DBHDD UNIVERSITY
Learning Portal
(the LMS)

Job Aid

for

MANAGERS

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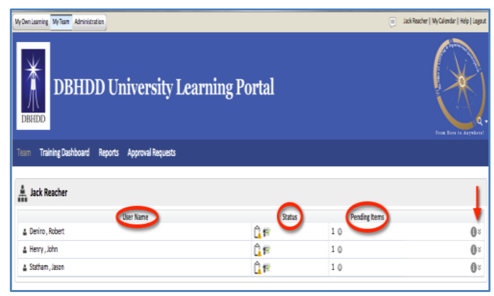
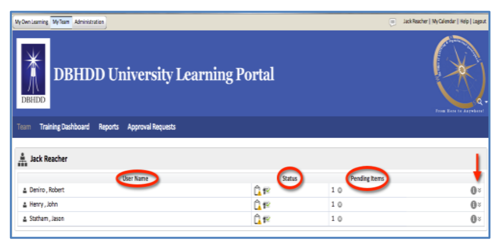
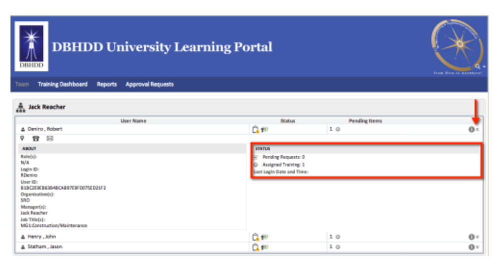
Viewing Staff Training Information

Introduction

This job aid will provide instructions for you to view the training status of your direct reports. It will guide you through the My Team view, which provides detailed training information on enrolled courses and their completion status.

Steps for Viewing Direct Reports Training Information

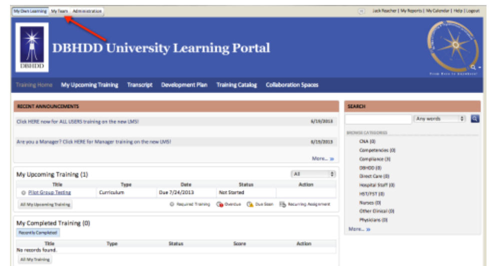
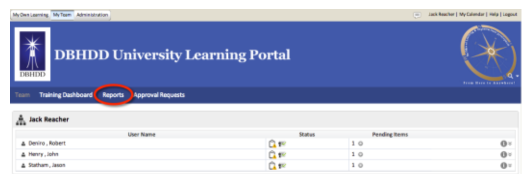
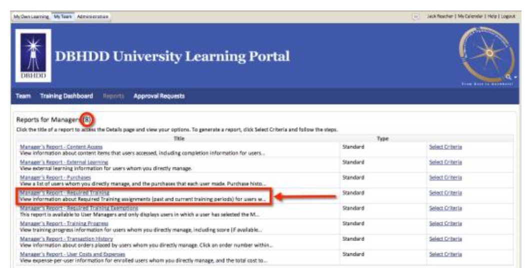
Step	Action	Visual
1	**<u>Access the My Team View</u>** From the My Own Learning page **click** on "**My Team**" in the upper left-hand corner of the screen. **<u>Result</u>** You are in the **My Team view**. **<u>Note</u>**: Under the *User Name* column you will see a list of your direct reports. The ***Status column*** provides you with a snapshot of where your direct report is with their training courses. The *Pending Items* column indicates items that your direct reports have not completed yet.	 
2	<u>View Detailed Training Information</u> **Click** on the "Expand Row" icon on the right side of the screen to view training details. **<u>Result</u>** You will be able to review additional information on your direct reports including staff profiles, assigned trainings, pending reports as well as their last login time and date stamp. **Click** the "**Expand Row**" icon again to collapse this view.	 

Running Standard Manager Reports

Introduction

This job aid will provide steps for running Standard Manager Reports on your staff's training progress.

Steps to run a Standard Manager Report

Step	Action	Visual
1	<u>Access the Reports for Manager Page</u> From the My Own Learning page **click** on "My Team" in the upper left-hand corner of the screen. **Click** the "Reports" link to access the Reports for Managers Page. **<u>Result</u>** You are in the Reports for Managers View. **<u>Note</u>**: In this view you will see how many reports are available to you next to the header in parentheses. The second column *Type* shows the type of report.	  

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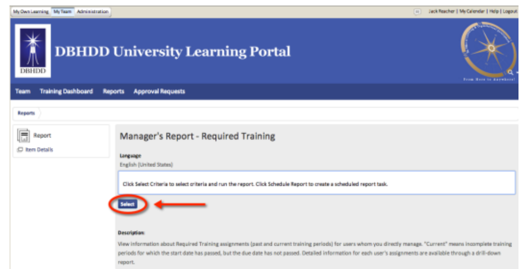
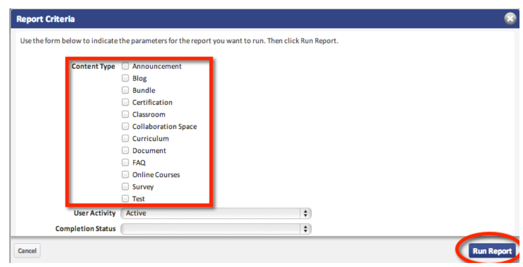
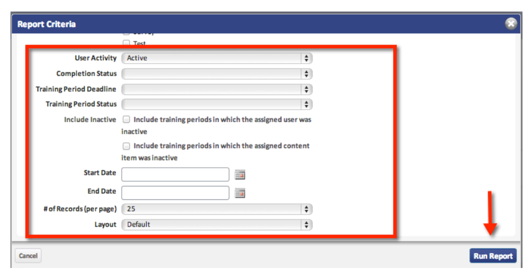
Running Standard Manager Reports, Continued

Steps to run a Standard Manager Report (continued)

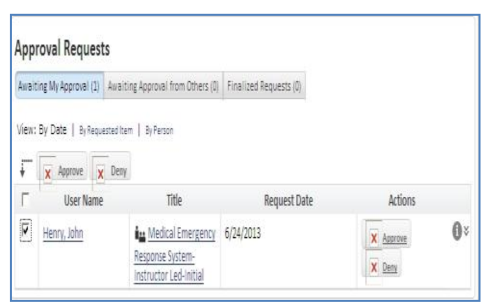
Step	Action	Visual
2	**<u>Select a Manager's Report</u>** The Manager's Report **Click** on the name of the Report. **Click** the "Select" button to view the Report Criteria. **<u>Result</u>** A "Report Criteria" pop-up is displayed. **<u>Note</u>**: You have the option of selecting content to include in your report by **clicking** on the box next to the content type.) **Scroll down** to view Report Criteria. **<u>Result</u>** A pop-up window appears giving you the option of filtering by user activity, completion status, start and end date, etc... You may choose a layout and specify the number of records you would like to see per page in the report.	 
3	**<u>Review the Report</u>** **Click** the "Run Report" button at the bottom of the pop-up window. **<u>Result</u>** The report will appear in a separate pop-up window. **Note:** To schedule a report, click on the Schedule button and follow the prompts.	

Approving or Denying Training Requests

Introduction

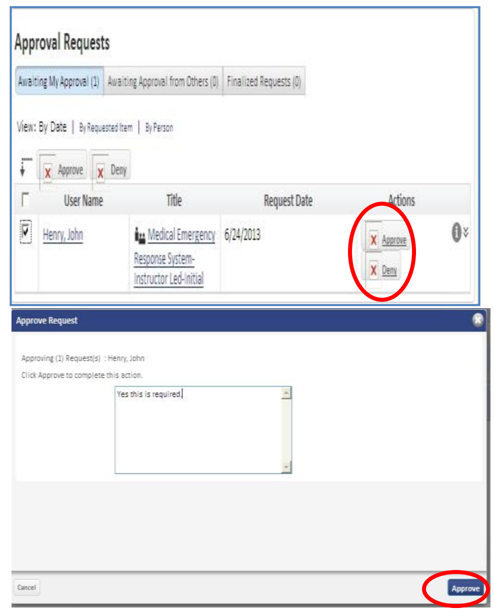
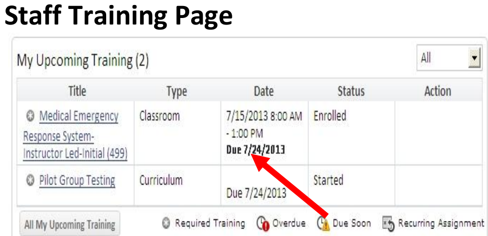
This job aid will demonstrate how to approve or deny training requests from your staff.

Steps for Approving Training Requests

Step	Action	Visual
1	**<u>Locate Approve Console or the Approval</u>** **<u>Important</u>**: As a DBHDD manager, it will be your role to assist in the management of your direct report(s) training activities. You will have the ability to enroll them in upcoming classroom, virtual or eLearning courses. You will also have the capability to assign a document, such as a read & sign, for them to review and sign. You will also approve training requests On the My Team page, click on **Approval Requests** **<u>Note</u>**: The My Action and Final Action fields have a default setting of "Pending." Leave as-is and click "Search."	
2	**<u>Review a Request</u>** **Click** the Expand icon in front of your direct report's name. Review the request to enroll in the course. **Click** "Go" next to "Take Action" in the Action column.	

Approving or Deny Training Requests, continued

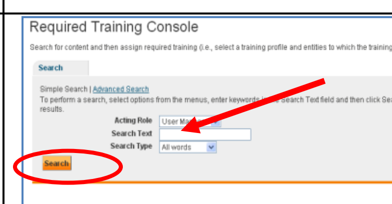
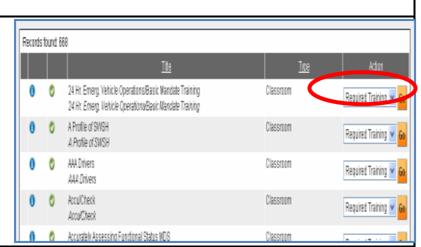
Steps for Approving Requests (continued)

Step	Action	Visual
3	<u>**Note**</u>: If approving or denying multiple user requests at once, with the same reason for the approval or denial, **select** the checkbox in front of each applicable request then **click** the “**Approve**” or “**Deny**” button at the bottom of the pending approvals results table. Review the Reason for Request. <u>**Approve or Deny the Request**</u> Note: If you wish to approve their request, **click** the radio button for “**Approve**” If you wish to deny their request, **click** the radio button for “Deny” then enter why you are denying the request in the “Reason for Action” text box. <u>**Result**</u> You have taken action on a course enrollment request. If you select **Approve**, your staff will automatically be enrolled in the training	 **Staff Training Page** 

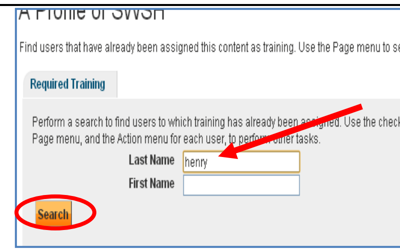
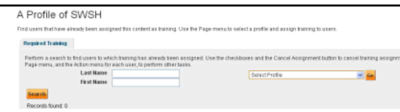
Assigning Training to Staff

Introduction — This job aid will provide steps for assigning training to your staff.

Steps for Assigning Training to Staff

Step	Action	Visual
1	Click on the Administration tab at the top left hand side of the Training Home page	
2	Click on the **Required Training Console** under the **Training tab**	
3	Type the name of the Training you wish to assign in the **Search text** field **OR** Click the **Search** button to find the required training **Note:** The search text field will filter the training you need. Use this option.	
4	Locate the training you need to assign, the click GO next to the required training drop down bar	

Assigning Training to Staff, Continued

5	Enter the name of your direct report, then click **Search** to locate the name of your staff, then click **Assign**	
6	Select **Profile** on the right of the screen to specify how the training is to be assigned	

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