Manager and Enroller Rights in the UC Learning Center

Managers and departmental enrollers may view information about and perform enrollment-related tasks for their direct reports and for employees in departments to which they have been given enroller access (collectively known as "viewable users").

These rights must be established by one of the following actions:

- To manage your direct reports in the system, your employees (direct reports) must first select you as their manager in the UC Learning Center. Please see: Selecting Your Manager.

- To request departmental enroller access, contact training@chr.ucla.edu (Campus) or HRTraining@mednet.ucla.edu (Health System).

Once your direct reports have selected you as their manager or you have been given departmental enroller access, you will see a "Manager" tab next to the default "Learner" tab in the UC Learning Center.

Managers and enrollers will be able to:

- Register viewable users for training
- Receive copies of registration confirmation emails for direct reports
- Cancel viewable users' registration
- View profile information for viewable users
- Access viewable users' training schedules and transcripts
- Access viewable users' assigned training (e.g., Sexual Harassment Prevention or Ethics)
- View, print, and export exception reports for assigned training
Selecting Your Manager

All UCLA staff must select their manager in their user profile. Once selected, the manager may view the employee’s training records and receive email notifications about their course registrations.

Before you select your manager:

- You will not be able to select your manager if you do not have a valid email address in the UC Learning Center. Please see the UC Learning Center Help Guide for more information.
- Two people should NOT select each other as manager. This “circular relationship” will cause all manager selections for both individuals to be dropped from the system.
- If you manage training for a department, please request departmental system access by contacting training@chr.ucla.edu (Campus) or HRTraining@mednet.ucla.edu (Health System).

To select your manager:

1. Click Profile from the menu bar.

2. Scroll about halfway down the page until you see the Manager field, and click Browse.

3. In the pop-up search window, enter your manager’s first or last name, and then click Go.

4. Select your manager from the search results and click OK.

5. Important: Although your manager’s name now appears in the Manager field, you must click OK at the bottom of the profile screen to save this change. You will see a confirmation that the changes to your profile have been saved.
Accessing Viewable User Information

To view a list of your direct reports and other viewable users:

1. Click the **Manager** tab to switch to Manager mode.

2. In the upper right-hand corner beneath your user name, click **Change view**.

3. In the Select User window, leave the search box blank and click **Go**.

The search results will display your direct reports and other users you have rights to view.
To view individual user profile and training information:

In the upper right-hand corner beneath your user name, click **Change view**.

In the Select User window, enter a first and/or last name (no commas) and click **Go**.

**Note:** Be careful to use the exact name – nicknames or spelling variations are not accepted (e.g., “Joe” will not find “Joseph”).

1. Select the user from the search results list and click **OK**.

The Select User window will close and the selected user's name will display underneath yours in the upper right-hand corner of the UC Learning Center window.
After selecting an individual user via the steps above, you will see information specific to this user.

The **To Do** panel shows training the user is assigned, scheduled for, currently attending or in-progress.

The **Profile** panel shows user details including contact information, home department, and job codes.*

* This information comes from the Employee Database (EDB) and from the Campus Directory database. Please contact your departmental updater to correct any inaccurate information in these databases. Updates to EDB take up to 3 days to appear in the UC Learning Center while updates to the Campus Directory can take up to a week.
The **Assess** and **Learn** menus function similarly to Learner mode; however, the information that is displayed using these menus is for the selected user whose name appears under the manager's name, rather than the manager's own information.

Under **Assess > Training Analysis**, you can view the user's assigned training. For more information, please see: [Viewing Others' Assigned Training](#).

Under the **Learn** menu, you can access the following options:

- **Catalog** – register the selected user in training
- **Training Schedule** – view user's current, upcoming, completed, cancelled, and waitlisted activities
- **Learning Activity Evaluations** – n/a
- **Learner Approvals** – n/a
- **Messages** – view system-generated messages to this user within the past 60 days
- **Learning Activity Reports > Training Transcript** – view user's completed courses

For more information about these features, please see: [UC Learning Center Help Guide](#).

To remove the user selection and return to the default Manager home page:

1. In the upper right-hand corner next to the currently selected user's name, click **Change view**.

2. In the Select User window, select **Workgroup of all viewable users** and click **OK**.
Viewing Others' Assigned Training

Based on employee status, job code, home department, or other criteria, your employees may have assigned training in the UC Learning Center. Examples of commonly assigned courses include Ethics and Sexual Harassment Prevention.

Some assigned training is labeled a “Certification” and may include an expiration date which indicates that it must be renewed on a periodic basis (e.g., Sexual Harassment Prevention).

To find an individual employee's assigned training:

1. Switch to Manager mode.
2. Change the view to select an individual user (see Accessing Viewable User Information).
3. Go to Assess > Training Analysis.

You will see a list of the selected user's assigned training courses and related information. You can use the Filter by: and View: menus to change the display based on assignment type or status.

The selected user's status for each assignment displays in the right column of the Training Analysis.

Please note: if an employee previously had a training assignment which is no longer visible, then he or she is no longer required to complete the course. The assignment may have been removed due to a change in job code or employment status, or a revision of assignment criteria.
About Assignment Status

The following flowchart shows the assignment and certification cycle.

- When a user is assigned training, the initial status is **Assigned**.
- If the user has launched a required eCourse at least once, the status changes to **In Progress** - **Registered**.
  - If the user has registered for a required classroom training, the status changes to **Registered**.
  - If the user has not completed the assignment by the due date, the status changes to **Overdue**.
  - If the user has completed the assignment, the status changes to **Completed** or **Acquired** (certifications only).
- If the training must be renewed periodically, the status will change to **Expired** after the expiration date if the user hasn't completed it again.

**Please note:** if an employee completed an assigned training, and then later registered for or launched the same course again, the original completion is still valid. Although the user’s Training Schedule will show the new registration or in-progress attempt, the Training Analysis will still show the “Completed” or “Acquired” status and last completed date. You or the employee may cancel the new registration or attempt from the Training Schedule without affecting the past completion.
Viewing Exception Reports

The Exception Report on the Manager home page displays summarized progress information about assigned training for a manager’s viewable users, plus detailed information for those assignments which are incomplete.

By default, you will see a Summary Exception Report by Activity with data for Direct Reports.

The table shows overall progress and the number of incomplete assignments by the selected group.

- Use the tabs to switch between displaying data by Activities or by Users.
- Use the Display menu to switch between Direct Reports and All Viewable Users.

To see a Detailed Exception Report by Activity which lists assigned users with incompletes, click the linked text under the Details column. Please note that a detailed report is not available if 0 users still need to complete the activity.
The Detailed Exception Report by Activity displays all viewable users who have not completed the assigned activity.

**To export the report to Excel:**

1. Click the Export icon.

2. Select All pages, and then click Next.
3. Once the export is complete, click the **File 1** link to download the file.

4. Choose the **Save File** and then click **OK** to save the file to your computer. Depending upon your browser settings, you may be prompted to name the file and select a download location.

The downloaded file can then be viewed, sorted, edited, and printed using Excel.
Registering Others for a Course (Learner Mode)

Only designated managers and enrollers are able to register other UCLA employees for training. Registrations can be done either via Learner mode or via Manager mode.

For courses with a fee:
- To register multiple people in one batch, you must use the same payment method (check or FAU).
- If FAU is selected, the same FAU must be entered for ALL users you are registering at that time.
- To use different payment methods or FAUs for different users, register those users separately.

To register others via Learner mode:

1. After finding a course via the catalog or search, select Other Actions, then Register Others.

2. Depending upon the course, you may need to select dates or sessions. Then click Continue.
3. In the Select Users panel, click Add under Available Users.

4. In the pop-up window, “Select viewable users” will be pre-selected. Click Next.

5. You will see a list of people who you have permission to register. Select the individual users to register by checking the box next to their name in the list. Then click OK.
6. The users you selected will then display in the **Available Users** panel. Verify the users you have selected, and then click the top arrow button to move the users to the roster in the **Registration** panel. (If the roster is full, you have the option to move them to the Waiting List instead.)

![Image of user selection and registration interface]

7. Click **Submit** at the bottom of the page to continue the registration process.

The rest of the registration process is identical to the self-registration process, with the exception that instead of a confirmation page, you are returned to the Learner home page.

Please see **Registering for a Course** in the [UC Learning Center Help Guide](#) for more information.

You can also register others via Manager mode. Please see: **Registering Others for a Course (Manager Mode)**.
Registering Others for a Course (Manager Mode)

From Manager mode, you can register others from either the "Workgroup" or "Viewable User" views.

To register user(s) from the Workgroup view:

1. Verify that you are in Manager mode and that "Workgroup" is the selected view.

   ![Workgroup View Image]

2. Locate a course using either the Search box or the catalog (Learn > Catalog).
3. Select Other Actions, then Register Others.

4. Follow the normal batch registration steps to add user(s) to the roster and complete the registration. See: Registering Others for a Course (Learner Mode).
To register a user from the Viewable User view:

1. Verify that you are in Manager mode and that another user's name displays under yours.
   
   You are now "impersonating" the selected user, so you will register this person as if you were registering yourself rather than another user.

2. Go to **Learn > Catalog** and select a course.

3. Click **Register**.

   ![Registration Process](image)

   The rest of the registration process is identical to the self-registration process, with the exception that instead of a confirmation page, you are returned to the viewable user's home page in Manager mode.

   Please see **Registering for a Course** in the [UC Learning Center Help Guide](#) for more information.
Cancelling Others’ Registrations (Manager Mode)

Unlike registrations, cancellations for other users must be done in Manager mode in the Viewable User view.

To cancel a registration for another user:

1. Go to Manager mode and change the view to the user whose registration you wish to cancel.

   ![](image1.png)

   The selected user’s name now displays in the top right corner under your name, indicating that you are viewing this individual’s training information.

2. Select Learn > Training Schedule.

   ![](image2.png)

3. Check the box to the left of the activity registration you wish to cancel, and then click the Go button next to the “Cancel registration” task menu.

   ![](image3.png)
4. Click **Cancel Marked** to complete the cancellation process.

The user’s roster status will be changed to “canceled” and they will receive a cancellation notification via email.