

UC LEARNING CENTER: Manager Guide

UPDATED 6/15/2017

Introduction

The UC Learning Center is the web-based Learning Management System (LMS) used across the University of California for Systemwide training and development. Those who have direct reports identified in the UC Learning Center will receive the Manager Role, in addition to the standard Learner Role. In some cases, individuals may be given the Manager Role if they have been identified as needing access to manage the training of those who are not their direct reports.

With the Manager Role, you can:

- View training history and status of assigned training of direct reports or viewable users
- View direct reports or viewable users current training schedule
- Register direct reports or viewable users for activities
- Assign activities to direct reports or viewable users

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Logging into the UC Learning Center

Log in at lms.ucdavis.edu using your UC Davis Login (Kerberos).

Navigation

Homepage

When you first login to the UC Learning Center, you will see the homepage. Here you can launch activities you are currently registered in, navigate to your training schedule or transcript, and use search features to locate activities you wish to take. These will all be reflected on your own account. You can also get information about your direct reports.

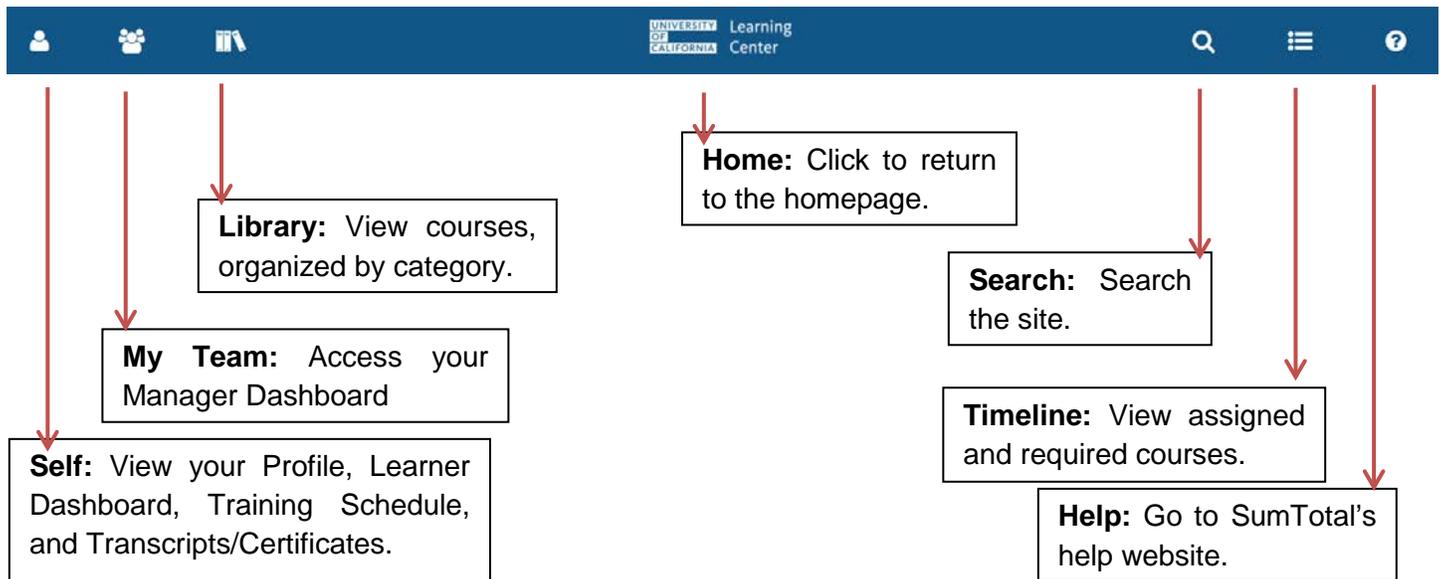
The Manager view is an enhanced version of the Learner view. For more information on Learner access, refer to the Learner Guide.



- **Manage My Registrations:** View your Training Schedule, where you can see both upcoming in-person activities you have registered to attend, as well as any online activities you are currently in progress with.
- **My Learner Dashboard:** Access your required training and recently launched training
- **Transcript & Certificates:** View transcripts for any courses you have completed in the UC Learning Center, as well as any training you have self-reported [delete self-reported training
- **Find a Course:** Search for a course.
- **How To:** Short YouTube [instructional videos](#)
- **Support:**
 - UC Davis Campus:
 - Contact UC Davis Staff Development and Professional Services at sdps@ucdavis.edu for assistance with the UC Learning Center.
 - UC Davis Health:
 - If you have any issues or problems with UC Learning Center, please submit a Support Request through Employee Self Service or call (916) 734-HELP (4357).

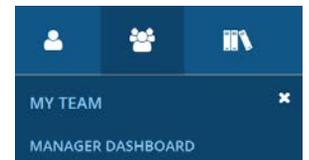
Top Menu

The Top Menu will appear on every page. Hover over each icon to see where they will take you. You may not see every icon, depending on your permissions.



Using the Manager Tools

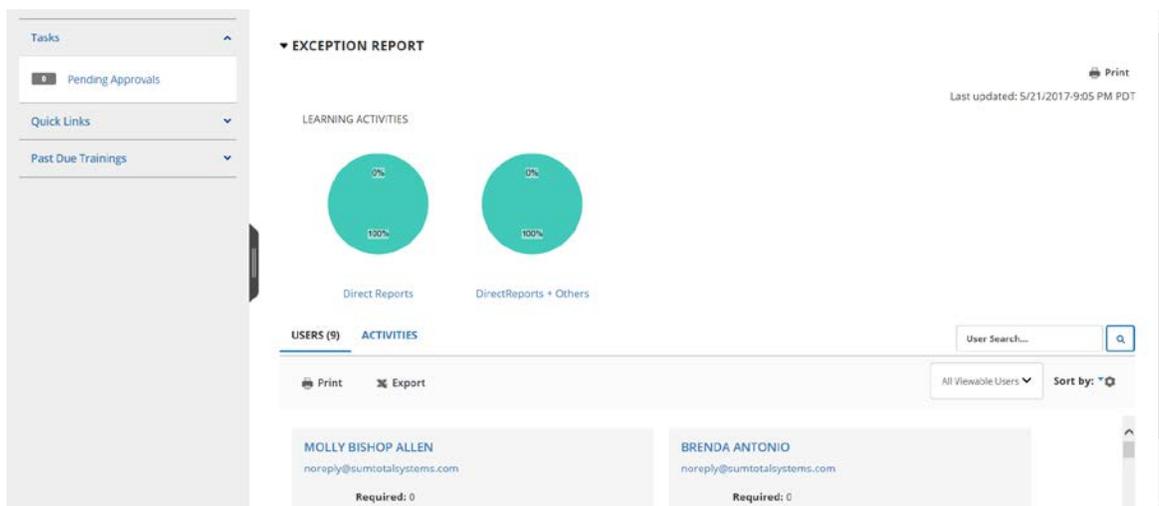
Once you have been identified as the manager of a user in the UC Learning Center, you will automatically have the **My Team** icon appear in the Top Menu. This will give you access to a **Manager Dashboard**.



Manager Dashboard

When you navigate to your **Manager Dashboard**, you will be able to see:

- A snapshot of your current exception report, which shows the overall status of your managed users' assigned training.
- A list of your managed users with the status of their individual assigned training.



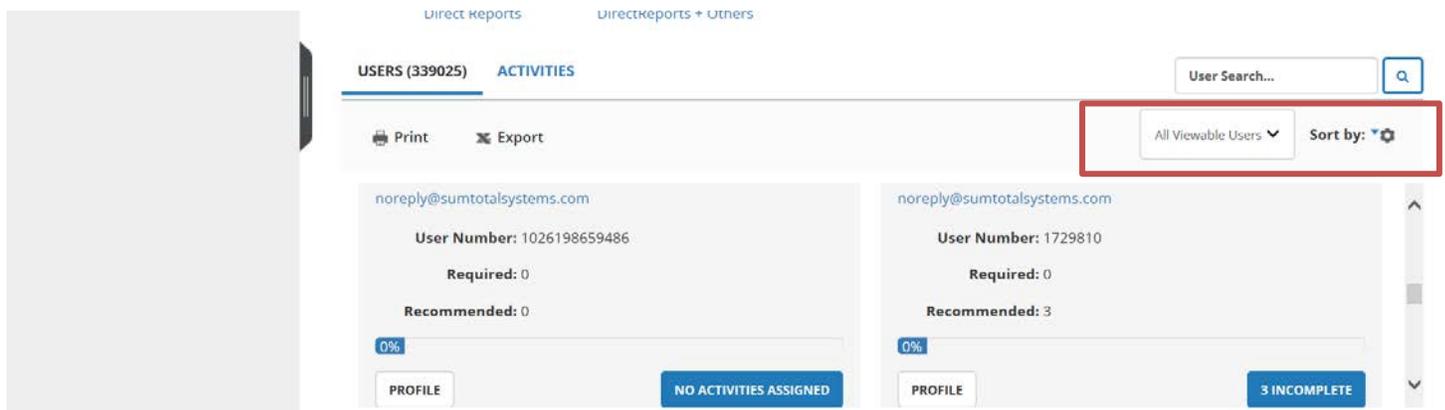
Note: Manager Dashboard is updated nightly, so if one of your users completed training after the last update, it will not appear in this view until the next update. However, the user's training transcript and schedule are displayed in real time and will show you their latest status.

View Managed Users

In the Manager Role, you have the ability to view information about your managed users and the progress of their assigned activities.

Your viewable users will all be displayed in tiles on your **Manager Dashboard**. You can scroll through these tiles to locate a particular individual or you can search the user by name, or sort in ascending or descending order (by name, assignment progress, etc).

You will automatically see all users you have been given access to view, either as your direct reports or as managed users whose training you are responsible for managing. If you manage more users than just direct reports, you can change your view from **All Viewable Users** to **Direct Reports** if you wish to only view your direct reports.



The screenshot displays the Manager Dashboard interface. At the top, there are tabs for 'Direct Reports' and 'Direct Reports + Others'. Below this, the 'USERS (339025)' tab is active, and the 'ACTIVITIES' tab is also visible. A search bar labeled 'User Search...' is located in the top right corner. Below the search bar, there are two buttons: 'Print' and 'Export'. A red box highlights the 'All Viewable Users' dropdown menu and the 'Sort by:' settings icon. The main content area shows two user tiles. The first tile is for a user with email 'noreply@sumtotalsystems.com' and User Number '1026198659486'. It shows 'Required: 0' and 'Recommended: 0' with a progress bar at 0%. Below the tile is a 'PROFILE' button and a blue button labeled 'NO ACTIVITIES ASSIGNED'. The second tile is for a user with email 'noreply@sumtotalsystems.com' and User Number '1729810'. It shows 'Required: 0' and 'Recommended: 3' with a progress bar at 0%. Below the tile is a 'PROFILE' button and a blue button labeled '3 INCOMPLETE'.

View Status of Assigned Training

When you first enter your **Manager Dashboard** you will see an overview of your managed users and the status of their assigned training. The **Exception Report** at the top will show you the percentage of compliance your managed users are currently at for all training assigned to your managed users. For each individual, you will see the overall status of their currently assigned training. Click the blue **Incomplete** button to see a more detailed report. Remember, you can also sort this list by process.

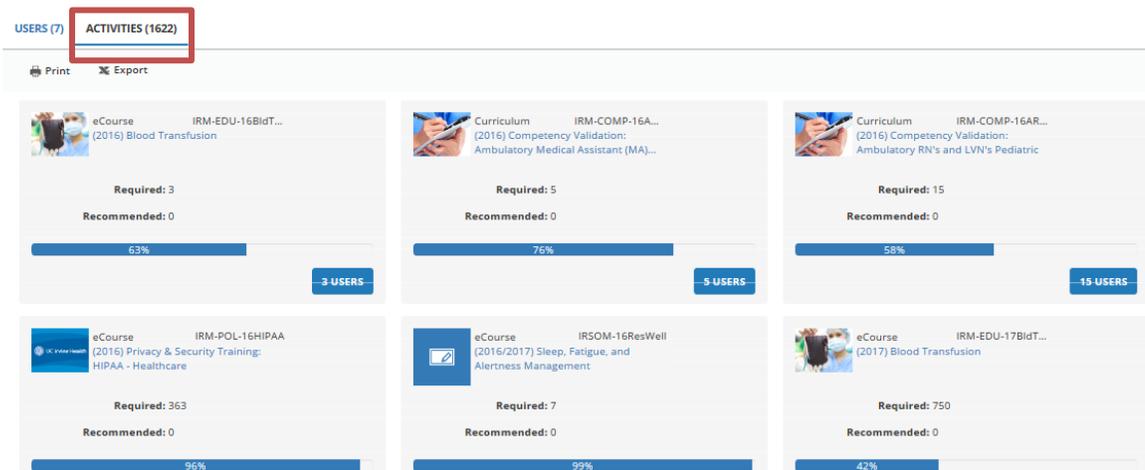


Assigned Training by Activity

You can also see which trainings are assigned to your managed users and the overall completion of the training.

Switch from the **Users** view **Activities** view to see all the activities that are currently assigned to your managed users. You will now see how many are still required to complete each training and the overall percentage of completion.

Click on the blue **Users** button to see who is still required to complete the training.



Individual Reports

To view a detailed report for an individual user:

1. Locate the user you wish to find out more information about.
2. Click on the blue **Incomplete** button.



This will show you an overview of the user's currently assigned training, including a list of all training that has been assigned, the due date for each training, and their overall progress in completing all assigned training.

DETAILED EXCEPTION REPORT BY USER Sarah Tenenbaum
List of Activities assigned to this user.

Overall Progress: **4**

Current Assignments: **3** Last Processed: Monday, April 10, 2017 9:06:10 PM PDT

Refresh

Activity Name	Assignment Type	Due date	Progress
General Compliance Briefing 2012-2013	Required	5/9/2017	0%
UC Sexual Violence and Sexual Harassment Prevention Training for Staff	Required	5/16/2017	0%

Records: 1-2 of 2

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GENERAL COMPLIANCE BRIEFING 2012-2013

Description: UC Ethical Values and conduct training for UC employees.
Activity Type: eCourse
Assignment Status: Assigned
Assignment By: Aud - UCOP Audience

SUMMARY

1. Clicking the **Title** of the course will show you more information about the training.
2. Using the menu bar on the left side, you can filter the training to show only what assignments are **Overdue** or what has been **Completed**.
3. You will see when the information was **Last Processed** in the top right corner.
4. Clicking the **Close** button will take you back to the Manager Dashboard.

Training Analysis

Another way to view a user's assigned training is to go to that user's Training Analysis page.

noreply@sumtotal.com

Username: 1726532

Required: 0

Recommend

Self-Reported Training

PROFILE

Training Analysis

Training Schedule

Training Transcript

0 INCOMPLETE

1. Locate the user you wish to find out more information about in your list of direct reports or viewable users.
2. Click the drop down arrow next to the white **Profile** button.
3. Click **Training Analysis**.
4.  This will launch **Emulation mode**, which allows you to view Learning details about your managed users. You know you are in emulation mode by the orange "eye" in the top menu bar where the "Self" icon would typically display.
5. The page provides an overview of the user's currently assigned training, the due date for each training, and current assignment status. Click the **View** drop down menu to see additional information.

Training Analysis

Secure | https://uc.stage.sumtotal.host/core/pillarRedirect?relyingParty=LM&red=https:%2F%2Fuc.stage.sumtotal.host%2Flearning%2Fapp

UNIVERSITY OF CALIFORNIA Learning Center

TRAINING ANALYSIS

This is a list of your required and recommended training. Use the View list to filter the activities that you see below.

Search: Help

Filter by: Required and recommended

View: All assigned training

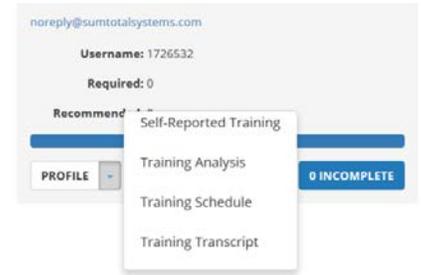
Selected Items: 0 | Records: 7

Name	Code	Priority	Assigned Date	Due Date	Last Completed Date	Expiration Date	Assignment Type	Assignment Status
eCourse:Assignment Reminder Test	NTEMINDERTEST06012015		6/1/2015	6/26/2015			Required	Overdue
eCourse:General Compliance Briefing 2012-2013	OP_ETHICS_2013		12/19/2016	1/24/2017	9/3/2016		Required	Attended
eCourse:Laser Safety	UCL002X-ECO		8/11/2016	8/16/2016			Required	Overdue
Test:Scientific Diving Techniques - Refresher Certification	SC-BDT-SDR0129		4/1/2015	4/1/2016	4/1/2015	4/1/2016	Required	Expired
eCourse:UC Cyber Security	SECURITY-RE-OP-ECO		3/21/2017	11/1/2017	11/1/2016	11/1/2017	Required	Acquired

Training Transcript

To view all completed training for a managed user, you can view their training transcript.

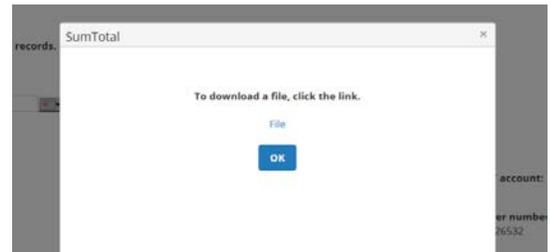
1. Locate the user you wish to find out more information about using the User Search function.
2. Click the drop down arrow next to the white **Profile** button.
3. Click **Training Transcript**.
4.  This will launch **Emulation mode**, which allows you to view Learning details about your managed users. You know you are in emulation mode by the orange “eye” in the top menu bar where the “Self” icon would typically display.
5. You will be taken directly to that user’s transcript. Select the timeframe you wish to review using the year or date range filters. Note the default view is for one year.



You can view the transcript or individual certificates of completion and export them to PDF.

To export the training transcript to PDF:

1. Click **Export to PDF** in the top right corner
2. Click **File** to download the PDF, and the **OK**.
3. The PDF will open in a new window.



To export individual certificates to PDF:

1. Click the certificate logo next to the course name.
2. Click **Export to PDF** and follow the steps above.

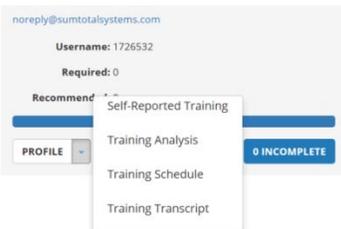
ACTIVITIES

Activity	Estimated Credit Hours	Start Date	Completion Date - Expiration Date	Score	Grade	Attended Duration	Code
 eCourse: UC Cyber Security Awareness Training - Refresher		12/22/2016	12/22/2016 - 12/22/2017			Days: 0, Hours: 0, Minutes: 31, Seconds: 17	SECURITY-RE-OP-ECO
 ILT Class: Open Session Staff Training 2016-17 Goal Setting		11/10/2016	11/10/2016				UCOP_GS_Staff1617_OP110616
 eCourse: UC HIPAA Privacy and Security Training		7/18/2016	7/18/2016 - 7/18/2018			Days: 0, Hours: 0, Minutes: 12, Seconds: 20	OP_HIPAA
 eCourse: UC Sexual Violence and Sexual Harassment		7/18/2016	7/18/2016 - 7/18/2018	100	100	Days: 0, Hours: 2,	AB1825-OP-ECO-2016

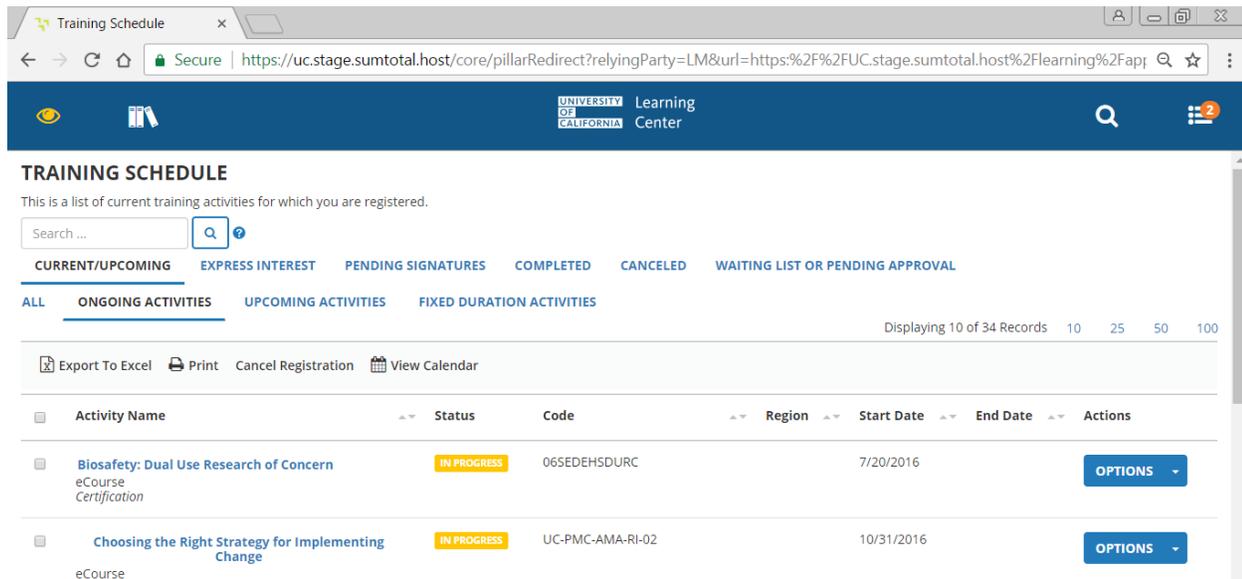
View Training Schedule

You can view a managed user’s training schedule to see their current registrations and progress.

1. Locate the individual you wish to view.
2. Click on the drop down arrow next to the **Profile** button and select **Training Schedule**.



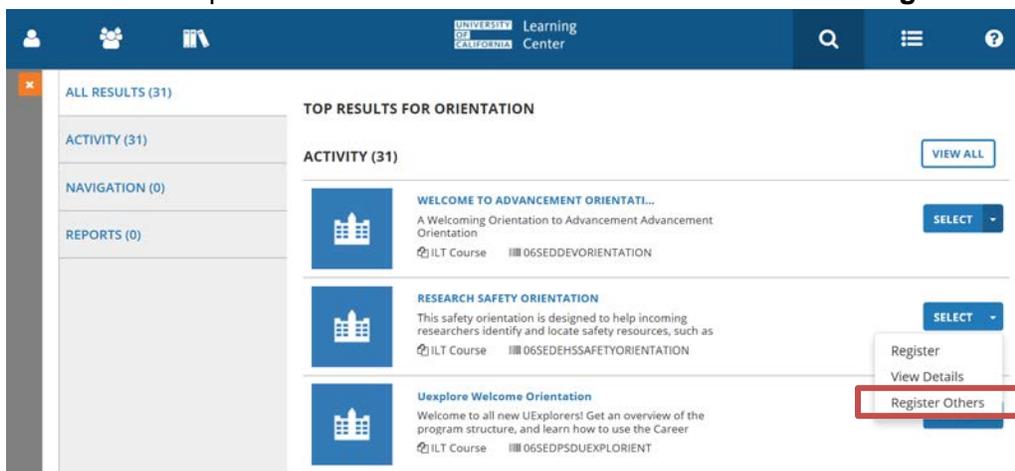
- This will launch **Emulation mode**, which allows you to view Learning details about your managed users. You know you are in emulation mode by the orange “eye” in the top menu bar where the “Self” icon would typically display.
- Now you can see that user’s registrations and other canceled, in progress or completed training.



Register Users

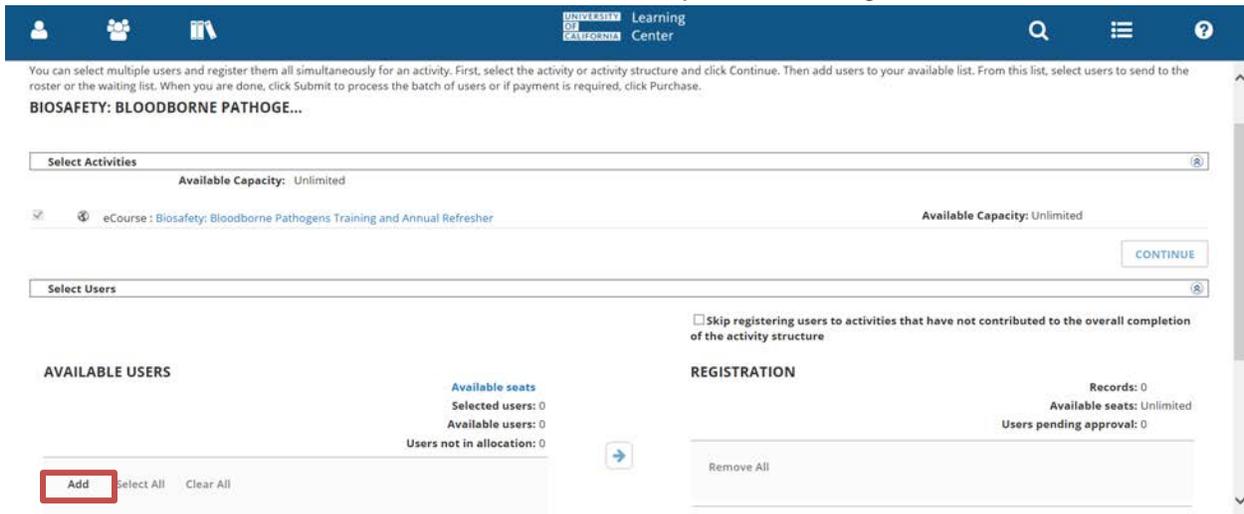
A manager has the ability to register their managed users for courses. It is recommend to register users for in-person training and assign online training. To register managed users:

- Locate the activity you wish to register by using the **Catalog** or **Search** functions.
- Click on the drop down arrow next to the **Select** button and select **Register Others**.

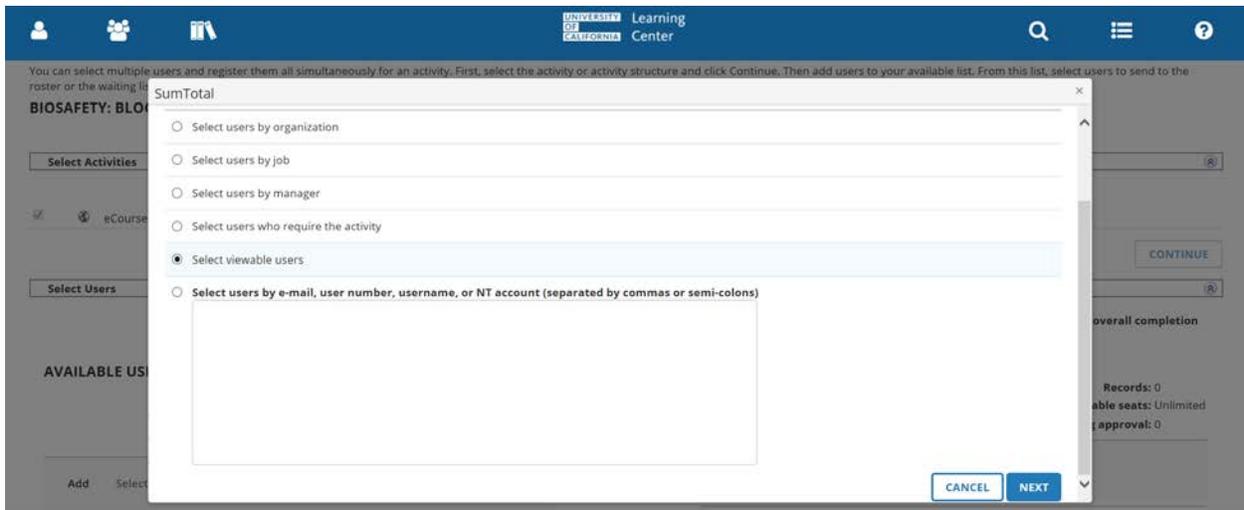


- If this is online course, click **Continue** to add users. If this is an in-person training, you will need to select the offering you wish them to attend first before you can click **Continue**.

4. Click **Add** under Available Users to locate the users you wish to register.



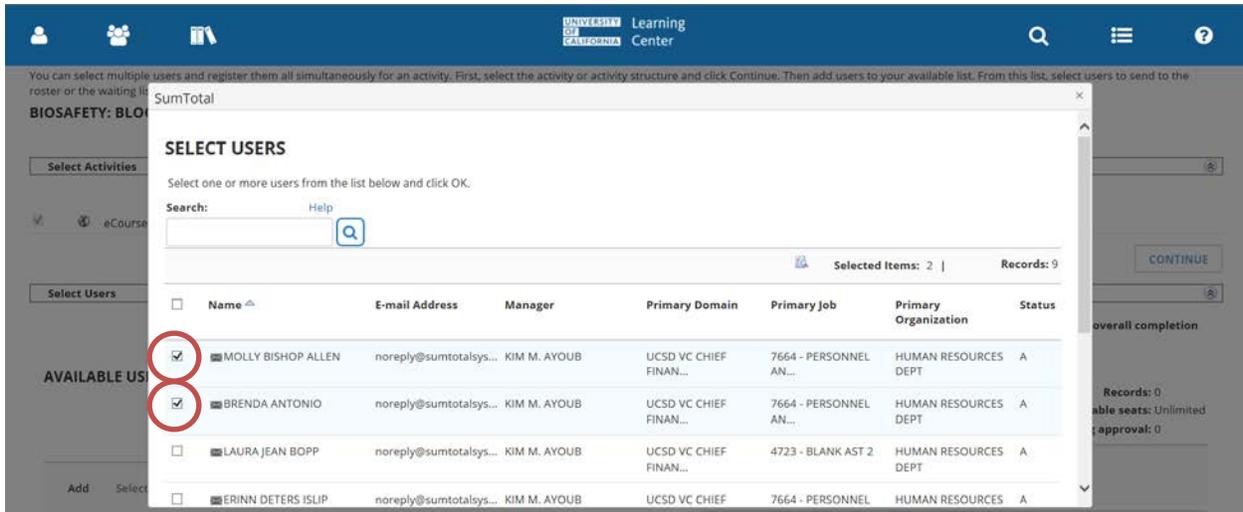
5. There are several options to narrow down the users you wish to add. As Manager, the only option that will be relevant is **Select Viewable Users**.



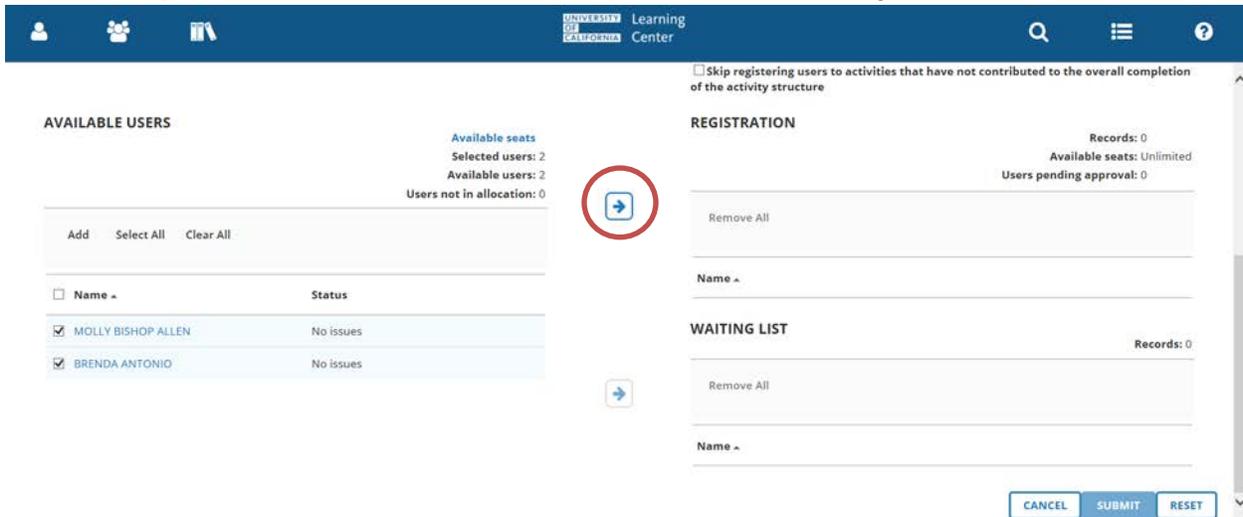
6. Click **Next**. You now have the option to:

- Type a user's name in the search box and click the **Arrow** button.
- Browse the list of users for individuals you wish to register.
- Click **Select All** at the bottom of the page to select all active users or select the top box to select all users on the current page.

7. Select the **check box** next to the users/users name that you wish to register. Click **OK** at the bottom to continue.



8. Click the **Top Arrow Button** to move the selected users over to Registration.



9. Click **Submit** once all users you wish have been moved over.
10. The users are now registered for the activity.

Note: If the activity is in-person they will receive an email notification of their registration. If the activity is online there is no registration notification, so you may want to inform them they need to complete the training.

Manage Assignments

A manager has the ability to assign their managed users for courses. Manager assignments are recommended for individual assignments only. To assign managed users:

1. Locate the activity you wish to register by using the **Catalog** or **Search** functions.

- Click on the drop down arrow next to the **Select** button and select **Manage Assignments**.

Hand Hygiene ★★★★★
The most important and most basic technique in preventing and controlling transmission of infection is

Hand Hygiene and Garb ★★★★★
Pharmacy Techs and Pharmacists competency and assessment to show that they understand the proper

SELECT ▾

- Start
- View Details
- Manage Assignments**
- Register Others

- To add a new assignment, click **Add**.

MANAGE USER ASSIGNMENTS FOR Hand Hygiene

List of users assigned to this activity.

Search [] [Q]

Last Processed: Wednesday, June 21, 2017 9:32:52 PM PDT Current Assignments ▾

Refresh **Add** Print Export

All Viewable Users ▾

Show all assignments (1)

Filter by:

- Assignment Status
- Assignment Type
- Assignment By

<input type="checkbox"/>	Name ^	User Number	Assignment Date	Due date	Priority	Type
<input type="checkbox"/>	ANNE M AGUILAR	1843302	2/24/2016	-		Recommen

Records 1-1 of 1 Page 1 of 1

EDIT REMOVE

- Select the user(s) you wish to assign the activity to (Note: You may need to click All Viewable Users if you do not have Direct Reports) and click **Next**.

Manage Assignments

SELECT USERS

Select either one or all users to set assignment options.

Search [] [Q]

Direct Reports

All Viewable Users

<input type="checkbox"/>	Name ^	User Number	Primary Job	Manage
<input type="checkbox"/>	KAREN AARON	DV-KAARON	CV JOB	
<input checked="" type="checkbox"/>	MARK J AARON	1970431	0520 - SYS ADM 4	RICHARD

5. Set the **Type** (Required or Recommended) and choose a **Start Date**

Manage Assignments

EDIT ASSIGNMENTS FOR Hand Hygiene

Select either one or all users to set assignment options.

Select: All | None Sort by: Name

MARK J AARON ⓘ
Type:Recommended | Status:Assigned
Due Date:No Due Date

Assignment Options:
Selected users (1)

Type:
 Required
 Recommended

Ignore Previous Completions
[Calendar icon]

Start Date:
 Today
 [] Days from today
 On [Calendar icon]

Time zone:
UTC [Dropdown]

Priority:
None [Dropdown]

6. Scroll down to set the **Due Date** and click **Apply to Selection**, then click **Done**.

Due Date:
 No Due Date
 Within 30 Days
 By [Calendar icon]

Time zone:
UTC [Dropdown]

Assignment Notes:
[Text area]

Status:
Assigned [Dropdown]

APPLY TO SELECTION

CANCEL **BACK** **DONE**

7. Under the **Manage Assignments** screen, you can **Edit** or **Remove** the assignment

Manage Assignments

MANAGE USER ASSIGNMENTS FOR Hand Hygiene
List of users assigned to this activity.

Search

Last Processed: Wednesday, June 21, 2017 9:32:52 PM PDT Current Assignments

Refresh Add

All Viewable Users

Show all assignments (2)

Filter by:

- Assignment Status
- Assignment Type
- Assignment By

<input type="checkbox"/>	Name ^	User Number	Assignment Date	Due date	Priority	Type
<input type="checkbox"/>	MARK J AARON	1970431	6/21/2017	7/22/2017		Require
<input type="checkbox"/>	ANNE M AGUILAR	1843302	2/24/2016	-		Recomm

Records 1-2 of 2 Page 1 of 1

Note: Users should receive an assignment notification later that night. If you need to assign training to staff based on job code / department and want to include transfers/new hires in the future, please contact the appropriate training group of the activity to setup an **Audience** to make the assignment.

Contacts

UC Davis Campus:

- **Staff Development and Professional Services**
sdps@ucdavis.edu
530-752-1766

UC Davis Health:

- **Human Resources Training & Development**
HS-T-D@ucdavis.edu
916-734-2676
- **Center for Professional Practice of Nursing**
hs-cppn@ucdavis.edu
916-734-9790
- **Information Technology Education**
hs-itedu@ucdavis.edu
- **Help Desk**
916-734-HELP (4357)