The University of York Learning Management System (LMS)

Manager Guide

The purpose of this document is to provide a guide for a manager to use the LMS. It should be used in conjunction with the Staff Member 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 this guide describe the Manager specific functionality, such as approving and assigning learning.

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
Manager Specific

Assigning Learning:

Select Browse for Learning from the drop-down menu....

... which takes you to the Browse for Learning page.

When you click on the link to select an event, it brings up the Training Details of the event. (See next page)
Manager Specific

Assigning Learning

After browsing for the learning as shown previously, a manager can assign learning to a member of his/her team by clicking on the assign button.
Manager Specific

Assigning Learning

Select the appropriate direct report and click on submit ....

....and the learning event will be added to your direct report's training record
Manager Specific

Approving Learning

If you have learning to approve, you will receive an e-mail and you will have an action in your inbox. Click on the “approve training” link...

... this will take you to the pending requests page, where you can approve (✔️) or deny (❌).
Manager Specific

Delegation

You can delegate your authority in approval by selecting Settings, My Account

You will then be taken to the Preferences page, where you should select “share permissions from the drop down “Options” tab.
Manager Specific

You will arrive at the Share Permissions page where you can select the person you wish to be delegated the responsibility to. You can also partially delegate your role by using the "Define Access by Permission" link.

This in turn takes you to another page where you select the permissions that you wish to delegate.
Manager Specific

Reports

There are a number of standard reports for managers available in the LMS. They are accessed from the drop down tab.

Within the reports page there are standard reports on your team members learning. A description for each report is written under the title.
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 25\textsuperscript{th} February)

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