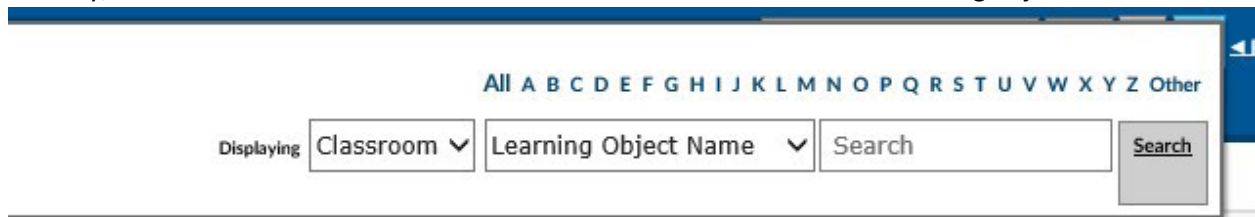
**Enroll** team members from the User List by first checking the box to the left of the team member names of those you wish to enroll then clicking on the Actions button  on the top right corner of

the User List to bring up the **Enroll Users** . Click to launch the **Select Learning Object / Learning Object Instance List**.

Select Learning Object

| Learning Object Instance List |       |                        |        |                |                       |                        |                   |                      |
|-------------------------------|-------|------------------------|--------|----------------|-----------------------|------------------------|-------------------|----------------------|
| ID                            | Name  | Type                   | Status | Start Datetime | End Datetime          | Facility               | Instructor        |                      |
| <input type="checkbox"/>      | 27410 | General Orientation    |        | Scheduled      | 12/16/2016 9:00:00 AM | 12/16/2016 1:30:00 PM  | Innovation - C... | Sharon Penn Instr... |
| <input type="checkbox"/>      | 27411 | General Orientation    |        | Scheduled      | 12/23/2016 9:00:00 AM | 12/23/2016 1:30:00 PM  | Innovation - C... | Sharon Penn Instr... |
| <input type="checkbox"/>      | 28926 | General Orientation    |        | Scheduled      | 12/18/2016 9:00:00 AM | 12/18/2016 11:30:00 AM | Genesis E - Ge... | Administrator Med... |
| <input type="checkbox"/>      | 28927 | General Orientation    |        | Scheduled      | 12/22/2016 9:00:00 AM | 12/22/2016 11:30:00 AM | Genesis E - Ge... | Administrator Med... |
| <input type="checkbox"/>      | 28928 | General Orientation    |        | Scheduled      | 12/26/2016 9:00:00 AM | 12/26/2016 11:30:00 AM | Genesis E - Ge... | Administrator Med... |
| <input type="checkbox"/>      | 28929 | General Orientation    |        | Scheduled      | 12/29/2016 9:00:00 AM | 12/29/2016 11:30:00 AM | Genesis E - Ge... | Administrator Med... |
| <input type="checkbox"/>      | 29072 | LMA 007 Course         |        | Scheduled      | 5/7/2015 1:00:00 PM   | 5/7/2015 3:00:00 PM    | Genesis A - Ge... | Dheeraj Petla        |
| <input type="checkbox"/>      | 29073 | LMA-002 Learning Paths |        | Scheduled      | 7/26/2016 8:00:00 AM  | 7/26/2016 9:00:00 AM   | Meeting Room...   | Sand Admin1          |
| <input type="checkbox"/>      | 29074 | LMA-003 Course         |        | Scheduled      | 5/8/2015 11:00:00 AM  | 5/8/2015 12:00:00 PM   | Health & Huma...  | Elizabeth Bloxham    |
| <input type="checkbox"/>      | 29075 | LMA-010 Process Status |        | Scheduled      | 5/20/2015 2:00:00 PM  | 5/20/2015 4:00:00 PM   | Meeting Room...   | Elizabeth Bloxham    |

Similarly, within this list use the sort and search features to find the desired learning objects.



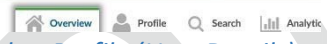
Select by clicking on the checkbox to the left of the row of those classes you wish to enroll the selected users in and click the **Add Learning Object** button to complete the enrollment.

**Add Learning Object**

The screen will refresh, the **Select Learning Object / Learning Object Instance List** will close and the a confirmation message will appear in the top of the screen either confirming that selected users were enrolled in the selected courses or providing reasons why they were unable to be enrolled.

```

testuser101 testuser101 has been successfully enrolled. (2017 1B/LDRP SKILLS BLITZ)
testuser102 testuser102 has been successfully enrolled. (2017 1B/LDRP SKILLS BLITZ)
testuser101 testuser101, Enrollment Error : There is the date conflict between the sessio
testuser102 testuser102 has been successfully enrolled. (ACLS Course 1)
  
```



### Team Tab – Team Member Profile (User Details)

Clicking on the **Name** of a team member in the **User List** or clicking on the **Details** link from the team member’s **Overview**, will bring up the team member’s **Profile** info (aka **USER DETAILS**). Different section tabs at top allow you to quickly access the team member information relevant to your search. Simply click to access that information.



### Team Tab – Team Member Profile – Overview Tab

By default the **Overview** tab displaying basic HR and User Information will display.

USER DETAILS : ADMIN3 ACCOUNT - LEARNSOFT ID - 1368662 PRINT TRANSCRIPT EDIT AUDIT TRAIL EXIT

Overview Groups Enrollments Assignments Certifications Evaluations Competency Succession Development Details

**Personal Information**

|              |              |                 |                          |
|--------------|--------------|-----------------|--------------------------|
| User Name:   | admin3       | Email:          | dchopra@learnsoft.com    |
| First Name:  | Admin3       | Work Phone:     |                          |
| Middle Name: |              | City:           |                          |
| Last Name:   | Account      | State:          |                          |
| Birth Date:  |              | Zip:            |                          |
| Gender:      |              | Country:        | United States Of America |
| Language:    | English (US) | Change Password | <input type="checkbox"/> |

**Employee Information**

|                   |                            |                              |           |
|-------------------|----------------------------|------------------------------|-----------|
| Employee ID:      | admin3                     | Hire Date:                   | 3/31/2016 |
| Badge ID:         |                            | Promotion Date:              |           |
| Employment Type:  | Employee                   | Termination Date:            |           |
| Position:         |                            | Rehired Date:                |           |
| Division:         | Early Intervention Program | Salary Grade:                |           |
| Supervisor Level: |                            | Leadership Assessment Level: |           |
| Specialty Type:   |                            | School:                      |           |
| Credential Type:  |                            | CDL Classification:          |           |
| Sub Status:       |                            | CDL Expiration Date:         |           |
|                   |                            | Safety Sensitive:            |           |

### Team Tab – Team Member Profile – Buttons

Buttons in the upper right hand corner, will allow you to perform the following functions:

| PRINT TRANSCRIPT  | EDIT   | AUDIT TRAIL   | EXIT   |
|---|--|---|--|
| Provides a transcript report in a separate window. This can be printed. | Allows you to edit / fill-in information (where allowed) | Provides a listing of changes made to the profile and lists those making the changes. | Exits the profile and returns to the Team tab. |

### Team Tab – Team Member Profile – Groups Tab

The Profile - **Groups** tab provides a listing of the LMS-specific groups which a team member is or has been a member. It also indicates which **Division** to which the role is associated. The **Active** column indicates if the association is still active and the **Primary Position** column will indicate which is their primary role

USER DETAILS : ADMIN3 ACCOUNT - LEARNSOFT ID - 1368662 PRINT TRANSCRIPT EDIT AUDIT TRAIL EXIT

Overview **Groups** Enrollments Assignments Certifications Evaluations Competency Succession Development Details

**Available Groups**

| Group Name                | Primary Division | Division   | Primary JobPosition | Position | Recursive | Active |
|---------------------------|------------------|--|---------------------|----------|-----------|--------|
| Standard User             | Yes              | NI--3 Medu/Rk Plaza--Early Intervention Program A-3COOPER-00100794 | Yes                 |          |           | Yes    |
| Administrator             | No               | Learning Center  | No                  |          | Yes       | Yes    |
| Client SuperAdministrator | No               | Learning Center  | No                  |          | Yes       | Yes    |
| Manager                   | No               | Learning Center  | No                  |          | Yes       | Yes    |
| Instructor                | No               | Learning Center  | No                  |          | Yes       | Yes    |



### Team Tab – Team Member Profile – Enrollments Tab

The Profile - **Enrollments** tab provides a listing of all the courses which the team member has been enrolled in. It allows the Manager to search user learning records to ensure they have completed required courses. The columns list the **Learning Object** (course name), Enrollment **Status**, **Completion Date** (if completed), course **Type**, shows how the user was enrolled (**Assignment**) and provides any course **Attachments**. For classes that the Manager enrolled the user, which have not been completed, there is an **Action** column, which allows the Manager to **Cancel** the enrollment.

USER DETAILS : ADMIN3 ACCOUNT - LEARNSOFT ID - 1368662

PRINT TRANSCRIPT EDIT AUDIT TRAIL EXIT

Overview Groups **Enrollments** Assignments Certifications Evaluations Competency Succession Development Details

Available Learning Object Sessions New Learning Object Session

| Learning Object                      | Status                           | Complete Date | Type                         | Start Date         | Score | Assignment                                    | Attachment | Actions  |
|--------------------------------------|----------------------------------|---------------|------------------------------|--------------------|-------|---|------------|--|
| cultural competency newbuild module2 | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                            |            | <input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel |
| General Orientation                  | Completed                        | 3/31/2016     | Classroom Instruction Course | 3/31/2016 1:15 PM  |       | Enrolled (Manager)                            |            |  |
| Centerline Walklist Demo Course      | Cancelled By Admin (Admin1 Sand) |               | Classroom Instruction Course | 7/21/2016 7:00 AM  |       |   |            |  |
| Harvard MM - Managing Upward         | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                            |            | <input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel |
| Ebola Advanced Training              | Enrolled                         |               | Classroom Instruction Course | 7/28/2016 10:00 AM |       | Enrolled (Required By Manager, Due 9/12/2016) |            |  |

[Show More Learning Object Sessions](#)

A subset of course is shown by default. Click the *Show More Learning Object Sessions* link to expand the page and show all the Learning Object Sessions.

USER DETAILS : ACCOUNT ADMIN3 - LEARNSOFT ID - 1368662

PRINT TRANSCRIPT EDIT AUDIT TRAIL EXIT

Overview Groups **Enrollments** Assignments Certifications Evaluations Competency Succession Development Details

Available Learning Object Sessions

| Learning Object                      | Status                           | Complete Date | Type                         | Start Date         | Score | Assignment                                    | Attachment | Actions  |
|--------------------------------------|----------------------------------|---------------|------------------------------|--------------------|-------|---|------------|--|
| cultural competency newbuild module2 | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                            |            | <input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel |
| General Orientation                  | Completed                        | 3/31/2016     | Classroom Instruction Course | 3/31/2016 1:15 PM  |       | Enrolled (Manager)                            |            |  |
| Centerline Walklist Demo Course      | Cancelled By Admin (Admin1 Sand) |               | Classroom Instruction Course | 7/21/2016 7:00 AM  |       |   |            |  |
| Harvard MM - Managing Upward         | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                            |            | <input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel |
| Ebola Advanced Training              | Enrolled                         |               | Classroom Instruction Course | 7/28/2016 10:00 AM |       | Enrolled (Required By Manager, Due 9/12/2016) |            |  |
| General Orientation                  | Enrolled                         |               | Classroom Instruction Course | 11/13/2016 8:00 AM |       | Enrolled (Manager)                            |            |  |
| Test - MG                            | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                            |            | <input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel |
| CRE Exam B                           | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                            |            | <input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel |
| Captive Project No Test 4            | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                            |            | <input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel |
| Z Test Course                        | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                            |            | <input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel |
| Course for Instructor Evaluation     | Enrolled                         |               | Classroom Instruction Course | 9/27/2016 8:30 AM  |       | Enrolled (Manager)                            |            | <input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel |

[Show Short List of Learning Object Sessions](#)

**Sort** by clicking on the blue, sortable column headings. A single click sorts in ascending order; a second



click sorts in descending order.

USER DETAILS : ACCOUNT ADMIN3 - LEARNSOFT ID - 1368662

PRINT TRANSCRIPT EDIT AUDIT TRAIL EXIT

Overview Groups **Enrollments** Assignments Certifications Evaluations Competency Succession Development Details

Available Learning Object Sessions

| Learning Object                      | Status                           | Complete Date | Type                         | Start Date         | Score | Assignment                                   | Attachment | Actions   |
|--------------------------------------|----------------------------------|---------------|------------------------------|--------------------|-------|--|------------|---|
| Centerline Walklist Demo Course      | Cancelled By Admin (Admin1 Sand) |               | Classroom Instruction Course | 3/23/2016 7:00 AM  |       |  |            |   |
| General Orientation                  | Completed                        | 3/31/2016     | Classroom Instruction Course | 3/31/2016 1:15 PM  |       | Enrolled (Manager)                           |            |   |
| cultural competency newbuild module2 | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                           |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Harvard MM - Managing Upward         | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                           |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Ebola Advanced Training              | Enrolled                         |               | Classroom Instruction Course | 3/28/2016 10:00 AM |       | Enrolled (Required By Manager Due 9/12/2016) |            |   |
| General Orientation                  | Enrolled                         |               | Classroom Instruction Course | 11/13/2016 8:00 AM |       | Enrolled (Manager)                           |            |   |
| Test - MG                            | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                           |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| CRE Exam B                           | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                           |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Captive Project No Test 4            | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                           |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Z Test Course                        | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)                           |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Course for Instructor Evaluation     | Enrolled                         |               | Classroom Instruction Course | 8/7/2016 8:30 AM   |       | Enrolled (Manager)                           |            | #(1)  |

Show Short List of Learning Object Sessions

**Cancel** any not completed courses which you, as the Manager, enrolled the user by clicking the **XCancel** text link and pressing **OK** in the confirmation popup.

USER DETAILS : ACCOUNT ADMIN3 - LEARNSOFT ID - 1368662

PRINT TRANSCRIPT EDIT AUDIT TRAIL EXIT

Overview Groups **Enrollments** Assignments Certifications Evaluations Competency Succession Development Details

Available Learning Object Sessions

| Learning Object                      | Status                           | Complete Date | Type                         | Start Date         | Score | Assignment                     | Attachment | Actions   |
|--------------------------------------|----------------------------------|---------------|------------------------------|--------------------|-------|--------------------------------|------------|---|
| Centerline Walklist Demo Course      | Cancelled By Admin (Admin1 Sand) |               | Classroom Instruction Course | 3/21/2016 7:00 AM  |       |                                |            |   |
| General Orientation                  | Completed                        | 3/31/2016     | Classroom Instruction Course | 3/31/2016 1:15 PM  |       | Enrolled (Manager)             |            |   |
| cultural competency newbuild module2 | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)             |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Harvard MM - Managing Upward         | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)             |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Ebola Advanced Training              | Enrolled                         |               | Classroom Instruction Course | 3/28/2016          |       | Enrolled (Required By Manager) |            |   |
| General Orientation                  | Enrolled                         |               | Classroom Instruction Course | 11/13/2016 8:00 AM |       | Enrolled (Manager)             |            |   |
| Test - MG                            | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)             |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| CRE Exam B                           | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)             |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Captive Project No Test 4            | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)             |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Z Test Course                        | Enrolled                         |               | On-Line Training Course      |                    |       | Enrolled (Manager)             |            | <input type="checkbox"/> Select <b>X</b> Cancel |
| Course for Instructor Evaluation     | Enrolled                         |               | Classroom Instruction Course | 8/7/2016 8:30 AM   |       | Enrolled (Manager)             |            | #(1)  |

Message from webpage

Are you sure, you want to cancel this learning object session?

OK Cancel

Show Short List of Learning Object Sessions

## Team Tab – Team Member Profile – Assignments Tab

Click the Profile - **Assignments** tab to see a listing of all the team member's assignments, the associated courses (**Learning Object**), their **due dates** and completion **Status** and **Date Completed** (if completed). Expand and sort as outlined in the Enrollments section.

Overview Groups Enrollments **Assignments** Certifications Evaluations Competency Succession Development Details

Available Assignment Sessions

| Name                          | Learning Object                     | Status    | Date Completed | Due Date  | Complete |
|-------------------------------|-------------------------------------|-----------|----------------|-----------|----------|
| Annual Mandatory Assignment 1 | Annual Mandatory Education Course 1 | Completed | 1/31/2016      | 1/31/2016 | Yes      |
| Annual Mandatory Assignment 2 | Annual Mandatory Education Course 2 | Enrolled  |                | 3/31/2016 | No       |





Team Tab – Team Member Profile – Certifications Tab

Click the Profile - **Certifications** tab to see a listing of all the team member’s Certifications. Note, these are LMS-based certifications, which may differ from external certifications or licenses (If the latter info is passed from the HRIS system, it can be seen in the Current Licenses subsection of the Details tab, below). The **Certification Name**, associated courses (**Learning Object**), completion **Status** and **Expiration (on)** Date are shown in column format. Expand and sort as outlined in the Enrollments section.

| Overview                        | Groups          | Enrollments  | Assignments  | Certifications  | Evaluations | Competency | Succession | Development | Details |
|---------------------------------|-----------------|--------------|--------------|-----------------|-------------|------------|------------|-------------|---------|
| <b>Available Certifications</b> |                 |              |              |                 |             |            |            |             |         |
| Certification Name              | Require Credits | Credit Hours | Credit Units | Learning Object | Expires     | Expires On | Complete   |             |         |
| Highway Driving                 | No              |              |              | Highway Driving | Yes         | 7/21/2017  | Yes        |             |         |

Team Tab – Team Member Profile – Evaluations, Competency, Successions & Development Tabs

The Profile - **Evaluations, Competency, Succession** and **Development** Tabs refer to information that is part of the Talent Management Suite (TMS), a separate set of modules that integrate with the LMS. If your organization has purchased TMS modules, please see associated documentation for these sections.

Team Tab – Team Member Profile – Details Tab

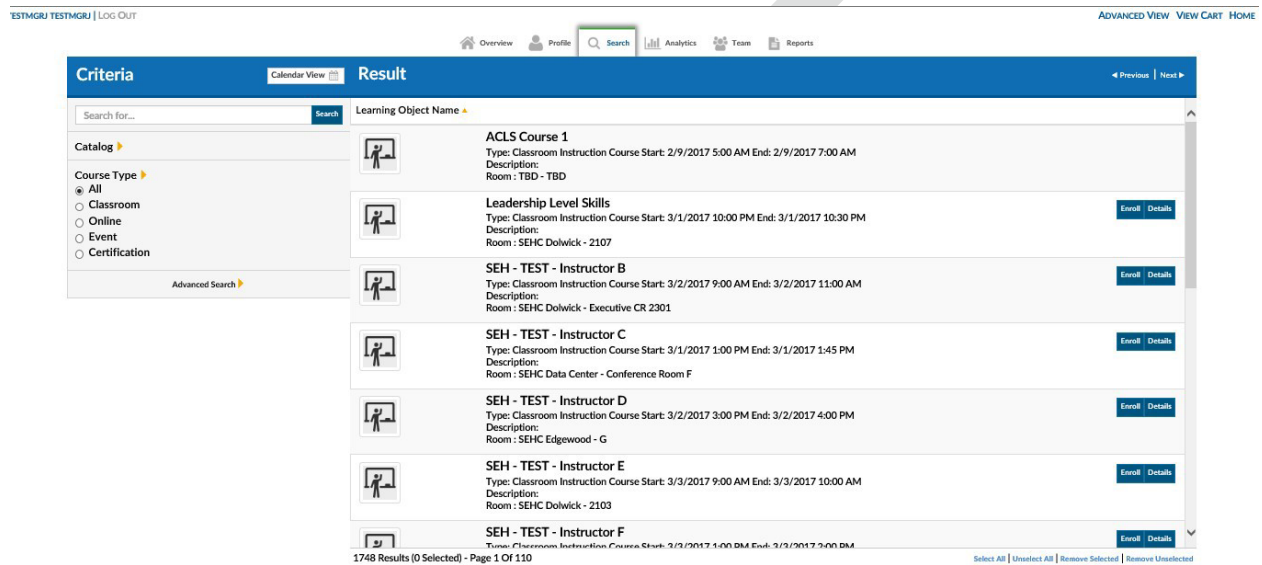
The Profile - **Details** tab provides a single page, scrollable version of all the other tabs. Simply scroll up or down to access the desired section.

| Overview                                  | Groups                      | Enrollments   | Assignments  | Certifications              | Evaluations        | Competency               | Succession         | Development | Details |
|---|-----------------------------|---|--------------|-----------------------------|--------------------|--------------------------|--------------------|-------------|---------|
| <b>Personal Information</b>               |                             |   |              |                             |                    |                          |                    |             |         |
| First Name*                               | ipalshin                    |   |              | Email                       |                    | ip@learnsoft.com         |                    |             |         |
| Last Name*                                | Am                          |   |              | Work Phone                  |                    |                          |                    |             |         |
| Middle Name*                              |                             |   |              | City                        |                    |                          |                    |             |         |
| Last Name*                                | Admin                       |   |              | State                       |                    |                          |                    |             |         |
| Birth Date*                               |                             |   |              | Zip                         |                    |                          |                    |             |         |
| Gender*                                   |                             |   |              | Country                     |                    | United States Of America |                    |             |         |
| Language*                                 | English (US)                |   |              | Change Password             |                    | <input type="checkbox"/> |                    |             |         |
| <b>Employee Information</b>               |                             |   |              |                             |                    |                          |                    |             |         |
| Employee ID*                              |                             |   |              | Hire Date*                  |                    | 9/3/2014                 |                    |             |         |
| Badge ID*                                 |                             |   |              | Probation Start             |                    |                          |                    |             |         |
| Employment Type*                          | Employee                    |   |              | Termination Date            |                    |                          |                    |             |         |
| Position*                                 |                             |   |              | Retired Date                |                    |                          |                    |             |         |
| Division*                                 | Emergency Room Registration |   |              | Salary Grade                |                    |                          |                    |             |         |
| Supervisor Level*                         |                             |   |              | Leadership Assessment Level |                    |                          |                    |             |         |
| Specialty Type*                           |                             |   |              | School                      |                    |                          |                    |             |         |
| Credential Type*                          |                             |   |              | CPI Classification          |                    |                          |                    |             |         |
| Sub Status*                               |                             |   |              | CPI Expiration Date         |                    |                          |                    |             |         |
| <b>Available Groups</b>                   |                             |   |              |                             |                    |                          |                    |             |         |
| Group                                     | Phone Tracker               | Group   |              | Phone Tracker               | Phone              | Success                  | Active             |             |         |
| Initial User                              | Yes                         | NI - Retail Reg - Emergency Room Registration A 981446-000006 |              | Phone Tracker               | Phone              | Success                  | Active             |             |         |
| Initial User                              | No                          | Learning Center -NI   |              | Phone Tracker               | Phone              | Success                  | Active             |             |         |
| Initial User                              | No                          | Learning Center -NI   |              | Phone Tracker               | Phone              | Success                  | Active             |             |         |
| <b>Direct Supervisors</b>                 |                             |   |              |                             |                    |                          |                    |             |         |
| <b>Current Licenses</b>                   |                             |   |              |                             |                    |                          |                    |             |         |
| <b>Default Custom User Role</b>           |                             |   |              |                             |                    |                          |                    |             |         |
| <b>Available Certifications</b>           |                             |   |              |                             |                    |                          |                    |             |         |
| Certification Name                        | Require Credits             | Credit Hours  | Credit Units | Learning Object             | Expires            | Expires On               | Complete           |             |         |
| Highway Driving                           | No                          |   |              | Highway Driving             | Yes                | 7/21/2017                | Yes                |             |         |
| <b>Available Learning Object Sessions</b> |                             |   |              |                             |                    |                          |                    |             |         |
| Learning Object Name                      | Date                        | Complete Date   | Start Date   | End Date                    | Assignment         | Retention                | Action             |             |         |
| Highway Driving Training                  | Completed                   | 8/21/2014   | Completed    | 9/3/2014                    | Enrolled (Manager) | Enrolled (Manager)       | Enrolled (Manager) |             |         |

## Search Tab

Clicking the Search tab will yield an easy to use yet powerful search feature that in a single page combines multiple search methodologies including keyword, predictive, advanced, calendar and catalog

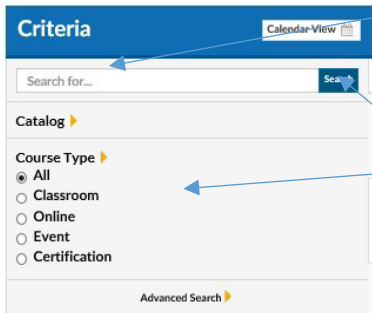
When first accessing, the right side Result List will auto populate with a listing of all classes which you have permission to enroll yourself and your team members



The screenshot shows the Learnsoft Search Results page. At the top, there is a navigation bar with 'Overview', 'Profile', 'Search', 'Analytics', 'Team', and 'Reports'. The 'Search' tab is active. Below the navigation bar, there is a 'Criteria' section on the left and a 'Result' section on the right. The 'Criteria' section includes a search bar, a 'Catalog' dropdown, and a 'Course Type' dropdown with options: All (selected), Classroom, Online, Event, and Certification. The 'Result' section displays a list of courses with columns for 'Learning Object Name', 'Type', 'Start/End Times', 'Description', and 'Room'. Each course entry has an 'Enroll' button and a 'Details' link. The courses listed are: ACLS Course 1, Leadership Level Skills, SEH - TEST - Instructor B, SEH - TEST - Instructor C, SEH - TEST - Instructor D, SEH - TEST - Instructor E, and SEH - TEST - Instructor F. At the bottom of the results, it says '1748 Results (0 Selected) - Page 1 Of 110'. There are also links for 'Select All', 'Unselect All', 'Remove Selected', and 'Remove Unselected'.

| Learning Object Name      | Type                         | Start/End Times                          | Description  | Room  | Enroll | Details |
|---------------------------|------------------------------|--|--------------|---|--------|---------|
| ACLS Course 1             | Classroom Instruction Course | 2/9/2017 5:00 AM End: 2/9/2017 7:00 AM   | Description: | Room : TBD - TBD                            |        |         |
| Leadership Level Skills   | Classroom Instruction Course | 3/1/2017 10:00 PM End: 3/1/2017 10:30 PM | Description: | Room : SEHC Dolwick - 2107                  | Enroll | Details |
| SEH - TEST - Instructor B | Classroom Instruction Course | 3/2/2017 9:00 AM End: 3/2/2017 11:00 AM  | Description: | Room : SEHC Dolwick - Executive CR 2301     | Enroll | Details |
| SEH - TEST - Instructor C | Classroom Instruction Course | 3/1/2017 1:00 PM End: 3/1/2017 1:45 PM   | Description: | Room : SEHC Data Center - Conference Room F | Enroll | Details |
| SEH - TEST - Instructor D | Classroom Instruction Course | 3/2/2017 3:00 PM End: 3/2/2017 4:00 PM   | Description: | Room : SEHC Edgewood - G                    | Enroll | Details |
| SEH - TEST - Instructor E | Classroom Instruction Course | 3/3/2017 9:00 AM End: 3/3/2017 10:00 AM  | Description: | Room : SEHC Dolwick - 2103                  | Enroll | Details |
| SEH - TEST - Instructor F | Classroom Instruction Course | 3/3/2017 1:00 PM End: 3/3/2017 2:00 PM   | Description: | Room : SEHC Dolwick - 2103                  | Enroll | Details |

## Search – Predictive and Keyword search



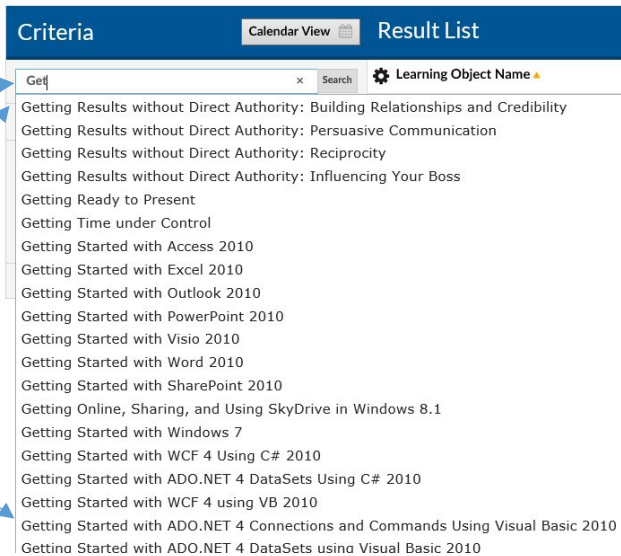
Free Text Field allows you to enter keywords

Select Course Type to narrow results.

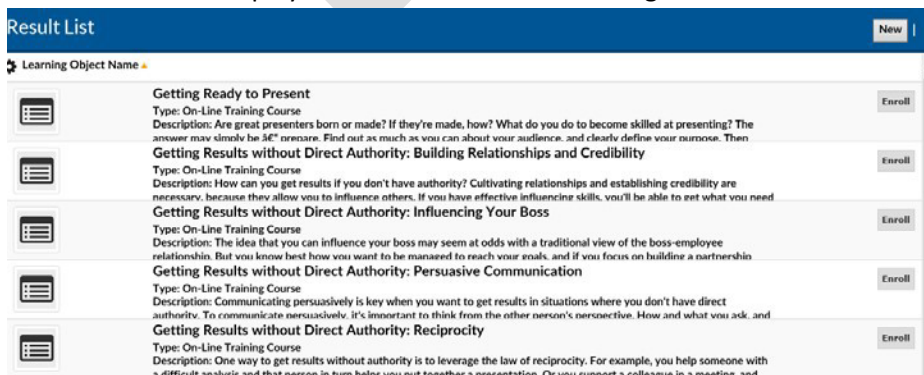
Click the Search button when ready to search

Start entering keywords

Google like “Predictive Search” offers suggestions based on actual course names. Click on any of the suggestions to search (no need to click the Search button).



Search results are displayed in the **Result List** on the right side.



## Search – Advanced search

**Criteria**

**Catalog** ▶

**Course Type** ▶
 

- All
- Classroom
- Online
- Event
- Certification

Advanced Search

**Instructor** ▶  
 Blank Lisa K.  
 Davis Michelle Sue  
 Delaney Sandra  
 Durst Steve F

**Date Range** ▶
 

- Any Date
- Specific Date

**Start Date**

**End Date**

**Facility** ▶  
 - Select One -

**Training Vendor** ▶  
 - Select One -

**Room** ▶  
 - Select One -

**Topic** ▶  
 - Select One -

**CE Hours** ▶  
 - Select One -

**Accreditation** ▶  
 - Select One -

**Job Position** ▶  
 - Select One -


Click Advanced Search Arrow to open Advanced Search Menu allowing refined course lookup.

Narrow to a date Range by selecting Specific Date, then entering a Start Date and End Date.

Use dropdown Selectors to choose from a list of prepopulated options.

## Search – Detailed Info & (Manager) Enroll Team

To see detailed information, click the **Details** button to the right of the row of the desired course.

|   |  |  |
|---|--|--|
|  | <small>Room : Innovation - Central - Magnet Central</small><br><b>2016 FSRMC RN 9N Transitional Care Unit Annual Competency</b><br><small>Type: Classroom Instruction Course Start: 9/1/2016 9:00 AM End: 9/1/2016 5:00 PM</small><br><small>Description: 9N Unit specific competencies</small><br><small>Room : School of Nursing Classroom - School of Nursing Classroom</small> | <a href="#">Enroll</a> <a href="#">Details</a> |
|---|--|--|

This will bring up the Course Info Page which provides detailed information which may include Course Name, Description, Start and End Dates, Authorizer, Payment and Instructor Information, Location, Directions and even a Course Outline.

Click the **Enroll** button to enroll yourself into this class.

Room : Innovation - Central - Maenet Central  
 2016 FSRMC RN 9N Transitional Care Unit Annual Competency  
 Type: Classroom Instruction Course Start: 9/1/2016 9:00 AM End: 9/1/2016 5:00 PM  
 Description: 9N Unit specific competencies  
 Room : School of Nursing Classroom - School of Nursing Classroom

**LEARNING OBJECT INSTANCE** ENROLL

Please click Enroll button for enrolling in this learning activity.

**COURSE INFO**  
 Description: [Text Area]

**Search Attendees**


**USER LOOKUP.**  
 Please select users by checking the checkbox and clicking "Add" button.  
 Last Name: [ ] First Name: [ ] Middle Name: [ ] Employee ID: [ ]

**User List** Add Attendees [ ] Previous Next

| <input type="checkbox"/> | User ID | Name                |
|--------------------------|---------|---------------------|
| <input type="checkbox"/> | 1368660 | Account Admin1      |
| <input type="checkbox"/> | 1368661 | Account Admin2      |
| <input type="checkbox"/> | 1368662 | Account Admin3      |
| <input type="checkbox"/> | 1367858 | Ackerman Melville J |
| <input type="checkbox"/> | 1300940 | Adelman Patti       |
| <input type="checkbox"/> | 1368157 | Admin Aps           |
| <input type="checkbox"/> | 1368164 | admin ky            |
| <input type="checkbox"/> | 1367397 | Admin Cubic         |
| <input type="checkbox"/> | 1362788 | Admin BS            |
| <input type="checkbox"/> | 1368263 | Admin Gutherie      |

required, select an Authorizer from this list.

To Enroll your Team Members, click the **Enroll** button to the right of the row of the desired course.

Managers can also add a Deadline for the selected enrollments clicking the list icon  and adding a **Due Date** (Note: The additional comments field may be enabled in a future release). This action must be taken before clicking the Add Attendees button.


Due Date |  Comments

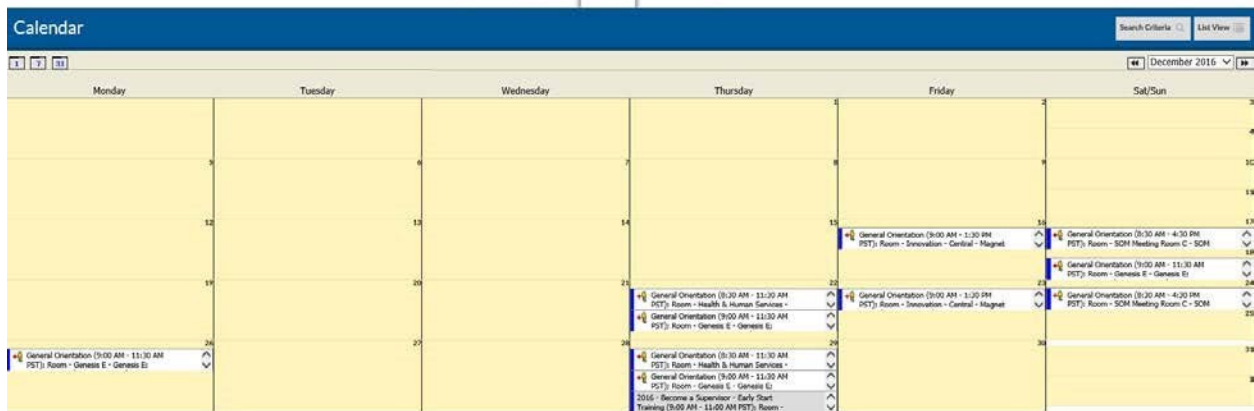
| S  | M  | T  | W  | T  | F  | S  |
|----|----|----|----|----|----|----|
| 27 | 28 | 29 | 30 | 1  | 2  | 3  |
| 4  | 5  | 6  | 7  | 8  | 9  | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |

Today Close


Search – Calendar Lookup & (Manager) Enroll Team



Click the  button to view upcoming classroom-based classes in a calendar format.

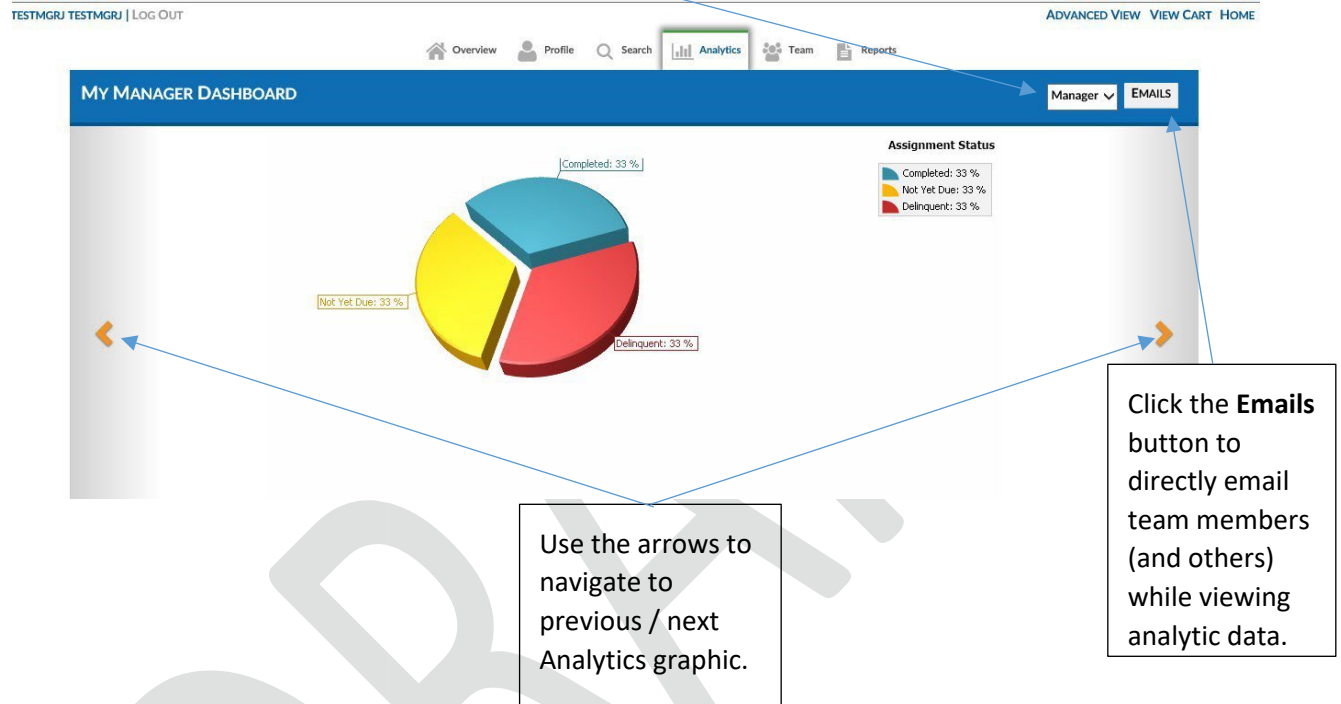


The screenshot shows a calendar interface with a blue header bar containing 'Calendar', 'Search Criteria', and 'List View'. Below the header, there are navigation icons and a date selector set to 'December 2016'. The main area is a grid with columns for days of the week (Monday to Saturday) and rows for dates. Several class instances are listed, including 'General Orientation' and '2016 - Become a Supervisor - Early Start Training'. Each class entry includes details like time, room, and instructor.

Click the  Enroll Users icon on the left side of the desired scheduled class to launch the Add Users Screen. Follow steps from prior sections to look up and Add Attendees to the specific scheduled course instance.

## Analytics Tab

The **Analytics** tab provides a graphical way to view learning metrics. They simplify often complex or large data analysis. The graphics for each organization will differ. Upon accessing the tab you will be presented with Analytics graphics that pertain to you as a User. To access the **Manager Analytics**, click on the **Group** dropdown box and select **Manager**.



TESTMGRJ TESTMGRJ | LOG OUT ADVANCED VIEW VIEW CART HOME

Overview Profile Search **Analytics** Team Reports

MY MANAGER DASHBOARD Manager ▼ EMAILS

**Assignment Status**

- Completed: 33 %
- Not Yet Due: 33 %
- Delinquent: 33 %

Use the arrows to navigate to previous / next Analytics graphic.

Click the **Emails** button to directly email team members (and others) while viewing analytic data.



Some analytic graphs contain associated report information. Click the Report icon (if available) to bring up associated reports and drill down to specific department or Team member data. [Reports Tab](#)


Click the **Reports** tab to access the **Report List** which displays a listing of reports enabled for use by the **Manager** and allowing the Manager to query learning information required to successfully manage, ensure compliance and provide report data about their team. *Note: Though Managers may share the same reporting capability, the LMS only allows them to see the data associated with their departments and teams.*



| Report List              |          |                                     |   |      |        |
|--------------------------|----------|-------------------------------------|---|------|--------|
| <input type="checkbox"/> | Type     | Name                                | Description   | View | Delete |
| <input type="checkbox"/> | Standard | Certificate of Completion - SEH     |   |      |        |
| <input type="checkbox"/> | Standard | Certificate of Completion - SEH - 1 |   |      |        |
| <input type="checkbox"/> | Standard | Certificate of Completion - SEP     |   |      |        |
| <input type="checkbox"/> | Standard | Class Roster                        | Class Roster  |      |        |
| <input type="checkbox"/> | Standard | Crucial Conversation                |   |      |        |
| <input type="checkbox"/> | Standard | Employee Completion Report          | Employee Completion Report                                      |      |        |
| <input type="checkbox"/> | Standard | Group Employee Transcript           | Group Employee Transcript                                       |      |        |
| <input type="checkbox"/> | Standard | Instructor Schedule                 | Instructor Schedule Report                                      |      |        |
| <input type="checkbox"/> | Standard | No Show Listing                     | No Show Listing   |      |        |
| <input type="checkbox"/> | Standard | NURSING LEADERSHIP PROGRAM          |   |      |        |
| <input type="checkbox"/> | Standard | Student Listing                     | This report give all the student and is also group by selectors |      |        |

13 Reports (0 Selected) - Page 1 Of 1

Select All | Unselect All | Remove Selected | Remove Unselected

Report columns are sortable and the report lookup  allows for quick finding of reports (especially if multiple pages of reports are made available to managers).

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Report Name  Search

### Reports – Selecting Data (Details, Filters / Selectors)

Click on the Report Name (or anywhere in the report row) to bring up the Report Page for the selected Report.

## Report List

|  | Type     | Name ▲                             | Description   |
|---|----------|------------------------------------|---|
| <input type="checkbox"/>  | Standard | Completion Report Excel Exportable | Completion Report Excel Exportable with Enrolled,Cancelled By User,Completed Status |
| <input type="checkbox"/>  | Standard | Course & Instructor Evaluation     | Shows a graphical representation of the user responses per course instance.         |

### REPORT : COMPLETION REPORT EXCEL EXPORTABLE

PDF

#### ▼ User Info Details

Any Date:  Any Date  Date Range

Start Date:

End Date:

#### ▶ Selector

|               |                      |                                    |                                       |
|---------------|----------------------|------------------------------------|---------------------------------------|
| Course:       | <input type="text"/> | <input type="button" value="Add"/> | <input type="button" value="Remove"/> |
| Job Class:    | <input type="text"/> | <input type="button" value="Add"/> | <input type="button" value="Remove"/> |
| Job Code:     | <input type="text"/> | <input type="button" value="Add"/> | <input type="button" value="Remove"/> |
| Job Position: | <input type="text"/> | <input type="button" value="Add"/> | <input type="button" value="Remove"/> |

Enter the details and use the filters / Selectors to refine the report and lookup the details you seek.

Certain filters will require selection of options – e.g.

Any Date:  Any Date  Date Range

Date filters will generally allow free text date entry (mm/dd/yyyy) or allow selection from a popup calendar – e.g.

Start Date:

End Date:

December 2016

| S  | M  | T  | W  | T  | F  | S  |
|----|----|----|----|----|----|----|
| 27 | 28 | 29 | 30 | 1  | 2  | 3  |
| 4  | 5  | 6  | 7  | 8  | 9  | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

Lookup Filters / Selectors will link to a lookup list where you can sort, filter and search for the desired choices.

1. Click the **Add** button to bring up the related Lookup List.

Course: Add  
Remove

---

Select Learning Object

LEARNING OBJECT LOOKUP

Learning Object List Add Learning Object

| <input type="checkbox"/>            | ID    | Name  | Type |
|-------------------------------------|-------|---|------|
| <input type="checkbox"/>            | 14634 | 2016 - Become a Supervisor - Early Start Training         |      |
| <input checked="" type="checkbox"/> | 14590 | 2016 FSRMC RN 9N Transitional Care Unit Annual Competency |      |
| <input type="checkbox"/>            | 14542 | CBO SBO Customer Service Go Live Training                 |      |
| <input type="checkbox"/>            | 14594 | COMPETENCY TEST COURSES                                   |      |
| <input type="checkbox"/>            | 14592 | Course for Instructor Evaluation                          |      |

2. Sort, filter and search to find the desired objects.

3. Check the box to the left of these objects.

4. Click the "Add" button

The lookup list will close and the selected options will now be listed within lookup filter / selector text box.

Course: Add  
Remove

Defensive Driving  
Ebola Advanced Training

If wishing to remove selectors, highlight, then click **Remove**. *Note: Usually these items can be added in bulk, but must be removed one at a time.*

## Reports – View, Print & Export

After entering any user data and using filters / selectors to narrow down report to the desired data, the Manager can click to **Export Report** (in either PDF or Excel versions), **View Report** (which also allows for printing and to export in additional formats) or **Cancel** and return to the Report List.

PDF  
EXCEL

EXPORT REPORT

VIEW REPORT

CANCEL

If selecting to **View Report**, a new window will pop-up with the Report Information.

Enter text to search and click the search icon

Dropdown to go to first / last page or type in page # and click enter



Resize view

Drill down to deeper data levels (if available)

Navigate to Next / Prev page (page 1 and 2 only)

| Last Name | First Name | Employee ID       | Facility                | Facility Number | Department Name            | Department Number | Course Name             |
|-----------|------------|-------------------|-------------------------|-----------------|----------------------------|-------------------|-------------------------|
| Account   | Admin3     | admin3            | 3 MeduRx Plaza          | A-3MeduRx       | Early Intervention Program | 00100784          | Ebola Advanced Training |
| Hood      | Robin      | 11111testuser9001 | Fam Med - 639 MeduRx St | A-639Med        | Fam Med - Urban Health     | 07630959          | Ebola Advanced Training |
| Inst7     | Sand       | UdotInst7         | 3 MeduRx Plaza          | A-3MeduRx       | Early Intervention Program | 00100784          | Ebola Advanced Training |
| Inst8     | Sand       | UdotInst8         | 3 MeduRx Plaza          | 3 MeduRx        | Behavioral Health Dept     | 201               | Ebola Advanced Training |
| Inst9     | Sand       | UdotInst9         | 3 MeduRx Plaza          | 3 MeduRx        | Behavioral Health Dept     | 201               | Ebola Advanced Training |
| Jones     | Joseph     | jjones            | Kelemen Bldg            | A-KELEMEN       | Emergency Room             | 00100906          | Defensive Driving       |
| Kaufman   | Dan        | dKaufman          | Kelemen Bldg            | A-KELEMEN       | Emergency Room             | 00100906          | Ebola Advanced Training |
| Khanna    | Rishab     | 11112             | Fam Med - 639 MeduRx St | A-639Med        | Fam Med - Urban Health     | 07630959          | Ebola Advanced Training |

Click the **Print** icon to Print the Report to a PDF where it can be sent to your printer. Select pages and click the **Export** button.

Print to PDF

Page Range: \_

All Pages

Select Pages

From:

To:

Print to PDF: \_\_\_\_\_

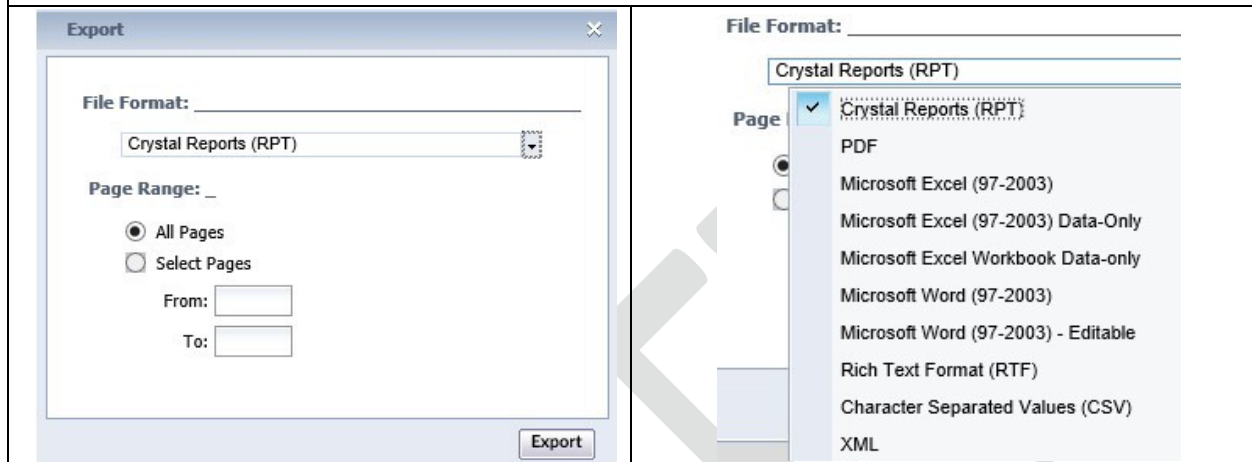
The viewer must export to PDF to print. Choose the Print option from the PDF reader application once the document is opened. Note: You must have a PDF reader installed to print. (eg. Adobe Reader)

Export

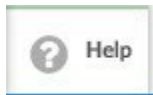
To export, click the **Export** icon...



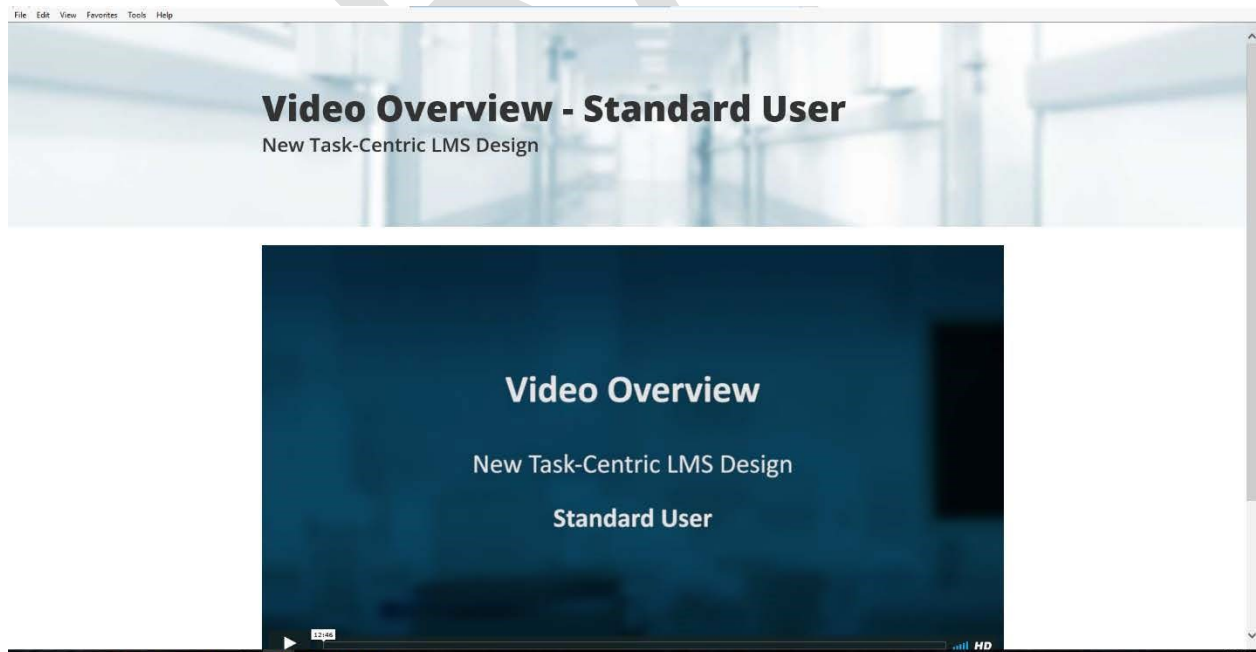
...to open the Export dialog. Select a file format and page range, then click **Export**.



## Help Tab



If your LMS is configured with a Help Tab, Click the Help Tab Icon to access User Guides, Help Documents and Videos in a separate window. Your organization may provide additional information.





## Log Out

When finished with your LMS session, click the **Log Out** text link in the upper left hand corner to Log Out.

