UC LEARNING CENTER
Manager Guide

UC SANTA CRUZ

UNIVERSITY OF CALIFORNIA

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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 compatability, 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

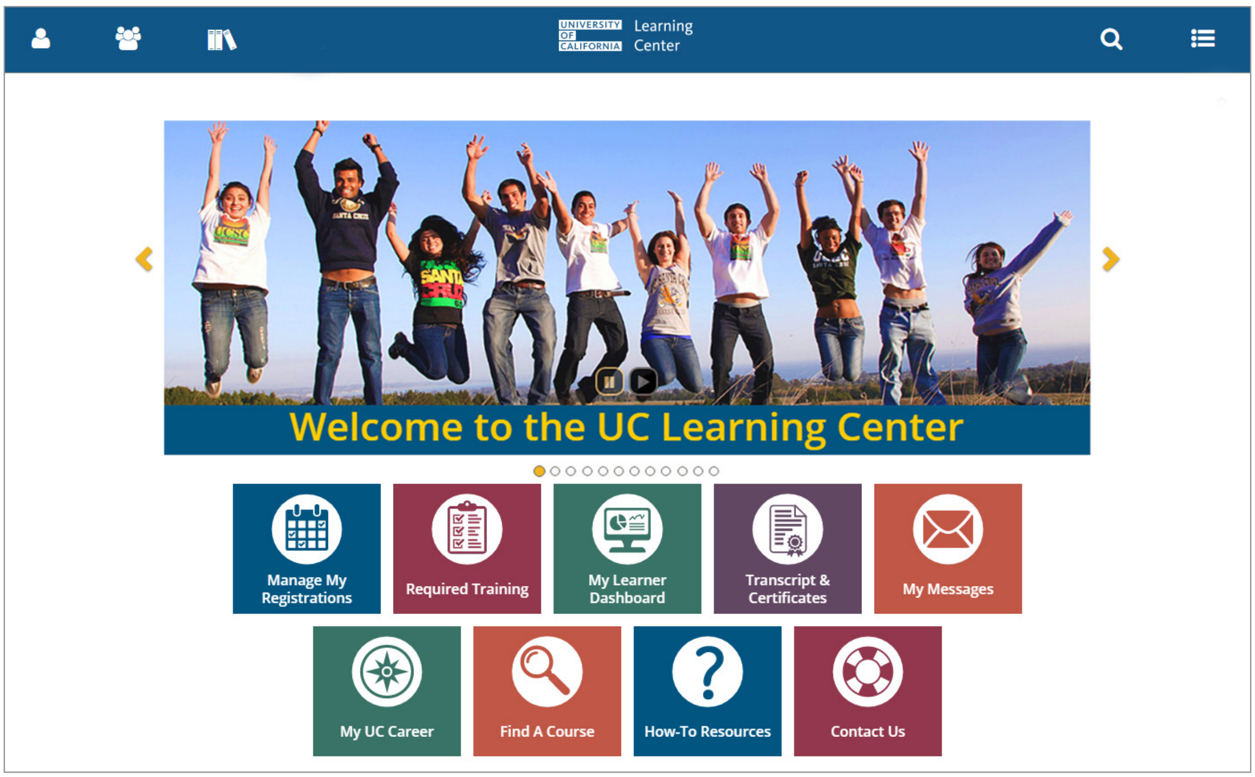
For assistance with the UC Learning Center, email LearningCenter@ucsc.edu

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 relavent 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.

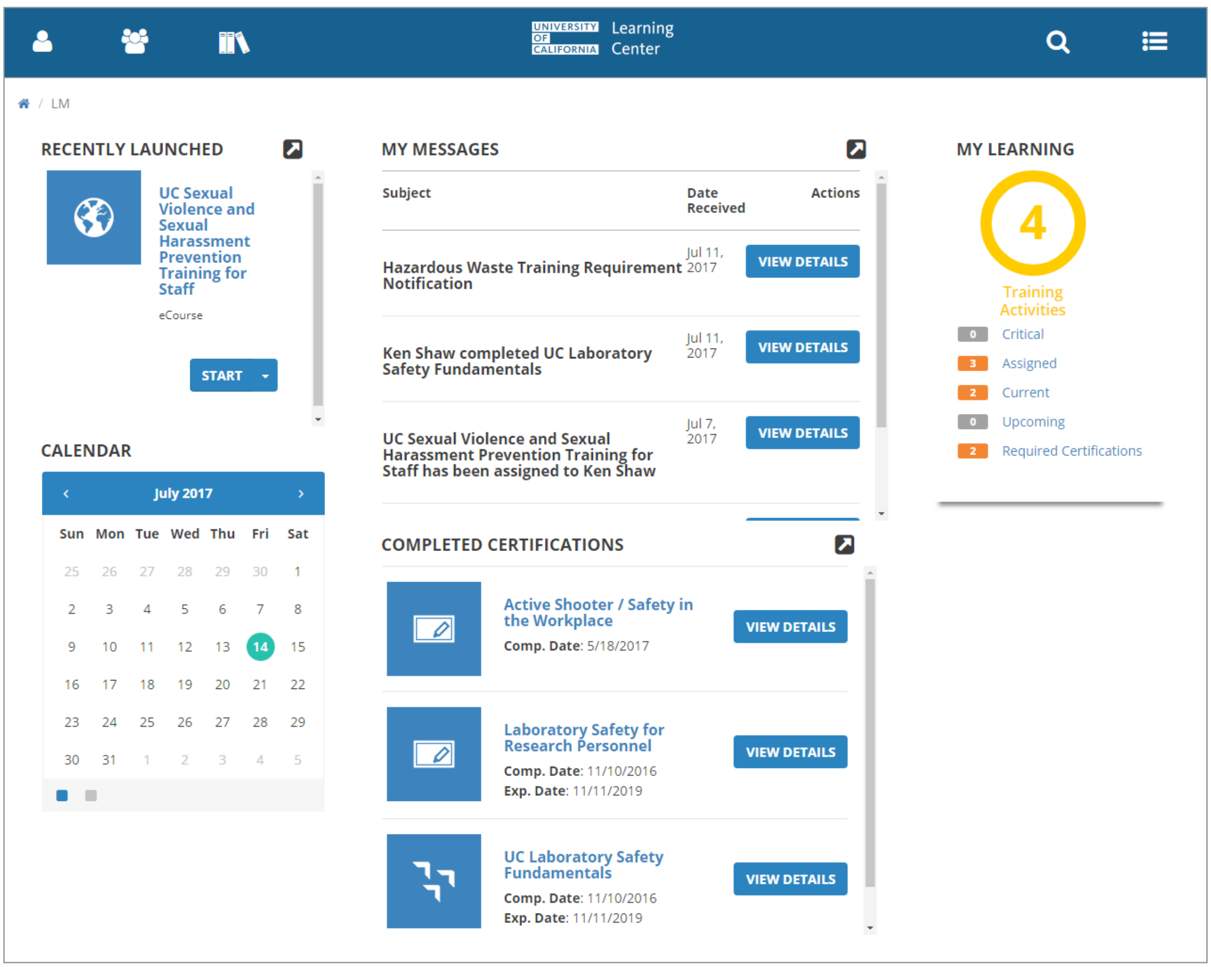
My Messages: View user's messages

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.

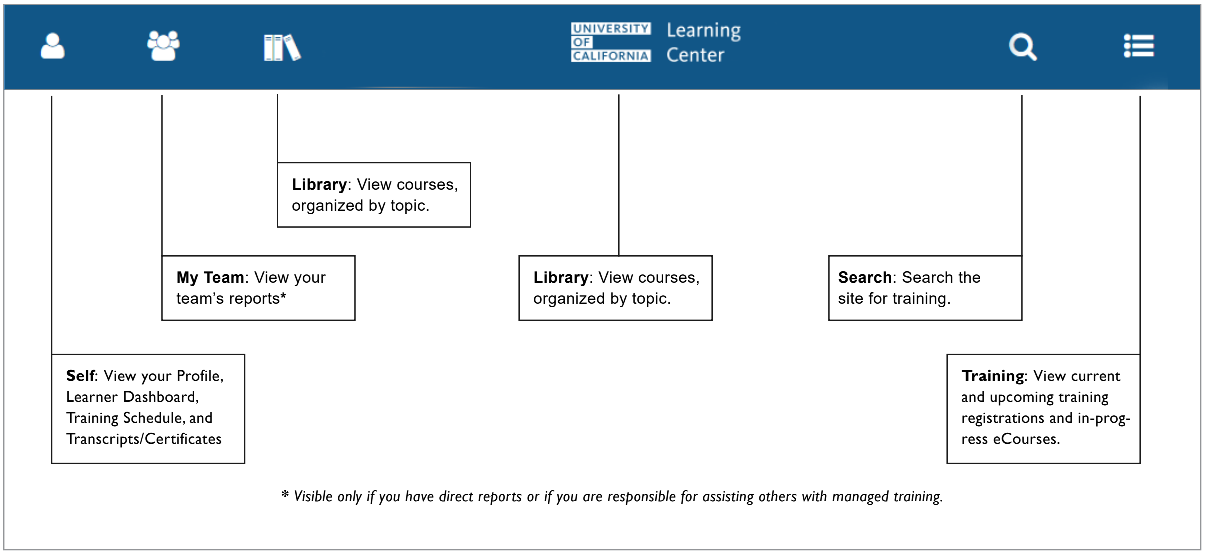
Support: Send email to learningcenter@ucsc.edu.

My Dashboard (Learner)

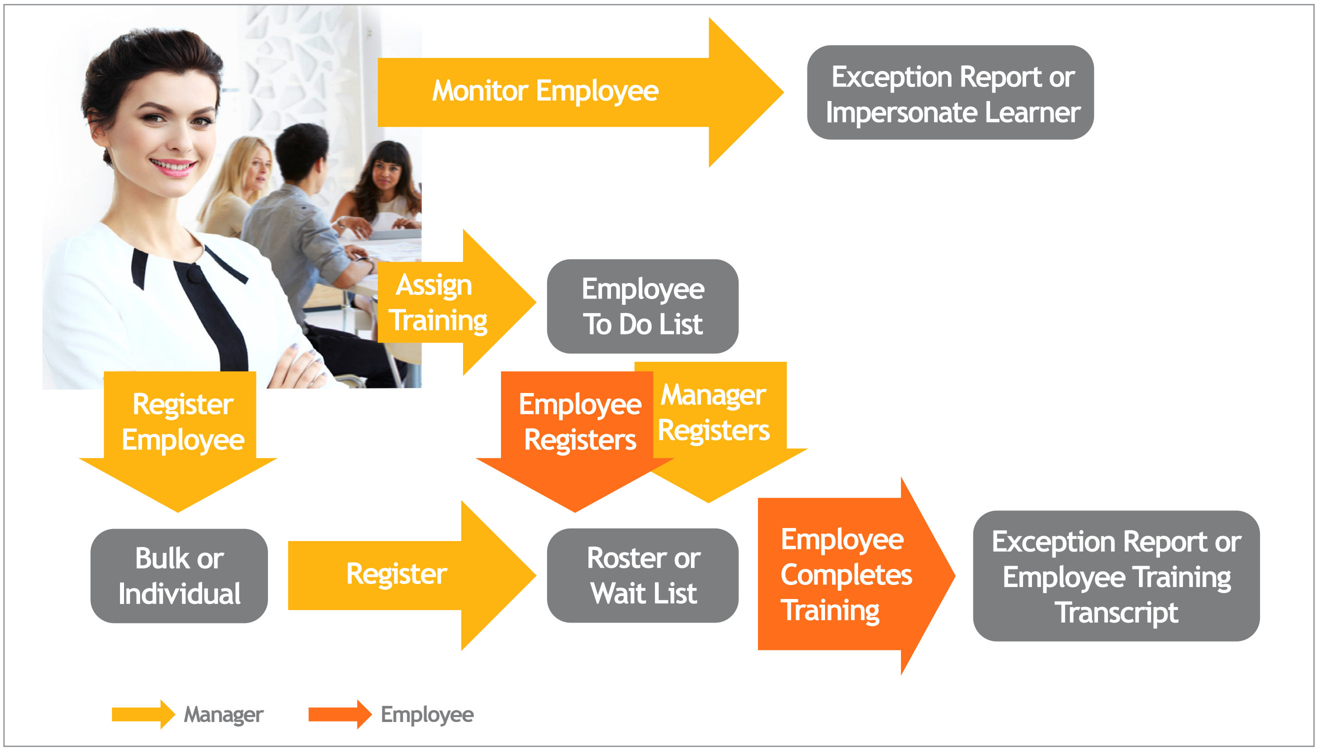


Top Menu

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 developmentls.

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.

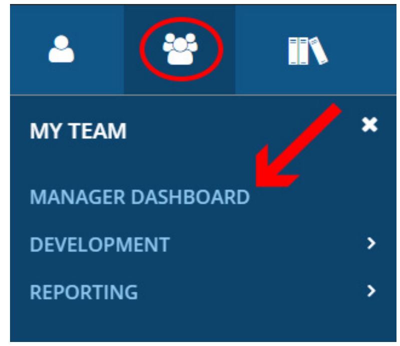
Please contact LearningCenter@ucsc.edu if you have any questions.

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

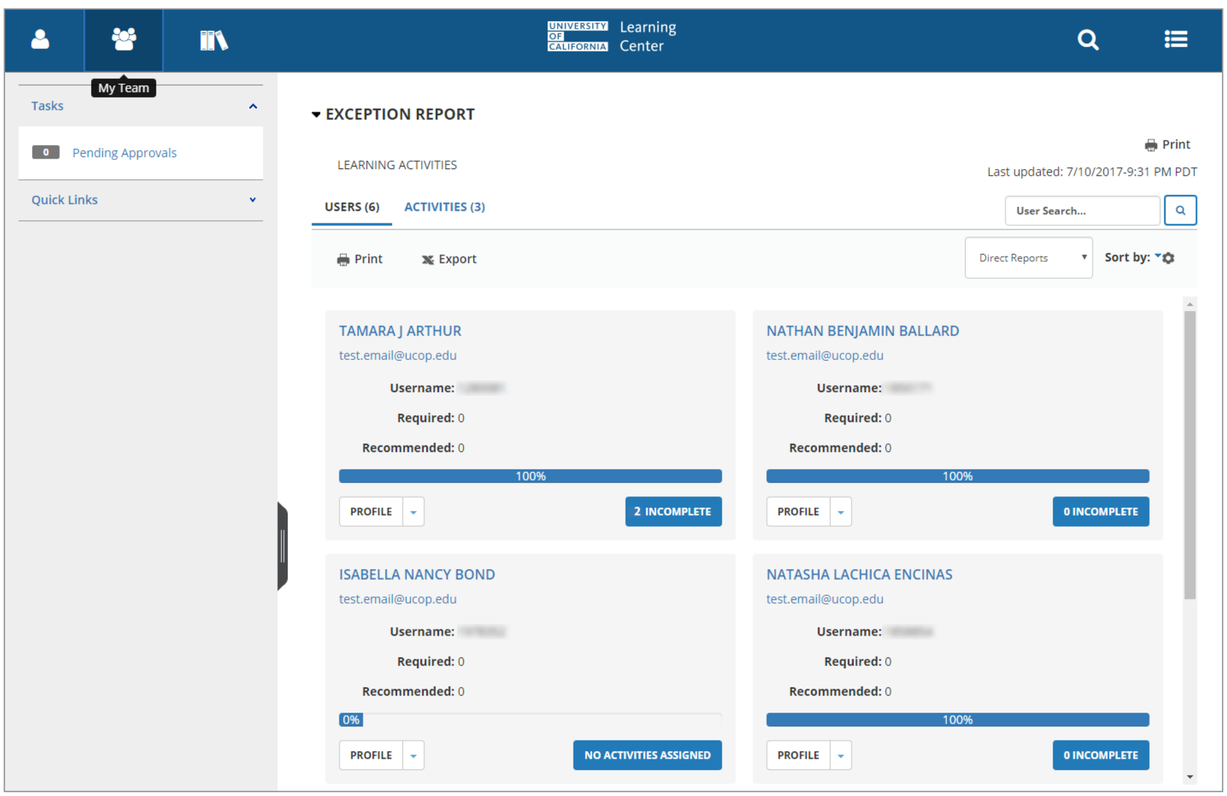


Once you have been identified as the manager of a user in the UC Learning Center, you will automatically have the **My Team** icon appear in the Top Menu. This will give you access to a **Manager Dashboard**.

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.

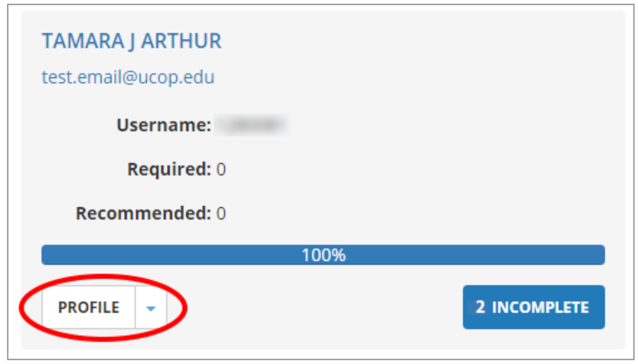


Note*:*
Manager Dashboard is updated nightly, so if one of your users completed training after the last update, it will not appear in this view until the next update. However, the user's training transcript and schedule are displayed in real time and will show you their latest status.

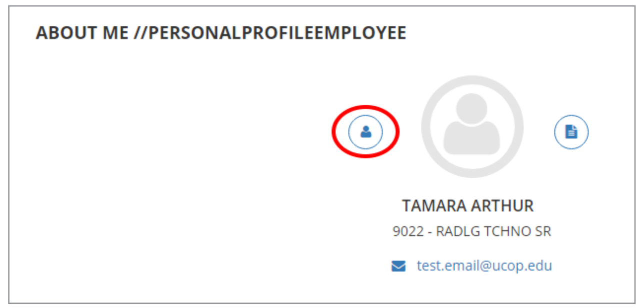
View Employee Profile

To access an employee's profile...

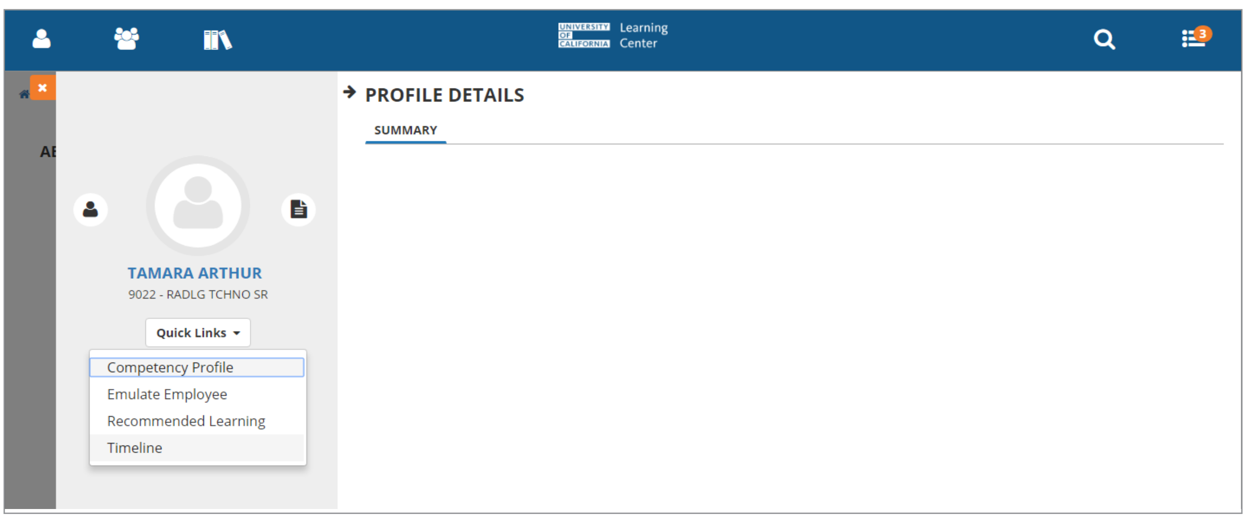
1. **Click** on the **Profile** Button



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



3. The employee's Profile Details pullout appears

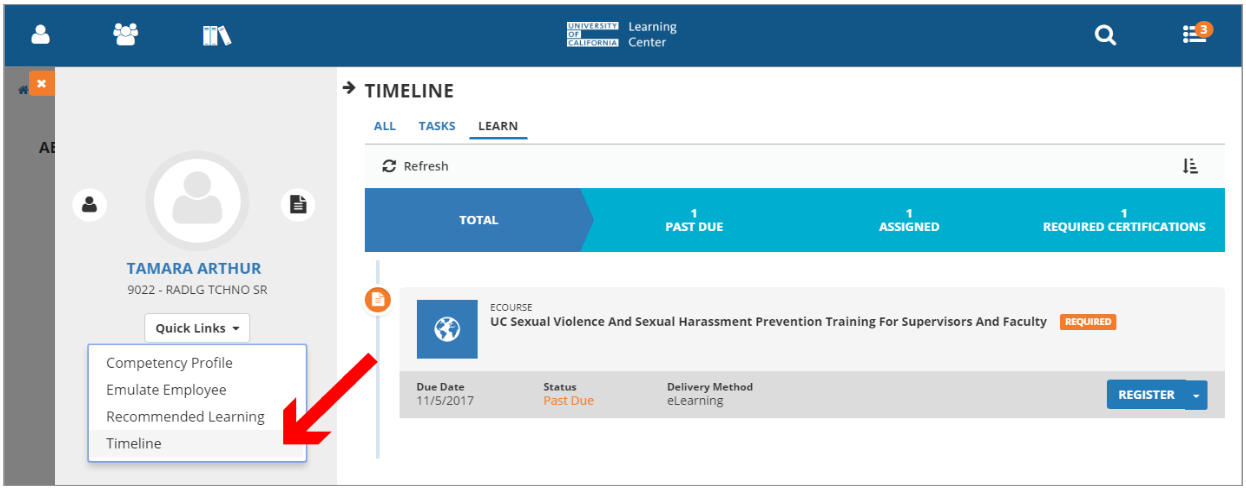


4. From the Quick Links drop down menu, select Timeline, Recommended Learning or Emulate Employee (see below).

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.



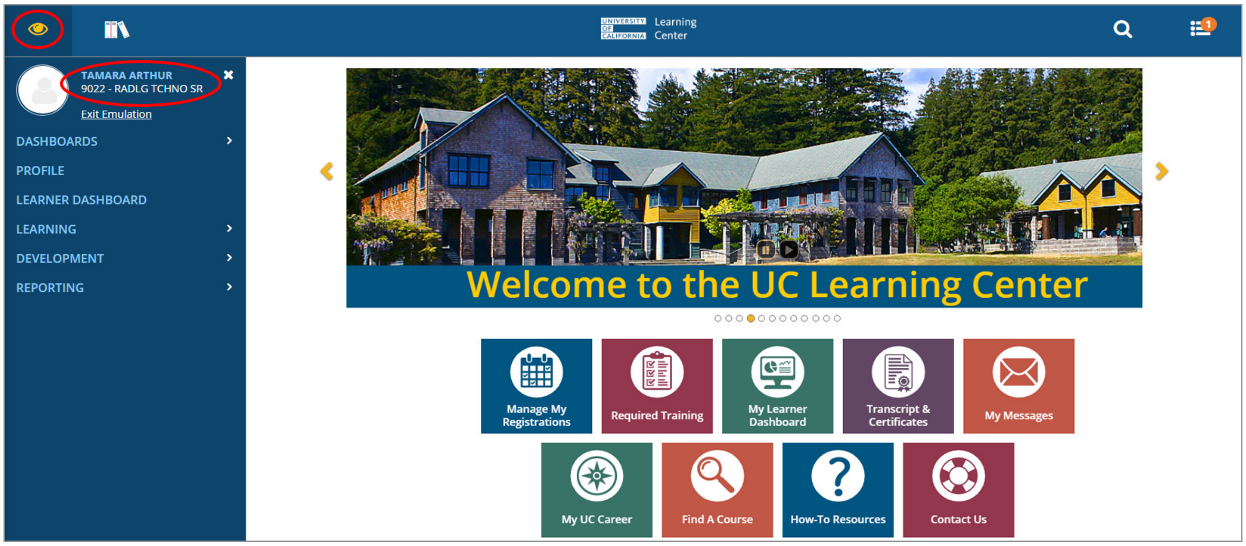
Emulate Employee

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.

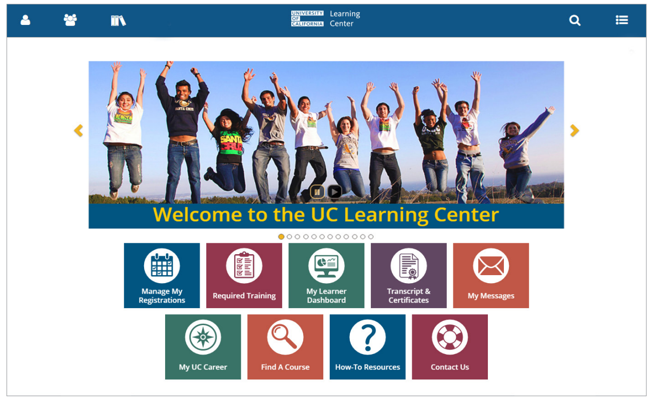
When in Emulation mode, note the yellow eye in the upper left corner. Click on the yellow eye icon to launch the left popout navigation area. Note the employee's name and job title.

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



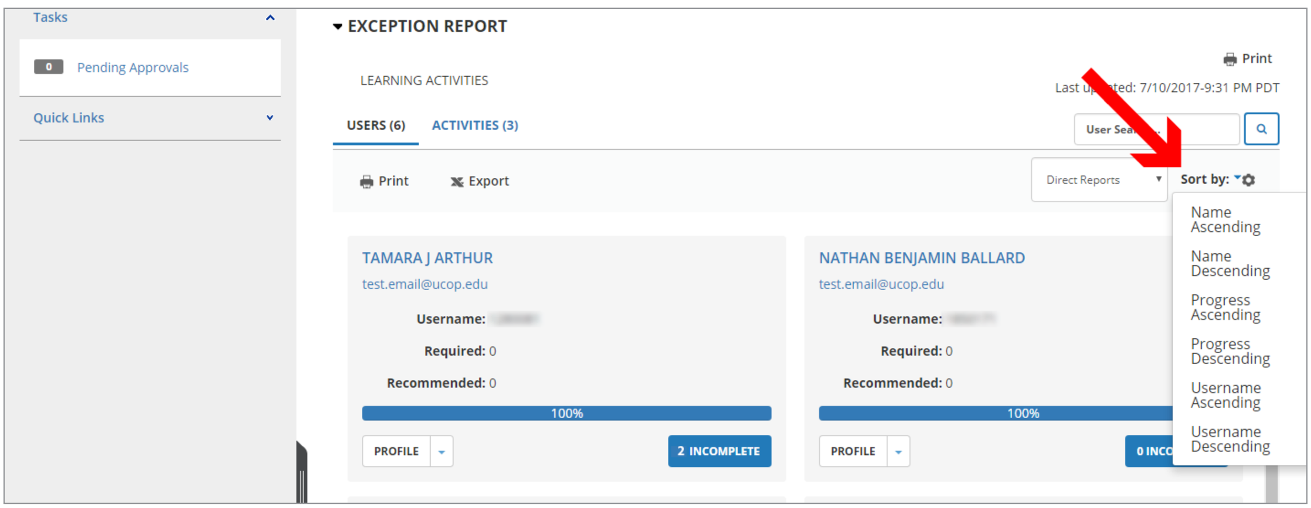
To exit the Employee Emulation mode, click on the text link **Exit Emulation** just below the employee's name.

The manager will be returned to their own landing page.

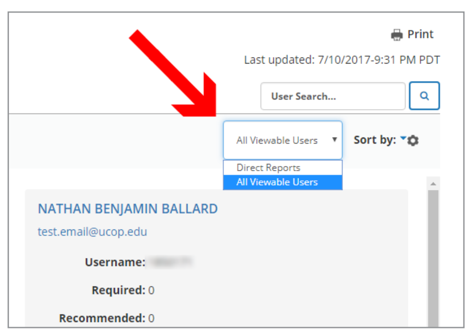
View Managed Employees Activities

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).



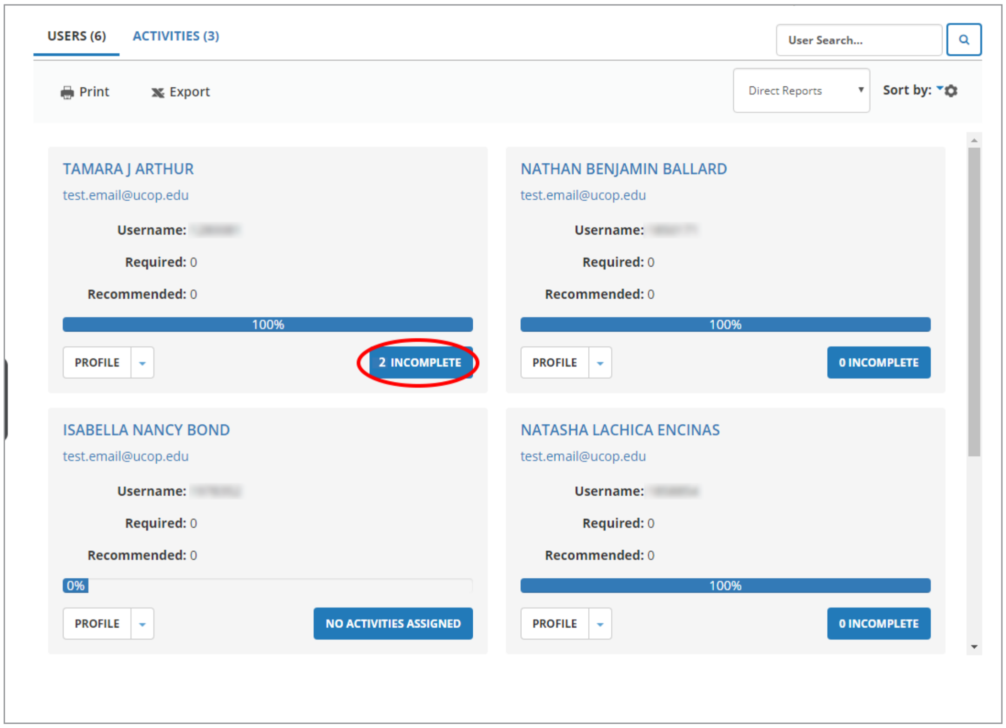
Choose Direct Reports or All Viewable Users



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.



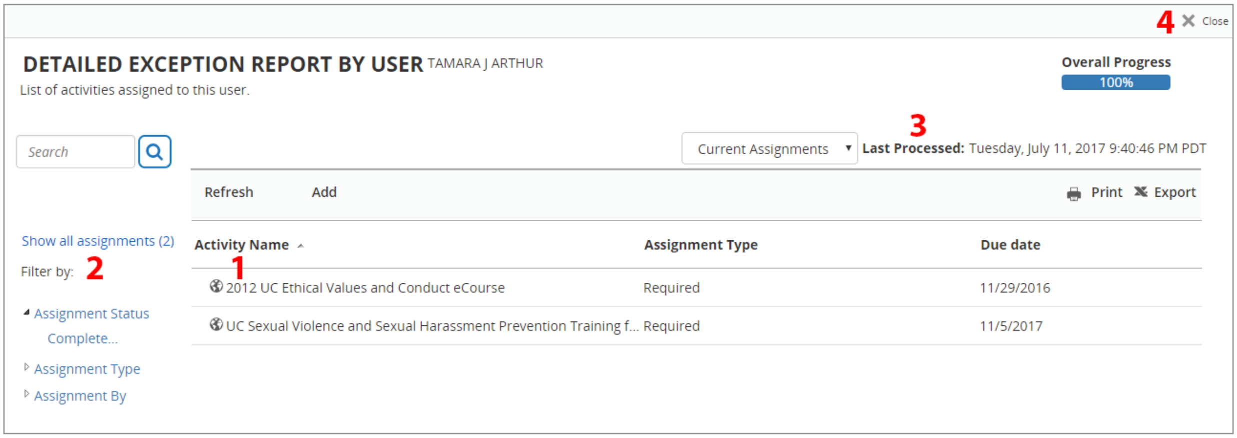
For each individual, you will see the overall status of their currently assigned training. Click the blue **Incomplete** button to see a more detailed report. Remember, you can also sort this list by process.

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.

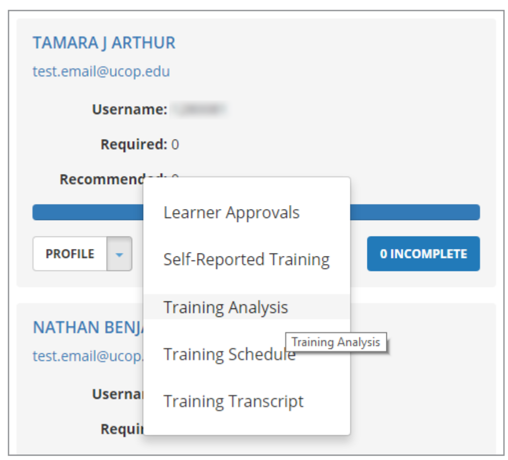


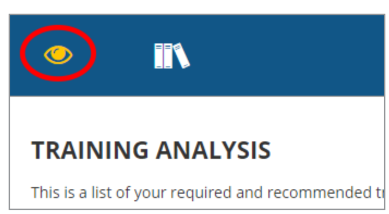
1. Clicking the **Title** of the course will show you more information about the training.
2. Using the menu bar on the left side, you can filter the training to show only what assignments are Overdue or what has been **Completed**.
3. You will see when the information was **Last Processed** in the top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

Training Analysis (User Emulation mode)

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

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



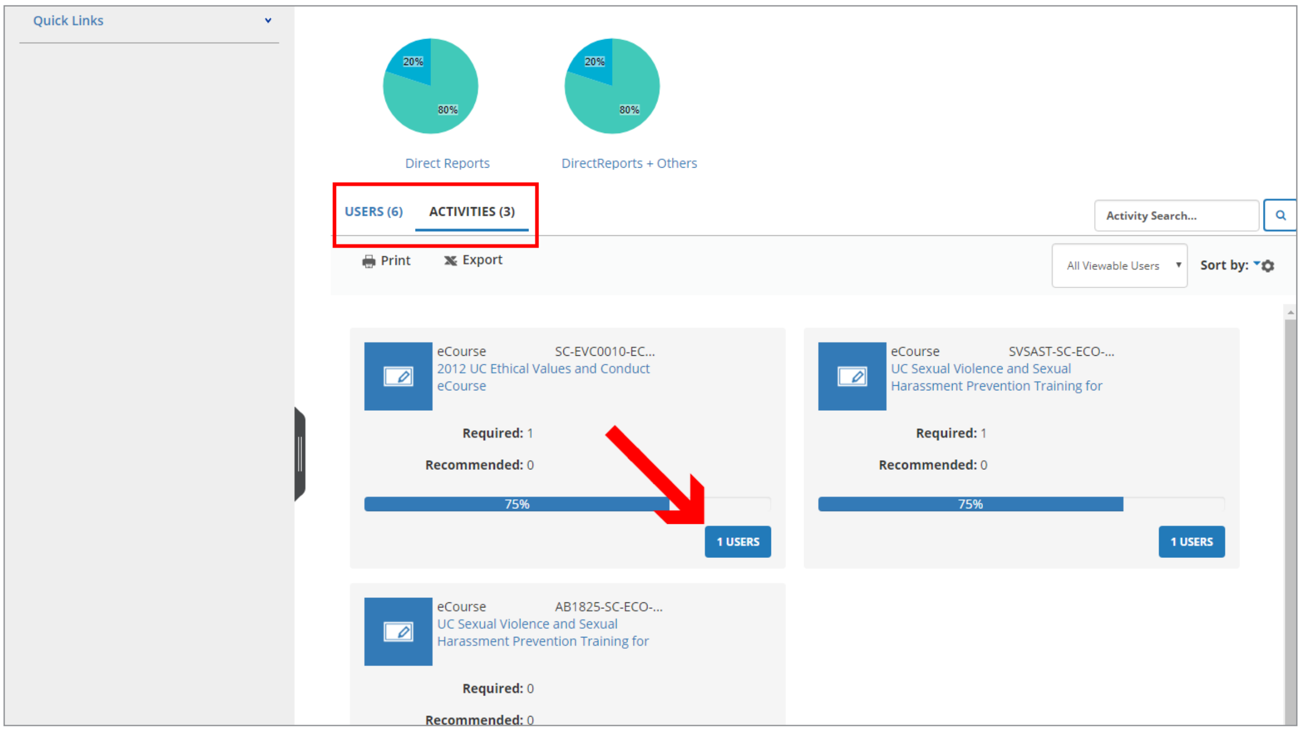


Assigned Training by Activity

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.

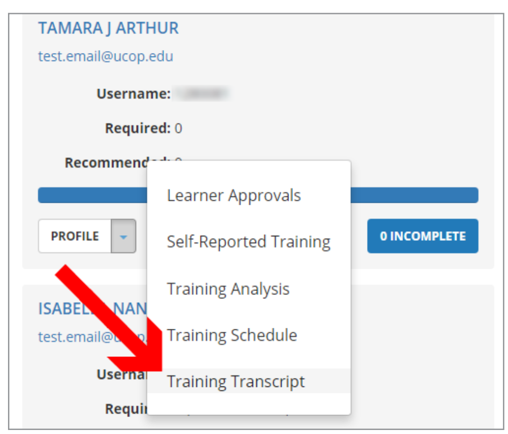
Click on the blue **Users** button to see who is still required to complete the training.



Training Transcript (User Emulation mode)

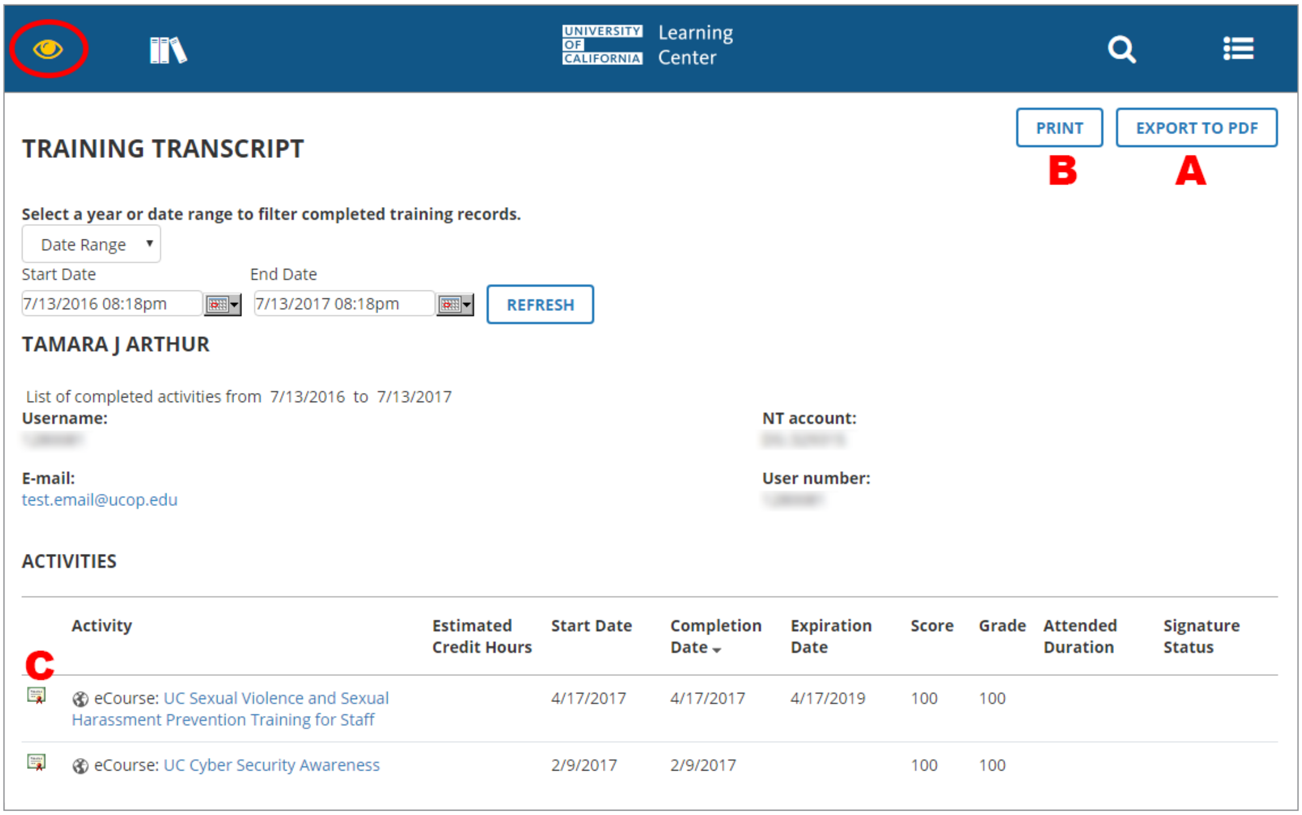
To view all completed training for a managed user, you can view their training transcript.

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.



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.

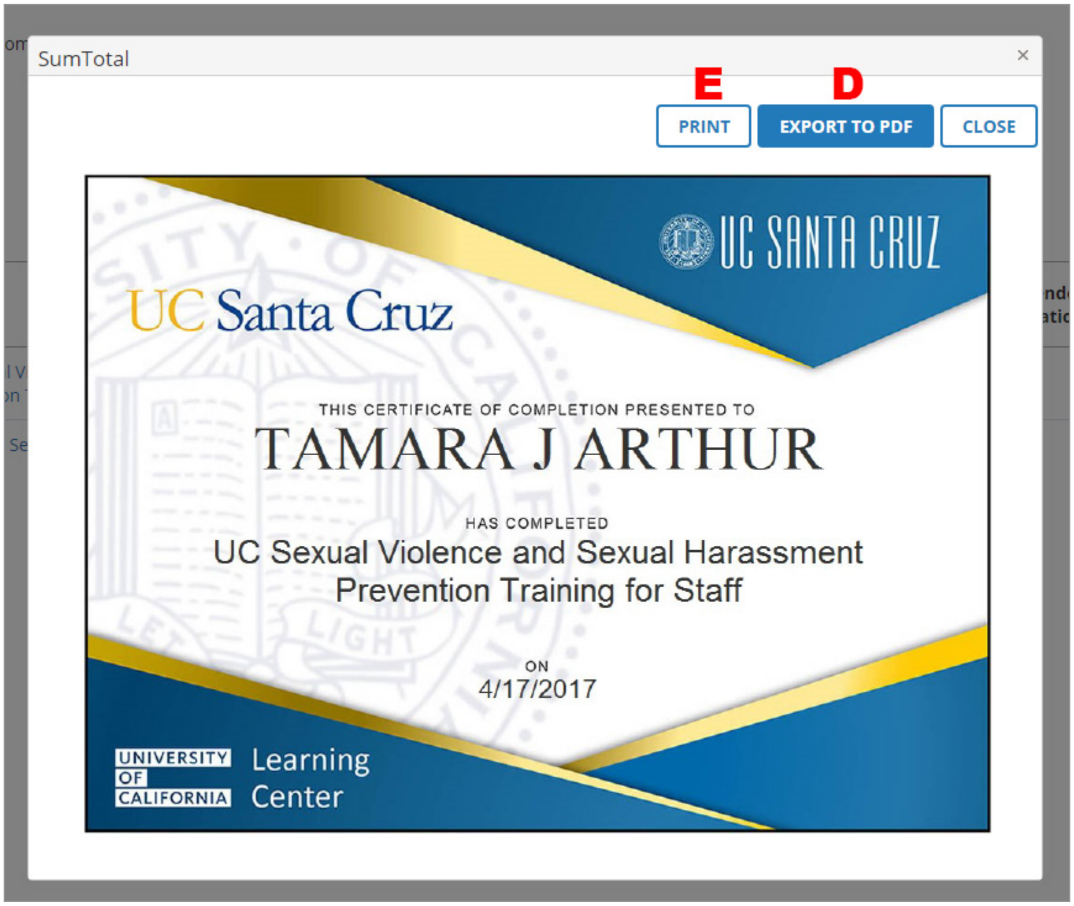
Print Training Transcript

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.

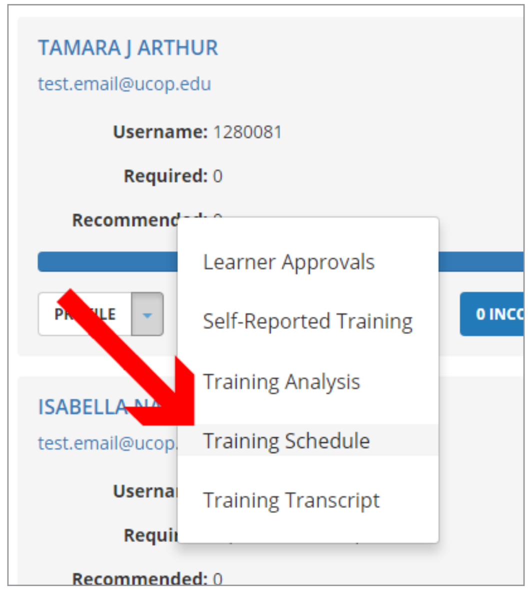
Print Diploma

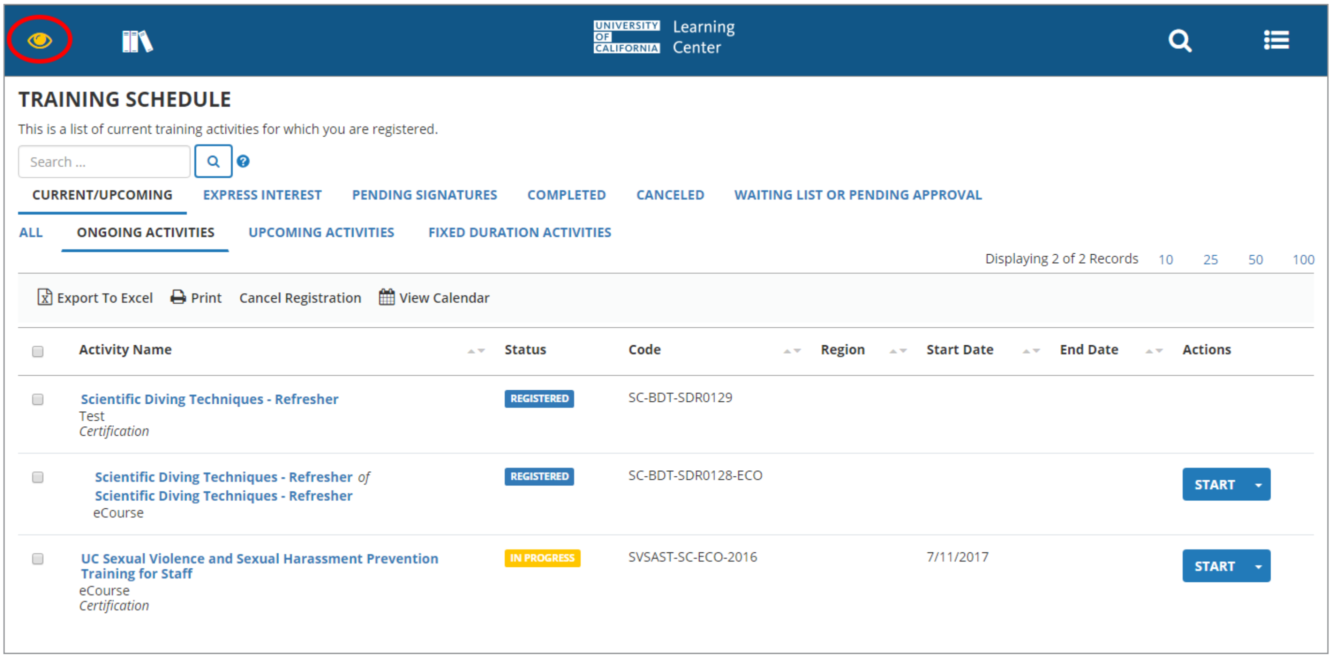
1. Click **Print** (*see "**E**" label on image above*) in the top right corner.
2. Print dialog window appears. Select your normal printer and settings and click **Print**.

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.



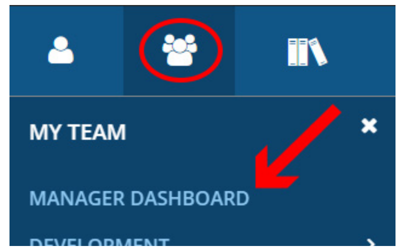


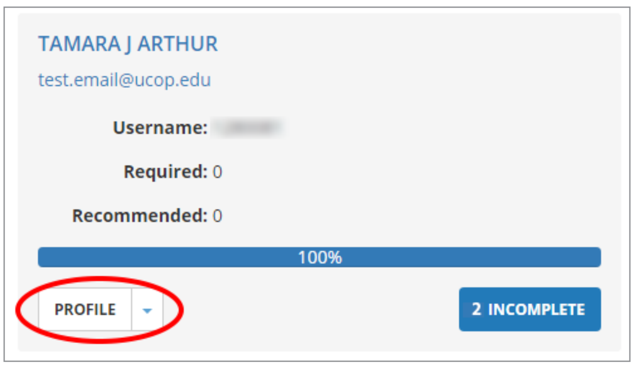
Assign Training to Employees

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)

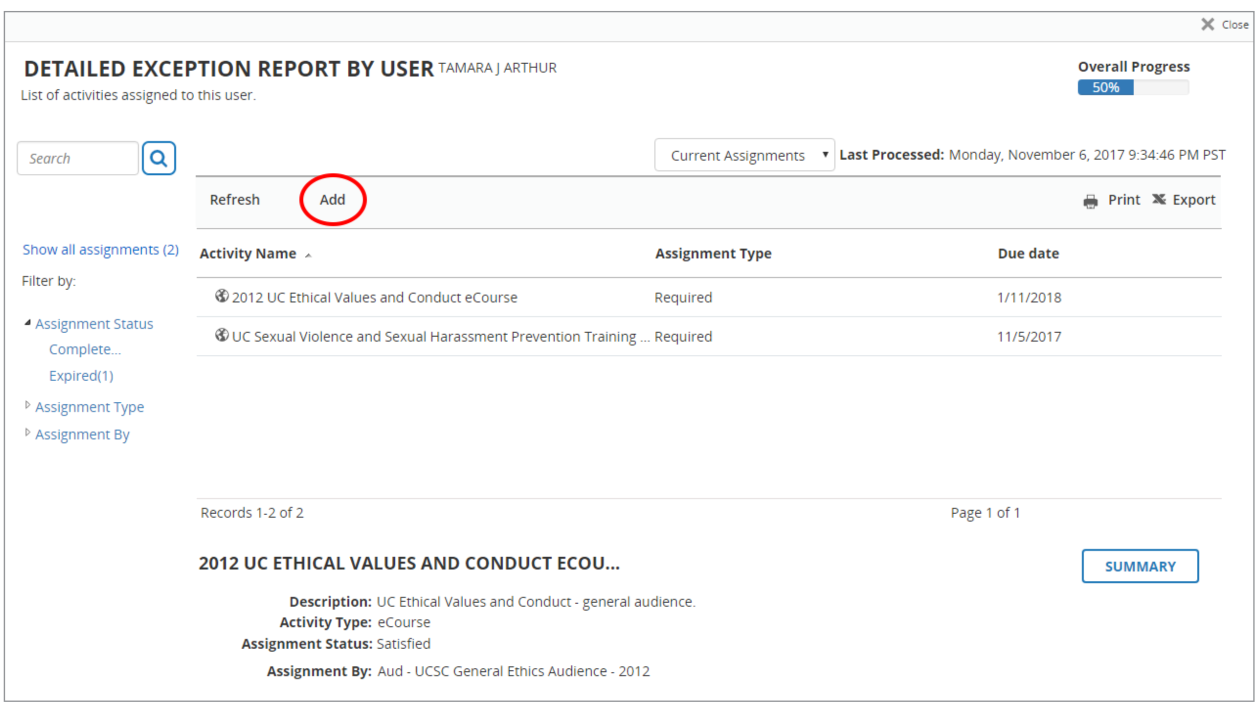
1. In the Header menu **click** on the My Team **icon**
2. Navigate to the **Manager Dashboard**



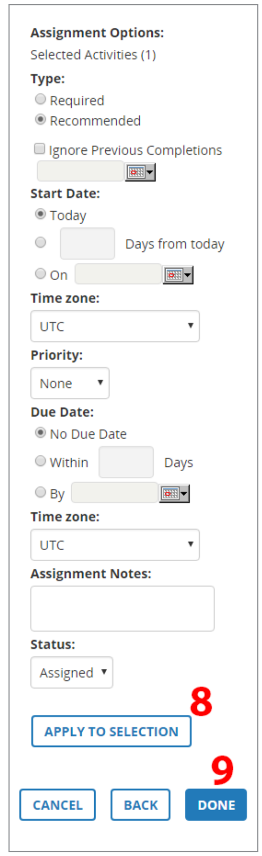


3. Under the employee's name in the Exeption Reports section, click the button that reads either **No Activities Assigned** or **X Incomplete**.

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

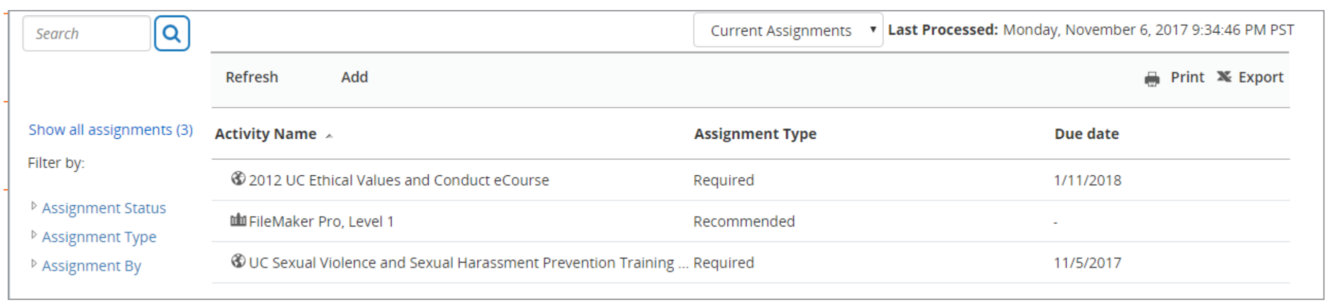


5. **Search** for the desired training activity (activities)
6. **Check** the respective checkbox(es).
7. **Click** the **NEXT** button
8. **Select/Input** any specific criteria for the assignment (e.g.: Required or Recommended, Start Date, Due Date, etc.) and then **click** the **APPLY TO SELECTION**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



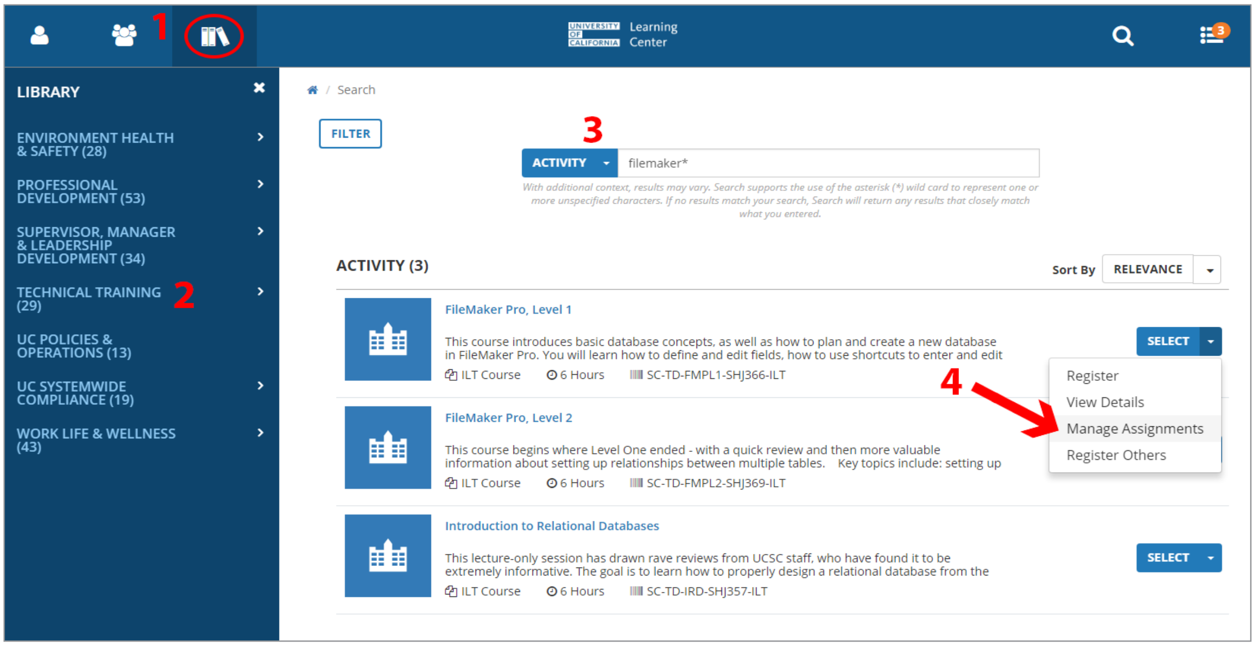
A confirmation message will appear at the top of the screen.

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



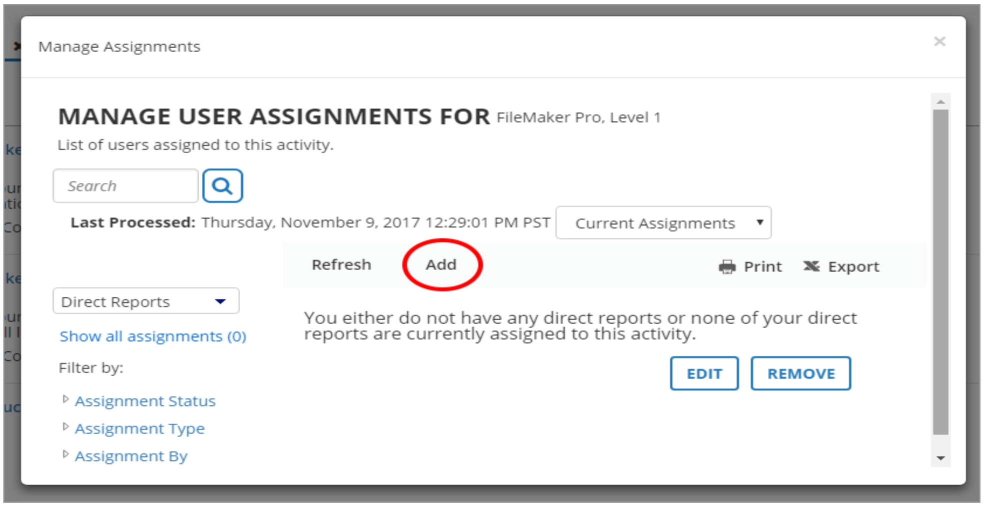
Adding Training Assignments (multiple employees)

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**

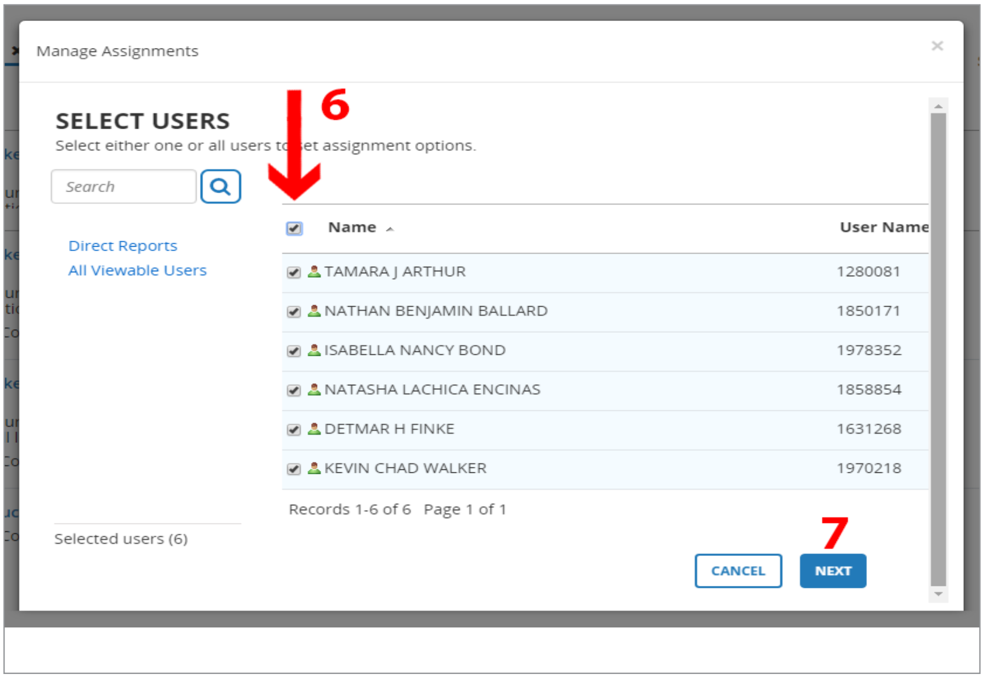


5. In the popup window that appears **click** the **Add** text link

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



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).

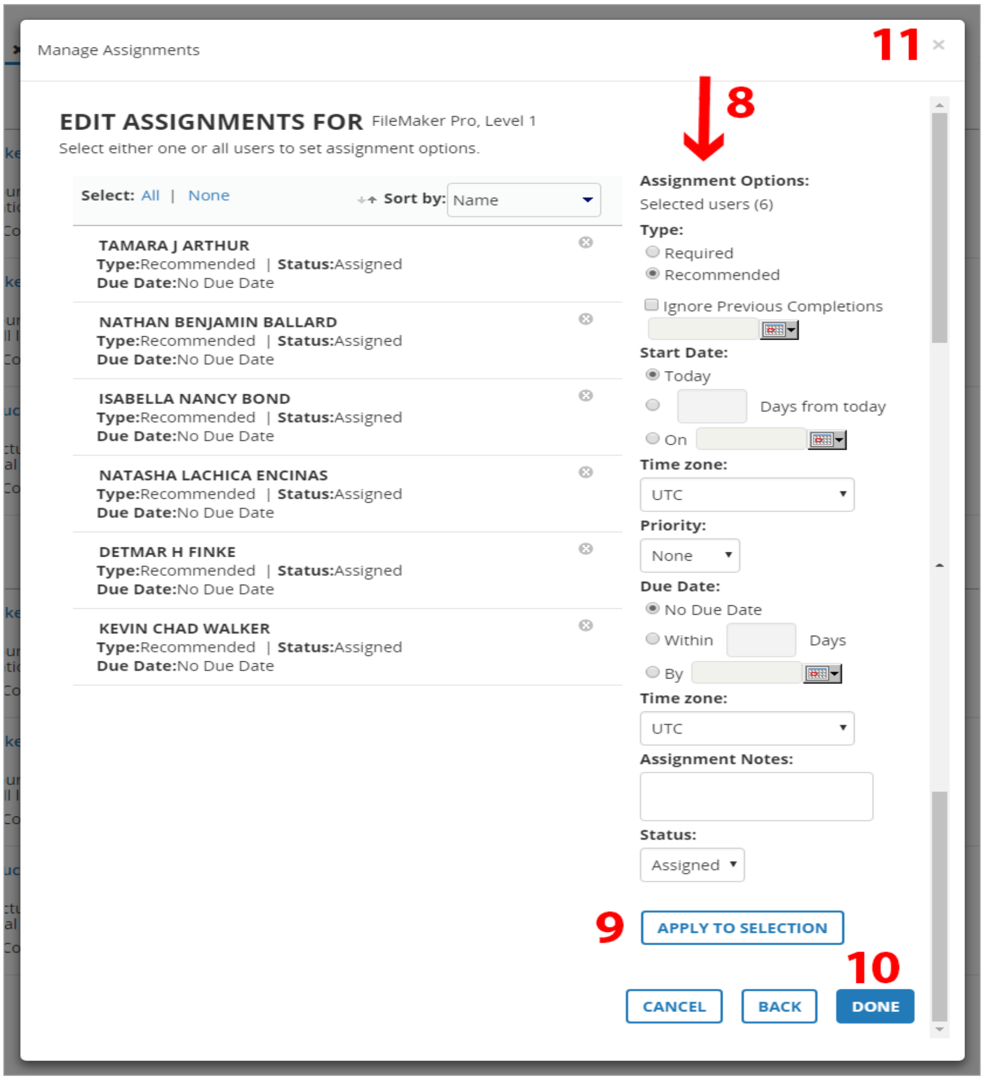


7. **Click** the NEXT button

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

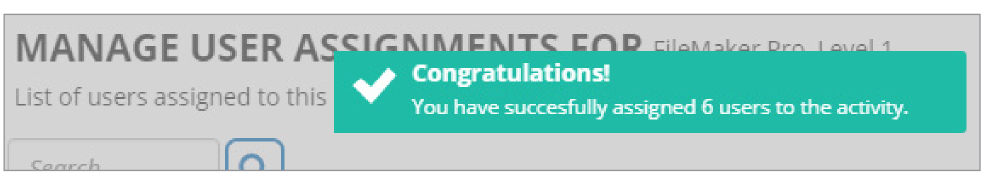
   (*see image on next page*)

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



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

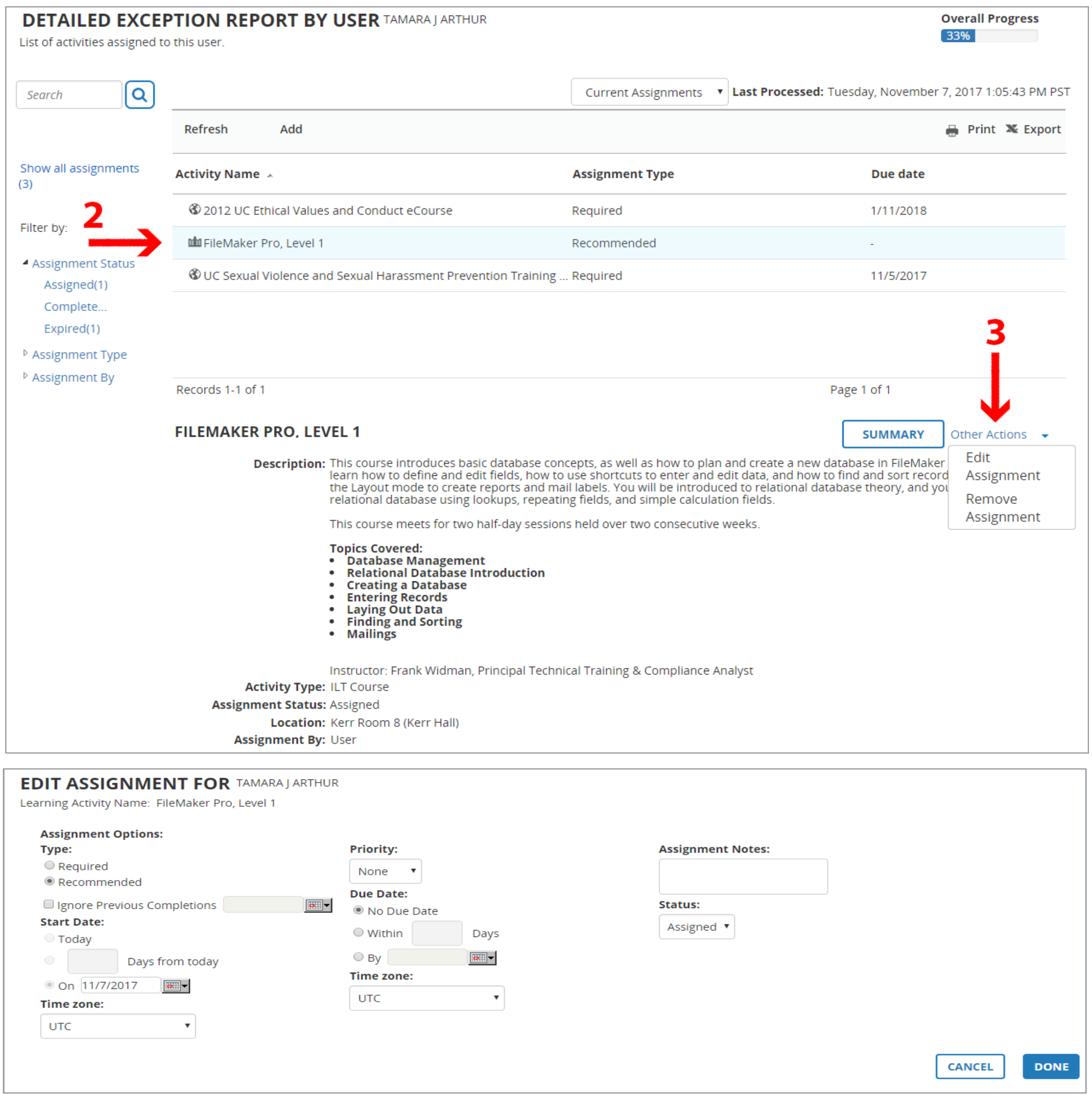
To edit an assigned training activity for your employee...

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



Remove Employee Assignment

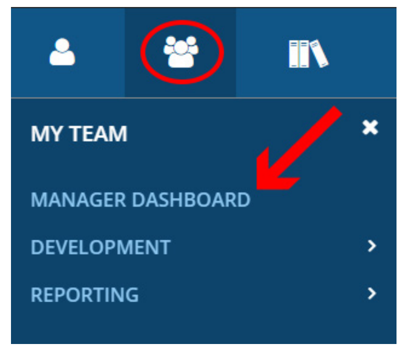
To remove an Employee's assignment goto **Step 3** above and select **Remove Assignment** from the dropdown **Other Actions** menu.

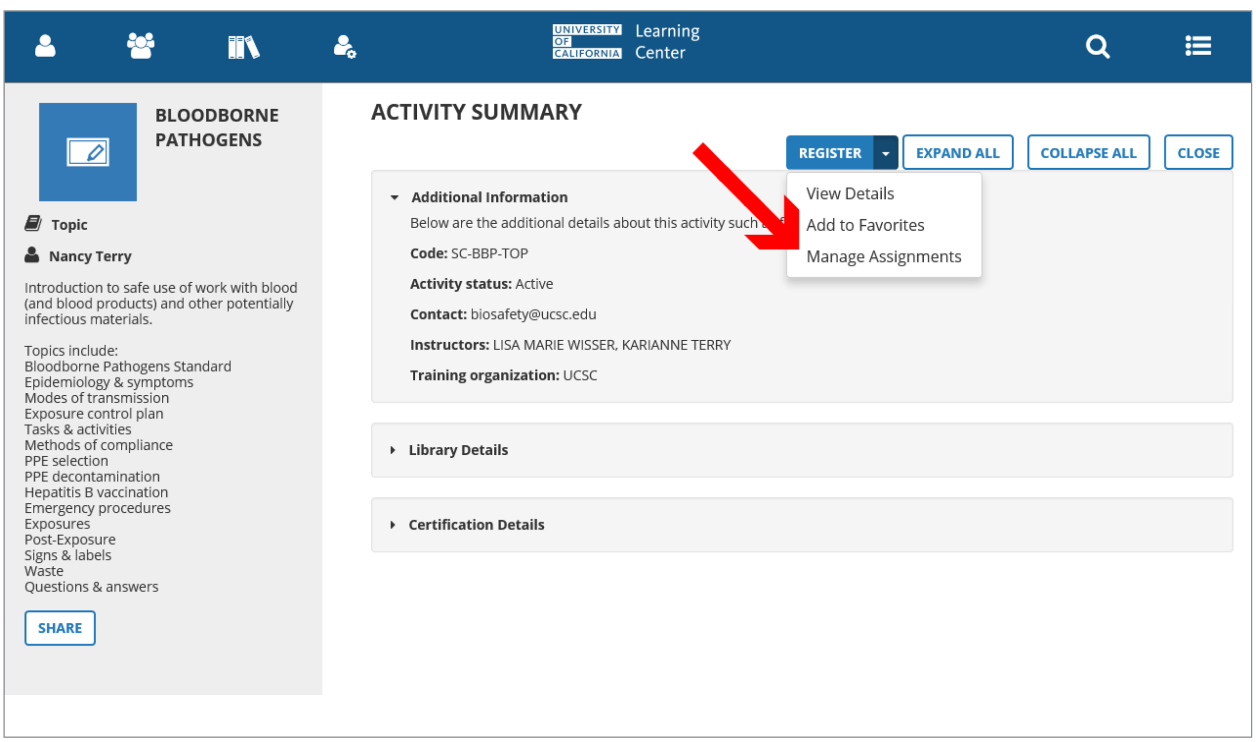
Select **OK** from the Warning! dialog box (or **CANCEL** to exit and not remove the assignment)

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 **Exeption 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





Show All Current Assignments

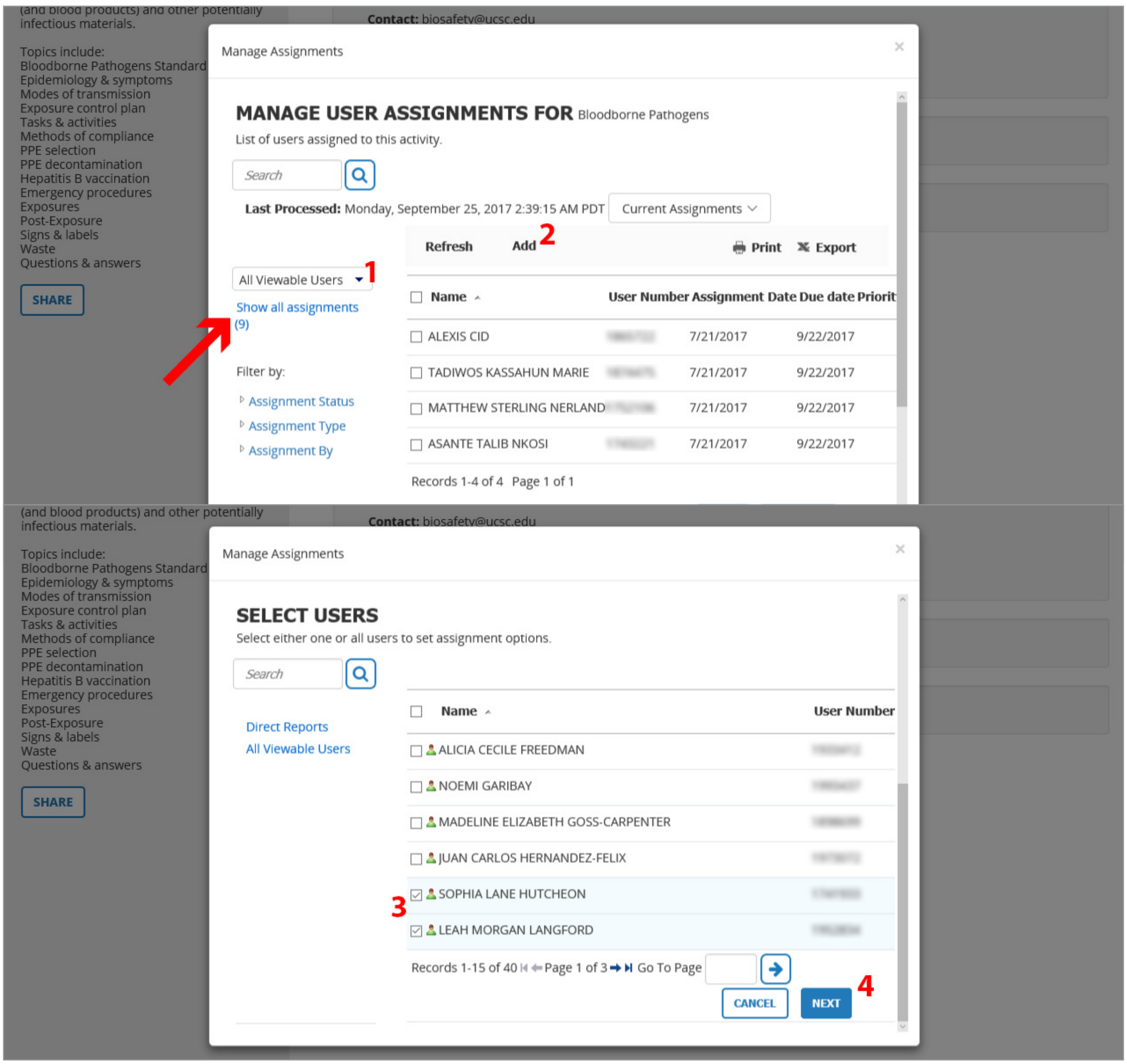
1. **Click** on the **Show all assignments (9)** text link (the number shows how many are assigned). *see image on next page*

   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.



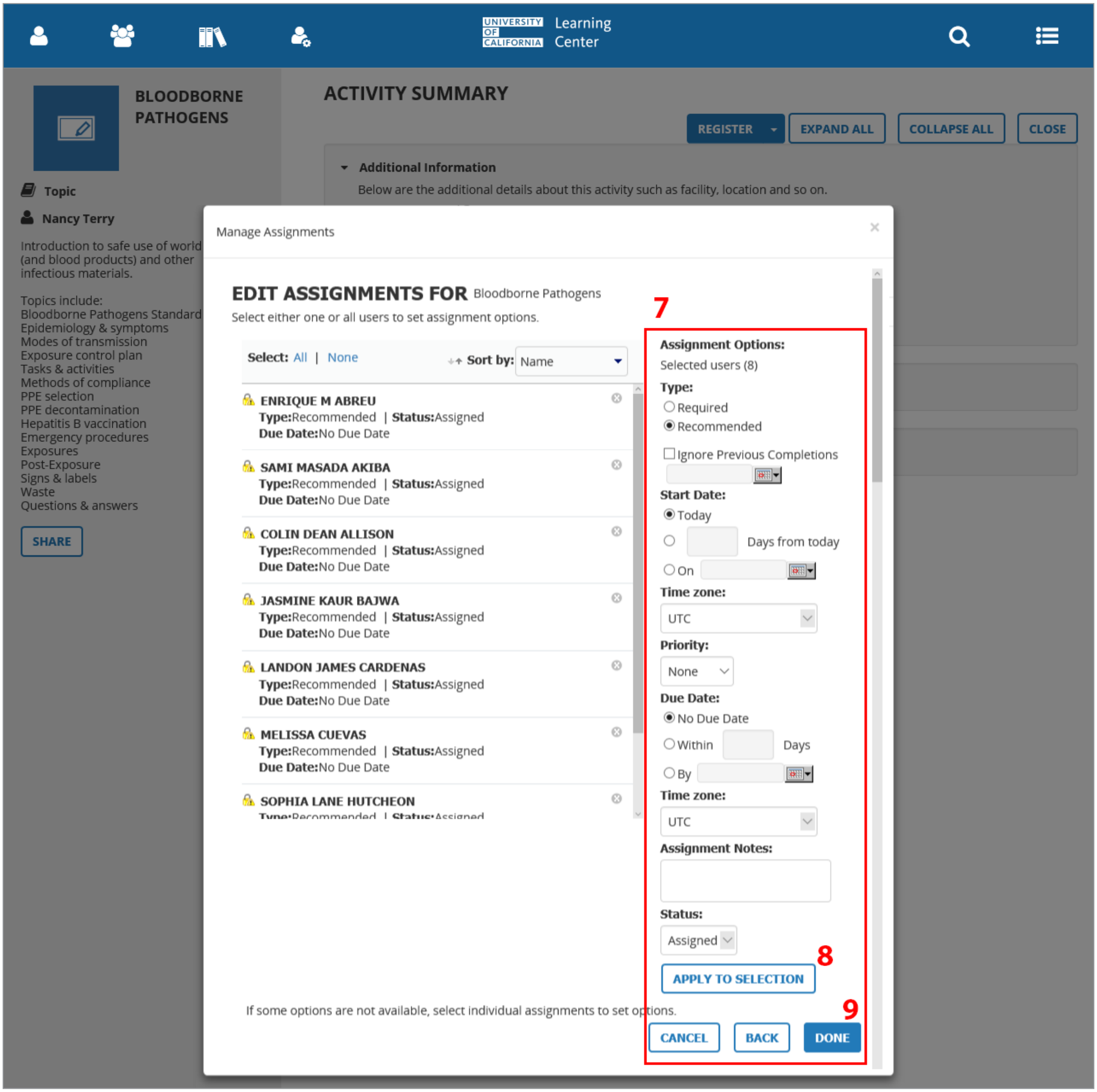
4. Click on the **NEXT** button (4)
5. Select the user(s) that will have the Assignment Options assigned to:
    - Select **ALL** or **click** to select individual user
    - **CTRL click** to select multiple users
6. **Click** the **NEXT** button
7. For the list of selected users, you can then set the 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


UNIVERSITY OF CALIFORNIA Learning Center
BLOODBORNE PATHOGENS
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
ACTIVITY SUMMARY
REGISTER
EXPAND ALL
COLLAPSE ALL
CLOSE
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
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
If some options are not available, select individual assignments to set options.
9
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.

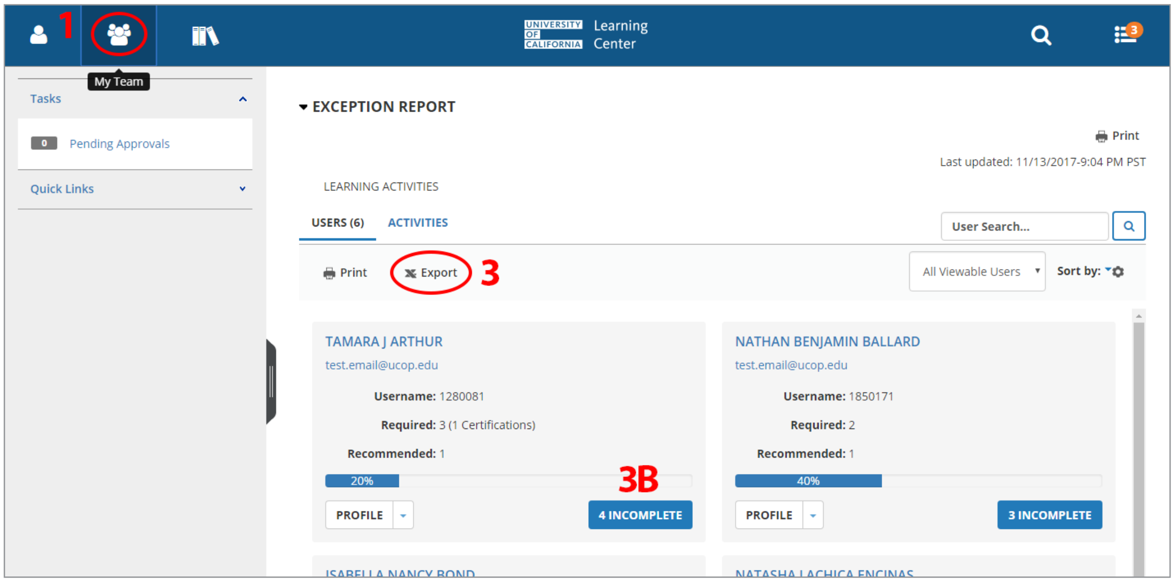
Export Exception Reports

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 activies employees are registered for.*



User Summary Report (all direct reports or viewable users)

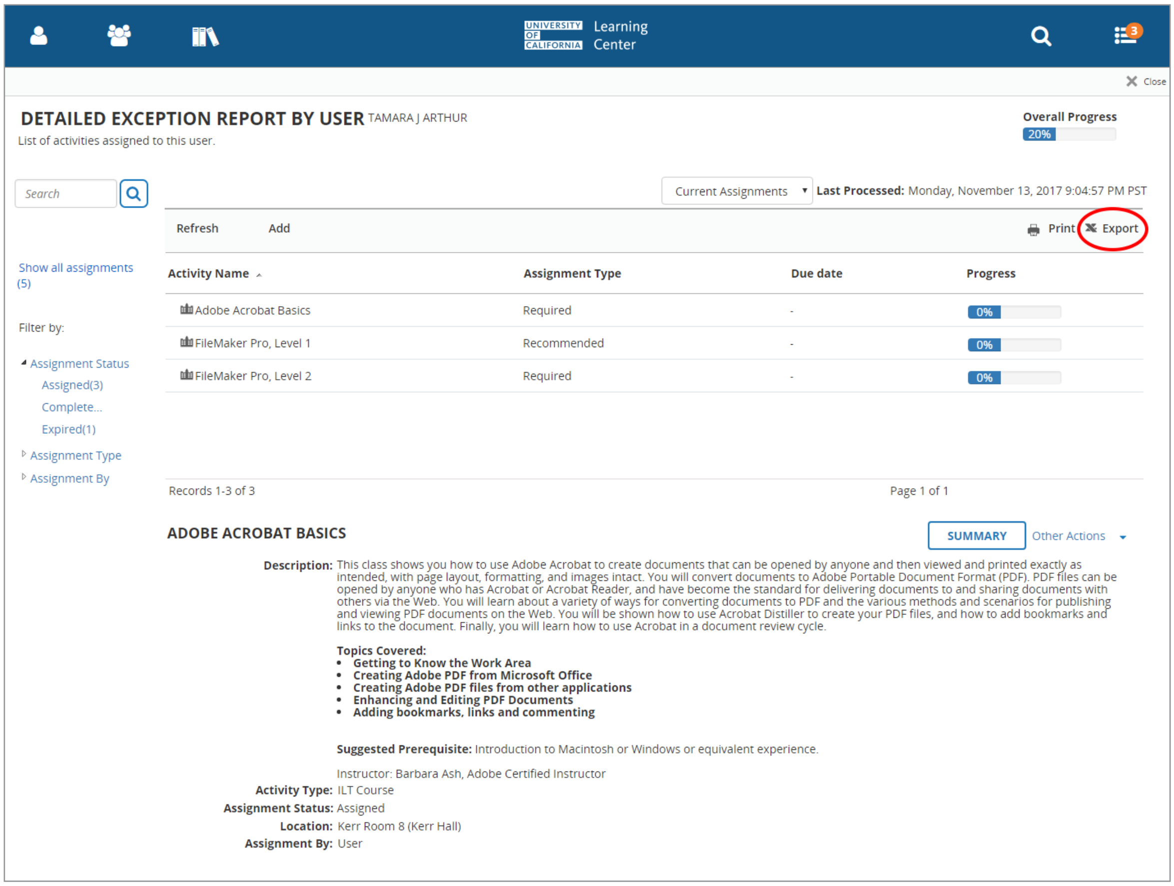
1. In the Header menu, **click** the **MyTeam** icon.
2. Navigate to the **Manager Dashboard**.
3. From the **USERS** Exception Report click **Export** just above the upper left user
4. Select Export settings, click **NEXT**, click on the **File** link, then **OK**. File is downloaded to browser window

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**.

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 User page appears.



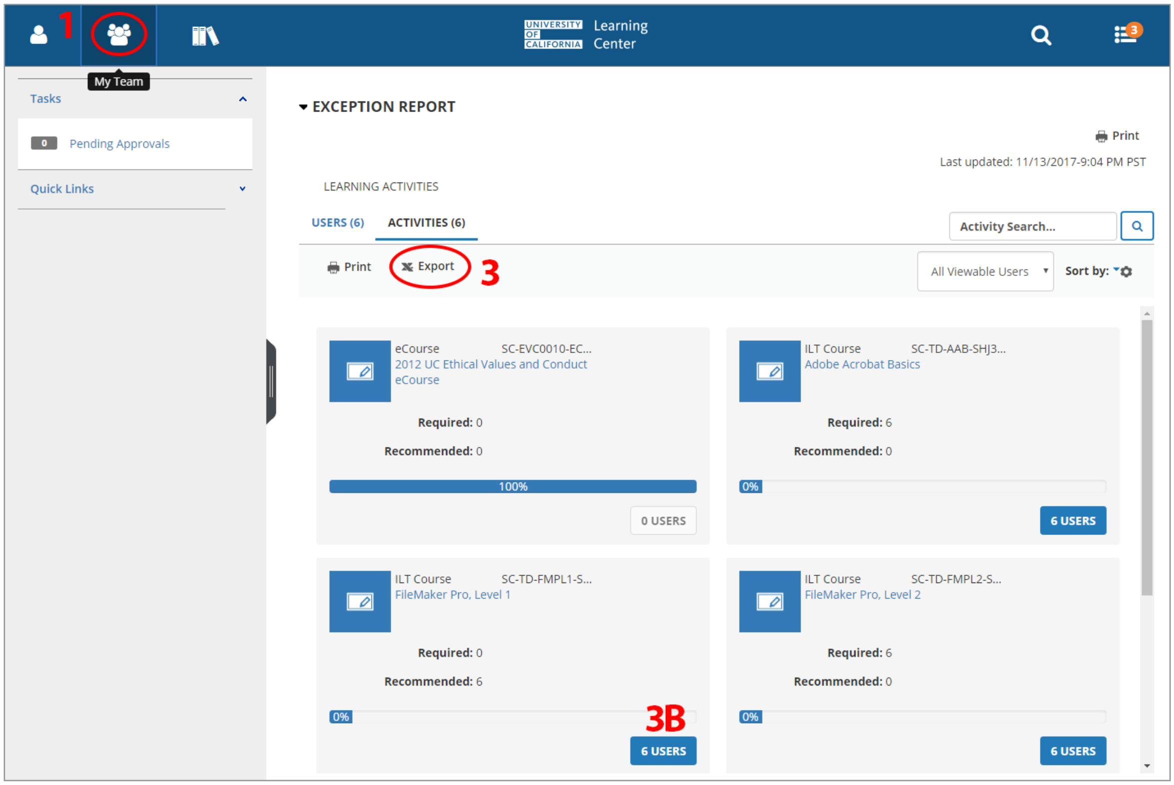
4. Click on the EXPORT link

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

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).



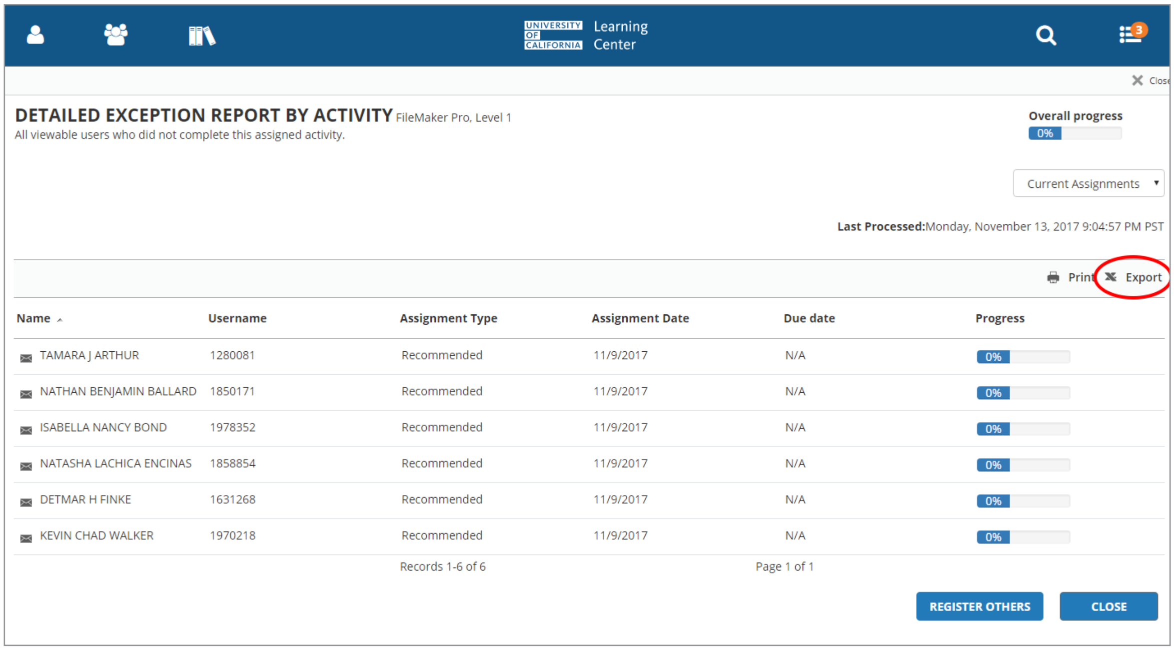
Summary Exception Report by Activity

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.



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

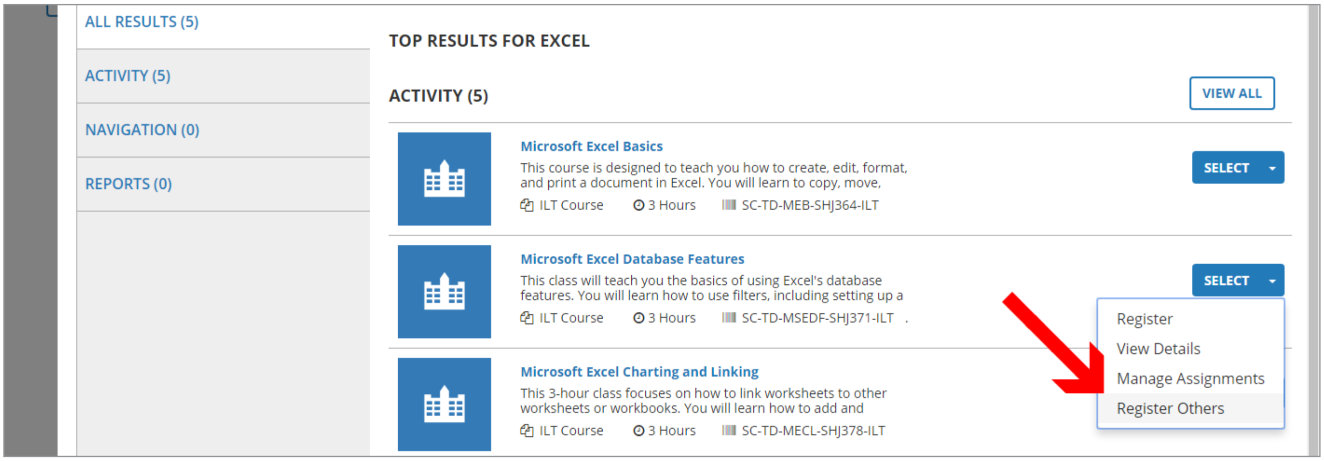
Exception Reports can be printed directly from the UC Learning center by following the above steps for each of the 4 exception report but choose the Print icon link instead of Export. Reports can also be printed from the exported Excel files.

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.

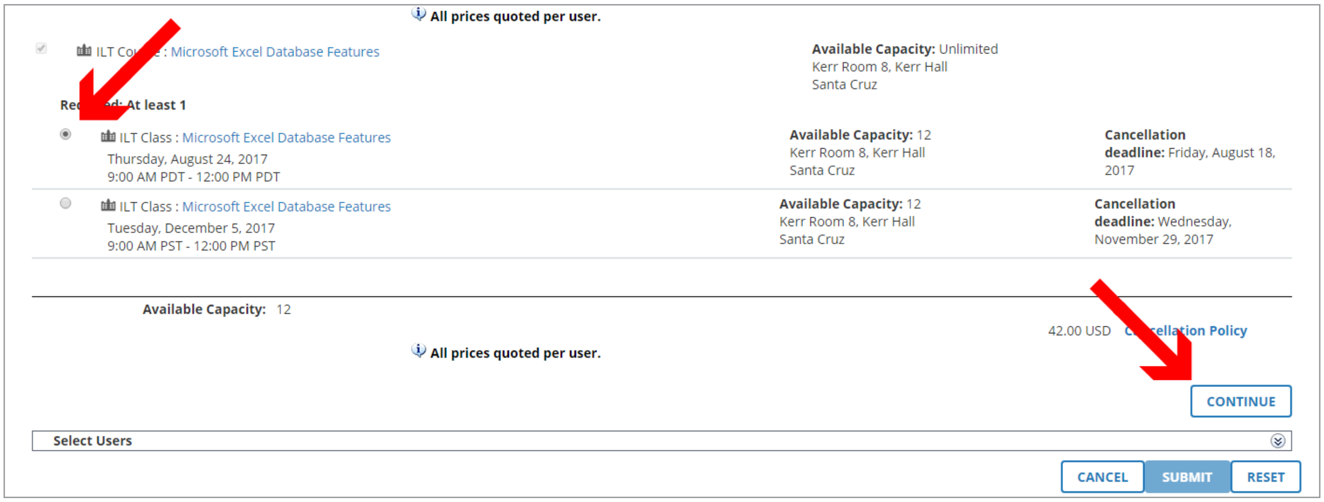
Register managed users:

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**.

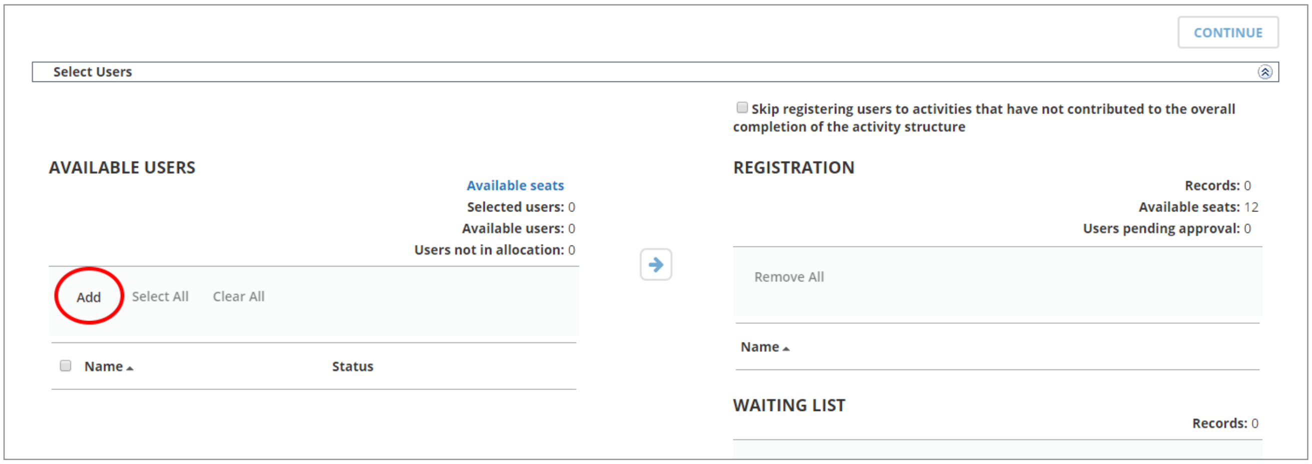


3. **Select** the course or class by clicking the **radio button** then click **CONTINUE** to add users.

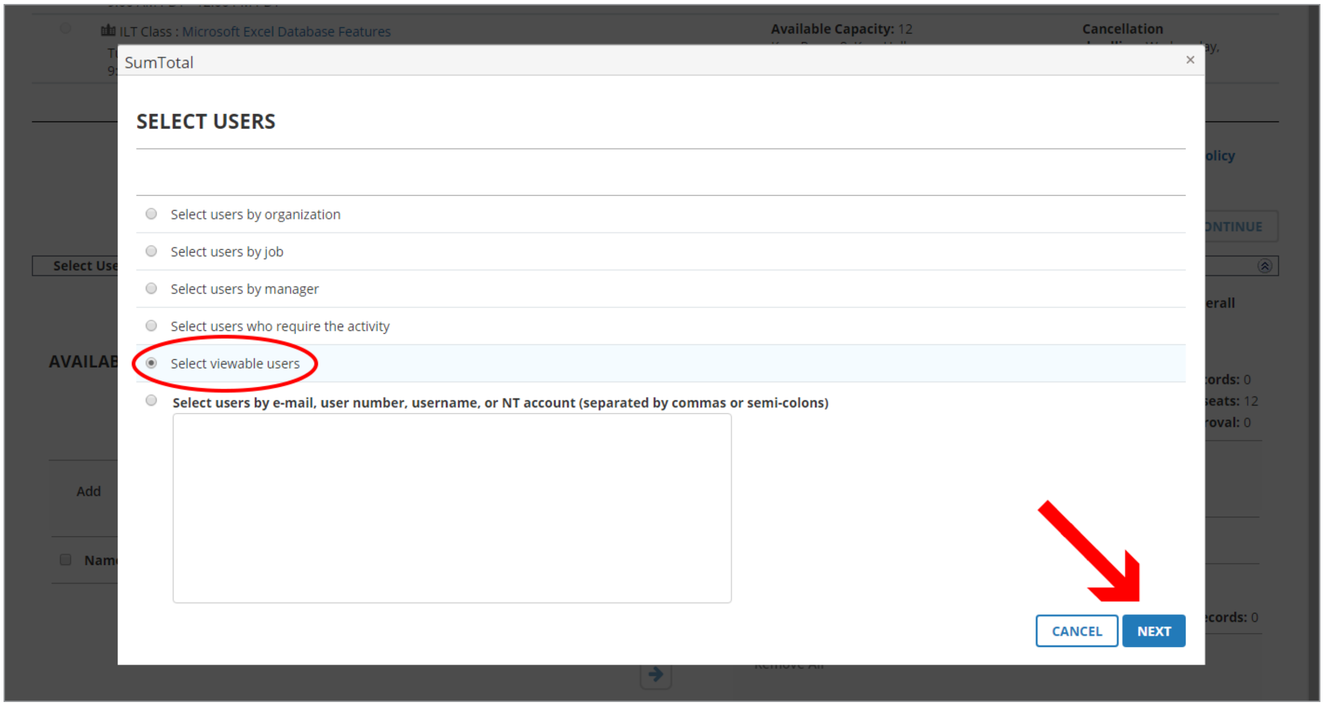
NOTE: *If this is an in-person training you will need to first select the offering by clicking the radio button of the course you wish them to attend before you can click* **Continue***.*



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



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



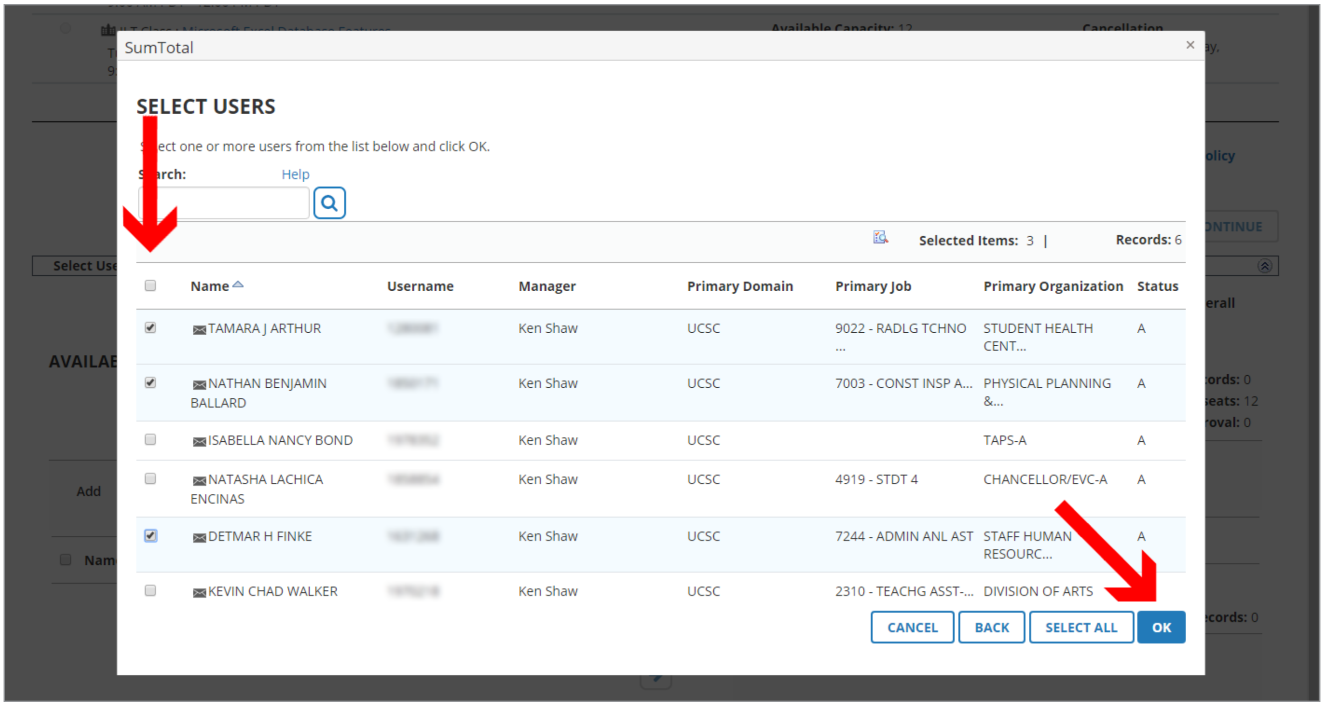
6. Click **Next**. You now have multiple options to:

   a. Type a user's name in the search box and click the **Arrow** button.

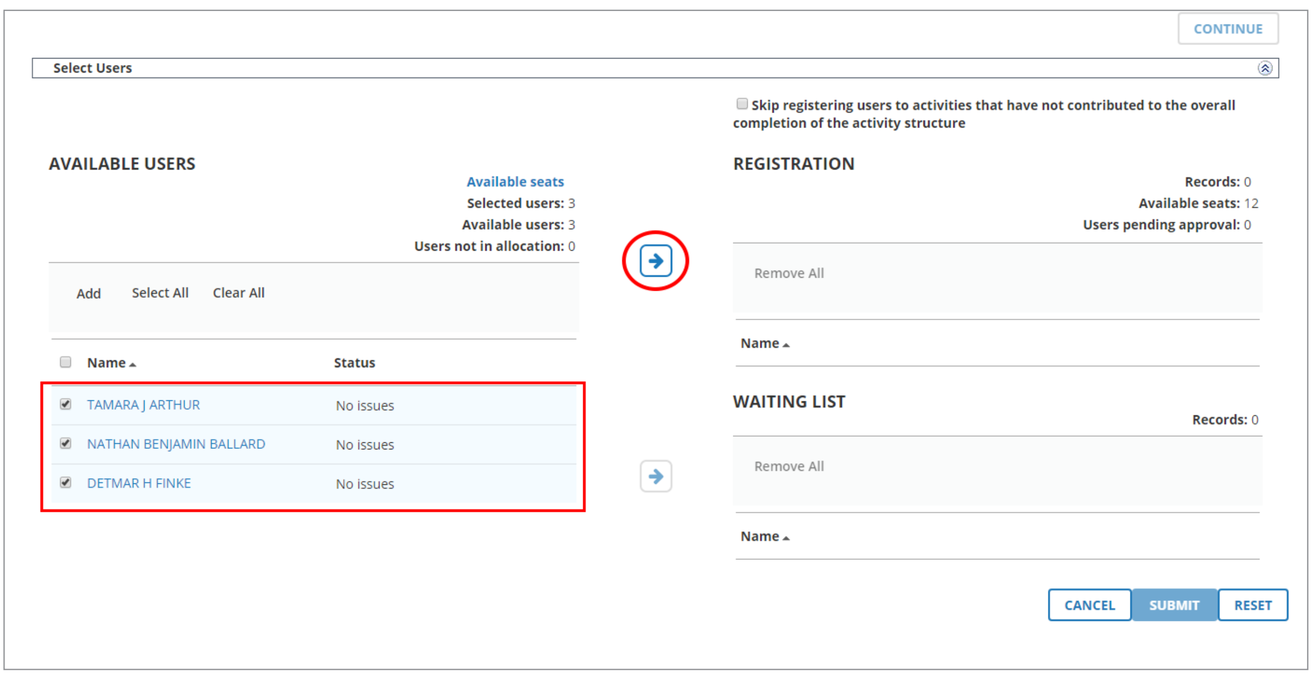
   b. Browse the list of users for individuals you wish to register.

   c. Click **Select All** at the bottom of the page to select all active users or select the top box to select all users on the current page.

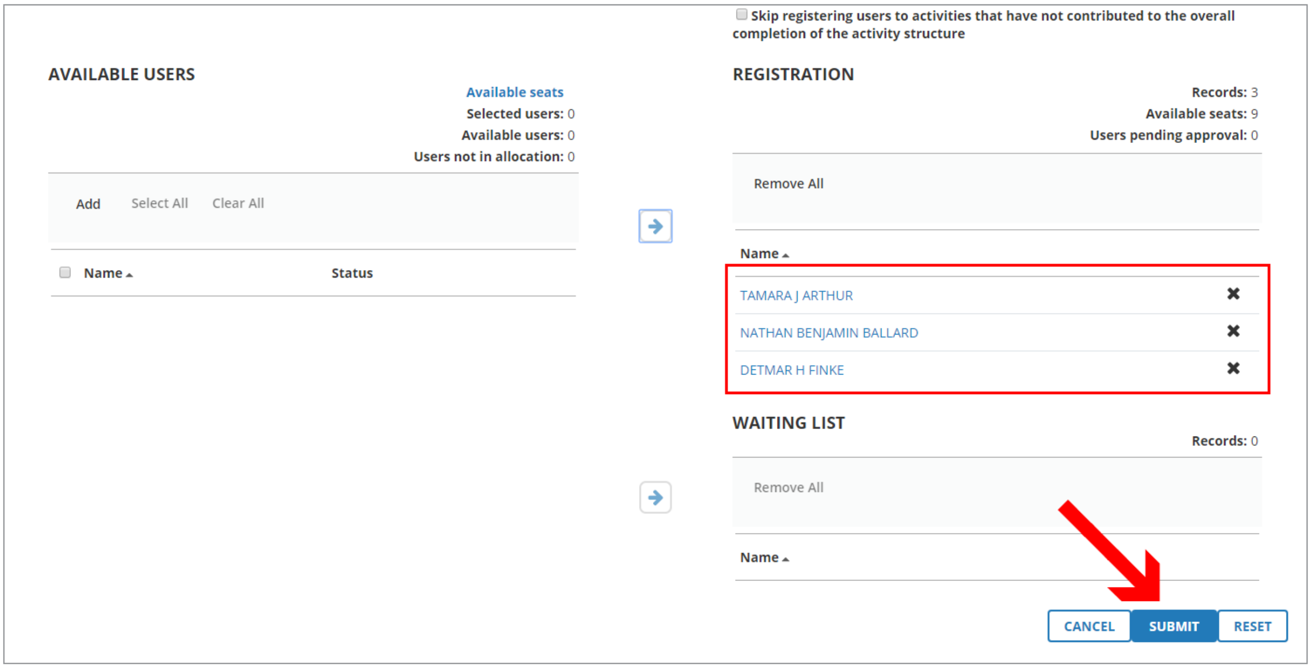
7. **Select** the **check box** next to the users/users name that you wish to register. Click **OK** at the bottom to continue.



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



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



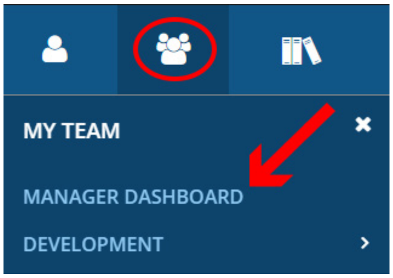
10. The users are now registered for the activity.

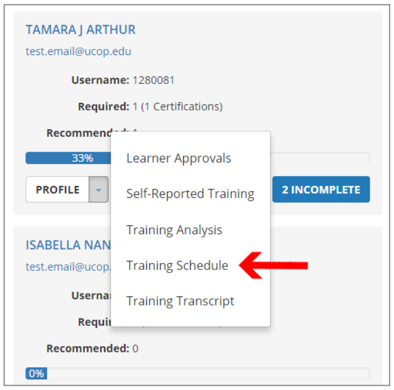
Note:
If the activity is in-person they will receive an email notification of their registration.

If the activity is online there is no registration notification, so you may want to inform them they need to complete the training.

Cancel Employee Registration

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

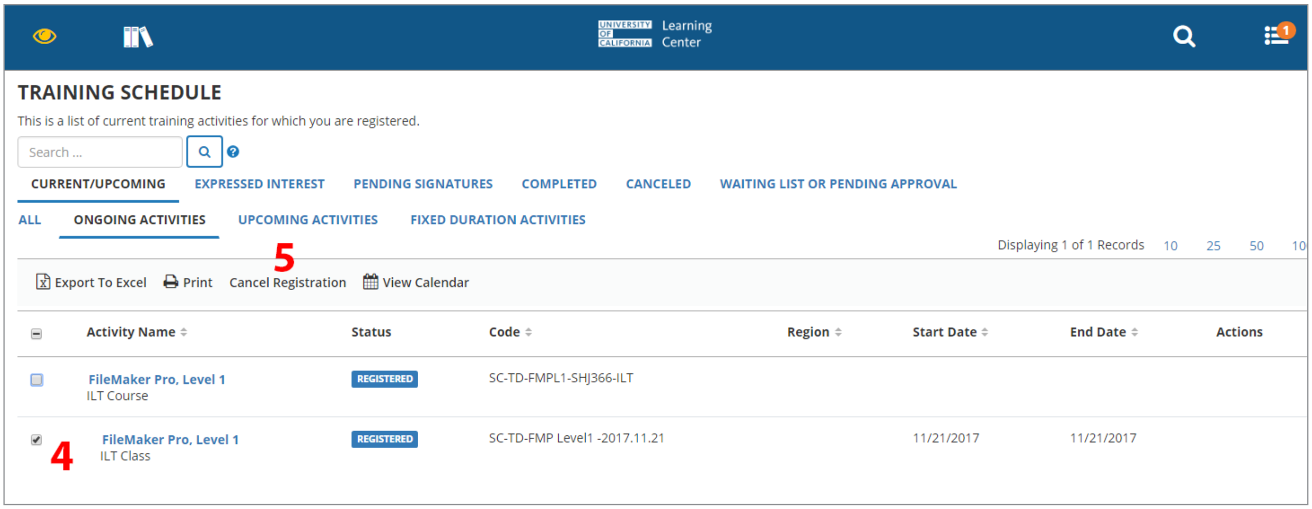




3. **Select** the **Training Schedule** item from the PROFILE dropdown menu of the employee's Exception Report

4. **Check** the **checkbox** beside the desired activity

5. **Click** the **Cancel Registration** text link



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