

LearnUpon Manager Role

User Guide

MANAGER OVERVIEW

Managers are users who can access learner information. This permission allows them to view users' enrollments and run reports.

The term manager in LearnUpon applies to a user who manages a group within the portal. These users have specific permissions associated with the group they manage. The manager user type is not inherently linked to management roles within your organization.

Groups represent a set of related users within your organization, such as a team or a department. Groups in LearnUpon let you manage the training for large numbers of learners effectively.

Manager permissions apply to learners **within** the manager's groups only. The permissions do not apply outside the group. Managers can't browse other groups, or view individual learners' data.

MANAGER PERMISSIONS

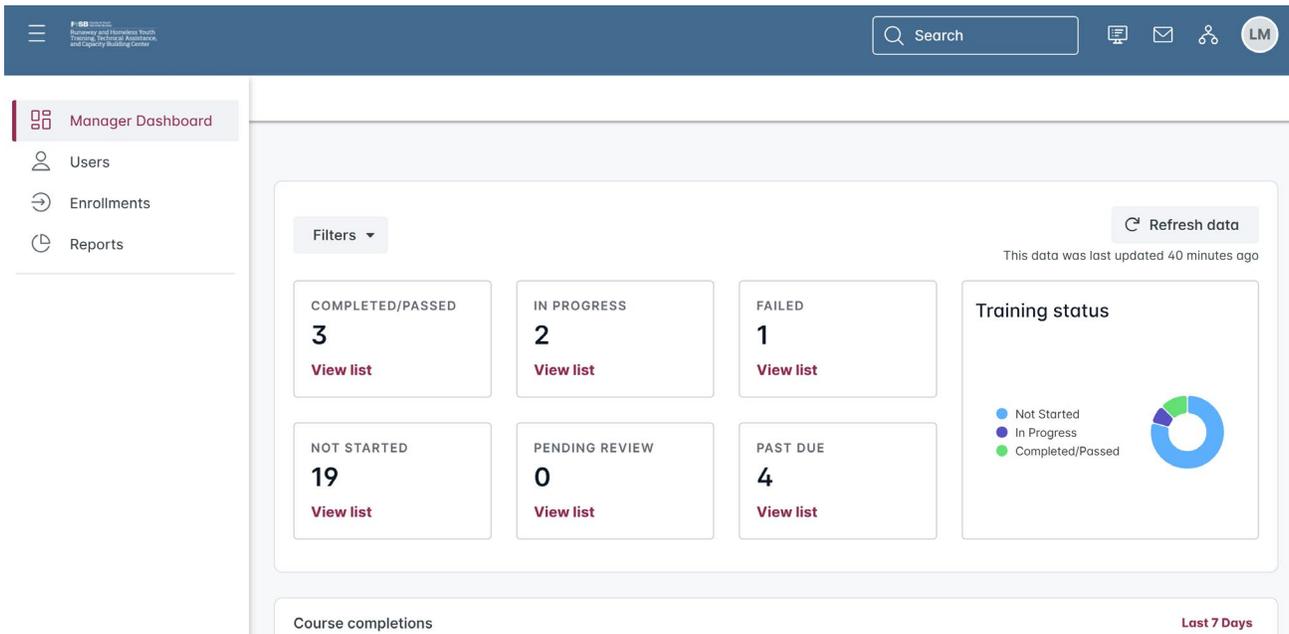
By default, managers can access several features available from learners' user profile, aka their Info page. From the user profile, managers can:

- Invite or create users within their groups
- Move users between groups they manage
- Change a learner's name or email address
- Disable or enable a learner's login access
- Approve or reject enrollment requests from users in their groups
- Set or reset a learner's password
- Set or reset the learner account's expiry date
- Add or update any editable custom user data fields
- Enroll or unenroll users in their groups from courses and learning paths
- Manually mark their learners' enrollments as complete
- Reset exam attempts for learners they manage
- Run reports on their assigned users' training programs including data regarding course and learning path enrollment status

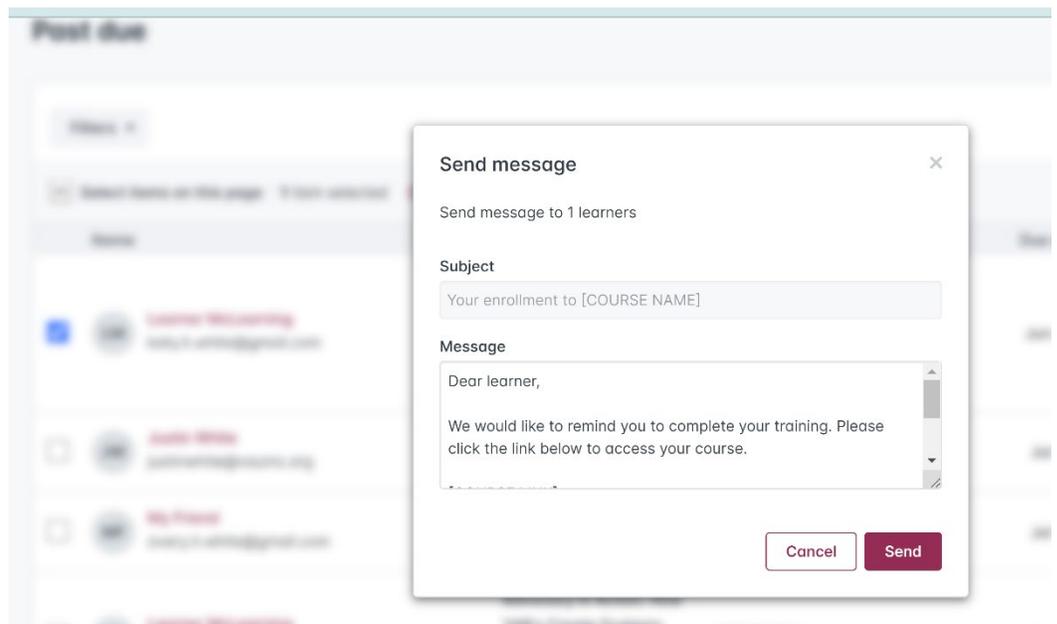
- Export a list of their managed users to Excel

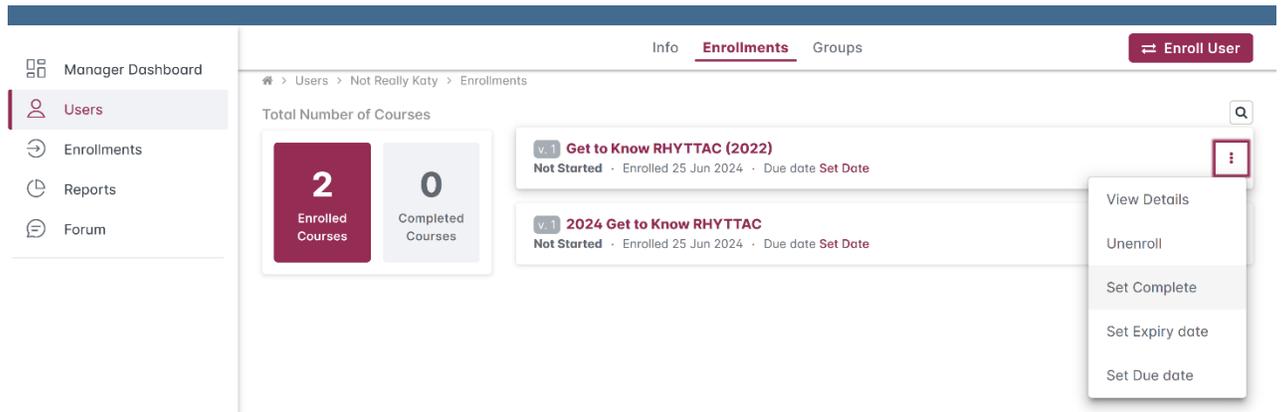
MANAGER DASHBOARD

The manager dashboard gives you quick access to the numbers that matter most about learner enrollments. Cards, charts and graphs show users with manager permissions the current status of learners, with options to filter by course or group.



The manager can click on each of these sections to gain more information about users and to communicate via email with users about that course. This can be particularly helpful for communicating with users who are past due on a particular course.





USERS

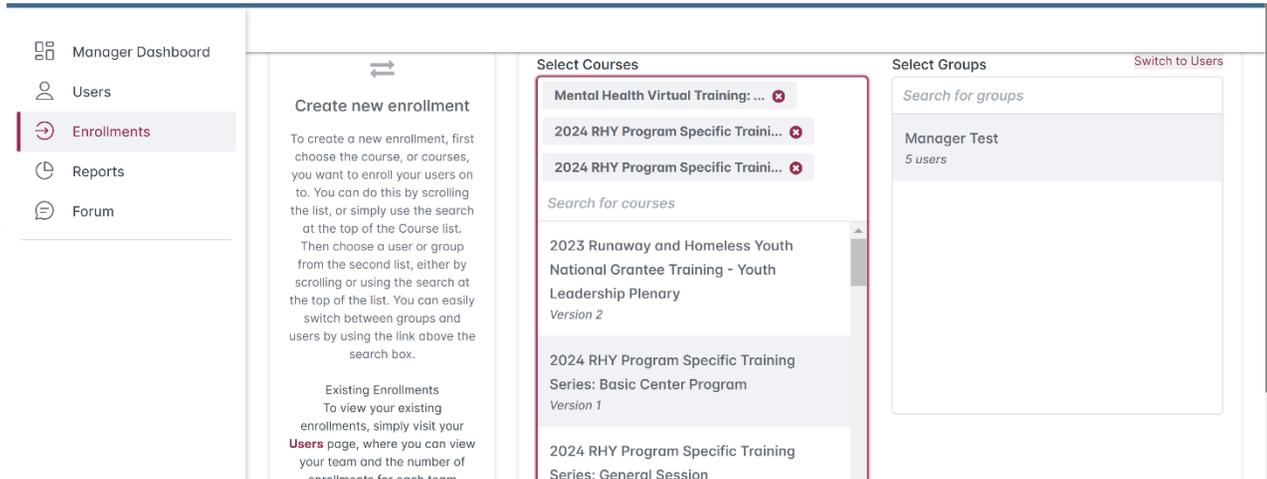
To track the progress of an individual user. Click on individual user profile and then click on Enrollments. From this page you can view enrolled and completed courses. Additionally, you can click the 3 dots by a course to:

- **View course details.** This lets you know exactly where in the course their progress may be and when they last entered the course.
- **Unenroll.** This unenrolls the user from the assigned course. This can be helpful if they need to complete the same course multiple times. Their training history will remember each enrollment and completion.
- **Set Complete.** If a user completed the course and it's not showing up...or if the user completed the course externally.
- **Set Expiry date.** After the Expiry date, a user will no longer be able to access the course. *This is not recommended.*
- **Set Due date.** This sets a timeline for completion and can notify users as the due date is upcoming or passed.

ENROLLMENTS

To set up enrollments, first develop an external list of all the course titles so you can copy and paste the course titles all at once so that you can select courses quickly and then Switch to

Groups to select all Users in your group for enrollment. If necessary, you can also enroll individual Users who may need a specific course, or when onboarding a new staff member.



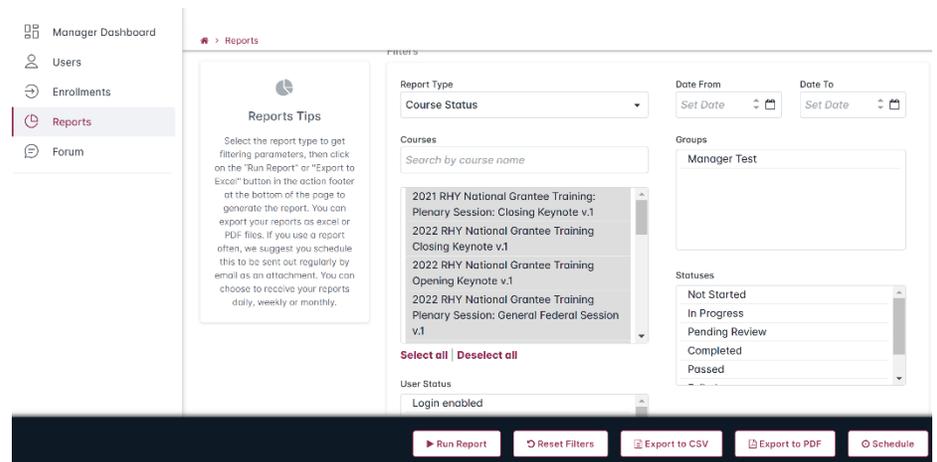
As part of creating new enrollments, managers also have the option to:

- **Re-enroll completed users.** This means that you can re-enroll users who have completed any of the courses you have listed for this new enrollment.
- **Set Due date.** This will set course specific due dates for selected groups.

NAVIGATING REPORTS

Reports tab allows you to view and export a summary of Learner progress. There are two reports that will provide most of the information you need. Both reports can be viewed and manipulated online and downloaded as a CSV file or a PDF.

Course status. This report provides overview of all learners and progress. This report is best viewed when downloaded. To create this report, Select all Courses (using Select all button). You can leave all other filters blank in order to get the fullest data.



From this report, you can email Users with reminders to complete a particular course (using the envelope icon) or set a new due date for the course (using the clock icon). For each course, you can select all users or individual users using the check box next to their name.

<input checked="" type="checkbox"/>	Name	Email	Enrolled	Started	Completed	Score	Status
<input checked="" type="checkbox"/>	Learner McLearning	katy.h.white@gmail.com	06/25/2024	06/25/2024	06/25/2024	-	Completed
<input checked="" type="checkbox"/>	Not Really Katy	katyblue23@comcast.net	06/25/2024	-	-	-	Not Started
<input checked="" type="checkbox"/>	Lara Test	griffin.lara@gmail.com	06/25/2024	-	-	-	Not Started
<input checked="" type="checkbox"/>	Justin White	justinwhite@vaumc.org	07/30/2024	-	-	-	Not Started
<input checked="" type="checkbox"/>	My Friend	avery.h.white@gmail.com	07/30/2024	-	-	-	Not Started

Course History—This shows dates of courses taken by individual users. This can be a quick way to view a user’s progress or can be exported as a PDF and saved to their staff files to track their training history.

Reports Tips

Select the report type to get filtering parameters, then click on the "Run Report" or "Export to Excel" button in the action footer at the bottom of the page to generate the report. You can export your reports as excel or PDF files. If you use a report often, we suggest you schedule this to be sent out regularly by email as an attachment. You can choose to receive your reports daily, weekly or monthly.

Report Type: **Course History**

Date From: Date To:

User:

Statuses:

1 Not Started | 0 In Progress | 1 Completed | 0 Passed | 0 Failed | 0 Pending Review | 1 Past Due

[Run Report](#) [Reset Filters](#) [Export to CSV](#) [Export to PDF](#)