LMS for Managers

Overview

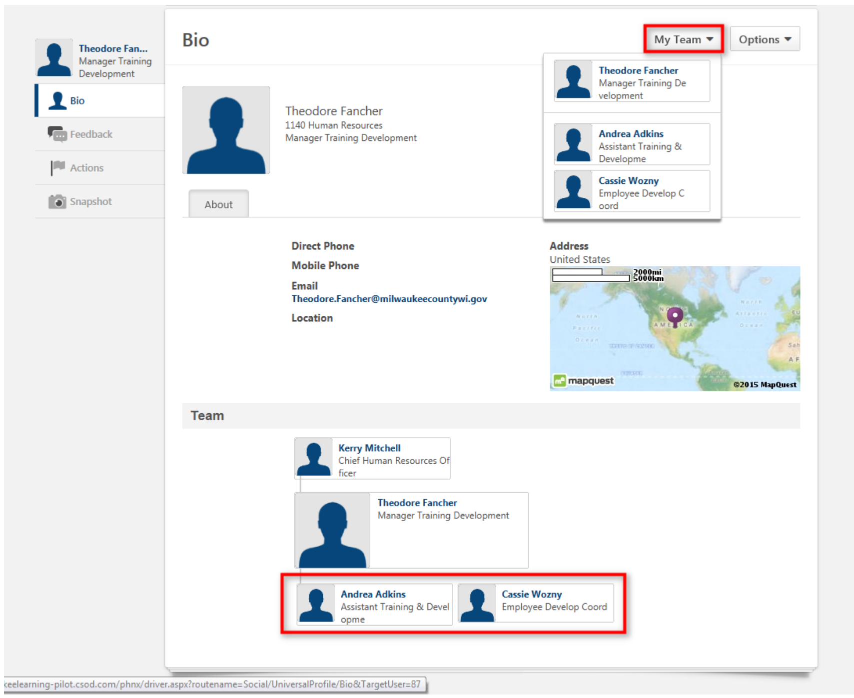
The Milwaukee County Training and Development Center is the new cloud-based Learning Management System (LMS) for Milwaukee County. The LMS will allow you to track your or your direct reports' training, register for classes, complete online courses, add external training, and run reports. This handout will cover the following topics:

- *Viewing Your Team*
- *Viewing Employee Transcripts*
- *Assigning Training*
- *Approving and Denying Training*
- *Viewing Dashboards*
- *Viewing Reports*
- *Setting Up Out of Office*

Viewing Your Team

To view your team, including your universal profile, please complete the following steps:

Step	Action
1	From the main menu, select **My Team**.  **Result**: Your universal bio page will display.

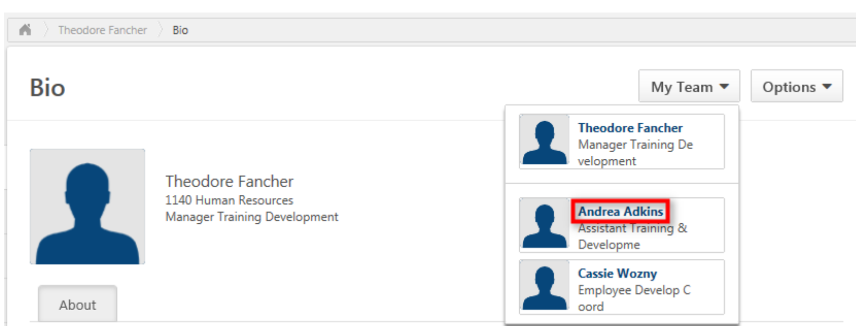
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Scroll down to see the employees that are part of your team, or click the My Team button in the upper right-hand corner of the page.

Note: You can take actions on your direct reports by clicking on their names, as you will see in the next section.</td></tr>
</table>

Viewing Employee Transcripts

To view the transcripts of your direct reports, complete the following steps:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click My Team on the Main Menu.

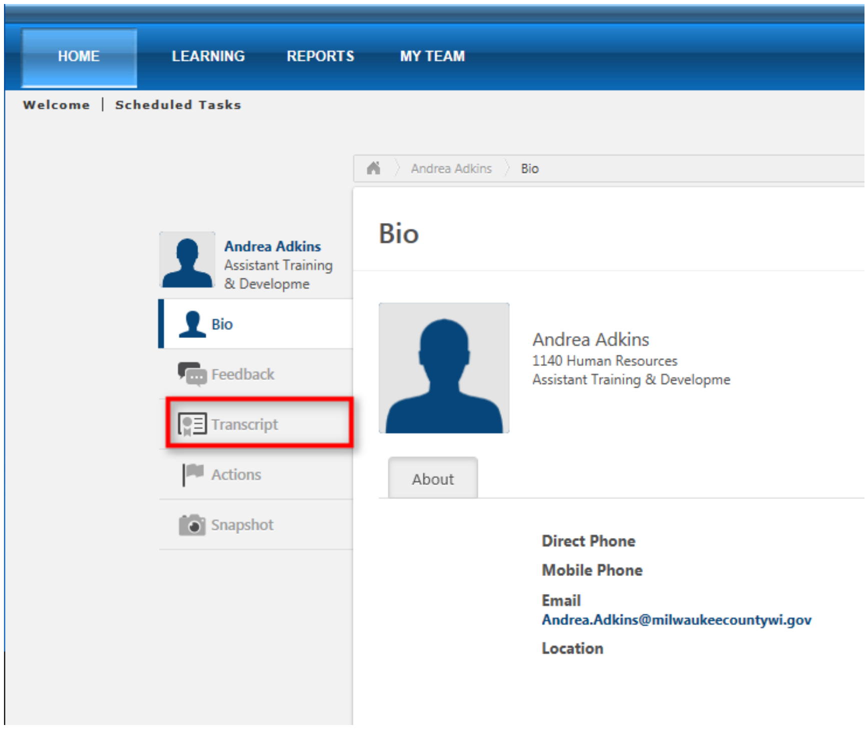
Result: Your universal bio page will display.</td></tr>
<tr><td>2</td><td>Click the name of the direct report whose transcript you would like to view.



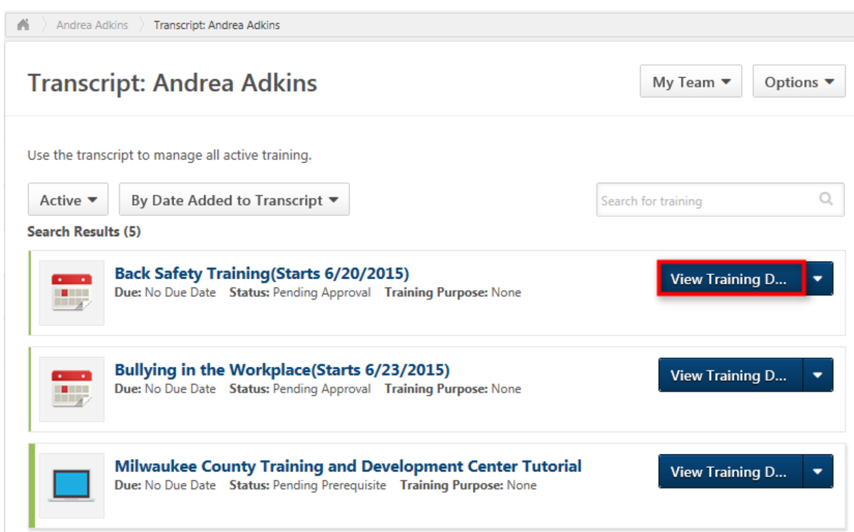
Result: Your direct report’s bio page will display.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

Click the **Transcript** link to the left of your direct report's bio.



Result: Your direct report's transcript will display.

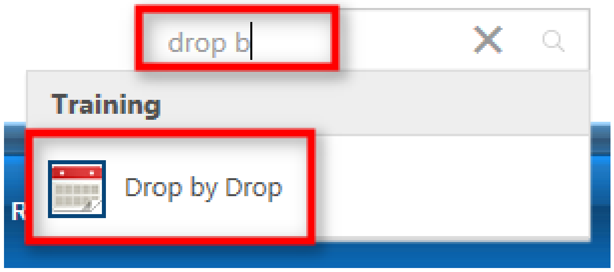
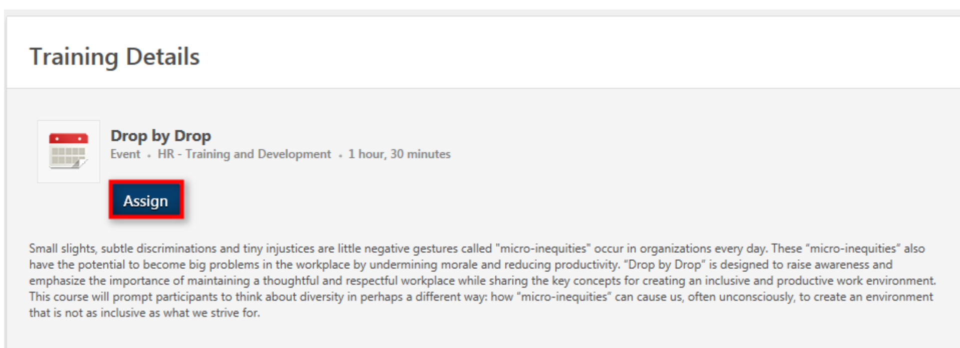


Note: You can view details by clicking the **View Training Details** button to the right of each learning object.

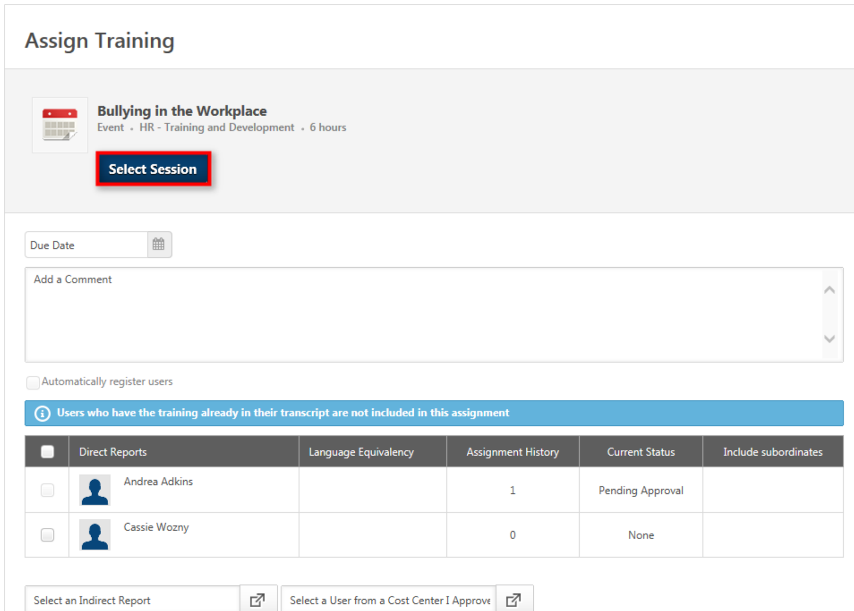
</td></tr>
</table>

Assigning Training

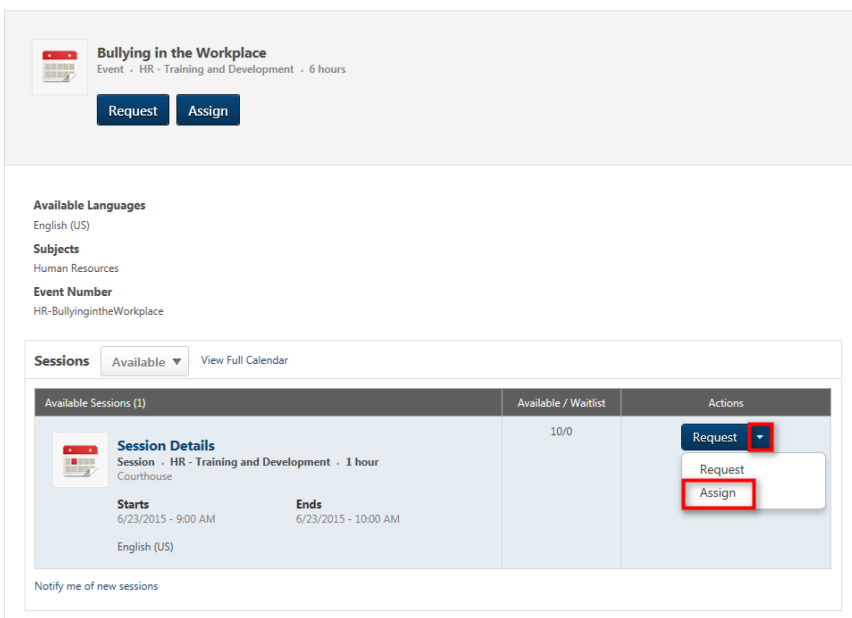
To assign training to your employee, please complete the following steps:

Step	Action
1	Type in the name of the training you are looking for in the upper right-hand corner search field and then click the training you want to assign. 
2	Click the **Assign** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>If this is for classroom training with multiple sessions, you will need to first select a session by clicking the Select Session button.

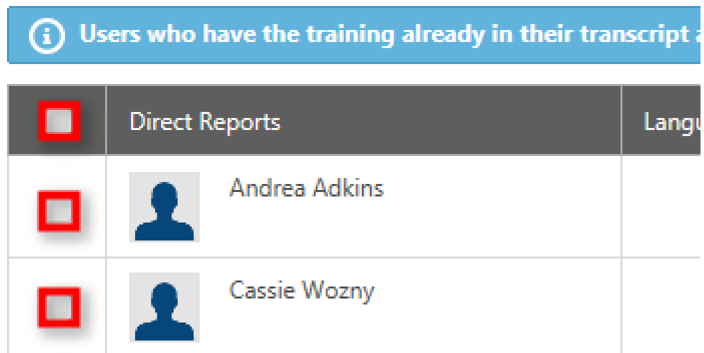


</td></tr>
<tr><td>4</td><td>From the drop-down menu to the right of the Request button to the rest of the session you want to assign, click Assign.

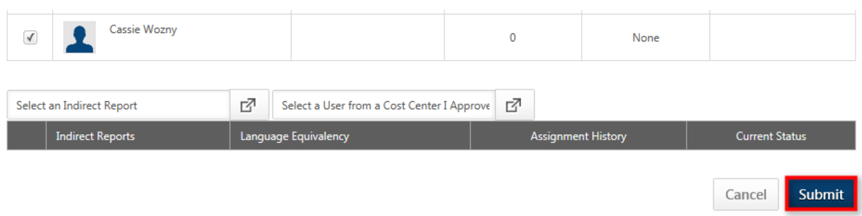


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>You can either click the checkbox to the left of each direct report to whom you want to assign this training, or you can click the checkbox to the left of Direct Reports to assign it to all of your direct reports.



Note: Your direct report(s) will receive an email regarding the assignment of training.</td></tr>
<tr><td>6</td><td>Click the Submit button to finish assigning the training.



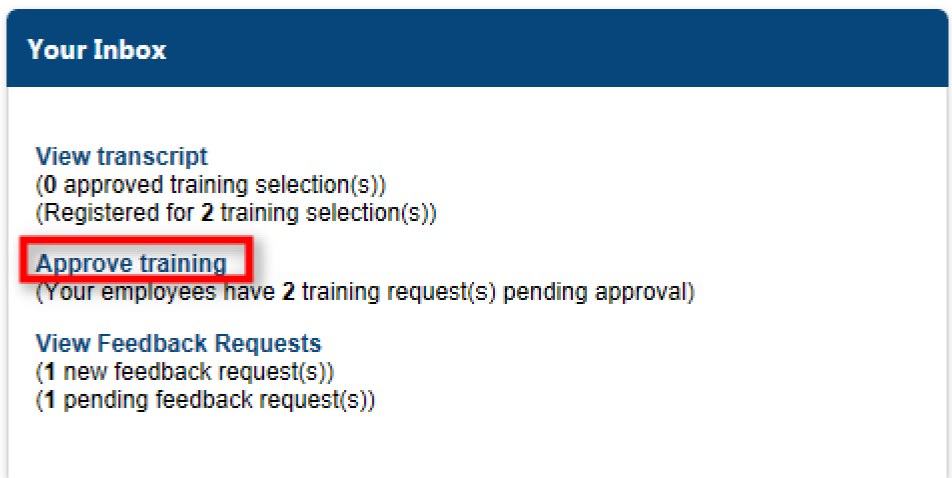
Note: If the training is an online course or another type of learning object that does not require a session, you can just skip Steps 5 and 6.</td></tr>
</table>

Approving and Denying Training

Your direct reports can request training. For most instructor-led training courses and some online courses, you will need to approve the request before your direct report can register for or attend training.

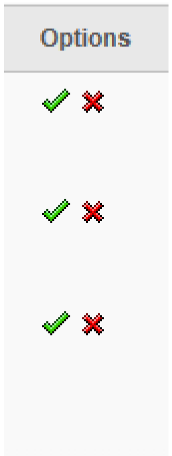
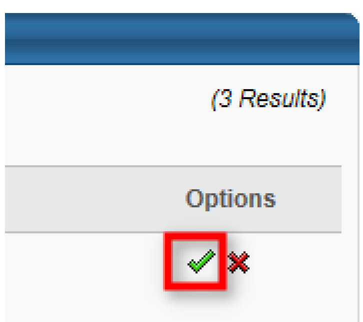
When there is a training request, you will receive an email directing you to log into the LMS and approve or deny the request. To approve or deny training requests, complete the following steps:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Welcome Page under Your Inbox, you will see how many training requests you need to approve or deny. Click the Approve training link.

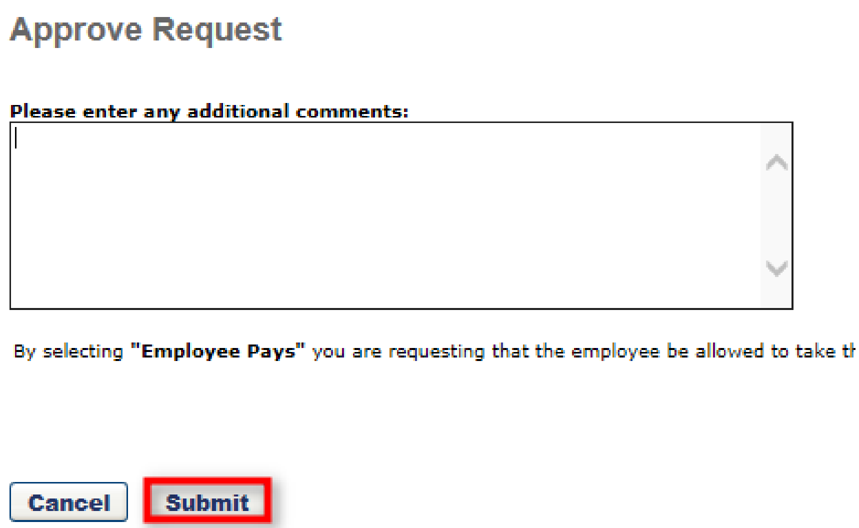


Another way to access the next page is on the Main Menu. Click My Team and then Manage Employee Learning below it, and then click Manage Pending Requests.

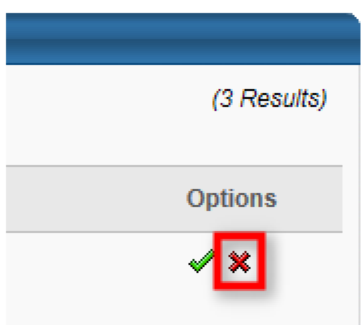
Result: The View Pending Requests page will display.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>If there are any pending requests, you will see the requests, with your employee’s name to the left, followed by the name of and information about the course, and finally a green checkmark and a red x under Options.
</td></tr>
<tr><td>3</td><td>Determine if you are going to approve or deny training, usually based on coverage, purpose, and necessity.
<table>
<tr><th>If…</th><th>Then</th></tr>
<tr><td>You want to approve the training request</td><td>Continue to the next step.</td></tr>
<tr><td>You want to deny the training request</td><td>Skip to Step 7.</td></tr>
</table></td></tr>
<tr><td>4</td><td>To approve the request, click the green checkmark to the right of the course request you want to approve.

Result: The Approve Request page will display.</td></tr>
</table>

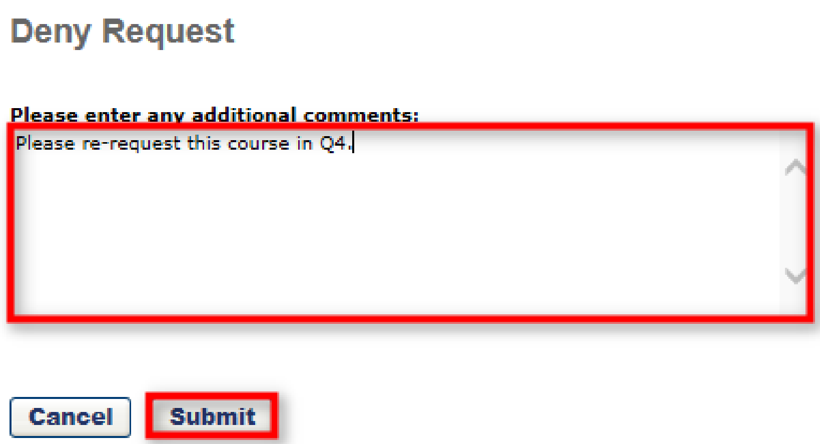
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>You can enter a comment if you wish in the text field, but to complete the approval, click the Submit button.



Result: The request will disappear from the page, and your direct report will receive an email letting him/her know that the request has been approved.</td></tr>
<tr><td>6</td><td>To deny the request, click the red x to the right of the course request you want to deny.


</td></tr>
</table>

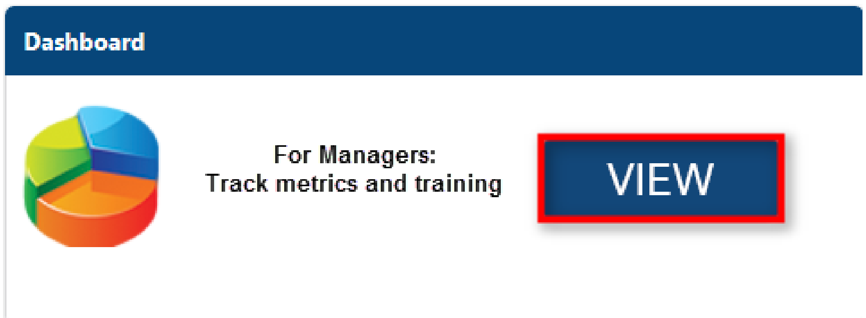
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>You can enter a comment in the field. For example, you can suggest another quarter or month, another class, or another session. You can also leave this field blank. Then click the Submit button.

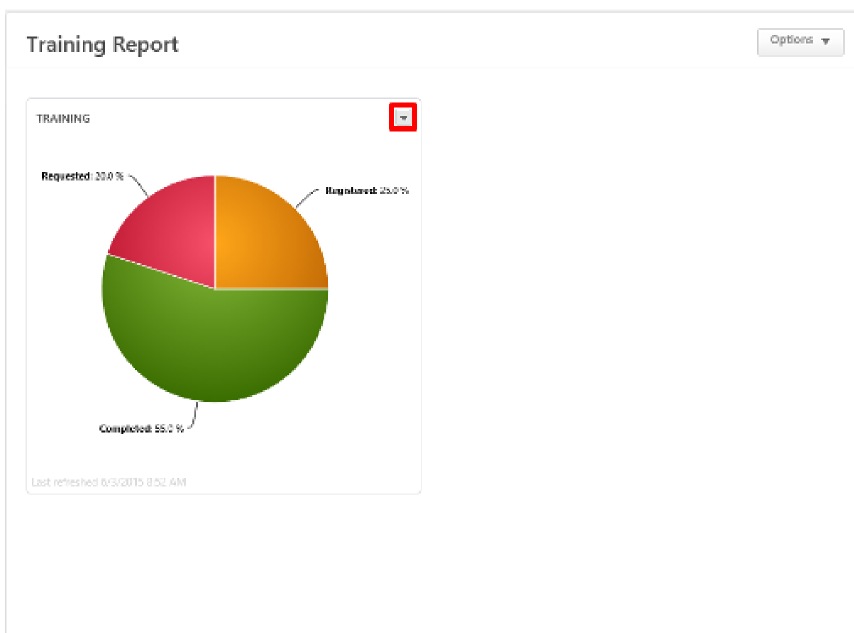


Result: The request will disappear from the page, and your direct report will receive an email letting him/her know that the request has been denied.</td></tr>
</table>

Viewing Dashboards

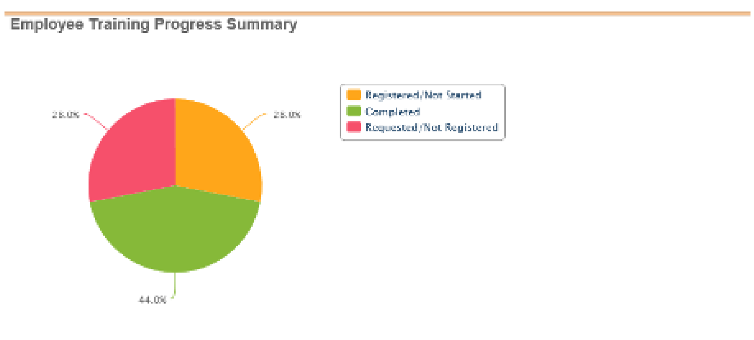
In addition to viewing individual transcripts, you can also view pre-configured dashboards. To view a dashboard, complete the following steps:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Scroll down on the Welcome Page and click the View button in the Dashboard widget.


Result: The Employee Training Progress Pie Chart will display.</td></tr>
<tr><td>2</td><td>Click the drop-down arrow to the right of the title.

</td></tr>
</table>

Step	Action
3	Click the **View Details** link.

Result: You will see additional details regarding the training progress for your direct reports.

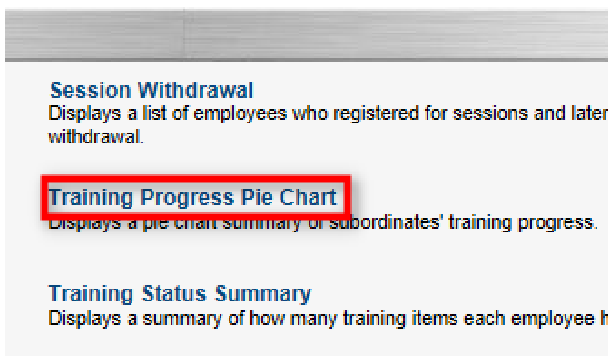


USER ID	USER	TYPE	TITLE	TRAINING PROVIDER	STATUS
123835	Wozny, Cassie	Online Class	Storyline Trial SCORM 1.2	County of Milwaukee, WI	Pending Acknowledgement
123835	Wozny, Cassie	Event	Courageous Dialogue	Milwaukee County Leadership Excellence	Approved
123835	Wozny, Cassie	Online Class	Accident Investigation with Storyline	County of Milwaukee, WI	Registered
123835	Wozny, Cassie	Online Class	Hybrid Vehicle Safety - Aegis	County of Milwaukee, WI	Completed
123835	Wozny, Cassie	Session	Accident Investigation - Aegis	Human Resources	Registered
123835	Wozny, Cassie	Session	SharePoint Online Training	Learning Admin Test Vendor	Registered
123835	Wozny, Cassie	Online Class	Storyline Trial 4	County of Milwaukee, WI	Completed
123835	Wozny, Cassie	Curriculum	New Hire 2	Human Resources	Approved
123835	Wozny, Cassie	Event	Employee Safety 2	Milwaukee County Leadership Excellence	Approved
123835	Wozny, Cassie	Online Class	Emergency Action Plan - Aegis	County of Milwaukee, WI	Completed
123835	Wozny, Cassie	Online Class	Storyline SCORM Testing 2	County of Milwaukee, WI	Registered
142371	Adkins, Andrea	Online Class	Storyline SCORM Testing 2	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Online Class	Emergency Action Plan - Aegis	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Event	Employee Safety 2	Milwaukee County Leadership Excellence	Approved
142371	Adkins, Andrea	Curriculum	New Hire 2	Human Resources	Registered
142371	Adkins, Andrea	Session	New Employee Orientation	Human Resources	Pending Approval
142371	Adkins, Andrea	Online Class	Storyline Trial 4	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Material	Titan CMS Staff Training Guide	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Online Class	GHS Hazard Communication - Aegis	County of Milwaukee, WI	Registered
142371	Adkins, Andrea	Online Class	Accident Investigation with Storyline	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Event	Courageous Dialogue	Milwaukee County Leadership Excellence	Denied
142371	Adkins, Andrea	Online Class	Storyline Trial SCORM 1.2	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Session	Harassment Awareness	Human Resources	Approved
142371	Adkins, Andrea	Online Class	Protect Your Back - Aegis	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Session	Conflict Management	Milwaukee County Leadership Excellence	Registered

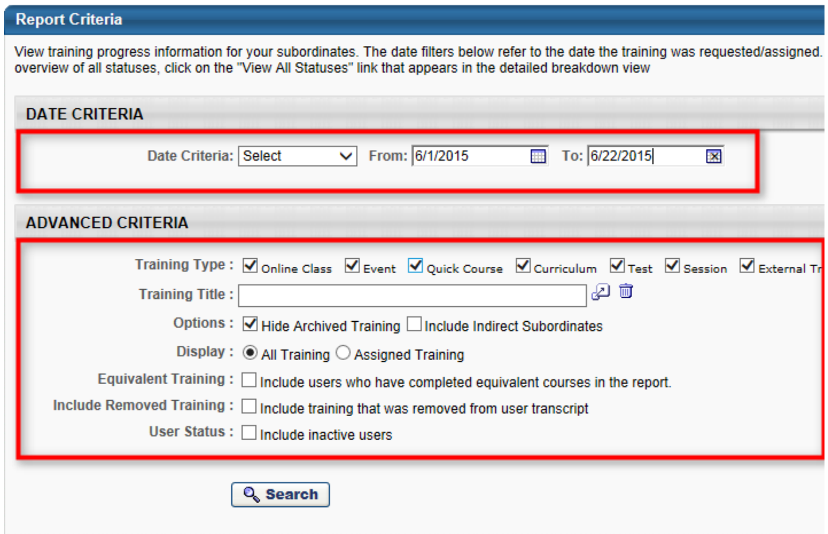
Viewing Reports

To view additional training reports, complete the following steps:

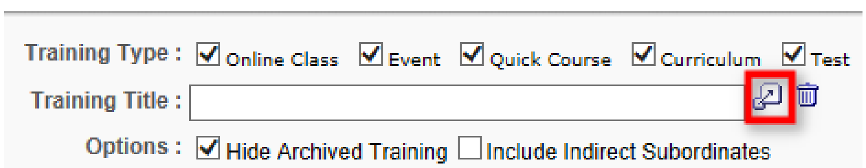
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Main Menu, click Reports and then Standard Reports below it.


Result: The Reports page will display. In this example we are going to use the Training Progress Pie Chart report.</td></tr>
<tr><td>2</td><td>Click the title of the report you want to run.

</td></tr>
</table>

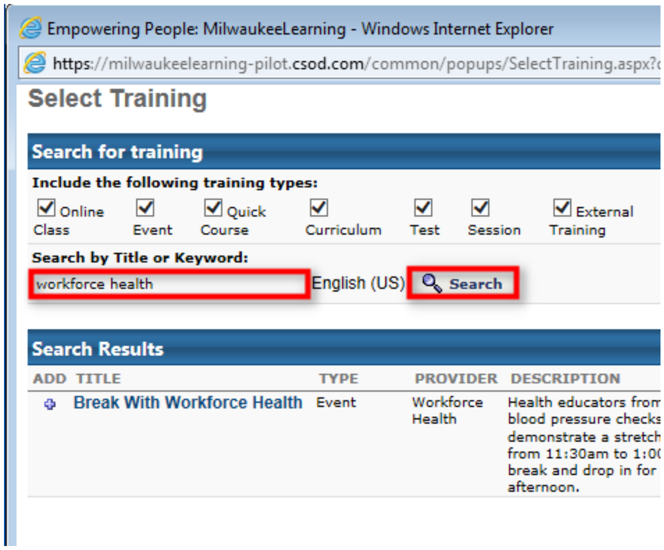
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Depending on the report, you may have to configure several fields.

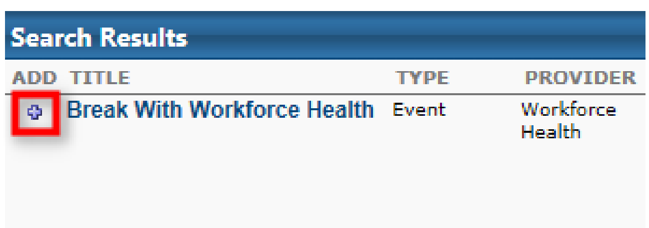


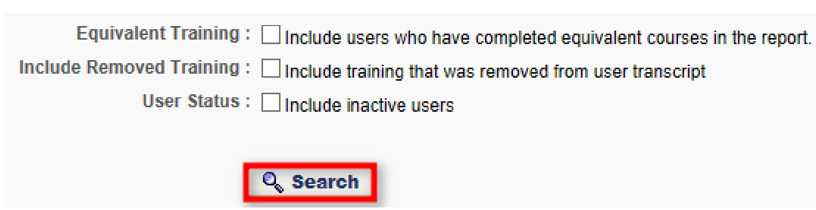
</td></tr>
<tr><td>4</td><td>If you see a button that looks like a small square pointing toward a larger square, click it to have a search window open.



Note: You cannot type directly into this field before clicking the button. You must click the button to open the search window.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Type the name of the training in the Search by Title or Keyword field and then click the Search button, or click the Search button to see all training options.


</td></tr>
<tr><td>6</td><td>Click the blue plus sign to the left of the title.


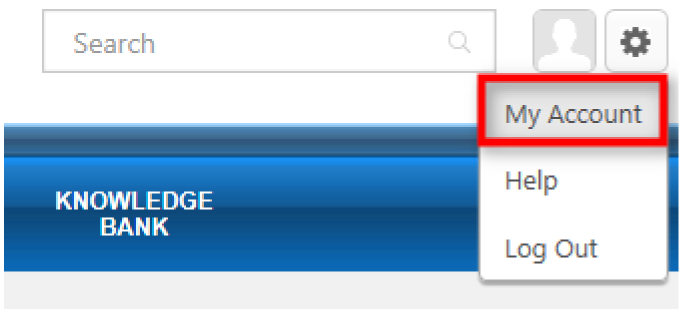
</td></tr>
<tr><td>7</td><td>Click the Search button.


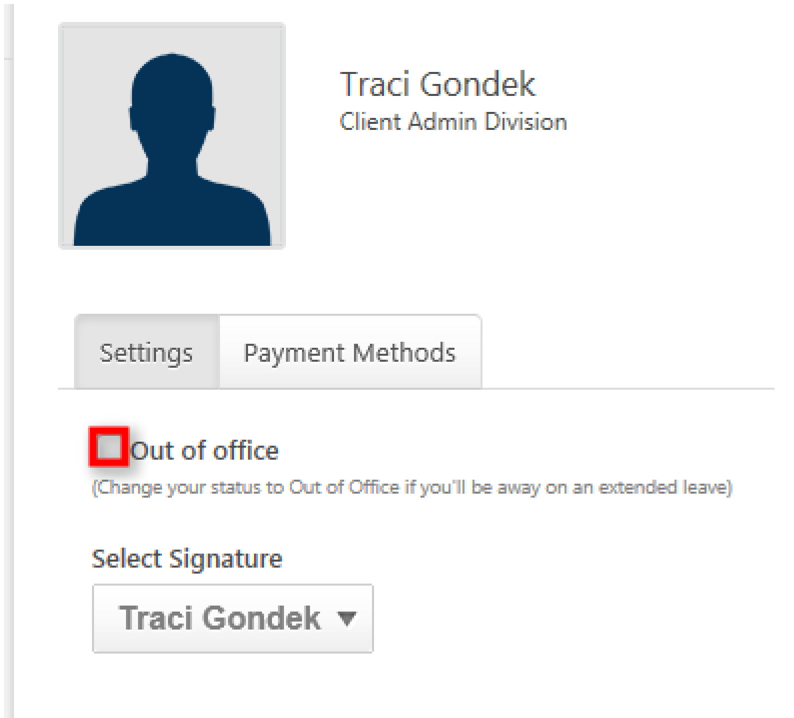
</td></tr>
<tr><td>8</td><td>Finish filling in any fields, and then click the Search button.

Result: The report will display.</td></tr>
</table>

Setting Up Out of Office

If you are going to be away for a length of time and want your employees' training requests to go to your manager for approval, complete the following steps:

Step	Action
1	Click the **Options** icon in the upper right-hand corner. 
2	Click the **My Account** link. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Check the Out of office checkbox.


Note: When you next log in to the LMS, you will be prompted to uncheck the checkbox and will start receiving training requests again.</td></tr>
</table>