



# 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**.

TESTMGU TESTMGU | LOG OUT

Overview Profile Search Analytics Team Reports

ADVANCED VIEW VIEW CART HOME

Group Manager

**Overall Dashboard**

216 Upcoming Courses  
91 Online  
125 Classroom

0 Pending Certifications  
0 Due Soon / 0 Expired

5 Incomplete Evaluations

30 Employee Listing

0 Total Delinquent Users

You are up to date!

March 2017

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



**User List**

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

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

## Overview Tab – Overall Dashboard: Status Icon

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

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

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 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

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				

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

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

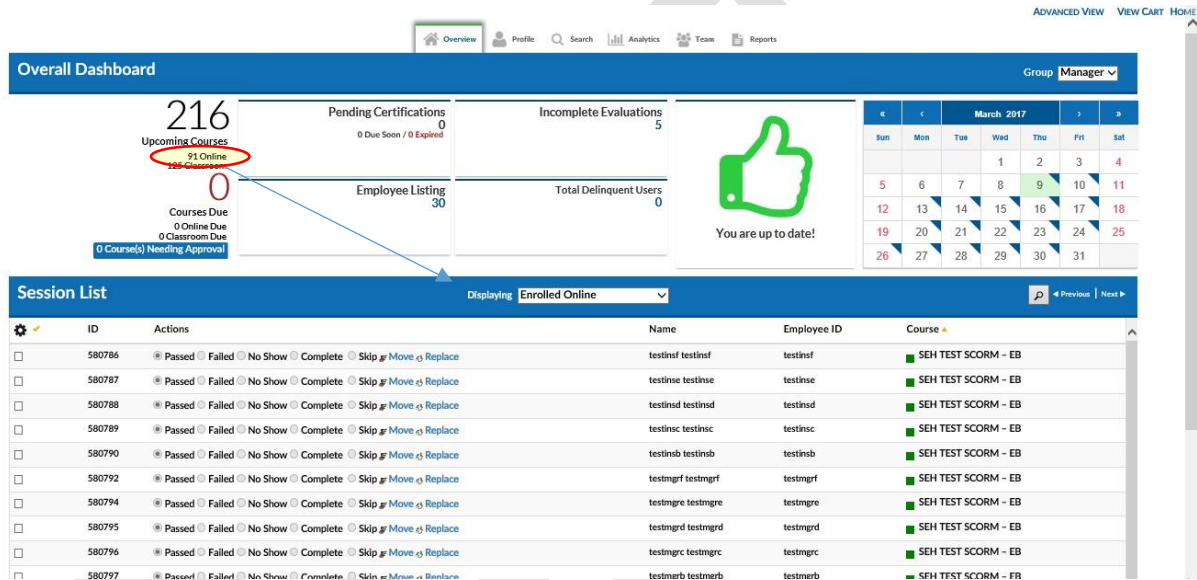
ID	Actions	Name	Employee ID	Course	Due Date
225	Not Graded No Show Complete Skip # Move Replace	Jones Joseph		Administrator Essential Functions - Banking	1/28/2017 12:00:00 AM
239	Not Graded No Show Complete Skip # Move Replace	Jones Joseph		DHS Training	1/28/2017 12:00:00 AM

## 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 displays the Learnsoft Overall Dashboard. The top navigation bar includes links for Overview, Profile, Search, Analytics, Team, and Reports. The main dashboard area is titled "Overall Dashboard" and features a "Group Manager" dropdown. The "Manager Metrics" section includes several key performance indicators (KPIs):

- 216 Upcoming Courses**: This metric is highlighted with a red circle, and a red circle around the number "91 Online" indicates a clickable hyperlink. Below this, it shows "0 Courses Due", "0 Online Due", "0 Classroom Due", and "0 Course(s) Neding Approval".
- Pending Certifications**: 0 Due Soon / 0 Expired
- Incomplete Evaluations**: 5
- Employee Listing**: 30
- Total Delinquent Users**: 0

To the right of the KPIs is a calendar for March 2017, showing the current date as the 9th. Below the KPIs is a green thumbs-up icon with the text "You are up to date!".

The bottom section of the dashboard is titled "Session List" and displays a table of sessions. The table has columns for ID, Actions, Name, Employee ID, and Course. The "Displaying" dropdown is set to "Enrolled Online".

ID	Actions	Name	Employee ID	Course
580786	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testinsf testinsf	testinsf	SEH TEST SCORM - EB
580787	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testinse testinse	testinse	SEH TEST SCORM - EB
580788	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testinsd testinsd	testinsd	SEH TEST SCORM - EB
580789	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testinsc testinsc	testinsc	SEH TEST SCORM - EB
580790	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testinsb testinsb	testinsb	SEH TEST SCORM - EB
580792	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testmgrf testmgrf	testmgrf	SEH TEST SCORM - EB
580794	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testmgre testmgre	testmgre	SEH TEST SCORM - EB
580795	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testmgrd testmgrd	testmgrd	SEH TEST SCORM - EB
580796	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testmgrc testmgrc	testmgrc	SEH TEST SCORM - EB
580797	Passed Failed No Show Complete Skip <a href="#">Move</a> <a href="#">Replace</a>	testmerb testmerb	testmerb	SEH TEST SCORM - EB

<p>64</p> <p>Upcoming Courses</p> <p>1 Online 24 Classroom</p>	<p><b>Upcoming Course</b> – A count of both Online and Classroom courses for which your team members been assigned or enrolled, but have not yet completed and whose deadlines have not passed nor whose class dates have passed</p> <ul style="list-style-type: none"> <li>• <b>Online</b> – A count of assigned / enrolled online courses only</li> <li>• <b>Classroom</b> - A count of assigned / enrolled Classroom courses only</li> </ul>
<p>2</p> <p>Courses Due</p> <p>2 Online Due 0 Classroom Due</p>	<p><b>Courses Due</b>– A count of Online and Classroom courses which your team members have not completed, but whose scheduled class time or assigned deadlines have passed.</p> <ul style="list-style-type: none"> <li>• <b>Online</b> – A count of your team’s online overdue courses only</li> <li>• <b>Classroom</b> - A count of your team’s Classroom overdue courses only</li> </ul>
<p>Pending Certifications</p> <p>0</p> <p>0 Due Soon / 0 Expired</p>	<p><b>Pending Certifications</b> – A count of certifications for which your team members have enrolled, but note yet completed.</p> <ul style="list-style-type: none"> <li>• <b>Due Soon</b> – A count of Certifications with due dates after the current date</li> <li>• <b>Expired</b> – A count of Certifications with due dates that have passed and are overdue</li> </ul>
<p>Incomplete Evaluations</p> <p>6</p>	<p><b>Incomplete Evaluations</b> – Evaluations which your team members still need to complete. Note: For some classes, your team will not receive course credit unless the associated evaluation has been completed.</p>
<p>Employee Listing</p> <p>25</p>	<p><b>Employee Listing</b> – A total count of your active team members in the LMS system</p>
<p>Total Delinquent Users</p> <p>1,506</p>	<p><b>Total Delinquent Users</b> – A count of team members who have overdue learning activities.</p>

## Overview Tab – Overall Dashboard: Manager Calendar

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

Overview – Manager View - Calendar

Calendar – Rolling over date with blue shading

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

◀ Back

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....

# Learnsoft

The screenshot shows the Learnsoft dashboard with several key sections and annotations:

- Overall Dashboard:** Includes metrics for Pending Certifications (0), Incomplete Evaluations (6), Employee Listing (25), and Total Delinquent Users (506).
- User List:** A table with columns for Employee ID, Name, and User ID. The table contains five rows of user data.
- Course Selection:** A sidebar on the right lists courses such as Probation Training LVL 10, General Orientation, Leadership Training LVL 3, and CPR 2017, each with an Enroll button.
- Annotations:**
  - A red hand icon points to the Enroll button for the Probation Training LVL 10 course.
  - A blue arrow points from the Enroll button to the User List table.
  - A blue arrow points from the User List table to the Enroll button.

Employee ID	Name	User ID
<input type="checkbox"/>	Chen Harrison	testsup
<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"/>	Doue James	JDOUG

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

## Overview Tab – User List / Session List

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

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



















































































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

Session List

Displaying Enrolled

Previous



Next

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

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





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@sbcscd.org	Gibbons William	wgibbons@sbcscd.org	
<input type="checkbox"/>		Grande Doris	DGRANDE1	
<input type="checkbox"/>		Hernandez Bob	tmsmanager	
<input type="checkbox"/>		Jones Joseph	JJONES	
<input type="checkbox"/>		Jms elizabeth	elizabethjms	
<input type="checkbox"/>		Martinez Selena	testuser002	
<input type="checkbox"/>		Michael Winn	mwinn	
<input type="checkbox"/>		Paige LaWanda	testdirect001	
<input type="checkbox"/>		ProbationII Manager	MgrProbationII	
<input type="checkbox"/>		Rogers Kelly	testuser003	

26 Users (2 Selected) - Page 1 Of 2

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.

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

26 Users (2 Selected) - Page 1 Of 2

Select All Unselect All Remove Selected Remove Unselected

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

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

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

# Learnsoft


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 screenshot illustrates the process of configuring the **User List** data view. A blue box labeled **User List** has a gear icon next to it. An arrow points from the gear icon to a configuration menu. The menu lists various columns with checkboxes: ☐ All, ☐ User ID, ☐ Active, ☒ Division, ☐ Last Name, ☐ First Name, ☐ Job Code, ☐ Job Class, ☒ Job Position, and ☐ Delete. An **Apply** button is at the bottom of the menu. Another arrow points from the **Apply** button to the **User List** table below. The table has a header bar with **User List**, **New**, **Actions**, and navigation buttons. The table columns are **Employee ID**, **Name**, **User Name**, **Division**, and **Job Position**. The data rows show users like Chen Harrison, CSC CSC, Davis Elizabeth, delmaradmin delmaradmin, Demo NJ, and Doug James, with their respective user names and divisions. A large **DRAFT** watermark is visible across the bottom half of the image.

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

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

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

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

Use the letters for a quick Last Name filter.

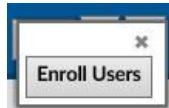
Displaying Active Last Name Search Search

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

Displaying		Active <input checked="" type="checkbox"/>	Last Name	Search
Service Commission (CSC) Region	First Name		vision	
Service Commission (CSC) Region	User Full Name		vision	
Service Commission (CSC) Region	User Name		vision	
Service Commission (CSC) Region	Email		vision	
Service Commission (CSC) Region	Employee ID		vision	
Service Commission (CSC) Region	Department Name		vision	
Service Commission (CSC) Region	Facility Name		vision	
Service Commission (CSC) Region	Cost Center		vision	
Service Commission (CSC) Region	Facility Code		vision	
Service Commission (CSC) Region	Region		vision	
Service Commission (CSC) Region	Job Code		vision	
Service Commission (CSC) Region	Job Code Description		vision	
Service Commission (CSC) Region	Job Class		vision	
Service Commission (CSC) Region	Job Class Description		vision	
Service Commission (CSC) Region	Job Position		vision	
Service Commission (CSC) Region	Job Position Description		vision	
Service Commission (CSC) Region	Employment Type		vision	
Service Commission (CSC) Region	Specialty Type		vision	
Service Commission (CSC) Region	Credential Type		vision	
Service Commission (CSC) Region	Sub Status		vision	
Service Commission (CSC) Region	User ID		vision	

# Learnsoft

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



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

Select Learning Object								
Learning Object Instance List								
<div> Add Learning Object Exit Previous Next </div>								
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

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.

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: <b>Enrolled</b>			Previous Next			
ID	Actions	Name	Employee ID	Course	Due Date	
72	Not Graded No Show Complete Skip Move Replace	RTC Delmar		Captivate Project No Test 4		
111	Passed Failed No Show Complete Skip Move Replace	TestUserXXX TestUserXXX		TestGoToMeeting		
112	Passed Failed No Show Complete Skip Move Replace	TestUserZZZ TestUserZZZ		TestGoToMeeting		
113	Passed Failed No Show Complete Skip Move Replace	TestUserYYY TestUserYYY		TestGoToMeeting		
114	Passed Failed No Show Complete Skip Checklist Move Replace	Gibbons William	wgibbons@sbcsl.org	State Compliance training		
115	Passed Failed No Show Complete Skip Checklist Move Replace	Rogers Kelly		State Compliance training		
116	Passed Failed No Show Complete Skip Checklist Move Replace	Martinez Selena		State Compliance training		
117	Passed Failed No Show Complete Skip Checklist Move 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: jgittelman@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

2/18/2017 11:13 AM (Enrolled, Administrator Lsglm d)

Notes:\*

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

Enrolled: 75 %

Pending

Enrolled

WaitList

Complete

Fail Complete

No Show

Class Session Complete

Enrolled Classroom

Enrolled Online

Enrolled Assignments

Enrolled Certifications

Enrolled Resume Courses

Displaying: **All Past Due Courses**

Past Due Courses - 30 days

Past Due Courses - 60 days

Past Due Courses - 90 days

Past Due Online

Past Due Classroom

Past Due Assignment

Past Due Certification

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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.

The screenshot shows the 'Session List' interface. A gear icon is clicked to open a configuration menu. The menu lists various columns with checkboxes: All, Active, Department, Type, Start Datetime, End Datetime, Facility, Enroll Date, Status, Attempted Enroll Date, and Due Date. The 'Enroll Date', 'Status', and 'Due Date' checkboxes are checked. An 'Apply' button is at the bottom of the menu. Below the menu, the 'Session List' table is shown with the following columns: ID, Actions, Name, Employee ID, Course, Enroll Date, Status, and Due Date. The table contains two rows of data.

ID	Actions	Name	Employee ID	Course	Enroll Date	Status	Due Date
72	Not Graded No Show Complete Skip Move Replace	RTC Delmar		Captivate Project No Test 4		Enrolled	
111	Passed Failed No Show Complete Skip Move Replace	TestUserXXX TestUserXXX		TestGoToMeeting		Enrolled	

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

Sort by <b>Course</b> Column in ascending order	Sort by <b>Course</b> Column in descending order
<div>Course ▲</div> <div> <div>■</div> <div>■</div> <div>■</div> <div>■</div> <div>■ 2009 inservice Sept</div> <div>■ 2009 inservice Sept</div> <div>■ Access 2010 Introduction</div> <div>■ ACLS - Provider - 12 contact hours BRN</div> <div>■ Adult Patient</div> <div>■ Adult Patient</div> <div>■ Adult Patient</div> <div>■ Adult Patient</div> <div>■ Adult Patient</div> <div>■ Adult Patient</div> </div>	<div>Course ▼</div> <div> <div>■ Weapons of Mass Destruction - Chemical</div> <div>■ Weapons of Mass Destruction - Chemical</div> <div>■ Weapons of Mass Destruction - Chemical</div> <div>■ Weapons of Mass Destruction - Chemical</div> <div>■ UPDATED 2016 FSRMC RN 9N Transitional Care Unit Annual Competency</div> <div>■ UPDATED 2016 FSRMC RN 9N Transitional Care Unit Annual Competency</div> <div>■ Tuberculin Skin Test</div> <div>■ Tuberculin Skin Test</div> <div>■ Tuberculin Skin Test</div> <div>■ Tuberculin Skin Test</div> <div>■ Tuberculin Skin Test</div> <div>■ Tuberculin Skin Test</div> </div>

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

Use the letters for a quick 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.

Course Name Search

Weapons of Mass Destruction - Chemical True NJ---Kelemen Bldg---

Attendee Last Name Employee ID

Jones Joseph Learning Management System Video Adult Patient

## Approve / Deny Permission to Enroll In a Course

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

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

**Progress Report**

Overall Dashboard 64

Upcoming Courses 1 Online 24 Classroom

Courses Due 2 Online Due 0 Classroom Due

4 Course(s) Needing Approval

Pending Certifications 0 0 Due Soon / 0 Expired

Incomplete Evaluations 6

Employee Listing 25

Total Delinquent Users 1,506

**Session List** Displaying Pending

ID	Actions	Name	Employee ID	Course	Active
161	Enroll Deny	Smith Mario	msmith	CPR 2017	True
162	Enroll Deny	Smith Mary Anne	masmith	CPR 2017	True
163	Enroll Deny	Smith Sarah	ssmith	CPR 2017	True
164	Enroll Deny	Smith Jane	jsmith	CPR 2017	True

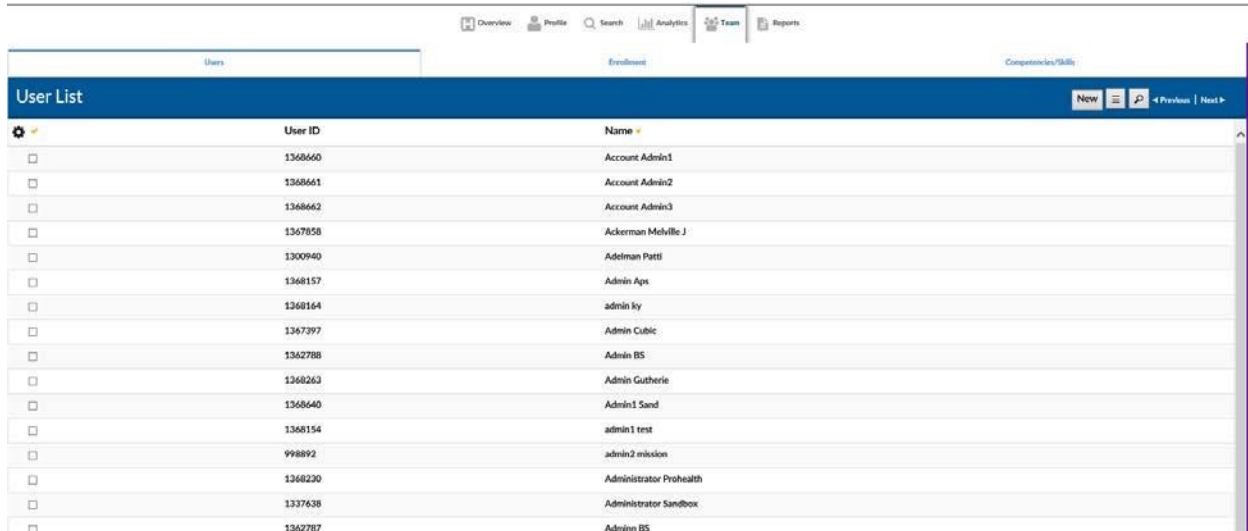
- Click the Enroll text link to approve the enrollment.
- Click the Deny text link to Deny the enrollment



## Team Tab

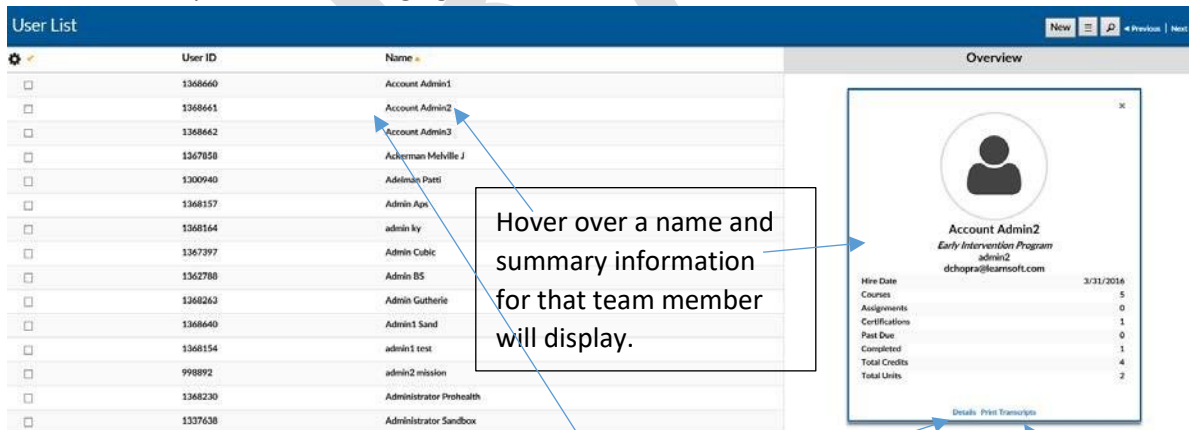
The **Team** tab provides the manager with access to **User List** information in full screen format. It also allows the manager to drill down into **Users**, **Enrollment** and **Competencies / Skills** (if enabled).

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




User ID	Name
1368660	Account Admin1
1368661	Account Admin2
1368662	Account Admin3
1367858	Ackerman Melville J
1300940	Adelman Patti
1368157	Admin Aps
1368164	admin ky
1367397	Admin Cubic
1362788	Admin BS
1368263	Admin Gutherie
1368640	Admin1 Sand
1368154	admin1 test
998892	admin2 mission
1368230	Administrator Prohealth
1337638	Administrator Sandbox
1362787	Adminm BS

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



User ID	Name
1368660	Account Admin1
1368661	Account Admin2
1368662	Account Admin3
1367858	Ackerman Melville J
1300940	Adelman Patti
1368157	Admin Aps
1368164	admin ky
1367397	Admin Cubic
1362788	Admin BS
1368263	Admin Gutherie
1368640	Admin1 Sand
1368154	admin1 test
998892	admin2 mission
1368230	Administrator Prohealth
1337638	Administrator Sandbox

**Overview**



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

Hire Date: 3/31/2016

Courses	5
Assignments	0
Certifications	1
Past Due	0
Completed	1
Total Credits	4
Total Units	2

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

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

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

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




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**

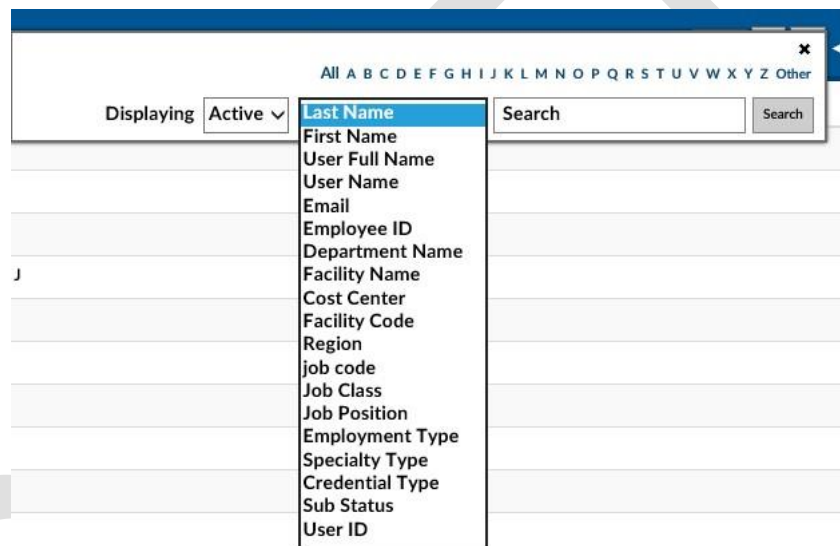
	User ID	Name	Division	Last Name	First Name	Job Position
<input type="checkbox"/>	1368660	Account Admin1	NJ--3 Medultra Plaza--Early Intervention Program A-3COOPER-00100784	Account	Admin1	
<input type="checkbox"/>	1368661	Account Admin2	NJ--3 Medultra Plaza--Early Intervention Program A-3COOPER-00100784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

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


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

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

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



**Enroll** team members from the User List by first checking the box to the left of the team member

names of those you wish to enroll then clicking on the Actions button  on the top right corner of

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

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Select Learning Object

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

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

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

Displaying Classroom Learning Object Name

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

**Add Learning Object**

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

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

[Overview](#) [Profile](#) [Search](#) [Analytics](#)

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

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



## Team Tab – Team Member Profile – Overview Tab

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

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

Overview Groups Enrollments Assignments Certifications Evaluations Competency Succession Development Details

**Personal Information**

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

**Employee Information**

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

## Team Tab – Team Member Profile – Buttons

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

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



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

USER DETAILS : ACCOUNT ADMIN3 - LEARNSOFT ID - 1368662

PRINT TRANSCRIPT EDIT AUDIT TRAIL EXIT

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

Available Learning Object Sessions

Learning Object	Status	Complete Date	Type	Start Date	Score	Assignment	Attachment	Actions
Centerline Walllist Demo Course	Canceled By Admin (Admin1 Sand)		Classroom Instruction Course	2/21/2016 7:00 AM				
General Orientation	Completed	3/31/2016	Classroom Instruction Course	3/31/2016 1:15 PM		Enrolled (Manager)		
cultural competency newbuild module2	Enrolled		On-Line Training Course			Enrolled (Manager)		<input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel
Harvard MM - Managing Upward	Enrolled		On-Line Training Course			Enrolled (Manager)		<input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel
Ebola Advanced Training	Enrolled		Classroom Instruction Course	9/28/2016 10:00 AM		Enrolled (Required By Manager Due:9/12/2016)		
General Orientation	Enrolled		Classroom Instruction Course	11/13/2016 8:00 AM		Enrolled (Manager)		
Test - MG	Enrolled		On-Line Training Course			Enrolled (Manager)		<input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel
CRE Exam B	Enrolled		On-Line Training Course			Enrolled (Manager)		<input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel
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 Course	8/7/2016 8:30 AM		Enrolled (Manager)		<input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel

Show Short List of Learning Object Sessions

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

USER DETAILS : ACCOUNT ADMIN3 - LEARNSOFT ID - 1368662

PRINT TRANSCRIPT EDIT AUDIT TRAIL EXIT

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

Available Learning Object Sessions

Learning Object	Status	Complete Date	Type	Start Date	Score	Assignment	Attachment	Actions
Centerline Walllist Demo Course	Canceled By Admin (Admin1 Sand)		Classroom Instruction Course	2/21/2016 7:00 AM				
General Orientation	Completed	3/31/2016	Classroom Instruction Course	3/31/2016 1:15 PM		Enrolled (Manager)		
cultural competency newbuild module2	Enrolled		On-Line Training Course			Enrolled (Manager)		<input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel
Harvard MM - Managing Upward	Enrolled		On-Line Training Course			Enrolled (Manager)		<input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel
Ebola Advanced Training	Enrolled		Classroom Instruction Course	9/28/2016 10:00 AM		Enrolled (Required By Manager)		
General Orientation	Enrolled		Classroom Instruction Course	11/13/2016 8:00 AM		Enrolled (Manager)		
Test - MG	Enrolled		On-Line Training Course			Enrolled (Manager)		<input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel
CRE 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 Course	8/7/2016 8:30 AM		Enrolled (Manager)		<input type="checkbox"/> Select <input checked="" type="checkbox"/> Cancel

Show Short List of Learning Object Sessions

Message from webpage  
Are you sure, you want to cancel this learning object session?  
OK Cancel

## 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	Employments	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.

[illegible]



## 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 displays the Learnsoft Search Tab interface. At the top, there is a navigation bar with links for Overview, Profile, Search (active), Analytics, Team, and Reports. Below this, the main content area is divided into two sections: Criteria and Result.

**Criteria Section:**

- Search for...** with a search button.
- Catalog** dropdown menu.
- Course Type** filters:
  - ☒ All
  - ☐ Classroom
  - ☐ Online
  - ☐ Event
  - ☐ Certification
- Advanced Search** link.

**Result Section:**

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

At the bottom of the results section, it shows "1748 Results (0 Selected) - Page 1 Of 110". There are also links for "Select All", "Unselect All", "Remove Selected", and "Remove Unselected".



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## Search – Predictive and Keyword search

The 'Criteria' section of the search interface includes a 'Search for...' text field, a 'Search' button, and a 'Course Type' filter. The filter is currently set to 'All' and includes options for 'Classroom', 'Online', 'Event', and 'Certification'. There is also an 'Advanced Search' link at the bottom.

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).

The 'Result List' section shows a list of course suggestions as the user types 'Get'. The suggestions include: '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', and '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' section displays a list of search results. Each result includes a course title, a description, and an 'Enroll' button. The results are: 'Getting Ready to Present' (On-Line Training Course), 'Getting Results without Direct Authority: Building Relationships and Credibility' (On-Line Training Course), 'Getting Results without Direct Authority: Influencing Your Boss' (On-Line Training Course), 'Getting Results without Direct Authority: Persuasive Communication' (On-Line Training Course), and 'Getting Results without Direct Authority: Reciprocity' (On-Line Training Course).

## Search – Advanced search

The screenshot shows the 'Criteria' section of the Advanced Search interface. It includes a search bar at the top, followed by several filter categories: Catalog, Course Type (with radio buttons for All, Classroom, Online, Event, and Certification), Instructor (with a list of names), Date Range (with radio buttons for Any Date and Specific Date, and input fields for Start Date and End Date), Facility, Training Vendor, Room, Topic, CE Hours, Accreditation, and Job Position. Each category has a dropdown arrow to its right. An 'Advanced Search' button with a blue arrow is located at the bottom right of the criteria section.

Criteria
Search for...
<b>Catalog</b>
<b>Course Type</b>
<input checked="" type="radio"/> All
<input type="radio"/> Classroom
<input type="radio"/> Online
<input type="radio"/> Event
<input type="radio"/> Certification
Advanced Search
<b>Instructor</b>
Blank Lisa K.
Davis Michelle Sue
Delaney Sandra
Durst Steve F
<b>Date Range</b>
<input checked="" type="radio"/> Any Date
<input type="radio"/> Specific Date
Start Date
End Date
<b>Facility</b>
- Select One -
<b>Training Vendor</b>
- Select One -
<b>Room</b>
- Select One -
<b>Topic</b>
- Select One -
<b>CE Hours</b>
- Select One -
<b>Accreditation</b>
- Select One -
<b>Job Position</b>
- 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	<a href="#">Enroll</a> <a href="#">Details</a>
	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	

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.

**LEARNING OBJECT INSTANCE**

ENROLL

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:

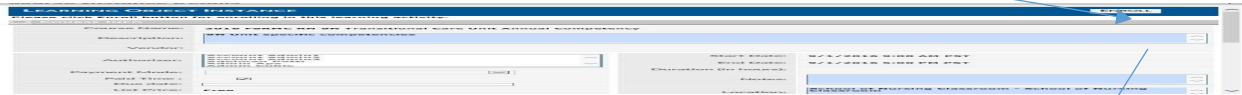
Location:

School of Nursing Classroom - School of Nursing Classroom

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

Search Attendees


**USER LOOKUP.**

Please select users by checking the checkbox and clicking "Add" button.

Last Name:  First Name:  Middle Name:  Employee ID:

**User List**

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

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

Due Date:  Comments:

**SMTWTFSS**

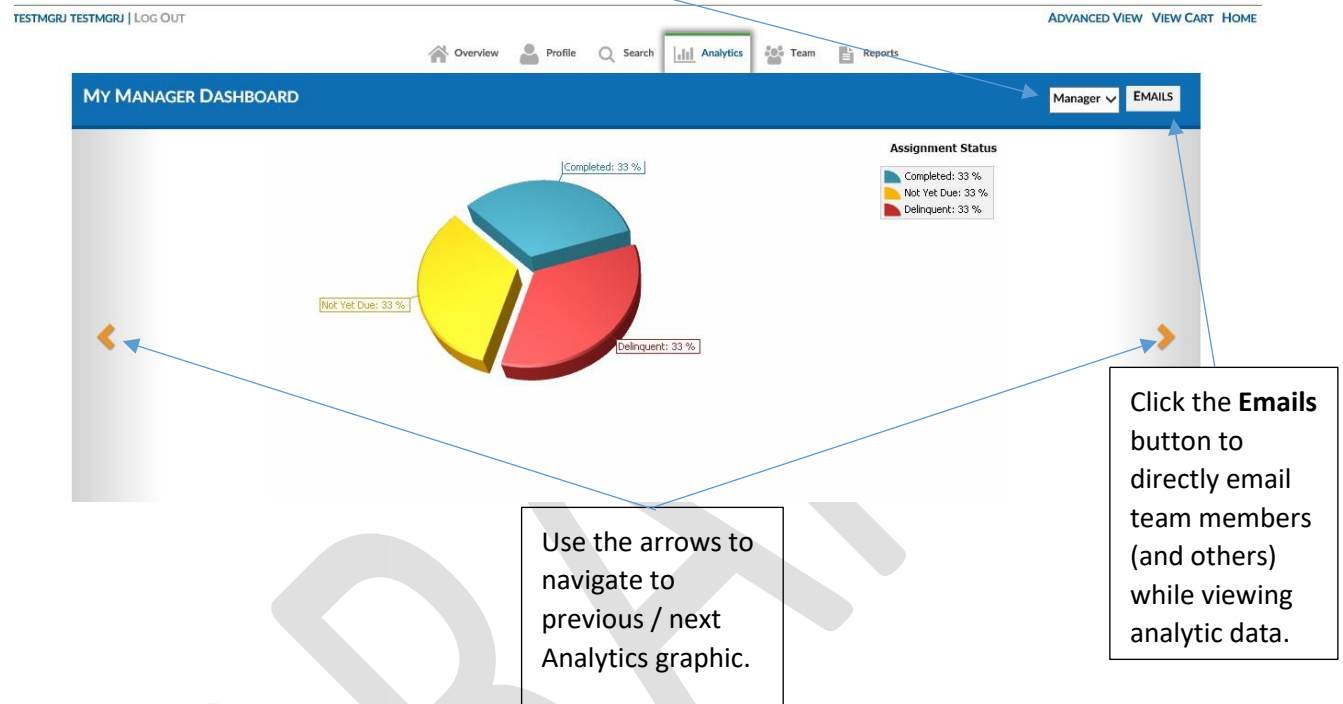
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today Close



## 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**.



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.*

TESTMGRJ TESTMGRJ | LOG OUT ADVANCED VIEW VIEW CART HOME

Overview Profile Search Analytics Team **Reports**

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

Report Name

Search

Search

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

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

Report List

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

REPORT : COMPLETION REPORT EXCEL EXPORTABLE

PDF EXPORT REPORT VIEW REPORT CANCEL

User Info Details

Any Date:

☒ Any Date
 ☐ Date Range

Start Date:

End Date:

Selector

Course:		Add Remove
Job Class:		Add Remove
Job Code:		Add Remove
Job Position:		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: ☒ Any Date ☐ Date Range

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

Start Date:

End Date:

December

2016

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



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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 PSRMC RN 9N Transitional Care Unit Annual Competency	
14542	CBO SBO Customer Service Go Live Training	
14594	COMPETENCY TEST COURSES	
14592	Course for Instructor Evaluation	

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

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

4. Click the "Add" button

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

Course: 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.*

# Learnsoft

## 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.



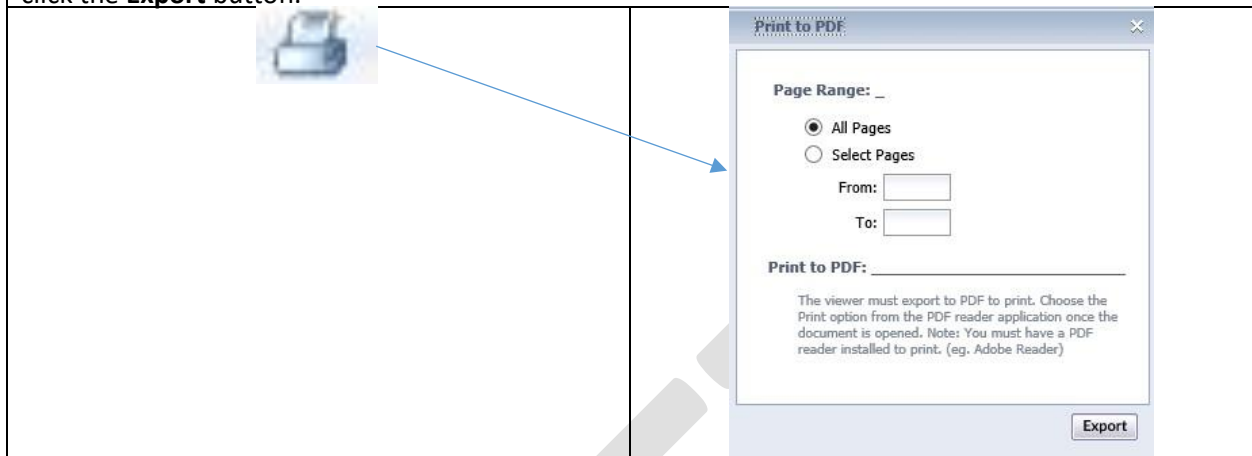
If selecting to **View Report**, a new window will pop-up with the Report Information.

The screenshot shows a 'Main Report' window. Annotations include:

- Enter text to search and click the search icon**: Points to the 'Find...' search bar.
- Dropdown to go to first / last page or type in page # and click enter**: Points to the '1 of 1' page indicator.
- 100%**: Points to the zoom level dropdown.
- Resize view**: Points to the maximize button.
- Drill down to deeper data levels (if available)**: Points to the left sidebar.
- Navigate to Next / Prev page (page 1 and 2 only)**: Points to the navigation buttons above the table.

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

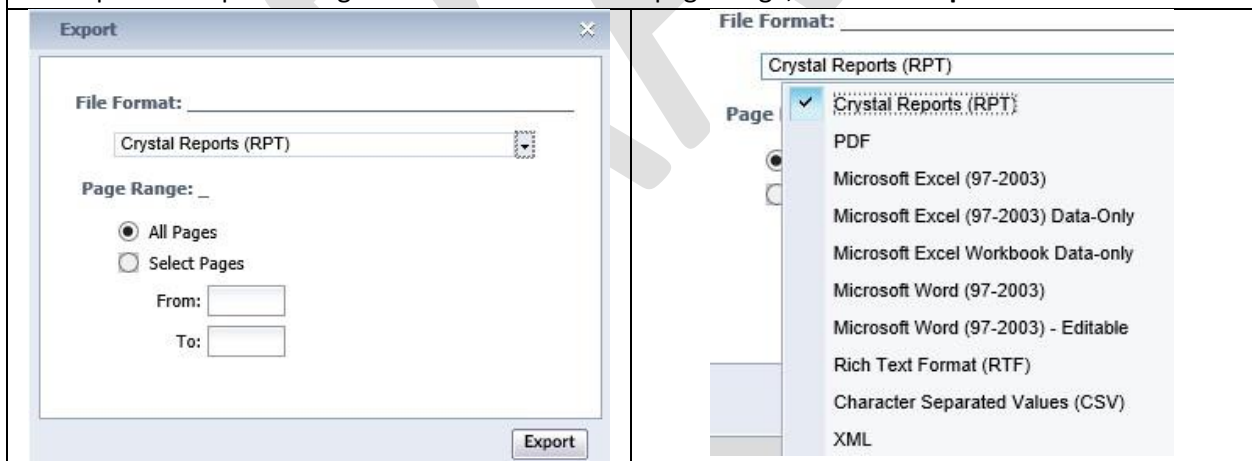
Click the **Print** icon to Print the Report to a PDF where it can be sent to your printer. Select pages and click the **Export** button.



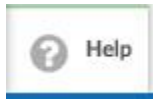
To export, click the **Export** icon...



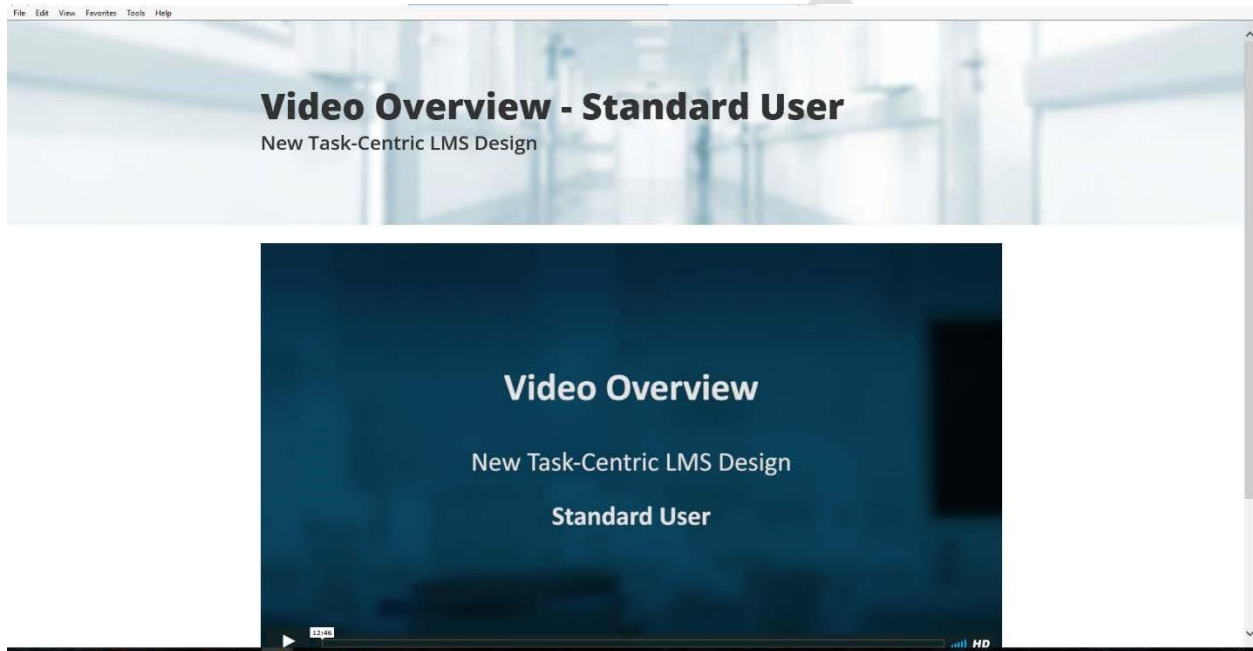
...to open the Export dialog. Select a file format and page range, then click **Export**.



## 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.

