



UC LEARNING CENTER **Manager Guide**



UC SANTA CRUZ

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Introduction

The **UC Learning Center** (UCLC) 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
- View direct reports' current training schedule
- Register direct reports for activities

UCLC Overview

Browser Capability

The UC Learning Center can be accessed from any modern browser.



To ensure that courses load properly, **the browser's popup blocker should be disabled.**

Note:

SumTotal applications do not support Internet Explorer or Edge in Compatibility Mode.

If you have any problems with browser compatibility, please email LearningCenter@ucsc.edu.



Obtaining a Logon ID

Faculty, staff, and student employees are automatically assigned a UC Learning Center account. This process may take up to a week from the new hire's start date.

If you have current or pending employment with UCSC, you are not permitted to request a Student/Affiliate account. To test if your account is already active, click the Login button on the [UC Learning Center](#) website.

If you have no current or pending employment with UCSC, you may request a Student/Affiliate account by filling out this [request form](#).

If you need help filling out the request form, you may view these [illustrated instructions](#).

Logging into the UC Learning Center

To access the UC Learning Center for the Santa Cruz campus, use this URL in your web browser client... <http://learningcenter.ucsc.edu/>

Help Contact

For assistance with the UC Learning Center, email LearningCenter@ucsc.edu

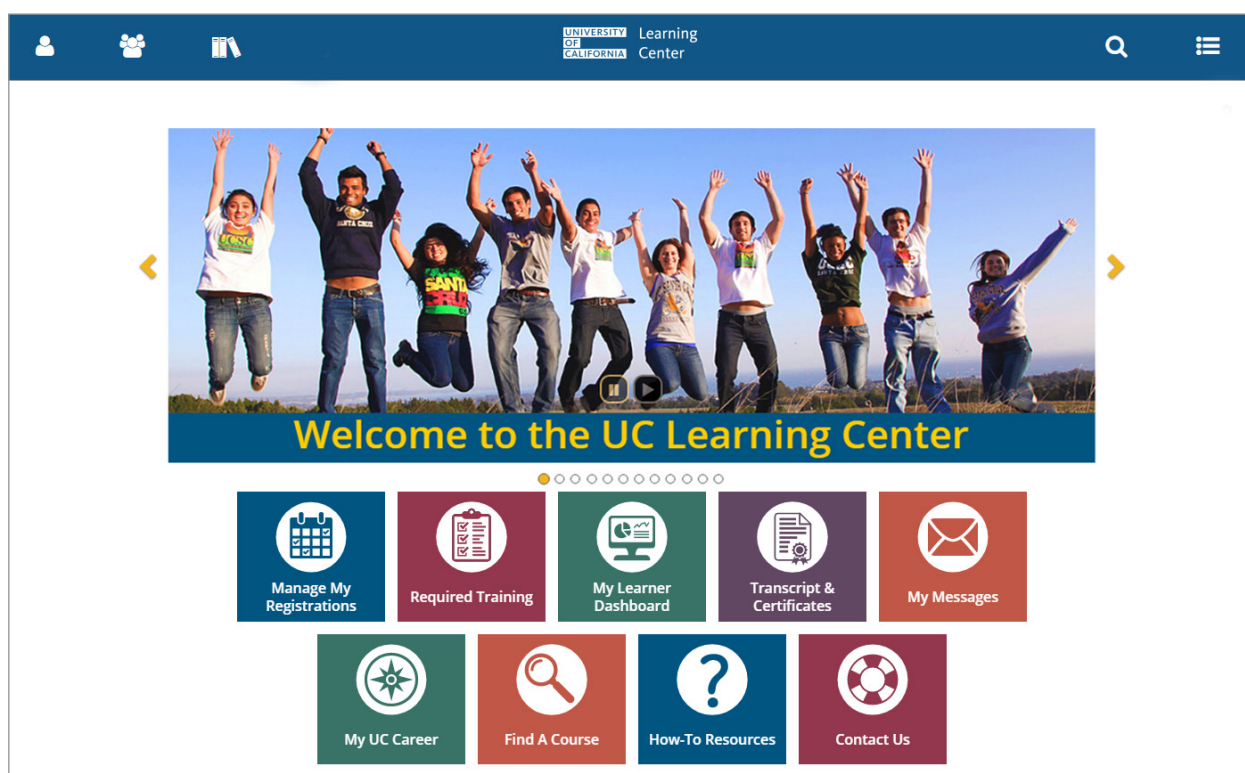


Navigation

When you first login to the UC Learning Center, you will see the home page. 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.

Home Page - UCSC Landing Page



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.

Required Trainings: View required and recommended training.

My Learner Dashboard: The Learner Dashboard provides a quick overview of various relevant information regarding the Learner's activities. On the dashboard can be seen Recently Launched activities, a calendar highlighting any upcoming scheduled classes, messages from the system to you, Completed Certifications and the My Learning widget providing quick links to training activities. (see *My Dashboard image below*)



Transcript & Certificates: View transcripts for any courses you have completed in the UC Learning Center.

My Messages: View user's messages

Find a Course: Search for a course.

How-To Resources: Links to a web page that has helpful information regarding the UC Learning Center including online resources for short video tutorials, user guide, help with your Blue and Gold passwords and for contacting UCLC support.

Support: Send email to learningcenter@ucsc.edu.

My Dashboard (Learner)

The dashboard is divided into several sections:

- RECENTLY LAUNCHED:** Features a card for "UC Sexual Violence and Sexual Harassment Prevention Training for Staff" with a "START" button.
- CALENDAR:** A calendar for July 2017 with the 14th highlighted.
- MY MESSAGES:** A table of messages with columns for Subject, Date Received, and Actions.
- COMPLETED CERTIFICATIONS:** A list of completed certifications with details and "VIEW DETAILS" buttons.
- MY LEARNING:** A summary section showing 4 Training Activities, broken down by status: 0 Critical, 3 Assigned, 2 Current, 0 Upcoming, and 2 Required Certifications.

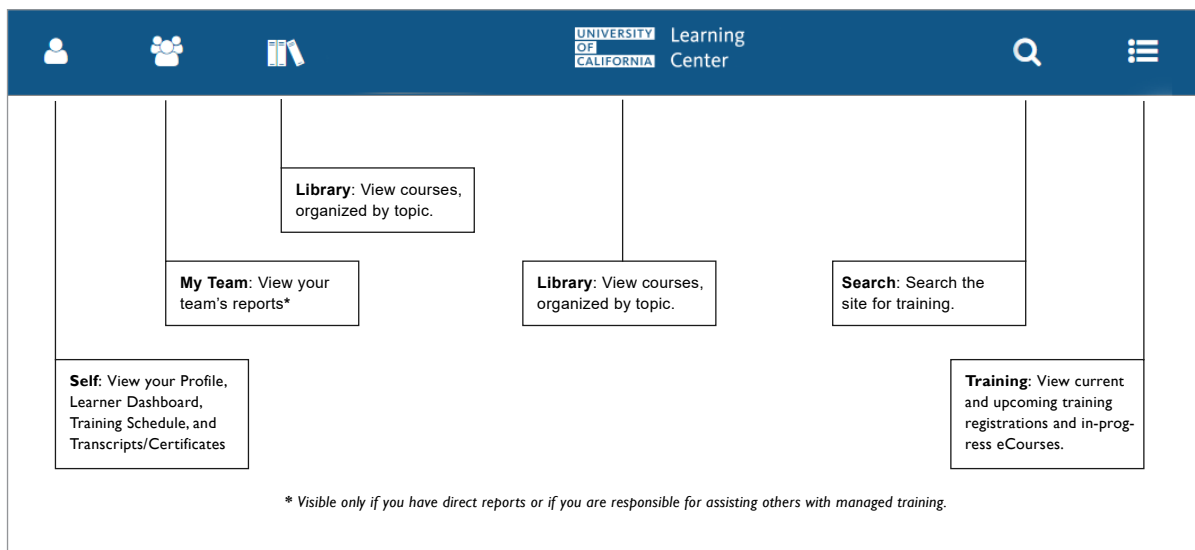
Subject	Date Received	Actions
Hazardous Waste Training Requirement Notification	Jul 11, 2017	VIEW DETAILS
Ken Shaw completed UC Laboratory Safety Fundamentals	Jul 11, 2017	VIEW DETAILS
UC Sexual Violence and Sexual Harassment Prevention Training for Staff has been assigned to Ken Shaw	Jul 7, 2017	VIEW DETAILS

Certification	Comp. Date	Exp. Date	Actions
Active Shooter / Safety in the Workplace	5/18/2017		VIEW DETAILS
Laboratory Safety for Research Personnel	11/10/2016	11/11/2019	VIEW DETAILS
UC Laboratory Safety Fundamentals	11/10/2016	11/11/2019	VIEW DETAILS



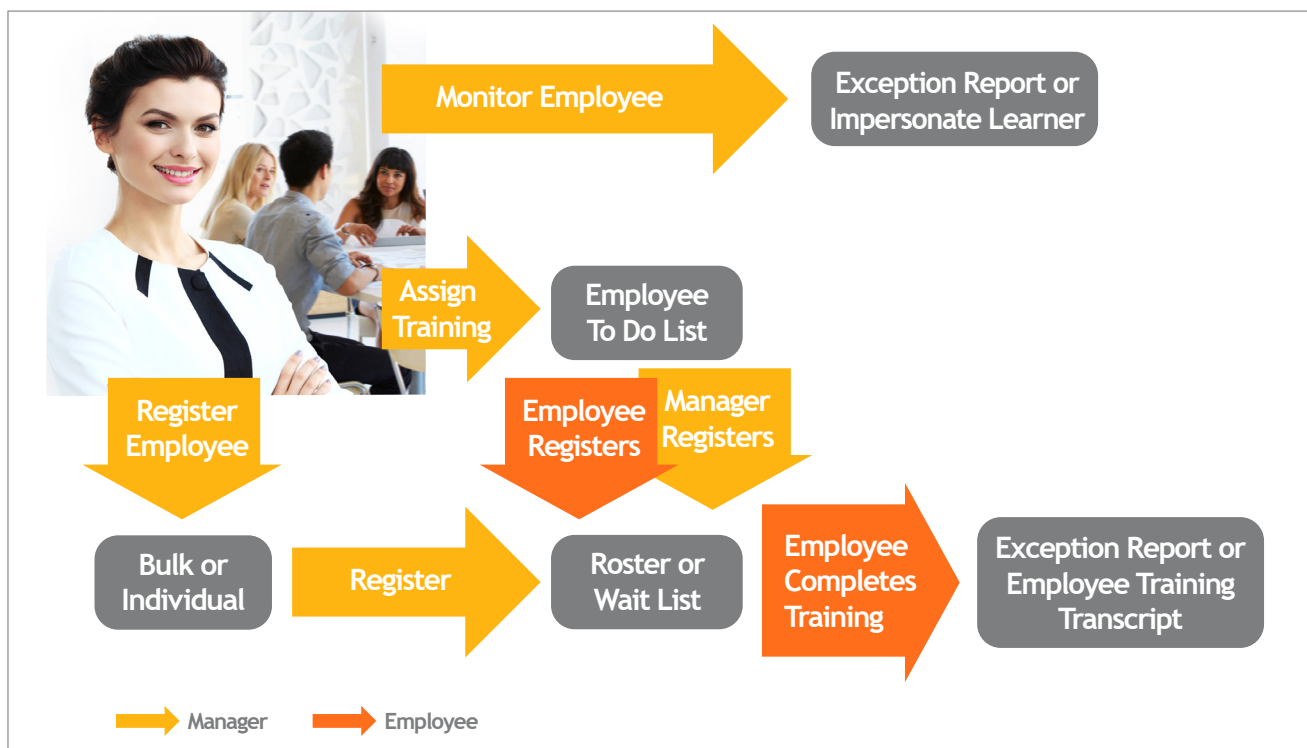
Top Menu

The Top Menu will appear on every page. Hover over each icon to see where they will take you.





Manager Overview



The basic workflows of a manager in the UC Learning Center (UCLC) revolve around you monitoring your employee's progress or actively assigning or registering your direct reports for the training they need. This results in the ultimate purpose of any Learn system: **learning**.

The manager may assign training to their employees and allow them to choose when to complete it, or register their employees by placing them directly on the roster for a specific training. As a manager your ultimate focus is making sure your employees complete their assigned training.

Learning activities are any training opportunity available to you in the UCLC. These can be any digital document or e-learning module that you can download and complete at your leisure, it could be a webinar scheduled by a trainer, it could be an instructor-led course that will be held at the corporate training facility, an on-the-job training class run by your manager on how to use a specific equipment, or a training class run by a vendor specializing in business skills developments.

You will be able to monitor your employee's completion of these learning activities. The learning activities your employees complete will increase their skills and make them better at their jobs.

Learning activities plus your employees equal **learning and skill improvement**.



Definitions for Managed Employees

As a **Manager**, there are 2 employee groups that you can manage within the UCLC. These 2 groups are **Direct Reports** and **All Viewable Users**. It is important to understand the difference between these 2 groups and how to view them as you manage employee activities. On various UCLC pages, you will be able to select between these 2 groups via a pull-down menu.

Direct Reports

Direct Reports are those who the manager directly supervises. Each user, no matter what role they have in the UCLC, can have a manager assigned to their account profile either automatically by the system or manually by a system administrator (users and managers can not change this information).

All Viewable Users

This group represents all users within the UCLC that a manager has permission to see. The organizations that a manager can view are assigned by a UCLC system administrator.

Please contact LearningCenter@ucsc.edu if you have any questions.

Assigned Training vs Registering Others

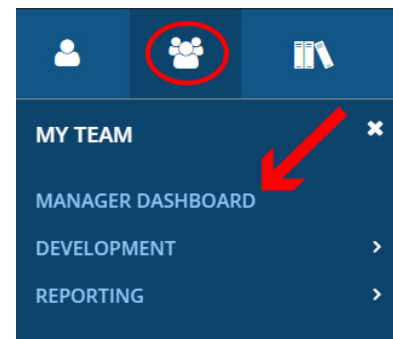
As a manager, you can either **register** or **assign** training for your direct reports or viewable users in the UCLC. While seemingly similar in function, only **assigned** training will show up in the **Exception Reports** area on the Manager Dashboard.

Registering employees for activities allows a manager to easily add an employee or batch register a group of employees, but this **does not** assign them the training as being required or recommended.



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:

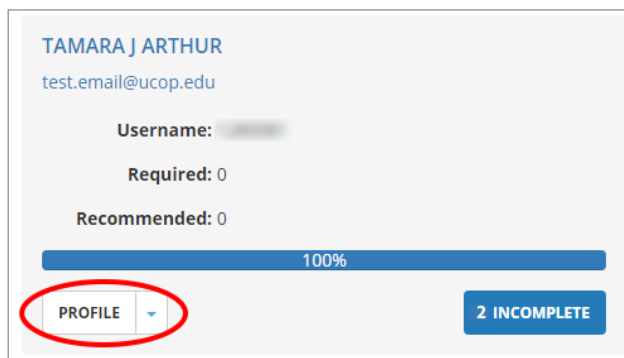
Manager Dashboard is updated nightly, so if one of your users completed training after the last update, it will not appear in this view until the next update. However, the user's training transcript and schedule are displayed in real time and will show you their latest status.



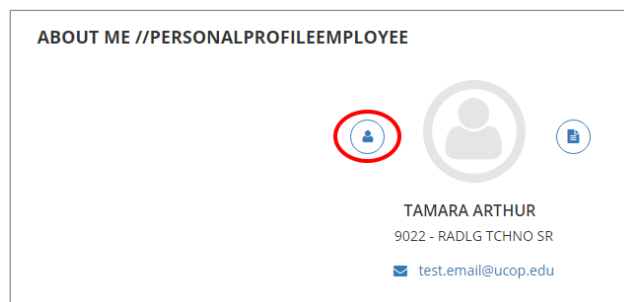
View Employee Profile

To access an employee's profile...

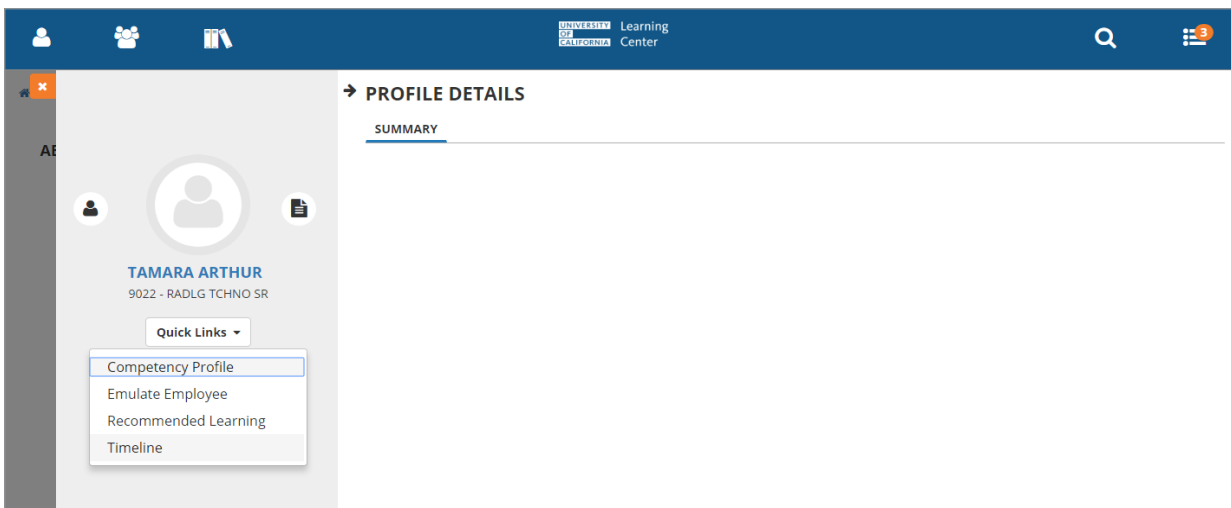
1. Click on the **Profile** Button



2. Then click on the **Self** employee icon



3. The employee's Profile Details pullout appears



4. From the Quick Links drop down menu, select Timeline, Recommended Learning or Emulate Employee (see below).

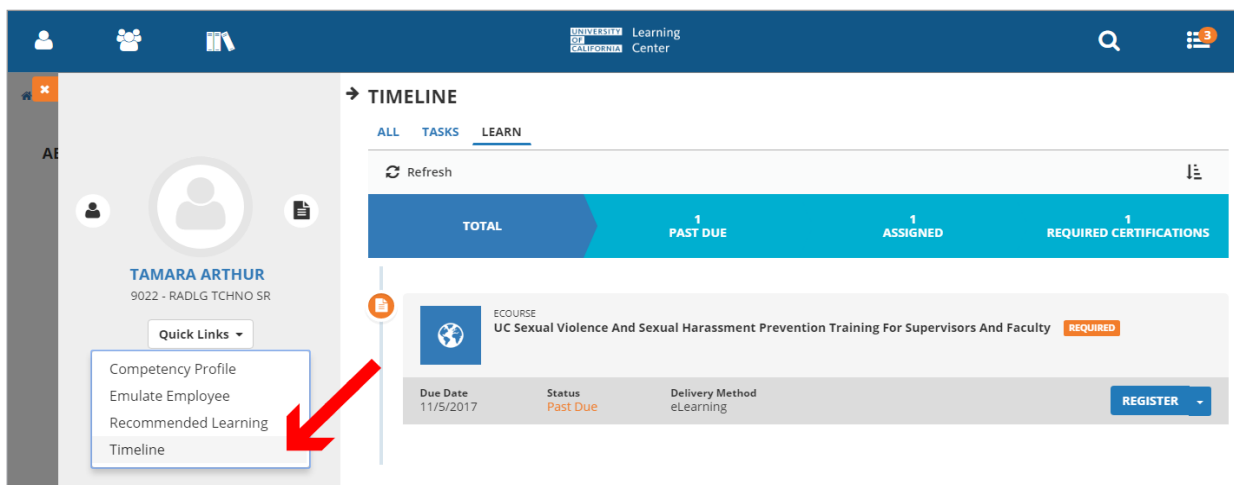
NOTE:

Competency Profile not currently implemented on UCSC campus.



View Employee Timeline

To view an employee's timeline, select **Timeline** from the **Quick Links** pulldown menu.



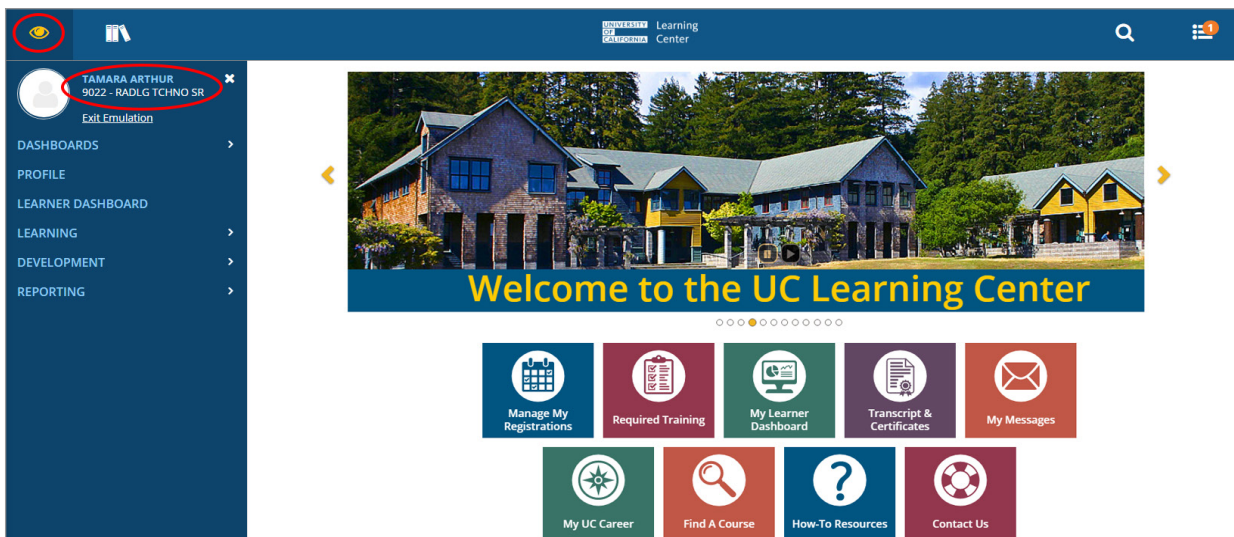
Emulate Employee

To emulate an employee select **Emulate Employee** from the **Quick Links** pulldown menu. The UCLC system begins processing the request and then launches the employee's Landing Page.

When in Emulation mode, note the yellow eye in the upper left corner. Click on the yellow eye icon to launch the left popout navigation area. Note the employee's name and job title.

While in the emulation mode the manager can view the employee's timeline, learning dashboard, schedule, etc.

NOTE: The one activity task a manager **can not** do while in Employee Emulation mode is to register the employee for an activity. If attempting this process, the manager will be registered, not the employee. See [Register Employees for Training](#) elsewhere in this manager guide.

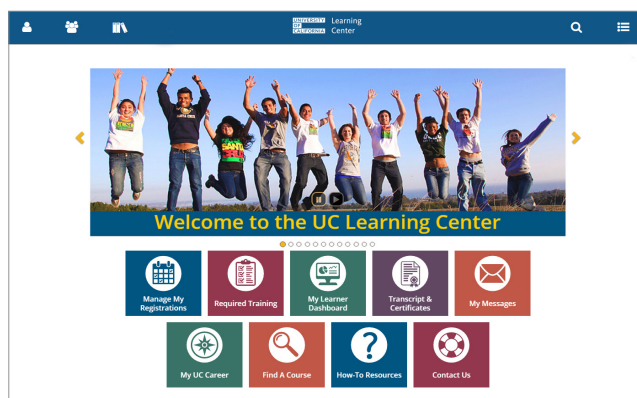




Exit Emulation

To exit the Employee Emulation mode, click on the text link **Exit Emulation** just below the employee's name.

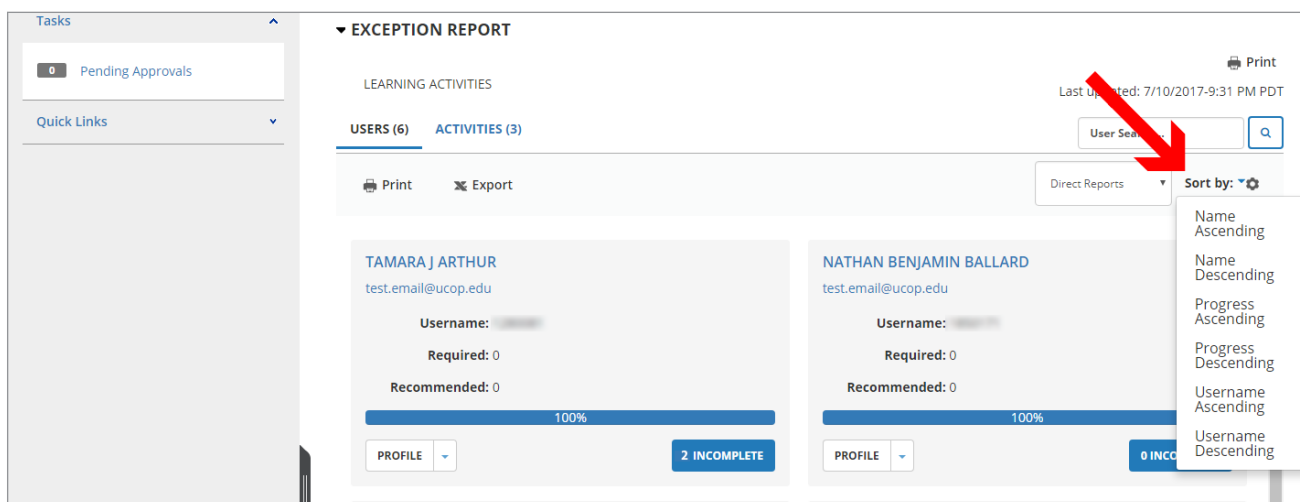
The manager will be returned to their own landing page.



View Managed Employees Activities

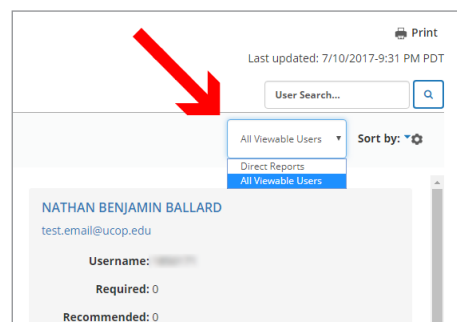
In the Manager Role, you have the ability to view information about your managed users and the progress of their assigned activities.

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).



Choose Direct Reports or All Viewable Users

You will automatically see direct reports that report to you. You can also view all users whose training you are responsible for managing. If you manage more users than just direct reports, you can change your view from **Direct Reports** to **All Viewable Users** using the pull-down menu to select **All Viewable Users**





View Status of Assigned Training

When you first enter your **Manager Dashboard** you will see an overview of your direct reports and the status of their assigned training. The **Exception Report** will show you the state of compliance of which your direct reports are currently at for all training assigned to them.

The screenshot shows the Manager Dashboard interface. At the top, there are tabs for 'USERS (6)' and 'ACTIVITIES (3)'. Below the tabs, there is a 'User Search...' bar and a 'Direct Reports' dropdown menu. The main area displays four user cards. Each card shows the user's name, email, username, required training (0), and recommended training (0). A progress bar indicates the completion status. Below the progress bar, there is a 'PROFILE' dropdown and a button indicating the number of incomplete items. For Tamara J Arthur, the button says '2 INCOMPLETE' and is circled in red. For Nathan Benjamin Ballard, it says '0 INCOMPLETE'. For Isabella Nancy Bond, it says 'NO ACTIVITIES ASSIGNED'. For Natasha Lachica Encinas, it says '0 INCOMPLETE'.

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.

Individual Reports

To view a detailed report for an individual user:

5. Locate the user you wish to find out more information about.
6. Click on the blue **Incomplete** button (see above image).

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.

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.

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

-
- TAMARA J ARTHUR**
test.email@ucop.edu
- Username:** [REDACTED]
- Required:** 0
- Recommendation:** [REDACTED]
- PROFILE** [Dropdown Arrow]
- Learner Approvals
 - Self-Reported Training
 - Training Analysis**
 - Training Schedule
 - Training Transcript
- 0 INCOMPLETE**
- NATHAN BENJ**
test.email@ucop.edu
- Username:** [REDACTED]
- Required:** [REDACTED]

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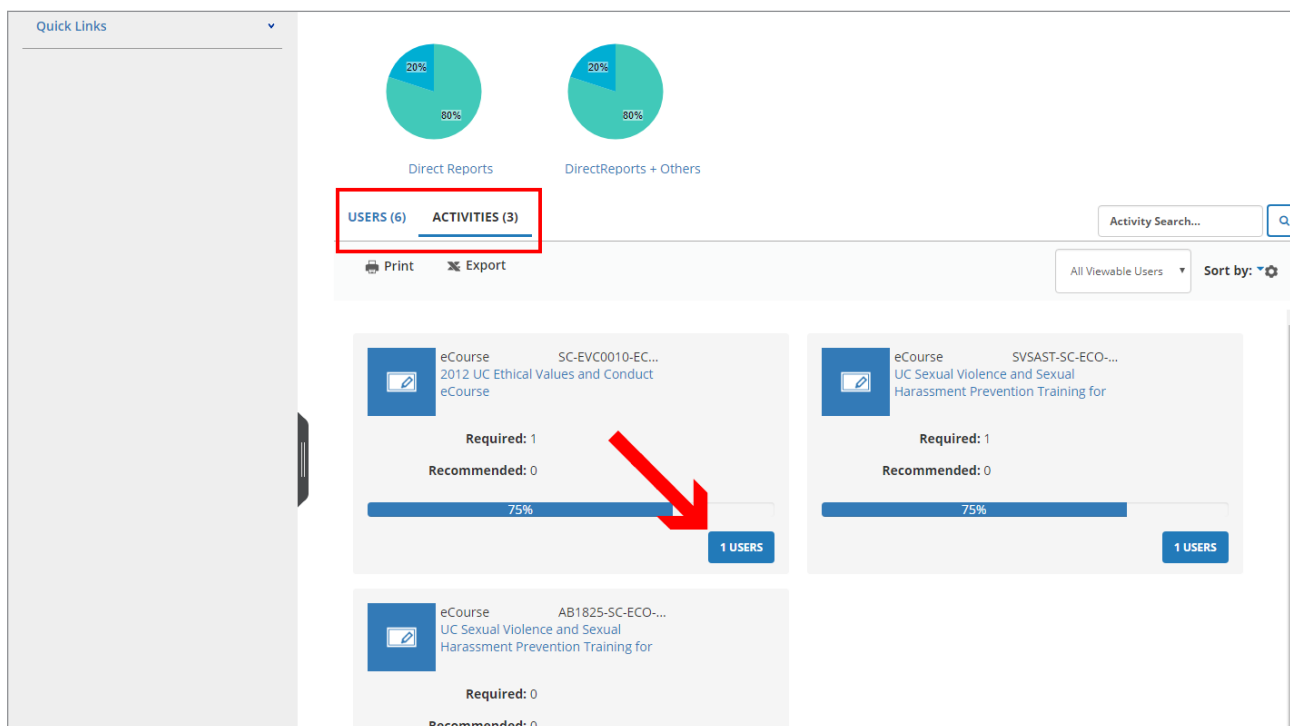


Assigned Training by Activity

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

Switch from the **Users** view to the **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.

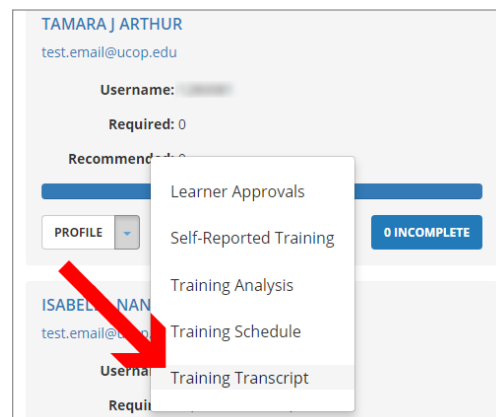
Click on the blue **Users** button to see who is still required to complete the training.



Training Transcript (User Emulation mode)

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.

TRAINING TRANSCRIPT

Select a year or date range to filter completed training records.

Date Range ▼

Start Date: 7/13/2016 08:18pm End Date: 7/13/2017 08:18pm [REFRESH](#)

TAMARA J ARTHUR

List of completed activities from 7/13/2016 to 7/13/2017

Username: [redacted] NT account: [redacted]

E-mail: test.email@ucop.edu User number: [redacted]

ACTIVITIES

Activity	Estimated Credit Hours	Start Date	Completion Date ▼	Expiration Date	Score	Grade	Attended Duration	Signature Status
eCourse: UC Sexual Violence and Sexual Harassment Prevention Training for Staff		4/17/2017	4/17/2017	4/17/2019	100	100		
eCourse: UC Cyber Security Awareness		2/9/2017	2/9/2017		100	100		

You can view the transcript or individual diplomas and then export to PDF or print them.

Export Training Transcript to PDF:

1. Click **Export to PDF** (see “A” label on image above) in the top right corner.
2. In the pop-up window that appears, click **File** to download the PDF, and then **OK**.
3. The PDF will open in a new window where it can be printed or downloaded.

Print Training Transcript

1. Click **Print** (see “B” label on image above) in the top right corner.
2. Print dialog window appears. Select your normal printer and settings and click **Print**.



Diplomas (User Emulation mode)

Export Diploma to PDF:

1. From the Training Transcript page, click the **diploma logo** next to the desired course name (see “C” label on previous image).



1. Click **Export to PDF** (see “D” label on image above) in the top right corner.
2. In the pop-up window that appears, click **File** to download the PDF, and then **OK**.
3. The PDF will open in a new window where it can be printed or downloaded.

Print Diploma

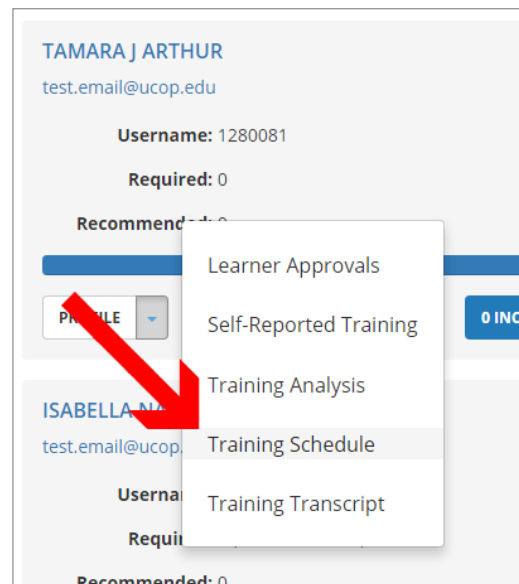
1. Click **Print** (see “E” label on image above) in the top right corner.
2. Print dialog window appears. Select your normal printer and settings and click **Print**.





View Training Schedule (User Emulation mode)

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**.
3. 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.
4. Now you can see that user's registrations and other canceled, in progress or completed training.





UNIVERSITY OF CALIFORNIA Learning Center

Search ...

Q

TRAINING SCHEDULE

This is a list of current training activities for which you are registered.

Search ...

Q

CURRENT/UPCOMING

EXPRESS INTEREST

PENDING SIGNATURES

COMPLETED

CANCELED

WAITING LIST OR PENDING APPROVAL

ALL

ONGOING ACTIVITIES

UPCOMING ACTIVITIES

FIXED DURATION ACTIVITIES

Displaying 2 of 2 Records

10

25

50

100

Export To Excel

Print

Cancel Registration

View Calendar

Activity Name	Status	Code	Region	Start Date	End Date	Actions
<input type="checkbox"/> Scientific Diving Techniques - Refresher Test Certification	REGISTERED	SC-BDT-SDR0129				
<input type="checkbox"/> Scientific Diving Techniques - Refresher of Scientific Diving Techniques - Refresher eCourse	REGISTERED	SC-BDT-SDR0128-ECO				START
<input type="checkbox"/> UC Sexual Violence and Sexual Harassment Prevention Training for Staff eCourse Certification	IN PROGRESS	SVSAST-SC-ECO-2016		7/11/2017		START

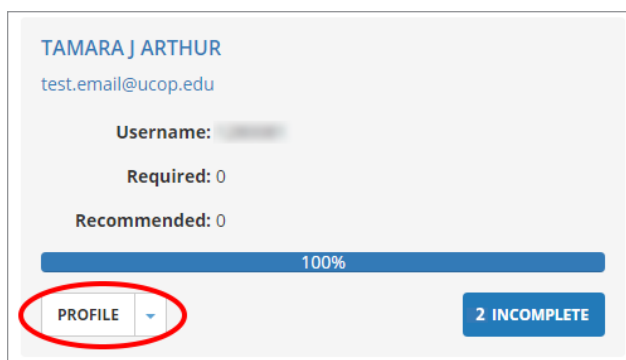


Assign Training to Employees

A manager can assign training activities to their Direct Reports or Viewable Users. Assigning a training activity puts that activity on the employee's To Do List. It does not register the employee for that activity. Either the employee or manager can then register the employee for that activity. Refer to the Manager Overview diagram [here](#).

Adding Training Assignments (single employee)

1. In the Header menu **click** on the My Team icon
2. Navigate to the **Manager Dashboard**



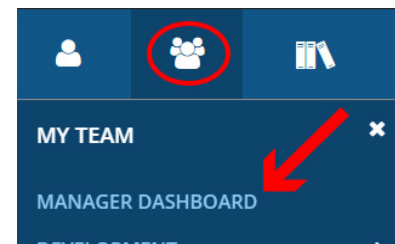
TAMARA J ARTHUR
test.email@ucop.edu

Username: [redacted]
Required: 0
Recommended: 0

100%

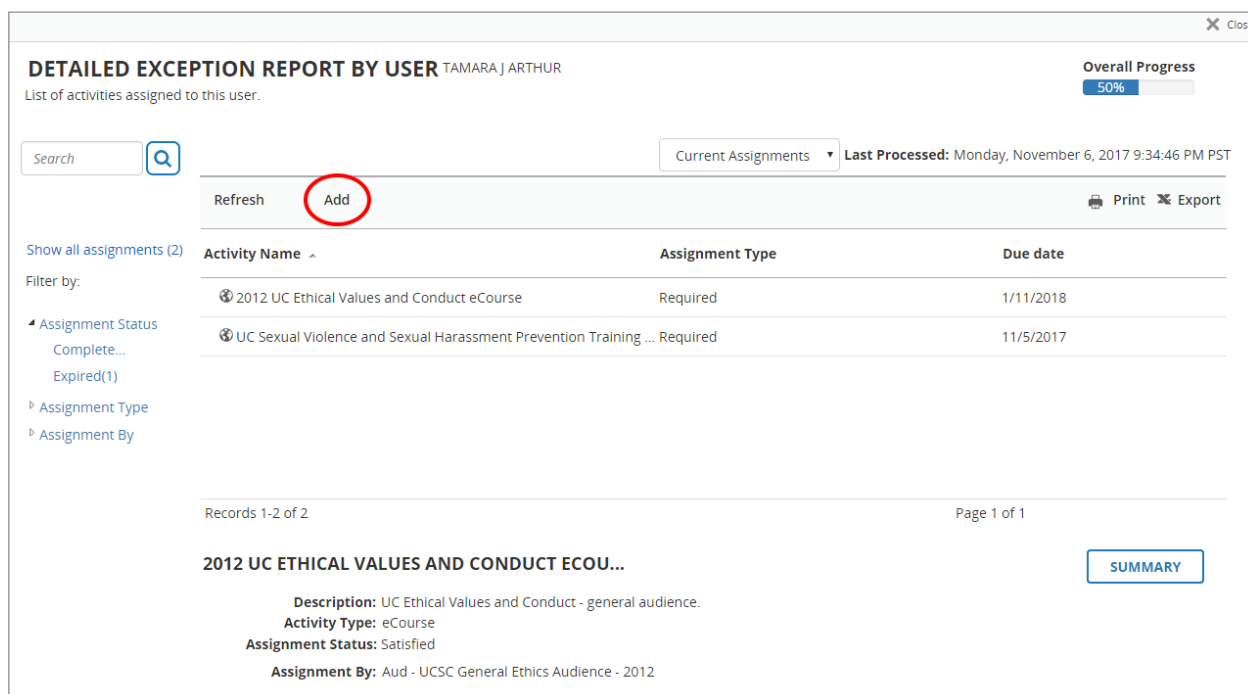
PROFILE [dropdown arrow]

2 INCOMPLETE



3. Under the employee's name in the Exemption Reports section, click the button that reads either **No Activities Assigned** or **X Incomplete**.

4. **Click** the **Add** text link on the employee's Exception Report page



DETAILED EXCEPTION REPORT BY USER TAMARA J ARTHUR

List of activities assigned to this user.

Overall Progress: 50%

Search [icon] Current Assignments [dropdown] Last Processed: Monday, November 6, 2017 9:34:46 PM PST

Refresh [red circle] Add [red circle] Print Export

Activity Name	Assignment Type	Due date
2012 UC Ethical Values and Conduct eCourse	Required	1/11/2018
UC Sexual Violence and Sexual Harassment Prevention Training ...	Required	11/5/2017

Records 1-2 of 2 Page 1 of 1

2012 UC ETHICAL VALUES AND CONDUCT ECOU...

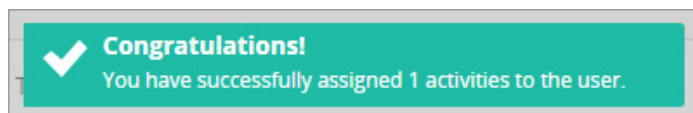
Description: UC Ethical Values and Conduct - general audience.
Activity Type: eCourse
Assignment Status: Satisfied
Assignment By: Aud - UCSC General Ethics Audience - 2012

SUMMARY



5. **Search** for the desired training activity (activities)
6. **Check** the respective checkbox(es).
7. **Click** the **NEXT** button
8. **Select/Input** any specific criteria for the assignment (e.g.: Required or Recommended, Start Date, Due Date, etc.) and then **click** the **APPLY TO SELECTION** button
9. **Click** on the **DONE** button

A confirmation message will appear at the top of the screen.



The manager is then returned to the employee's Exception Report and the new assigned activity is now displayed.

Assignment Options:
Selected Activities (1)

Type:
☐ Required
☒ Recommended
☐ Ignore Previous Completions

Start Date:
☒ Today
☐ Days from today
☐ On

Time zone:
UTC

Priority:
None

Due Date:
☒ No Due Date
☐ Within Days
☐ By

Time zone:
UTC

Assignment Notes:

Status:
Assigned

8
APPLY TO SELECTION

9
CANCEL **BACK** **DONE**

Search	Current Assignments	Last Processed: Monday, November 6, 2017 9:34:46 PM PST	
Refresh	Add	Print Export	
Show all assignments (3)	Activity Name	Assignment Type	Due date
Filter by:	2012 UC Ethical Values and Conduct eCourse	Required	1/11/2018
▸ Assignment Status	FileMaker Pro, Level 1	Recommended	-
▸ Assignment Type	UC Sexual Violence and Sexual Harassment Prevention Training ...	Required	11/5/2017
▸ Assignment By			



Adding Training Assignments (multiple employees)

1. In the Header menu **click** on the Library icon
2. Select desired Library Topic
3. **Enter** search information in the **Activity search** field
4. From the search results, beside the desired activity, go to the **pulldown menu** on the right side and choose **Manage Assignments**

The screenshot shows the University of California Learning Center Library interface. The sidebar on the left lists various library topics. The main area displays search results for 'filemaker*'. The first result is 'FileMaker Pro, Level 1'. A red arrow points to the 'Manage Assignments' option in the pulldown menu next to this activity.

5. In the popup window that appears **click** the **Add** text link

Note: There are currently no employees signed to this activity already

The screenshot shows the 'Manage Assignments' popup window. The title is 'MANAGE USER ASSIGNMENTS FOR FileMaker Pro, Level 1'. Below the title, it says 'List of users assigned to this activity.' There is a search bar and a 'Last Processed' date of 'Thursday, November 9, 2017 12:29:01 PM PST'. The 'Current Assignments' dropdown is set to 'Current Assignments'. The 'Add' button is highlighted with a red circle. Below the 'Add' button, there are 'EDIT' and 'REMOVE' buttons. The bottom section of the window shows a message: 'You either do not have any direct reports or none of your direct reports are currently assigned to this activity.'



6. Select the checkboxes beside the employees you want to assign to the training activity. Check individual checkboxes for select employees or the checkbox beside the Name title to select all employees on that page of results. (you may need to move to other pages to see all of your direct reports or viewable users).

Manage Assignments

SELECT USERS

Select either one or all users to get assignment options.

Search

[Direct Reports](#)
[All Viewable Users](#)

<input checked="" type="checkbox"/> Name	User Name
<input checked="" type="checkbox"/> TAMARA J ARTHUR	1280081
<input checked="" type="checkbox"/> NATHAN BENJAMIN BALLARD	1850171
<input checked="" type="checkbox"/> ISABELLA NANCY BOND	1978352
<input checked="" type="checkbox"/> NATASHA LACHICA ENCINAS	1858854
<input checked="" type="checkbox"/> DETMAR H FINKE	1631268
<input checked="" type="checkbox"/> KEVIN CHAD WALKER	1970218

Records 1-6 of 6 Page 1 of 1

Selected users (6)

7. **Click** the NEXT button
8. **Select/Input** any specific criteria for the assignment (e.g.: Required or Recommended, Start Date, Due Date, etc.)

(see image on next page)



9. Click the **APPLY TO SELECTION** button

Manage Assignments

EDIT ASSIGNMENTS FOR FileMaker Pro, Level 1

Select either one or all users to set assignment options.

Select: [All](#) | [None](#) Sort by: Name

TAMARA J ARTHUR Type:Recommended Status:Assigned Due Date:No Due Date	✕
NATHAN BENJAMIN BALLARD Type:Recommended Status:Assigned Due Date:No Due Date	✕
ISABELLA NANCY BOND Type:Recommended Status:Assigned Due Date:No Due Date	✕
NATASHA LACHICA ENCINAS Type:Recommended Status:Assigned Due Date:No Due Date	✕
DETMAR H FINKE Type:Recommended Status:Assigned Due Date:No Due Date	✕
KEVIN CHAD WALKER Type:Recommended Status:Assigned Due Date:No Due Date	✕

Assignment Options:
Selected users (6)

Type:
☐ Required
☒ Recommended
☐ Ignore Previous Completions

Start Date:
☒ Today
☐ Days from today
☐ On

Time zone:
UTC

Priority:
None

Due Date:
☒ No Due Date
☐ Within Days
☐ By

Time zone:
UTC

Assignment Notes:

Status:
Assigned

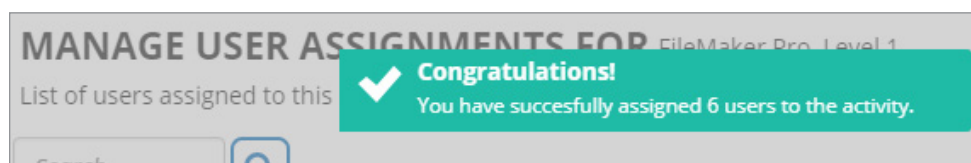
9 **APPLY TO SELECTION**

10 **CANCEL** **BACK** **DONE**

11 ✕

10. Click on the **DONE** button

A confirmation message will appear at the top of the screen.



11. Click the gray "X" **close icon** in top right of overlay window

The manager is then returned to the employee's Exception Report and the new assigned activity is now displayed.



Editing Training Assignments

To edit an assigned training activity for your employee...

1. **Goto** employee's Detailed Exception Report
2. **Select** the activity you want to edit (it will highlight in light blue)

The summary for that activity will appear below the Activity listing

3. From the **Other Actions** dropdown menu select **Edit Assignment**

The screen updates to the **Edit Assignment** function

DETAILED EXCEPTION REPORT BY USER TAMARA J ARTHUR

Overall Progress 33%

List of activities assigned to this user.

Current Assignments

Last Processed: Tuesday, November 7, 2017 1:05:43 PM PST

Refresh

Add

Print

Export

Show all assignments (3)

Filter by:

Assignment Status

Assigned(1)

Complete...

Expired(1)

Assignment Type

Assignment By

Activity Name	Assignment Type	Due date
2012 UC Ethical Values and Conduct eCourse	Required	1/11/2018
FileMaker Pro, Level 1	Recommended	-
UC Sexual Violence and Sexual Harassment Prevention Training ...	Required	11/5/2017

Records 1-1 of 1

Page 1 of 1

FILEMAKER PRO, LEVEL 1

SUMMARY

Other Actions

Edit Assignment

Remove Assignment

Description:

This course introduces basic database concepts, as well as how to plan and create a new database in FileMaker learn how to define and edit fields, how to use shortcuts to enter and edit data, and how to find and sort record the Layout mode to create reports and mail labels. You will be introduced to relational database theory, and you relational database using lookups, repeating fields, and simple calculation fields.

This course meets for two half-day sessions held over two consecutive weeks.

Topics Covered:

- Database Management
- Relational Database Introduction
- Creating a Database
- Entering Records
- Laying Out Data
- Finding and Sorting
- Mailings

Instructor: Frank Widman, Principal Technical Training & Compliance Analyst

Activity Type: ILT Course

Assignment Status: Assigned

Location: Kerr Room 8 (Kerr Hall)

Assignment By: User

EDIT ASSIGNMENT FOR TAMARA J ARTHUR

Learning Activity Name: FileMaker Pro, Level 1

Assignment Options:

Type:

☐ Required

☒ Recommended

☐ Ignore Previous Completions

Start Date:

☐ Today

☐ Days from today

☒ On 11/7/2017

Time zone:

UTC

Priority:

None

Due Date:

☒ No Due Date

☐ Within Days

☐ By

Time zone:

UTC

Assignment Notes:

Status:

Assigned

CANCEL

DONE



Remove Employee Assignment

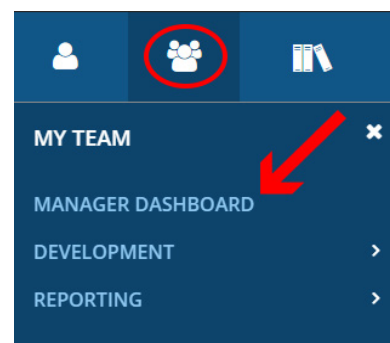
To remove an Employee's assignment goto **Step 3** above and select **Remove Assignment** from the dropdown **Other Actions** menu.

Select **OK** from the Warning! dialog box (or **CANCEL** to exit and not remove the assignment)

Manage Employee Assignments

A manager can manage activity assignments for their direct reports or viewable users by going to an activity and selecting Manage Assignments. From there they can manage multiple users

1. Click on the **Team icon** in blue navigation bar
2. Click on **Manager Dashboard** text link
3. Click **ACTIVITIES** to change the **Exemption Report** to display Activities from Users
4. Click on the desired activity (the activity icon or title text)
5. Select **Manage Assignments** from the REGISTER drop-down menu



BLOODBORNE PATHOGENS

Topic

Nancy Terry

Introduction to safe use of work with blood (and blood products) and other potentially infectious materials.

Topics include:

- Bloodborne Pathogens Standard
- Epidemiology & symptoms
- Modes of transmission
- Exposure control plan
- Tasks & activities
- Methods of compliance
- PPE selection
- PPE decontamination
- Hepatitis B vaccination
- Emergency procedures
- Exposures
- Post-Exposure
- Signs & labels
- Waste
- Questions & answers

SHARE

ACTIVITY SUMMARY

REGISTER **EXPAND ALL** **COLLAPSE ALL** **CLOSE**

Additional Information

Below are the additional details about this activity such as:

Code: SC-BBP-TOP

Activity status: Active

Contact: biosafety@ucsc.edu

Instructors: LISA MARIE WISSER, KARIANNE TERRY

Training organization: UCSC

Library Details

Certification Details

View Details

Add to Favorites

Manage Assignments



Show All Current Assignments

1. Click on the **Show all assignments (9)** text link (the number shows how many are assigned). *see image on next page*

The managed assignment list displayed can be filtered by status, type and assigned by.

Add New Users to Activity

To add new users to the selected activity...

1. From the drop-down menu (1) select **All Viewable Users** or **Direct Reports** depending on your departmental structure.

Manage Assignments

MANAGE USER ASSIGNMENTS FOR Bloodborne Pathogens

List of users assigned to this activity.

Search

Last Processed: Monday, September 25, 2017 2:39:15 AM PDT Current Assignments ▾

Refresh Add **2** Print Export

<input type="checkbox"/> Name ^	User Number	Assignment Date	Due date	Priority
<input type="checkbox"/> ALEXIS CID		7/21/2017	9/22/2017	
<input type="checkbox"/> TADIWOS KASSAHUN MARIE		7/21/2017	9/22/2017	
<input type="checkbox"/> MATTHEW STERLING NERLAND		7/21/2017	9/22/2017	
<input type="checkbox"/> ASANTE TALIB NKOSI		7/21/2017	9/22/2017	

Records 1-4 of 4 Page 1 of 1

Filter by:

- Assignment Status
- Assignment Type
- Assignment By

1 All Viewable Users (9) Show all assignments (9)

2

3

4

Direct Reports

All Viewable Users

SELECT USERS

Select either one or all users to set assignment options.

Search

<input type="checkbox"/> Name ^	User Number
<input type="checkbox"/> ALICIA CECILE FREEDMAN	
<input type="checkbox"/> NOEMI GARIBAY	
<input type="checkbox"/> MADELINE ELIZABETH GOSS-CARPENTER	
<input type="checkbox"/> JUAN CARLOS HERNANDEZ-FELIX	
<input checked="" type="checkbox"/> SOPHIA LANE HUTCHEON	
<input checked="" type="checkbox"/> LEAH MORGAN LANGFORD	

Records 1-15 of 40 Page 1 of 3 Go To Page

CANCEL NEXT



4. Click on the **NEXT** button (4)
5. Select the user(s) that will have the Assignment Options assigned to:
 - Select **ALL** or **click** to select individual user
 - **CTRL click** to select multiple users
6. **Click** the **NEXT** button
7. For the list of selected users, you can then set the following attributes:
(refer to image on next page)
 - Required or Recommended assignment type
 - Ignore previous completions
 - Set the start date:
 - Today
 - # of days from now
 - Specific date
 - Set the time zone

NOTE: Do Not use the Priority setting

 - Set the Due Date
 - No Due Date
 - Within XX Days
 - Specific Date
 - Set the time zone

NOTE: Do Not use the Priority or Assignment Notes settings
8. **Click** the **APPLY TO SELECTION** button
(refer to image on next page)
9. **Click** the **DONE** button

BLOODBORNE
PATHOGENS

ACTIVITY SUMMARY

REGISTER

EXPAND ALL

COLLAPSE ALL

CLOSE

Topic

Nancy Terry

Introduction to safe use of world
(and blood products) and other
infectious materials.

Topics include:
Bloodborne Pathogens Standard
Epidemiology & symptoms
Modes of transmission
Exposure control plan
Tasks & activities
Methods of compliance
PPE selection
PPE decontamination
Hepatitis B vaccination
Emergency procedures
Exposures
Post-Exposure
Signs & labels
Waste
Questions & answers

SHARE

Additional Information

Below are the additional details about this activity such as facility, location and so on.

Manage Assignments

EDIT ASSIGNMENTS FOR Bloodborne Pathogens

Select either one or all users to set assignment options.

Select: All | None

Sort by: Name



ENRIQUE M ABREU

Type:Recommended | Status:Assigned
Due Date:No Due Date

SAMI MASADA AKIBA

Type:Recommended | Status:Assigned
Due Date:No Due Date

COLIN DEAN ALLISON

Type:Recommended | Status:Assigned
Due Date:No Due Date

JASMINE KAUR BAJWA

Type:Recommended | Status:Assigned
Due Date:No Due Date

LANDON JAMES CARDENAS

Type:Recommended | Status:Assigned
Due Date:No Due Date

MELISSA CUEVAS

Type:Recommended | Status:Assigned
Due Date:No Due Date

SOPHIA LANE HUTCHEON

Type:Recommended | Status:Assigned



7

Assignment Options:

Selected users (8)

Type:

☐ Required☒ Recommended☐ Ignore Previous Completions

Start Date:

☒ Today☐ Days from today☐ On

Time zone:

UTC

Priority:

None

Due Date:

☒ No Due Date☐ Within Days☐ By

Time zone:

UTC

Assignment Notes:

Status:

Assigned

8

APPLY TO SELECTION

9

If some options are not available, select individual assignments to set options.

CANCEL

BACK

DONE



Monitor Team Goals

You can monitor your team's progress by analyzing their training.

To conduct a training analysis for a managed user:

1. In the Header menu, **click** the **MyTeam** icon.
2. Navigate to the **Manager Dashboard**.
3. Under the desired employee's name in the **Exception Report** section, select **PROFILE > Training Analysis** from the dropdown menu.

From here (in Emulation mode), you can:

- View upcoming or completed training.

Use the **View** options to narrow the list by:

- All assigned training (both required and recommended)
- Training assigned by job or organization
- Training assigned directly
- Training certifications
- Assigned training requiring registration
- All Completed assigned training
- Certifications history: All attempted certification training. This view includes details such as activity name, expiration date, and certification status.
- **Register** for or **Launch** an activity.
- Click an activity name to view its Activity Summary page.



Export Exception Reports

There are two general types of exception reports: User reports and Activity reports. Within each of those report types, a Summary report or Detailed Exception report can be generated.

User Exception Reports

Exception reports can be generated for employees (direct reports or viewable users) that a manager has permission to view. Reports can be generated for the complete team (summary report) or an individual employee (detailed report).

Note: Exception Reports track Assigned training and my not show other activities employees are registered for.

The screenshot displays the 'EXCEPTION REPORT' interface. On the left, a sidebar shows 'My Team' and 'Quick Links'. The main area is titled 'EXCEPTION REPORT' and includes a 'LEARNING ACTIVITIES' section. Below this, there are tabs for 'USERS (6)' and 'ACTIVITIES'. The 'USERS' tab is active, showing a list of users. The 'Export' button is highlighted with a red circle and a red '3'. Below the button, two user profiles are displayed: TAMARA J ARTHUR and NATHAN BENJAMIN BALLARD. TAMARA's profile shows a progress bar at 20% and a red '3B' next to it. NATHAN's profile shows a progress bar at 40%. Both profiles have a '4 INCOMPLETE' button.

User Summary Report (all direct reports or viewable users)

1. In the Header menu, **click** the **MyTeam** icon.
2. Navigate to the **Manager Dashboard**.
3. From the **USERS** Exception Report click **Export** just above the upper left user
4. Select Export settings, click **NEXT**, click on the **File** link, then **OK**. File is downloaded to browser window

Detailed Exception Report by User (single direct report or user)

1. In the Header menu, **click** the **MyTeam** icon.
2. Navigate to the **Manager Dashboard**.



- From the **USERS** Exception Report select the desired employee and **click** on the blue **X INCOMPLETE** button in the lower right area for that user (see 3B in image above)

The Detailed Exception Report by User page appears.

DETAILED EXCEPTION REPORT BY USER TAMARA J ARTHUR

List of activities assigned to this user.

Overall Progress: 20%

Search: [] Current Assignments Last Processed: Monday, November 13, 2017 9:04:57 PM PST

Refresh Add Print Export

Activity Name	Assignment Type	Due date	Progress
Adobe Acrobat Basics	Required	-	0%
FileMaker Pro, Level 1	Recommended	-	0%
FileMaker Pro, Level 2	Required	-	0%

Records 1-3 of 3 Page 1 of 1

ADOBE ADOBE BASICS SUMMARY Other Actions

Description: This class shows you how to use Adobe Acrobat to create documents that can be opened by anyone and then viewed and printed exactly as intended, with page layout, formatting, and images intact. You will convert documents to Adobe Portable Document Format (PDF). PDF files can be opened by anyone who has Acrobat or Acrobat Reader, and have become the standard for delivering documents to and sharing documents with others via the Web. You will learn about a variety of ways for converting documents to PDF and the various methods and scenarios for publishing and viewing PDF documents on the Web. You will be shown how to use Acrobat Distiller to create your PDF files, and how to add bookmarks and links to the document. Finally, you will learn how to use Acrobat in a document review cycle.

Topics Covered:

- Getting to Know the Work Area
- Creating Adobe PDF from Microsoft Office
- Creating Adobe PDF files from other applications
- Enhancing and Editing PDF Documents
- Adding bookmarks, links and commenting

Suggested Prerequisite: Introduction to Macintosh or Windows or equivalent experience.

Instructor: Barbara Ash, Adobe Certified Instructor

Activity Type: ILT Course

Assignment Status: Assigned

Location: Kerr Room 8 (Kerr Hall)

Assignment By: User

- Click on the **EXPORT** link
- Select Export settings, click **NEXT**, click on the **File** link, then **OK**. File is downloaded to browser window.

Activity Exception Reports

Exception reports can also be generated for activities that their direct reports or viewable users are assigned to.

Reports can be generated for the complete team (summary report) or an individual employee (detailed report).



The screenshot displays the 'EXCEPTION REPORT' interface. On the left, a sidebar shows 'My Team' and 'Quick Links'. The main area is titled 'EXCEPTION REPORT' and includes a 'Print' button and a 'Last updated' timestamp. Below this, there are tabs for 'USERS (6)' and 'ACTIVITIES (6)'. The 'ACTIVITIES' tab is active, showing a list of activities with progress bars and user counts. The 'Export' button is highlighted with a red circle and the number '3'. The '3B' label is also visible near the bottom right activity card.

Summary Exception Report by Activity

1. In the Header menu, **click** the **MyTeam** icon.
2. Navigate to the **Manager Dashboard**.
3. From the **ACTIVITIES** Exception Report click **Export** just above the upper left activity.
4. Select Export settings, click **NEXT**, click on the **File** link, then **OK**. File is downloaded to browser window.

Detailed Exception Report by Activity

1. In the Header menu, **click** the **MyTeam** icon.
2. Navigate to the **Manager Dashboard**.
3. From the **USERS** Exception Report select the desired employee and **click** on the blue **X INCOMPLETE** button in the lower right area for that user (see **3B** in image above)



The Detailed Exception Report by Activity page appears.

DETAILED EXCEPTION REPORT BY ACTIVITY FileMaker Pro, Level 1
All viewable users who did not complete this assigned activity.

Overall progress: 0%

Current Assignments: ▼

Last Processed: Monday, November 13, 2017 9:04:57 PM PST

Print Export

Name ^	Username	Assignment Type	Assignment Date	Due date	Progress
TAMARA J ARTHUR	1280081	Recommended	11/9/2017	N/A	0%
NATHAN BENJAMIN BALLARD	1850171	Recommended	11/9/2017	N/A	0%
ISABELLA NANCY BOND	1978352	Recommended	11/9/2017	N/A	0%
NATASHA LACHICA ENCINAS	1858854	Recommended	11/9/2017	N/A	0%
DETMAR H FINKE	1631268	Recommended	11/9/2017	N/A	0%
KEVIN CHAD WALKER	1970218	Recommended	11/9/2017	N/A	0%

Records 1-6 of 6 Page 1 of 1

REGISTER OTHERS CLOSE

4. Click on the **EXPORT** link

5. Select Export settings, click **NEXT**, click on the **File** link, then **OK**. File is downloaded to browser window.

Printing Exception Reports

Exception Reports can be printed directly from the UC Learning center by following the above steps for each of the 4 exception report but choose the Print icon link instead of Export. Reports can also be printed from the exported Excel files.



Register Employees for Training

In addition to [assigning training activities](#) to employees, you can also manage registrations of your direct reports or viewable users. You can register the users individually or use batch registration to register multiple users at a time. Similarly, you can cancel the registrations individually or for multiple users.

Register managed users:

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

ALL RESULTS (5)

ACTIVITY (5)

NAVIGATION (0)

REPORTS (0)

TOP RESULTS FOR EXCEL

ACTIVITY (5) [VIEW ALL](#)

Microsoft Excel Basics
This course is designed to teach you how to create, edit, format, and print a document in Excel. You will learn to copy, move, and paste.
ILT Course 3 Hours SC-TD-MEB-SHJ364-ILT **SELECT**

Microsoft Excel Database Features
This class will teach you the basics of using Excel's database features. You will learn how to use filters, including setting up a query.
ILT Course 3 Hours SC-TD-MSEDF-SHJ371-ILT **SELECT**

Microsoft Excel Charting and Linking
This 3-hour class focuses on how to link worksheets to other worksheets or workbooks. You will learn how to add and delete data.
ILT Course 3 Hours SC-TD-MECL-SHJ378-ILT **SELECT**

Register
View Details
Manage Assignments
Register Others

3. **Select** the course or class by clicking the **radio button** then click **CONTINUE** to add users.

NOTE: If this is an in-person training you will need to first select the offering by clicking the radio button of the course you wish them to attend before you can click **Continue**.

All prices quoted per user.

☒ Microsoft Excel Database Features

Available Capacity: Unlimited
Kerr Room 8, Kerr Hall
Santa Cruz

Registration: At least 1

☐ Microsoft Excel Database Features
Thursday, August 24, 2017
9:00 AM PDT - 12:00 PM PDT

Available Capacity: 12
Kerr Room 8, Kerr Hall
Santa Cruz

Cancellation deadline: Friday, August 18, 2017

☐ Microsoft Excel Database Features
Tuesday, December 5, 2017
9:00 AM PST - 12:00 PM PST

Available Capacity: 12
Kerr Room 8, Kerr Hall
Santa Cruz

Cancellation deadline: Wednesday, November 29, 2017

Available Capacity: 12

42.00 USD [Cancellation Policy](#)

All prices quoted per user.

CONTINUE

Select Users

CANCEL SUBMIT RESET



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

CONTINUE

Select Users

AVAILABLE USERS

Available seats: 12
Selected users: 0
Available users: 0
Users not in allocation: 0

Add Select All Clear All

REGISTRATION

Records: 0
Available seats: 12
Users pending approval: 0

Remove All

Name

WAITING LIST

Records: 0

- 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**.

SumTotal

SELECT USERS

Select users by organization

Select users by job

Select users by manager

Select users who require the activity

Select viewable users

Select users by e-mail, user number, username, or NT account (separated by commas or semi-colons)

CANCEL NEXT

- Click **Next**. You now have multiple options 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.

SumTotal

SELECT USERS

Select one or more users from the list below and click OK.

Search: [Help](#)

Selected Items: 3 | Records: 6

<input type="checkbox"/>	Name	Username	Manager	Primary Domain	Primary Job	Primary Organization	Status
<input checked="" type="checkbox"/>	TAMARA J ARTHUR	...	Ken Shaw	UCSC	9022 - RADLG TCHNO...	STUDENT HEALTH CENT...	A
<input checked="" type="checkbox"/>	NATHAN BENJAMIN BALLARD	...	Ken Shaw	UCSC	7003 - CONST INSP A...	PHYSICAL PLANNING &...	A
<input type="checkbox"/>	ISABELLA NANCY BOND	...	Ken Shaw	UCSC		TAPS-A	A
<input type="checkbox"/>	NATASHA LACHICA ENCINAS	...	Ken Shaw	UCSC	4919 - STDT 4	CHANCELLOR/EVC-A	A
<input checked="" type="checkbox"/>	DETMAR H FINKE	...	Ken Shaw	UCSC	7244 - ADMIN ANL AST	STAFF HUMAN RESOURC...	A
<input type="checkbox"/>	KEVIN CHAD WALKER	...	Ken Shaw	UCSC	2310 - TEACHG ASST-...	DIVISION OF ARTS	

8. Click the **Top Arrow** button to **move** the selected users over to **REGISTRATION**.

[CONTINUE](#)

Select Users

☐ Skip registering users to activities that have not contributed to the overall completion of the activity structure

AVAILABLE USERS

Available seats: 12
Selected users: 3
Available users: 3
Users not in allocation: 0

Add Select All Clear All

<input type="checkbox"/>	Name	Status
<input checked="" type="checkbox"/>	TAMARA J ARTHUR	No issues
<input checked="" type="checkbox"/>	NATHAN BENJAMIN BALLARD	No issues
<input checked="" type="checkbox"/>	DETMAR H FINKE	No issues

REGISTRATION

Records: 0
Available seats: 12
Users pending approval: 0

Remove All

Name

WAITING LIST

Records: 0

Remove All

Name



9. Click **Submit** once all users you wish have been moved over.

AVAILABLE USERS

Available seats
Selected users: 0
Available users: 0
Users not in allocation: 0

Add Select All Clear All

Name	Status
------	--------

→

☐ Skip registering users to activities that have not contributed to the overall completion of the activity structure

REGISTRATION

Records: 3
Available seats: 9
Users pending approval: 0

Remove All

Name	
TAMARA J ARTHUR	×
NATHAN BENJAMIN BALLARD	×
DETMAR H FINKE	×

WAITING LIST

Records: 0

Remove All

Name

→

CANCEL **SUBMIT** RESET

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.

Cancel Employee Registration

1. In the Header menu click on the My Team icon
2. Navigate to the **Manager Dashboard**

TAMARA J ARTHUR
test.email@ucop.edu

Username: 1280081

Required: 1 (1 Certifications)

Recommended: 33%

33%

PROFILE

Self-Reported Training 2 INCOMPLETE

Training Analysis

Training Schedule

Training Transcript

ISABELLA N...

test.email@ucop.edu

Username: ...

Required: ...

Recommended: 0%

MY TEAM

MANAGER DASHBOARD

DEVELOPMENT

3. **Select the Training Schedule** item from the PROFILE dropdown menu of the employee's Exception Report



4. **Check** the **checkbox** beside the desired activity
5. **Click** the **Cancel Registration** text link

TRAINING SCHEDULE
This is a list of current training activities for which you are registered.

Search ...

CURRENT/UPCOMING EXPRESSED INTEREST PENDING SIGNATURES COMPLETED CANCELED WAITING LIST OR PENDING APPROVAL

ALL **ONGOING ACTIVITIES** UPCOMING ACTIVITIES FIXED DURATION ACTIVITIES

Displaying 1 of 1 Records 10 25 50 100

Export To Excel Print Cancel Registration View Calendar

	Activity Name	Status	Code	Region	Start Date	End Date	Actions
	FileMaker Pro, Level 1 ILT Course	REGISTERED	SC-TD-FMPL1-SHJ366-ILT				
<input checked="" type="checkbox"/>	FileMaker Pro, Level 1 ILT Class	REGISTERED	SC-TD-FMP Level1 -2017.11.21		11/21/2017	11/21/2017	

6. After the screen refreshes **click** the **CANCEL MARKED** button in lower right

The screen returns to the employee's **TRAINING SCHEDULE** (still in Emulation mode)

7. **Click** the yellow eye in upper left and then the **Exit Emulation** text link to return to the manager's Home Page