The University of York Learning Management System (LMS)

Departmental Training Officer Guide

The purpose of this document is to provide a guide for a Departmental Training Officer (DTO) to use the LMS. It should be used in conjunction with the Staff Member Guide and the Manager Guide.

The first section of the Staff Member Guide describes the layout of the pages, what the buttons and icons are and the drop down menus. The second section describes simple functionality, such as booking a course using the calendar.

The pages in the Manager Guide describe the Manager specific functionality, such as approving and assigning learning.

The pages in this document show how to create custom reports for your department.

The last page describes what the icons and terminology used in the LMS, which may be different to what is commonly used within the University.

Should you have any questions or require any help with the LMS, please contact:

learning-development@york.ac.uk ext. 4888
DTO Specific

Custom Reports

Select Custom Reports from the drop down menu.

You will be taken to the Custom Reports page.

Custom Reports

- Click "All folders" on the left to view all your reports. Click any folder to view reports within that folder. Right click a folder to view options for it. Drag and drop folders to change the tree.
- Use the "New" button to create a new folder or report. Drag a report to a folder and drop it there to move it to that folder.
- To view data for the last three runs of a report, click "History" in the Actions column. For the most recent data, click "Refresh" to process the report and wait for processing to complete.
DTO Specific

Custom Reports

Layout

- Click "All folders" on the left to view all your reports. Click any folder to view reports within that folder. Right click a folder to view options for it. Drag and drop folders to change the tree.
- Use the "New" button to create a new folder or report. Drag a report to a folder and drop it there to move it to that folder.
- To view data for the last three runs of a report, click "History" in the Actions column. For the most recent data, click "Refresh" to process the report and wait for processing to complete.

- Folder Selector
- Reports
- Report Filters
- Help Video
- New Report Type Selector
- Action Selector
DTO Specific

Custom Reports

Drop Down Buttons

The drop down on the new button allows you to select the appropriate reports.

Click on the question mark to play a help video, click on the Play Video button to start.

The drop down on the action button allows you a number of functions shown here.
DTO Specific

Custom Reports

Example:

Here is a report on Diversity in the Workplace Learning.

The help video gives a good demonstration of how to create a custom report.
Points to Note

There are some terms within the LMS which are generic and cannot be changed to be University of York specific. Here is a list of terms used within the LMS.

**Event** – A learning event or course, usually in a classroom (e.g. Administrators Forum or Time Management)

**Session** – an instance of an event (a specific occurrence of an event e.g. Time Management on 25th February)

**Part** – This is when a learning event is over more than one day e.g. Project Management Part 1 on 5th June and Project Management Part 2 on 15th June

**Curriculum** – A number of learning assets (could be videos, documents or courses, etc.) grouped together (e.g. Leadership in Action)

There are a number of pages that have the term “training” where the University would use “learning” There is currently an investigation underway to see if this can be changed.

**Icons within the LMS (which may not be visible to all staff):**

- Search (opens a new window)
- Delete
- Print
- Export to Excel
- Refresh
- View Details
- Date
- Search

**Icons in the “Browse for Learning” Page:**

- Online Learning Course
- Event
- Video
- Curriculum

**Learning Status:** In some departments, all events must be approved by a line manager or designated approver. Other departments require no approvals. All on-line learning does **NOT** require approval across the University

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