

# 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.

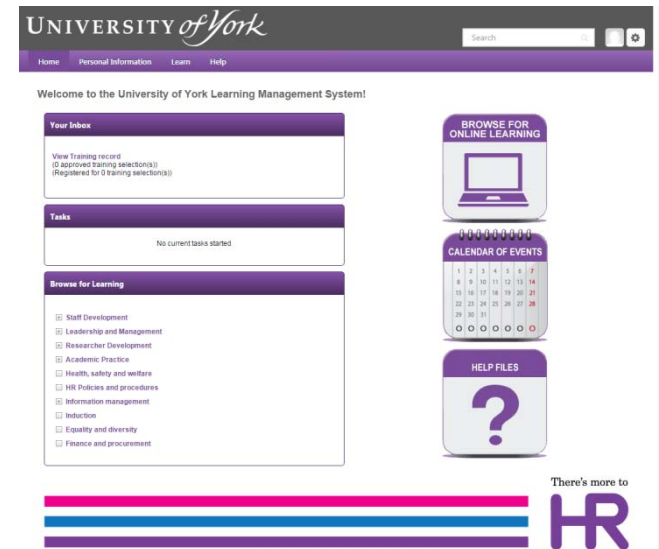
The first section of the Staff Member Guide describes the layout of the pages, what the buttons and icons are and the drop down menus. The second section describes simple functionality, such as booking a course using the calendar.

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)

A screenshot of the 'Browse for Learning' page. The page title is 'Browse for Learning 565 Results'. On the left, there are filters for 'Training' (Popular, Newest), 'Topic' (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' (with icons for various media types), 'Date Range' (with 'From' and 'To' date pickers and a 'View full calendar' link), and 'Location' (with a 'Select a location' dropdown). The main content area displays a list of training events. The event 'Honest Conversations for Staff' is circled in red. A red arrow points from the text 'When you click on the link to select an event, it brings up the Training Details of the event. (See next page)' to this event. Other events listed include 'Hidden Aspects of an Academic Practice', 'HoD Induction Briefing 2', 'HoDs Induction', 'Honest Conversations for Managers', 'Hot Work Safety Training', 'How am I coming across?', and 'How to Communicate'. Each event entry includes a title, a category, and a brief description with a 'read more' link.

## 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

Reset 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](mailto:jocelyn.parker@york.ac.uk)

Sessions Available

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

<input type="checkbox"/>	Direct Reports	Language equivalence	Include subordinates
<input checked="" 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
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[Cancel](#) [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:

**Training Pending Approval**

Printable Version Export to Excel

Name [ ] Search

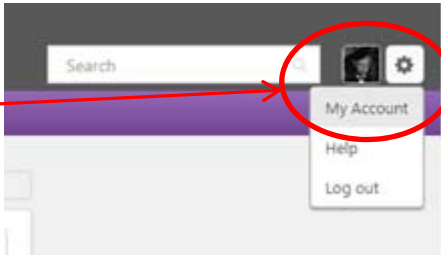
Requested By	Training	Type	Date	Options
AIKMAN, ALLAN Learning and Development (Department) KATHERINE OSULLIVAN (Manager)	Internal Candidate (Starts 20/01/2015)	Initial	20/12/2014 11:37	<a href="#">✓</a> <a href="#">✗</a>

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

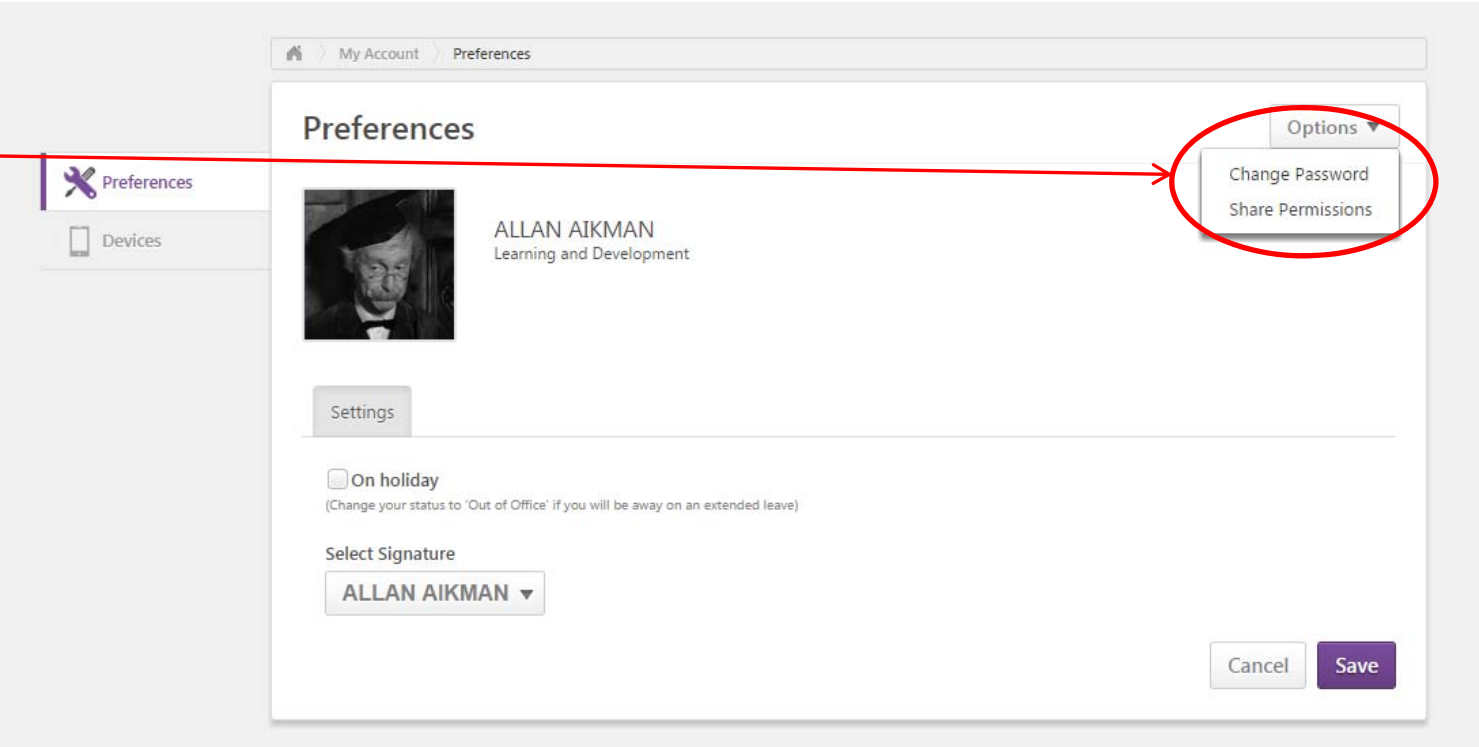
# Manager Specific

## Delegation

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

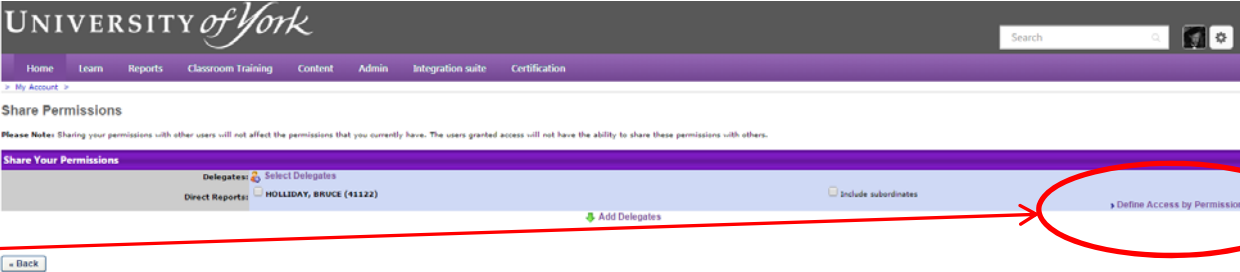


You will then be taken to the Preferences page, where you should select "share permissions" from the drop down "Options" tab



# 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

## 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

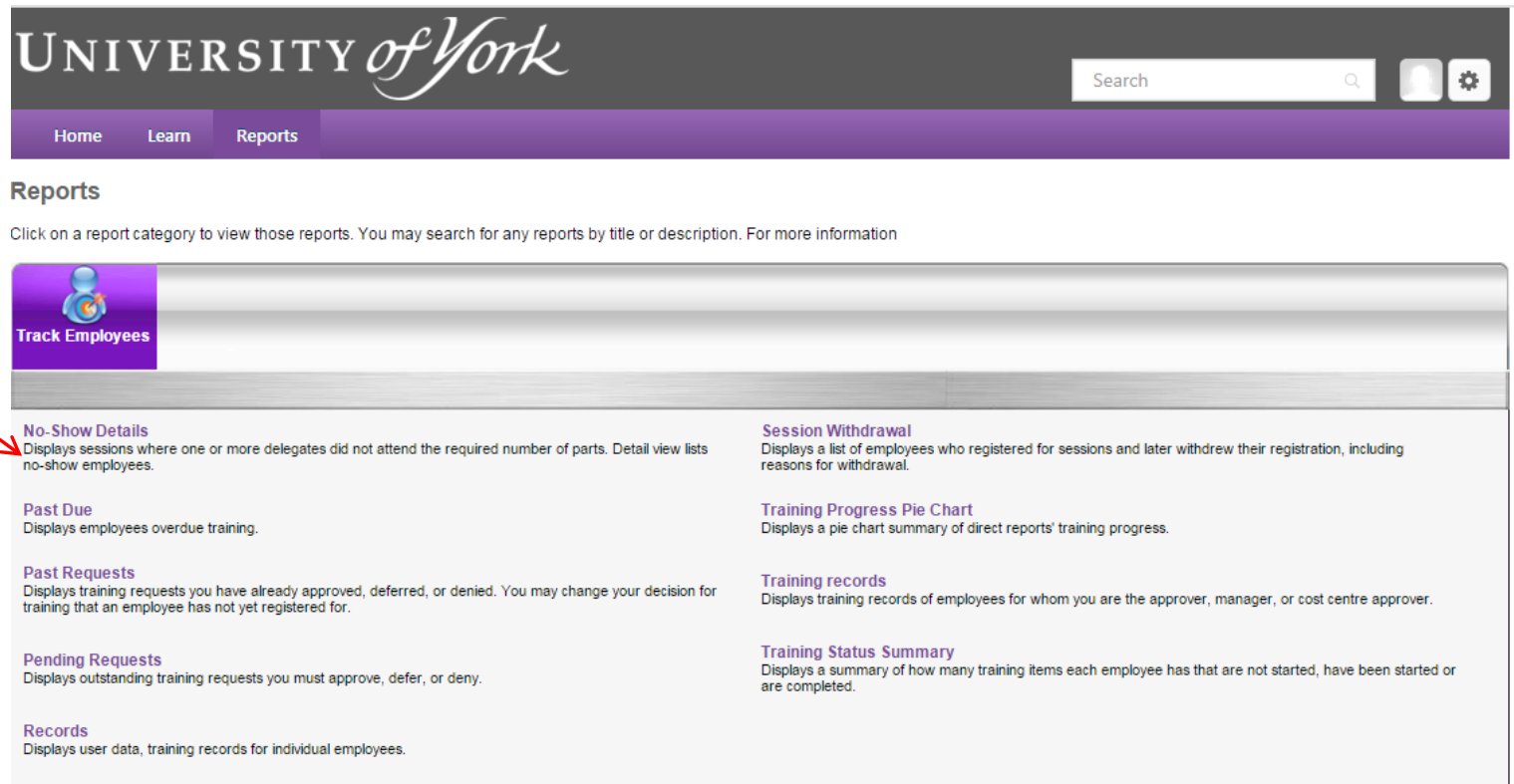
## Manager Specific

### Reports

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



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<sup>th</sup> February)

**Part** – This is when a learning event is over more than one day e.g. Project Management Part 1 on 5<sup>th</sup> June and Project Management Part 2 on 15<sup>th</sup> 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 ( <b>FULLY BOOKED</b> )
	Registered ( <b>FULLY BOOKED</b> )	Completed
	Completed	Cancelled
	Cancelled	