Manager Role

PRECISE
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Manager/My Team

By assigning a Manager to a Group by way of the user import or an Admin manually granting the role, the Manager will be able to add users to their group, manage user enrollments and process performance reviews. Below is the main Manager/My Team page and an explanation of the icon functionality can be found here. Click the icon to go to that topic in this document.

Click this to add a new user to your group. This icon will only be available to the Manager if the Admin has given the Manager the option to enroll users in their Group. If the Admin has set a limit on the Group size and the user tries to enroll additional users beyond this limit, they will receive a notification.

The calendar icon will display both users and Instructors that are members of the Group and have been assigned to live training, so the Manager knows who may be out on certain days.

The sessions icon will allow the Manager to filter the activity of Group members by date range.

The group enrollment will allow a Manager to assign multiple members to one or more courses. This process will ensure the users have taken the course/s selected but will not create an additional enrollment if they have already taken it. To re-enroll a user, you would need to enroll by user.

The Group Report will show all group activity.

The Manager has access to each users Transcript but may not edit it like the Admin can.

The Manager may choose to enroll users in courses one at a time. This will also give the Manager the ability to make a user retake a course by selecting the Re-enroll button.

Performance reviews can be completed for members of a group. This function must be activated by the Admin for it to be available. This process will allow the Manager to complete an existing Performance Review or create a new one for their groups.

The user Profile Edit will give the Manager access to the entire form and allow them to make changes.

The information button will show the Group description.
Manager/My Team

Create New User

The new user process uses the same form as a self-registering user. It includes the custom criteria created by the Admin as well as the ability of the Manager to load a user's image. The documents loaded to the user's profile will also be available for the user to see. If the group limit has been reached and this icon is clicked, the following message will be displayed, otherwise the Manager will see the new user form.
Manager/My Team ...continued

View Team Calendar

This calendar view will show members of this group in sessions whether they are an Instructor or Learner. The color coding blocks indicate different instructors. By clicking on the specific session, only members of this group will be displayed as enrolled in the session details area to the right.

View Class Session List

This report will allow the Manager to search for users taking live training over a specified time period.
Manager/My Team ... continued

Enroll Group

The Enroll Group function will allow you to select multiple courses and or group members and process the enrollments all at one time. This process will not re-enroll users if they have already taken a course selected. It is intended to make sure everyone has taken the courses selected.

Group Report

The group report will give you an overview of enrollments status as well as the individual enrollment details.
Manager/My Team

Users Transcript

The users transcript can be viewed but not altered as a Manager. This view does however allow the Manager to Grant Badges if available, view Certificates and completed Performance Reviews.
Manager/My Team

Enroll User

Using this icon will allow the Manager to enroll or re-enroll the user into a course or courses. The Manager also has access to all Learning Paths created in the system. This may not work for clients placing multiple customers in groups within the system and utilizing the Learning Path functionality.
Manager/My Team

Enroll User ...continued

When the Manager enrolls a user in a course that has a live class they will be given an opportunity to also enroll the user in one of the sessions or select Choose Later to allow the user to pick one from their My Training page.

If you have many courses with live classes in them, there is also a calendar page that will allow the Manager to enroll the user directly into a session. At the same time, the user will be enrolled in the corresponding course housing that class. This potentially will give the user more lessons to complete on their My Training page if the course was composed of multiple lessons. Just click on the session located on the calendar and click Enroll.
Manager/My Team

Performance Review

By clicking the Performance Review for the user you will see the reviews available. You can either select one to start the review or select Manage Performance Reviews to edit or create a new one for the Group.

Here, we are selecting to start the Inspectors Review.
Manager/My Team

Performance Review...continued

The performance level of a task can be linked to a course enrollment. If the user performs to that level, good or bad, the Manager will be notified of possible enrollments. The Manager will then decide whether to enroll the user in those courses or not.

To add a new review, select the performance review icon from the Manager/My Team page and then select the Manage Performance Reviews and finally select the Add Performance Review. When completing the form be sure to choose which Groups you would like the Performance Review to be available for. Remember, you may by a Manager of many groups as will other Managers. In some cases, you may not want them to have your additional Reviews.
Manager/My Team

Performance Review...continued

Begin adding Tasks to your Performance Review by clicking Add Task.

One of the best functions of the Performance Review is that you can automatically suggest course enrollments based on how a user does on a particular task. Simply select the Remediation Content and if the user is rated at that performance level, the course will be suggested to the Manager at the end of the process. If the user scores in the Poor Performance then they will be recommended to take the ESD Introduction Course below.
Manager/My Team ...continued

Performance Review...continued

Continue adding Tasks and Headers to create your final Performance Review. This is what the review would look like for the Manager. Simply rate the user and out comes the suggestions based on the review setup. The Manager would then be able to accept the recommendations of unselect them not to enroll the user.

The score is generated by giving the user 33 points for the lowest performance, 66 points for the middle performance and finally 100 for the highest. The final score is then the average across all tasks.
Manager/My Team ...continued

**Edit User Profile**

This function brings up the users Profile page and allows the Manager to make changes even if the Admin has locked the user profile on the Admin/System/General Settings page. The locking of the User Profile only applies to the Users ability to change their own profile.
Enroll User continued

Manager/My Team ...continued

Information

This icon displays a quick overview of the user.

Manager/Dashboard

This page displays a quick overview of the group for each of the Groups the user Manages.
Manager/Custom Report

The custom report is extremely helpful because it can auto deliver reports to email address so users do not have to login to the LMS to see what is going on. There are several filters that can be setup and saved so that the report can be delivered any time.

A course, all courses or any combination of courses can be added to a report. This is the same for groups and users.

When preparing an auto delivery report, be sure to use either a large date range or a relative time frame so that the report delivered is not the same each time.

Custom user and group criteria can be used to help filter reports.

For auto delivery reports make sure you choose a format, address and frequency for the delivery. This frequency should consider the date range or relative time frame.
Manager/Custom Report...continued

Running the report yields the data applying all filters selected. The Export to Excel will also include the user's custom criteria data.

Select User to be Emailed

Export to Excel

PDF

Compose Email
Manager/Group Report

The Group Report gives overall numeric total values for course status and a drill down to view the complete makeup of the data.

Manager/Requests

The requests page is where the Manager can go to approve or deny course enrollment requests. These requests are initiated by the Content Admin setting the course property of “Restricted” to Yes. This will place the course on the catalog pages with a Request vs. an Enroll button.

Manager/Resources

Resources loaded by a manager for a group will only be available for those group members on their Learner/Resources page.
Manager/Resources...continued

Resources can be uploaded documents or internet links.

The final link look like this with functional icons on the right.

Manager/Exceptions Report

The Exceptions Report is just a special case of the Custom Report that displays users who have failed a course or their course is overdue. In theory if this report is clear then everyone is doing what they are supposed to be doing. This report will only yield data for members of the Managers Groups.