EZ LCMS V5 User Guide

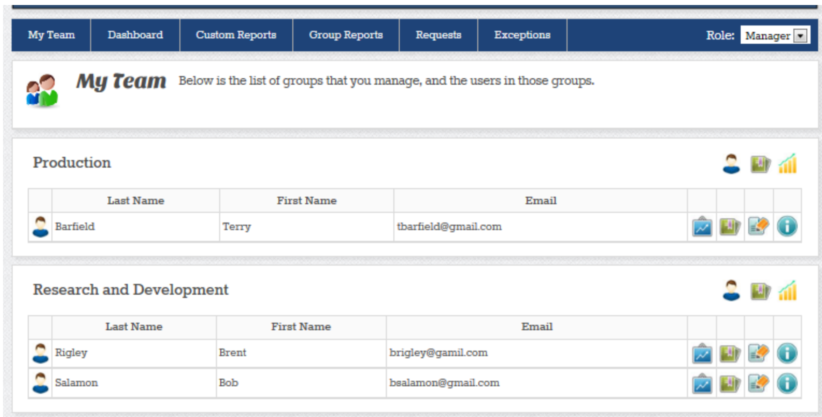
Manager Role

Table of Contents

MANAGER ROLE

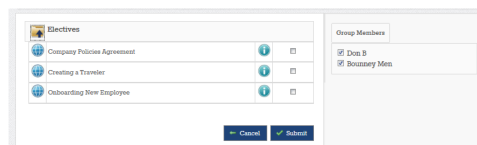
My Team

This page displays all of the users by group that a Manager is responsible for. There can be more than one manager per group and this will be setup by the administrator on the Groups page. This page allows the manager to manager the entire group at one time or each member individually. The functions that are possible form this page are listed below.

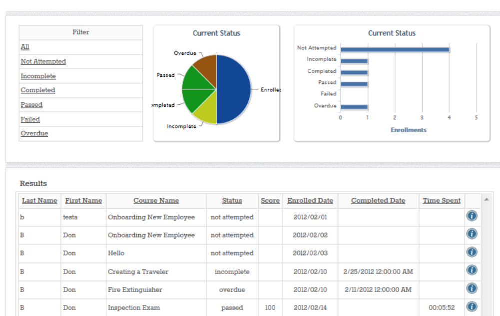


This icon will allow the Manager to add users to their group.

The enrollment icon will allow the Manager to enroll the entire group in courses that they have been given access to via the Limited Catalog option for the group. This is setup by the administrator.



This icon will display a detailed report of the groups activities.

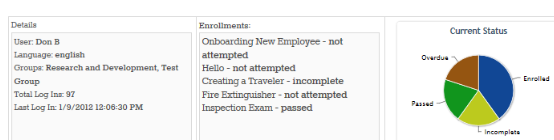


The transcript icon will allow the Manager to view the users entire transcript just as the user sees it. The Manager does not have any editing capabilities of the transcript. Any transcript editing must be done by the administrator.

This enrollment icon allows the Manager to focus on one user at a time. It allows the manager the same access to courses as the group enrollment icon.

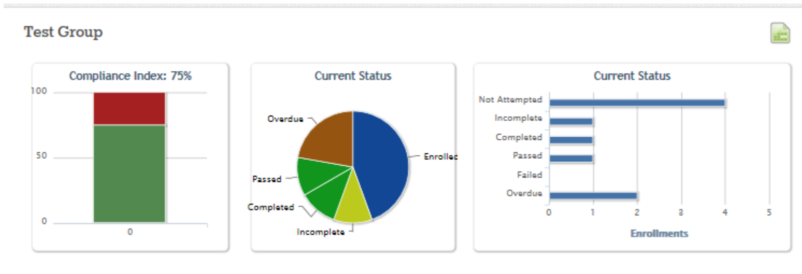
The user profile edit button will allow the Manager to modify the users profile.

This button will give the Manager a quick summary of the user.



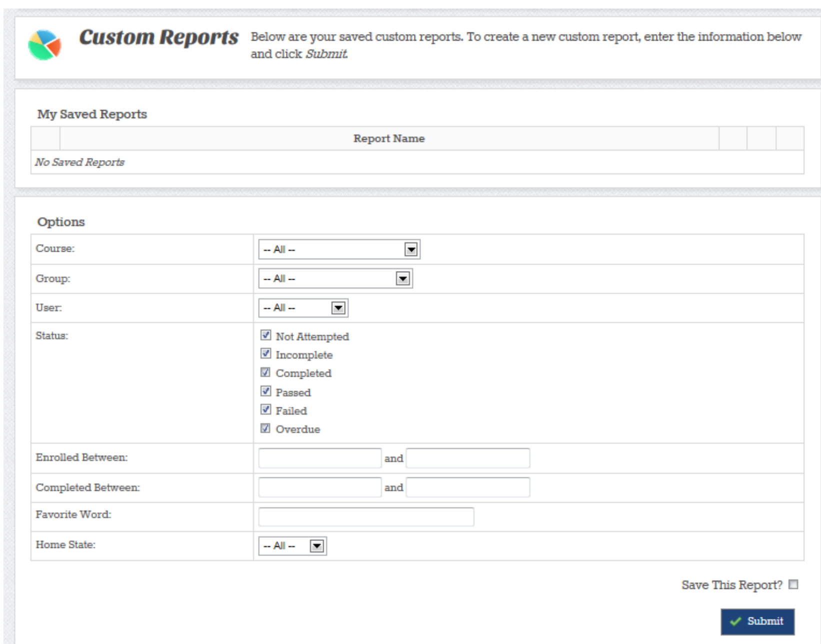
Dashboard

The Managers Dashboard provides a quick glimpse of the users compliance index and current enrollment statuses for each group managed. If the Manager would like to reformat the data for any group it can easily be exported by clicking the icon.

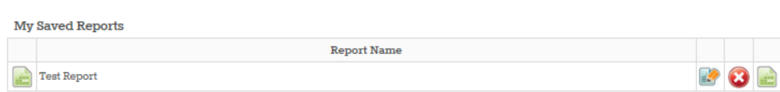


Custom Reports

The custom reports page allows the Manager to report on all of their direct reports as a whole, as a group or individually. This reporting function also allows the Manager to set specific course status filters, date ranges and specific custom user criteria setup by the administrator. Any custom report can be saved by the Manager so that it can be run at a later date. This is a great option for running monthly reports like Enrollments per Month. To do this, select your custom report details and select the Save



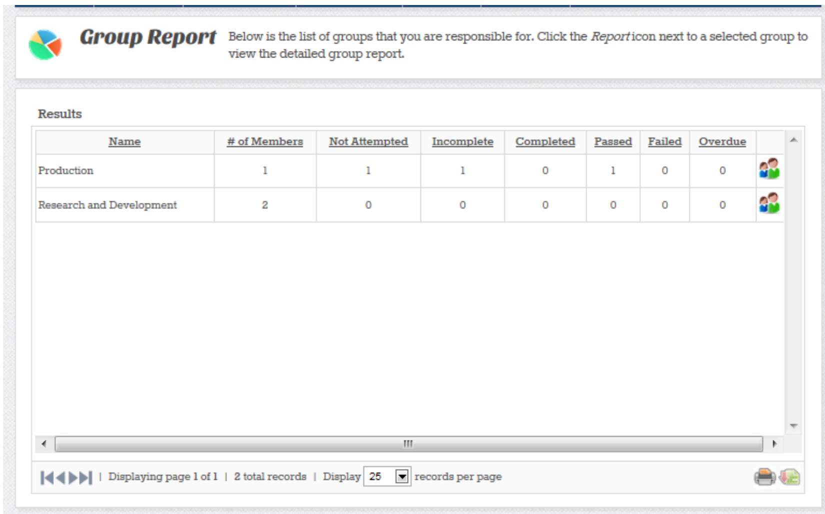
"This Report?" and click Submit. The report will run and the option to Print the report or Export it to Excel will be available at the bottom of the page on the right. When you return back to the Custom Reports page you will now see that your report has been saved.



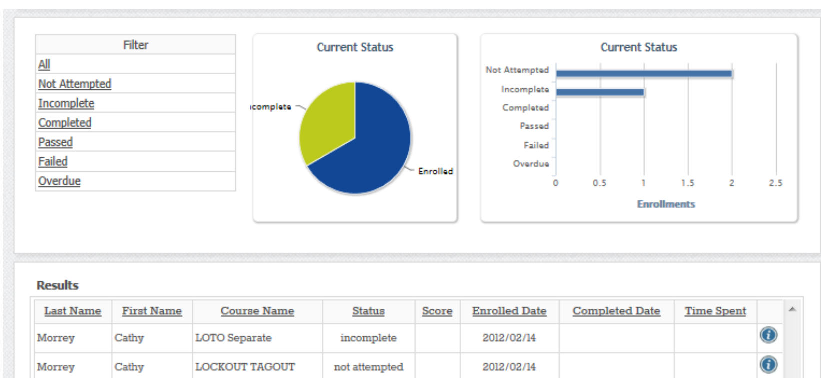
Here you can edit delete or run the report. When you edit the report, you will be able to change reporting filters (like a date range) and click Submit to run it.

Group Reports

The group reports page gives the Manager an overview of their groups and activity. This report can be printed or exported as needed. The report also allows the manager to drill down into a group by clicking. 

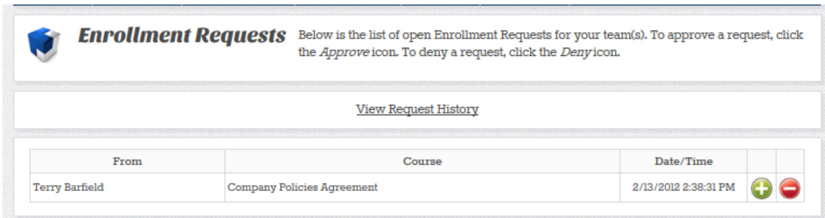


Which will provide a more detailed list and additional filters to manipulate the data.



Requests

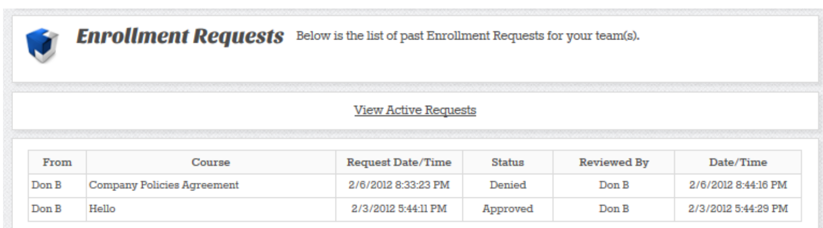
The enrollment Request page lists requests that were initiated by users that you manage. This page will detail who the user is, what course they would like to take and the date and time of the request. The Manager can either Accept the request or deny it. If the Manager Accepts the request the user is enrolled in the course and the standard enrollment process takes over. If the Manager Denies the request then the user is notified by e-mail that their request to take the course has been denied.



 Accept: This button will accept the request and immediately enroll the user in the course. If the course has been setup with an enrollment e-mail then the user will receive the e-mail.

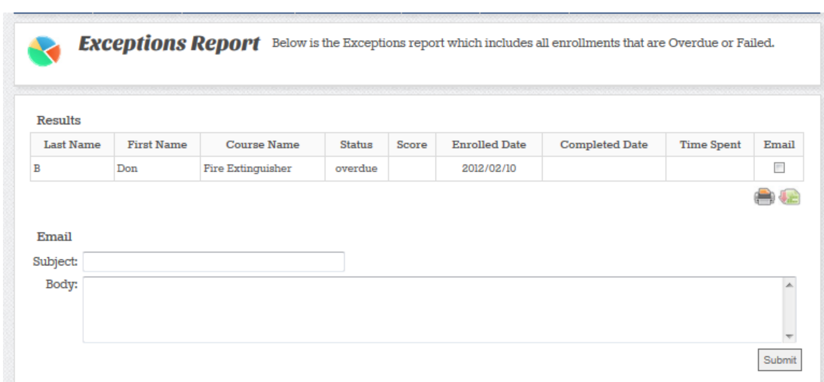
 Deny: This button will not allow the enrollment to proceed and send an e-mail to the user indicating that the enrollment request was denied.

The system keeps a request history for each manager.



Exceptions

The Exceptions report will list all employees who have courses that have not been completed in the allotted time or that have failed courses. This report will allow the Manager to select users that they would like to send an e-mail, create and send the e-mail all at one time.



 Print: This icon will print the report. Be pure to use your printer properties settings to orient and fit the report to the page.

 Export to Excel: This button will download the data into an excel sheet.