Learning Management System ("LMS")

User Manual: Manager

V NLFMG-03092017-1

Disclaimer and Warranty Information

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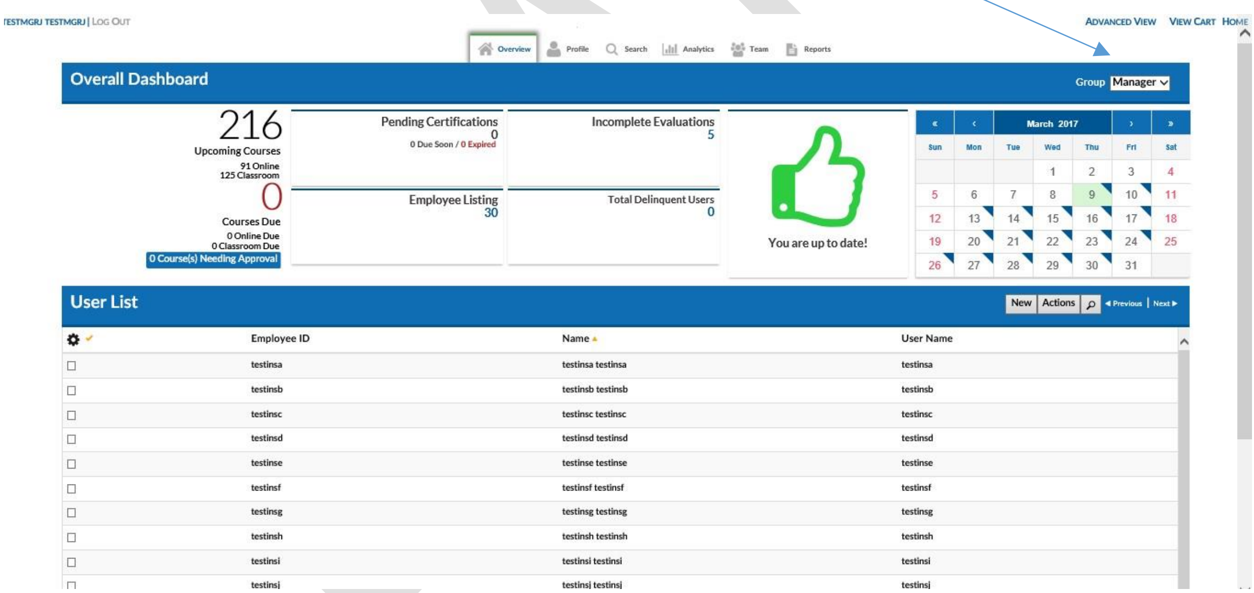
INTRODUCTION

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***.

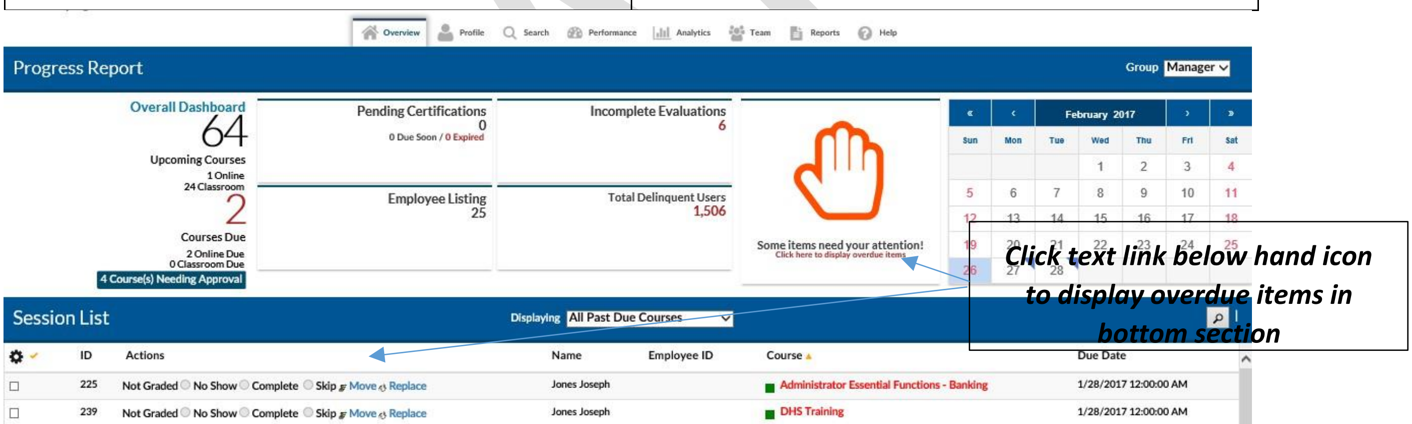


The top section, **Overall Dashboard,** provides key metrics pertaining to the course, certification and evaluation completion status of your team members, an overall status icon and a calendar of available courses. By default, the bottom Section, **User List**, provides an alphabetical listing of your 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).*

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

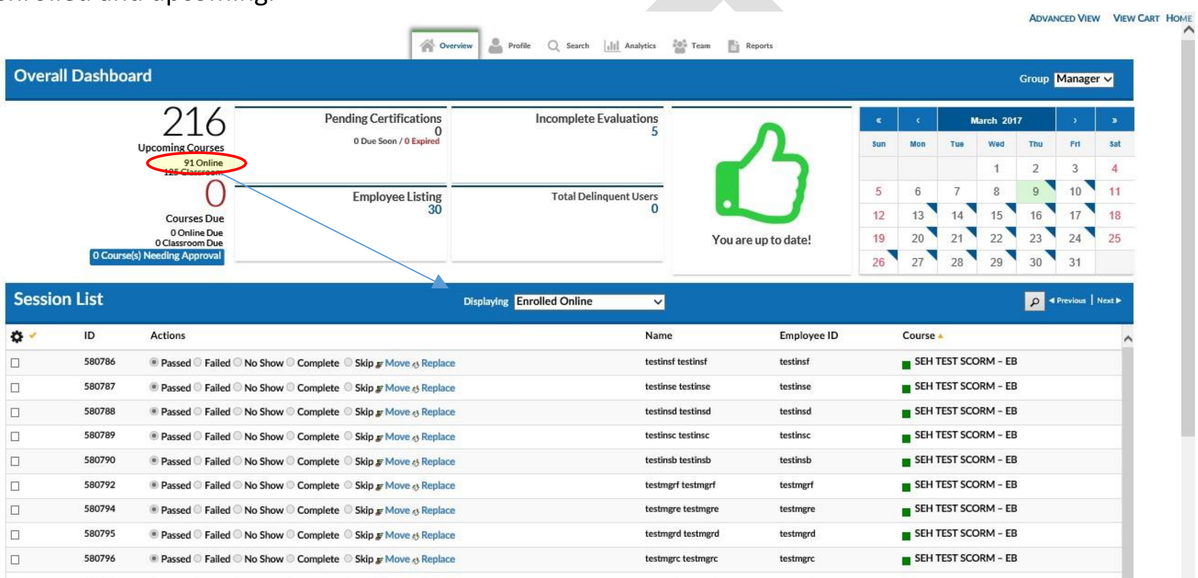


Overview Tab – Overall Dashboard - Metrics

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.



Manager Metrics - Definitions

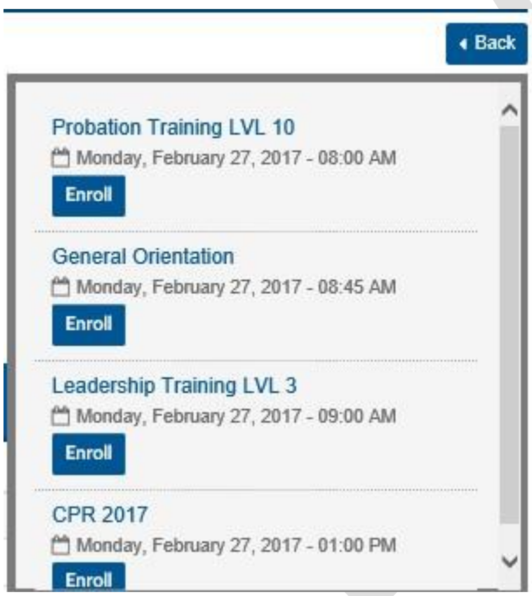
64 Upcoming Courses 1 Online 24 Classroom	**Upcoming Course** – A count of both Online and Classroom courses for which your team members been assigned or enrolled, but have not yet completed and whose deadlines have not passed nor whose class dates have passed • **Online** – A count of assigned / enrolled online courses only • **Classroom** - A count of assigned / enrolled Classroom courses only
2 Courses Due 2 Online Due 0 Classroom Due	**Courses Due**– A count of Online and Classroom courses which your team members have not completed, but whose scheduled class time or assigned deadlines have passed. • **Online** – A count of your team's online overdue courses only • **Classroom** - A count of your team's Classroom overdue courses only
Pending Certifications 0 0 Due Soon / 0 Expired	**Pending Certifications** – A count of certifications for which your team members have enrolled, but note yet completed. • **Due Soon** – A count of Certifications with due dates after the current date • **Expired** – A count of Certifications with due dates that have passed and are overdue
Incomplete Evaluations 6	**Incomplete Evaluations** – 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.
Employee Listing 25	**Employee Listing** – A total count of your active team members in the LMS system
Total Delinquent Users 1,506	**Total Delinquent Users** – A count of team members who have overdue learning activities.

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.

<table>
<tr><th>Overview – Manager View - Calendar</th><th>Calendar – Rolling over date with blue shading</th></tr>
<tr><td>
</td><td>
</td></tr>
</table>

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)*.



<u>You can also directly enroll your team members</u> into a selected course instance scheduled for that day by….

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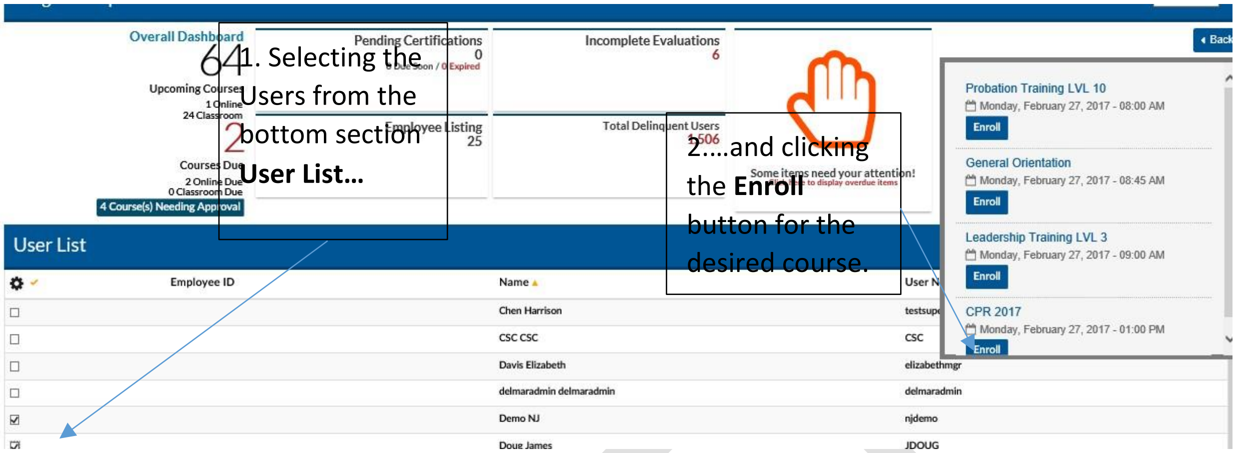

After clicking Enroll, the screen will refresh and a confirmation message will appear in the top of the screen either confirming that selected users were enrolled in the selected course or providing reasons why they were unable to be enrolled.

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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
☐	testinsa	testinsa testinsa	testinsa
☐	testinsb	testinsb testinsb	testinsb
☐	testinsc	testinsc testinsc	testinsc
☐	testinsd	testinsd testinsd	testinsd
☐	testinse	testinse testinse	testinse
☐	testinsf	testinsf testinsf	testinsf
☐	testinsg	testinsg testinsg	testinsg
☐	testinsh	testinsh testinsh	testinsh
☐	testinsi	testinsi testinsi	testinsi
☐	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 ▴
☐	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	testinse testinse	testinse	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	testmgrh testmgrh	testmgrh	SEH TEST SCORM – EB

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

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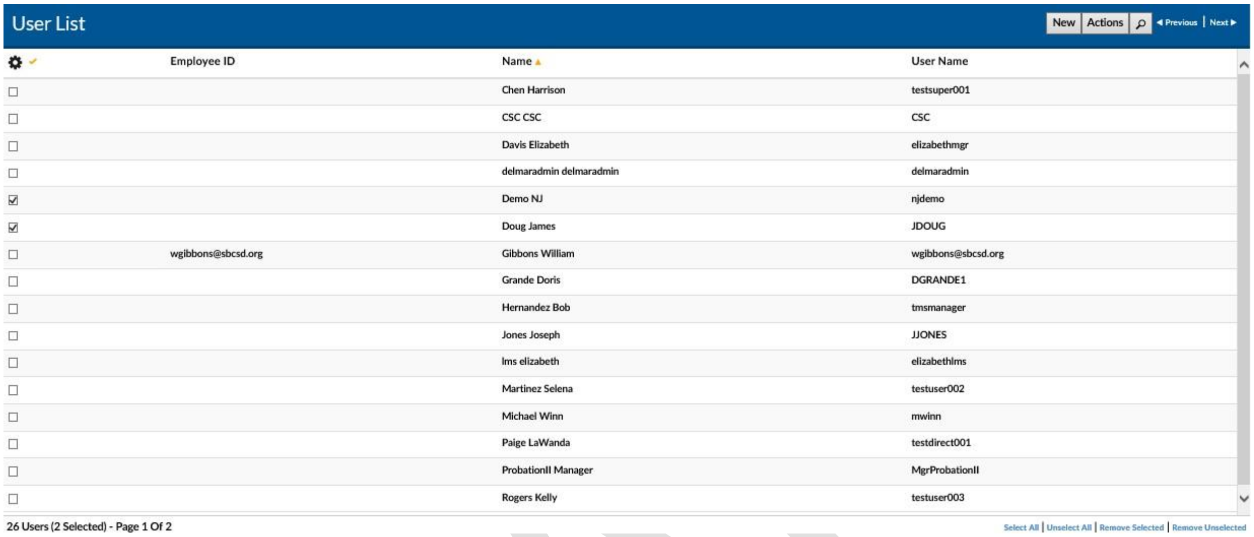
Overview Tab – User List View

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

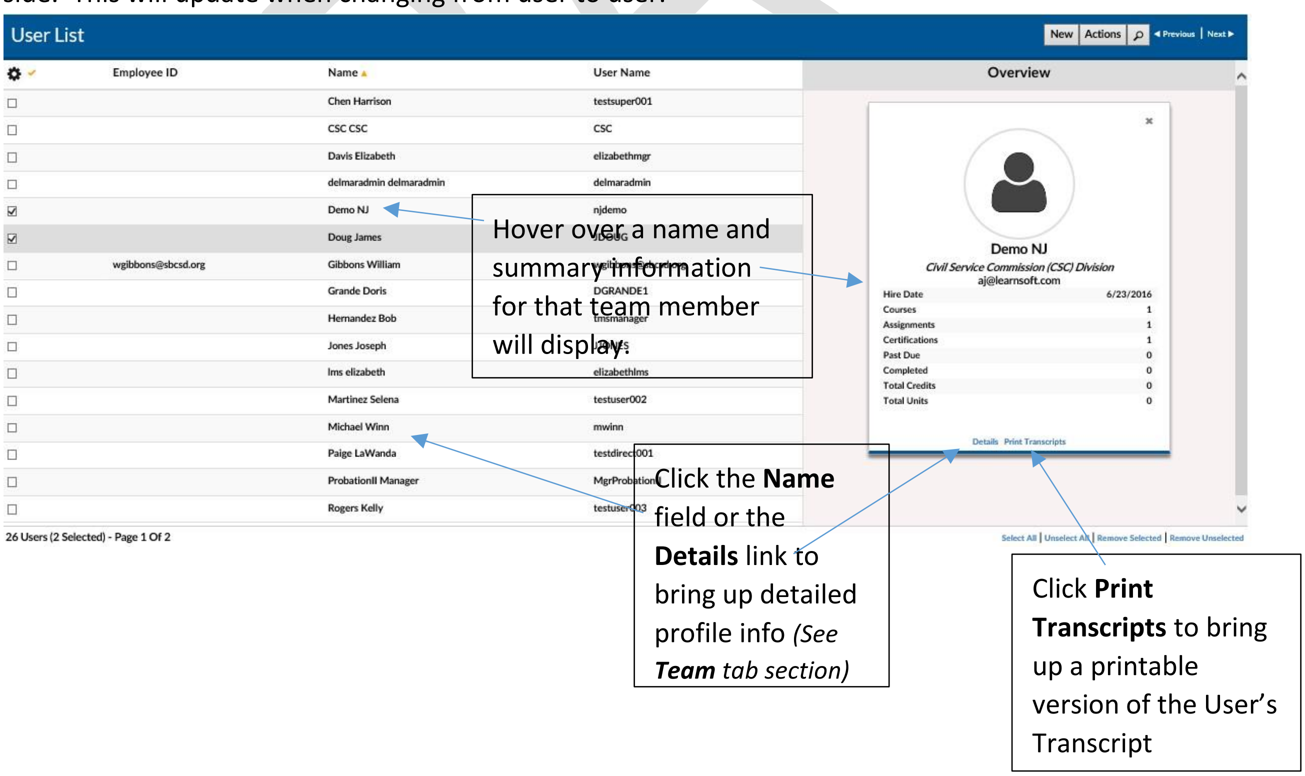
New | Actions | Previous | Next

	Employee ID	Name	User Name
☐		Chen Harrison	testsuper001
☐		CSC CSC	CSC
☐		Davis Elizabeth	elizabethmgr
☐		delmaradmin delmaradmin	delmaradmin
☑		Demo NJ	njdemo
☑		Doug James	JDOUG
☐	wgibbons@sbcsd.org	Gibbons William	wgibbons@sbcsd.org
☐		Grande Doris	DGRANDE1
☐		Hernandez Bob	tmsmanager
☐		Jones Joseph	JJONES
☐		lms elizabeth	elizabethlms
☐		Martinez Selena	testuser002
☐		Michael Winn	mwinn
☐		Paige LaWanda	testdirect001
☐		ProbationII Manager	MgrProbationII
☐		Rogers Kelly	testuser003

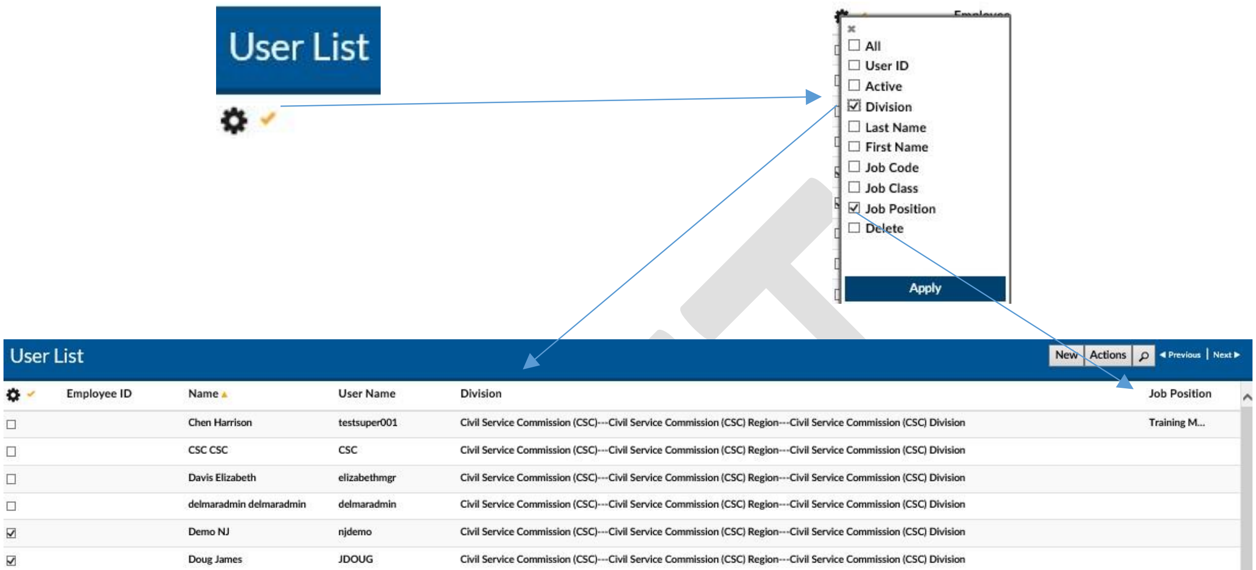
26 Users (2 Selected) - Page 1 Of 2

Select All | Unselect All | Remove Selected | Remove Unselected

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.



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.



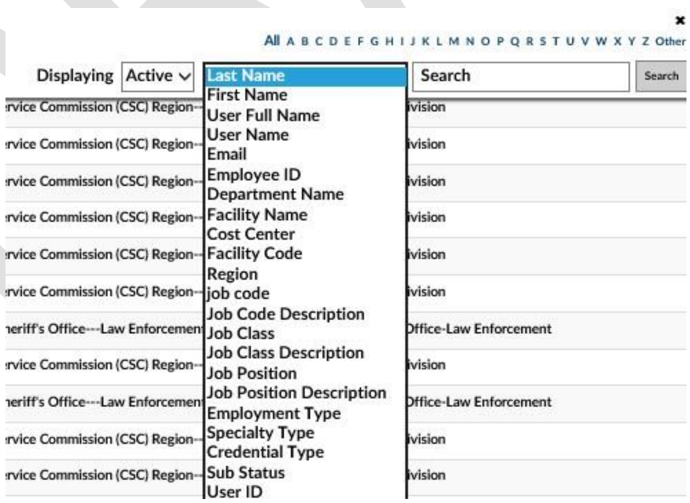
Sort by Column, by clicking on Column name (or up / down triangle if available). A single click sorts in ascending order. A second click sorts in descending order.

<table>
<tr><td>Sort by Name Column in ascending order</td><td>Sort by Name Column in descending order</td></tr>
<tr><td>
</td><td>
</td></tr>
</table>

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 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.



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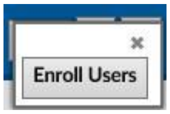
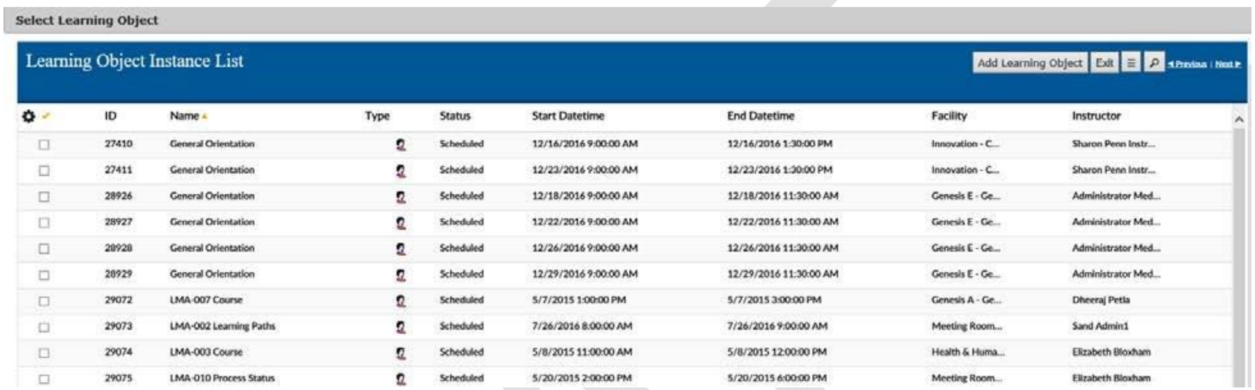
Enroll team members from the User List by first checking the box to the left of the team member names of those you wish to enroll then clicking on the Action button Actions in the top right corner of the **User List.**



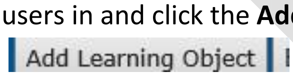
This will bring up the **Enroll Users** button. Click to launch the **Select Learning Object / Learning Object Instance List**.



	ID	Name	Type	Status	Start Datetime	End Datetime	Facility	Instructor
☐	27410	General Orientation		Scheduled	12/16/2016 9:00:00 AM	12/16/2016 1:30:00 PM	Innovation - C...	Sharon Penn Instr...
☐	27411	General Orientation		Scheduled	12/23/2016 9:00:00 AM	12/23/2016 1:30:00 PM	Innovation - C...	Sharon Penn Instr...
☐	28926	General Orientation		Scheduled	12/18/2016 9:00:00 AM	12/18/2016 11:30:00 AM	Genesis E - Ge...	Administrator Med...
☐	28927	General Orientation		Scheduled	12/22/2016 9:00:00 AM	12/22/2016 11:30:00 AM	Genesis E - Ge...	Administrator Med...
☐	28928	General Orientation		Scheduled	12/26/2016 9:00:00 AM	12/26/2016 11:30:00 AM	Genesis E - Ge...	Administrator Med...
☐	28929	General Orientation		Scheduled	12/29/2016 9:00:00 AM	12/29/2016 11:30:00 AM	Genesis E - Ge...	Administrator Med...
☐	29072	LMA-007 Course		Scheduled	5/7/2015 1:00:00 PM	5/7/2015 3:00:00 PM	Genesis A - Ge...	Dheeraj Petla
☐	29073	LMA-002 Learning Paths		Scheduled	7/26/2016 8:00:00 AM	7/26/2016 9:00:00 AM	Meeting Room...	Sand Admin1
☐	29074	LMA-003 Course		Scheduled	5/8/2015 11:00:00 AM	5/8/2015 12:00:00 PM	Health & Huma...	Elizabeth Bloxham
☐	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 learing 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.



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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.

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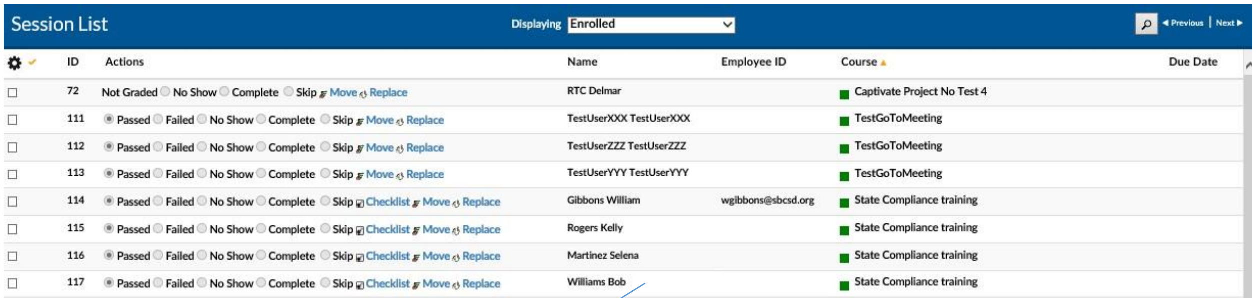
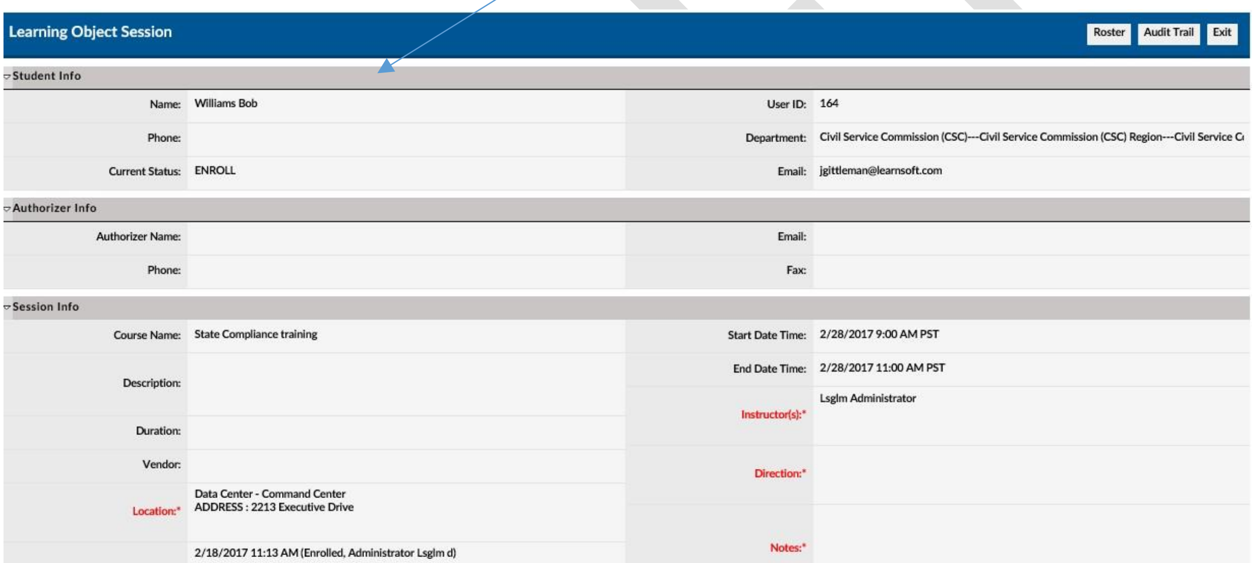
Overview – Session List View

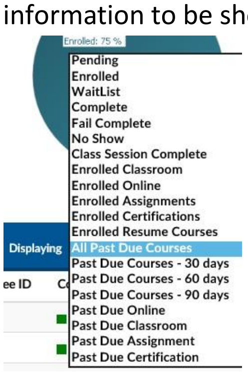
When selecting course related information from the **Overall Dashboard – Manager View Metrics** or the **Displaying** dropdown selector, the bottom section will show the **Session List**. This will show data related to user enrollment in specific course instances.



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



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



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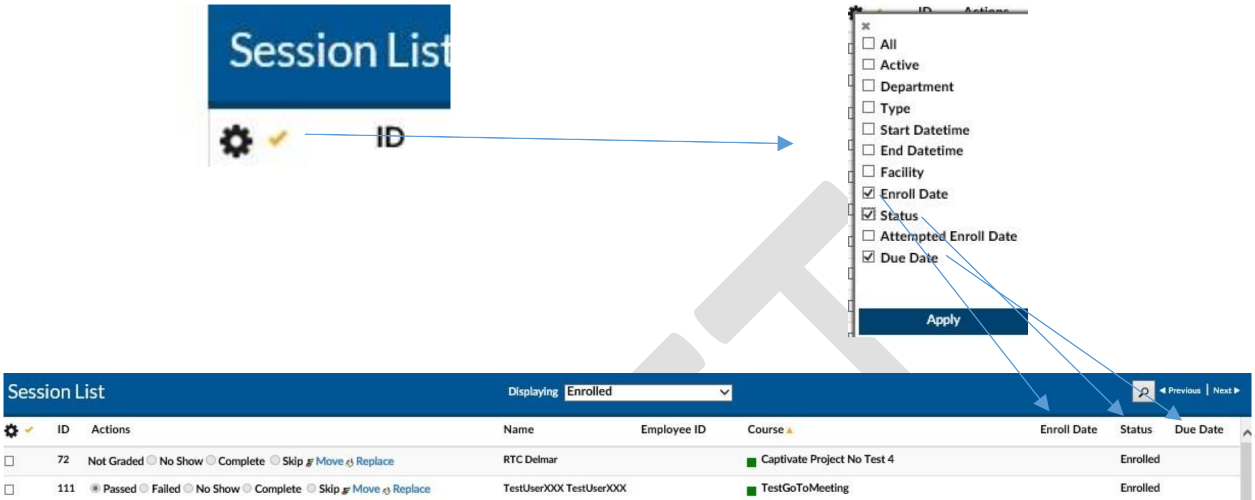
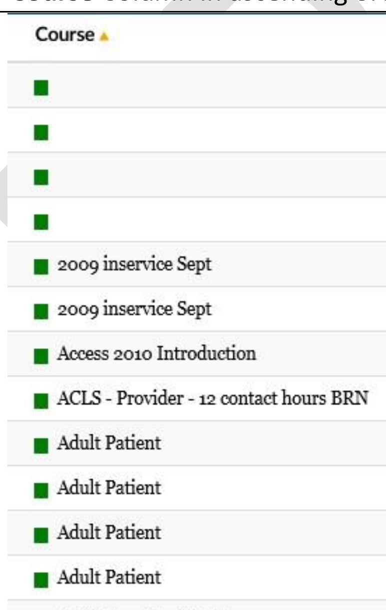
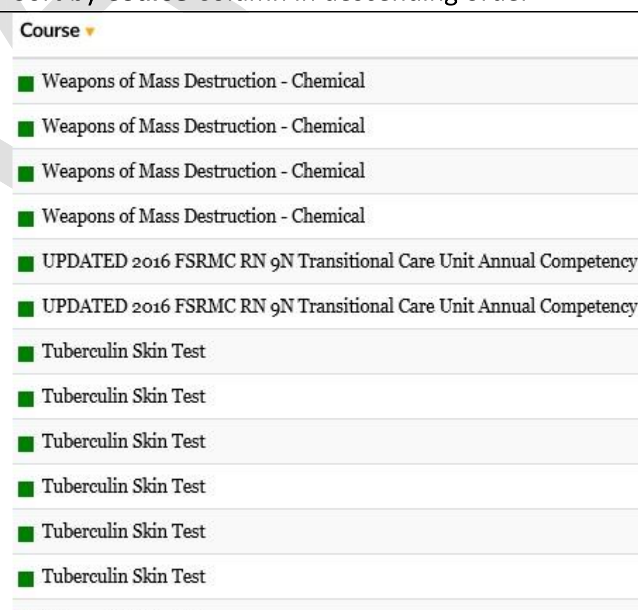
The **Session List** data view is configurable. To add desired column data, click on the **gear** icon. This will bring up a checkbox of columns that can be displayed in this particular section. Check the desired data columns and click **Apply**. The screen will refresh with the additional columns displayed.

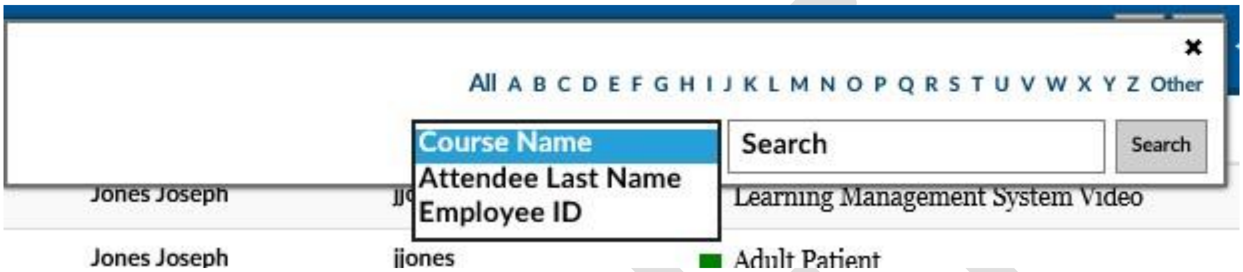


Sort by Column, by clicking on Column name (or up / down triangle if available). A single click sorts in ascending order. A second click sorts in descending order.

Sort by **Course** Column in ascending order	Sort by **Course** Column in descending order
	

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

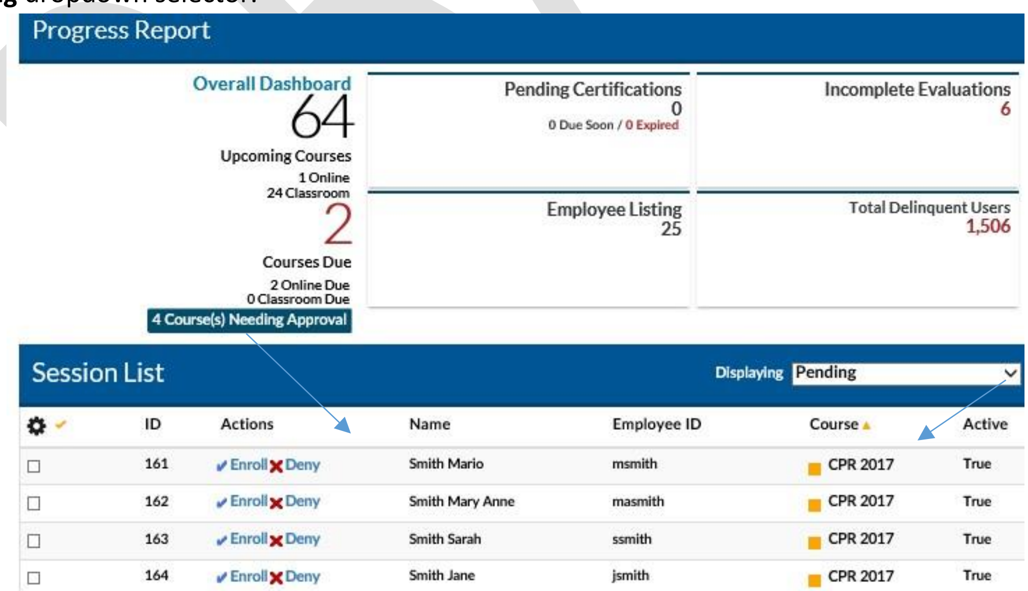
Use the letters for a quick Course filter. Use the in search drop down to select the variable to filter by, enter the keyword search in the Search free text box and click search.



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.



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

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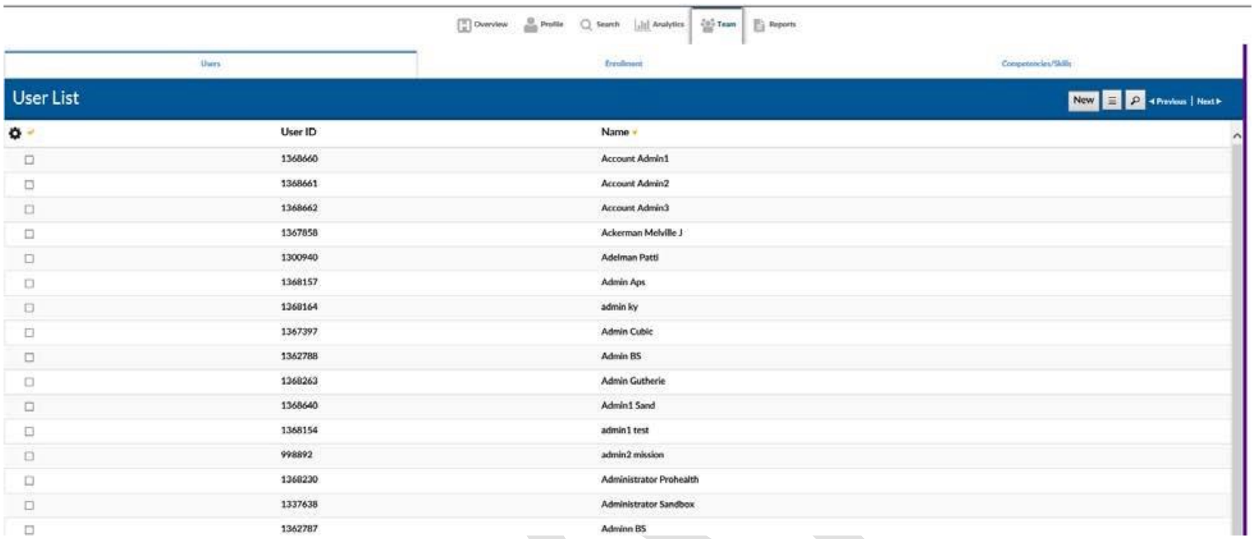
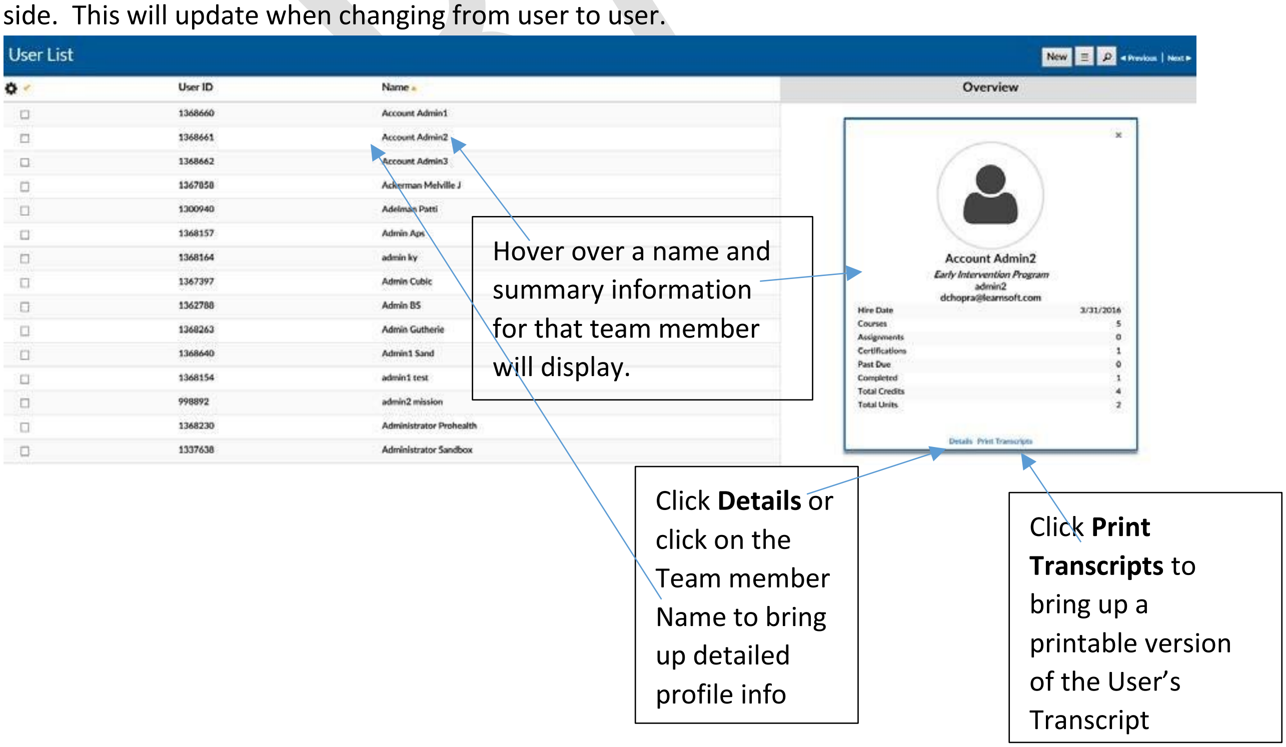
Team Tab

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).*

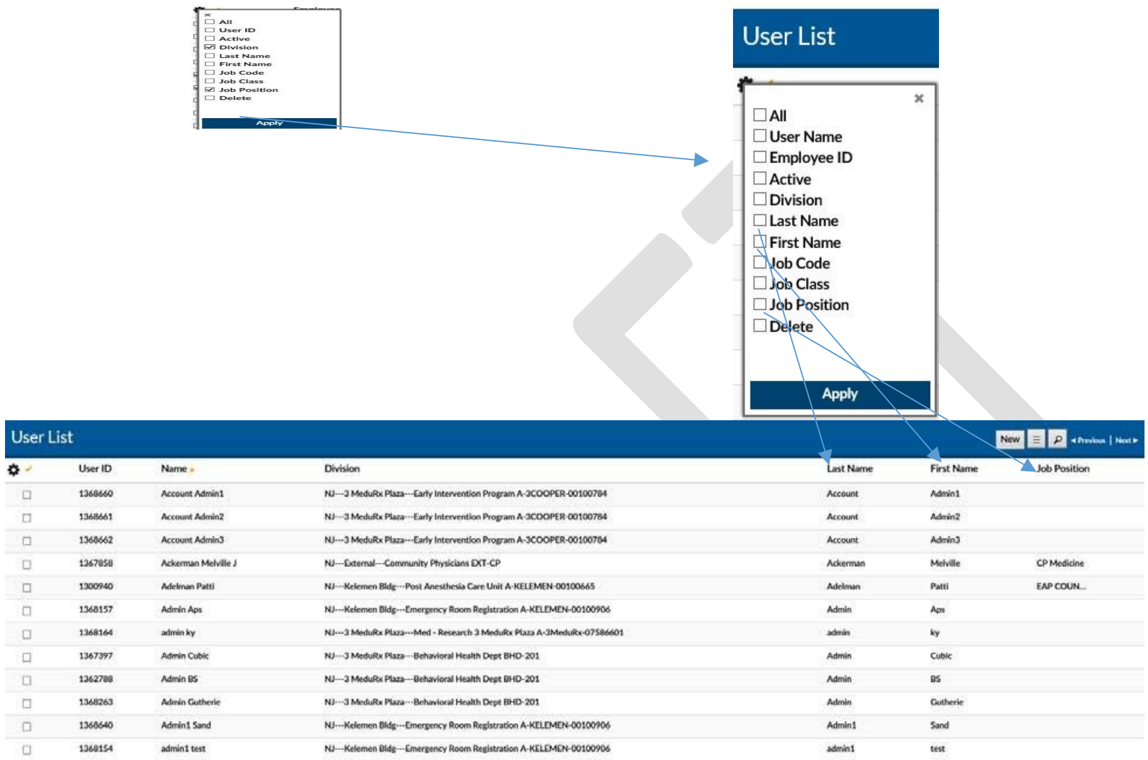
The default view is a listing of ***Users*** that make up your team as shown in the **User List**.



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.



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.

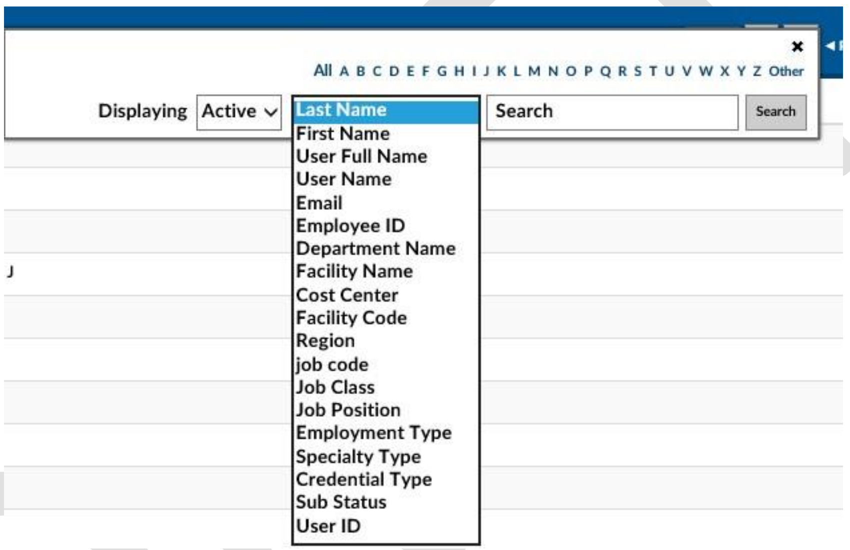


Sort by Column, by clicking on Column name (or up / down triangle if available). A single click sorts in ascending order. A second click sorts in descending order.

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

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

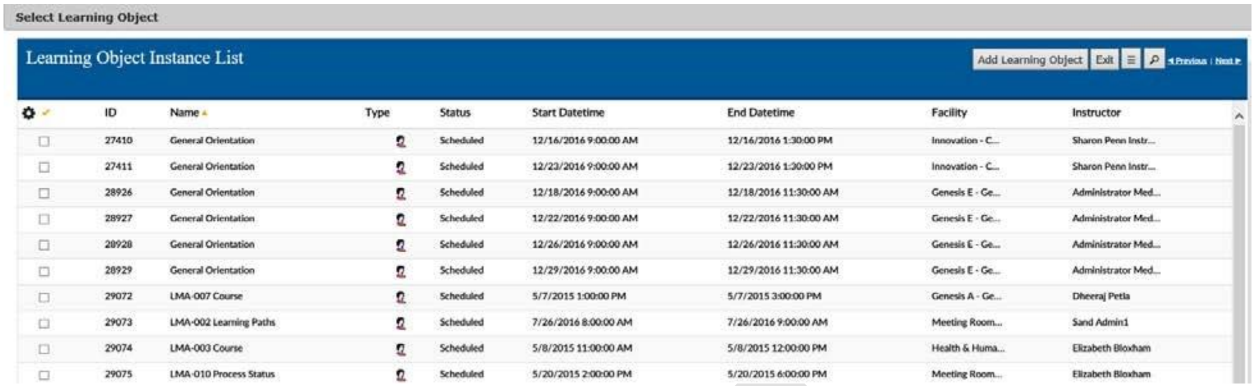
Use the letters for a quick Last Name filter. Use the in search drop down to select the variable to filter by, enter the keyword search in the Search free text box and click search.



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** button 

. Click to launch the **Select Learning Object / Learning Object Instance List**.

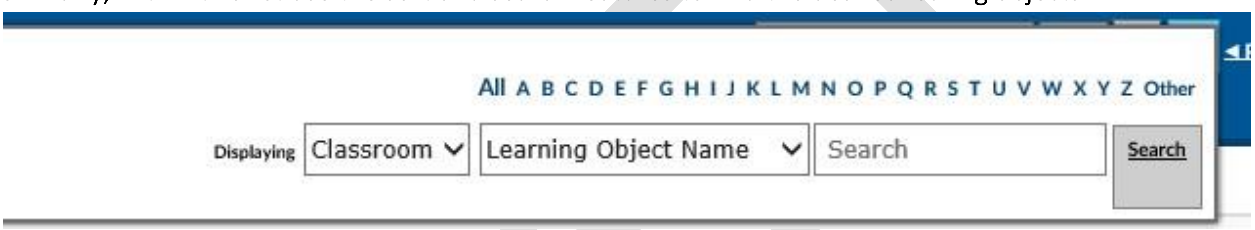


Select Learning Object

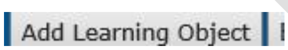
Learning Object Instance List

	ID	Name	Type	Status	Start Datetime	End Datetime	Facility	Instructor
☐	27410	General Orientation		Scheduled	12/16/2016 9:00:00 AM	12/16/2016 1:30:00 PM	Innovation - C...	Sharon Penn Instr...
☐	27411	General Orientation		Scheduled	12/23/2016 9:00:00 AM	12/23/2016 1:30:00 PM	Innovation - C...	Sharon Penn Instr...
☐	28926	General Orientation		Scheduled	12/18/2016 9:00:00 AM	12/18/2016 11:30:00 AM	Genesis E - Ge...	Administrator Med...
☐	28927	General Orientation		Scheduled	12/22/2016 9:00:00 AM	12/22/2016 11:30:00 AM	Genesis E - Ge...	Administrator Med...
☐	28928	General Orientation		Scheduled	12/26/2016 9:00:00 AM	12/26/2016 11:30:00 AM	Genesis E - Ge...	Administrator Med...
☐	28929	General Orientation		Scheduled	12/29/2016 9:00:00 AM	12/29/2016 11:30:00 AM	Genesis E - Ge...	Administrator Med...
☐	29072	LMA-007 Course		Scheduled	5/7/2015 1:00:00 PM	5/7/2015 3:00:00 PM	Genesis A - Ge...	Dheeraj Petla
☐	29073	LMA-002 Learning Paths		Scheduled	7/26/2016 8:00:00 AM	7/26/2016 9:00:00 AM	Meeting Room...	Sand Admin1
☐	29074	LMA-003 Course		Scheduled	5/8/2015 11:00:00 AM	5/8/2015 12:00:00 PM	Health & Huma...	Elizabeth Bloxham
☐	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 learing 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.



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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.

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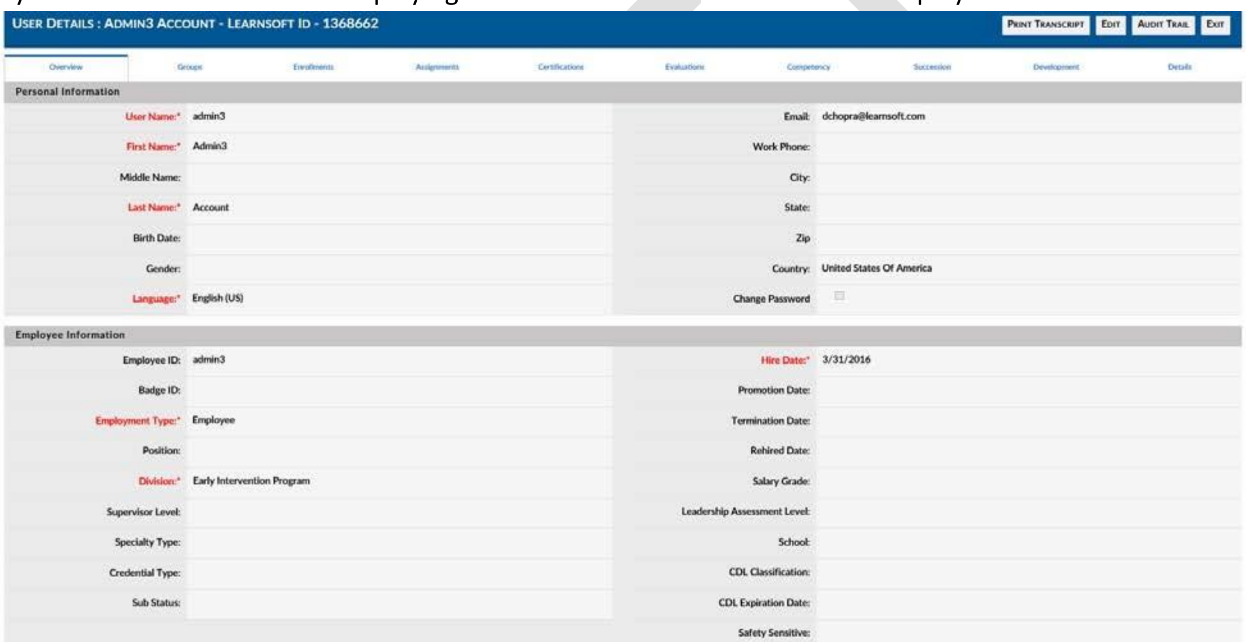
Team Tab – Team Member Profile (User Details)

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.

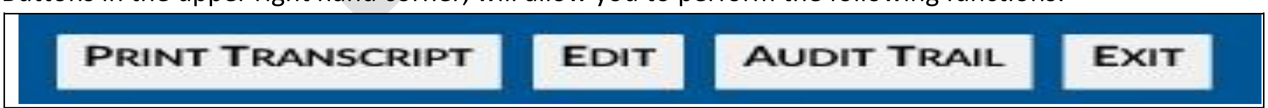
Team Tab – Team Member Profile – Overview Tab

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



Team Tab – Team Member Profile – Buttons

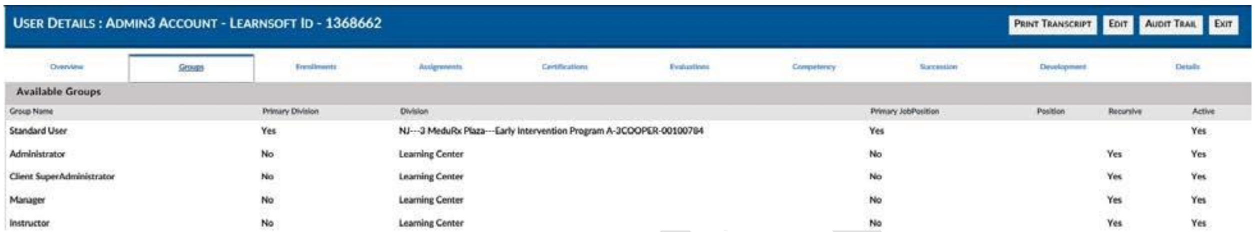
Buttons in the upper right hand corner, will allow you to perform the following functions:



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.

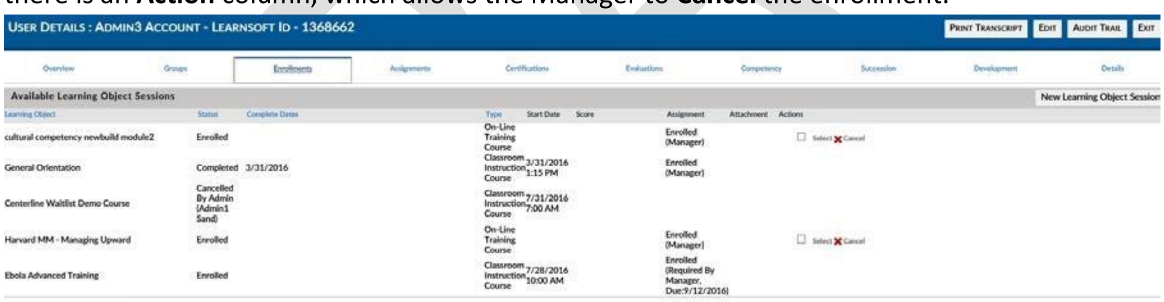
Team Tab – Team Member Profile – Groups Tab

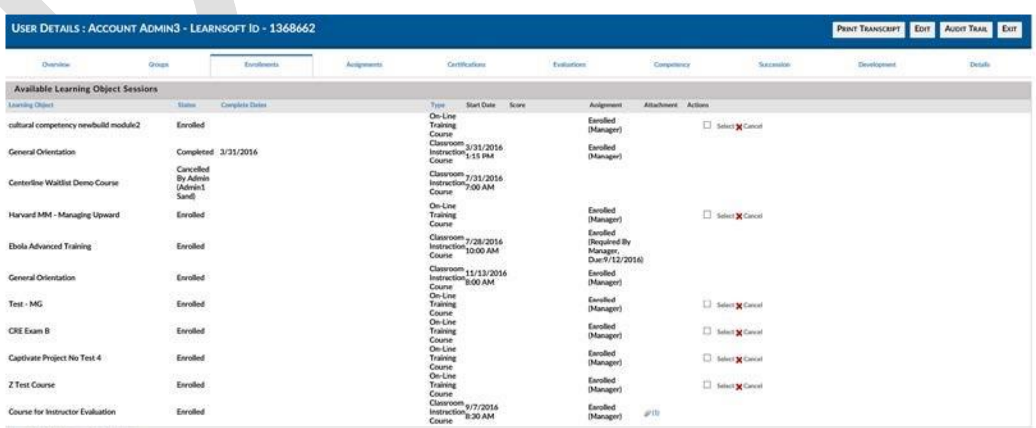
The Profile - **Groups** tab provides a listing of the LMS-specific groups which a team member is or has been a member. It also indicates which **Division** to which the role is associated. The **Active** column indicates if the association is still active and the **Primary Position** column will indicate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



Team Tab – Team Member Profile – Enrollments Tab

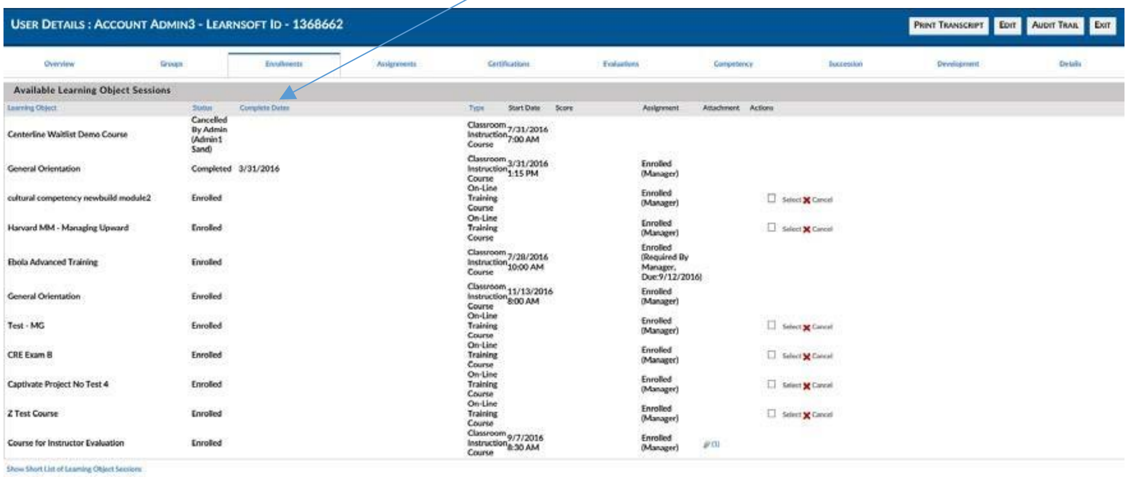
The Profile - **Enrollments** tab provides a listing of all the courses which the team member has been enrolled in. It allows the Manager to search user learning records to ensure they have completed required courses. The columns list the **Learning Object** (course name), Enrollment **Status**, **Completion 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.



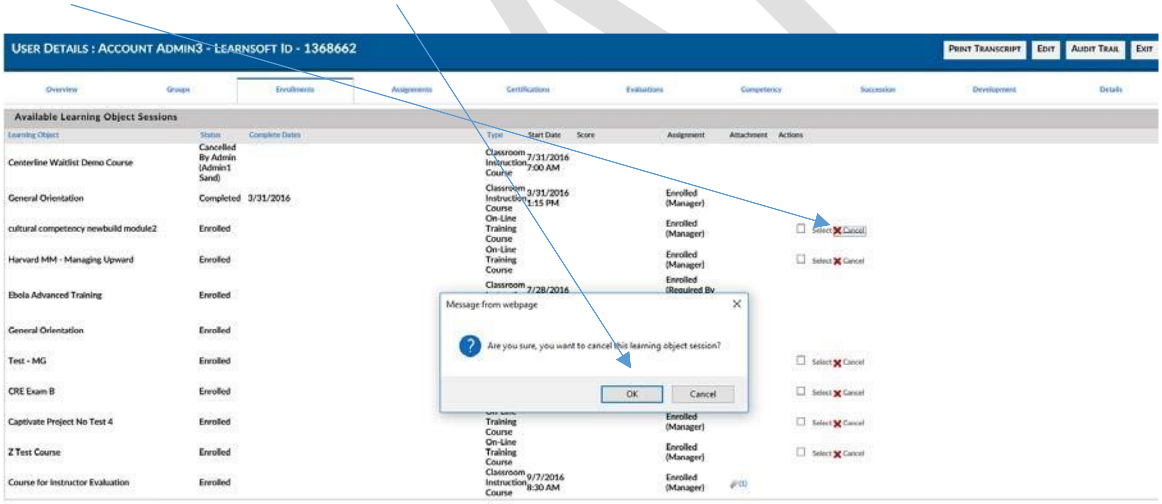


A subset of course is shown by default. Click the *Show More Learning Object Sessions* link to expand the page and show all the Learning Object Sessions.

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



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



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.

Team Tab – Team Member Profile – Certifications Tab

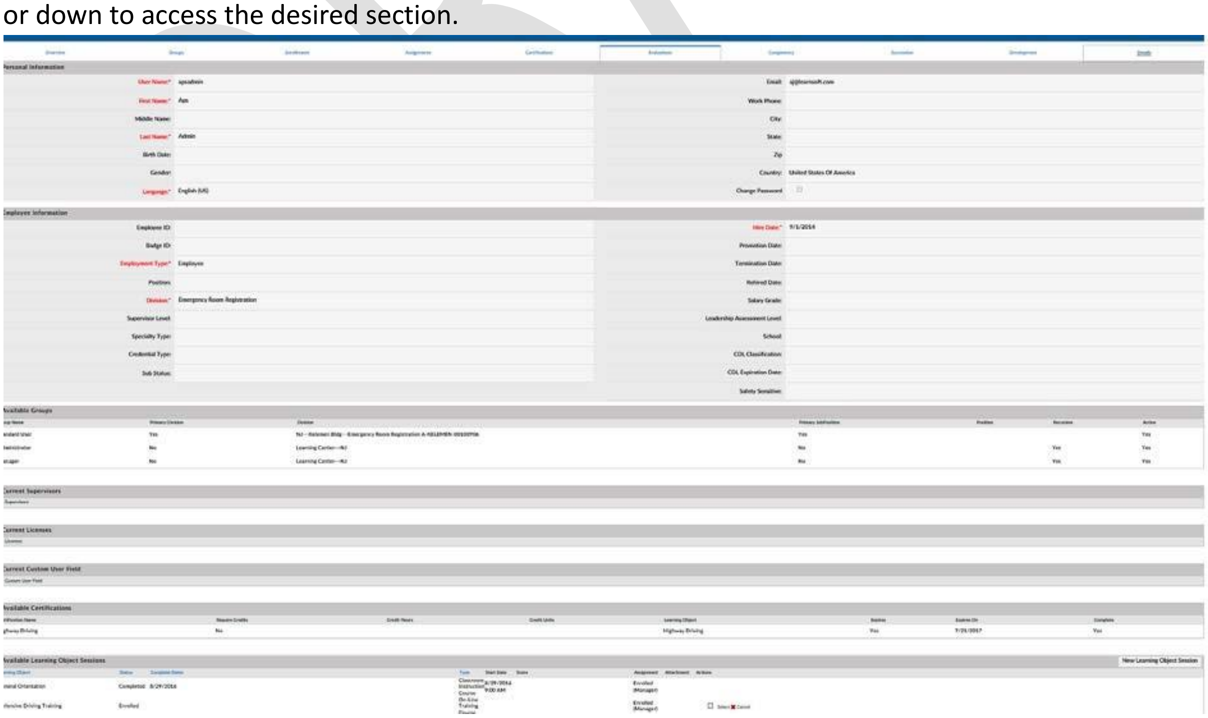
Click the Profile - **Certifications** tab to see a listing of all the team member's Certifications. Note, these are LMS-based certifications, which may differ from external certifications or licenses *(If the latter info is passed from the HRIS system, it can be seen in the Current Licenses subsection 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.

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

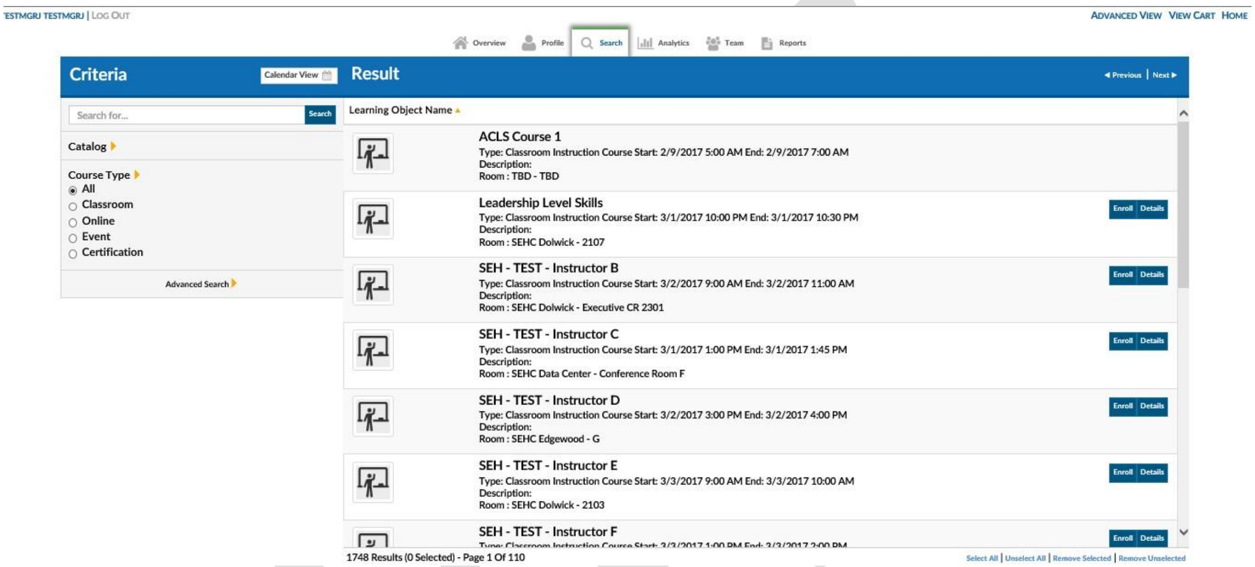
The Profile - **Details** tab provides a single page, scrollable version of all the other tabs. Simply scroll up or down to access the desired section.



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



Learnsoft

Search – Predictive and Keyword search

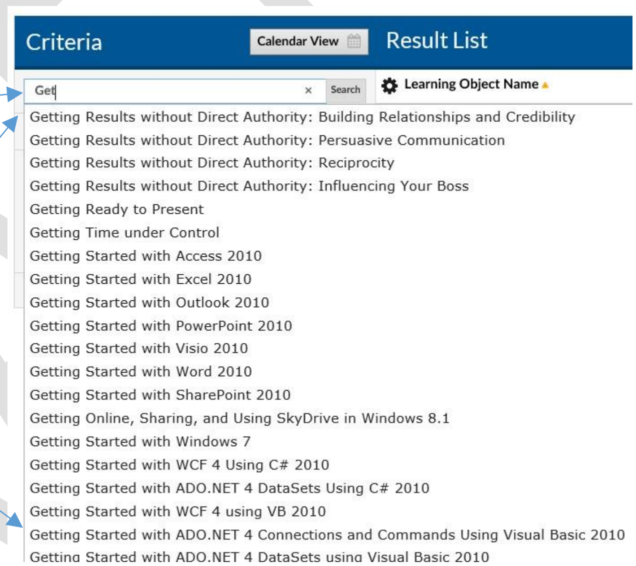
Free Text Field allows you to enter keywords

Select Course Type to narrow results.

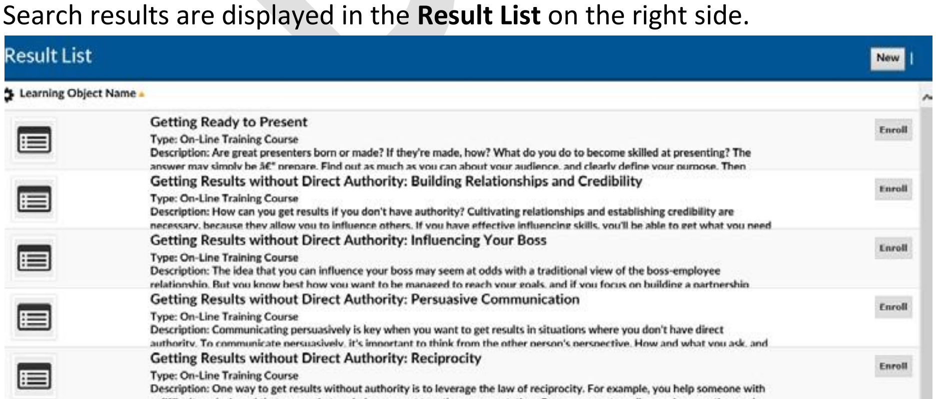
Click the Search button when ready to search

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).

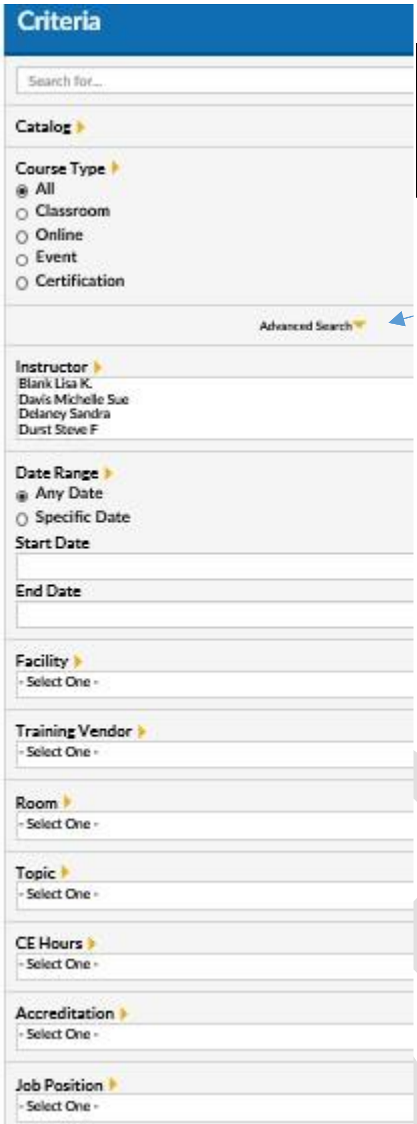


Search results are displayed in the **Result List** on the right side.



Learnsoft

Search – Advanced search



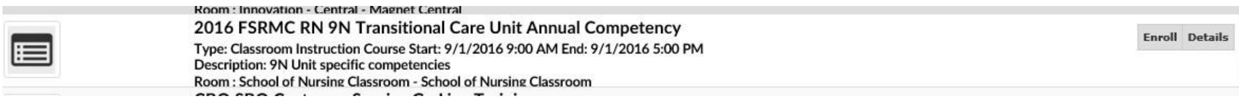
Click Advanced Search Arrow to open Advanced Search Menu allowing refined course lookup.

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.

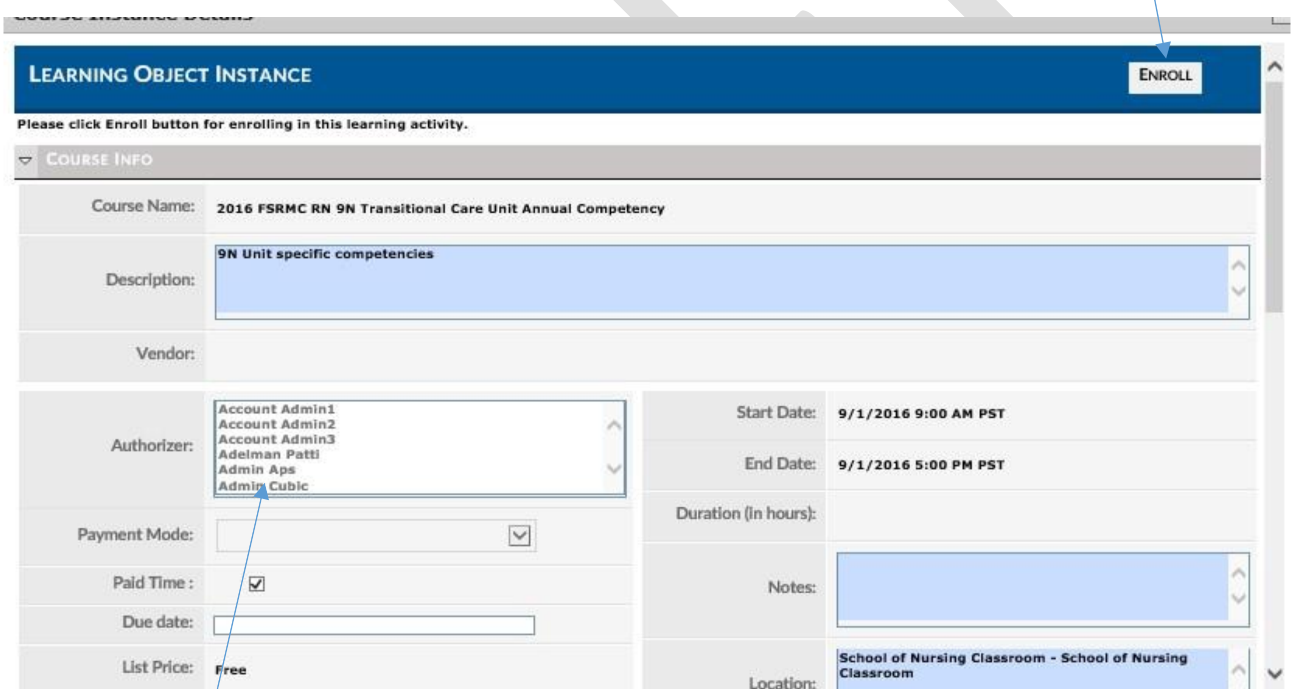
Search – Detailed Info & (Manager) Enroll Team

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



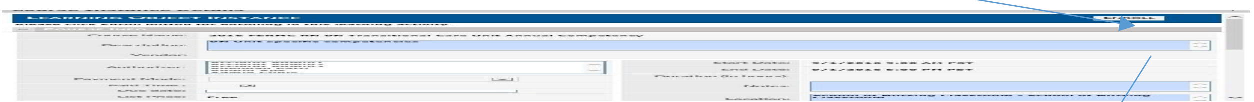
This will bring up the Course Info Page which provides detailed information which may include Course Name, Description, Start and End Dates, Authorizer, Payment and Instructor Information, Location, Directions and even a Course Outline.

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

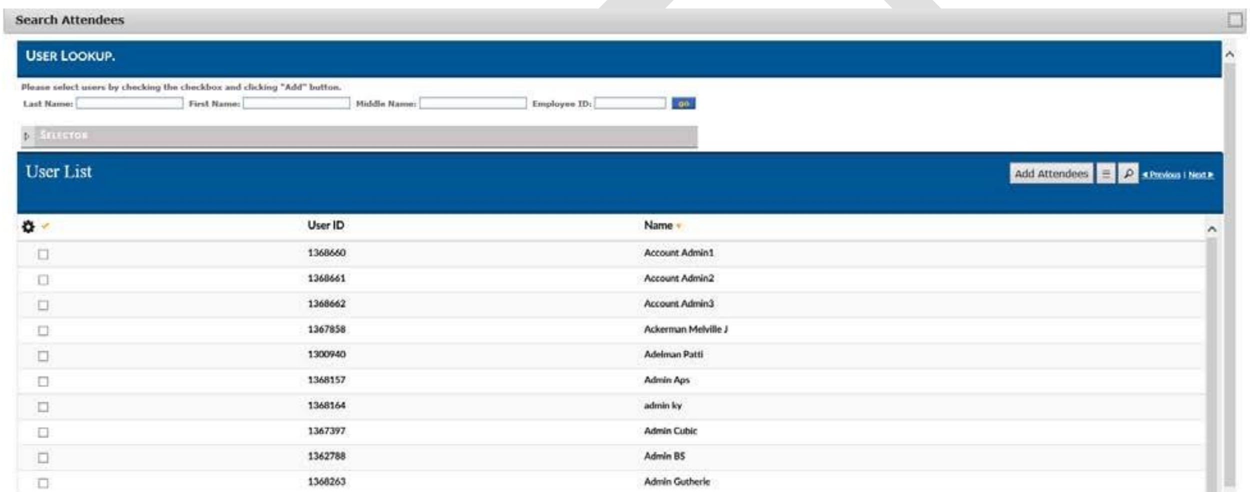


If additional Authorization is required, select an Authorizer from this list.

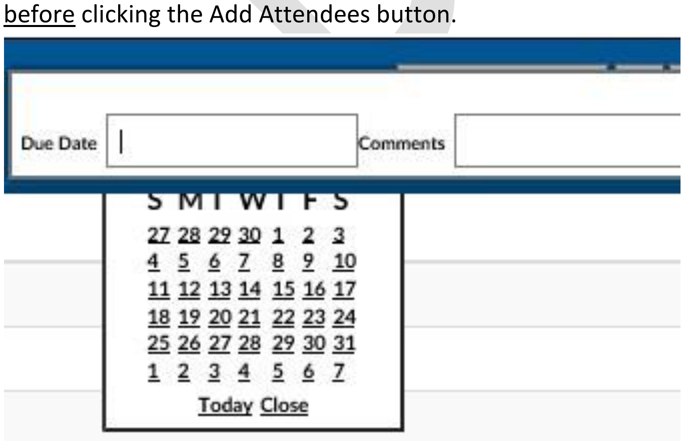
To Enroll your Team Members, click the **Enroll** button to the right of the row of the desired course.



This will bring up the **User Lookup / User List** which will allow you to search your team and select the team members to enroll (see prior sections regarding searching, filtering and sorting). Once team members have been identified, simply click on the checkbox to the left of the row with their name and click the **Add Attendees** button



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 <u>before</u> clicking the Add Attendees button.

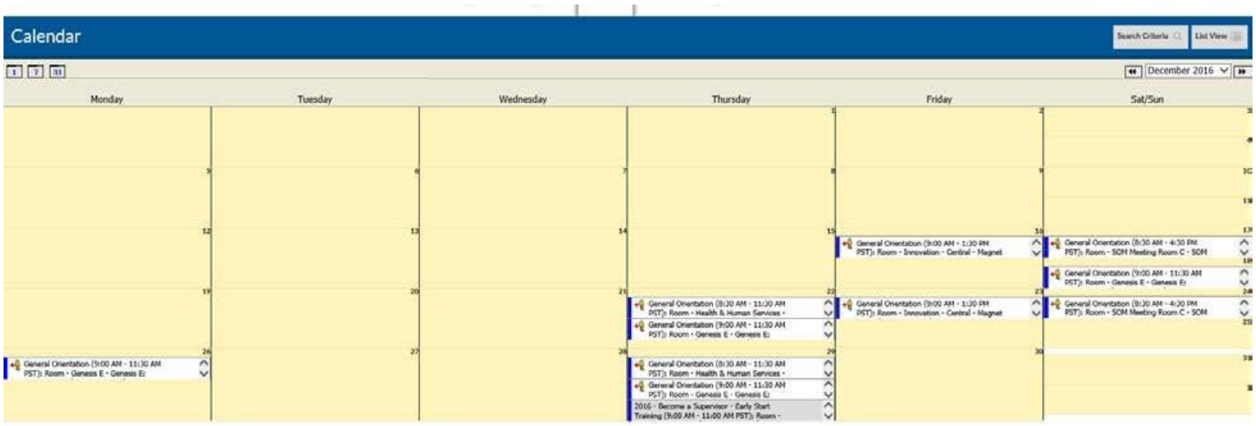


Learnsoft

Search – Calendar Lookup & (Manager) Enroll Team

Click the 

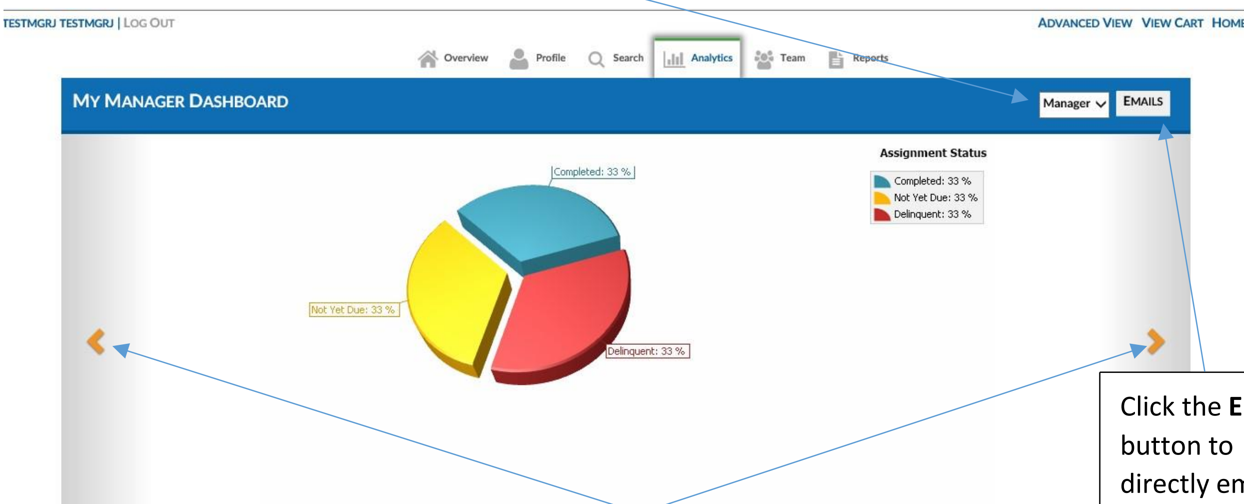
button to view upcoming classroom-based classes in a calendar format.



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***.



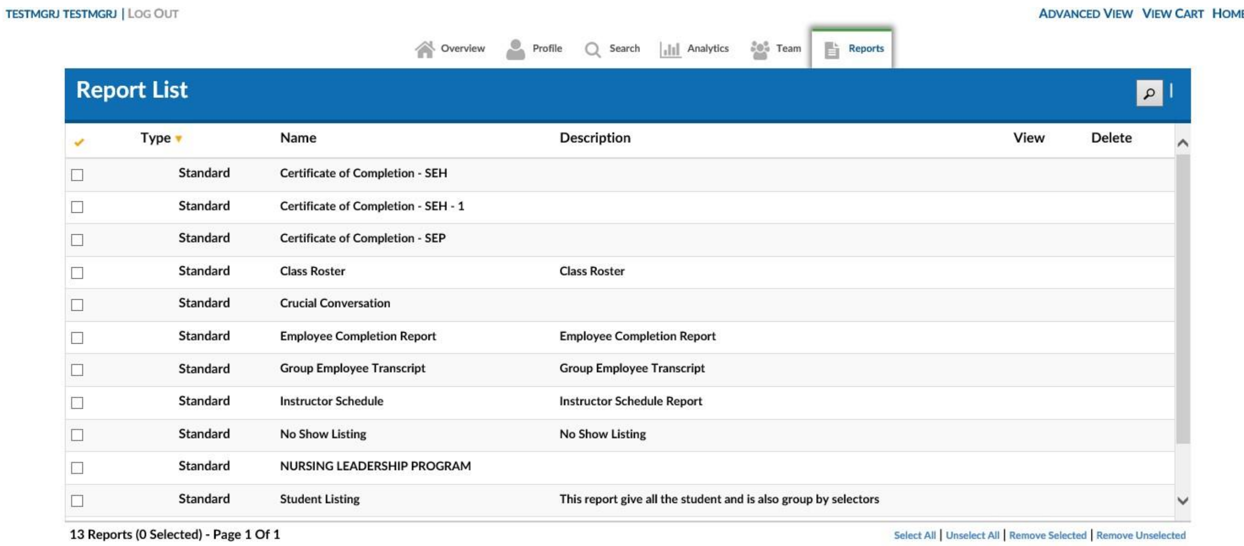
Use the arrows to navigate to previous / next Analytics graphic.

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.*



	Type	Name	Description	View	Delete
☐	Standard	Certificate of Completion - SEH			
☐	Standard	Certificate of Completion - SEH - 1			
☐	Standard	Certificate of Completion - SEP			
☐	Standard	Class Roster	Class Roster		
☐	Standard	Crucial Conversation			
☐	Standard	Employee Completion Report	Employee Completion Report		
☐	Standard	Group Employee Transcript	Group Employee Transcript		
☐	Standard	Instructor Schedule	Instructor Schedule Report		
☐	Standard	No Show Listing	No Show Listing		
☐	Standard	NURSING LEADERSHIP PROGRAM			
☐	Standard	Student Listing	This report give all the student and is also group by selectors		

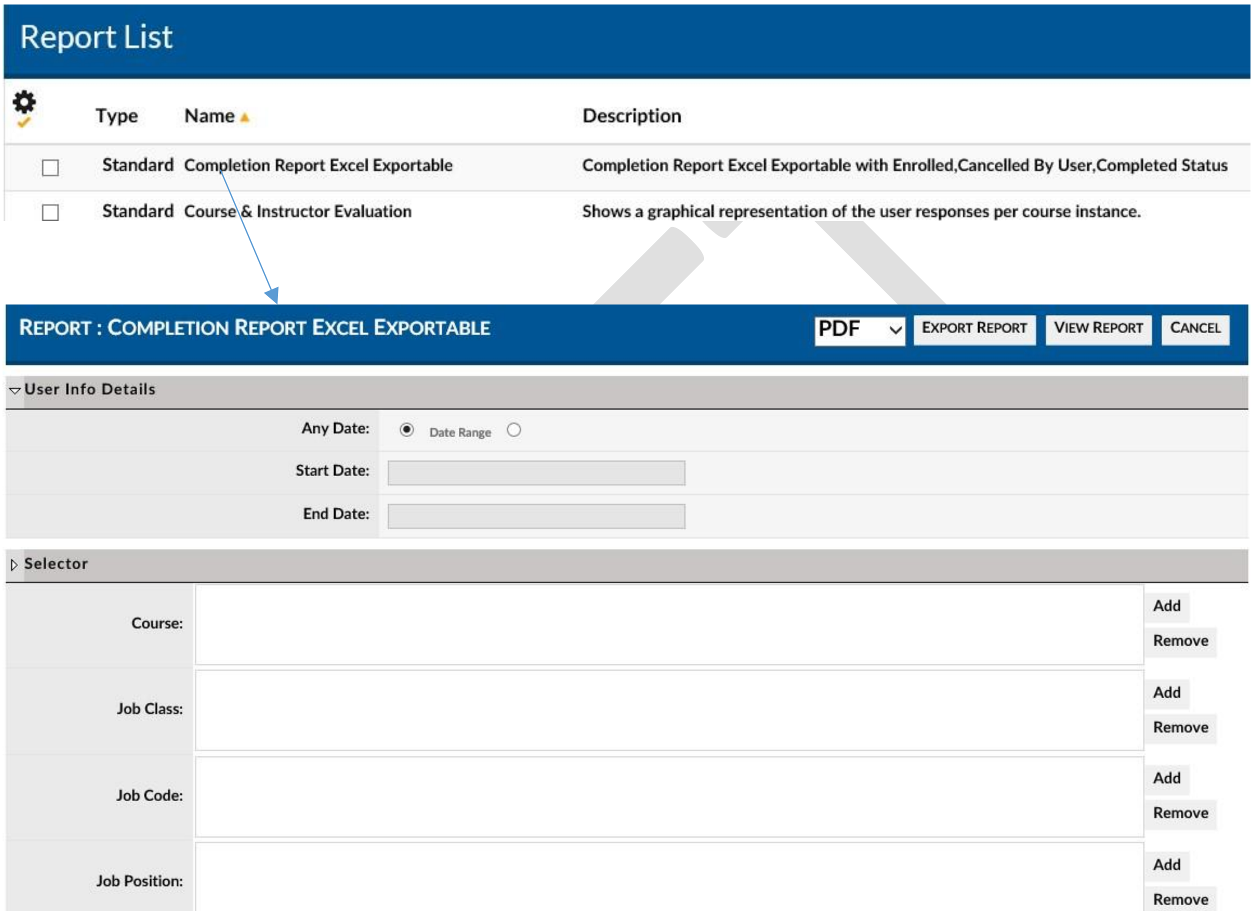
13 Reports (0 Selected) - Page 1 Of 1 Select All | Unselect All | Remove Selected | Remove Unselected

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.

Learnsoft

Reports – Selecting Data (Details, Filters / Selectors)

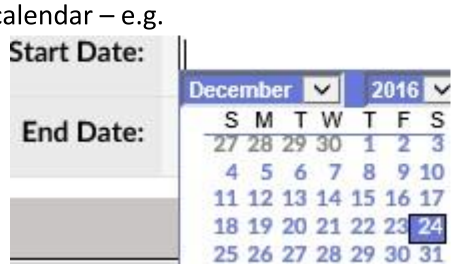
Click on the Report Name (or anywhere in the report row) to bring up the Report Page for the selected Report.



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. 

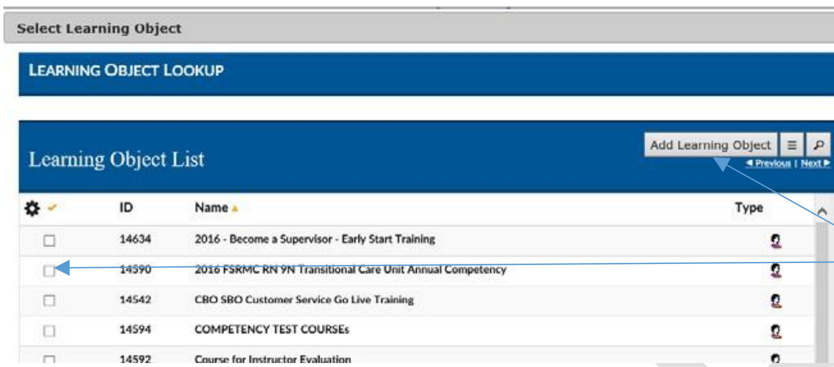
Date filters will generally allow free text date entry (mm/dd/yyyy) or allow selection from a popup calendar – e.g.



Learnsoft

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.



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

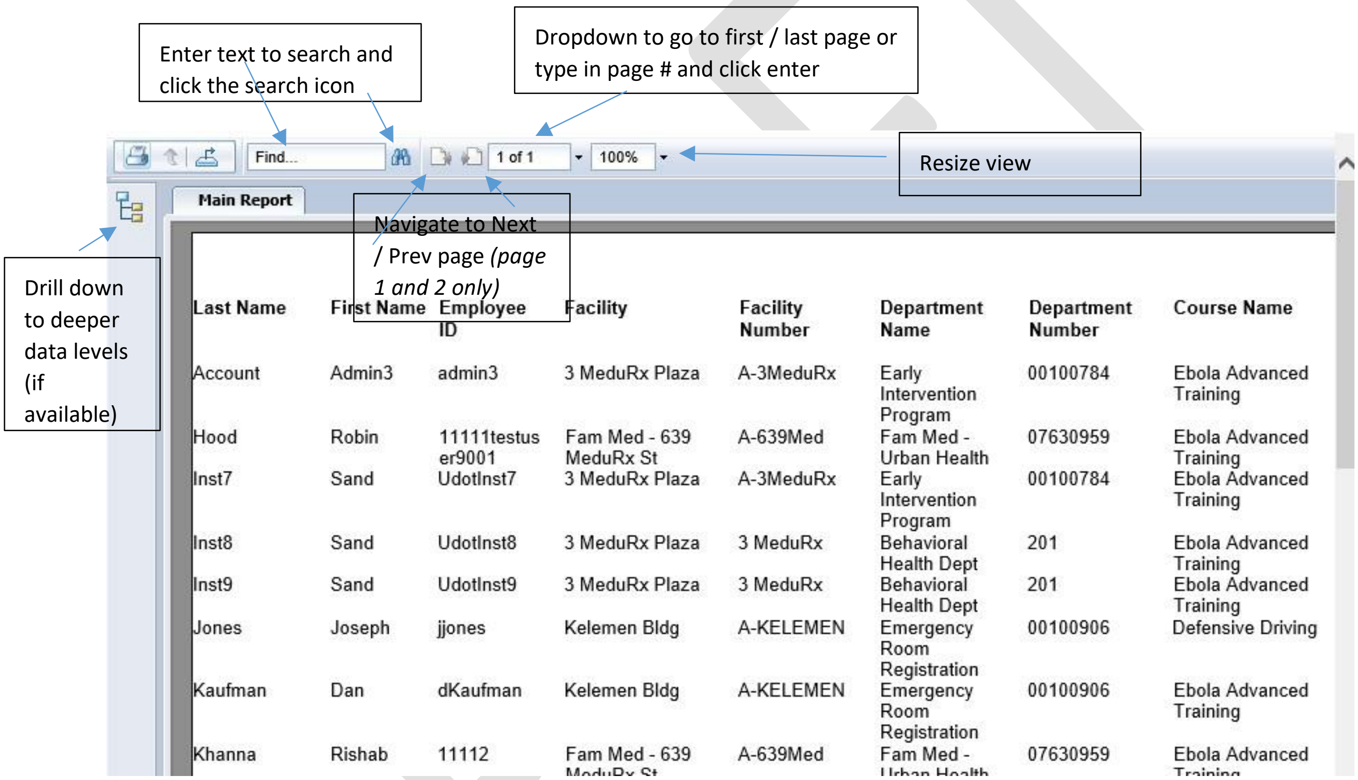
The lookup list will close and the selected options will now be listed within lookup filter / selector text box.

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

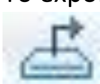
After entering any user data and using filters / selectors to narrow down report to the desired data, the Manager can click to **Export Report** (in either PDF or Excel versions), **View Report** (which also allows for printing and to export in additional formats) or **Cancel** and return to the Report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

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

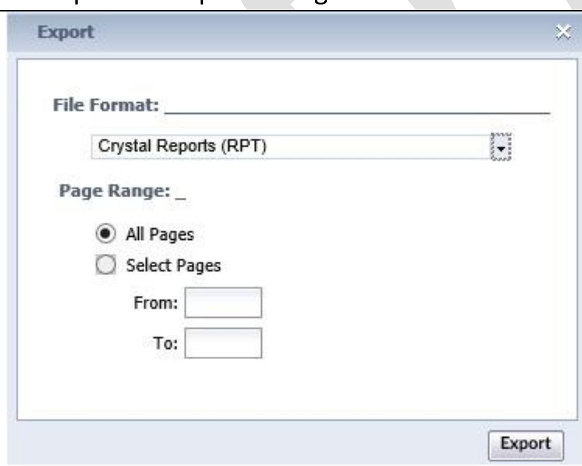


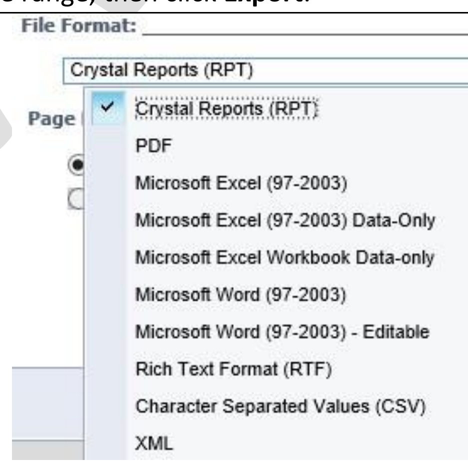
Click the **Print** icon to Print the Report to a PDF where it can be sent to your printer. Select pages and click the **Export** button.

To export, click the **Export** icon…

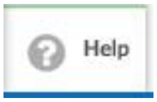


…to open the Export dialog. Select a file format and page range, then click **Export**.

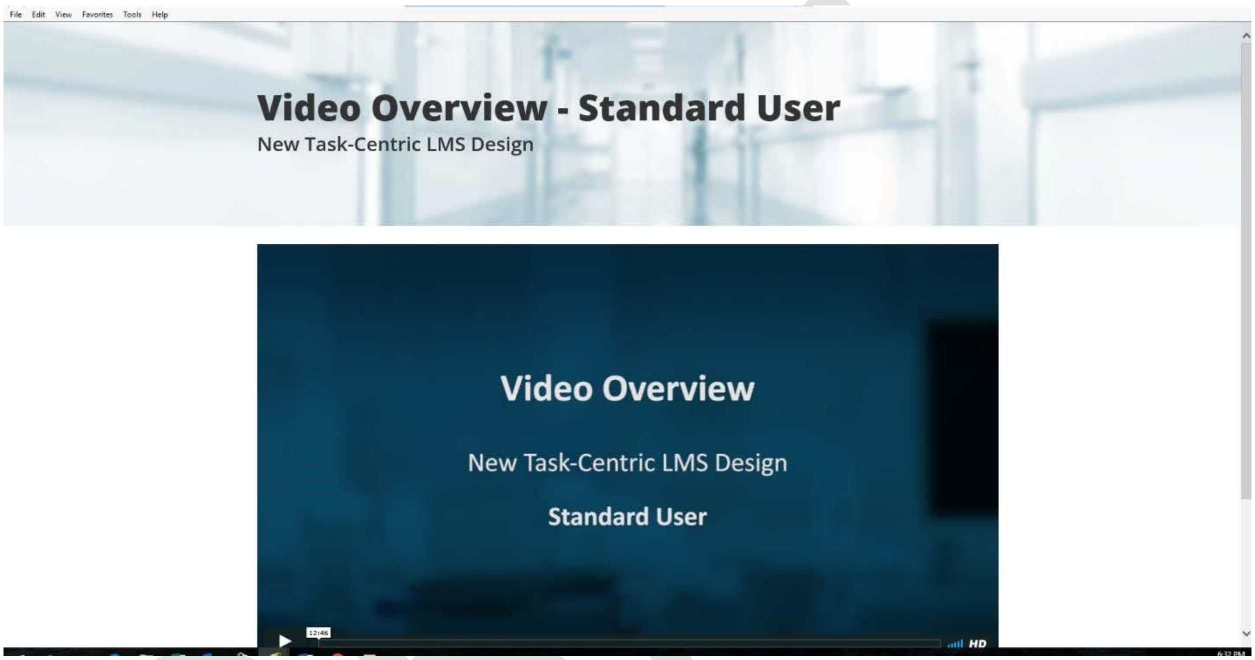




Help Tab



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.