UC LEARNING CENTER:

Manager / Supervisor Guide

UC Davis Campus
UC Davis Health

Introduction

The UC Learning Center is the web-based Learning Management System (LMS) used across the University of California for Systemwide training and development. Those who have direct reports identified in the UC Learning Center will receive the Manager Role, in addition to the standard Learner Role. In some cases, individuals may be given the Manager Role if they have been identified as needing access to manage the training of those who are not their direct reports.

With the Manager Role, you can:

- View training history and status of assigned training of direct reports or viewable users
- View direct reports or viewable users current training schedule
- Register direct reports or viewable users for activities
- Assign activities to direct reports or viewable users

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Logging into the UC Learning Center

Log in at lms.ucdavis.edu using your UC Davis Login (Kerberos).

Navigation

Homepage

When you first login to the UC Learning Center, you will see the homepage. Here you can launch activities you are currently registered in, navigate to your training schedule or transcript, and use search features to locate activities you wish to take. These will all be reflected on your own account. You can also get information about your direct reports.
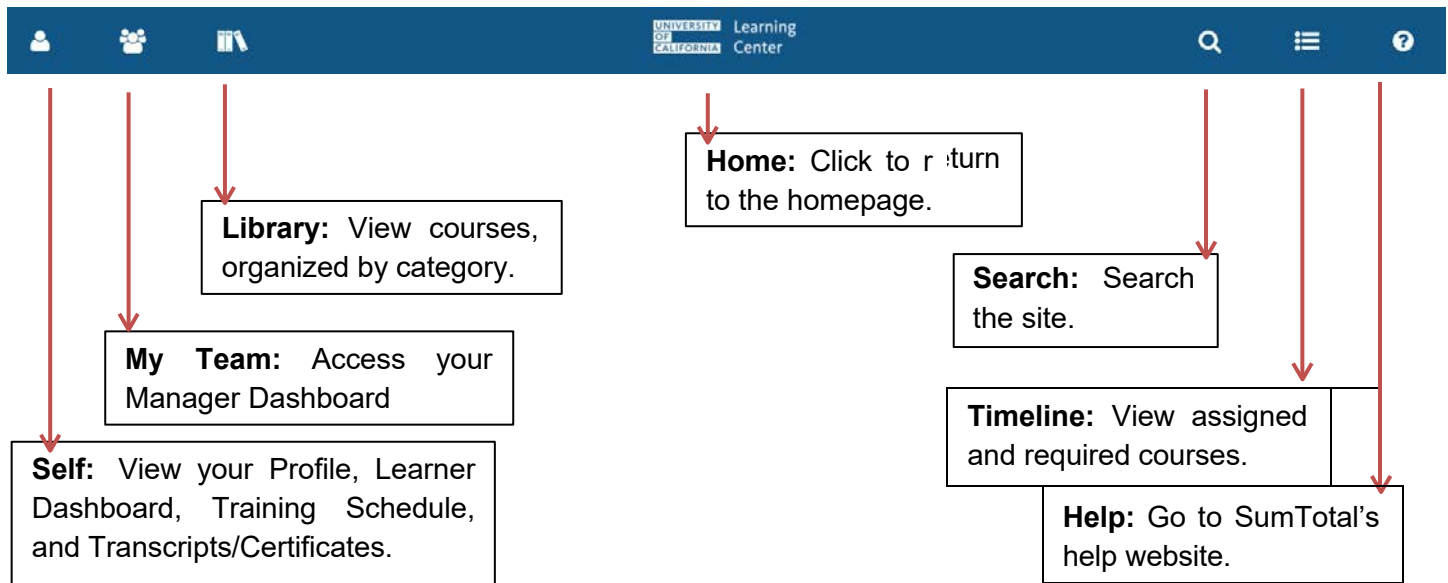
The Manager view is an enhanced version of the Learner view. For more information on Learner access, refer to the Learner Guide.

- **Manage My Registrations:** View your Training Schedule, where you can see both upcoming in-person activities you have registered to attend, as well as any online activities you are currently in progress with.
- **My Learner Dashboard:** Access your required training and recently launched training
- **Transcript & Certificates:** View transcripts for any courses you have completed in the UC Learning Center, as well as any training you have self-reported [delete self-reported training
- **Find a Course:** Search for a course.
- **How To:** Short YouTube instructional videos
- **Support:**
    - UC Davis Campus:
        - Contact UC Davis Staff Development and Professional Services at sdps@ucdavis.edu for assistance with the UC Learning Center.
    - UC Davis Health:
        - If you have any issues or problems with UC Learning Center, please submit a Support Request through Employee Self Service or call (916) 734-HELP (4357).

Top Menu

The Top Menu will appear on every page. Hover over each icon to see where they will take you. You may not see every icon, depending on your permissions.

Home: Click to return to the homepage.

Library: View courses, organized by category.

Search: Search the site.

My Team: Access your Manager Dashboard

Timeline: View assigned and required courses.

Self: View your Profile, Learner Dashboard, Training Schedule, and Transcripts/Certificates.

Help: Go to SumTotal's help website.

Using the Manager Tools

Once you have been identified as the manager of a user in the UC Learning Center, you will automatically have the **My Team** icon appear in the Top Menu. This will give you access to a **Manager Dashboard.**
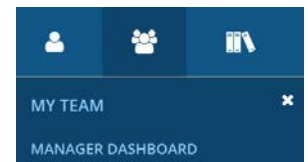
Manager Dashboard

When you navigate to your **Manager Dashboard**, you will be able to see:

- A snapshot of your current exception report, which shows the overall status of your managed users' assigned training.
- A list of your managed users with the status of their individual assigned training.
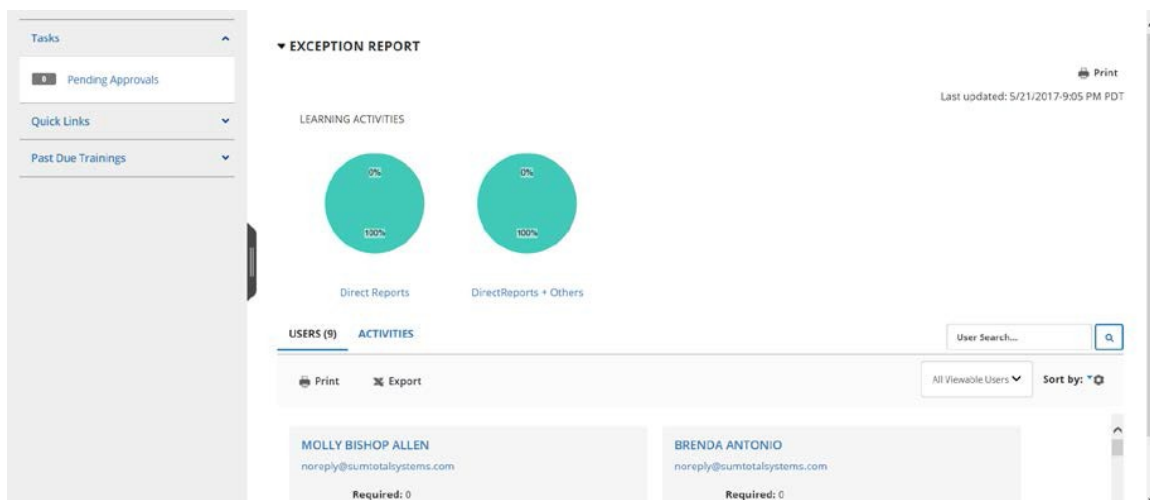
Note: Manager Dashboard is updated nightly, so if one of your users completed training after the last update, it will not appear in this view until the next update. However, the user's training transcript and schedule are displayed in real time and will show you their latest status.

View Managed Users

In the Manager Role, you have the ability to view information about your managed users and the progress of their assigned activities.

Your viewable users will all be displayed in tiles on your **Manager Dashboard**. You can scroll through these tiles to locate a particular individual or you can search the user by name, or sort in ascending or descending order (by name, assignment progress, etc).

You will automatically see all users you have been given access to view, either as your direct reports or as managed users whose training you are responsible for managing. If you manage more users than just direct reports, you can change your view from **All Viewable Users** to **Direct Reports** if you wish to only view your direct reports.

View Status of Assigned Training

When you first enter your **Manager Dashboard** you will see an overview of your managed users and the status of their assigned training. The **Exception Report** at the top will show you the percentage of compliance your managed users are currently at for all training assigned to your managed users. For each individual, you will see the overall status of their currently assigned training. Click the blue **Incomplete** button to see a more detailed report. Remember, you can also sort this list by process.

Assigned Training by Activity

You can also see which trainings are assigned to your managed users and the overall completion of the training.

Switch from the **Users** view **Activities** view to see all the activities that are currently assigned to your managed users. You will now see how many are still required to complete each training and the overall percentage of completion.

Click on the blue **Users** button to see who is still required to complete the training.
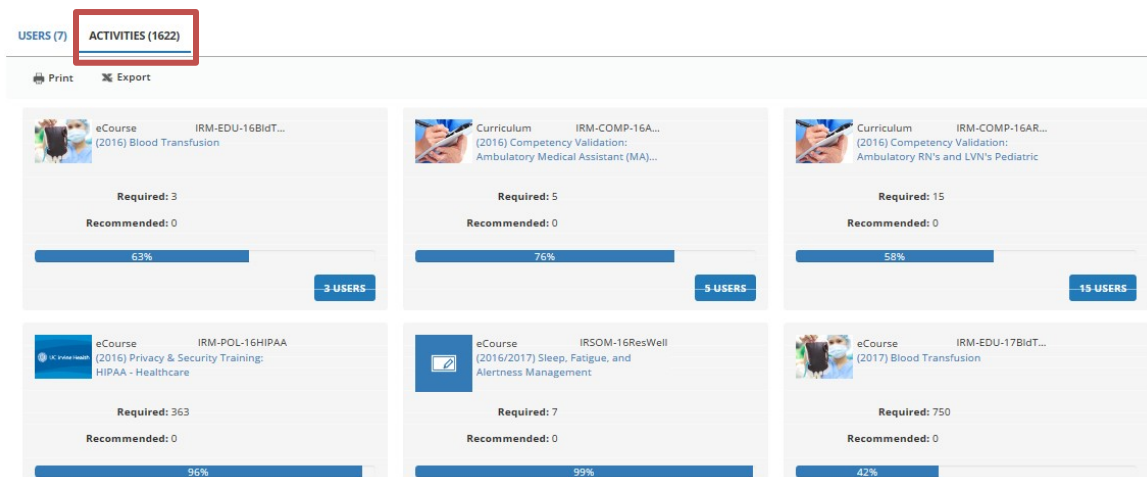
Individual Reports

To view a detailed report for an individual user:

1. Locate the user you wish to find out more information about.
2. Click on the blue **Incomplete** button.

This will show you an overview of the user's currently assigned training, including a list of all training that has been assigned, the due date for each training, and their overall progress in completing all assigned training.

1. Clicking the **Title** of the course will show you more information about the training.
2. Using the menu bar on the left side, you can filter the training to show only what assignments are **Overdue** or what has been **Completed**.
3. You will see when the information was **Last Processed** in the top right corner.
4. Clicking the **Close** button will take you back to the Manager Dashboard.

Training Analysis

Another way to view a user's assigned training is to go to that user's Training Analysis page.

1. Locate the user you wish to find out more information about in your list of direct reports or viewable users.
2. Click the drop down arrow next to the white **Profile** button.
3. Click **Training Analysis.**
4. This will launch **Emulation mode**, which allows you to view Learning details about your managed users. You know you are in emulation mode by the orange "eye" in the top menu bar where the "Self" icon would typically display.
5. The page provides an overview of the user's currently assigned training, the due date for each training, and current assignment status. Click the **View** drop down menu to see additional information.

Training Transcript

To view all completed training for a managed user, you can view their training transcript.

1. Locate the user you wish to find out more information about using the User Search function.
2. Click the drop down arrow next to the white **Profile** button.
3. Click **Training Transcript.**
4. This will launch **Emulation mode**, which allows you to view Learning details about your managed users. You know you are in emulation mode by the orange "eye" in the top menu bar where the "Self" icon would typically display.
5. You will be taken directly to that user's transcript. Select the timeframe you wish to review using the year or date range filters. Note the default view is for one year.
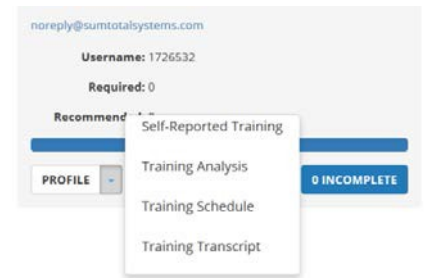
You can view the transcript or individual certificates of completion and export them to PDF.

To export the training transcript to PDF:

1. Click **Export to PDF** in the top right corner
2. Click **File** to download the PDF, and the **OK.**
3. The PDF will open in a new window.
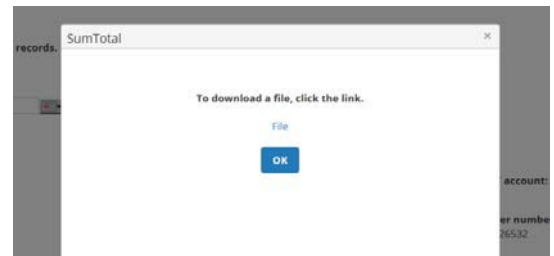
To export individual certificates to PDF:

1. Click the certificate logo next to the course name.
2. Click **Export to PDF** and follow the steps above.

ACTIVITIES

	Activity	Estimated Credit Hours	Start Date	Completion Date	Expiration Date	Score	Grade	Attended Duration	Code
	eCourse: UC Cyber Security Awareness Training - Refresher		12/22/2016	12/22/2016	12/22/2017			Days: 0, Hours: 0, Minutes: 31, Seconds: 17	SECURITY-RE-OP-ECO
	ILT Class: Open Session Staff Training 2016-17 Goal Setting		11/10/2016	11/10/2016					UCOP_GS_Staff1617_OP110616
	eCourse: UC HIPAA Privacy and Security Training		7/18/2016	7/18/2016	7/18/2018			Days: 0, Hours: 0, Minutes: 12, Seconds: 20	OP_HIPAA
	eCourse: UC Sexual Violence and Sexual Harassment		7/18/2016	7/18/2016	7/18/2018	100	100	Days: 0, Hours: 2,	AB1825-OP-ECO-2016

View Training Schedule

You can view a managed user's training schedule to see their current registrations and progress.

1. Locate the individual you wish to view.
2. Click on the drop down arrow next to the **Profile** button and select **Training Schedule.**
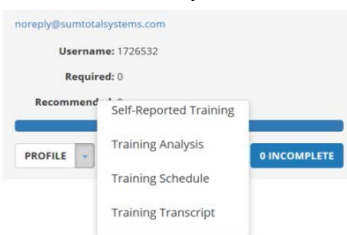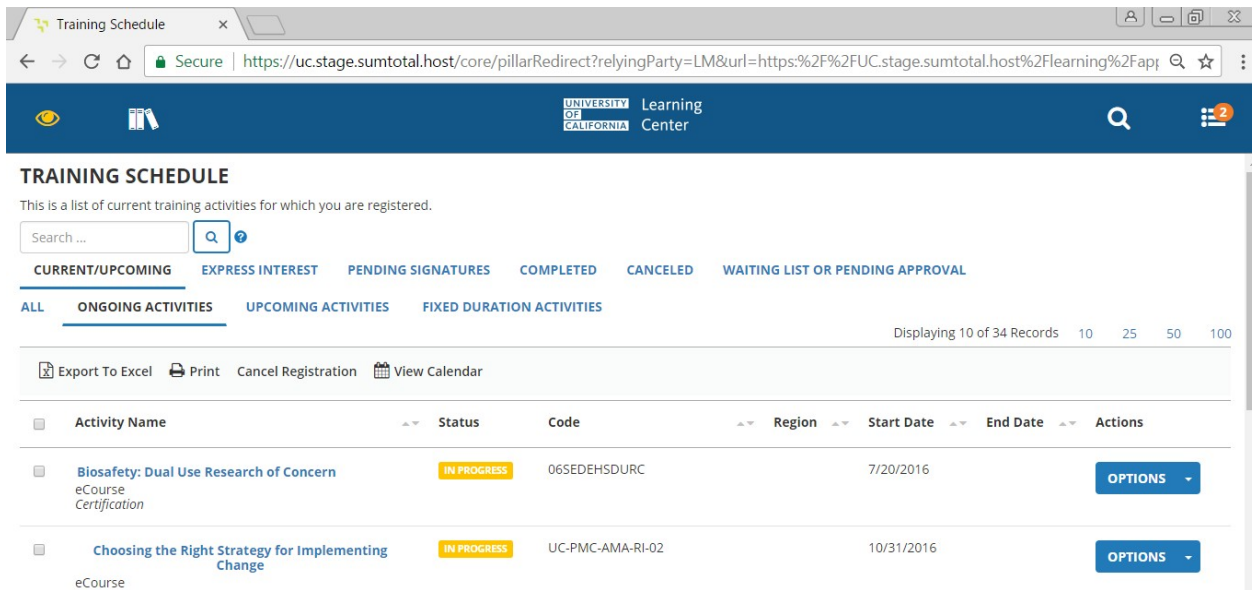
3. This will launch **Emulation mode**, which allows you to view Learning details about your

managed users. You know you are in emulation mode by the orange "eye" in the top menu bar where the "Self" icon would typically display.

4. Now you can see that user's registrations and other canceled, in progress or completed training.


Register Users

A manager has the ability to register their managed users for courses. It is recommend to register users for in-person training and assign online training. To register managed users:

1. Locate the activity you wish to register by using the **Catalog** or **Search** functions.
2. Click on the drop down arrow next to the **Select** button and select **Register Others.**
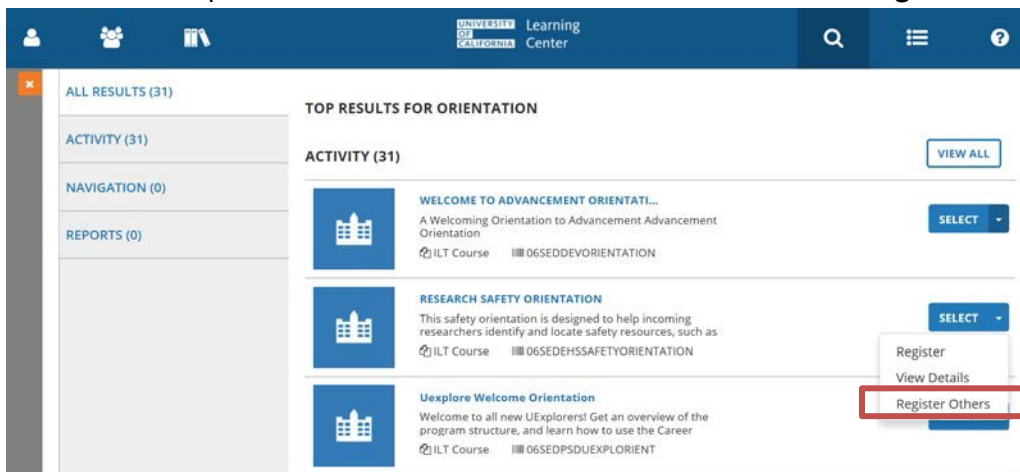
3. If this is online course, click **Continue** to add users. If this is an in-person training, you will need to select the offering you wish them to attend first before you can click **Continue.**

4. Click **Add** under Available Users to locate the users you wish to register.
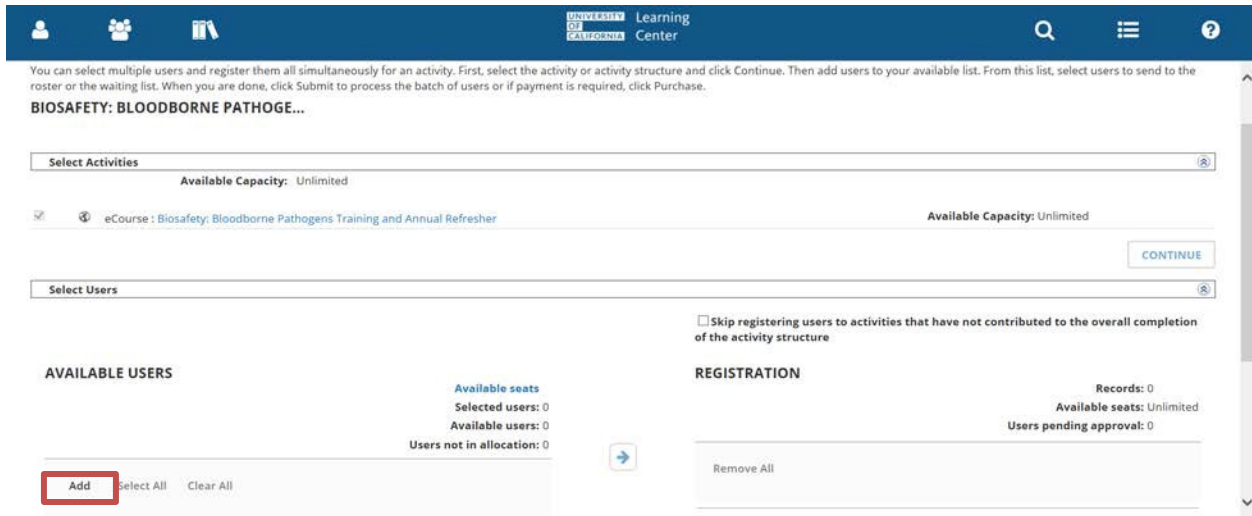
5. There are several options to narrow down the users you wish to add. As Manager, the only option that will be relevant is **Select Viewable Users.**
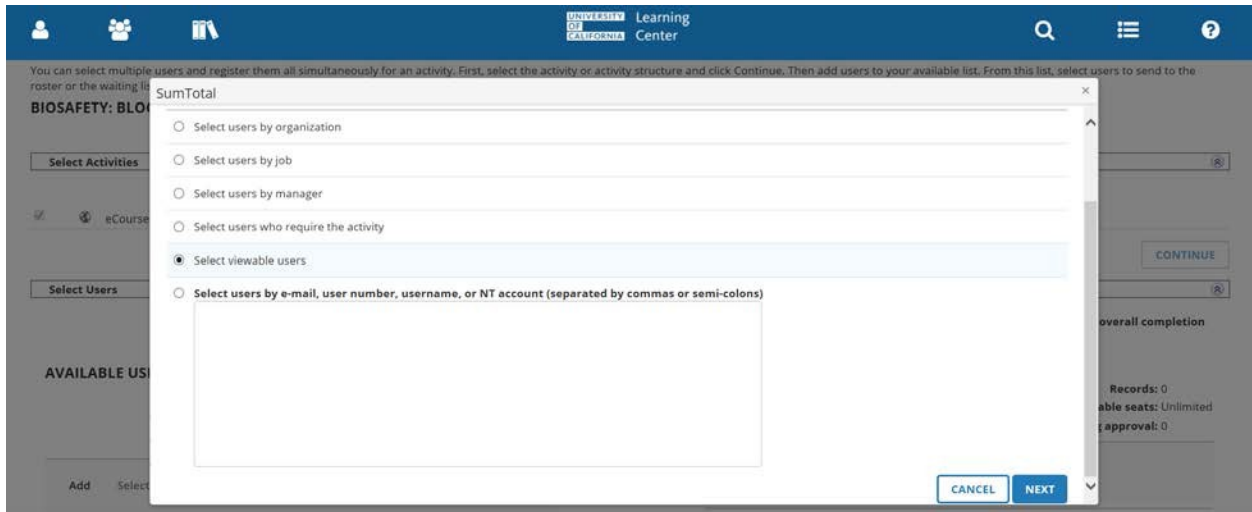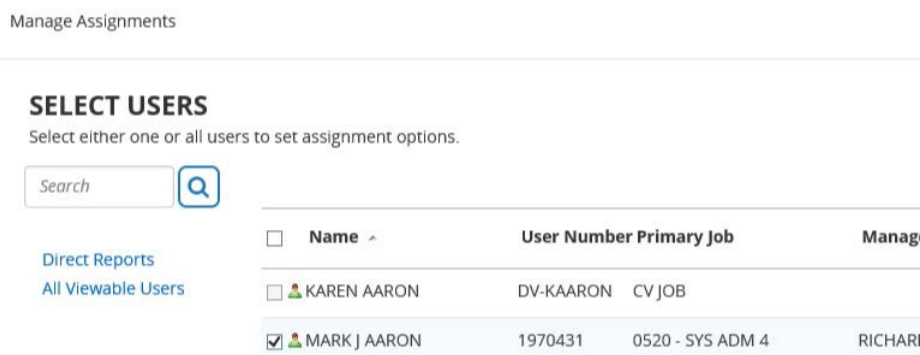

6. Click **Next.** You now have the option to:
   - Type a user's name in the search box and click the **Arrow** button.
   - Browse the list of users for individuals you wish to register.
   - Click **Select All** at the bottom of the page to select all active users or select the top box to select all users on the current page.

7. Select the **check box** next to the users/users name that you wish to register. Click **OK** at the bottom to continue.
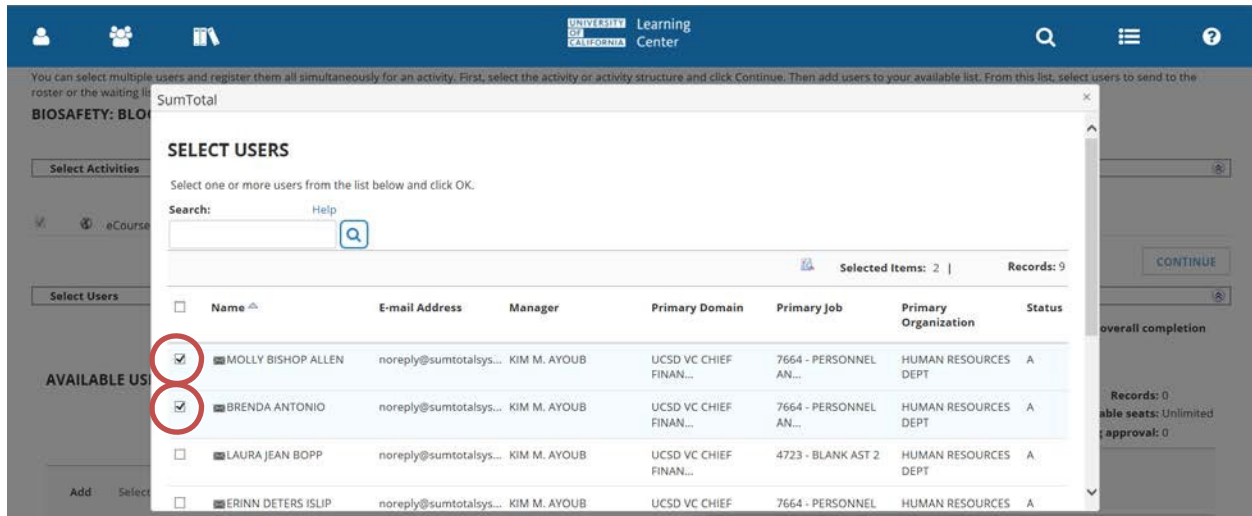
8. Click the **Top Arrow Button** to move the selected users over to Registration.
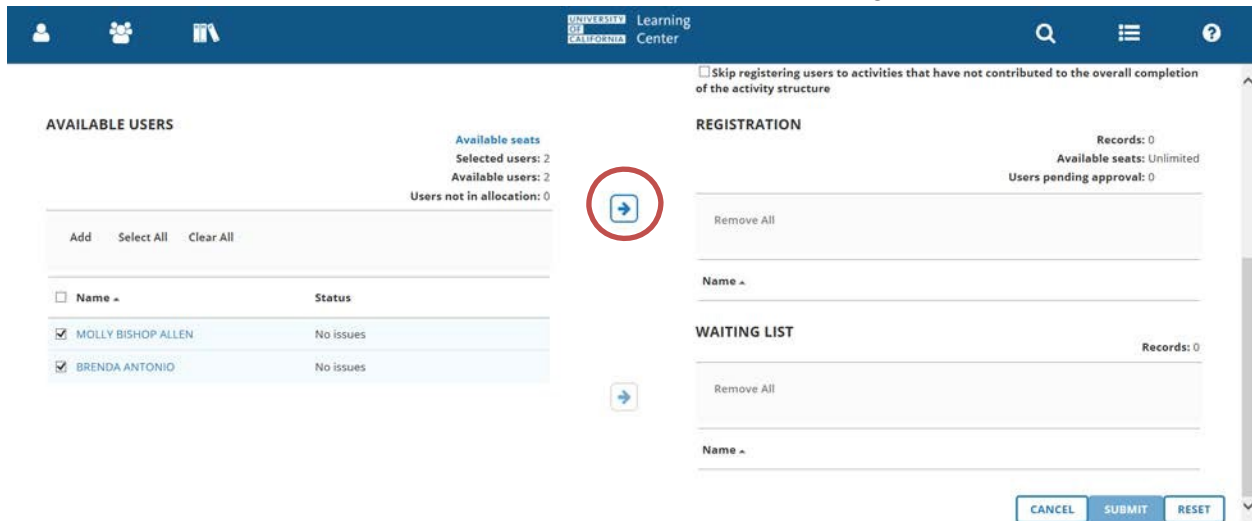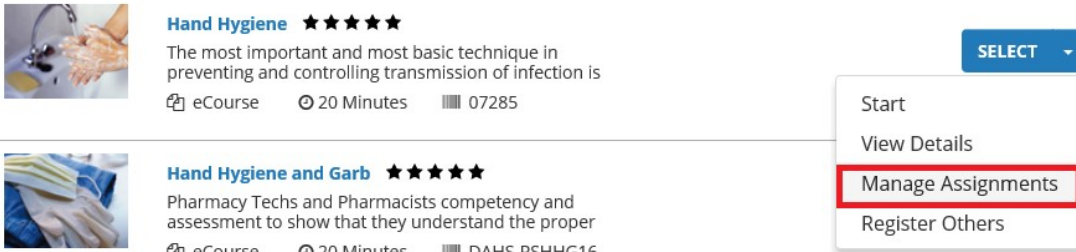
9. Click **Submit** once all users you wish have been moved over.
10. The users are now registered for the activity.

Note: If the activity is in-person they will receive an email notification of their registration. If the activity is online there is no registration notification, so you may want to inform them they need to complete the training.

Manage Assignments
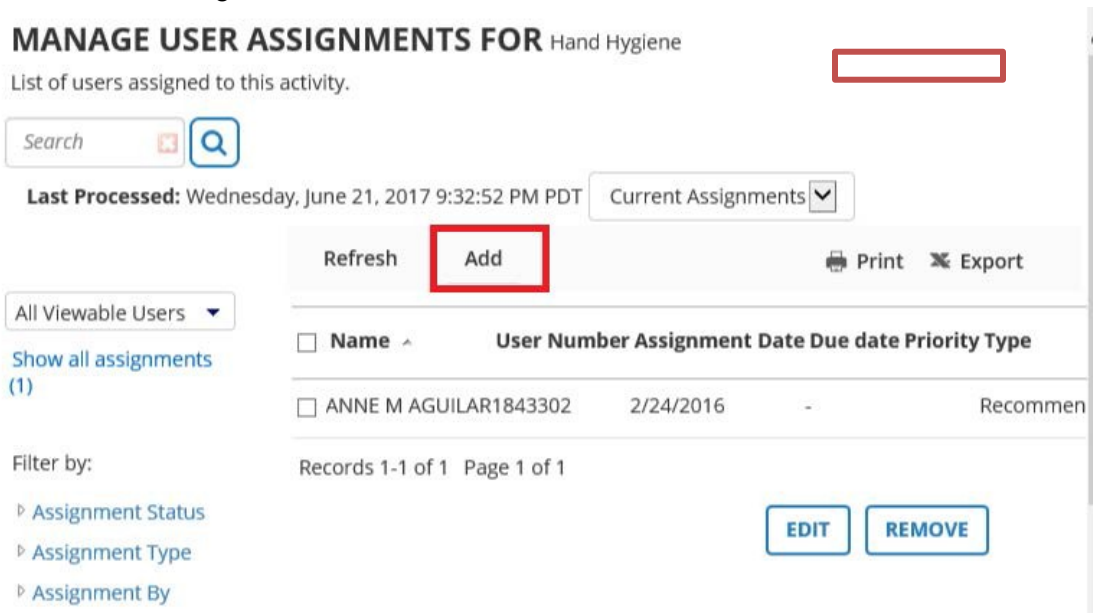
A manager has the ability to assign their managed users for courses. Manager assignments are recommended for individual assignments only. To assign managed users:

1. Locate the activity you wish to register by using the **Catalog** or **Search** functions.
2. Click on the drop down arrow next to the **Select** button and select **Manage Assignments.**

3. To add a new assignment, click **Add.**

4. Select the user(s) you wish to assign the activity to (Note: You may need to click All Viewable Users if you do not have Direct Reports) and click **Next**.

5. Set the **Type** (Required or Recommended) and choose a **Start Date**

Manage Assignments

EDIT ASSIGNMENTS FOR Hand Hygiene

Select either one or all users to set assignment options.

Select: All | None   ⇅ **Sort by:** Name ▼

MARK J AARON   ⊗
Type: Recommended | **Status:**Assigned
Due Date: No Due Date

Assignment Options:
Selected users (1)

Type:
⦿ Required
○ Recommended

☐ Ignore Previous Completions
[   ] 📅▼

Start Date:
⦿ Today
○ [   ] Days from today
○ On [   ] 📅▼

Time zone:
[UTC   ▼]

Priority:
[None ▼]

6. Scroll down to set the **Due Date** and click **Apply to Selection**, then click **Done**.

Due Date:
○ No Due Date
⦿ Within [30] Days
○ By [   ] 📅▼

Time zone:
[UTC   ▼]

Assignment Notes:
[   ]

Status:
[Assigned ▼]

[**APPLY TO SELECTION**]

[CANCEL] [BACK] [DONE]

7. Under the **Manage Assignments** screen, you can **Edit** or **Remove** the assignment

Manage Assignments

MANAGE USER ASSIGNMENTS FOR Hand Hygiene
List of users assigned to this activity.

[Search] 🔳 🔍

Last Processed: Wednesday, June 21, 2017 9:32:52 PM PDT   [Current Assignments ▾]

All Viewable Users ▾		Refresh Add			🖨 Print ✖ Export	
Show all assignments (2)	☐	Name ⌃	User Number	Assignment Date	Due date	Priority Type
	☐	MARK J AARON	1970431	6/21/2017	7/22/2017	Require
Filter by:	☐	ANNE M AGUILAR	1843302	2/24/2016	-	Recomn
▷ Assignment Status	Records 1-2 of 2 Page 1 of 1					
▷ Assignment Type						
▷ Assignment By					EDIT REMOVE	

Note: Users should receive an assignment notification later that night. If you need to assign training to staff based on job code / department and want to include transfers/new hires in the future, please contact the appropriate training group of the activity to setup an **Audience** to make the assignment.


Accessing Advanced Reporting- CAMPUS

In preparing reports, supervisors can confirm their employees' training status in a few ways. The easiest is to run an "UCD Campus Assigned Training Status Report" through their Advanced Reporting dashboard in the UC Learning Center (http://lms.ucdavis.edu). There are several report templates in the UCD Campus Folder to choose from.

Once you are logged into http://lms.ucdavis.edu click the Self icon (upper left-hand corner of screen), click on Reporting, and then click on Advanced Reporting.

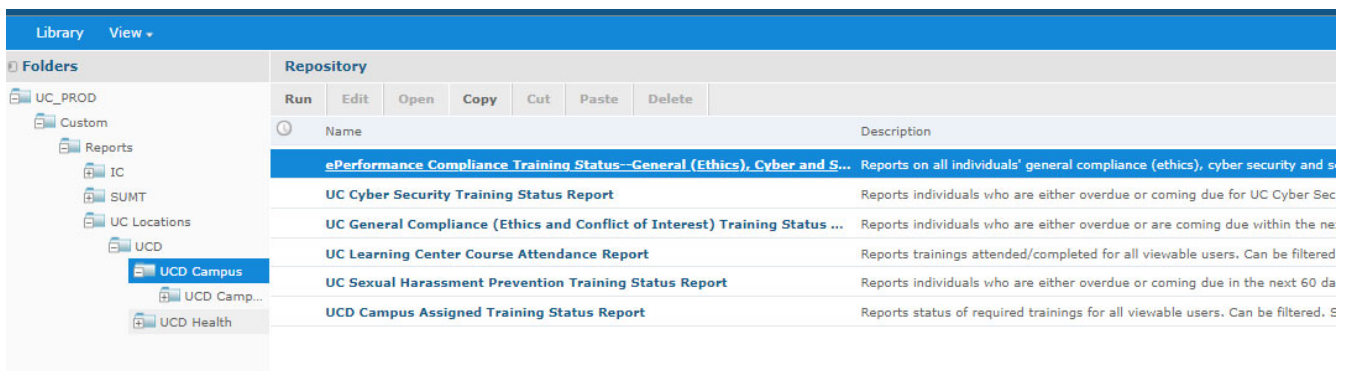**Your screen should now display the Advanced Reporting dashboard:**
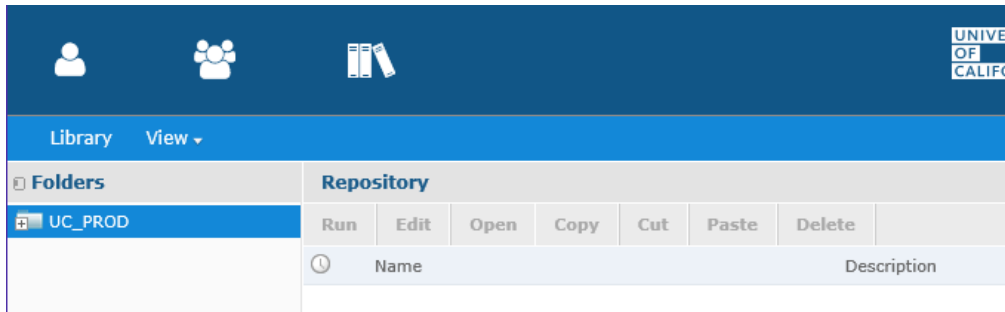
Expand the folder list on the left-hand side of your screen to reach the UCD Campus folder:

UC_PROD > Custom > Reports > UC Locations > UCD > UCD Campus

Click the title of the report you wish to run:

- **UCD Campus Assigned Training Status Report**
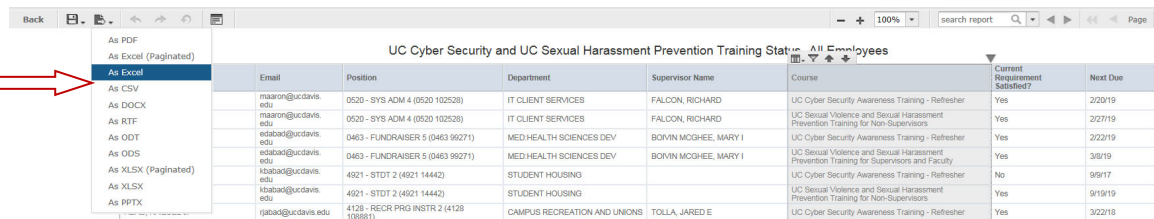 Shows all individuals' assigned training status. This guide uses ePerformance Compliance Training Status—Cyber and Sexual Harassment Prevention Report as an example.

EXAMPLE: ePerformance Compliance Training Status—Cyber and Sexual Harassment Prevention:

Once your report appears, you can export it or Sort/Filter within the LMS report

To Export:

Click the export icon and choose the desired format (e.g. Excel).

To Sort/Filter within the LMS Report:

When you run the report it will provide all data. Click on the Course Name or Course Code, or any other column title to bring up sort/filter options:
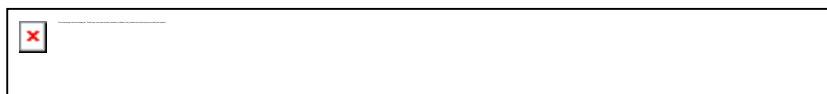
Click the Filter icon to bring up filter options:
This example uses a class as the filter subject

After you click "Show Only Rows Where"… You may either use "Contains" or "Equals" and you can use your appropriate title in place of Animal Care and Use 101 (OR you can use a date, etc)

If you wish to filter before you export to excel, you can Right click Export Icon, and then as XLSX

(Once you have exported to Excel, you can sort and filter by course name or date, or even last name to see all completions for your supervised employees)

Return to Report List

If you would like to run other reports, select View > Repository to return to the report list.

Reports you can run include:

- **ePerformance Compliance Training Status—Cyber and Sexual Harassment Prevention**
  Shows all individuals' cyber security awareness and sexual harassment prevention status training status. (Best for identifying mandatory training compliance for Pay4Performance program.)
- **UC Cyber Security (Initial and Refresher) Training Status Report**
  Shows individuals who are either overdue or coming due for cyber security awareness training.
- **UC Learning Center Course Attendance Report**
  Use this report if you would like to view all training completed by your employees. (Can be filtered to only display trainings completed during a given time period.)
- **UC Sexual Harassment Prevention Training Status Report**
  Shows individuals who are either overdue or coming due for sexual harassment/sexual violence prevention training.
- **UCD Campus Assigned Training Status Report**
  Use this report to view the status of all training assigned to your employees.

Exit Advanced Reporting

Click the "University of California Learning Center" logo in the top center of your page to return to your UC Learning Center homepage:

Contacts

UC Davis Campus:

- **Staff Development and Professional Services**
  sdps@ucdavis.edu
  530-752-1766

UC Davis Health:

- **Human Resources Training & Development**
  HS-T-D@ucdavis.edu
  916-734-2676

- **Center for Professional Practice of Nursing**
  hs-cppn@ucdavis.edu
  916-734-9790

- **Information Technology Education**
  hs-itedu@ucdavis.edu

- **Help Desk**
  916-734-HELP (4357)