



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](#)

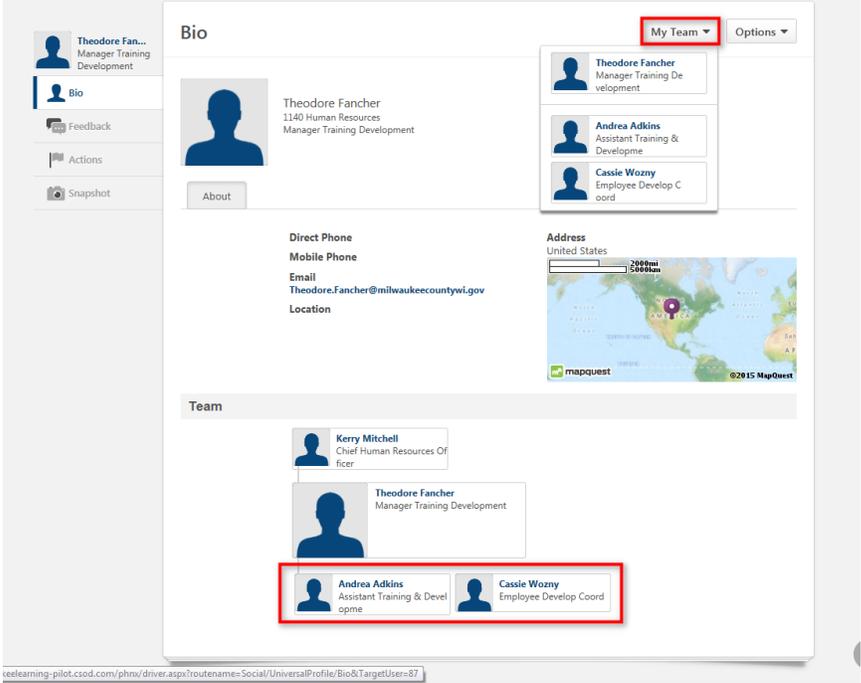
Viewing Your Team

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

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



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Step	Action
2	<p data-bbox="451 321 1344 380">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.</p> <div data-bbox="451 411 1312 1094"><p data-bbox="451 1077 873 1094">celearning-pilot.csod.com/phm/driver.aspx?routename=Social/UniversalProfile/Bio&TargetUser=57</p></div> <p data-bbox="451 1125 1386 1182">Note: You can take actions on your direct reports by clicking on their names, as you will see in the next section.</p>



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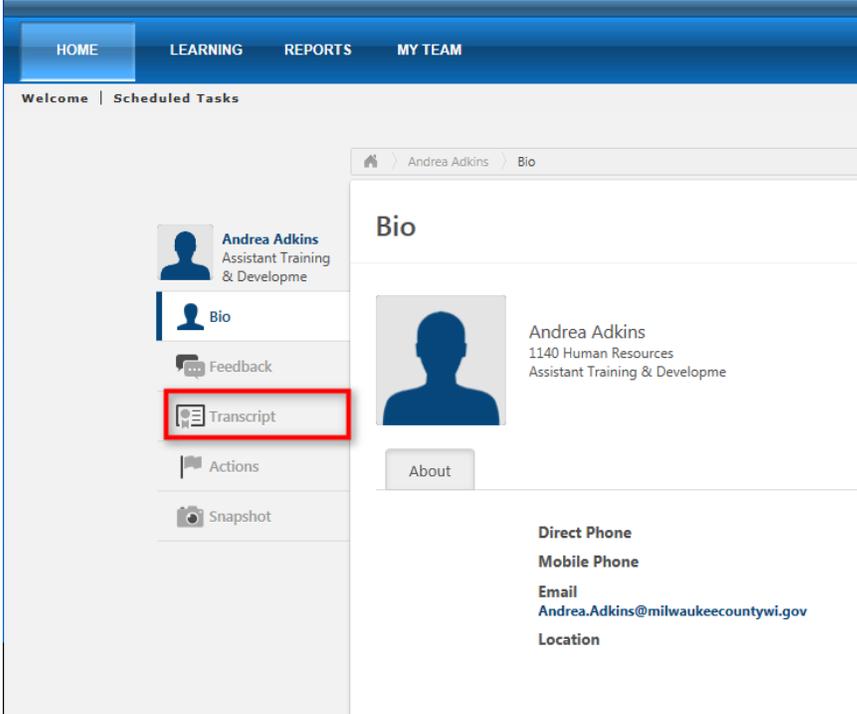
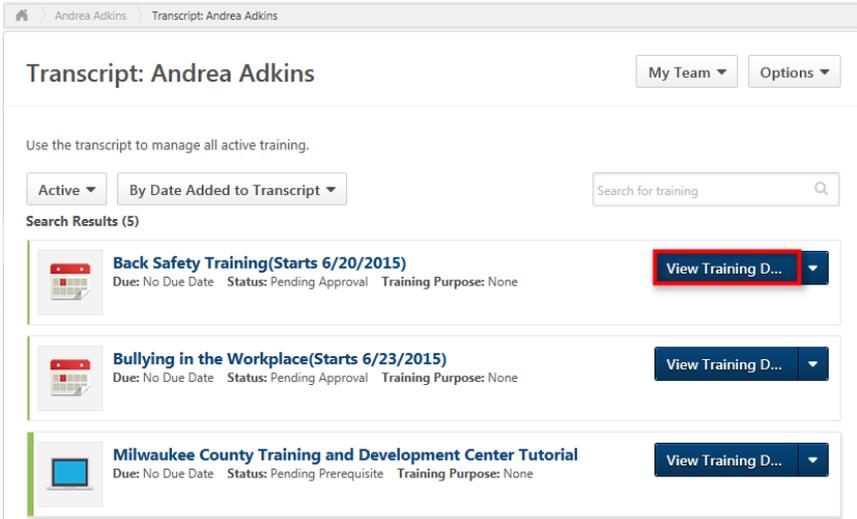
Viewing Employee Transcripts

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

Step	Action
1	<p>Click My Team on the Main Menu.</p>  <p>Result: Your universal bio page will display.</p>
2	<p>Click the name of the direct report whose transcript you would like to view.</p>  <p>Result: Your direct report's bio page will display.</p>



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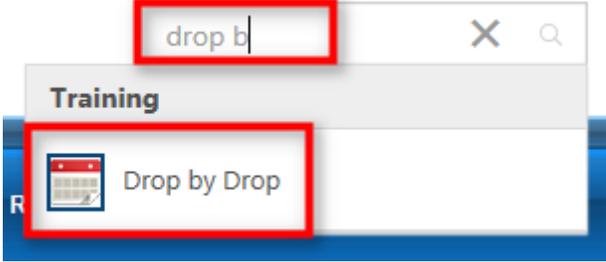
Step	Action
3	<p>Click the Transcript link to the left of your direct report's bio.</p>  <p>Result: Your direct report's transcript will display.</p>  <p>Note: You can view details by clicking the View Training Details button to the right of each learning object.</p>



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Assigning Training

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

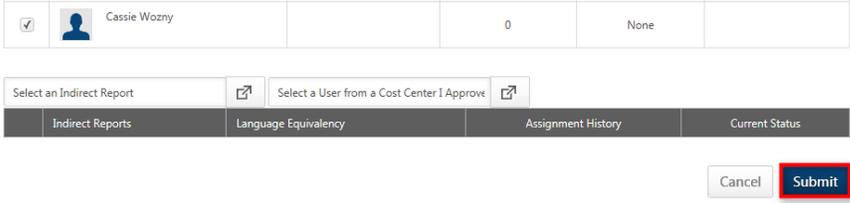
Step	Action
1	<p>Type in the name of the training you are looking for in the upper right-hand corner search field and then click the training you want to assign.</p> 
2	<p>Click the Assign button.</p> 



Step	Action																		
3	<p>If this is for classroom training with multiple sessions, you will need to first select a session by clicking the Select Session button.</p> <div data-bbox="451 411 1308 1016"> <p>Assign Training</p> <p>Bullying in the Workplace Event · HR - Training and Development · 6 hours</p> <p>Select Session</p> <p>Due Date <input type="text"/></p> <p>Add a Comment <input type="text"/></p> <p><input type="checkbox"/> Automatically register users</p> <p>Users who have the training already in their transcript are not included in this assignment</p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Direct Reports</th> <th>Language Equivalency</th> <th>Assignment History</th> <th>Current Status</th> <th>Include subordinates</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td> Andrea Adkins</td> <td></td> <td>1</td> <td>Pending Approval</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td> Cassie Wozny</td> <td></td> <td>0</td> <td>None</td> <td></td> </tr> </tbody> </table> <p>Select an Indirect Report <input type="text"/> <input type="button" value="🔗"/> Select a User from a Cost Center I Approve <input type="text"/> <input type="button" value="🔗"/></p> </div>	<input type="checkbox"/>	Direct Reports	Language Equivalency	Assignment History	Current Status	Include subordinates	<input type="checkbox"/>	Andrea Adkins		1	Pending Approval		<input type="checkbox"/>	Cassie Wozny		0	None	
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<input type="checkbox"/>	Andrea Adkins		1	Pending Approval															
<input type="checkbox"/>	Cassie Wozny		0	None															
4	<p>From the drop-down menu to the right of the Request button to the rest of the session you want to assign, click Assign.</p> <div data-bbox="451 1140 1308 1759"> <p>Bullying in the Workplace Event · HR - Training and Development · 6 hours</p> <p>Request Assign</p> <p>Available Languages English (US)</p> <p>Subjects Human Resources</p> <p>Event Number HR-BullyingintheWorkplace</p> <p>Sessions Available <input type="button" value="View Full Calendar"/></p> <table border="1"> <thead> <tr> <th>Available Sessions (1)</th> <th>Available / Waitlist</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td> <p>Session Details Session · HR - Training and Development · 1 hour Courthouse</p> <p>Starts 6/23/2015 - 9:00 AM Ends 6/23/2015 - 10:00 AM</p> <p>English (US)</p> <p>Notify me of new sessions</p> </td> <td>10/0</td> <td> <p>Request <input type="button" value="⌵"/></p> <p>Request</p> <p>Assign</p> </td> </tr> </tbody> </table> </div>	Available Sessions (1)	Available / Waitlist	Actions	<p>Session Details Session · HR - Training and Development · 1 hour Courthouse</p> <p>Starts 6/23/2015 - 9:00 AM Ends 6/23/2015 - 10:00 AM</p> <p>English (US)</p> <p>Notify me of new sessions</p>	10/0	<p>Request <input type="button" value="⌵"/></p> <p>Request</p> <p>Assign</p>												
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Step	Action
5	<p>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.</p>  <p>Note: Your direct report(s) will receive an email regarding the assignment of training.</p>
6	<p>Click the Submit button to finish assigning the training.</p>  <p>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.</p>



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Approving and Denying Training

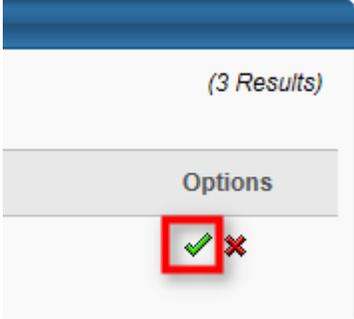
Your direct reports can request training. For most instructor-led training courses and some online courses, you will need to approve the request before your direct report can register for or attend training.

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:

Step	Action
1	<p data-bbox="451 630 1408 688">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.</p> <div data-bbox="457 730 1393 1201" style="border: 1px solid #ccc; padding: 10px;"> <p data-bbox="479 751 620 783">Your Inbox</p> <p data-bbox="485 863 889 947"> View transcript (0 approved training selection(s)) (Registered for 2 training selection(s)) </p> <p data-bbox="485 961 1144 1024"> Approve training (Your employees have 2 training request(s) pending approval) </p> <p data-bbox="485 1050 828 1134"> View Feedback Requests (1 new feedback request(s)) (1 pending feedback request(s)) </p> </div> <p data-bbox="451 1255 1396 1344">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.</p> <p data-bbox="451 1375 1112 1402">Result: The View Pending Requests page will display.</p>



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Step	Action						
2	<p>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.</p> 						
3	<p>Determine if you are going to approve or deny training, usually based on coverage, purpose, and necessity.</p> <table border="1" data-bbox="451 1020 1308 1178"> <thead> <tr> <th data-bbox="451 1020 878 1052">If...</th> <th data-bbox="878 1020 1308 1052">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="451 1052 878 1115">You want to approve the training request</td> <td data-bbox="878 1052 1308 1115">Continue to the next step.</td> </tr> <tr> <td data-bbox="451 1115 878 1178">You want to deny the training request</td> <td data-bbox="878 1115 1308 1178">Skip to Step 7.</td> </tr> </tbody> </table>	If...	Then	You want to approve the training request	Continue to the next step.	You want to deny the training request	Skip to Step 7.
If...	Then						
You want to approve the training request	Continue to the next step.						
You want to deny the training request	Skip to Step 7.						
4	<p>To approve the request, click the green checkmark to the right of the course request you want to approve.</p>  <p>Result: The Approve Request page will display.</p>						



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Step	Action
5	<p>You can enter a comment if you wish in the text field, but to complete the approval, click the Submit button.</p> <p>Approve Request</p> <p>Please enter any additional comments:</p> <div data-bbox="467 541 1247 726"><input type="text"/></div> <p>By selecting "Employee Pays" you are requesting that the employee be allowed to take t</p> <p><input type="button" value="Cancel"/> <input type="button" value="Submit"/></p> <p>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.</p>
6	<p>To deny the request, click the red x to the right of the course request you want to deny.</p> <div data-bbox="451 1150 805 1472"><p>(3 Results)</p><p>Options</p><p><input checked="" type="checkbox"/> <input type="checkbox"/></p></div>



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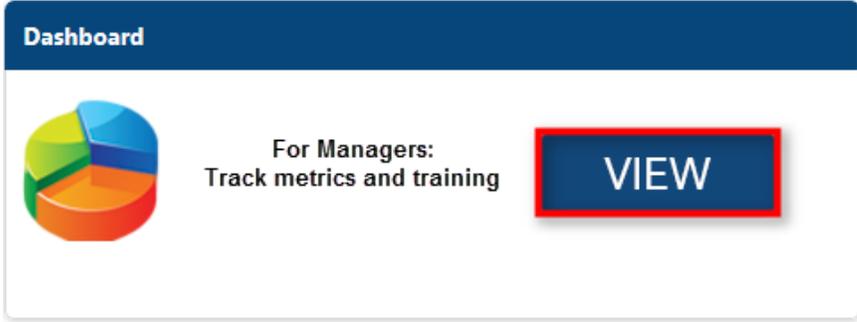
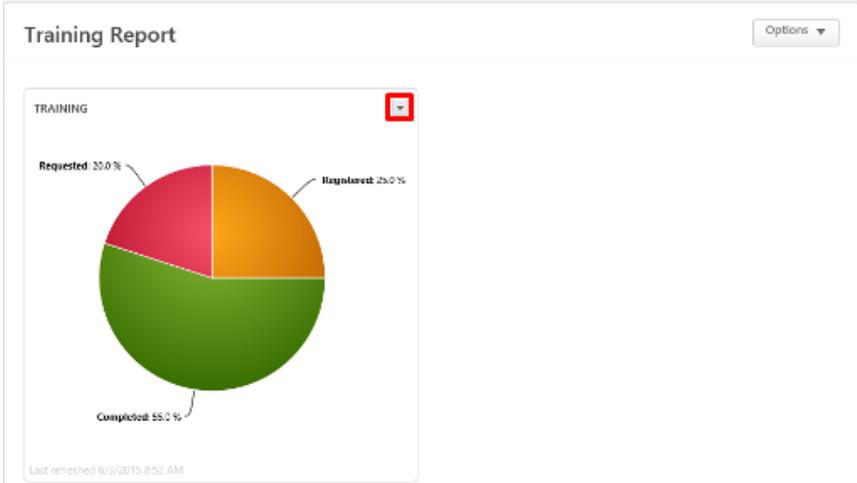
Step	Action
7	<p>You can enter a comment in the field. For example, you can suggest another quarter or month, another class, or another session. You can also leave this field blank. Then click the Submit button.</p> <p>Deny Request</p> <p>Please enter any additional comments:</p> <div data-bbox="464 575 1265 772" style="border: 1px solid red; padding: 5px;">Please re-request this course in Q4.</div> <p><input data-bbox="467 848 583 884" type="button" value="Cancel"/> <input data-bbox="602 848 732 884" type="button" value="Submit"/></p> <p>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.</p>



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Viewing Dashboards

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

Step	Action
1	<p>Scroll down on the Welcome Page and click the View button in the Dashboard widget.</p>  <p>Result: The Employee Training Progress Pie Chart will display.</p>
2	<p>Click the drop-down arrow to the right of the title.</p> 



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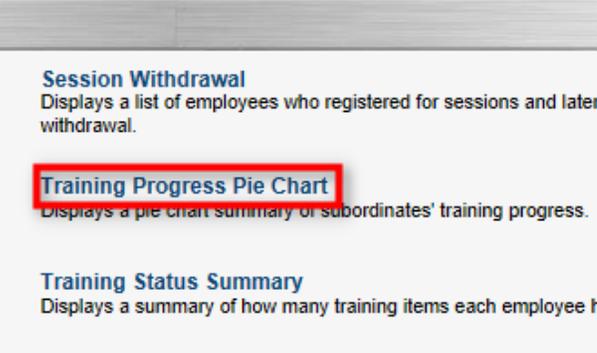
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3	<p>Click the View Details link.</p> <div data-bbox="454 378 974 966"> <h3>Training Report</h3> <p>Requested: 20.0 % Registered: 25.0 % Completed: 55.0 %</p> <p>Last refreshed 6/3/2015 8:52 AM</p> </div> <p>Result: You will see additional details regarding the training progress for your direct reports.</p> <div data-bbox="454 1092 1218 1827"> <h3>Employee Training Progress Summary</h3> <table border="1"> <thead> <tr> <th>USER ID</th> <th>USER</th> <th>TYPE</th> <th>TITLE</th> <th>TRAINING PROVIDER</th> <th>STATUS</th> </tr> </thead> <tbody> <tr> <td>127025</td> <td>Wozny, Cassie</td> <td>Online Class</td> <td>Storyline Trial SCORM 1.2</td> <td>County of Milwaukee, WI</td> <td>Pending Acknowledgment</td> </tr> <tr> <td>129835</td> <td>Wozny, Cassie</td> <td>Event</td> <td>Couragous Dialogue</td> <td>Milwaukee County Leadership Excellence</td> <td>Approved</td> </tr> <tr> <td>127025</td> <td>Wozny, Cassie</td> <td>Online Class</td> <td>Accident Investigation with Storyline</td> <td>County of Milwaukee, WI</td> <td>Registered</td> </tr> <tr> <td>127025</td> <td>Wozny, Cassie</td> <td>Online Class</td> <td>Hybrid Vehicle Safety - 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Viewing Reports

To view additional training reports, complete the following steps:

Step	Action
1	<p>On the Main Menu, click Reports and then Standard Reports below it.</p>  <p>Result: The Reports page will display. In this example we are going to use the Training Progress Pie Chart report.</p>
2	<p>Click the title of the report you want to run.</p> 

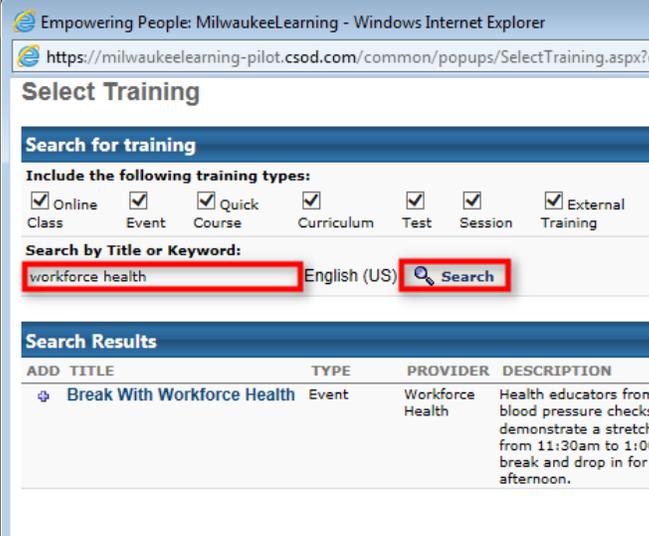
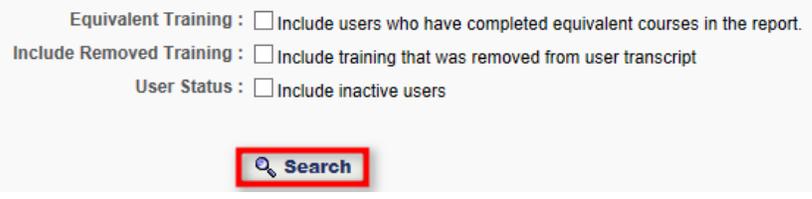


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Step	Action
3	<p>Depending on the report, you may have to configure several fields.</p> <div data-bbox="456 380 1268 911"><p>Report Criteria</p><p>View training progress information for your subordinates. The date filters below refer to the date the training was requested/assigned. For an overview of all statuses, click on the "View All Statuses" link that appears in the detailed breakdown view</p><p>DATE CRITERIA</p><p>Date Criteria: <input type="text" value="Select"/> From: <input type="text" value="6/1/2015"/> To: <input type="text" value="6/22/2015"/></p><p>ADVANCED CRITERIA</p><p>Training Type : <input checked="" type="checkbox"/> Online Class <input checked="" type="checkbox"/> Event <input checked="" type="checkbox"/> Quick Course <input checked="" type="checkbox"/> Curriculum <input checked="" type="checkbox"/> Test <input checked="" type="checkbox"/> Session <input checked="" type="checkbox"/> External Tr</p><p>Training Title : <input type="text"/></p><p>Options : <input checked="" type="checkbox"/> Hide Archived Training <input type="checkbox"/> Include Indirect Subordinates</p><p>Display : <input checked="" type="radio"/> All Training <input type="radio"/> Assigned Training</p><p>Equivalent Training : <input type="checkbox"/> Include users who have completed equivalent courses in the report.</p><p>Include Removed Training : <input type="checkbox"/> Include training that was removed from user transcript</p><p>User Status : <input type="checkbox"/> Include inactive users</p><p><input type="button" value="Search"/></p></div>
4	<p>If you see a button that looks like a small square pointing toward a larger square, click it to have a search window open.</p> <div data-bbox="456 1037 1308 1199"><p>Training Type : <input checked="" type="checkbox"/> Online Class <input checked="" type="checkbox"/> Event <input checked="" type="checkbox"/> Quick Course <input checked="" type="checkbox"/> Curriculum <input checked="" type="checkbox"/> Test</p><p>Training Title : <input type="text"/></p><p>Options : <input checked="" type="checkbox"/> Hide Archived Training <input type="checkbox"/> Include Indirect Subordinates</p></div> <p>Note: You cannot type directly into this field before clicking the button. You must click the button to open the search window.</p>



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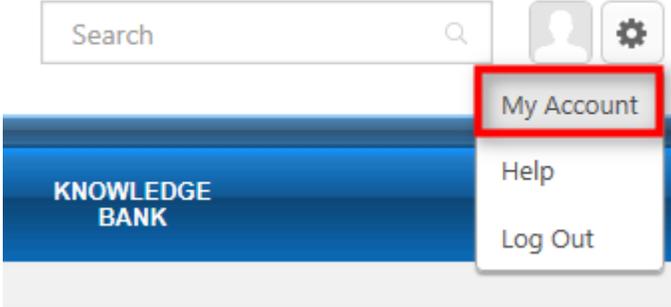
Step	Action
5	<p>Type the name of the training in the Search by Title or Keyword field and then click the Search button, or click the Search button to see all training options.</p>  <p>The screenshot shows a web browser window titled 'Empowering People: MilwaukeeLearning - Windows Internet Explorer'. The URL is 'https://milwaukeelearning-pilot.csod.com/common/popups/SelectTraining.aspx?'. The page is titled 'Select Training' and has a section 'Search for training'. Under 'Include the following training types:', there are checkboxes for Online Class, Event, Quick Course, Curriculum, Test, Session, and External Training, all of which are checked. The 'Search by Title or Keyword:' field contains 'workforce health' and the language is set to 'English (US)'. A 'Search' button is highlighted with a red box. Below this is a 'Search Results' table with columns 'ADD', 'TITLE', 'TYPE', 'PROVIDER', and 'DESCRIPTION'. The first row shows a blue plus sign in the 'ADD' column, the title 'Break With Workforce Health', the type 'Event', the provider 'Workforce Health', and a description about health educators and a stretch break.</p>
6	<p>Click the blue plus sign to the left of the title.</p>  <p>The screenshot shows a close-up of the 'Search Results' table. The columns are 'ADD', 'TITLE', 'TYPE', and 'PROVIDER'. The first row has a blue plus sign in the 'ADD' column, the title 'Break With Workforce Health', the type 'Event', and the provider 'Workforce Health'. The plus sign is highlighted with a red box.</p>
7	<p>Click the Search button.</p>  <p>The screenshot shows a section with three filter options: 'Equivalent Training : <input type="checkbox"/> Include users who have completed equivalent courses in the report.', 'Include Removed Training : <input type="checkbox"/> Include training that was removed from user transcript', and 'User Status : <input type="checkbox"/> Include inactive users'. Below these is a 'Search' button highlighted with a red box.</p>
8	<p>Finish filling in any fields, and then click the Search button.</p> <p>Result: The report will display.</p>



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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. 



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Step	Action
3	<p>Check the Out of office checkbox.</p> <div data-bbox="506 394 732 621"></div> <p data-bbox="786 443 1013 510">Traci Gondek Client Admin Division</p> <div data-bbox="526 686 927 758"><p>Settings Payment Methods</p></div> <p data-bbox="537 800 1179 873"><input type="checkbox"/> Out of office (Change your status to Out of Office if you'll be away on an extended leave)</p> <p data-bbox="537 915 732 947">Select Signature</p> <div data-bbox="542 957 821 1024"><p>Traci Gondek ▼</p></div> <p data-bbox="451 1129 1349 1186">Note: When you next log in to the LMS, you will be prompted to uncheck the checkbox and will start receiving training requests again.</p>