Manager Quick Reference Guide

Emory Learning Management System (ELMS)
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# ELMS Terminology

## Catalog Item

Formerly referred to as a “course,” it describes a training offering, e.g., Time Management, but does not provide a specific date and time.

## Learning Activity

A specific instance of a training offering, formerly referred to as a class (e.g., Time Management delivered on Monday, September 15th, from 8:30 – 12:00)

**Note:** You ENROLL for Learning Activities, and REGISTER for Programs.

## Delivery Method Type

Type refers to the method in which the learning activity is delivered, e.g.,

- Classroom (or instructor-led)
- Online
- Webinar

## Programs (2 types)

1. **Curriculum (program)**
   - Set of catalog items (courses)
   - No deadline for completion
   - No expiration date
   
   An example of a curriculum program would be the Manager Development Program offered by Learning Services.

2. **Certification (program)**
   - One or more catalog items (courses)
   - Completion deadline
   - Expires (validity period)
   
   An example of a Certification Program would be any required training that must be repeated in order for you to remain certified or the training to be considered valid, e.g., Defensive Driving, safety training, CPR.

**Note:** You ENROLL for Learning Activities, and REGISTER for Programs.
**Lesson Components**

Lesson components refer to any and all modules that make up a learning activity, e.g.,

- Session (classroom)
- Online (module)
- Survey
- Test

**Learning Plan**

A Learning Plan is a list of catalog items that you plan to take. You might design this plan as part of your professional development planning for the year.

**Status**

Status indicates the current status of your learning activity. Status types include:

- **Enrolled**: You are enrolled for an upcoming activity.
- **Dropped**: You were enrolled in a learning activity, but dropped the enrollment prior to attending.
- **Registered**: You have registered for a program (curriculum or certification). Note: Once you register for a program, you must still enroll in each activity within the program.
- **In-Progress**: You have started an activity or program but have not completed it, e.g., began an on-line course, but have not yet finished it.
- **Completed**: You have satisfactorily completed the activity.
- **Not Completed**: You did not complete the activity successfully (e.g., did not show up for the activity, left the activity before it was concluded, etc.)

**Certification Status**

Certification Status indicates the status of your certification. Certification status includes:

- **Certified**: You have passed your required training and are still within the period of time for which it is valid.
- **Warning**: Your certification period is about to come to an end (e.g., you will lose your certification in the next 30, 60, or 90 days).
- **Expired**: Your certification period ended and you have not taken and/or passed the training that is required to continue your certification.
View Team Members Training

Go to: https://elmprod.emory.edu

To view your team members, click on the Team Members link under “My Team Learning.”
You will see a list of employees that report directly to you. (Note: If an employee is not listed, you should contact your departmental HR representative and ask them to update the PeopleSoft HR database to show you as the supervisor.)

**Team Members**

Team Members is a list of all your direct reports. You can view details about each member by selecting from the Go To pull-down and clicking the Go button. If any of your team members have direct reports, you can view their team by choosing the team member in the View pull-down and clicking the Go button. Learning Approvals is a list of your team's pending learning requests. You can also approve or decline requests on this page. If you would like to see more information about a request click the name of the learning activity or program.

### Pending Approvals

You currently do not have any pending learning approvals to approve or deny.

<table>
<thead>
<tr>
<th>Direct Reports</th>
<th>Name</th>
<th>Job Title</th>
<th>Hire Date</th>
<th>*Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Team Member 1 Name &amp; Job Title</td>
<td></td>
<td>06/06/2006</td>
<td>Go To...</td>
</tr>
<tr>
<td></td>
<td>Team Member 2 Name &amp; Job Title</td>
<td></td>
<td>06/01/2009</td>
<td>Go To...</td>
</tr>
<tr>
<td></td>
<td>Team Member 3 Name &amp; Job Title</td>
<td></td>
<td>02/13/1998</td>
<td>Go To...</td>
</tr>
</tbody>
</table>
You can also click on “View Team Reporting to Me” and select your direct reports who are also supervisors, click Go, and view their team members. In this example, Team Member 1 is also a supervisor.
# Team Members

Team Members is a list of all your direct reports. You can view details about each member’s learning by selecting from the Go To pull-down and clicking the Go button. If any of your team members have direct reports, you can view their team by choosing the team member in the View pull-down and clicking the Go button. Learning Approvals is a list of your team’s pending learning requests. You can also approve or decline requests on this page. If you would like to see more information about a request click the name of the learning activity or program.

## Pending Approvals

You currently do not have any pending learning approvals to approve or deny.

### Team Members

View Team Members Reporting To:

<table>
<thead>
<tr>
<th>Team Member 1</th>
<th>Name &amp; Job Title</th>
<th>Hire Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Member 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team Member 4</td>
<td>Name &amp; Job Title</td>
<td>1/9/2007</td>
<td>Go To...</td>
</tr>
<tr>
<td>Team Member 5</td>
<td>Name &amp; Job Title</td>
<td>10/2006</td>
<td>Go To...</td>
</tr>
<tr>
<td>Team Member 6</td>
<td>Name &amp; Job Title</td>
<td>3/2001</td>
<td>Go To...</td>
</tr>
</tbody>
</table>

*Group Actions: Select*
To View an Individual Employee’s Training Record, select the team member’s name, select Team Learning in the Action Box, and click Go. (Note: You can view the training for the entire team by selecting all of the team members.)

<table>
<thead>
<tr>
<th>Team Members Reporting To</th>
<th>Direct Reports</th>
<th>Name</th>
<th>Job Title</th>
<th>Hire Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team Member 1 Name and Job Title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team Member 2 Name and Job Title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team Member 3 Name and Job Title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Pending Approvals:
You currently do not have any pending learning approvals to approve or deny.

Group Actions: Select Go

Team Learning Search Catalog Browse Catalog Request New Learning
You will be able to view the individual’s training, based on different filters (in this example, the filter is set to Current Learning). In addition to the title of the activity, you can see the date and status of the upcoming training. To learn specific information about the course, you can click on the course title. You can also drop this person’s enrollment in the class by clicking on the Drop Button.
Enroll an Employee in a Learning Activity
Select one or more employees to enroll into a learning activity, select “Enroll” in the Group Actions box and click Go. (Note: To select more than one employee, click on the box to the left of the employees that you would like to attend training.)

The Search Catalog page will be displayed and you can search for a catalog item (course), activity, or program for the team member(s).
Search the Catalog the same way that you would to enroll yourself in a learning activity. Once you have located the activity, you can click the Enroll button and enroll the employee(s) directly into the class.
You will get a Review Information page. After ensuring this is the correct activity, click “Submit Enrollment.”

You will get an Enrollment Confirmation page indicating that the team member has been successfully enrolled or waitlisted.
If you are enrolling multiple team members, your confirmation will provide you with information for each employee. In the example below, you can see that two employees were enrolled in the class and the third was put on the waitlist.

<table>
<thead>
<tr>
<th>Team Member 1</th>
<th>ID #</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Member 2</td>
<td>ID #</td>
<td>Job Title</td>
</tr>
<tr>
<td>Team Member 3</td>
<td>ID #</td>
<td>Job Title</td>
</tr>
</tbody>
</table>
Approve Enrollment for an Employee

If a training activity requires supervisory approval, you will be able to provide the approval by going to Manager Self Service, Team Learning, and Team Members.
On the Team Members page, under “Pending Approvals” you will find a message indicating whether or not you have any pending approvals. In the example below, there are no pending approvals for the manager.
In the next example, approvals are pending. Click Approve, and you will get a confirmation page showing the employee’s new status is “Enrolled.”

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Type</th>
<th>Name</th>
<th>Price</th>
<th>Approval Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Learning Approvals**

View your approval transactions. You can select the Team Member name to view their user profile and select the Learning name to view your team members progress and the details of the learning.

- Your transaction has been processed. Table below shows the new status.

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Type</th>
<th>Name</th>
<th>Price Per Seat</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Activity</td>
<td>Communicating a Shared Vision</td>
<td>0 USD</td>
<td>Enrolled</td>
</tr>
</tbody>
</table>
View My Team Learning Page

Team Learning is a list of the Learning your team members are enrolled in and certifications for which they are registered. To access the Team Learning Page, click on Team Learning link.
You can view the details, progress status, and schedules for their learning by clicking on the name of the activity or the program. To filter results, select a filter and/or a Learner and click the “Go” button.
View Team Certification Status

To view the certification status of team members, click on Certification Status under “Team Learning.”

A page will be displayed that shows the team member(s), the certification, the status, the date of the status, and the expiration date.
Add Supplemental Learning for an Employee
Depending on how you manage your department, encourage your employees to enter their supplemental training through the ELMS Self Service. However, if you manage all of their learning activity, please make sure you are getting all pertinent external training information from your employees so that it is accurately reflected in their records.

Supplemental Learning is learning that is not offered through the Emory Learning Management System (ELMS). This may be learning obtained at a conference or provided by an outside organization.

Click on “Supplemental Learning” under Team Learning.

A page will be displayed that provides a list of your team members. Click the “Add” button.
You will see the Supplemental Learning page for that employee. To add Supplemental Learning to an employee’s record, select the appropriate type of learning and click “Continue.”
A Supplemental Learning Details page will appear for you to enter the required information, and click “Save.”
Team Learning Plans
A Learning Plan is a list of catalog items that an employee plans to take. An employee might design this plan as part of his/her professional development planning for the year. As a manager, you can add items to, or delete items from, an employee’s existing Learning Plan. You can also create a new Learning Plan for an employee.

Click on “Team Learning Plans” under Team Learning.
You will see a list of your team’s learning plans. You can select the learning plan that you want to review or update by clicking on the title of the learning plan.

You will see a page that shows the Learning Plan Details for that employee. You can add a new learning plan for that employee if you desire.
You can also choose to “Update Learning” Plans by clicking on that link.

You can select one or more learners from the list by checking the check box next to their name. Click “Create a New Learning Plan” link to assign a learning plan or click “Add New Learning to Plan” to assign a learning activity to the existing learning plan.
If you assign a new learning plan, that plan will then be listed on the Team Learning Plans page. You will also see that there are two new columns: Assigned By (which shows your name) and a Delete column, which you can use to delete the learning plan should you desire. The employee cannot, however, delete a learning plan that you assign.
Who do I contact for department-specific training questions?

Need help with a specific training course? Contact the departmental training administrator for that division:

1. **Campus Services**
   - Jackie Reese, 404-712-2465, Jackie.reese@emory.edu

2. **Development and Alumni Relations (DAR)**
   - Betsy Hames, 404-712-4720, bhames@emory.edu

3. **Environmental Health and Safety (EHSO)**
   - Diane Kusek, 404-727-8437, diane.kusek@emory.edu

4. **Finance**
   - Charles Walker, 404-727-2566, crwalke@emory.edu

5. **HR-Learning Services**
   - La Sheree Mayfield, 404-727-7607, lmayfie@emory.edu

6. **Office of Research Compliance (ORC)**
   - Sonia Delbridge, 404-727-2312, sdelbri@emory.edu

7. **Office of Clinical Research (OCR)**
   - Alison Dunkerley, 404-727-5982, alison.j.dunkerley@emory.edu

8. **School of Medicine**
   - Rachelle Lehner, 404-727-4529, RLEHNER@emory.edu