RUNAWAY and Homeless Youth Training, Technical Assistance, and Capacity Building Center

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
 mange
- 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.

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Filters -			
Thors			C ^a Refresh data This data was last updated 40 minutes ago
COMPLETED/PASSED 3 View list	IN PROGRESS 2 View list	FAILED 1 View list	Training status
NOT STARTED	PENDING REVIEW	PAST DUE	Not Started In Progress Completed/Passed
View list	View list	View list	
	COMPLETED/PASSED 3 View list NOT STARTED 19 View list	COMPLETED/PASSED IN PROGRESS 3 2 View list View list NOT STARTED PENDING REVIEW 19 0 View list View list	COMPLETED/PASSED IN PROGRESS FAILED 3 2 1 View list View list View list NOT STARTED PENDING REVIEW PAST DUE 19 0 4 View list View list View list

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.

	\Rightarrow	Select Courses	Select Groups	Switch to Users		
)_ Users	Create new enrollment	Mental Health Virtual Training: 😢	Search for groups			
) Enrollments	To create a new enrollment, first	2024 RHY Program Specific Traini 😮	Manager Test			
Reports	choose the course, or courses, you want to enroll your users on	2024 RHY Program Specific Traini 😮	5 users			
Forum	to. You can do this by scrolling the list, or simply use the search	Search for courses				
	at the top of the Course list. Then choose a user or group from the second list, either by scrolling or using the search at the top of the list. You can easily switch between groups and users by using the link above the search box. Existing Enrollments To view your existing	2023 Runaway and Homeless Youth National Grantee Training - Youth Leadership Plenary <i>Version 2</i>				
		2024 RHY Program Specific Training Series: Basic Center Program Version 1				
Users page, where you can view your team and the number of	2024 RHY Program Specific Training Series: General Session					

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

Manager Dashboard	♣ > Reports							
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Enrollments	¢	Report Type	Date From Date To					
(Reports	Reports Tips	Course Status	• Set Date 🗘 🗂 Set Date 🗘 🗂					
	Select the report type to get	Courses	Groups					
E) Forum	filtering parameters, then click on the "Run Report" or "Export to	Search by course name	Manager Test					
	at the bottom of the page to generate the report. You can	2021 RHY National Grantee Training: Plenary Session: Closing Keynote v.1	A					
	export your reports as excel or PDF files. If you use a report often, we suggest you schedule	2022 RHY National Grantee Training Closing Keynote v.1						
	this to be sent out regularly by email as an attachment. You can	2022 RHY National Grantee Training Opening Keynote v.1	Statuses					
	choose to receive your reports daily, weekly or monthly.	2022 RHY National Grantee Training	Not Started					
		Plenary Session: General Federal Session	In Progress					
		v.1	 Pending Review 					
		Select all Deselect all	Completed					
		Lisor Status	Passed					
		Login angled						
		Login enabled						
		► Run Report "D Reset Filters	Export to CSV					

Select all button). You can leave all other filters blank in order to get the fullest data.

From this report,	24 Ge	et to Know RHYTT	AC v.1				i	s 0	
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reminders to		Learner McLearning	katy.h.white@gmail .com	06/25/20 24	06/25/20 24	06/25/20 24	-	Complet ed	
complete a particular course	~	Not Really Katy	katyblue23@comc ast.net	06/25/20 24	-	-	-	Not Started	1
(using the		Lara Test	griffin.lara@gmail.c om	06/25/20 24	-	-	-	Not Started	
envelope icon) or		Justin White	justinwhite@vaumc .org	07/30/2 024	-	-	-	Not Started	
set a new due date for the		My Friend	avery.h.white@gm ail.com	07/30/2 024	-	-	-	Not Started	

course (using the clock icon). For each course, you can select all users or individual users using the check box next to their name.

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.

Manager Dashboard		Filters						
 Users Enrollments Reports Forum 	C Reports Tips Select the report type to get frame parameters that he did on the 'Run Report' or 'Export to sen the bottom of the soge to generate the report. You can be so the port to be so the port flags. If you use a report often, we suggest you schedule	Report Type Course History • User Search by firstname, lastname, email			Set	From Date Caller Ca	Date To Set Date	÷ 🛙
	this to be sent out regularly by email as an attachment. You can choose to receive your reports daily, weekly or monthly.	1 Not Started	0 In Progress	1 Completed	0 Passed	0 Failed	O Ponding Review	1 Past Due