

# 'How to' guide for the Manager using UoRLearn

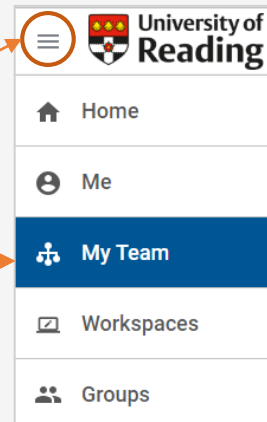
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- UoRLearn support email: [UoRLearn@reading.ac.uk](mailto:UoRLearn@reading.ac.uk)

# View my team's learning

Return to menu

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

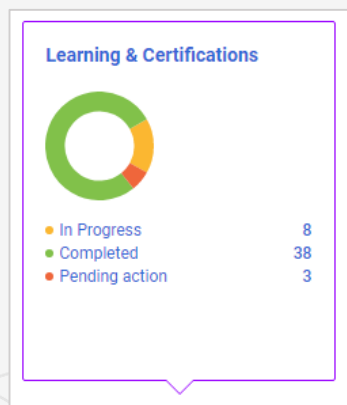


- 2 In 'My Team' – (Direct Team) click on each name to view the learning someone has booked on to.

NAME	UPCOMING	OVERDUE	APPROVAL	
Apple Pip <small>(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London : 3:12 PM</small>	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:

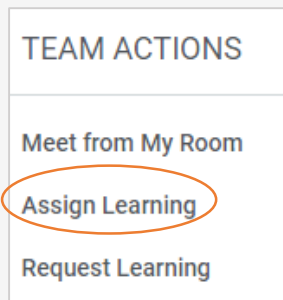


NAME	PROGRESS	DUE	ACTIONS
<b>Coaching Skills for Academic Tutors</b> Course Version:1.0 Blended Location: Whiteknights Campus Start date: 28/03/2019 Source : Apple Pip	<span style="border: 1px solid green; border-radius: 10px; padding: 2px;">IN PROGRESS</span>	29/05/2019 33 days remaining	<span style="background-color: #007bff; color: white; padding: 5px;">VIEW SUMMARY</span> ▾
<b>Introduction to Project Management</b> Course Version:1.0 Instructor-Led Location: Whiteknights Campus Start date: 25/06/2019	<span style="border: 1px solid green; border-radius: 10px; padding: 2px;">REGISTERED</span>	25/06/2019 60 days remaining	<span style="background-color: #007bff; color: white; padding: 5px;">VIEW SUMMARY</span> ▾

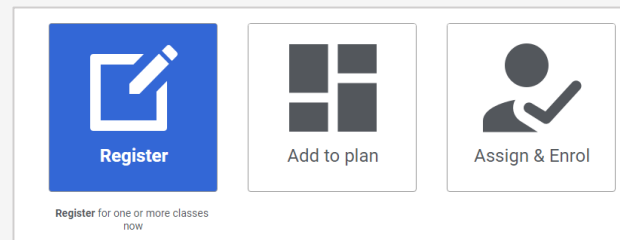
# Assign learning to an individual or all of my team

Return to menu

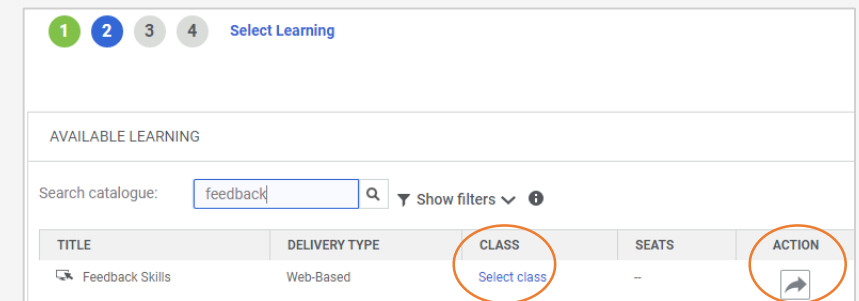
- 1 On the **'Direct Team'** page, (top right- hand side), select **'Assign learning'**



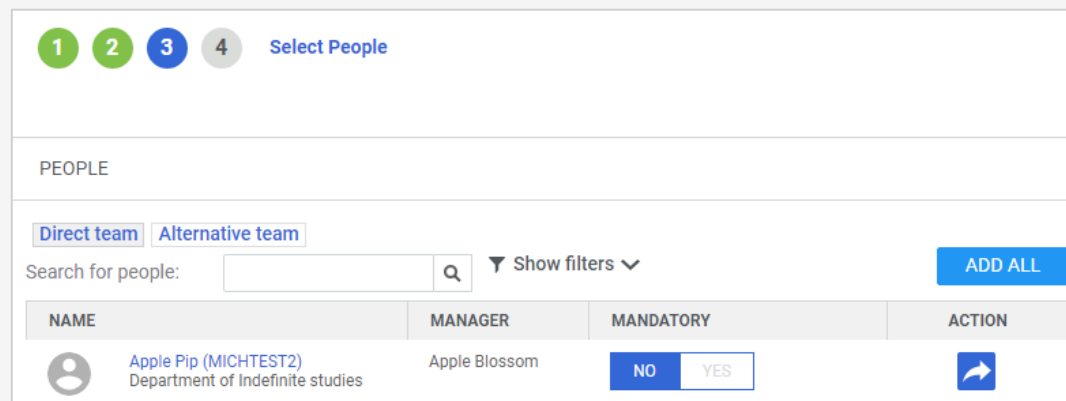
- 2 Click on **'Register'** and go through each step using the **NEXT** button.



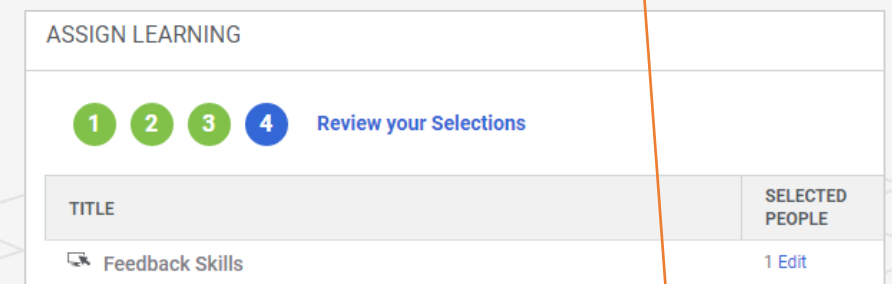
- 3 To select the learning, put a keyword in the search. Find the course, click on **'Select class'** and click on **'Action'** to make the selection.



- 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.



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





REGISTER

# Approve/Reject learning requests



Return to menu

- 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	
 <b>Apple Pip</b>  (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London : 3:12 PM	1	0	2	ACTIONS ▾

Offline [Go to](#) ▾


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

Return to menu

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.

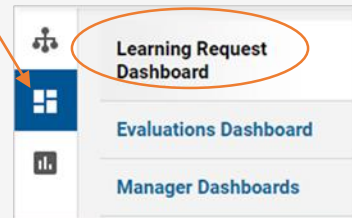
*Please note that learners have the ability to 'request learning' themselves through the Catalogue.*

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

# Learning Request Dashboard

Return to menu

- 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	<a href="#">EDIT</a> 


- 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 for a team member







Return to menu

- 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	
 <b>Apple Pip</b>  (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London : 10:30 AM <input type="radio"/> Offline <a href="#">Go to</a> 	2	0	1	<b>ACTIONS</b> 

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

NAME	PROGRESS	DUE	ACTIONS
 <b>Customer Service</b> Course Version:1.0 Source : Apple Blossom	PENDING REGISTRATION	29/05/2019 7 days remaining	<b>VIEW CLASSES</b>  Add Completed Course Change due date <b>Delete from the plan</b> Add to To-Do List
 <b>Coaching</b> Course Version:1.0 Instructor-Led Location: Whiteknights Campus Start date: 31/03/2019	IN PROGRESS	30/09/2019 131 days remaining	<b>VIEW CLASSES</b> 
 <b>Accident Incident Investigation</b>	IN PROGRESS		<b>VIEW CLASSES</b> 

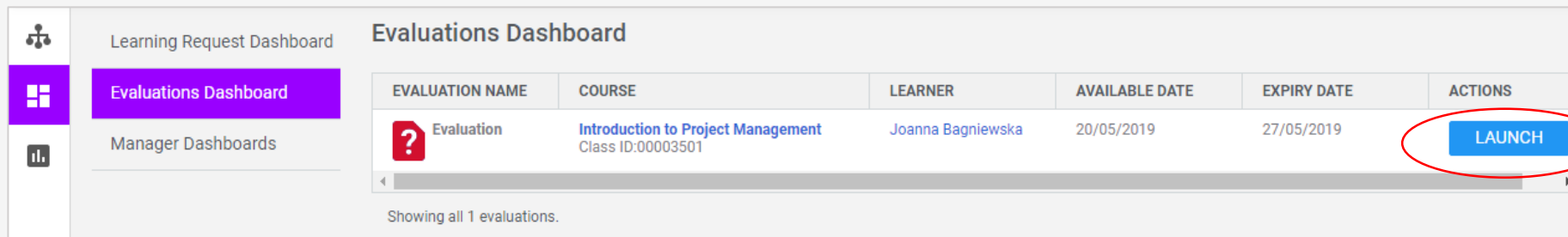
# Complete an evaluation for a member of my team

Return to menu


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

EVALUATION NAME	COURSE	LEARNER	AVAILABLE DATE	EXPIRY DATE	ACTIONS
 Evaluation	<a href="#">Introduction to Project Management</a> Class ID:00003501	<a href="#">Joanna Bagniewska</a>	20/05/2019	27/05/2019	<a href="#">LAUNCH</a>

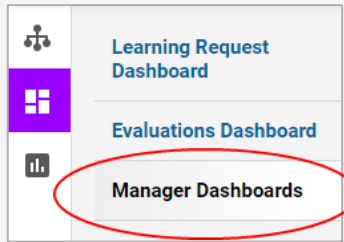
Below the table, it states 'Showing all 1 evaluations.' The 'LAUNCH' button is circled in red.



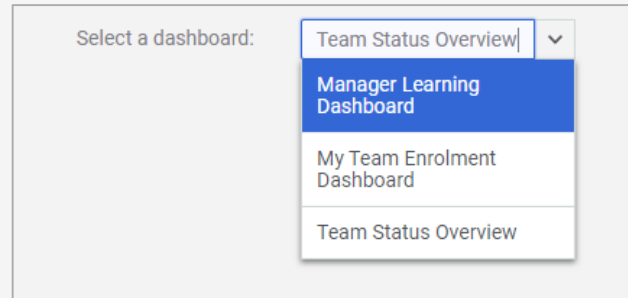
# Manager Dashboards

Return to menu

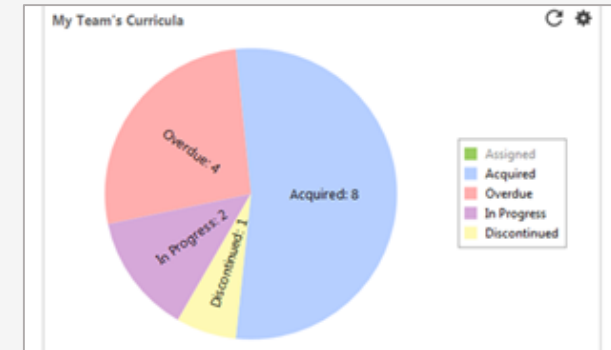
1



2



3



**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
<b>Total</b>	<b>12</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>39</b>	<b>3</b>	<b>57</b>

**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

Return to menu

Name	Last Run Date	Actions
Manager Learning Dashboard	24/04/2019 1:59 PM	<a href="#">Schedule</a>
My Team Enrolment Dashboard	24/04/2019 1:59 PM	<a href="#">Schedule</a>

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\*:

Report format\*:

Recipient type:  Email  Person

E-mail address:  +

Add a few recipients.

Subject: Your \*report\_name\* report is ready.

Body:

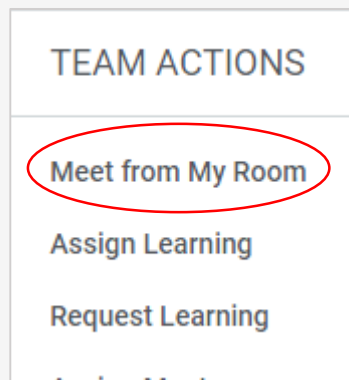
CANCEL **SAVE**

# Schedule a virtual meeting

Return to menu

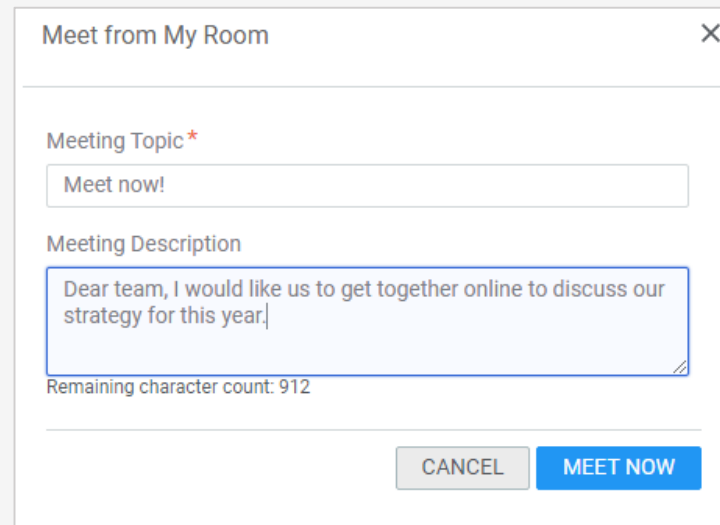
1

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



2

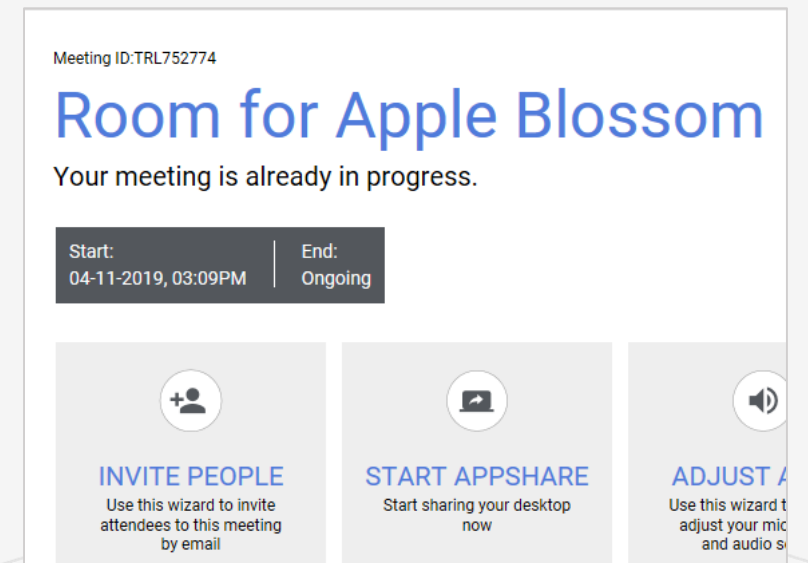
Add the meeting topic and description and click on **'Meet Now'**



A screenshot of a dialog box titled 'Meet from My Room'. It contains a 'Meeting Topic\*' field with the text 'Meet now!', a 'Meeting Description' field with the text 'Dear team, I would like us to get together online to discuss our strategy for this year.', and a 'Remaining character count: 912' indicator. At the bottom, there are 'CANCEL' and 'MEET NOW' buttons.

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.

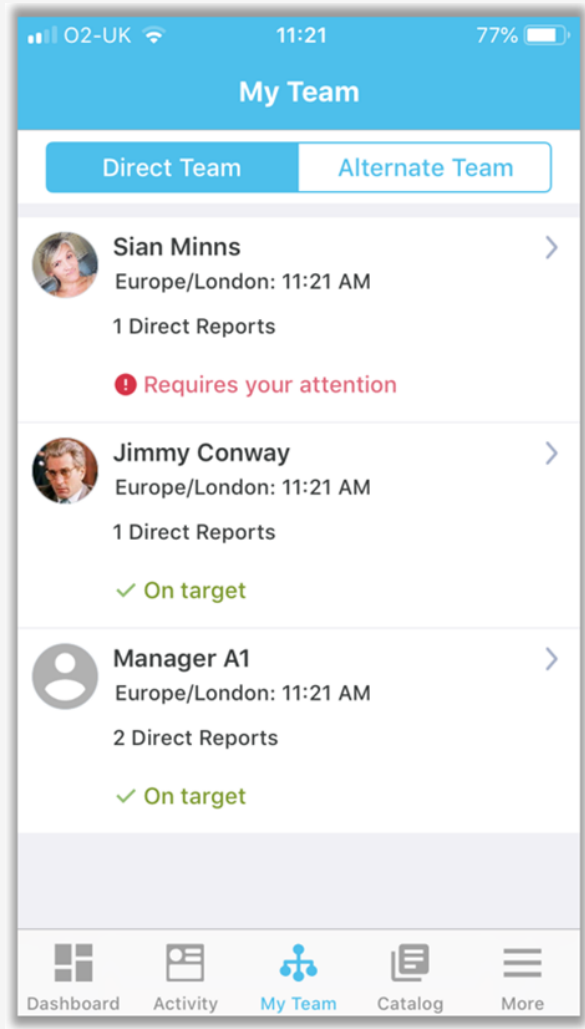


A screenshot of a meeting room interface. At the top, it shows 'Meeting ID: TRL752774' and 'Room for Apple Blossom'. Below this, it says 'Your meeting is already in progress.' There are two rows of information: 'Start: 04-11-2019, 03:09PM' and 'End: Ongoing'. At the bottom, there are three large buttons: 'INVITE PEOPLE' (with a plus and person icon), 'START APPSHARE' (with a laptop icon), and 'ADJUST A...' (with a speaker icon). Each button has a brief description below it.

# View 'My Team' on my mobile

Return to menu

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.

Return to menu

## More questions about UoRLearn?

See the Learner quick reference guide: 

[Still stuck? Send an email to:](#) 