

'How to' guide for the Manager using UoRLearn



View my team's learning

Assign learning to an individual or all of my team

Approve/Reject learning requests

Cancel learning that I have assigned to my team

Request learning for your team

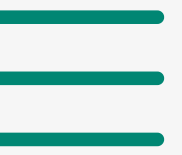
Learning Request Dashboard

Download a report on an individual or my team

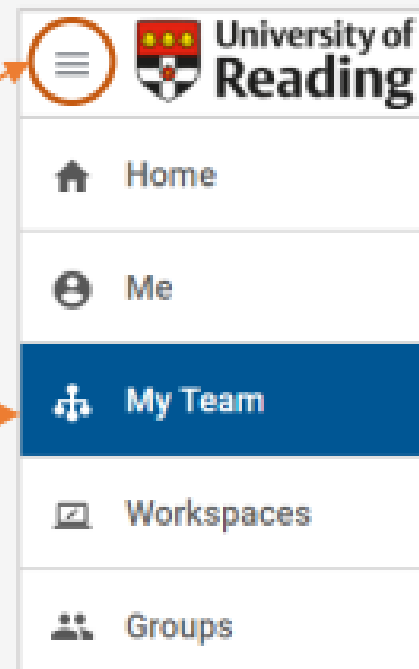
Schedule a virtual meeting

View 'My Team' on my mobile

View my team's learning



- 1 Access from the home page by clicking on the 'Burger menu' > 'My Team'

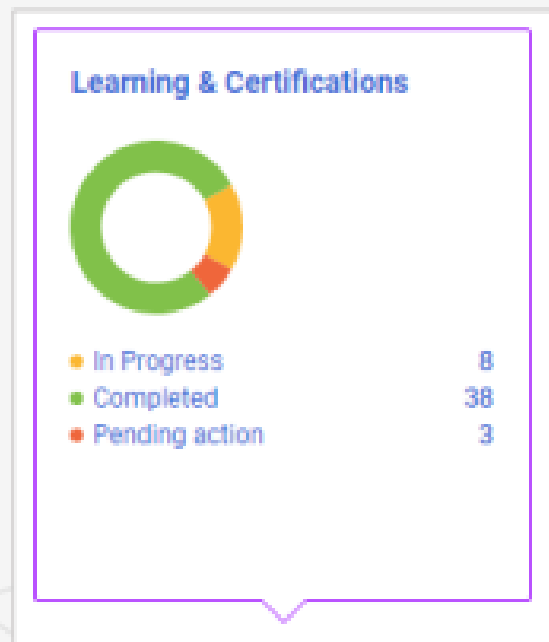


- 2 In 'My Team' – (Direct Team) click on each name to view the learning someone has booked on to.

NAME	UPCOMING	OVERDUE	APPROVAL	ACTIONS
Apple Pip (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London : 3:12 PM	1	0	2	ACTIONS

Hint: If you have more than one team select the drop down arrow next to 'Direct Team' to view the 'Alternate Team'.

- 3 The results of their learning will appear below:



NAME	PROGRESS	DUE	ACTIONS
Coaching Skills for Academic Tutors Course Version:1.0 Blended Location: Whiteknights Campus Start date: 28/03/2019 Source : Apple Pip	IN PROGRESS	29/05/2019 33 days remaining	VIEW SUMMARY
Introduction to Project Management Course Version:1.0 Instructor-Led Location: Whiteknights Campus Start date: 25/06/2019	REGISTERED	25/06/2019 60 days remaining	VIEW SUMMARY

Assign learning to an individual or all of my team



1 On the 'Direct Team' page, (top right- hand side), select 'Assign learning'

TEAM ACTIONS

Meet from My Room

Assign Learning

Request Learning

2 Click on 'Register' and go through each step using the **NEXT** button.

Register

Add to plan

Assign & Enrol

Register for one or more classes now

3 To select the learning, put a keyword in the search. Find the course, click on 'Select class' and click on 'Action' to make the selection.

Select Learning

AVAILABLE LEARNING

Search catalogue: feedback

TITLE	DELIVERY TYPE	CLASS	SEATS	ACTION
Feedback Skills	Web-Based	Select class	-	

4 There is an option to make the learning 'Mandatory' and you can either 'Add all' of your team or search for an individual and click the 'Action' button to select.

Select People

PEOPLE

Direct team Alternative team

Search for people:

NAME	MANAGER	MANDATORY	ACTION
Apple Pip (MICHTEST2) Department of Indefinite studies	Apple Blossom	NO YES	

5 Review your selections and click on the 'Register' button.

ASSIGN LEARNING

Review your Selections



TITLE	SELECTED PEOPLE
Feedback Skills	1 Edit

REGISTER



Approve/Reject learning requests



1 Some courses will require a manager's approval. In these circumstances you will receive an email notification with a link to the UoRLearn platform to 'approve' or 'reject' the request for learning.

NAME	UPCOMING	OVERDUE	APPROVAL	
 Apple Pip  (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London : 3:12 PM <small>Offline Go to v</small>	1	0	2	ACTIONS v


List of Pending Approval Items

-  **accident investigation part 2**
Externally completed course REVIEW
-  **Effective manager**
Externally completed course
how to manage REVIEW

2 Select the 'Approval' number to view the learning. Click on the 'Review' button.

3 Select 'Reject' or 'Approve' as required.

VIEW

Course name **accident investigation part 2** 

ID 00004482

Description

Status Pending Approval Delivery type Instructor-Led

Class End Date 11/04/2019

No attachment associated.

CANCEL REJECT APPROVE

 Hint: 'Upcoming' = learning within the next 7 days

Request Learning for your Team



1

TEAM ACTIONS

- Meet from My Room
- Assign Learning
- Request Learning**

You can make a 'request for learning' for courses listed in the catalogue that you would like your team or a member of your team to attend. Go to **'My Team' > 'Team Actions'** (list on the right hand side of the screen > **'Request Learning'**).

2

Proceed through each of the steps by searching for and selecting learning.

REQUEST LEARNING

1 2 3 Select Course

AVAILABLE COURSES

Search catalogue:

TITLE	ACTION
INTRODUCTION TO EXAM FEEDBACK	<input type="button" value="SELECT"/>
Introduction to Project Managem ...	<input type="button" value="SELECT"/>

REQUEST DETAILS

Coaching

Requested Start on/after:

Requested End on/before:

Delivery type:

Location:

Facility:

Notes:

Make the appropriate selections regarding the session and select **'next'** to choose who you are requesting the learning for.

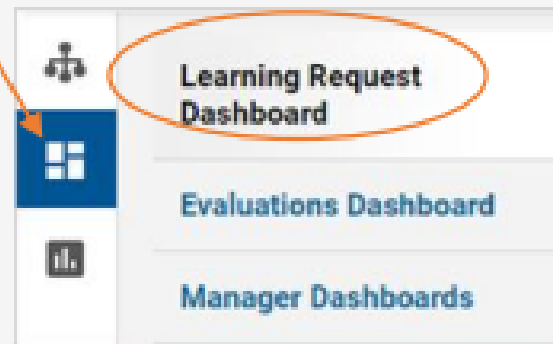
Please note that learners have the ability to 'request learning' themselves through the Catalogue.

Hint: Scroll the bar to the right hand side to reveal further detail.

Learning Request Dashboard



- 1 To access this dashboard from the 'Burger menu' click 'My Team' > Dashboards > Learning Request Dashboard.



- 2 The Learning Request Dashboard allows managers to view all learning requests that they have privileges to view, which include:

- Requests that they create for their direct and alternate reports.
- Requests submitted by their direct and alternate reports.

- 3 Managers can search for the required class request by using the search criteria and filters on this page. They can only edit or cancel requests that *they* have placed on behalf of their team members; however, they cannot edit or cancel requests placed by the team members themselves.

COURSE	LEARNER	CREATED BY	BATCH ID	DELIVERY TYPE	REQUESTED START DATE	REQUESTED END DATE	LOCATION	STATUS	ACTIONS
INDIVIDUAL VOICE	NX909335	Michelle	2262	Virtual Cl...	22/05/2019	31/05/2019		Pending	EDIT

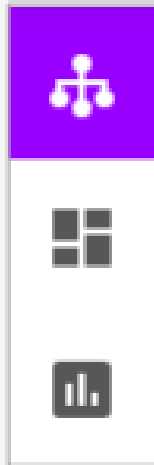
- 4 **Class request statuses**

Status	Description
<i>Pending</i>	A class request is in <i>Pending</i> state till class creation.
<i>Accepted</i>	A class request moves to the <i>Accepted</i> state when the learning administrator registers the learner to an existing or new class against the class request.
<i>Rejected</i>	A class request moves to the <i>Rejected</i> state when the learning administrator rejects the request.
<i>Class created</i>	A class request moves to the <i>Class created</i> state when a learning administrator creates a new class against the request.

Cancel learning that I have assigned







1



Access from the home page by clicking on the 'Burger menu' > 'My Team'





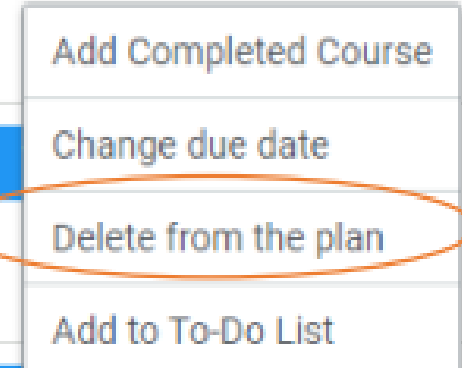




2

Click on the name of the person you assigned the learning to.

NAME	UPCOMING	OVERDUE	APPROVAL	
 Apple Pip  (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London : 10:30 AM <input type="radio"/> Offline Go to 	2	0	1	ACTIONS 

3

Go to 'Actions' next to the course you wish to remove and 'Delete from the plan'.

Learning & Certifications  Filters 				
NAME	PROGRESS	DUE	ACTIONS	
 Customer Service Course Version:1.0 Source : Apple Blossom	PENDING REGISTRATION	29/05/2019 7 days remaining	VIEW CLASSES 	 <ul style="list-style-type: none">Add Completed CourseChange due dateDelete from the planAdd to To-Do List
 Coaching Course Version:1.0 Instructor-Led Location: Whiteknights Campus Start date: 31/03/2019	IN PROGRESS	30/09/2019 131 days remaining	VIEW CLASSES 	
 Accident Incident Investigation	IN PROGRESS		VIEW CLASSES 	

Complete an evaluation for a member of my team



1

On occasion there may be a request sent by email to you to complete an evaluation on whether there has been a significant impact of a piece of learning on a member of your team.

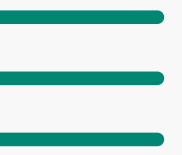
You will also find any requests within the 'Evaluations Dashboard'. Just click on the 'Launch' button within 'Actions' and complete the survey.

The screenshot shows the 'Evaluations Dashboard' interface. On the left, there is a sidebar with three menu items: 'Learning Request Dashboard', 'Evaluations Dashboard' (highlighted in purple), and 'Manager Dashboards'. The main content area displays a table with the following data:

EVALUATION NAME	COURSE	LEARNER	AVAILABLE DATE	EXPIRY DATE	ACTIONS
Evaluation	Introduction to Project Management Class ID:00003501	Joanna Bagniewska	20/05/2019	27/05/2019	LAUNCH

Showing all 1 evaluations.

Download a report on an individual of my team



Name	Last Run Date	Actions
Manager Learning Dashboard	24/04/2019 1:59 PM	Schedule
My Team Enrolment Dashboard	24/04/2019 1:59 PM	Schedule

1

From the 'Burger menu' > 'My Team' > 'Analytics' > 'Reports'

2

You can either click on the report title to automatically generate the report within the webpage or 'Schedule' > 'Add New Schedule' to be emailed to you or others in an excel format within a time frame you choose.

Team Status Overview

Schedule Filters

Frequency*: Select one

Report format*: PDF

Recipient type: Email Person

E-mail address:

Add a few recipients.

Subject: Your *report_name* report is ready.

Body:
Your requested report has been created and is attached to this email. If you have any problems viewing the report or any questions, please contact us.

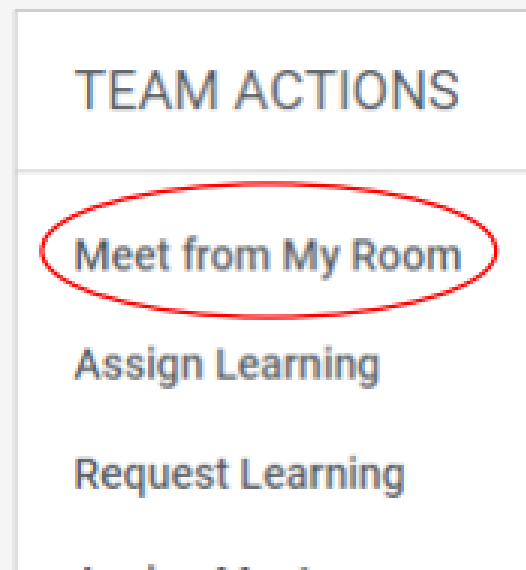
CANCEL SAVE

Schedule a virtual meeting



1

In 'My Team' (Direct Team) select '**Meet from My Room**' in the '**Team Actions**' list on the right hand side of the screen.



2

Add the meeting topic and description and click on '**Meet Now**'

Meet from My Room

Meeting Topic*

Meet now!

Meeting Description

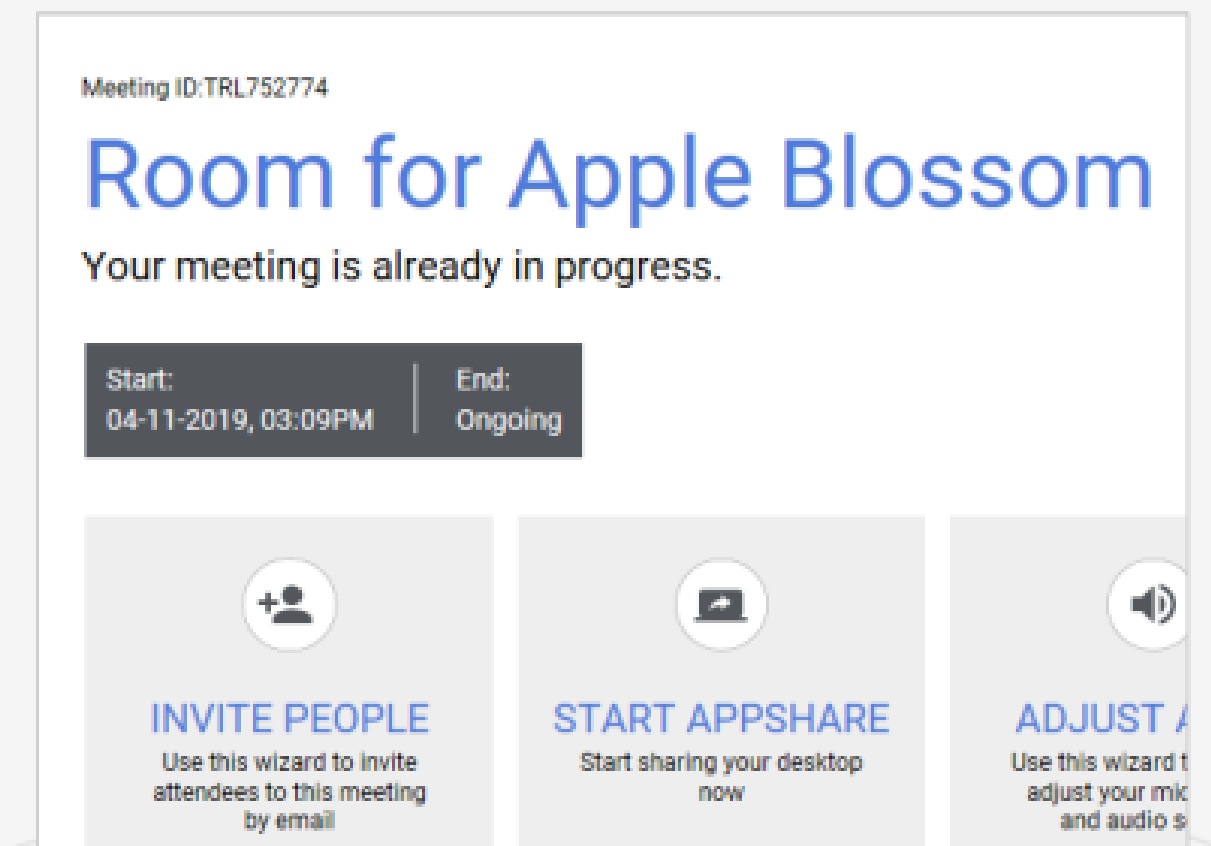
Dear team, I would like us to get together online to discuss our strategy for this year!

Remaining character count: 912

CANCEL MEET NOW

3

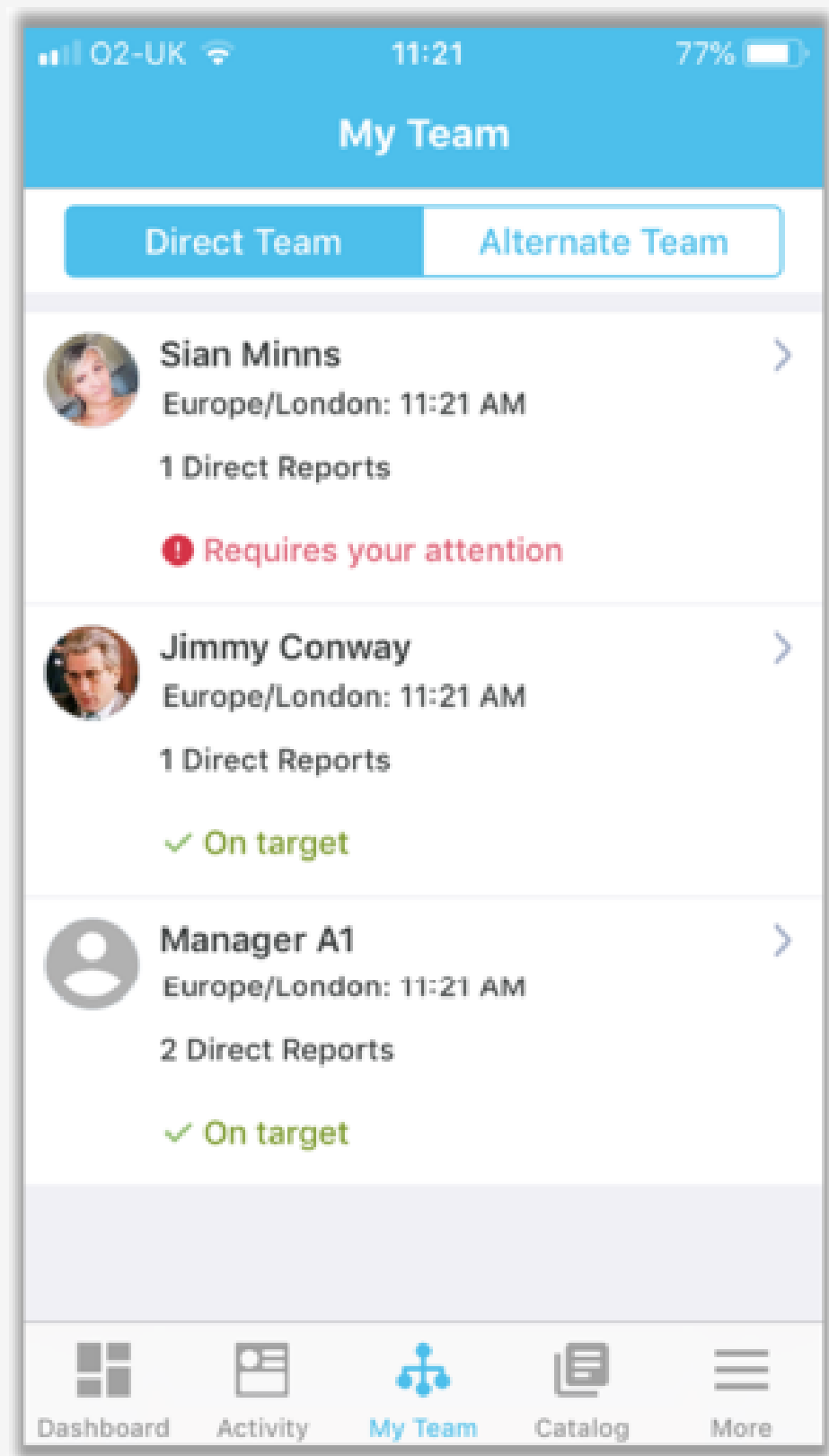
The Saba meeting will load. If doing this for the first time follow the instructions to install. Then select '**Invite People**' to send out the invitation.



View 'My Team' on my mobile



1



If you haven't already installed the 'Saba Cloud' app on your mobile – go to the Learner Quick Reference guide to see how to install.



Here is an example of the mobile app showing how you can view your teams' current learning.

