

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.

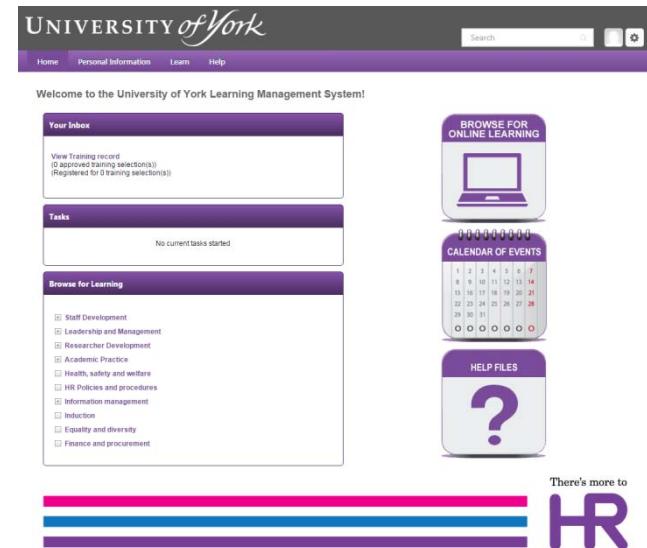
The first section of the Staff Member Guide describes the layout of the pages, what the buttons and icons are and the drop down menus. The second section describes simple functionality, such as booking a course using the calendar.

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....

The screenshot shows the University of York Learning Management System interface. At the top, there is a purple header bar with the 'Home' and 'Learn' tabs. Below the header, a purple sidebar on the left contains the following sections:

- Training** (clear): Popular, Newest, Topic (clear), Staff Development, Leadership and Management, Researcher Development, Academic Practice, Health, safety and welfare, HR Policies and procedures, Information management, Induction, Equality and diversity, Finance and procurement.
- Type** (clear): Event, Learning and Development, Course, Webinar, Book.
- Date Range** (clear): From, To, View full calendar.
- Location** (clear): Select a location.

The main content area is titled 'Browse for Learning' and shows '565 Results'. It includes a dropdown menu 'By Title ▾'. The results list several events:

- Hidden Aspects of an Academic Practice**
Event • Researcher Development Team
This session will look at the UK university structure Administration Everything else that academics do in their role apart from teaching that you might not have thought about (but should know about)! Do you know how a UK university works? What are the decision-making procedures? Who has management... [read more](#)
- HoD Induction Briefing 2**
Event • Learning and Development
- HoDs Induction**
Event • Learning and Development
To provide new HoDs with various briefings from Central Support Functions that incorporate key messages with the opportunity to discuss concerns, raise potential issues and capture areas of good practice.
- Honest Conversations for Managers**
Event • Leadership development
The course focuses particularly on conducting conversations with members of staff and as such can help to develop your skills of active Performance Management and managing tasks and workplace requirements. Such conversations, if satisfactorily conducted at a relatively early stage, can avoid the... [read more](#)
- Honest Conversations for Staff**
Event • Learning and Development
There may be circumstances which impact upon you or your team and which require you to exert influence. These could involve conversations with colleagues, customers or even your manager. This programme will provide practical opportunities to utilise a range of tools and techniques. An... [read more](#)
- Hot Work Safety Training**
Event • Health and Safety Training
- How am I coming across?**
Event • Learning and Development
By the end of this session, you will be able to: Define the transactional analysis. Consider your preference for giving and receiving praise at work. List the three ego states associated with the model. Practice ideas to influence the three dominant states. Differentiate between reciprocal, crossed... [read more](#)
- How to Communicate**
Event • Learning and Development
This session is part of the Administrator Support programme which aims to provide a platform to share best practice on key themes and offer internal networking opportunities. The programme offers University administrators an evolving range of defined subjects, derived from their own expressed needs... [read more](#)

... 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

Training Details



Honest Conversations for Staff

Event > Learning and Development

Request

Assign

There may be a range of situations which impact upon you or your team and which require you to exert influence. These could involve conversations with colleagues, customers or even your manager.

This programme will provide practical opportunities to utilise a range of tools and techniques. An opportunity is also provided to demonstrate the skills covered by using scenarios with colleagues. Among the areas looked at are:

- Reframing the situation
- Starting the conversation
- Feedback in honest conversations
- A framework for conducting the discussion
- Dealing with different reactions

Course ID

SD0068

Available languages

English (UK)

Topics

Staff Development > Personal and professional effectiveness

Objectives

By the end of the course you will be able to:

- Resolve the barriers to conducting such conversations
- Prepare for and apply the appropriate skills required for such conversations
- Deal effectively with the reactions of other parties
- Apply a range of tools and techniques through skills practice and in individual case studies

Training Contact

Jocelyn Parker jocelyn.parker@york.ac.uk

Sessions

Available ▾

[View full calendar](#)

No sessions for this event are scheduled at this time.

Notify me of new sessions

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

Training Details > Assign Training

Assign Training

 Honest Conversations for Staff
Event > Learning and Development

Select Session

Due Date 

Add a comment

Automatically register users

Users who already have the training in their training record are not included in this assignment

	Direct Reports	Language equivalence	Include subordinates
<input type="checkbox"/>	 BRUCE HOLLIDAY		
<input type="checkbox"/>	 BRYONY JONES		

Select an indirect report 

Select a user from a cost centre I approve 

Indirect Reports  Language equivalence

Submit

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...

Welcome to the University of York Learning Management System!

Your inbox

[View Training record](#)
(0 approved training selection(s))
(Registered for 0 training selection(s))

Approve training

(Your employees have 1 training request(s) pending approval)

Your tasks

No current tasks started

View Pending Requests

View outstanding training requests you must approve, defer, or deny. Deferring a request will send the request to the next person in the approval chain for that employee. Click on the employee's name to view their training record. If you would like others to make approvals on your behalf, you may set permissions for users for whom you are the following:

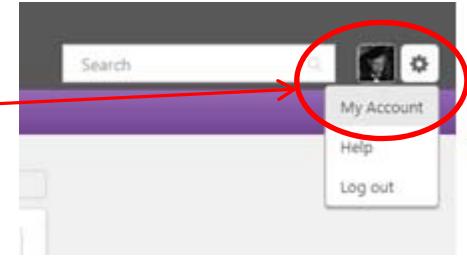
... this will take you to the pending requests page, where you can approve () or deny ()

Training Pending Approval				
Printable Version Export to Excel		<input type="button" value="Search"/>	Type	Date
Requested By	Training			Options
AIKMAN , ALLAN  Learning and Development (Department) KATHERINE O'SULLIVAN (Manager)	Internal Candidate (Starts 20/01/2015)		Initial	29/12/2014 11:37  

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

My Account > Preferences

Preferences

ALLAN AIKMAN
Learning and Development

Settings

On holiday
(Change your status to 'Out of Office' if you will be away on an extended leave)

Select Signature
ALLAN AIKMAN ▾

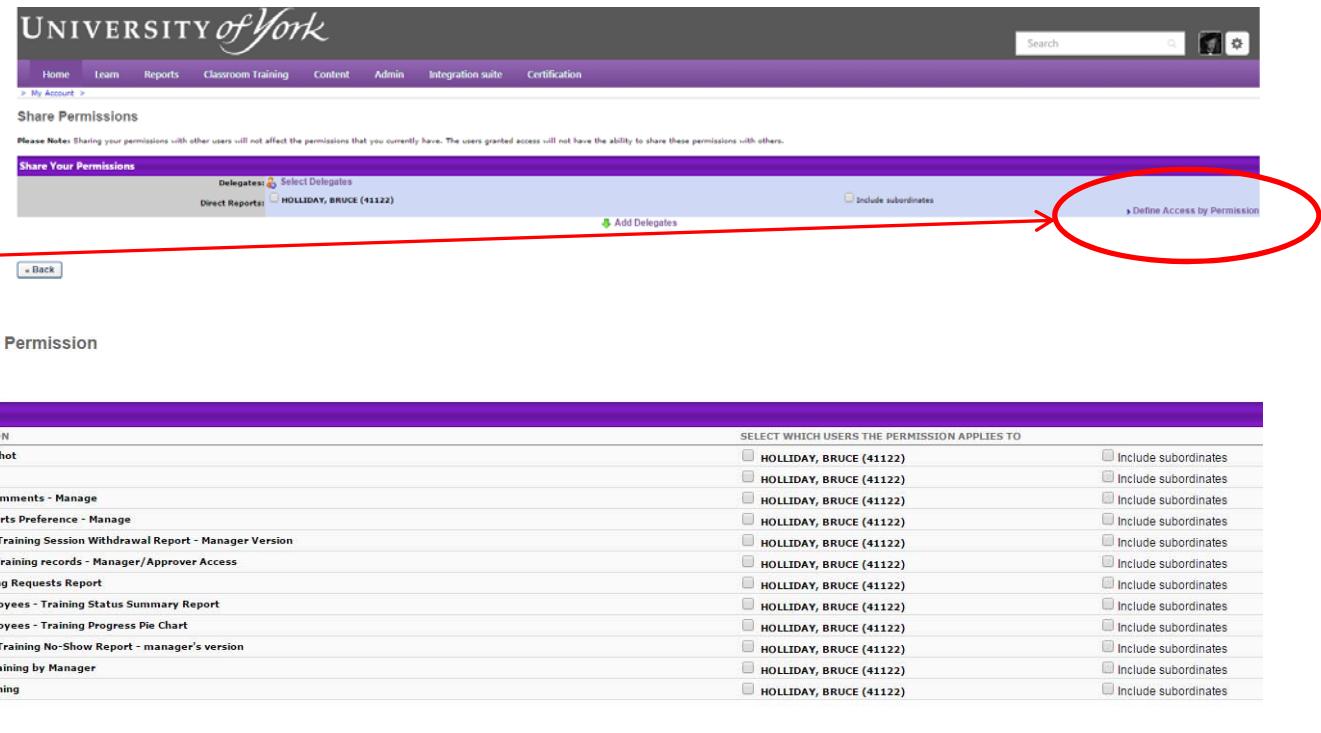
Options ▾

- Change Password
- Share Permissions

Cancel Save

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



The screenshot shows the University of York's Share Permissions interface. At the top, there's a navigation bar with links for Home, Team, Reports, Classroom Training, Content, Admin, Integration suite, and Certification. Below this is a sub-navigation bar with 'My Account' and 'Share Permissions'. The main content area is titled 'Share Permissions' with a note: 'Please Note: Sharing your permissions with other users will not affect the permissions that you currently have. The users granted access will not have the ability to share these permissions with others.' It shows 'Delegates' (HOLLIDAY, BRUCE (41122)) and 'Direct Reports' (HOLLIDAY, BRUCE (41122)). There are buttons for 'Select Delegates', 'Add Delegates', and 'Include subordinates'. A red arrow points from the 'Define Access by Permission' link in the top right of this section to the 'Define Access by Permission' page below. A red circle highlights the 'Define Access by Permission' link on the Share Permissions page.

Share Permissions

Please Note: Sharing your permissions with other users will not affect the permissions that you currently have. The users granted access will not have the ability to share these permissions with others.

Share Your Permissions

Delegates: [Select Delegates](#)
Direct Reports: [HOLLIDAY, BRUCE \(41122\)](#)

Include subordinates [Define Access by Permission](#)

[Back](#)

Define Access by Permission

[Tick / Untick All](#)

Standard permissions

SELECT	PERMISSION	SELECT WHICH USERS THE PERMISSION APPLIES TO
<input type="checkbox"/>	View snapshot	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	View Bio	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	MyTeam Comments - Manage	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	Direct Reports Preference - Manage	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	Classroom Training Session Withdrawal Report - Manager Version	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	Employee Training records - Manager/Approver Access	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	Past Training Requests Report	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	Track Employees - Training Status Summary Report	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	Track Employees - Training Progress Pie Chart	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	Classroom Training No-Show Report - manager's version	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	Approve Training by Manager	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates
<input type="checkbox"/>	Assign Training	<input type="checkbox"/> HOLLIDAY, BRUCE (41122) <input type="checkbox"/> Include subordinates

[Cancel](#) [Save](#)

Manager Specific

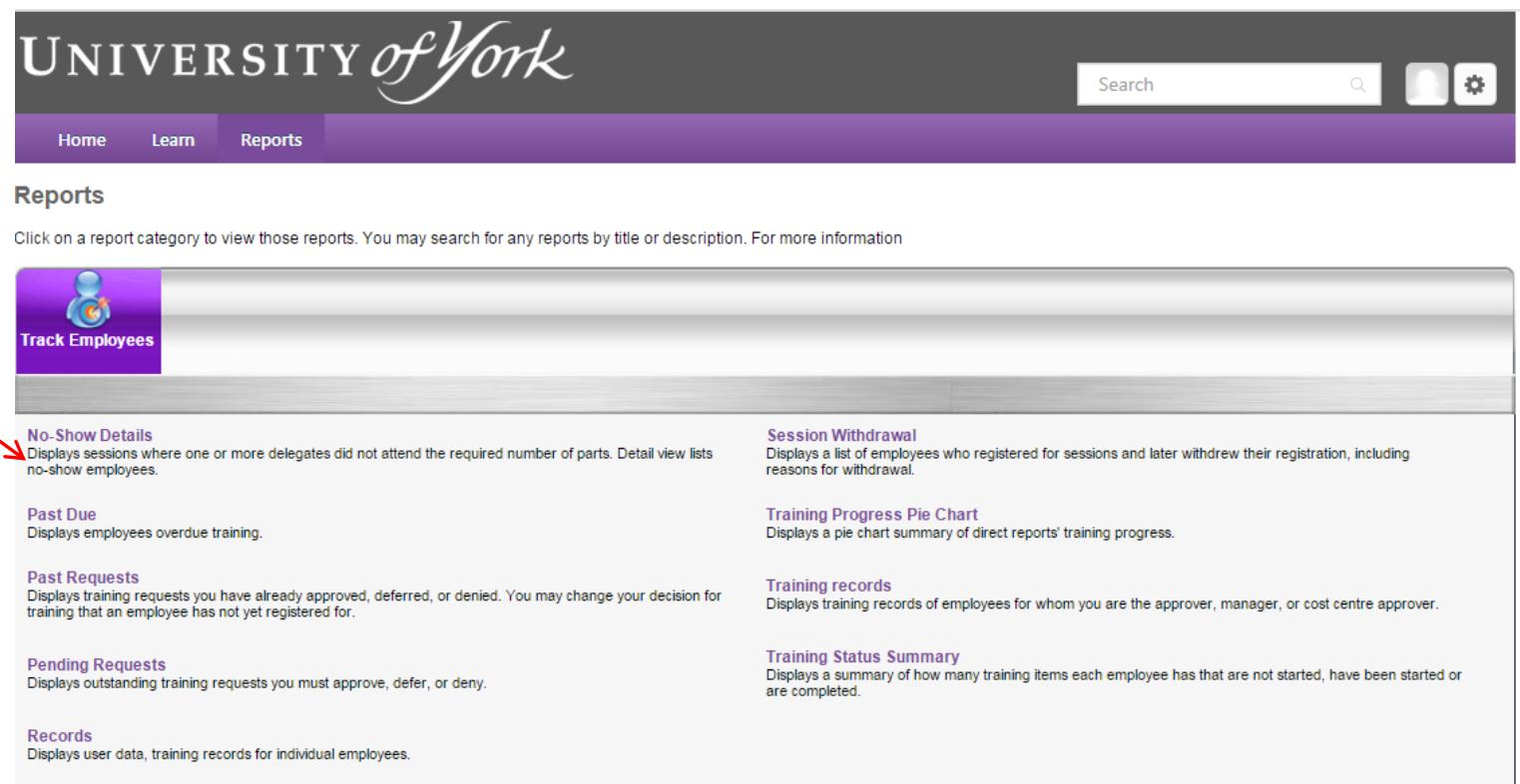
Reports

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



The image shows the University of York Learning Management System (LMS) home page. The header features the 'UNIVERSITY of York' logo. Below the header is a purple navigation bar with three tabs: 'Home', 'Learn', and 'Reports'. The 'Reports' tab is highlighted. A red arrow points from the text in the previous block to the 'Reports' tab. The main content area displays a 'Standard Reports' dropdown menu with the following options: 'View Training record', '(0 approved training selection(s))', and '(Registered for 0 training selection(s))'. Below this is a 'Your Inbox' section.

Within the reports page there are standard reports on your team members learning. A description for each report is written under the title



The image shows the 'Reports' page of the University of York LMS. The header features the 'UNIVERSITY of York' logo and a purple navigation bar with 'Home', 'Learn', and 'Reports' tabs. The 'Reports' tab is active. A red arrow points from the text in the previous block to the 'Reports' tab. The main content area is titled 'Reports' and contains a sub-section titled 'Track Employees'. Below this are several report categories with descriptions:

- No-Show Details**
Displays sessions where one or more delegates did not attend the required number of parts. Detail view lists no-show employees.
- Past Due**
Displays employees overdue training.
- Past Requests**
Displays training requests you have already approved, deferred, or denied. You may change your decision for training that an employee has not yet registered for.
- Pending Requests**
Displays outstanding training requests you must approve, defer, or deny.
- Records**
Displays user data, training records for individual employees.
- Session Withdrawal**
Displays a list of employees who registered for sessions and later withdrew their registration, including reasons for withdrawal.
- Training Progress Pie Chart**
Displays a pie chart summary of direct reports' training progress.
- Training records**
Displays training records of employees for whom you are the approver, manager, or cost centre approver.
- Training Status Summary**
Displays a summary of how many training items each employee has that are not started, have been started or are 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:



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

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