



Learning Management System (“LMS”)

User Manual: Manager

V NLFMG-03092017-1

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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.

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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 the Status Icon displays a Green Thumbs Up, then items are up-to-date.	If the 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.
 You are up to date!	 Some items need your attention! Click here to display overdue items

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

Incomplete Evaluations

6

Employee Listing

25

Total Delinquent Users

1,506



Some items need your attention!

[Click here to display overdue items](#)

Session List

Displaying **All Past Due Courses**

Actions	ID	Name	Employee ID	Course
<input type="checkbox"/>	225	Not Graded <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="checkbox"/> Move <input type="checkbox"/> Replace	Jones Joseph	Administrator Essential Functions - Banking
<input type="checkbox"/>	239	Not Graded <input type="radio"/> No Show <input type="radio"/> Complete <input type="radio"/> Skip <input type="checkbox"/> Move <input type="checkbox"/> Replace	Jones Joseph	DHS Training

February 2017

«	«	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				

Click text link below hand icon to display overdue items in 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.

The screenshot shows the Learnsoft Overall Dashboard. The top section displays Manager Metrics: 216 Upcoming Courses (with 91 Online circled in red), Pending Certifications (0 Due Soon / 0 Expired), Incomplete Evaluations (5), and Employee Listing (90). A large green thumbs-up icon with the text "You are up to date!" is prominently displayed. To the right is a calendar for March 2017. The bottom section, titled "Session List", shows a table of 91 upcoming sessions, each with a status indicator (Passed, Failed, etc.) and an "Actions" column. The table includes columns for ID, Name, Employee ID, and Course.

ID	Name	Employee ID	Course
580766	testinsf	testinsf	SEH TEST SCORM - EB
580787	testinse	testinse	SEH TEST SCORM - EB
580788	testinsd	testinsd	SEH TEST SCORM - EB
580789	testinsc	testinsc	SEH TEST SCORM - EB
580790	testinsb	testinsb	SEH TEST SCORM - EB
580792	testmrf	testmrf	SEH TEST SCORM - EB
580794	testmre	testmre	SEH TEST SCORM - EB
580795	testmrgd	testmrgd	SEH TEST SCORM - EB
580796	testmrc	testmrc	SEH TEST SCORM - EB
580797	testmrb	testmrb	SEH TEST SCORM - FR

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Manager Metrics - Definitions

<p>64 Upcoming Courses 1 Online 24 Classroom</p>	<p>Upcoming Course – A count of both Online and Classroom courses for which your team members have 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"> • Online – A count of assigned / enrolled online courses only • Classroom - A count of assigned / enrolled Classroom courses only
<p>2 Courses Due 2 Online Due 0 Classroom Due</p>	<p>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.</p> <ul style="list-style-type: none"> • Online – A count of your team's online overdue courses only • Classroom - A count of your team's Classroom overdue courses only
<p>Pending Certifications 0 0 Due Soon / 0 Expired</p>	<p>Pending Certifications – A count of certifications for which your team members have enrolled, but have not yet completed.</p> <ul style="list-style-type: none"> • 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
<p>Incomplete Evaluations 6</p>	<p>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.</p>
<p>Employee Listing 25</p>	<p>Employee Listing – A total count of your active team members in the LMS system</p>
<p>Total Delinquent Users 1,506</p>	<p>Total Delinquent Users – A count of team members who have overdue learning activities.</p>

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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																																																																		
<table border="1"><thead><tr><th>«</th><th>«</th><th colspan="5">February 2017</th><th>»</th><th>»</th></tr><tr><th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th><th></th><th></th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td></td></tr><tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td></td><td></td></tr><tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td></td><td></td></tr><tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td></td><td></td></tr><tr><td>26</td><td>27</td><td>28</td><td></td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table>							«	«	February 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										
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26	27	28																																																																							

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*).



Probation Training LVL 10
Monday, February 27, 2017 - 08:00 AM
Enroll

General Orientation
Monday, February 27, 2017 - 08:45 AM
Enroll

Leadership Training LVL 3
Monday, February 27, 2017 - 09:00 AM
Enroll

CPR 2017
Monday, February 27, 2017 - 01:00 PM
Enroll

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

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641. Selecting the Users from the bottom section User List...

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

Employee ID	Name	User N
Chen Harrison	CSC CSC	testsuper
Davis Elizabeth	delmaradmin delmaradmin	CSC
Demo NJ	delmaradmin	elizabethmgr
Doue James	njdemo	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			
	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 testing	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						
	ID	Actions	Displaying	Enrolled		
<input type="checkbox"/>	580786	<input checked="" type="radio"/> 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	testinsf testinsf	testinsf	SEH TEST SCORM - EB	
<input type="checkbox"/>	580787	<input checked="" type="radio"/> 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	testinse testinse	testinse	SEH TEST SCORM - EB	
<input type="checkbox"/>	580788	<input checked="" type="radio"/> 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	testinsd testinsd	testinsd	SEH TEST SCORM - EB	
<input type="checkbox"/>	580789	<input checked="" type="radio"/> 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	testinsc testinsc	testinsc	SEH TEST SCORM - EB	
<input type="checkbox"/>	580790	<input checked="" type="radio"/> 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	testinsb testinsb	testinsb	SEH TEST SCORM - EB	
<input type="checkbox"/>	580792	<input checked="" type="radio"/> 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	testmgf testmgf	testmgf	SEH TEST SCORM - EB	
<input type="checkbox"/>	580794	<input checked="" type="radio"/> 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	testmgre testmgre	testmgre	SEH TEST SCORM - EB	
<input type="checkbox"/>	580795	<input checked="" type="radio"/> 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	testmgd testmgd	testmgd	SEH TEST SCORM - EB	
<input type="checkbox"/>	580796	<input checked="" type="radio"/> 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	testmgc testmgc	testmgc	SEH TEST SCORM - EB	
<input type="checkbox"/>	580797	<input checked="" type="radio"/> 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	testmark testmark	testmark	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	
<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@sbcisd.org	Gibbons William	wgibbons@sbcisd.org	
<input type="checkbox"/>		Grande Doris	DGRANDE1	
<input type="checkbox"/>		Hernandez Bob	tmsmanager	
<input type="checkbox"/>		Jones Joseph	JJONES	
<input type="checkbox"/>		Ims elizabeth	elizabethlms	
<input type="checkbox"/>		Martinez Selena	testuser002	
<input type="checkbox"/>		Michael Winn	mwinn	
<input type="checkbox"/>		Paige LaWanda	testdirect001	
<input type="checkbox"/>		Probationll Manager	MgrProbationll	
<input type="checkbox"/>		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.

	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@sbcisd.org	Gibbons William	wgibbons@sbcisd.org	
<input type="checkbox"/>		Grande Doris	DGRANDE1	
<input type="checkbox"/>		Hernandez Bob	tmsmanager	
<input type="checkbox"/>		Jones Joseph	JJONES	
<input type="checkbox"/>		Ims elizabeth	elizabethlms	
<input type="checkbox"/>		Martinez Selena	testuser002	
<input type="checkbox"/>		Michael Winn	mwinn	
<input type="checkbox"/>		Paige LaWanda	testdirect001	
<input type="checkbox"/>		Probationll Manager	MgrProbationll	
<input type="checkbox"/>		Rogers Kelly	testuser003	

26 Users (2 Selected) - Page 1 Of 2

[New](#) [Actions](#) [🔍](#) [◀ Previous](#) [Next ▶](#)

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

Overview



Demo NJ
Civil Service Commission (CSC) Division
aj@learnsoft.com

6/23/2016

Hire Date	6/23/2016
Courses	1
Assignments	1
Certifications	1
Past Due	0
Completed	0
Total Credits	0
Total Units	0

[Details](#) [Print Transcripts](#)

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

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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.

The diagram illustrates the configuration of the 'User List' data view. It starts with the 'User List' screen, which has a gear icon. A blue arrow points from this icon to a configuration dialog box. This dialog box lists various columns with checkboxes: 'All', 'User ID', 'Active', 'Division' (which is checked), 'Last Name', 'First Name', 'Job Code', 'Job Class', 'Job Position' (which is checked), and 'Delete'. An 'Apply' button is at the bottom. Another blue arrow points from the configuration box to the 'User List' table below. The table has columns: 'Employee ID', 'Name', 'User Name', and 'Division'. The 'Division' column is the one that was added via the configuration. The table contains several rows of data, including 'Chen Harrison', 'CSC CSC', 'Davis Elizabeth', 'delmaradmin delmaradmin', 'Demo NJ' (which has a checked checkbox), and 'Doug James'.

Employee ID	Name	User Name	Division
Chen Harrison	testsuper001	Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division	Training M...
CSC CSC	CSC	Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division	
Davis Elizabeth	elizabethmgr	Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division	
delmaradmin delmaradmin	delmaradmin	Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division	
Demo NJ	njdemo	Civil Service Commission (CSC)---Civil Service Commission (CSC) Region---Civil Service Commission (CSC) Division	
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 Name Column in ascending order	Sort by Name Column in descending order
Name  <ul style="list-style-type: none"> Account Admin1 Account Admin2 Account Admin3 Ackerman Melville J Adelman Patti Admin Aps 	Name  <ul style="list-style-type: none"> 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.

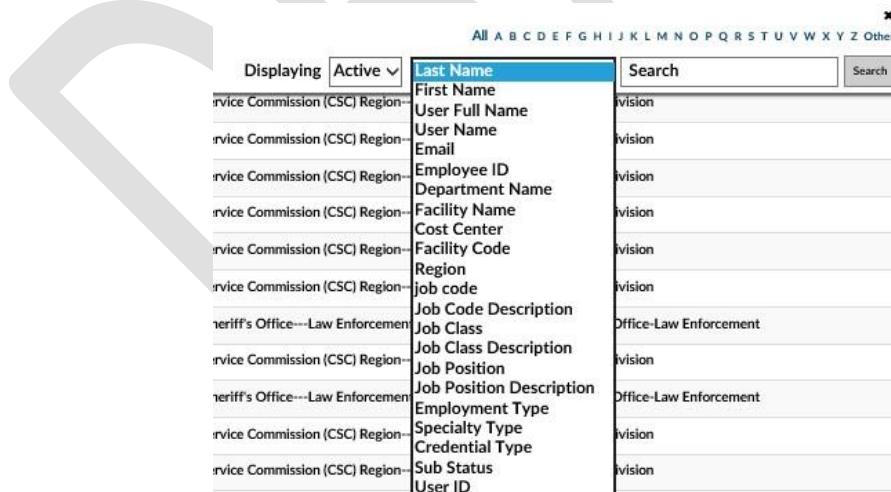
Use the letters for a quick Last Name filter.



The screenshot shows a search interface with the following elements:

- A dropdown menu labeled "Displaying" with "Active" selected.
- A dropdown menu labeled "Last Name" with "All" selected, showing options from A to Z and "Other".
- A search bar with a magnifying glass icon and a "Search" button.

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.



The screenshot shows a search interface with the following elements:

- A dropdown menu labeled "Displaying" with "Active" selected.
- A dropdown menu labeled "Last Name" with "All" selected, showing options from A to Z and "Other".
- A search bar with a magnifying glass icon and a "Search" button.
- The "Last Name" dropdown is expanded, showing a list of filter options:

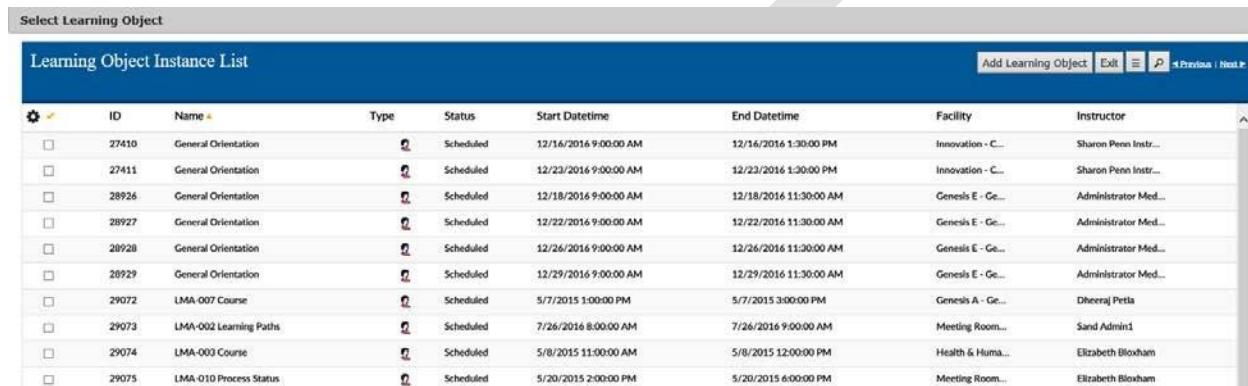
 - First Name
 - User Full Name
 - User Name
 - Email
 - Employee ID
 - Department Name
 - Facility Name
 - Cost Center
 - Facility Code
 - Region
 - Job code
 - Job Code Description
 - Job Class
 - Job Class Description
 - Job Position
 - Job Position Description
 - Employment Type
 - Specialty Type
 - Credential Type
 - Sub Status
 - User ID

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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**.

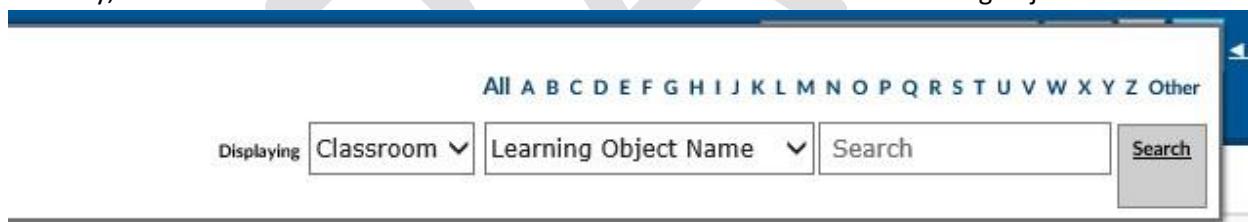


This will bring up the **Enroll Users** button. Click to launch the **Select Learning Object / Learning Object Instance List**.



	ID	Name	Type	Status	Start Datetime	End Datetime	Facility	Instructor
<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 E - Ge...	Dheeraj Patta
<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.



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.



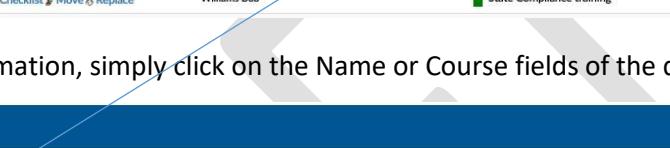
The screen will refresh, the **Select Learning Object / Learning Object Instance List** will close and a confirmation message will appear in the top of the screen either confirming that selected users were enrolled in the selected courses or providing reasons why they were unable to be enrolled.

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

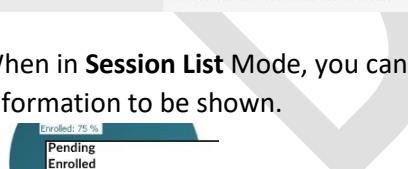
Authorizer Info

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): Lsglm Administrator
Vendor:	Direction: *
Location*: Data Center - Command Center ADDRESS : 2213 Executive Drive	Notes: *
2/18/2017 11:13 AM (Enrolled, Administrator Lsglm 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**

ee ID C
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

Learnsoft

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' data view. At the top left is a 'Session List' header with a gear icon and a checkmark. Below it is a table with columns: ID, Actions, Name, Employee ID, Course, Enroll Date, Status, and Due Date. The 'Actions' column contains checkboxes for grading options: Not Graded, No Show, Complete, Skip, Move, and Replace. The 'Course' column shows course names like 'Captivate Project No Test 4' and 'TestGoToMeeting'. The 'Enroll Date' column shows dates like 'Enrolled'. The 'Status' and 'Due Date' columns also show 'Enrolled'. At the top right is a 'Displaying Enrolled' dropdown. On the right side of the table is a 'Actions' column with a magnifying glass icon. A large gray 'X' watermark is overlaid on the table. At the bottom right is a 'Next ▶' button.

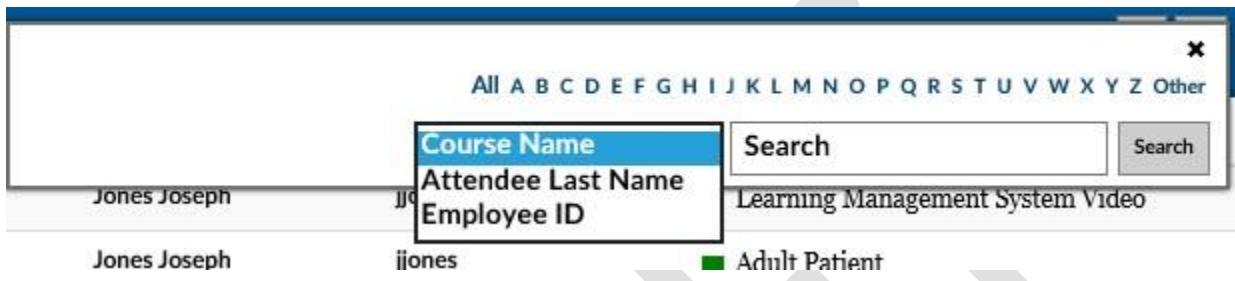
On the right side of the screen, a configuration panel is open. It has a title 'Session List' and a subtitle 'ID Actions'. It contains a list of checkboxes for columns: All, Active, Department, Type, Start Datetime, End Datetime, Facility, Enroll Date (checked), Status (checked), Attempted Enroll Date, and Due Date (checked). At the bottom of the panel is a blue 'Apply' button.

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
<p>Course ▲</p> <ul style="list-style-type: none"> ■ ■ ■ ■ ■ 2009 inservice Sept ■ 2009 inservice Sept ■ Access 2010 Introduction ■ ACLS - Provider - 12 contact hours BRN ■ Adult Patient 	<p>Course ▼</p> <ul style="list-style-type: none"> ■ Weapons of Mass Destruction - Chemical ■ UPDATED 2016 FSRMC RN 9N Transitional Care Unit Annual Competency ■ UPDATED 2016 FSRMC RN 9N Transitional Care Unit Annual Competency ■ Tuberculin Skin Test

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.

The screenshot shows the Learnsoft dashboard. On the left, there is an 'Overall Dashboard' section with large numbers 64, 2, and 2, and smaller text for 'Upcoming Courses' (1 Online, 24 Classroom) and 'Courses Due' (2 Online Due, 0 Classroom Due). A green box highlights '4 Course(s) Needing Approval'. On the right, there are two main sections: 'Pending Certifications' (0 Due Soon / 0 Expired) and 'Incomplete Evaluations' (6). Below these is an 'Employee Listing' with 25 entries and a 'Total Delinquent Users' count of 1,506. At the bottom, there is a 'Session List' table with columns: Actions, ID, Name, Employee ID, Course, and Active. The table shows four rows for users 161, 162, 163, and 164, each with an 'Enroll' and 'Deny' link. A dropdown menu above the table is set to 'Displaying Pending'.

Actions	ID	Name	Employee ID	Course	Active
<input type="checkbox"/> Enroll Deny	161	Smith Mario	msmith	CPR 2017	True
<input type="checkbox"/> Enroll Deny	162	Smith Mary Anne	masmith	CPR 2017	True
<input type="checkbox"/> Enroll Deny	163	Smith Sarah	ssmith	CPR 2017	True
<input type="checkbox"/> Enroll Deny	164	Smith Jane	jsmith	CPR 2017	True

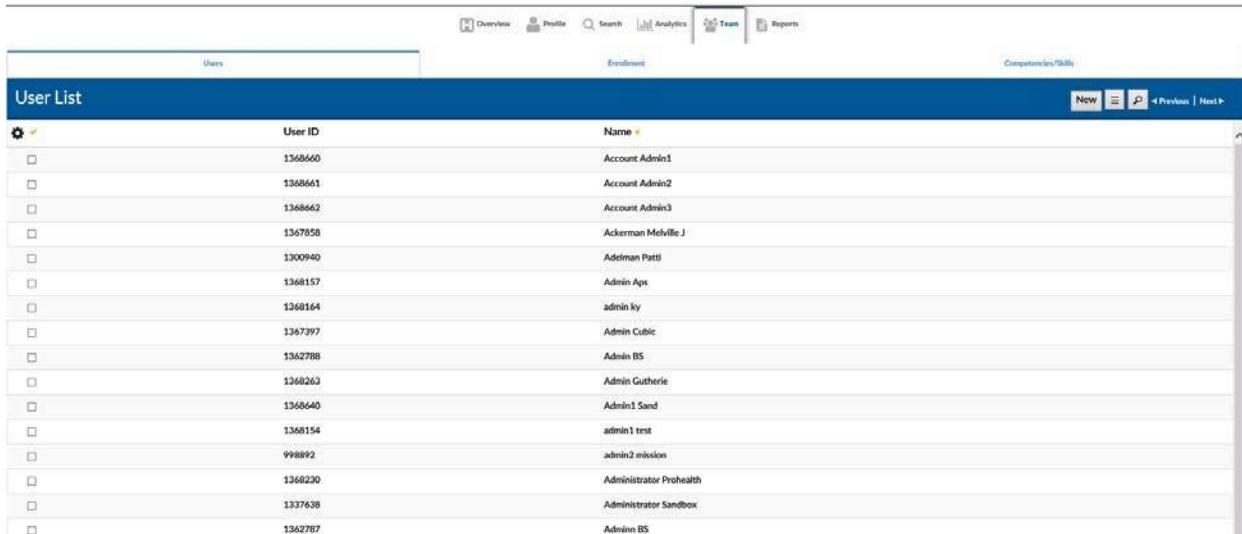
- [Enroll](#) Click the Enroll text link to approve the enrollment.
- [Deny](#) Click the Deny text link to Deny the enrollment

Learnsoft

Team Tab

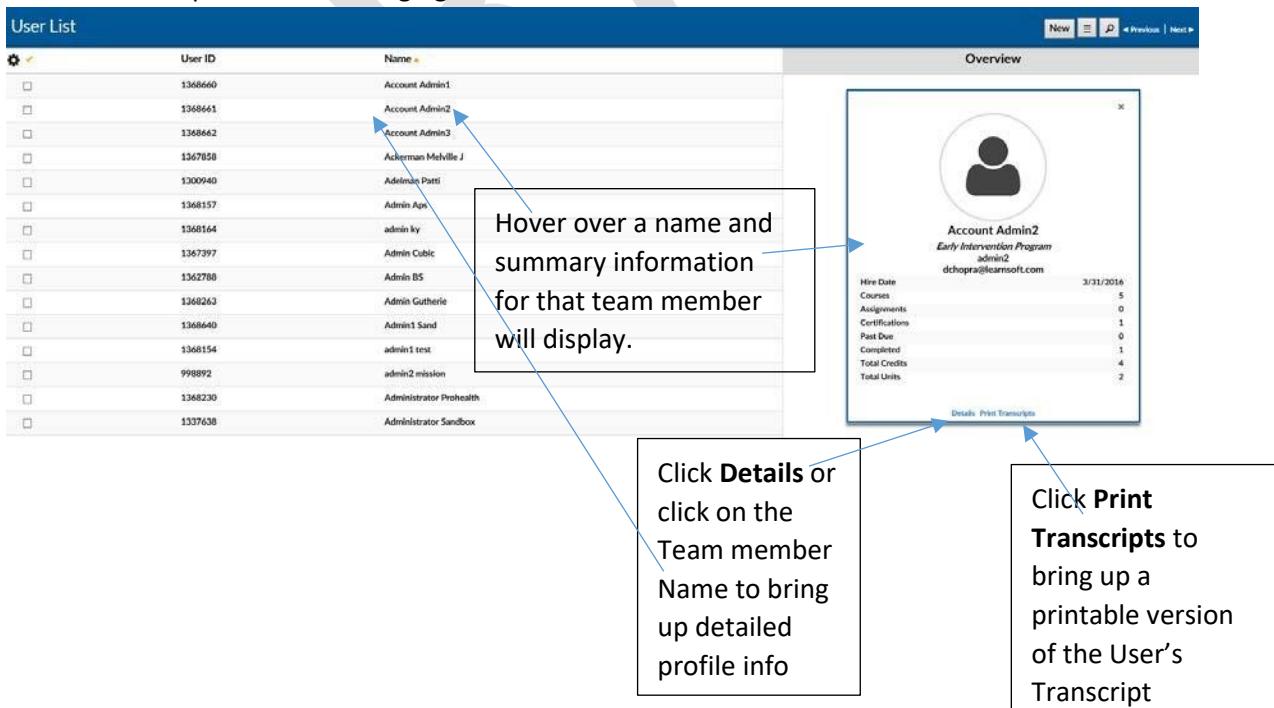
The **Team** tab provides the manager with access to **User List** information in full screen format. It also allows the manager to drill down into **Users**, **Enrollment** and **Competencies / Skills** (if enabled).

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



The screenshot shows the 'User List' page in the Learnsoft interface. The top navigation bar includes 'Overview', 'Profile', 'Search', 'Analytics', 'Team' (which is the active tab), and 'Reports'. The main content area is titled 'User List' and displays a table with columns for 'User ID' and 'Name'. The 'Name' column is sorted in descending order. The table contains 20 rows of user data, with the last few rows being placeholder names like 'admin1 test' and 'admin2 mission'. The right side of the page has a 'Competencies/Skills' section with a 'New' button and navigation arrows.

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 screenshot shows the 'User List' page with a 'User Overview' box for 'Account Admin2' displayed on the right. The overview box includes a user icon, the name 'Account Admin2', the program 'Early Intervention Program', and the email 'dchopra@learnsoft.com'. It also shows summary statistics: Hire Date (3/31/2016), Courses (5), Assignments (0), Certifications (1), Past Due (0), Completed (1), Total Credits (4), and Total Units (2). Below the overview are 'Details' and 'Print Transcripts' buttons. Three callout boxes provide instructions: 1) 'Hover over a name and summary information for that team member will display.' (pointing to the overview box), 2) 'Click Details or click on the Team member Name to bring up detailed profile info' (pointing to the 'Details' button), and 3) 'Click Print Transcripts to bring up a printable version of the User's Transcript' (pointing to the 'Print Transcripts' button).

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

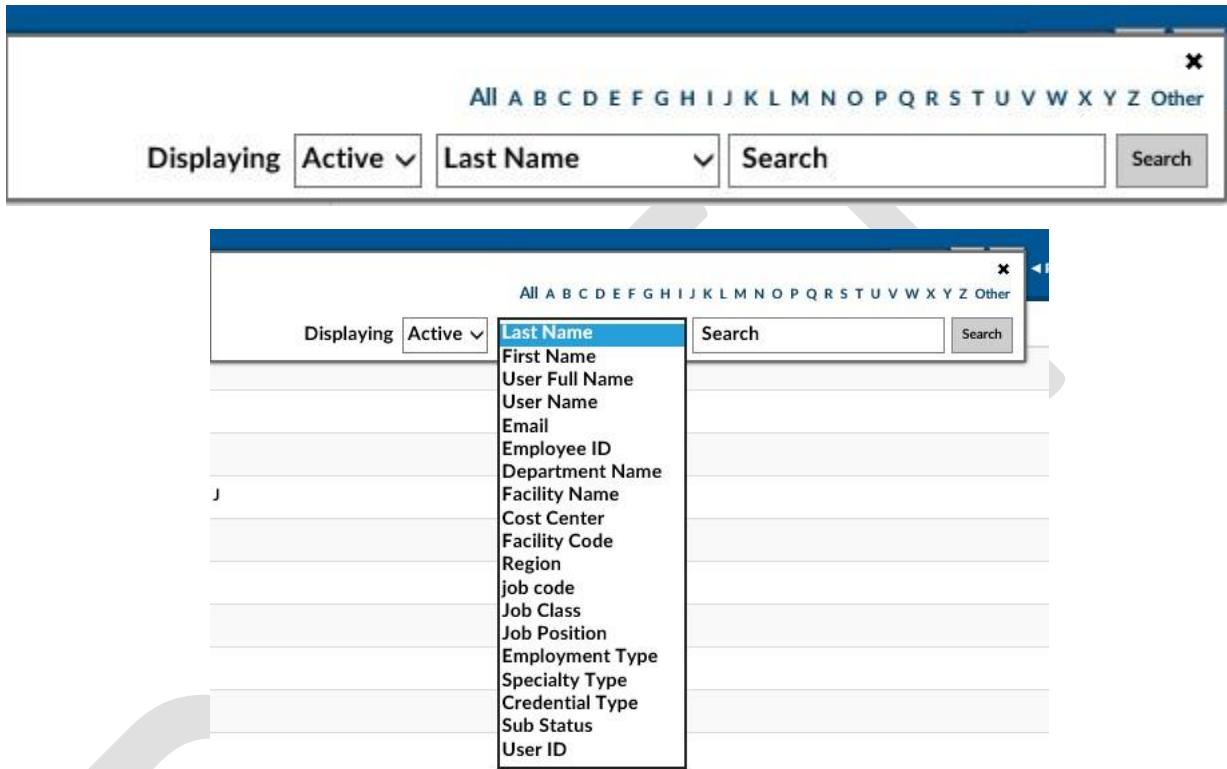
User ID	Name	Division	Last Name	First Name	Job Position
1368660	Account Admin1	NJ—3 MeduRx Plaza—Early Intervention Program A-3COOPER-00100784		Account	Admin1
1368661	Account Admin2	NJ—3 MeduRx Plaza—Early Intervention Program A-3COOPER-00100784		Account	Admin2
1368662	Account Admin3	NJ—3 MeduRx Plaza—Early Intervention Program A-3COOPER-00100784		Account	Admin3
1367858	Ackerman Melville J	NJ—External—Community Physician EXT-CP		Ackerman	Melville
1300940	Adelman Patti	NJ—Kelemen Bldg—Post Anesthesia Care Unit A-KELEMEN-00100465		Adelman	Patti
1366157	Admin Aps	NJ—Kelemen Bldg—Emergency Room Registration A-KELEMEN-00100906		Admin	Aps
1368164	admin ky	NJ—3 MeduRx Plaza—Med + Research 3 MeduRx Plaza A-3MeduRx-07586601		admin	ky
1367397	Admin Cubic	NJ—3 MeduRx Plaza—Behavioral Health Dept BHD-201		Admin	Cubic
1362788	Admin BS	NJ—3 MeduRx Plaza—Behavioral Health Dept BHD-201		Admin	BS
1368263	Admin Gutherie	NJ—3 MeduRx Plaza—Behavioral Health Dept BHD-201		Admin	Gutherie
1366840	Admin1 Sand	NJ—Kelemen Bldg—Emergency Room Registration A-KELEMEN-00100906		Admin1	Sand
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 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

<input type="checkbox"/>	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 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 ▾ Search Search

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.

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 session
 testuser102 testuser102 has been successfully enrolled. (ACLS Course 1)

Overview Profile Search Analytic

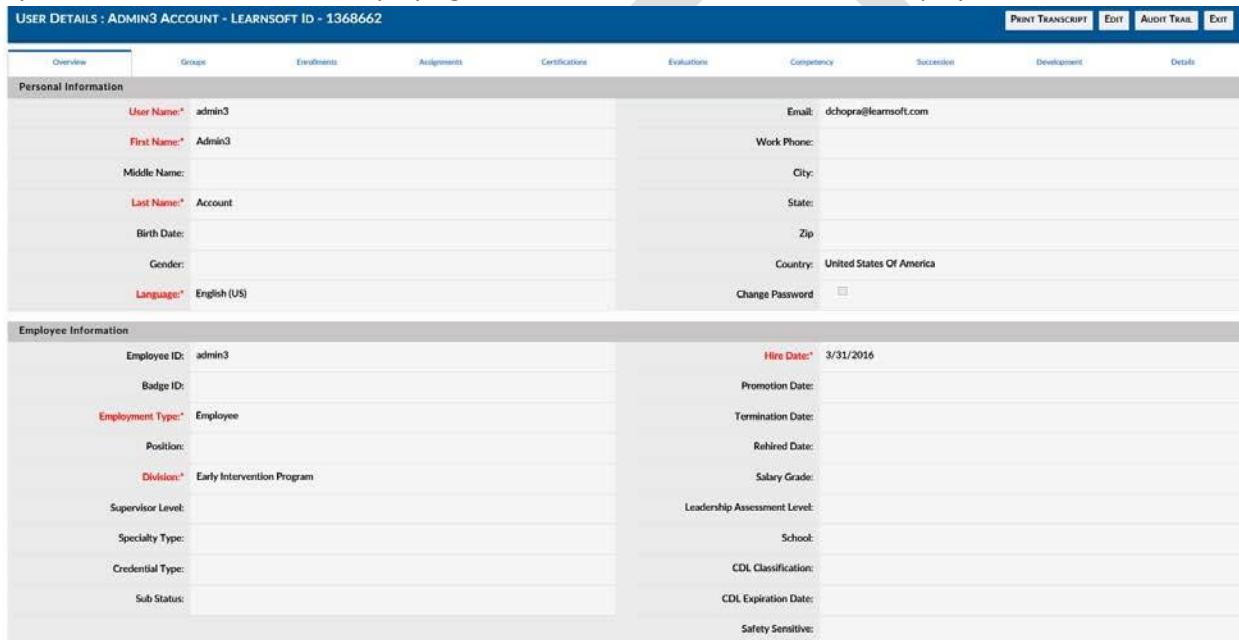
Team Tab – Team Member Profile (User Details)

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

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Overview	Groups	Enrollments	Assignments	Certifications	Evaluations	Competency	Succession	Development	Details																				
Personal Information <table border="1"> <tr> <td>User Name*: admin3</td> <td>Email: dchopra@learnssoft.com</td> </tr> <tr> <td>First Name*: Admin3</td> <td>Work Phone:</td> </tr> <tr> <td>Middle Name:</td> <td>City:</td> </tr> <tr> <td>Last Name*: Account</td> <td>State:</td> </tr> <tr> <td>Birth Date:</td> <td>Zip:</td> </tr> <tr> <td>Gender:</td> <td>Country: United States Of America</td> </tr> <tr> <td>Language*: English (US)</td> <td>Change Password</td> </tr> </table>										User Name*: admin3	Email: dchopra@learnssoft.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						
User Name*: admin3	Email: dchopra@learnssoft.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																												
Employee Information <table border="1"> <tr> <td>Employee ID: admin3</td> <td>Hire Date*: 3/31/2016</td> </tr> <tr> <td>Badge ID:</td> <td>Promotion Date:</td> </tr> <tr> <td>Employment Type*: Employee</td> <td>Termination Date:</td> </tr> <tr> <td>Position:</td> <td>Rehired Date:</td> </tr> <tr> <td>Division*: Early Intervention Program</td> <td>Salary Grade:</td> </tr> <tr> <td>Supervisor Level:</td> <td>Leadership Assessment Level:</td> </tr> <tr> <td>Specialty Type:</td> <td>School:</td> </tr> <tr> <td>Credential Type:</td> <td>CDL Classification:</td> </tr> <tr> <td>Sub Status:</td> <td>CDL Expiration Date:</td> </tr> <tr> <td></td> <td>Safety Sensitive:</td> </tr> </table>										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:
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:



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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.
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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	NJ - J MeduRx Plaza – Early Intervention Program A-JCOOPER-00100784					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										
Learning Object	Status	Complete Dates	Type	Start Date	Score	Assignment	Attachment	Actions		
cultural competency newbuild module2	Enrolled		On-Line Training Course	3/31/2016		Enrolled (Manager)		<input type="checkbox"/> Select	<input checked="" type="checkbox"/> Cancel	
General Orientation	Completed	3/31/2016	Classroom Instruction	3/31/2016 1:15 PM		Enrolled (Manager)				
Centerline Waitlist Demo Course	Cancelled By Admin (Admin3 Sandi)		Classroom Instruction	3/31/2016 7:00 AM		Enrolled (Manager)				
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	7/28/2016 10:00 AM		Enrolled (Required By Manager)				
Show More 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 Dates	Type	Start Date	Score	Assignment	Attachment	Actions		
cultural competency newbuild module2	Enrolled		On-Line Training Course	3/31/2016		Enrolled (Manager)		<input type="checkbox"/> Select	<input checked="" type="checkbox"/> Cancel	
General Orientation	Completed	3/31/2016	Classroom Instruction	3/31/2016 1:15 PM		Enrolled (Manager)				
Centerline Waitlist Demo Course	Cancelled By Admin (Admin3 Sandi)		Classroom Instruction	3/31/2016 7:00 AM		Enrolled (Manager)				
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	7/28/2016 10:00 AM		Enrolled (Required By Manager)				
General Orientation	Enrolled		Classroom Instruction	8/1/2016 8:00 AM		Enrolled (Manager)		<input type="checkbox"/> Select	<input checked="" type="checkbox"/> Cancel	
Test - MG	Enrolled		On-Line Training Course			Enrolled (Manager)		<input type="checkbox"/> Select	<input checked="" type="checkbox"/> Cancel	
GRE Exam B	Enrolled		On-Line Training Course			Enrolled (Manager)		<input type="checkbox"/> Select	<input checked="" type="checkbox"/> Cancel	
Captivate 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	8/7/2016 8:30 AM		Enrolled (Manager)		<input type="checkbox"/> Select	<input checked="" type="checkbox"/> Cancel	
Show More List of 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.

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

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Overview	Groups	Enrollments	Assignments	Certifications	Evaluations	Competency	Succession	Development	Details
Available Learning Object Sessions									
Learning Object	Status	Complete Dates	Type	Start Date	Score	Assignment	Attachment	Actions	
Centerline Waitlist Demo Course	Cancelled By Admin (Admin Sand)		Classroom Instruction	7/31/2016 7:00 AM	Course	Enrolled (Manager)			
General Orientation	Completed	3/31/2016	Classroom Instruction	3/31/2016 1:15 PM	Course	Enrolled (Manager)			
cultural competency newbuild module2	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Harvard MM - Managing Upward	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Ebola Advanced Training	Enrolled		Classroom Instruction	7/28/2016 10:00 AM	Course	Enrolled (Required By Manager)			
General Orientation	Enrolled		Classroom Instruction	11/13/2016 8:00 AM	Course	Enrolled (Manager)			
Test - MG	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
CRE Exam B	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Captivate Project No Test 4	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Z Test Course	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Course for Instructor Evaluation	Enrolled		Classroom Instruction	9/7/2016 8:30 AM	Course	Enrolled (Manager)			

Show Short List of Learning Object Sessions

Cancel any not completed courses which you, as the Manager, enrolled the user by clicking the **Cancel** 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 Dates	Type	Start Date	Score	Assignment	Attachment	Actions	
Centerline Waitlist Demo Course	Cancelled By Admin (Admin Sand)		Classroom Instruction	7/31/2016 7:00 AM	Course	Enrolled (Manager)			
General Orientation	Completed	3/31/2016	Classroom Instruction	3/31/2016 1:15 PM	Course	Enrolled (Manager)			
cultural competency newbuild module2	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Harvard MM - Managing Upward	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Ebola Advanced Training	Enrolled		Classroom Instruction	7/28/2016	Course	Enrolled (Required By Manager)			
General Orientation	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Test - MG	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
CRE Exam B	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Captivate Project No Test 4	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Z Test Course	Enrolled		On-Line Training	Course	On-Line Training	Enrolled (Manager)	<input type="checkbox"/> Select 		
Course for Instructor Evaluation	Enrolled		Classroom Instruction	9/7/2016 8:30 AM	Course	Enrolled (Manager)			

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
Available Certifications									
Certification Name	Requires 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
Personal Information									
First Name*	spudwin				Email	spudwin@learnsoft.com			
Middle Name	Am				Work Phone				
Last Name*	Admin				City				
Birth Date					State				
Gender					Zip				
Language*	English (US)				Country	United States Of America			
					Change Password	...			
Employee Information									
Employee ID					Hire Date*	9/1/2014			
Badge ID					Promotion Date				
Employee Type*	Employee				Termination Date				
Position					Retired Date				
Division*	Emergency Room Registration				Salary Grade				
Supervisor Level					Leadership Assessment Level				
Specialty					School				
Credential Type					COL Classification				
Job Status					COL Expiration Date				
					Safety Sensitivity				
Available Groups									
Group Name	Internal Groups				Primary Affiliation				
External ID#	100				Primary	Yes			
Administrator	No				Secondary	No			
Active	No				Terminated	Yes			
					Active	Yes			
Current Supervisors									
Supervisor									
Current Licenses									
License									
Current Custom User Field									
Custom User Type									
Available Certifications									
Certification Name	Requires Credits	Credit Hours	Credit Units	Learning Object	Issue Date	Expires On	Complete		
Highway Driving	No			Highway Driving	Yes	7/21/2017	Yes		
Available Learning Object Sessions									
Learning Object	Start Date	Completion Date	Time	End Date	State				
Highway Driving	Completed: 8/29/2014		Completed	2014-08-29T00:00:00	Completed				
Highway Driving Training	Enrolled		On-Line	2014-08-29T00:00:00	Enrolled				



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 interface. On the left, there is a sidebar with 'Criteria' and 'Result' tabs. The 'Criteria' tab is active, showing a search bar with 'Search for...' and a 'Search' button. Below the search bar are filters for 'Catalog' (selected) and 'Course Type' (All, Classroom, Online, Event, Certification). There is also an 'Advanced Search' link. The 'Result' tab is active, showing a list of course results. Each result includes a thumbnail, the course name, type, start and end times, description, and room information. To the right of each result are 'Enroll' and 'Details' buttons. At the bottom of the results list, it says '1748 Results (0 Selected) - Page 1 of 100' and has buttons for 'Select All', 'Unselect All', 'Remove Selected', and 'Remove Unselected'.

Thumbnail	Course Name	Type	Start	End	Description	Room	Enroll	Details
	ACLS Course 1	Classroom	2/9/2017 5:00 AM	2/9/2017 7:00 AM	Type: Classroom Instruction Course Start: 2/9/2017 5:00 AM End: 2/9/2017 7:00 AM Description: Room: TBD - TBD			
	Leadership Level Skills	Classroom	3/1/2017 10:00 PM	3/1/2017 10:30 PM	Type: Classroom Instruction Course Start: 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	3/2/2017 9:00 AM	3/2/2017 11:00 AM	Type: Classroom Instruction Course Start: 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	3/1/2017 1:00 PM	3/1/2017 1:45 PM	Type: Classroom Instruction Course Start: 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	3/2/2017 3:00 PM	3/2/2017 4:00 PM	Type: Classroom Instruction Course Start: 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	3/3/2017 9:00 AM	3/3/2017 10:00 AM	Type: Classroom Instruction Course Start: 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	3/3/2017 1:00 PM	3/3/2017 2:00 PM	Type: Classroom Instruction Course Start: 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

The diagram illustrates the search interface with the following components and annotations:

- Criteria**: The main search interface with a **Search for...** field and a **Search** button.
- Free Text Field allows you to enter keywords**: A callout pointing to the **Search for...** field.
- Select Course Type to narrow results.**: A callout pointing to the **Course Type** section, which includes options for All, Classroom, Online, Event, and Certification.
- Click the Search button when ready to search**: A callout pointing to the **Search** button.
- Start entering keywords**: A callout pointing to the **Search for...** field.
- Result List**: The search results page showing a list of course titles.

Result List Content:

```

Criteria          Result List
Search for...      Get
Search           Learning Object Name
Getting Ready to Present
Getting Results without Direct Authority: Building Relationships and Credibility
Getting Results without Direct Authority: Persuasive Communication
Getting Results without Direct Authority: Reciprocity
Getting Results without Direct Authority: Influencing Your Boss
Getting Ready to Present
Getting Time under Control
Getting Started with Access 2010
Getting Started with Excel 2010
Getting Started with Outlook 2010
Getting Started with PowerPoint 2010
Getting Started with Visio 2010
Getting Started with Word 2010
Getting Started with SharePoint 2010
Getting Online, Sharing, and Using SkyDrive in Windows 8.1
Getting Started with Windows 7
Getting Started with WCF 4 Using C# 2010
Getting Started with ADO.NET 4 DataSets Using C# 2010
Getting Started with WCF 4 using VB 2010
Getting Started with ADO.NET 4 Connections and Commands Using Visual Basic 2010
Getting Started with ADO.NET 4 DataSets using Visual Basic 2010
  
```

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

The **Result List** page displays the following course entries:

Course Title	Type	Description	Enroll
Getting Ready to Present	Type: On-Line Training Course	Description: Are great presenters born or made? If they're made, how? What do you do to become skilled at presenting? The answer may simply be more . Find out as much as you can about your audience, and clearly define your purpose. Then...	Enroll
Getting Results without Direct Authority: Building Relationships and Credibility	Type: On-Line Training Course	Description: How can you get results if you don't have authority? Cultivating relationships and establishing credibility are necessary, because they allow you to influence others. If you have effective influencing skills, you'll be able to get what you need.	Enroll
Getting Results without Direct Authority: Influencing Your Boss	Type: On-Line Training Course	Description: The idea that you can influence your boss may seem at odds with a traditional view of the boss-employee relationship. But you know best how you want to be managed to reach your goals, and if you focus on building a partnership...	Enroll
Getting Results without Direct Authority: Persuasive Communication	Type: On-Line Training Course	Description: Communicating persuasively is key when you want to get results in situations where you don't have direct authority. To communicate persuasively, it's important to think from the other person's perspective. How and what you ask, and...	Enroll
Getting Results without Direct Authority: Reciprocity	Type: On-Line Training Course	Description: One way to get results without authority is to leverage the law of reciprocity. For example, you help someone with a difficult analysis and that person in turn helps you put together a presentation. Or you support a colleague in a meeting, and...	Enroll

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Search – Advanced search

Criteria

Search for...

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.

Room : Innovation - Central - Magnet 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

Enroll Details

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.

LEARNING OBJECT INSTANCE

Please click Enroll button for enrolling in this learning activity.

COURSE INFO

Course Name: 2016 FSRMC RN 9N Transitional Care Unit Annual Competency

Description: 9N Unit specific competencies

Vendor:

Authorizer: Account Admin1
Account Admin2
Account Admin3
Adelman Patti
Admin Aps
Admin Cubic

Payment Mode:

Paid Time:

Due date:

List Price: Free

Start Date: 9/1/2016 9:00 AM PST

End Date: 9/1/2016 5:00 PM PST

Duration (in hours):

Notes:

Location: School of Nursing Classroom - School of Nursing Classroom

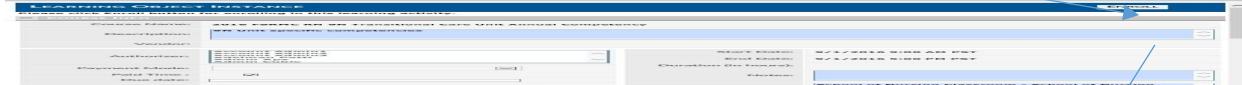
ENROLL

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

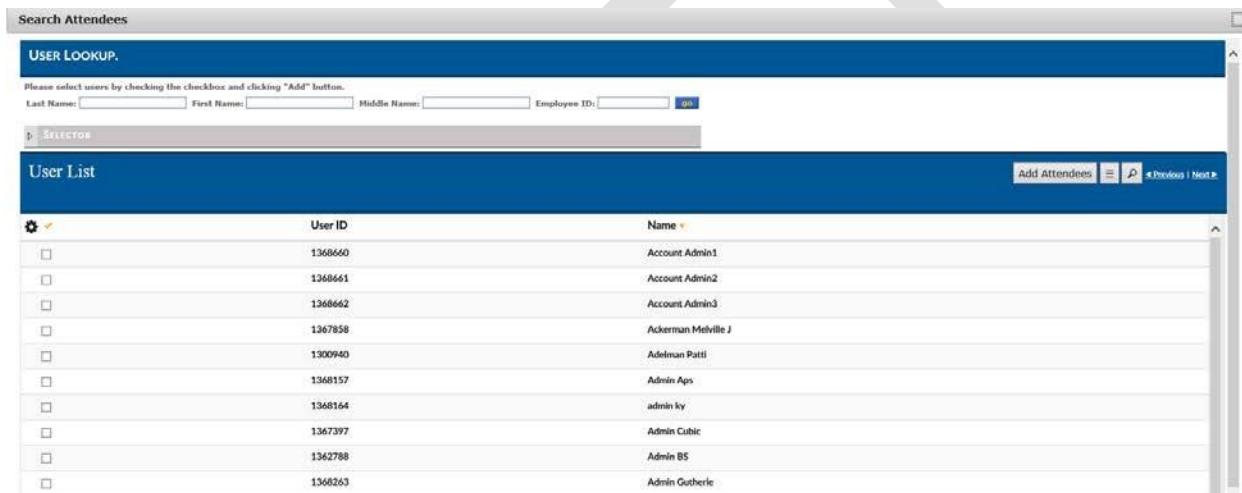
If additional Authorization is required, select an Authorizer from this list.

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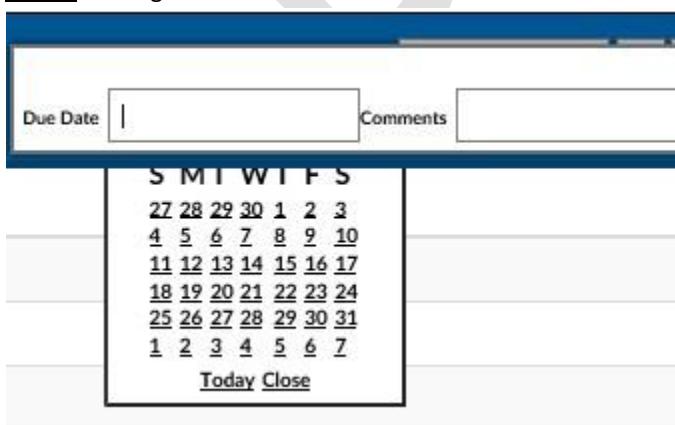
To Enroll your Team Members, click the **Enroll** button to the right of the row of the desired course.



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 before clicking the Add Attendees button.

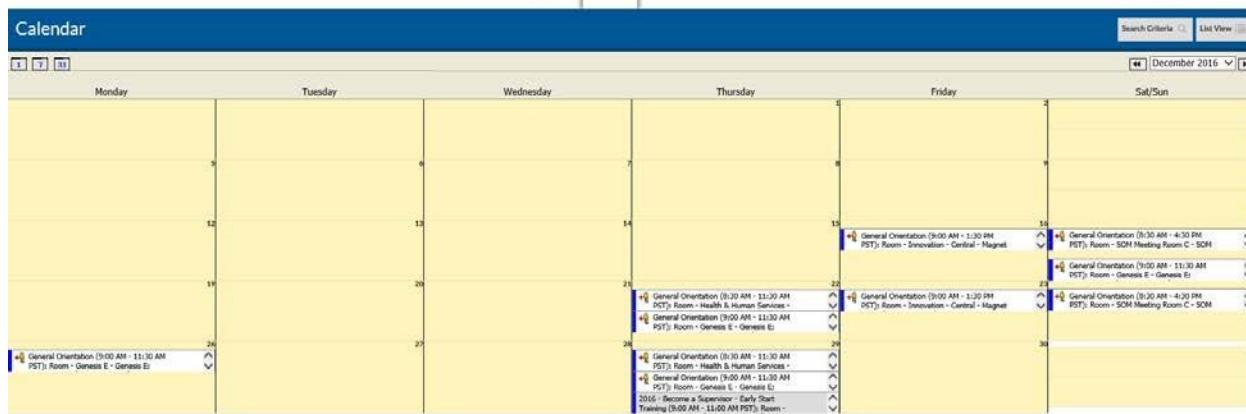


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Search – Calendar Lookup & (Manager) Enroll Team

Calendar View

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



The screenshot shows a monthly calendar for December 2016. The days of the week are labeled at the top: Monday, Tuesday, Wednesday, Thursday, Friday, Sat/Sun. The dates are listed vertically on the left. Several scheduled events are shown as blue boxes with icons and descriptions. For example, on December 15, there are three events: "General Orientation (9:00 AM - 11:30 AM PST) Room - Innovation - Central - Magnet" (with a person icon), "General Orientation (9:00 AM - 11:30 AM PST) Room - Innovation - Central - Magnet" (with a person icon), and "General Orientation (9:00 AM - 11:30 AM PST) Room - SOM Meeting Room C - SOM" (with a person icon). On December 26, there is an event "2016 - Become a Supervisor - Early Start Training (9:00 AM - 11:00 AM PST) Room -" (with a person icon). The "Search Criteria" and "List View" buttons are at the top right, and the date "December 2016" is selected.

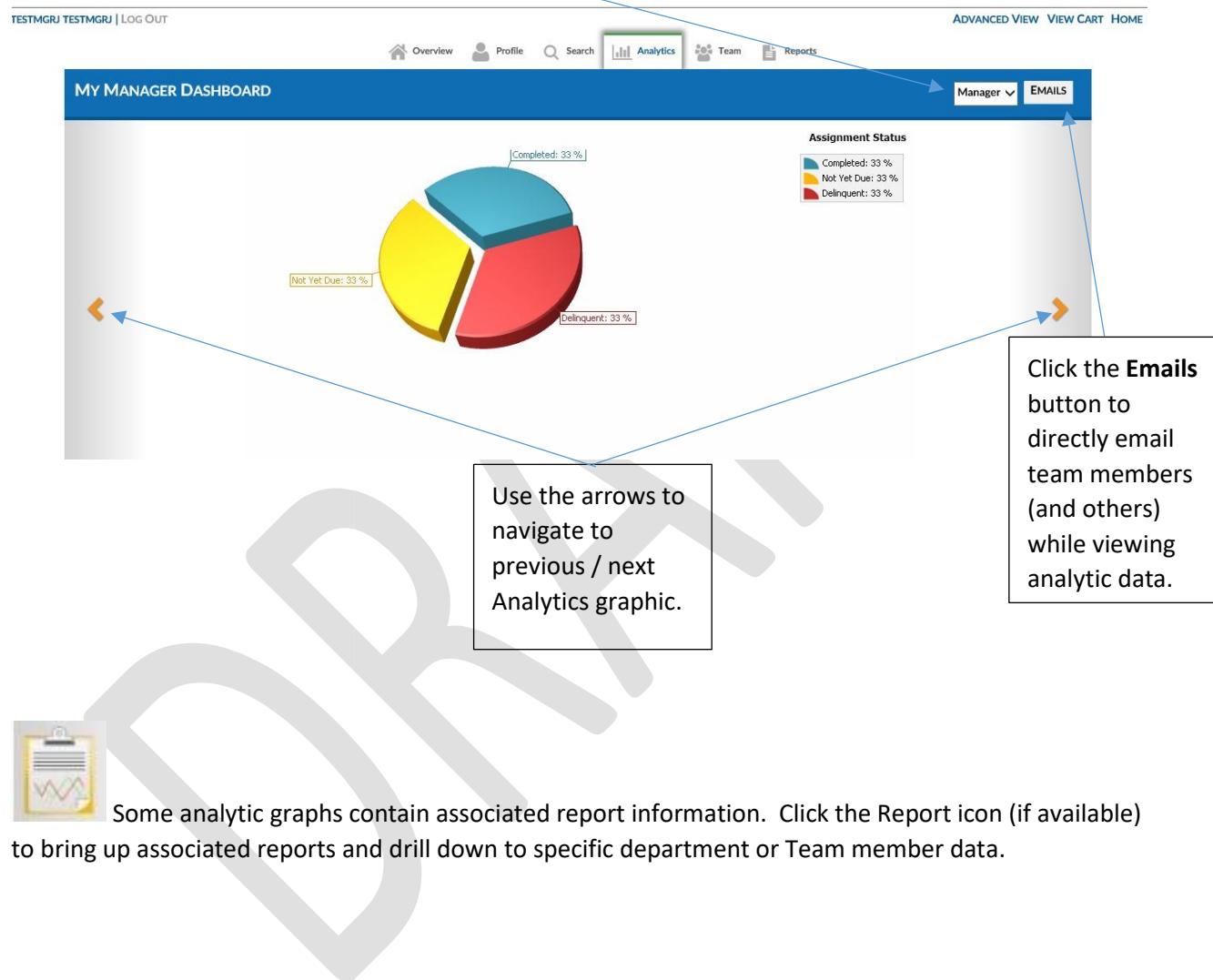
Click the Enroll Users icon 

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.

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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**.



The screenshot shows the 'My Manager Dashboard' with the 'Analytics' tab selected. A 3D pie chart displays assignment status: Completed (33%), Not Yet Due (33%), and Delinquent (33%). To the right is a legend for 'Assignment Status' with the same three categories. At the top right, there are buttons for 'Manager' (dropdown) and 'EMAILS'. A callout box with a grey arrow points to the 'EMAILS' button, containing the text: 'Click the **EMAILS** button to directly email team members (and others) while viewing analytic data.' Another callout box with a grey arrow points to the left side of the dashboard, containing the text: 'Use the arrows to navigate to previous / next Analytics graphic.'

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.*

TESTMGRU TESTMGRU | LOG OUT ADVANCED VIEW VIEW CART HOME



Report List				
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

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  EXPORT REPORT VIEW REPORT CANCEL

 **User Info Details**

Any Date:	<input checked="" type="radio"/> Date Range <input type="radio"/>
Start Date:	<input type="text"/>
End Date:	<input type="text"/>

 **Selector**

Course:	<input type="text"/>	Add
Job Class:	<input type="text"/>	Add
Job Code:	<input type="text"/>	Add
Job Position:	<input type="text"/>	Add
		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:** 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	<input type="button" value="▼"/>	2016	<input type="button" value="▼"/>			
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

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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

ID	Name	Type
14634	2016 - Become a Supervisor - Early Start Training	
14590	2016 FSRMC RN Y/N Transitional Care Unit Annual Competency	
14542	CBO SBO Customer Service Go Live Training	
14594	COMPETENCY TEST COURSES	
14592	Course for Instructor Evaluation	

Add Learning Object Previous | Next

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: Defensive Driving Ebola Advanced Training

Add Remove

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.*

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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.

A screenshot of a report viewer window titled 'Main Report'. The window includes a toolbar with icons for print, search, and navigation, and a status bar showing '1 of 1' and '100%'. A 'Find...' search bar is also present. The main content area displays a table of data with columns: Last Name, First Name, Employee ID, Facility, Facility Number, Department Name, Department Number, and Course Name. The data rows are: Account (Admin3, admin3, 3 MeduRx Plaza, A-3MeduRx, Early Intervention Program, 00100784, Ebola Advanced Training); Hood (Robin, 11111testuser9001, UdotInst7, 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 Registration, 00100906, Defensive Driving); Kaufman (Dan, dKaufman, Kelemen Bldg, A-KELEMEN, Emergency Room Registration, 00100906, Ebola Advanced Training); Khanna (Rishab, 11112, Fam Med - 639 MeduRx St, A-639Med, Fam Med - Urban Health, 07630959, Ebola Advanced Training). A 'Navigate to Next / Prev page (page 1 and 2 only)' button is highlighted. A 'Drill down to deeper data levels (if available)' button is located on the left. A 'Resize view' button is in the top right. A 'Search' box is labeled 'Enter text to search and click the search icon'. A 'Page' dropdown is labeled 'Dropdown to go to first / last page or type in page #'.

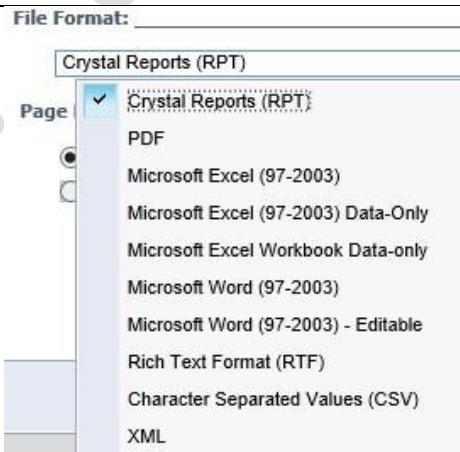
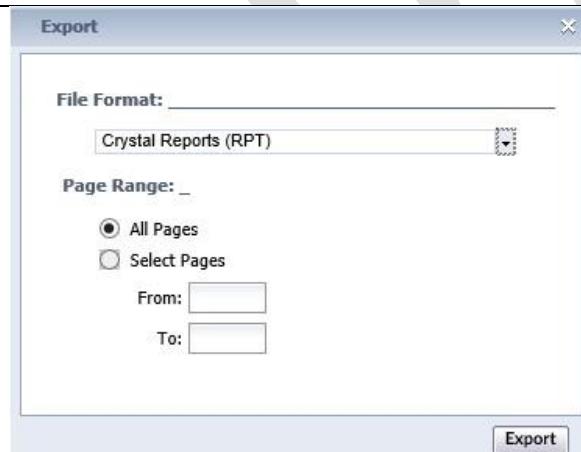
Click the **Print** icon to Print the Report to a PDF where it can be sent to your printer. Select pages and click the **Export** button.



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



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

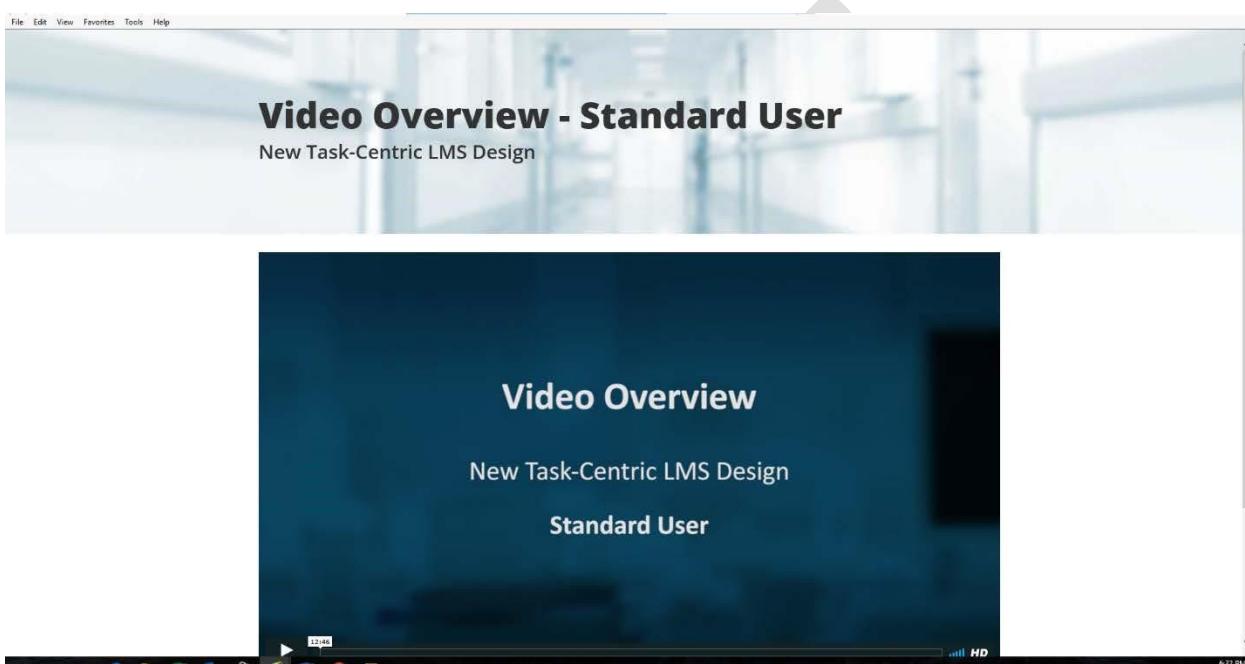


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Help Tab



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.

