

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.

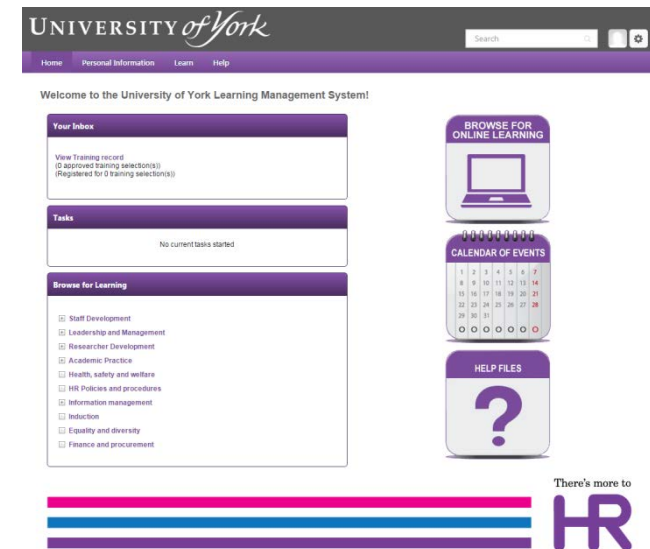
The pages in the Manager Guide describe the Manager specific functionality, such as approving and assigning learning.

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

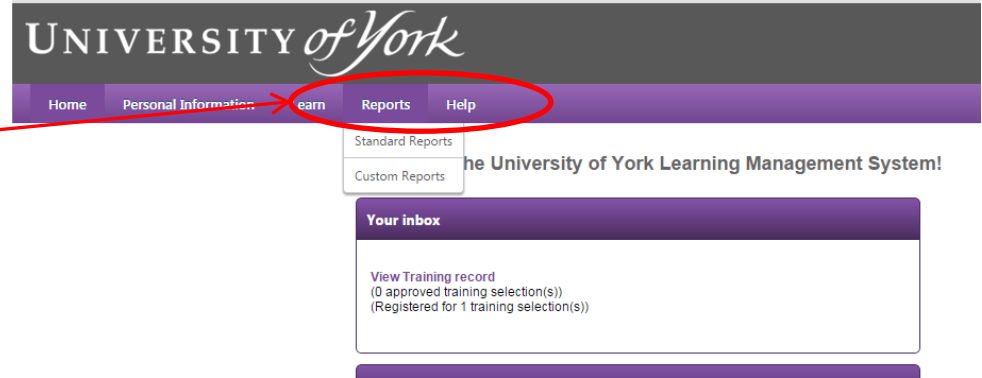


DTO Specific

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.

New ▾

Folders

📁 All folders

Custom report

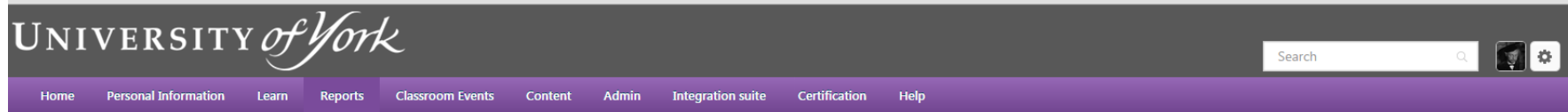
Created by me ▾ Ran anytime ▾ 🔍

Title	Type	Creator	Folder	Last Run	Actions
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DTO Specific

Custom Reports

Layout



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.
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- 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.

Help Video →

New Report Type Selector →

The screenshot shows the 'Custom reports' interface. On the left is a 'Folders' sidebar with 'All folders' and 'Training Report'. The main area contains a search bar, filters for 'Created by me' and 'Ran anytime', and a table of reports. The 'Action' column has dropdown menus. Red circles and arrows highlight these elements.

Title	Type	Creator	Folder	Last Run	Action
active users prod	User Report	AIKMAN, ALLAN	All folders	22/12/2014	[dropdown]
ASO	Training Report	AIKMAN, ALLAN	All folders	19/01/2015	[dropdown]
bespoke	Training Report	AIKMAN, ALLAN	All folders	19/01/2015	[dropdown]
DECS Manager List	User Report	AIKMAN, ALLAN	All folders	19/01/2015	[dropdown]
Session ID Production	Training Report	AIKMAN, ALLAN	Training Report	22/12/2014	[dropdown]

Folder Selector

Reports

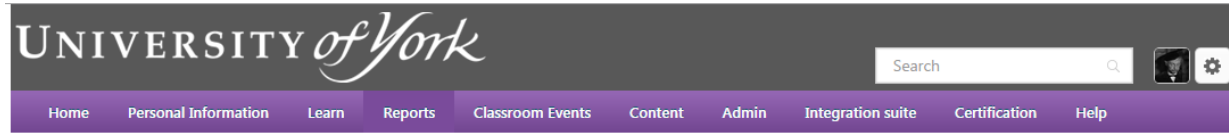
Report Filters

Action Selector

DTO Specific

Custom Reports

Drop Down Buttons



Custom Reports

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

Folders

- All folders
- Training Report

Custom report

Title	Type	Created by	Folder	Last Run	Actions
active users prod	User Report	AIK			
ASO	Training Report	AIK			
bespoke	Training Report	AIK			
DECS Manager List	User Report	AIKMAN, ALLAN	All folders	19/01/2015	
Session ID Production	Training Report	AIKMAN, ALLAN	Training Report	22/12/2014	

Cornerstone

How to build a custom report

Play video

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

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

New

- New folder
- Training plan report
- Training record Report
- Training Report
- User Report

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

Last Run	Actions
22/12/2014	
19/01/20	Excel
19/01/20	Print
19/01/20	Text
22/12/20	History
	Edit
	Copy
	Refresh
	Delete

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.

Diversity Report

Drag and drop fields to the Preview table to build your report. Click the refresh button to update the data in the table after you make any changes.

Save Close

Training record Report All folders

Fields

Show: Select options

- T Training prerequisites
- # Training price
- T Training Reference Nu...
- 📅 Training reg. deadline
- T Training skills
- 📅 Training start date
- T Training Status
- T Training Title
- T Training Topics
- T Training Trainer
- T Training Type
- T Training vendor
- T Training version
- T Transaction no-show c...
- T Transaction Withdewa...
- 👤 User session selection...
- T Vendor location adres...
- T Vendor location adres...
- 👤 Waiting lists allowed

▶ TRAINING RECORD (44)

▶ Classroom Training Session Schedule (22)

Custom report

Field filters User/OU filters Sort Summary Sharing Schedule Delivery

Training Title contains diversity

* Type or drag a field here

🔄 Refresh ⚠ Maximum number of records: 5000 Options Actions

User Full Name	Department	Training Title	Training record Status	* Type or drag a field here
Names removed in accordance with data protection				
	Accommodation & Ti...	Diversity in the Workp...	Completed	
	Accommodation Servi...	Diversity in the Workp...	Completed	
	Accommodation Servi...	Diversity in the Workp...	Completed	
	Accommodation Servi...	Diversity in the Workp...	Completed	
	Accommodation Servi...	Diversity in the Workp...	Completed	
	Audio Visual	Diversity in the Workp...	Completed	
	Audio Visual	Diversity in the Workp...	Completed	
	Audio Visual	Diversity in the Workp...	Completed	
	Audio Visual	Diversity in the Workp...	Completed	
	Audio Visual	Diversity in the Workp...	Completed	
	Audio Visual	Diversity in the Workp...	Completed	
	Campus Services	Diversity in the Workp...	Completed	
	Campus Services	Diversity in the Workp...	Completed	
	Campus Services	Diversity in the Workp...	Completed	
	Campus Services	Diversity in the Workp...	Completed	
	Campus Services	Diversity in the Workp...	Completed	
	Cleaning Services	Diversity in the Workp...	Completed	
	Cleaning Services	Diversity in the Workp...	Completed	
	Cleaning Services	Diversity in the Workp...	Completed	
	Cleaning Services	Diversity in the Workp...	Completed	

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

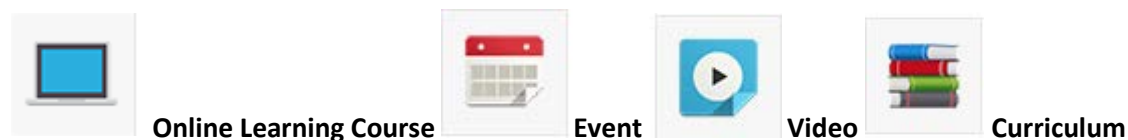
Curriculum – A number of learning assets (could be videos, documents or courses, etc.) grouped together (e.g. Leadership in Action)

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):



Icons in the “Browse for Learning” Page:



<p>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</p>		
<p>Status of Learning – On-Line Learning:</p> <p>Started</p> <p>Completed</p>	<p>Status of Learning – Events (where approval is required):</p> <p>Pending Approval (awaiting approval)</p> <p>Approved or Denied</p> <p>Registered (FULLY BOOKED)</p> <p>Completed</p> <p>Cancelled</p>	<p>Status of Learning – Events (where approval is NOT required):</p> <p>Approved</p> <p>Registered (FULLY BOOKED)</p> <p>Completed</p> <p>Cancelled</p>