



# LMS Manager Job Aid

## Prerequisites

- Confirm that you are signed in as a **Manager**.

This document covers the following topics. Click each link to go directly to that section.

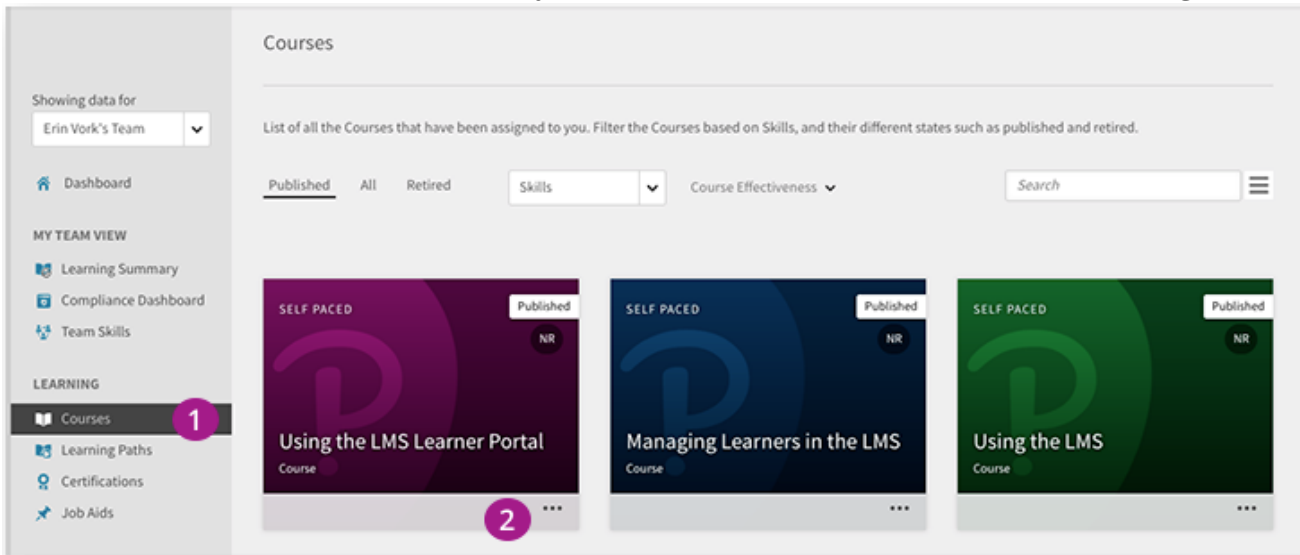
- [Enroll Learners](#)
- [Compliance Dashboards](#)
- [Navigate Learning Summary](#)
- [Reports Dashboard](#)
- [Adding Reports](#)

# Enroll Learners

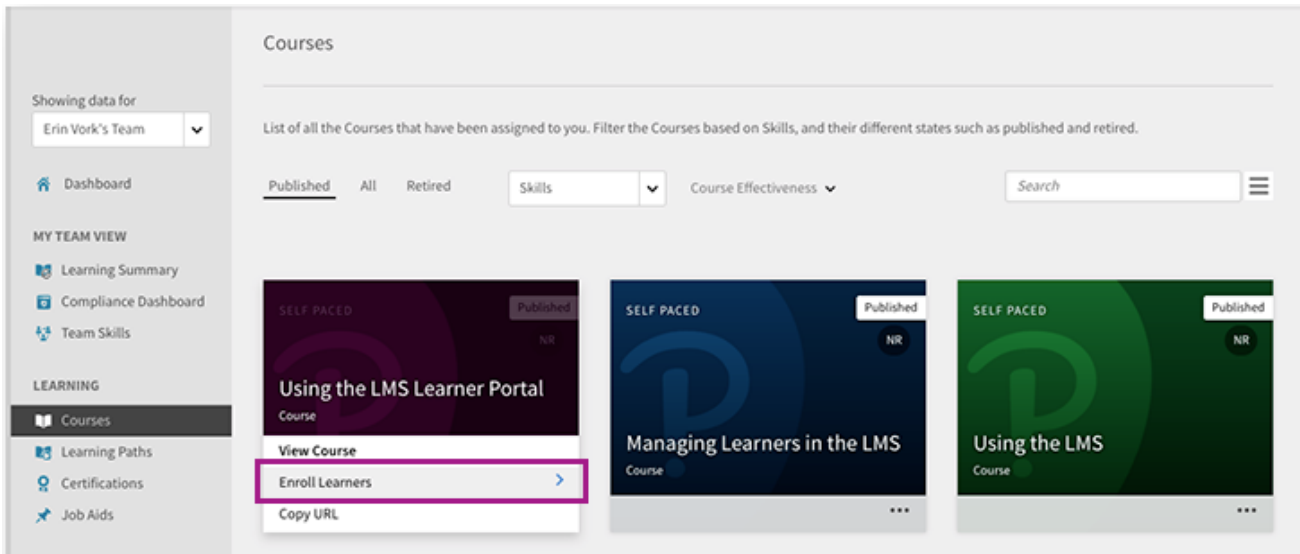
Managers can enroll Learners in courses, including Self Enrolled courses, individually or by user group.

## Step-by-step

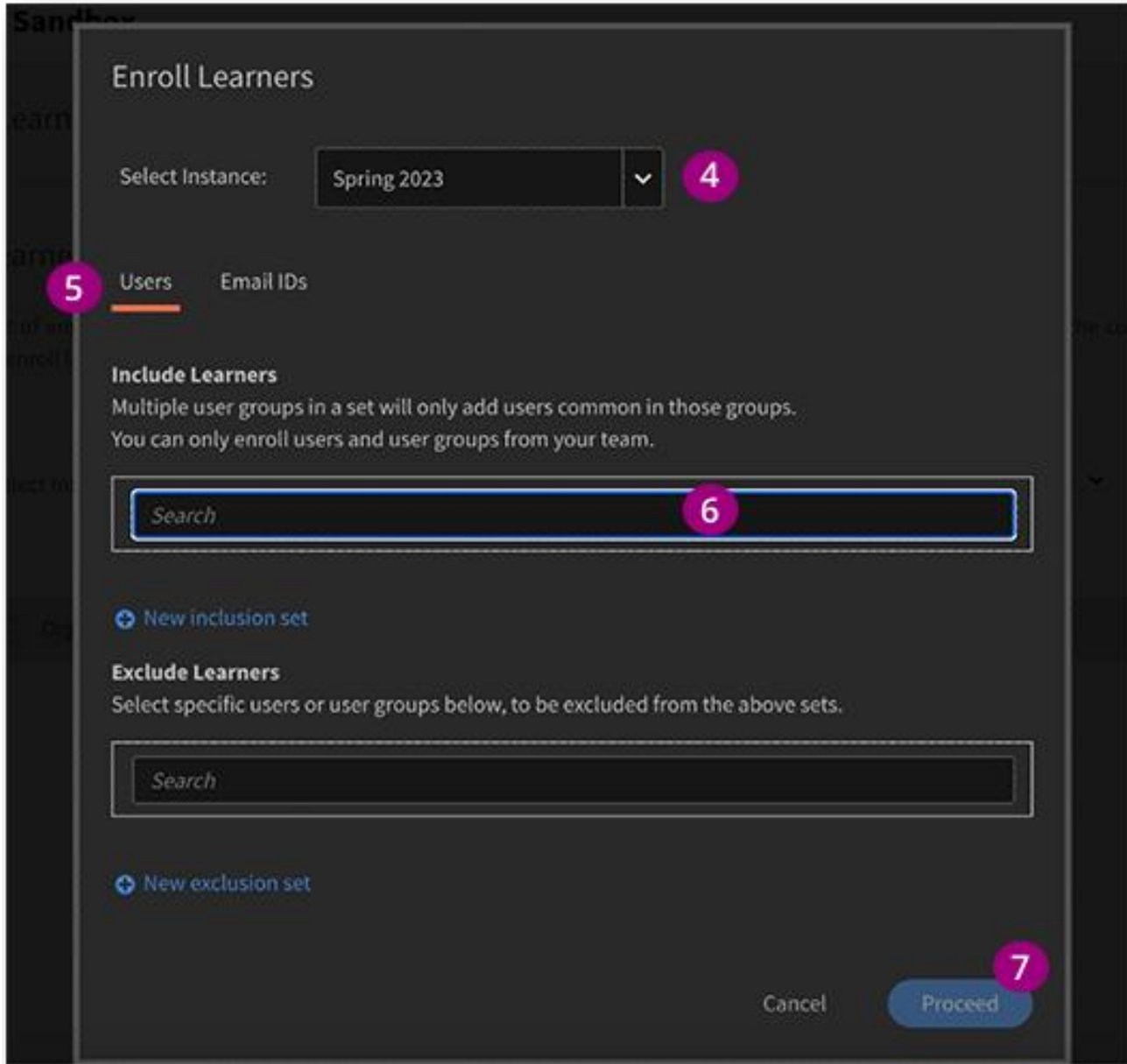
1. Select **Courses** from left panel.
2. Locate the course, then hover your mouse over the 3 dots on the bottom right corner.



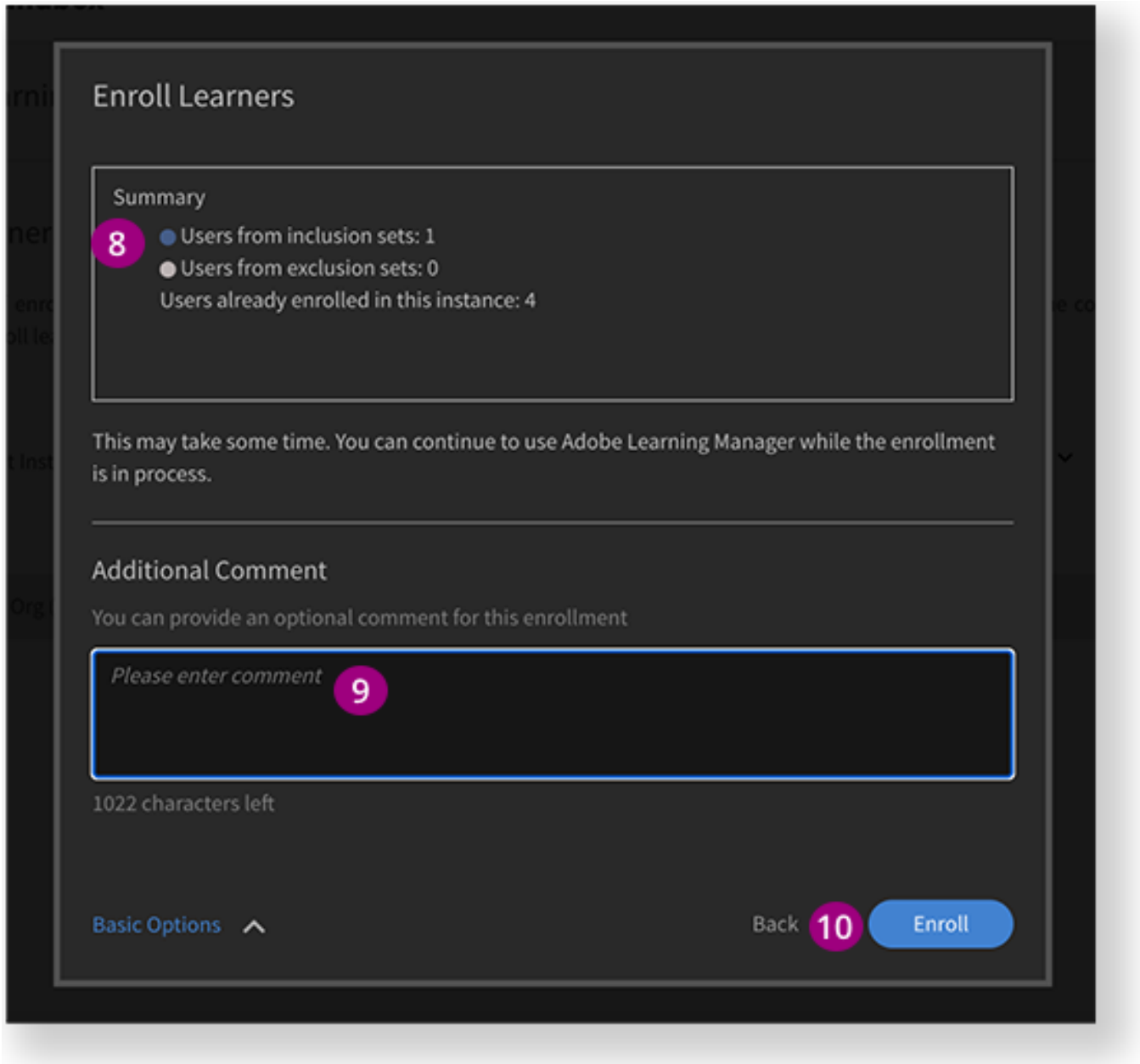
3. Select **Enroll Learners**.



4. Assign an instance in the **Select Instance** dropdown.
5. By default, you are prompted with the **Users** tab.
  - a. Enroll learners based on User Groups.
  - b. Select the **Email IDs** tab to enroll Learners by entering their email(s).
6. Under **Include Learners**, search and select Learners to enroll them by **User** or **User Group**.
7. Select **Proceed**.



8. View the **Summary** to verify your selections.
9. Select the **Advanced Options** dropdown and enter an **Additional Comment** if needed.
10. Select **Enroll**.



11. You are brought to a page with information about the course.

- a. Select the dropdown to view enrolled Learners.
- b. View the **Status** of individual Learner progress.

The screenshot displays the 'Using the LMS Learner Portal' interface. On the left is a navigation sidebar with sections for 'MANAGE' (Learners) and 'REPORTS' (L1 Feedback, L2 Quiz Score, L3 Feedback, Subscriptions), and a 'PREVIEW' section (Preview as Learner). The main content area is titled 'Learners' and includes a 'Showing data for' dropdown set to 'Org (Sample Scho...)', a 'Back' button, and a 'Select Instance:' dropdown set to 'Spring 2023'. There are 'Enroll' and 'Actions' buttons, and a 'Search learners' input field. Below this is a table of learners with checkboxes, names, and status. A purple circle 'a' highlights the 'Status' column header, and a purple circle 'b' highlights the 'Not Started' status for the learner 'Jon'.

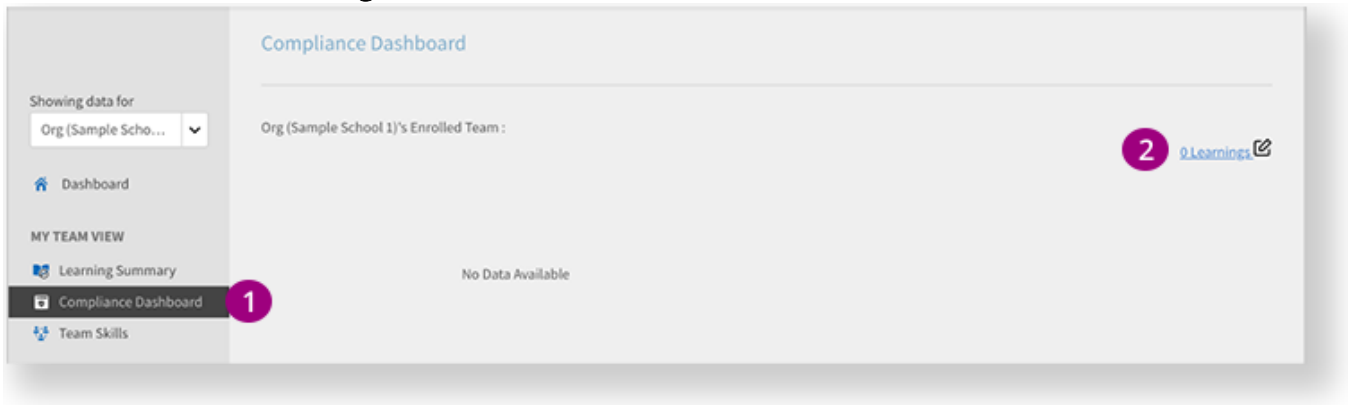
<input type="checkbox"/>	Org (Sample School 1)	Status	
<input type="checkbox"/>	Carrie	Completed	
<input type="checkbox"/>	Chris	Not Started	
<input type="checkbox"/>	Jon	Not Started	b
<input type="checkbox"/>	Sajda	Completed	

# Compliance Dashboards

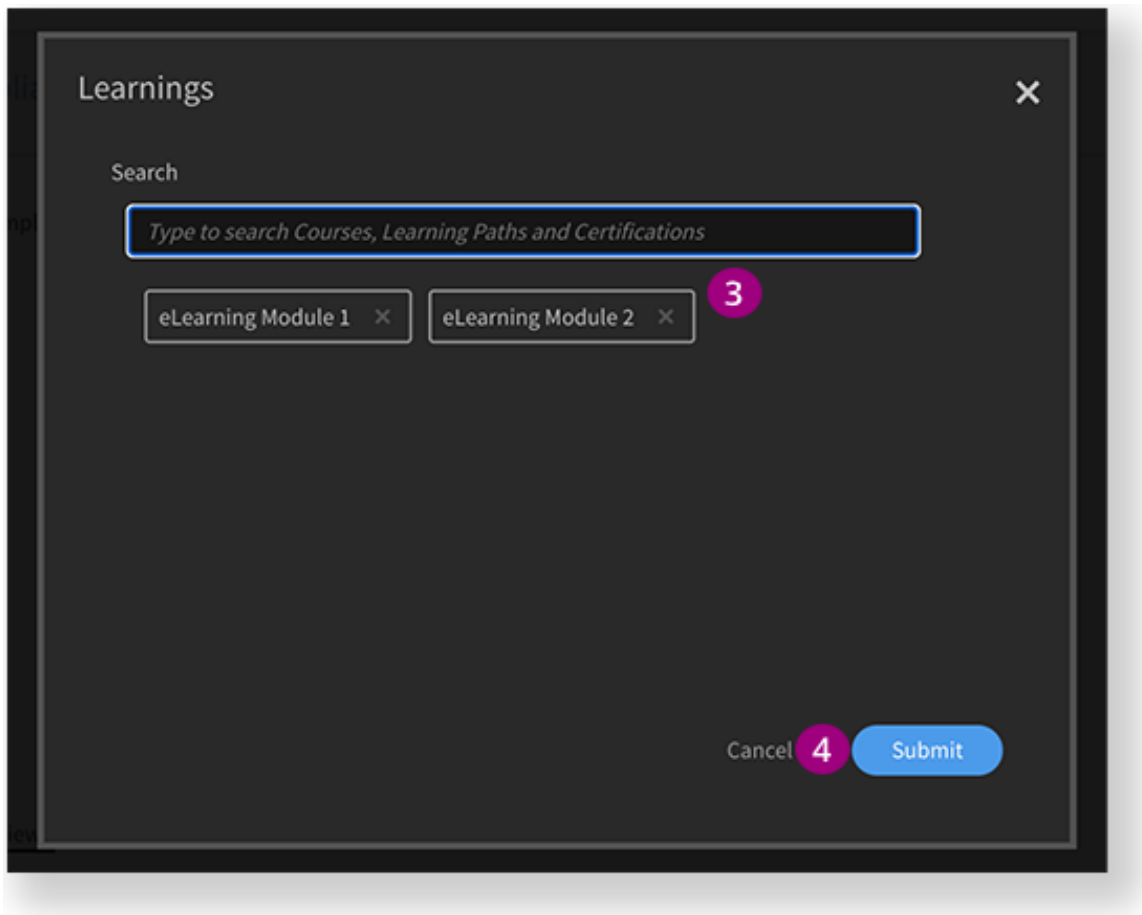
The **Compliance Dashboard** is used to track Learner and course progress by adding one or more courses, learning paths, and/or certificates.

## Step-by Step

1. Select **Compliance Dashboard** from the left panel.
2. Select the **Learnings** link.



3. Enter data to search and make selections in the dropdown. Repeat as needed.
4. Select **Submit** to see results.



5. View results. You can select the **Learnings** link to add or remove criteria.
  - a. Track progress by Learner with **Team View**.
  - b. Track progress by course with **Learnings View**.

Showing data for  
Org (Sample Scho... ▾

Dashboard

MY TEAM VIEW

- Learning Summary
- Compliance Dashboard**
- Team Skills

LEARNING

- Courses
- Learning Paths
- Certifications
- Job Aids

VIEW

- Reports
- Notifications

### Compliance Dashboard

Org (Sample School 1)'s Enrolled Team : 5

2 Learnings

eLearning Module 1 × eLearning Module 2 ×

60% Fully Compliant Learners  
40% Learners with Safe Deadlines (> 30 days)  
0% Learners with Upcoming Deadlines (< 30 days)  
0% Learners who are Non Compliant

Org (Sample School 1) (6)

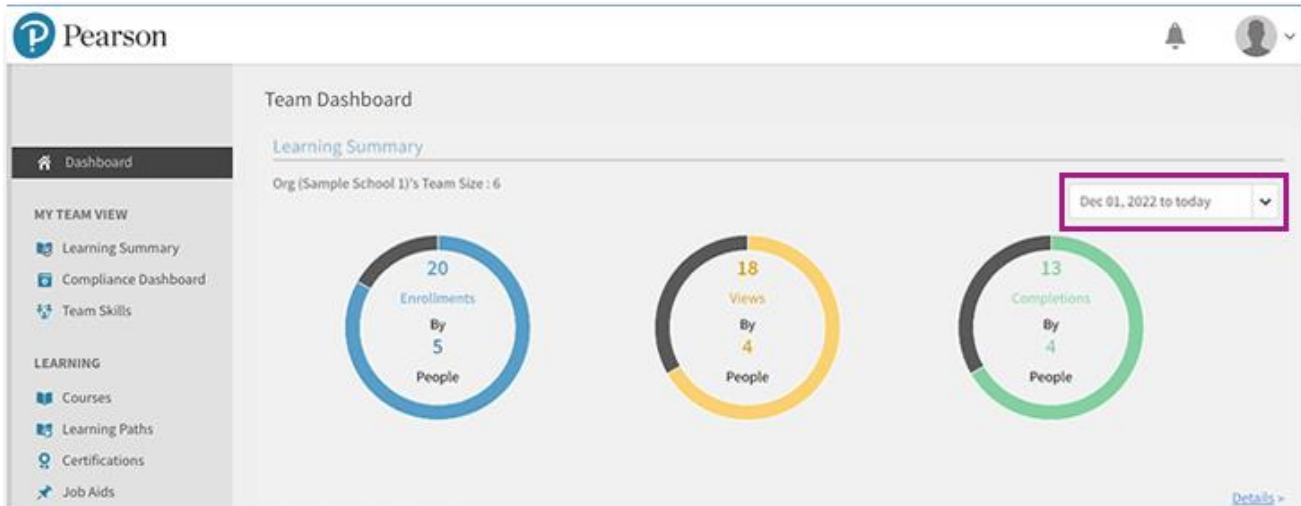
**a** Team View **b** Learnings View

<input type="checkbox"/> Team & Members	Compliant	Safe Deadline	Upcoming Deadline	Non Compliant
<input type="checkbox"/> Carrie	1	0	0	0
<input type="checkbox"/> Joe	0	1	0	0

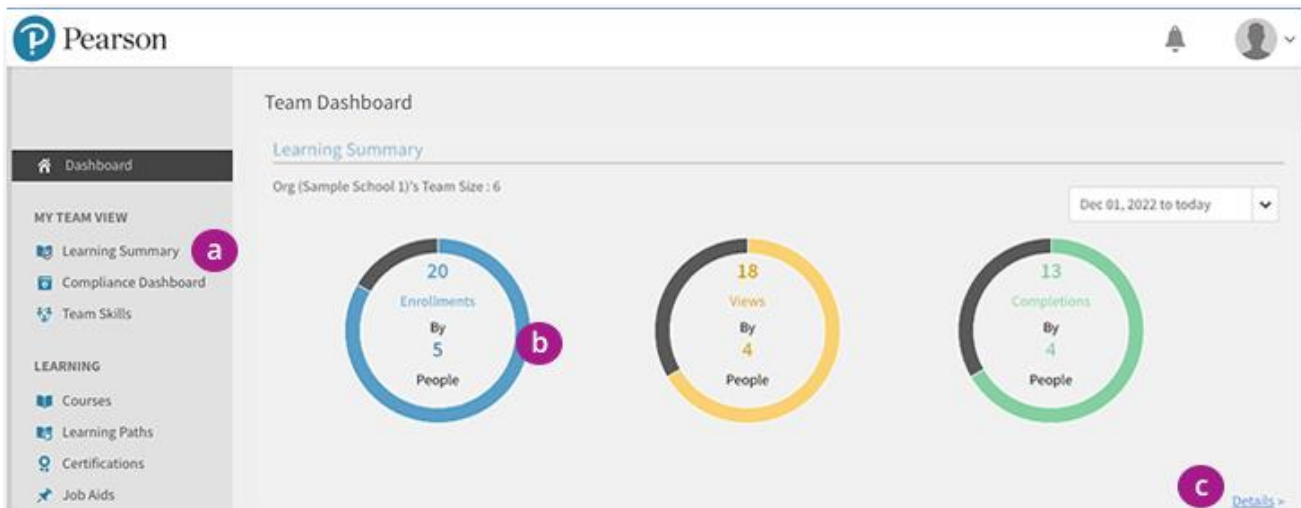
# Navigate Learning Summary

Upon sign in, you'll see the **Dashboard**. By default, managers see the **Learning Summary**, which tracks counts of user **Enrollments**, **Views**, and **Completions** across all available trainings.

1. Select the dropdown, then select a date range. By default, the LMS shows the most recent dates.



2. There are three ways to access more information about the **Learning Summary**.
  - a. Select **Learning Summary** from the left panel.
  - b. Select a highlighted portion(?) of any graph.
  - c. Select the **Details** link.





- On the **Learning Summary** page, you can track progress with more detail using **Team View** (by Learner) and **Learnings View** (by course).

The screenshot shows the 'Learning Summary' page for 'Org (Sample School 1)'. The page title is 'Learning Summary' and it shows data for the duration of 'Dec 01, 2022 to today'. The left sidebar includes 'Dashboard', 'MY TEAM VIEW' (with 'Learning Summary' selected), and 'LEARNING' (with 'Courses', 'Learning Paths', 'Certifications', and 'Job Aids'). The main content area has two tabs: 'Team View' (selected) and 'Learnings View'. Below the tabs is a table with columns for 'Team & Members', 'Enrollments', 'Views', and 'Completions'. The table lists six team members with their respective counts.

Team & Members	Enrollments	Views	Completions
Carrie	2	2	1
Jon	1	0	0
Chris	5	6	4
Erin	9	7	5
Sajda	3	3	3

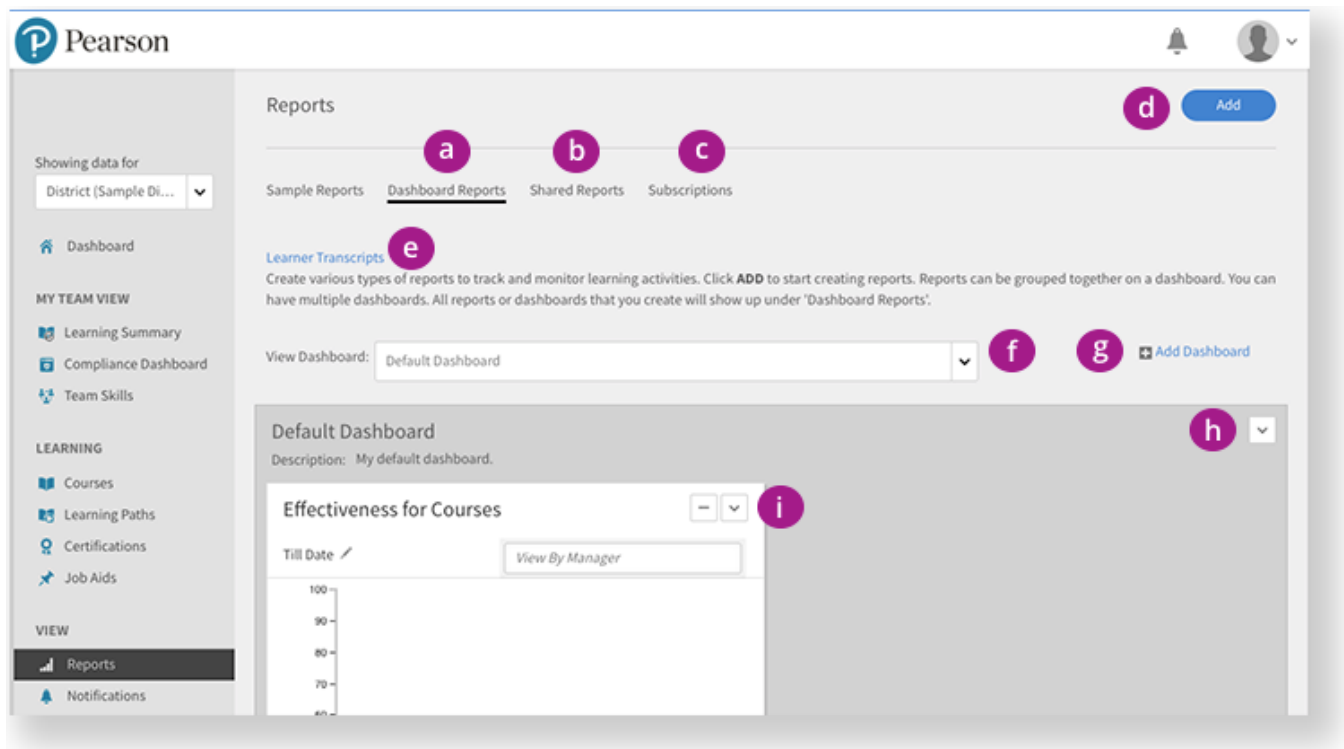
- You can select any count in the **Enrollments**, **Views**, or **Completions** columns to see more information.

The screenshot shows the 'Learning Summary' page for 'District (Sample District 3)'. The page title is 'Learning Summary' and it shows data for the duration of 'May 01, 2022 to Apr 30, ...'. The left sidebar includes 'Dashboard', 'MY TEAM VIEW' (with 'Learning Summary' selected), and 'Team Skills'. The main content area has a link to 'Back To District (Sample District 3)' and a tab for 'Learnings Enrolled: Jonathan'. Below the tab is a table with columns for 'Learnings(25)', 'Enrollment Date', 'Due Date', and 'Progress'. The table lists three learning items with their enrollment dates and progress percentages.

Learnings(25)	Enrollment Date	Due Date	Progress
V7 G9-12 Practice Completions Scorm2004 Sandbox Test	Feb 16, 2023	Not Available	0%
V6 G9-12 Practice Completions Scorm2004 Sandbox Test	Feb 16, 2023	Not Available	100%
V5 G9-12 Practice Completions Scorm2004 Sandbox Test	Feb 16, 2023	Not Available	0%

# Reports Dashboard

On the **Reports** page, you can create custom dashboards and reports to view LMS data in one place. You can select and drag your reports in an order that best suits your needs.

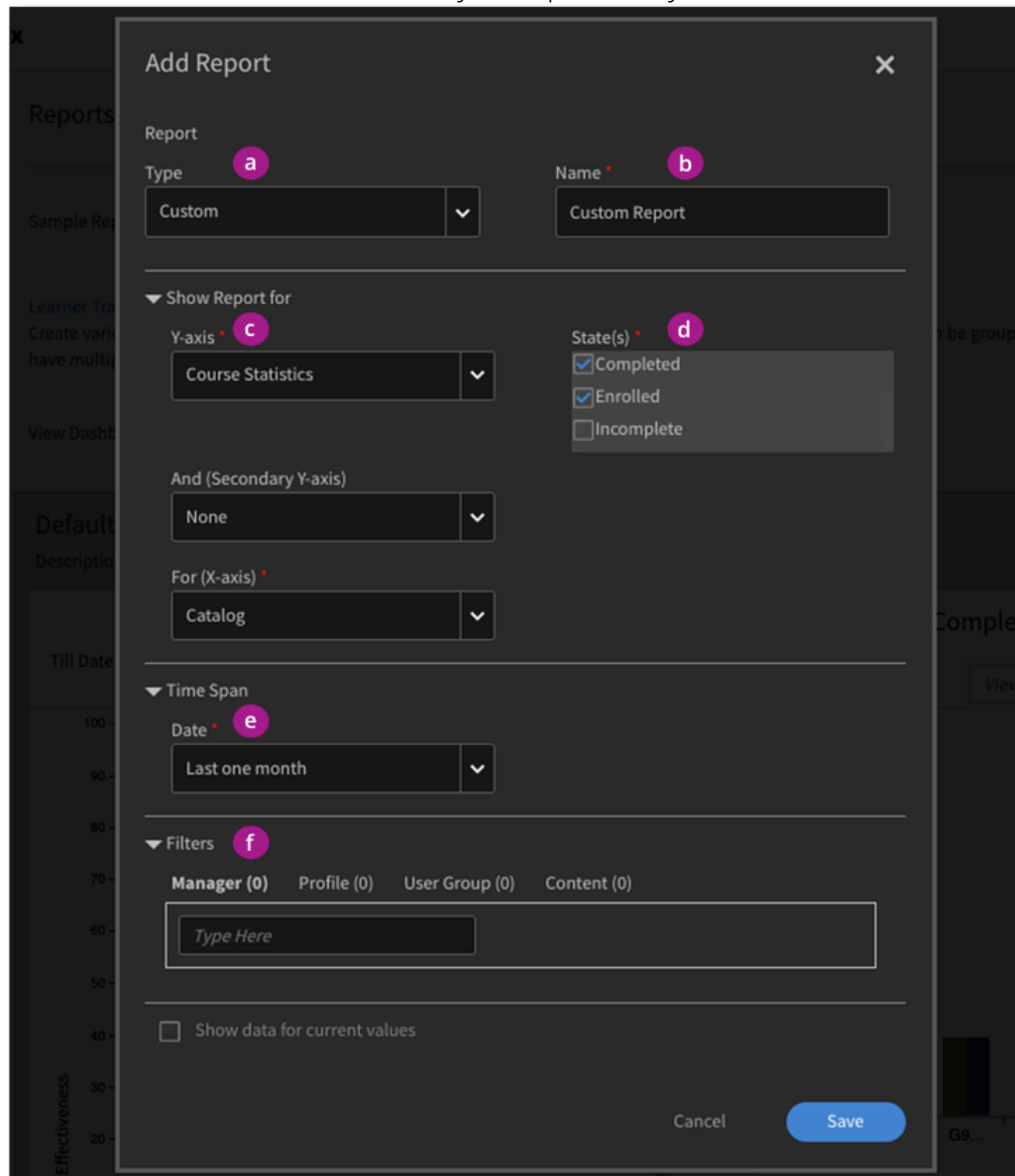


The table below describes the purpose of each area on the **Reports** page.

Reports Dashboard Overview	
a. Dashboard Reports	Displays dashboards and reports that you've created.
b. Shared Reports	View reports that other users have shared with you.
c. Subscriptions	Schedule dashboard reports to be emailed to you. Search for a report, then select the checkmark to add it.
d. Add	Add a report to <b>Dashboard Reports</b> .
e. Learner Transcript	A detailed list of a learners LMS activity. You can run this report for an individual user or for an entire group.
f. View Dashboard	Select which dashboard you want to view. When you select the <b>Add</b> button, the new report is added to the selected dashboard.
g. Add Dashboard	A dashboard is a collection of reports. If you find yourself creating and viewing numerous reports, you may wish to organize them on separate dashboards.
h. Dashboard Dropdown	Select to <b>Add Report</b> , <b>Edit Dashboard</b> , or <b>Delete Dashboard</b> . You cannot edit or delete the <b>Default Dashboard</b> .
i. Report Dropdown	Select to modify, download, copy, or move a report. Select the minus on the left to hide the report.

# Adding Reports

You can create and add a variety of reports to your dashboards.



The table below describes the purpose of each area on the **Add Report** window.

Add Report Overview	
a. Type	Select a pre-configured report in the dropdown or select <b>Custom</b> to create a custom report.
b. Name	Enter a name for the report.
c. Show Report for	Select a Y and X-axis for custom reports.
d. State(s) (if applicable)	This only appears for certain report data selections and filters for the information you want to see on the report.
e. Time Span	Adjust the time span for the data pulled.
f. Filters	Filter your report to focus on critical information. Depending on your report data selections, a filter may be required.