'How to' guide for the Manager using UoRLearn
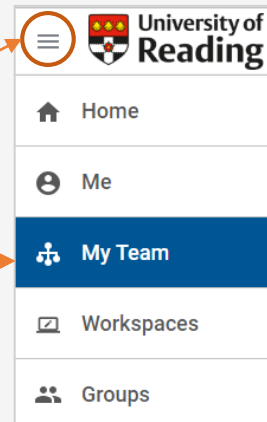
- ➢ View my team's learning
- ➢ Assign learning to an individual or all of my team
- ➢ Approve/Reject learning requests
- ➢ Cancel learning that I have assigned to my team
- ➢ Request learning for your team
- ➢ Learning Request Dashboard
- ➢ Manager Dashboards
- ➢ Download a report on an individual or my team
- ➢ Schedule a virtual meeting
- ➢ View 'My Team' on my mobile

- ➢ UoRLearn support email: UoRLearn@reading.ac.uk

View my team's learning

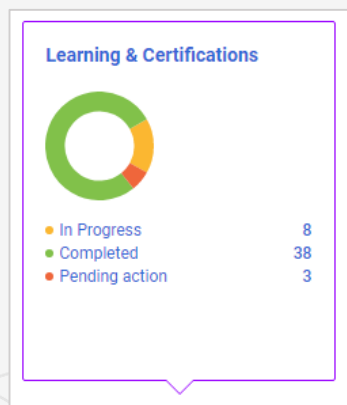**1** Access from the home page by clicking on the **'Burger menu'** > **'My Team'**

University of Reading

- Home
- Me
- **My Team**
- Workspaces
- Groups

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

Direct Team ⌄

Person

NAME	UPCOMING	OVERDUE	APPROVAL
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'.*
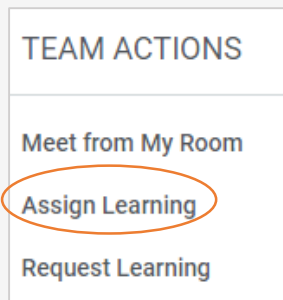
3 The results of their learning will appear below:

Learning & Certifications

- In Progress — 8
- Completed — 38
- Pending action — 3

Learning & Certifications | ▼ Filters ⌄

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 ⌄

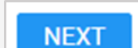# Assign learning to an individual or all of my team

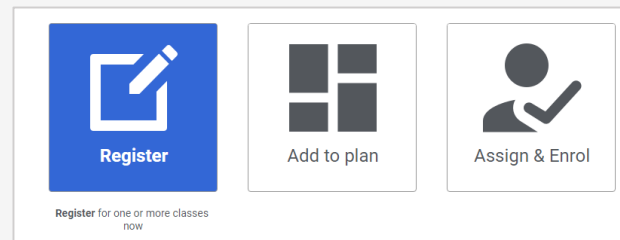**1** On the '**Direct Team**' page, (top right- hand side), select '**Assign learning**'

TEAM ACTIONS

Meet from My Room

Assign Learning

Request Learning

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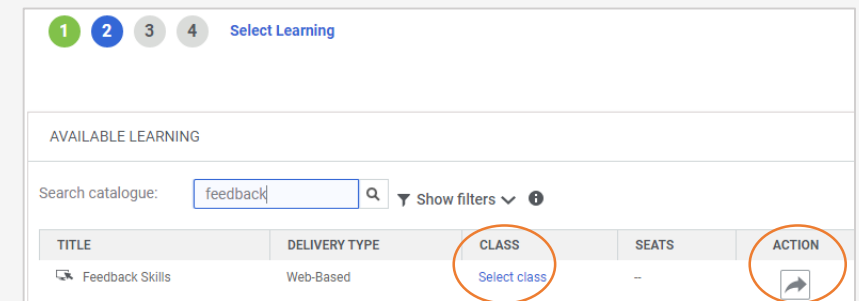
Register

Register for one or more classes now

Add to plan

Assign & Enrol

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.
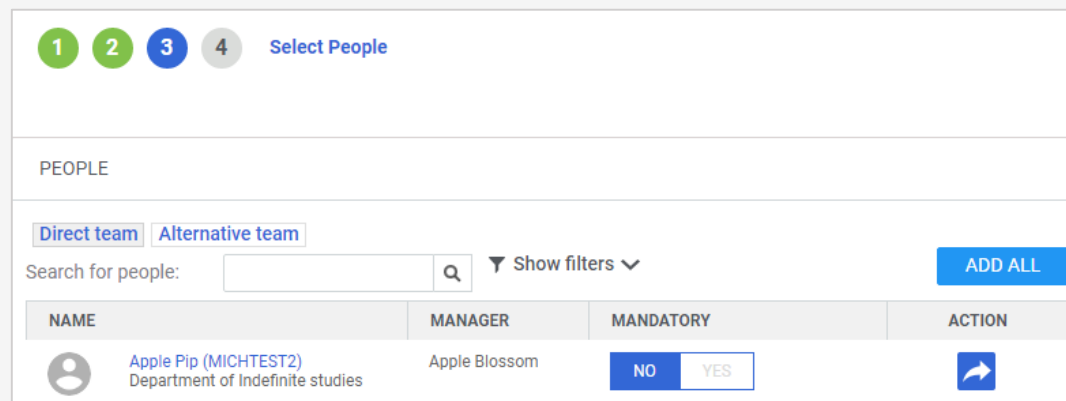
1 2 3 4 Select Learning

AVAILABLE LEARNING

Search catalogue: feedback Show filters

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.
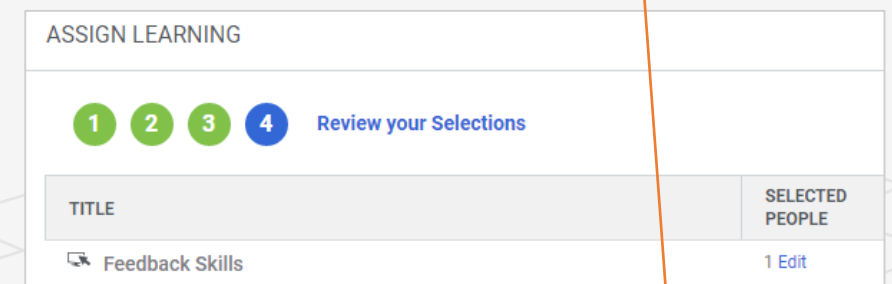
1 2 3 4 Select People

PEOPLE

Direct team | Alternative team

Search for people: Show filters ADD ALL

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

1 2 3 4 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 ○ Offline Go to ▾	1	0	2	ACTIONS ▾

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'**.

REQUEST DETAILS

📖 Coaching   ⊗

Requested Start on/after:

Requested End on/before:

Delivery type: Select a Delivery T

Location :   Search...

Facility :   Search...

Notes:

NEXT

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.

2

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

REQUEST LEARNING

① **②** **③** **Select Course**

AVAILABLE COURSES

Search catalogue: introduction   🔍

TITLE	ACTION
📖 INTRODUCTION TO EXAM FEEDBACK	SELECT
📖 Introduction to Project Managem ...	SELECT

💡 **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**.

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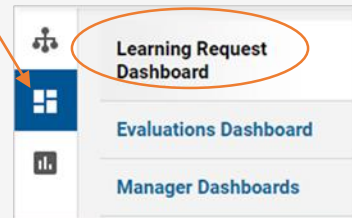
2 The Learning Request Dashboard allows managers to view all learning requests that they have privileges to view, which include:

- 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
Pending	A class request is in *Pending* state till class creation.
Accepted	A class request moves to the *Accepted* state when the learning administrator registers the leaner to an existing or new class against the class request.
Rejected	A class request moves to the *Rejected* state when the learning administrator rejects the request.
Class created	A class request moves to the *Class created* state when a learning administrator creates a new class against the request.

Cancel learning that I have assigned for a team member

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 ○ 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 ⌃
Coaching Course Version:1.0 Instructor-Led Location: Whiteknights Campus Start date: 31/03/2019	IN PROGRESS	30/09/2019 131 days remaining	
Accident_Incident_Investigation	IN PROGRESS	_____	

Add Completed Course
Change due date
Delete from the plan
Add to To-Do List
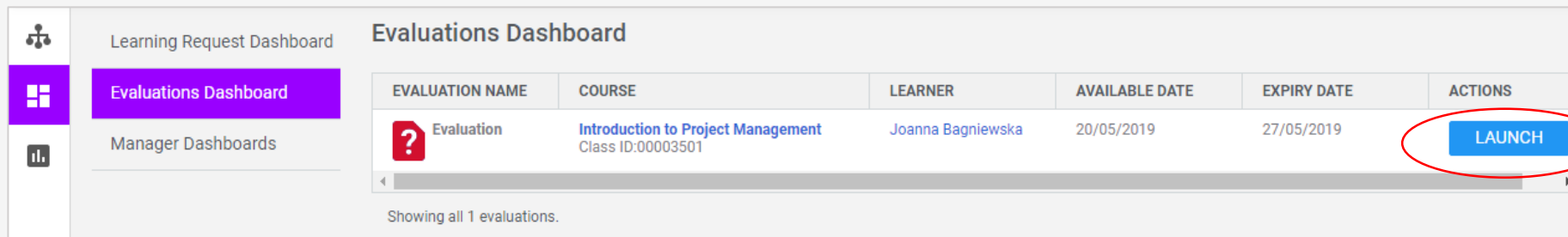
Complete an evaluation for a member of my team

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.

Evaluations Dashboard

Learning Request Dashboard

Evaluations Dashboard

Manager Dashboards

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.

Manager Dashboards

1

Learning Request Dashboard

Evaluations Dashboard

Manager Dashboards

2

Select a dashboard: | Team Status Overview | ▼

Manager Learning Dashboard

My Team Enrolment Dashboard

Team Status Overview

3

My Team's Curricula

Overdue: 4
Acquired: 8
In Progress: 2
Discontinued: 1

Assigned
Acquired
Overdue
In Progress
Discontinued
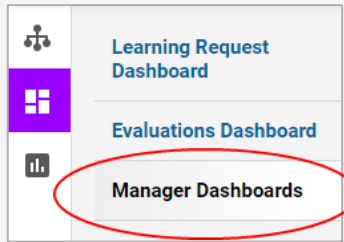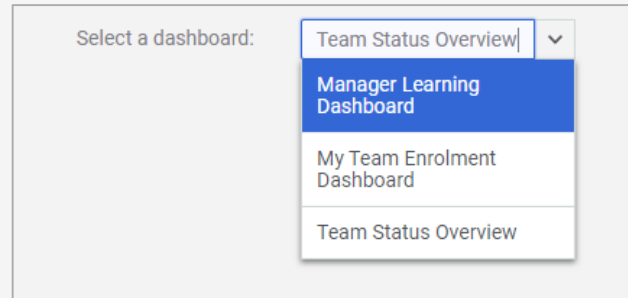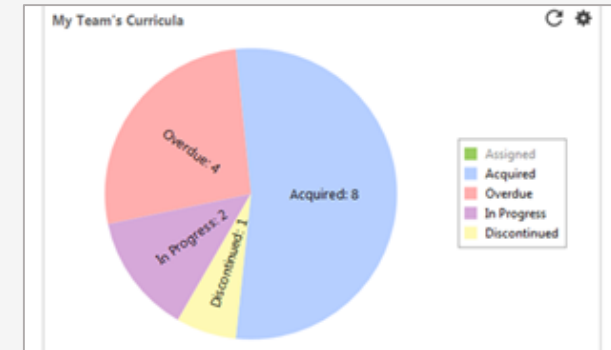
Manager Learning Dashboard gives an overview of the team's learning activities for a particular manager using the following charts:

- My Team's Certifications – courses that are
- My Team's Curricula – courses that are over a period of time
- My Team's Assigned Courses – variety of learning including facilitated, e-learning etc.

My Team Enrolment Dashboard

This dashboard gives an overview of course activity status as well as graph images.

Team Course Completion Status - Team Course Completion Status

	Course Activity Status						
Person Full Name	Not Evaluated	Pending Approval	Pending Registration	Rejected	Successful	Suspended	**Total**
Apple Pip	12	1	1	1	39	3	**57**
Total	**12**	**1**	**1**	**1**	**39**	**3**	**57**

Team Status Overview This Dashboard gives the manager an overview of the team's top level information such as team distribution and learning requests using charts.

Download a report on an individual or my team

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.
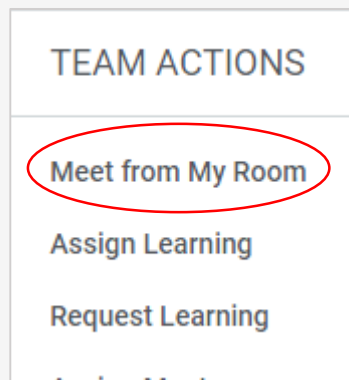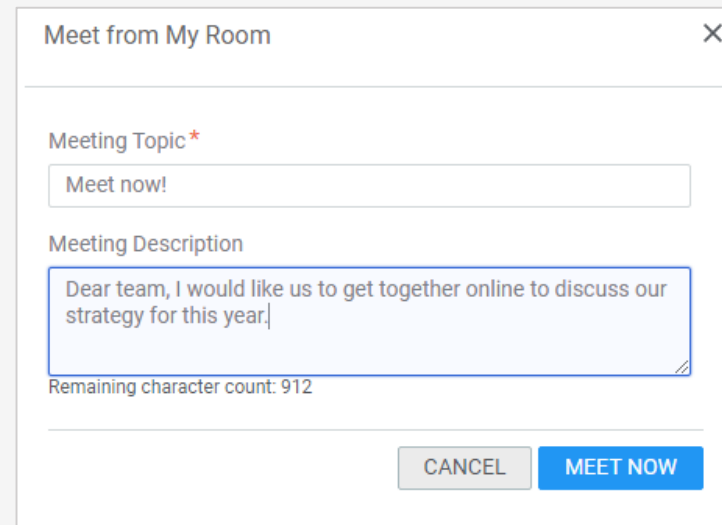
Schedule a virtual meeting

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

TEAM ACTIONS
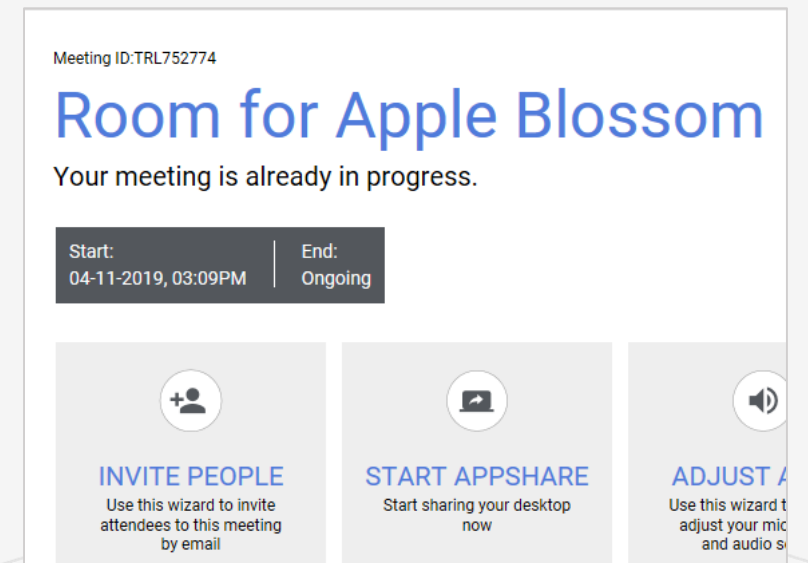
Meet from My Room

Assign Learning

Request Learning

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
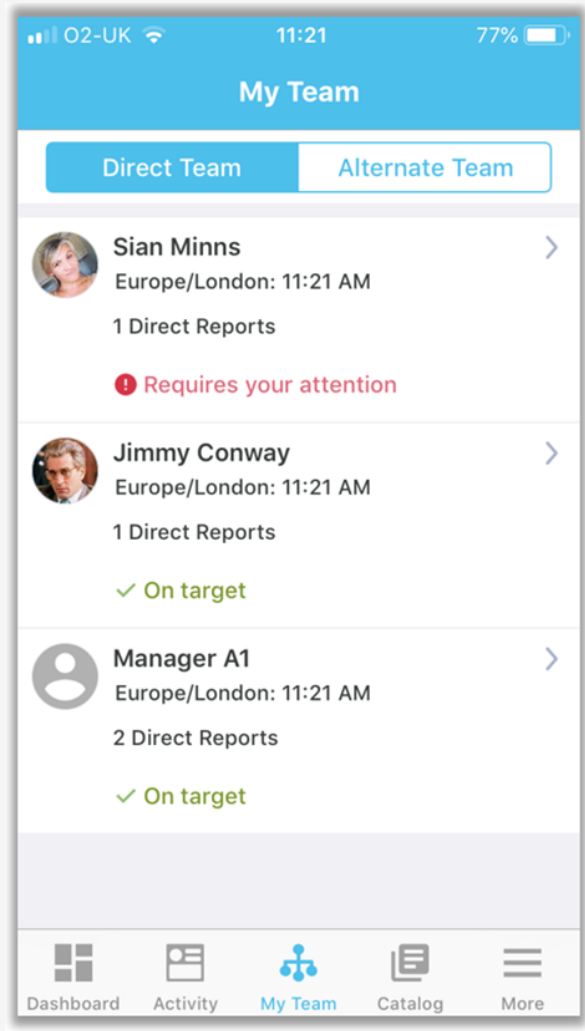
CANCEL   MEET NOW

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.

Meeting ID:TRL752774

Room for Apple Blossom

Your meeting is already in progress.

Start: End:
04-11-2019, 03:09PM   Ongoing

INVITE PEOPLE
Use this wizard to invite attendees to this meeting by email

START APPSHARE
Start sharing your desktop now

ADJUST A
Use this wizard t adjust your mic and audio s

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.

More questions about UoRLearn?

See the Learner quick reference guide: →

[Still stuck? Send an email to]: →