Manager Scenario

Manager Scenario Prerequisites

I **Basics**

- **A.** If you defined a Manager at the end of the day yesterday as described in the documentation then you can log on as that user.
  - **1.** The following tabs are Available
  - **2.** Views
    - **a.** Home
    - **b.** Student Catalog
    - **c.** Course Management
    - **d.** Reports
- **B.** Otherwise Sign on to the LMS as lmsadmin/password
  - **1.** You will have access to all tabs.

II **Go to the Course Management Tab**

- **A.** **In the Enroll section**
  - **1.** Click the By user link
    - **a.** Search for Users to Enroll.
      - 1) Enter "*" in the User ID field.
      - 2) Click on **Search.**
      - 3) Select a couple of users
      - 4) Click **Add Selected**
      - 5) Click **Continue**
    - **b.** Search for a Course
      - 1) Select **Course** as the Course Type
      - 2) Click Search
      - 3) Select the ILT Demo Course created earlier.
      - 4) Click **Continue**
    - **c.** You will be asked to confirm your intentions to enroll the selected users in the selected course - Click **OK**
    - **d.** You will be presented with a Summary report which shows for each user the Action Attempted, and the result of that request - Click **Done**
  - **2.** Click the By Course link
    - **a.** Search for Courses.
      - 1) Enter "*" in the Course Number field.
      - 2) Click on **Search.**
      - 3) Select a couple of courses
      - 4) Click **Add Selected**
      - 5) Click **Continue**
    - **b.** Search for a User
      - 1) Enter "*" in the User ID field.
      - 2) Click Search
      - 3) Select a user.
      - 4) Click **Continue**
    - **c.** You will be asked to confirm your intentions to enroll the selected user in the selected courses - Click **OK**

d. You will be presented with a Summary report, which shows for each user the Action Attempted, and the result of that request. - Click **Done**

B. In the Results Section

- **a.** Click the By User link
- **b.** Search for a user
  1) Enter "ge*" in the First Name field
  2) Click **Search**
  3) Select a user.
  4) Click **Continue**
- **c.** A list of enrolled courses will appear.
- **d.** Select a course
- **e.** Click **Edit**
- **f.** A popup window will load.
- **g.** Edit the following fields
  1) Min Score = 60
  2) Max Score = 80
  3) Raw Score = 90
  4) Enter a start date the calendar icon -
  5) Time spent = 20, 12, 55
  6) Completion Amount = 1
  7) Select "Passed" from the dropdown field as the Satisfied value.
  8) Click **Save**
  9) Repeat for additional courses if desired.
- **h.** Click on the Course Management tab to return to the main menu

2. Click the By Course link

- **a.** Search for a course
  1) Enter a Start After date for next Monday by clicking on the calendar icon -
  2) Click **Search**
  3) Select a course.
  4) Click **Continue**
- **b.** A list of enrolled users will appear.
- **c.** Select a user
- **d.** Click **Edit**
- **e.** A popup window will load.
- **f.** Edit the following fields
  1) Min Score = 60
  2) Max Score = 80
  3) Raw Score = 90
  4) Enter a start date for next Monday by clicking on the calendar icon -
  5) Time spent = 20, 12, 55
  6) Completion Amount = 1
  7) Select "Passed" from the dropdown field as the Satisfied value.
  8) Click **Save**
  9) Repeat for additional users if desired.

3. Click on the Course Management tab to return to the main menu
4. Click on the By Instructor[1] link
    a. You will only be able to edit results by instructor if you are designated as the instructor for a course
    b. If you are not logged on as the instructor for any courses then click **Cancel**
    c. Otherwise
        1) Select a course and continue.
        2) Edit the user results for the course as you did in the last two sections.
        3) Click on the Course Management tab to return to the main menu when finished.

C. In the Manage Section

1. Click the Course link
    a. Search for an ILT course
        1) Select Course as your course type
        2) Click **Search**
        3) Select the "ILT Demo Course" from the list (identifiable by a Start Date).
        4) Click **Continue**.
    b. A new screen loads with four tabs
        1) Course Roster
        2) Wait-list
        3) No shows
        4) Approvals
    c. The Course Roster is the default view and it shows students who are currently enrolled.
        1) You can **Enroll More Users**
        2) View specific user information by clicking on their name link.
        3) Click on George Poirier to view his user information.
            a) Click **Close** when finished.
        4) By selecting a single user or more you can
            a) **Unenroll** users
            b) **Wait-List** users
        5) Select a user from the list
        6) Click **Wait-list**
            a) Notice that that user was immediately removed from the enrolled user list.
    d. Click on the Wait-List tab.
        1) Click **Add Users to the Wait list**
            a) Search for a user
                i) Enter "*" in the Organization field
                ii) Click **Search**
                iii) Select a couple of users.
                iv) Click **Add Selected**
                v) Click **Continue**
                vi) Click **OK** at the confirmation screen

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1 May want to restrict access to this tool through the use of Roles since Managers will not likely be teachers in this client's environment.

    2) Notice now that you have more than one user on the wait list it can be reordered.
        a) Use the Reorder action button to move the bottom user to the Top of the waitlist.
        b) Now if another enrolled user un-enrolls, then the topmost user on the waitlist will be the first to be automatically enrolled in the course.
    3) By selecting a single user or more you can
        a) **Enroll** users
        b) **Remove** users
    4) Select George Poirier from the list
        a) Click **Enroll**
        b) Click **OK** at the confirmation screen
        c) You will be presented with a Summary report.
        d) Click **Done**
e. You are returned to the default tab.
f. Notice that that user was immediately added to the enrolled user list.
g. Click on the No Shows tab.
    1) Select one or more users.
    2) Click the **No-show** action button.
h. Click on the **Approvals** tab
    1) If a user required approval and you were designated as an Approver then you would be able to perform the following actions:
        a) **Approve**
        b) **Deny**
    2) Click on the Course Management tab to return to the main menu when finished.

2. Click the Auto-enrollment profiles link
a. These are sometimes referred to as system Profiles because the Administrator typically defines them.
b. Only the users with the appropriate permissions can assign these Profile types to a user.
    1) Choose the “HR” Category from the dropdown list.
    2) Select the “Office Etiquette” profile
    3) Click **Continue**
    4) Click **Add**
    5) Search for Courses.
        a) Enter **“*****”** in the Course Number field.
        b) Click on **Search.**
        c) Select a couple of courses
        d) Click **Add Selected**
        e) Click **Continue**
    6) Notice that you may also **Delete** items from the course list now.
    7) Click **Done**

3. Click the User Profiles link
- **a.** About User Profiles
  1) These profiles are defined by the administrator
  2) The students can select their own profile based on interests or job role for example.
  3) Once a User Profile has be selected by a student, or assigned by another user with the appropriate permissions, the student will see a list of "Recommended Courses" associated with that User Profiles on the Student Home page.
  4) Choose the ""Technical H2 Specialist"" Category from the dropdown list.
  5) Select the "LMS" profile
  6) Click **Continue**
  7) Click **Add**
  8) Search for Courses.
     a) Enter **"*****"** in the Course Number field.
     b) Click on **Search.**
     c) Select a couple of courses
     d) Click **Add Selected**
     e) Click **Continue**
  9) Notice that you may also **Delete** items from the course list now.
  10) Click **Done**

4. Click on the Unenroll User section.
- **a.** Search for a User
  6) Enter **"*****"** in the User ID field.
  1) Click Search
  2) Select a user.
- **b.** Click **Continue**
- **c.** A list of Enrolled Courses will be shown.
  1) Select a course
  2) Click **Unenroll**
- **d.** You will be asked to confirm your intentions to unenroll the selected user from the selected course.
  1) Click **OK**
- **e.** You will be presented with a Summary report, which shows for each user the Action Attempted, and the result of that request - click **Done**.[2]

2 Point out that ACL controls are in place, which limit access only those catalogs that a manager would need access to for their employees. There by excluding them from executive level courses for example.