LMS Manager Job Aid

Prerequisites

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

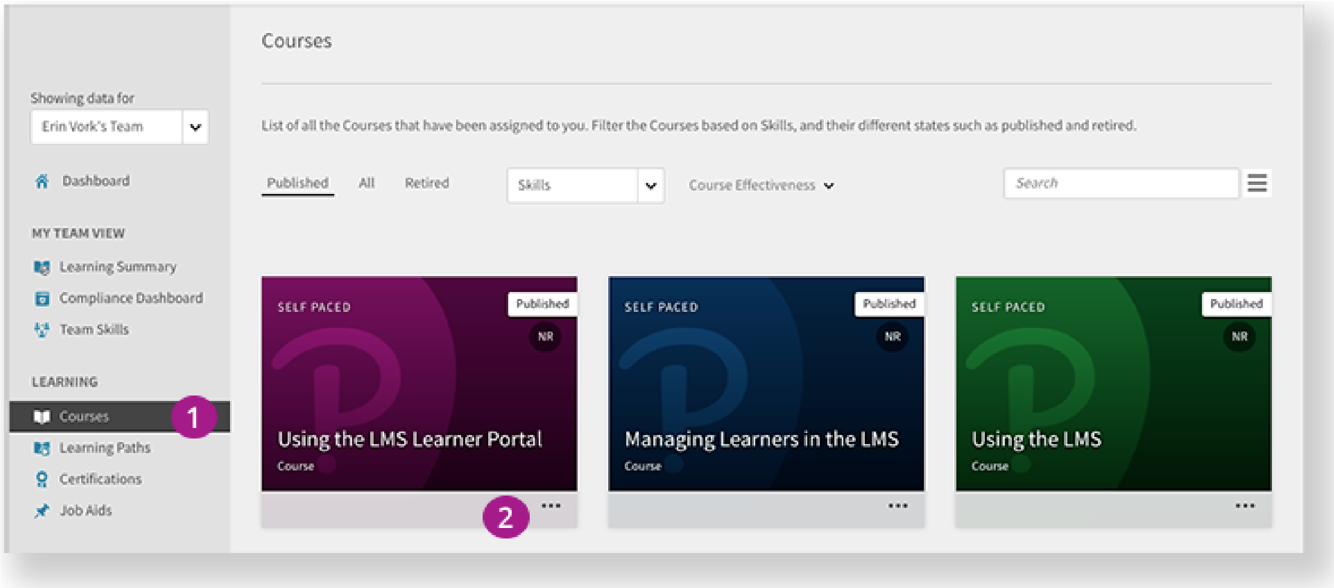
This document covers the following topics. Click each link to go directly to that section.

Enroll Learners

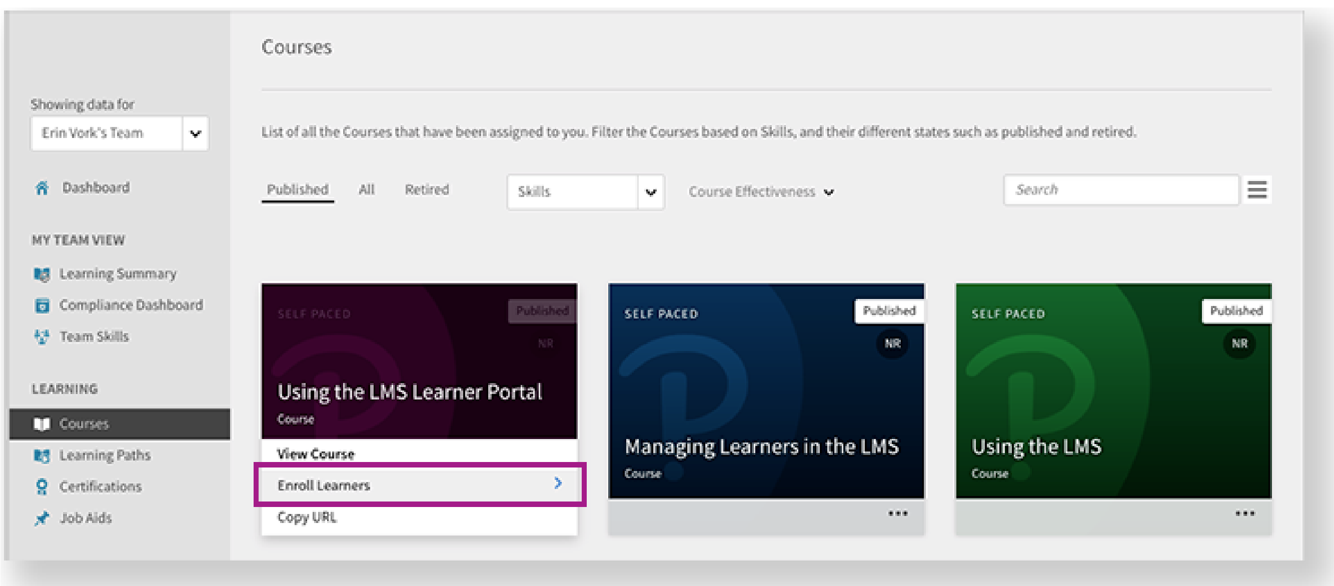
Managers can enroll Learners in courses, including Self Enrolled courses, individually or by user group.

Step-by-step

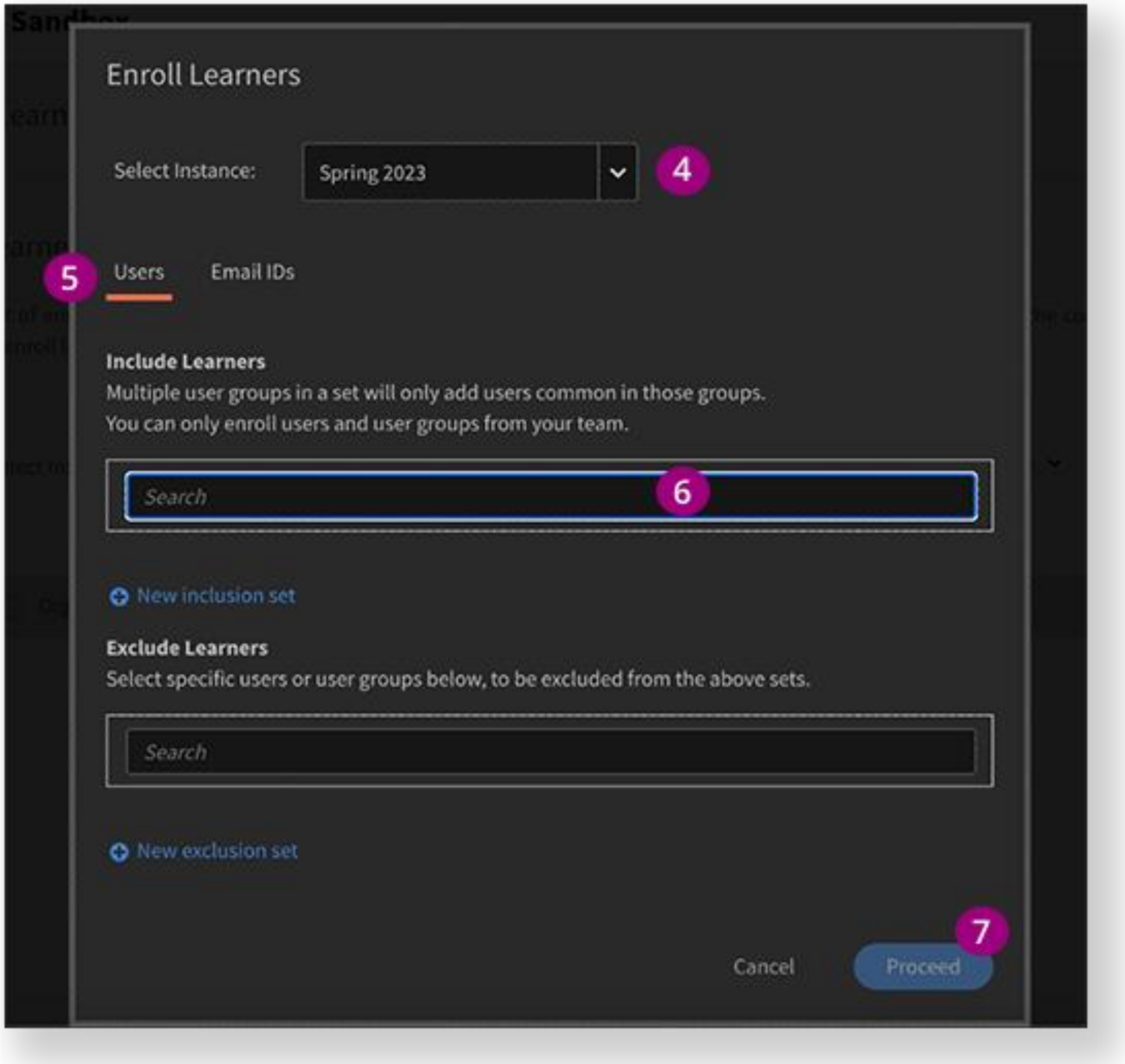
1. Select **Courses** from left panel.
2. Locate the course, then hover your mouse over the 3 dots on the bottom right corner.



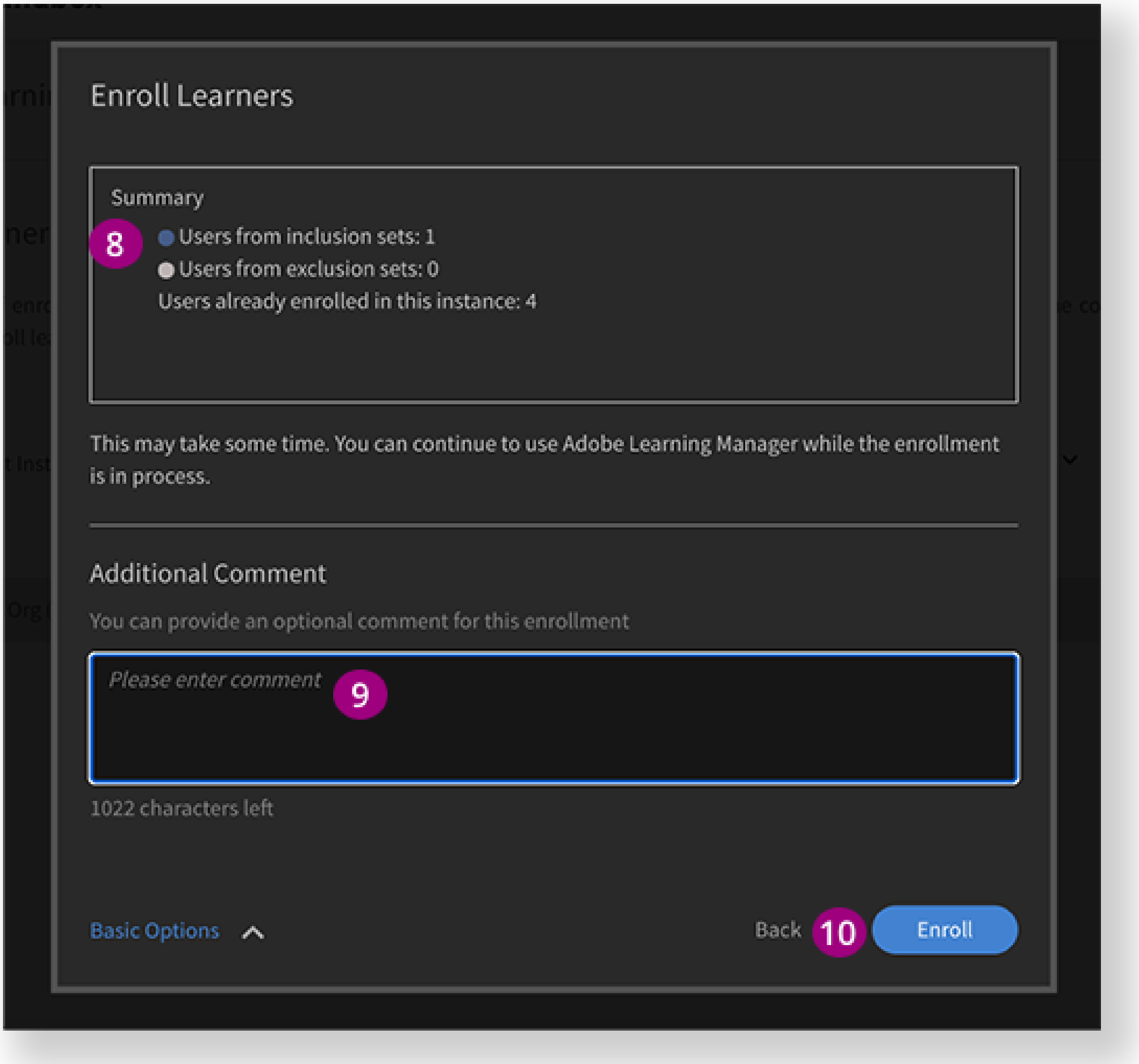
3. Select **Enroll Learners**.



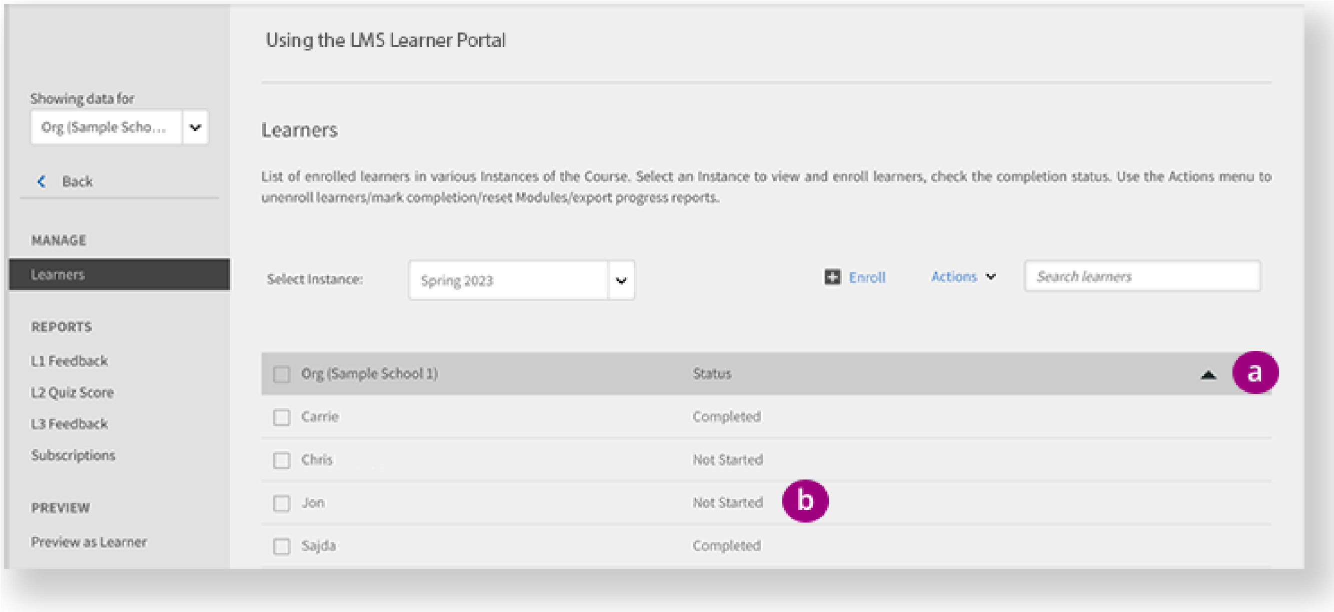
4. Assign an instance in the **Select Instance** dropdown.
5. By default, you are prompted with the **Users** tab.
    a. Enroll learners based on User Groups.
    b. Select the **Email IDs** tab to enroll Learners by entering their email(s).
6. Under **Include Learners**, search and select Learners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

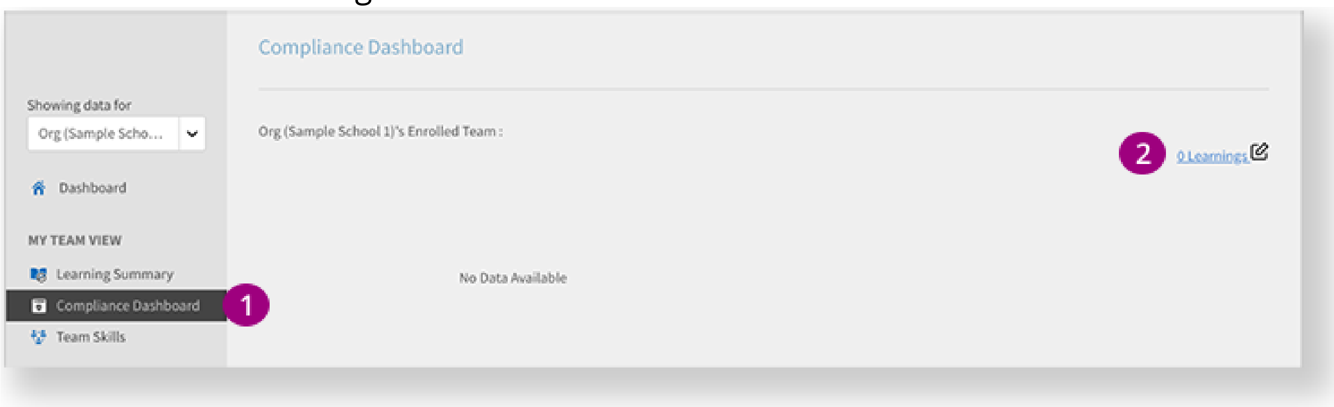


Compliance Dashboards

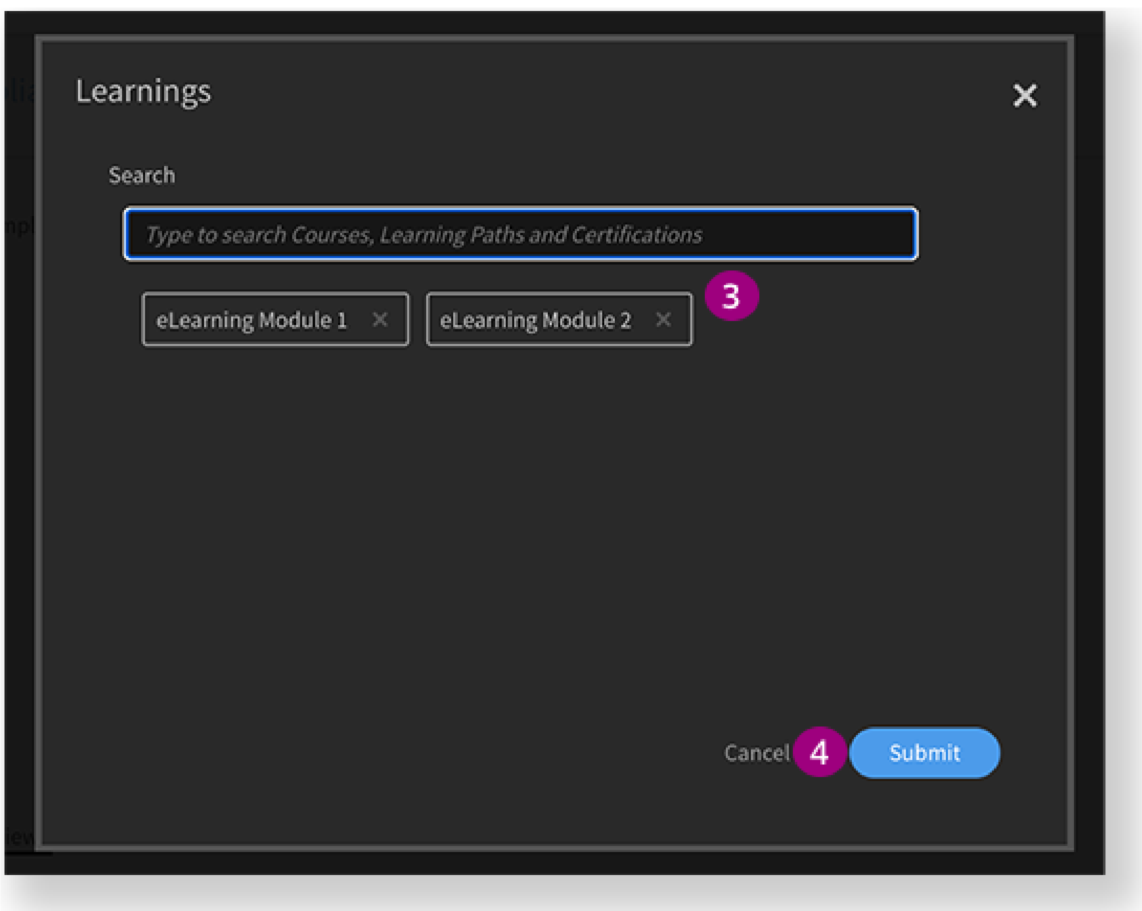
The **Compliance Dashboard** is used to track Learner and course progress by adding one or more courses, learning paths, and/or certificates.

Step-by Step

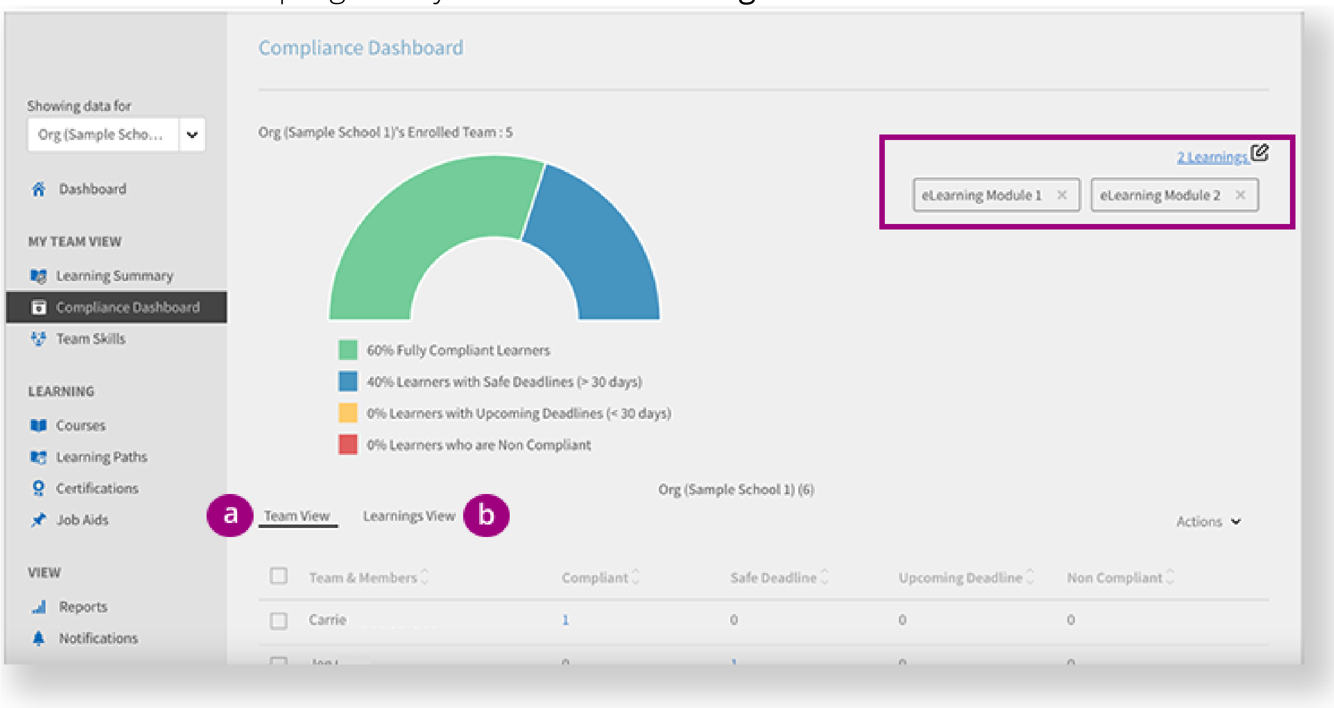
1. Select **Compliance Dashboard** from the left panel.
2. Select the **Learnings** link.



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



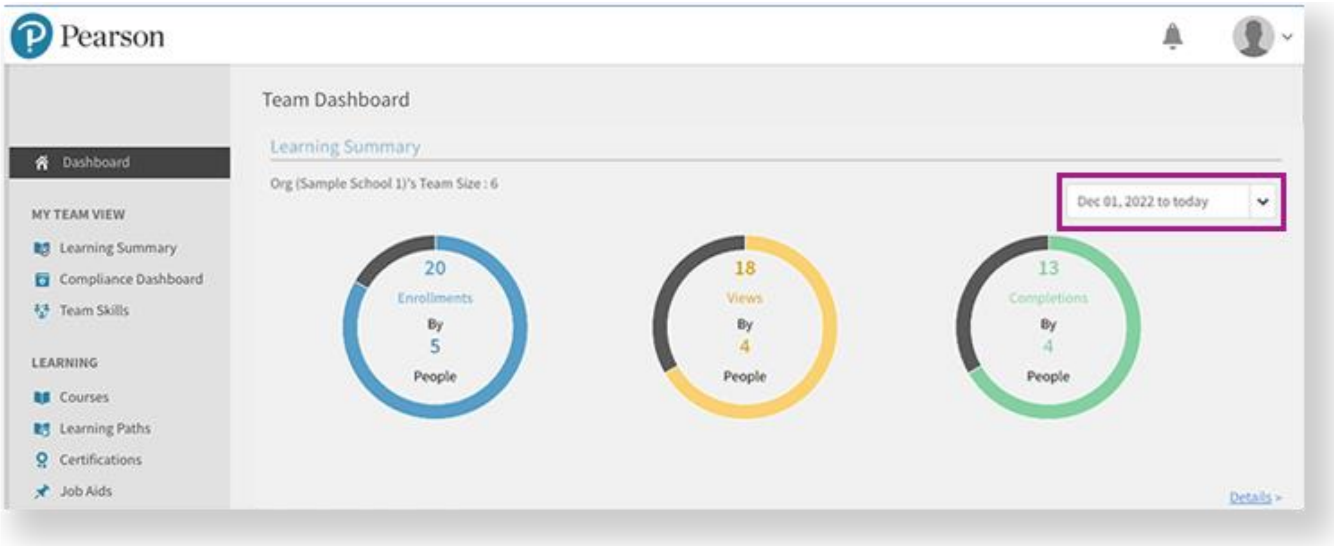
5. View results. You can select the **Learnings** link to add or remove criteria.
    a. Track progress by Learner with **Team View**.
    b. Track progress by course with **Learnings View**.



Navigate Learning Summary

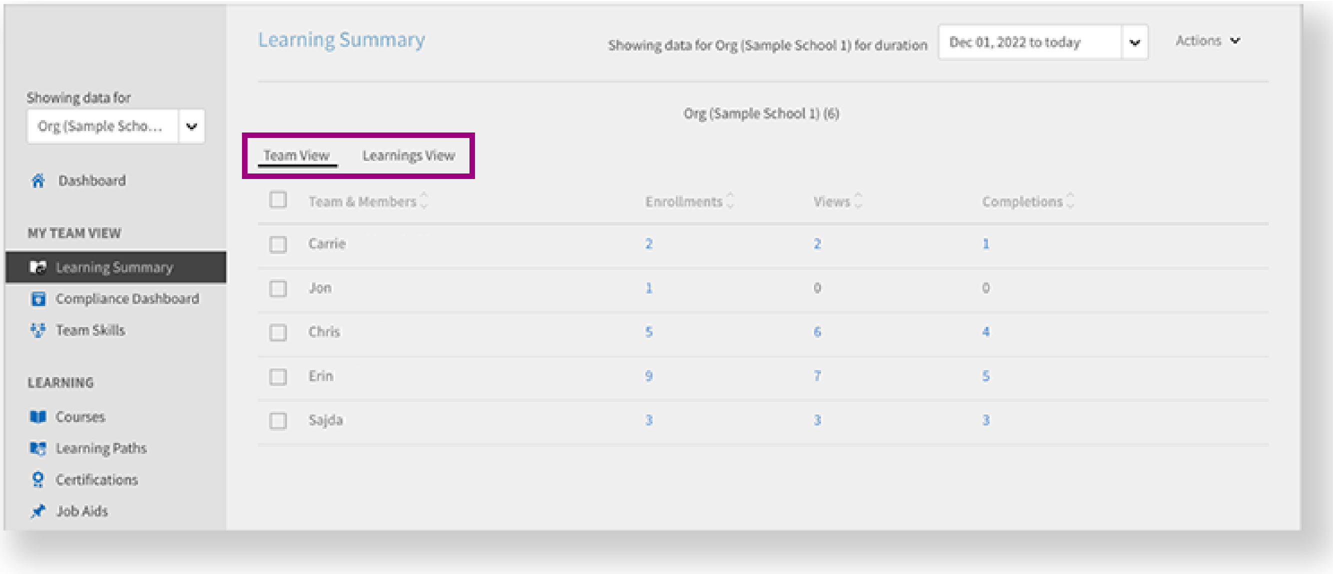
Upon sign in, you'll see the **Dashboard.** By default, managers see the **Learning Summary**, which tracks counts of user **Enrollments**, **Views**, and **Completions** across all available trainings.

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

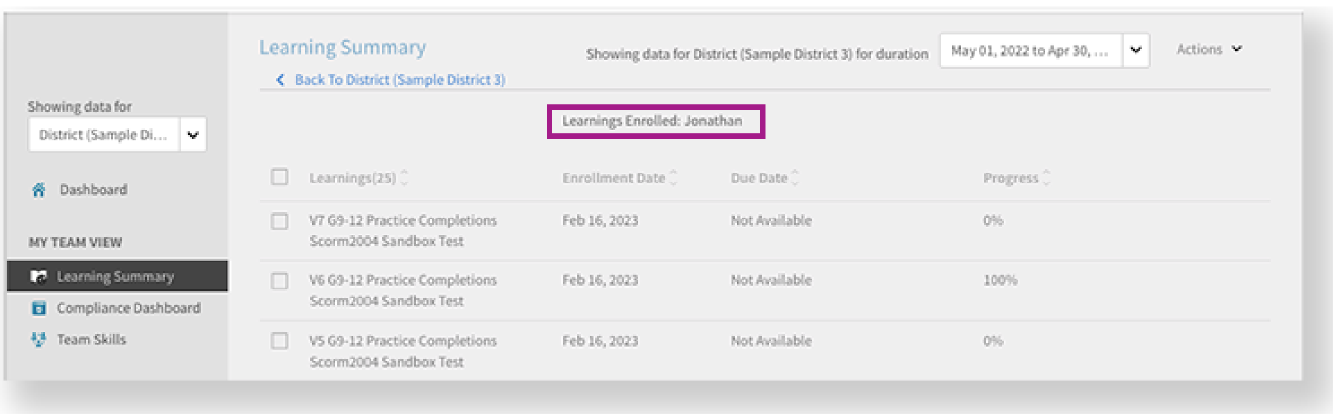


2. There are three ways to access more information about the **Learning Summary**.
    a. Select **Learning Summary** from the left panel.
    b. Select a highlighted portion(?) of any graph.
    c. Select the **Details** link.

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

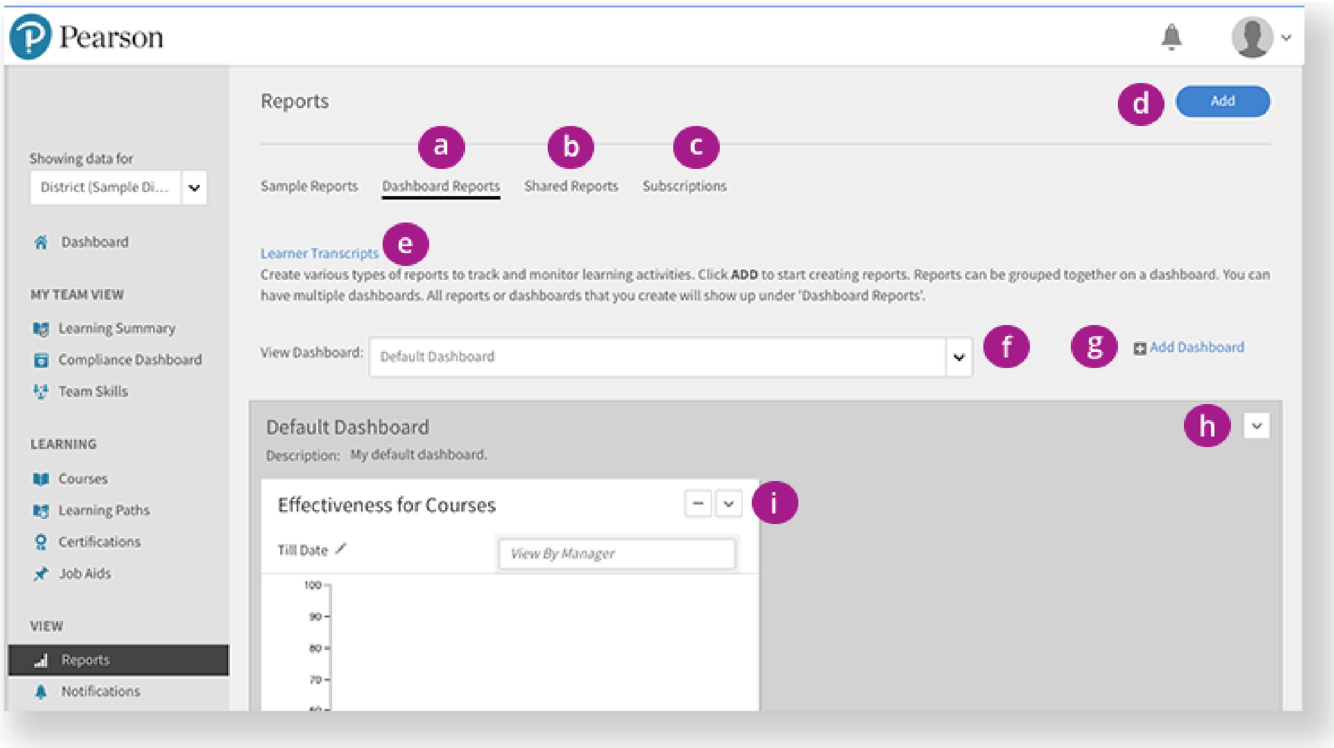


4. You can select any count in the **Enrollments**, **Views**, or **Completions** columns to see more information.



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.

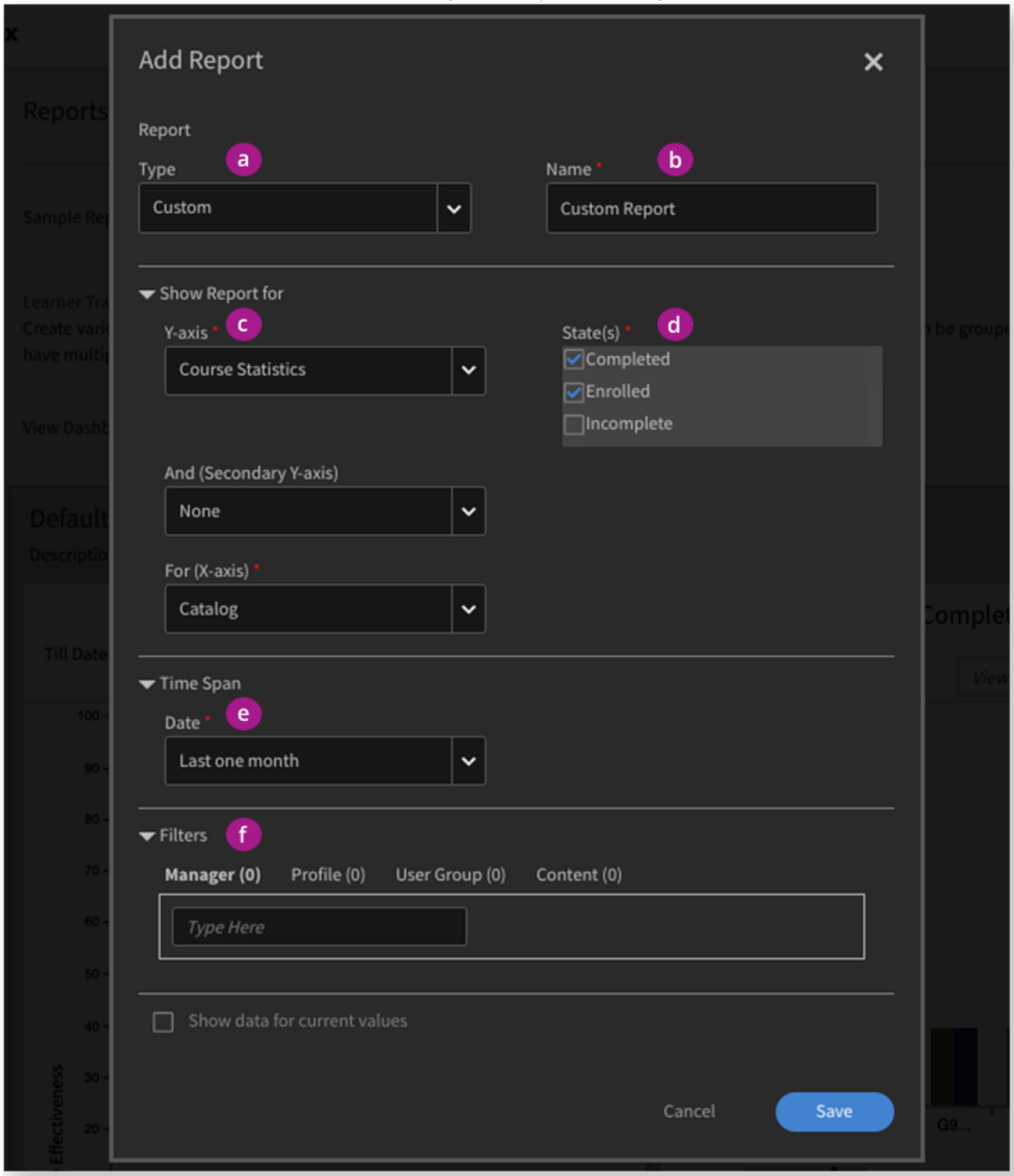


The table below describes the purpose of each area on the **Reports** page.

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 **Dashboard Reports**.
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 **Add** 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 **Add Report**, **Edit Dashboard**, or **Delete Dashboard**. You cannot edit or delete the **Default Dashboard**.
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 **Custom** 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.