

LS MANAGER DASHBOARD USER GUIDE

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Welcome! This document is for Leadership System coaches accessing their Manager Dashboard in our Learning Management System (LMS). Please use this document to acclimate yourself to the features and functions of our LMS.

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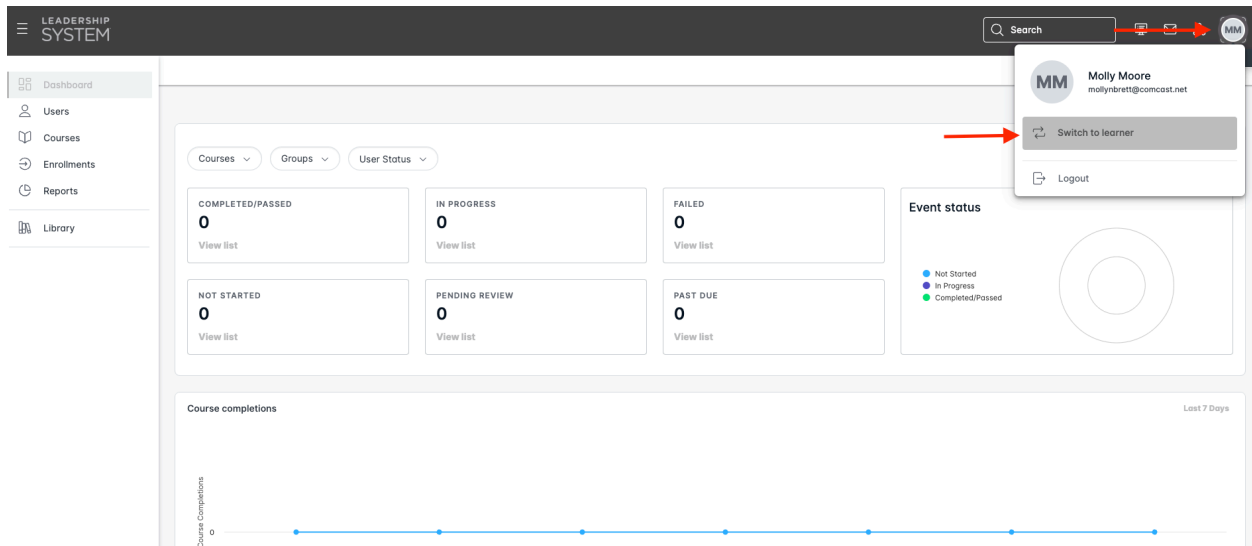
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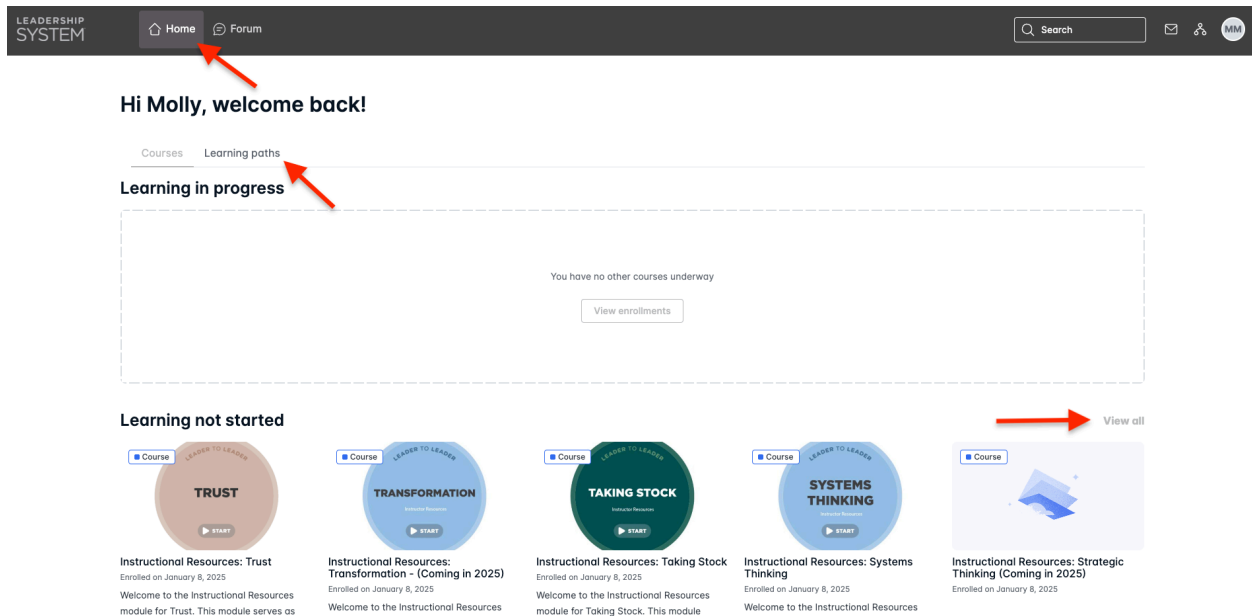
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HOW TO ACCESS THE LEADERSHIP SYSTEM MODULES

Log into the LMS and you will land on your Manager Dashboard. From here you will want to navigate over to your profile icon in the righthand corner, select "Switch to learner" from the dropdown.

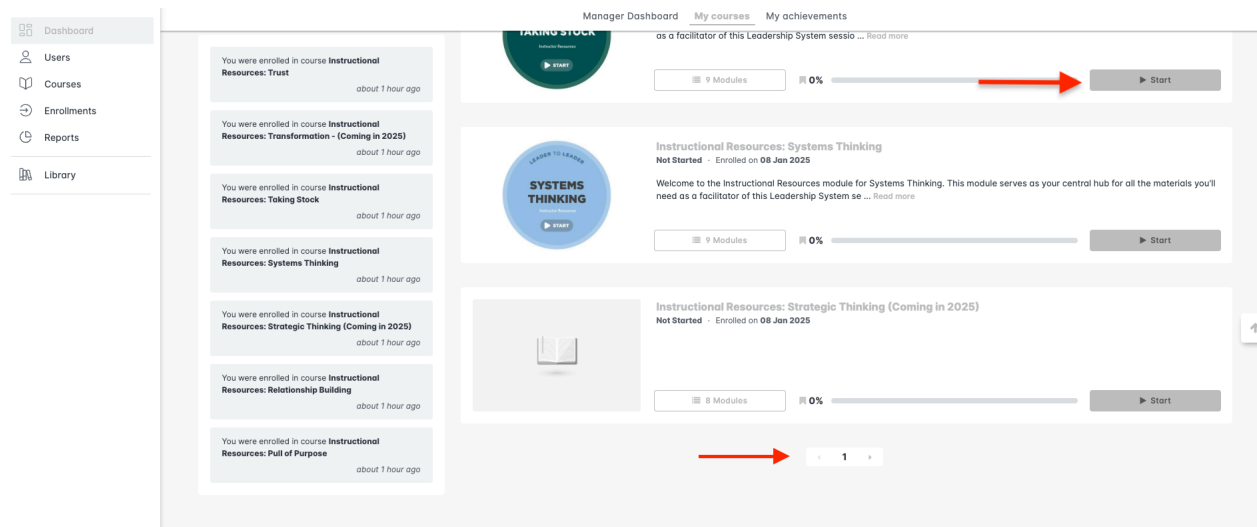


From here you will see the LS modules listed on the Learner Home page. You can select the "View all" option or you can select "Learning paths". It will take you to the same page.

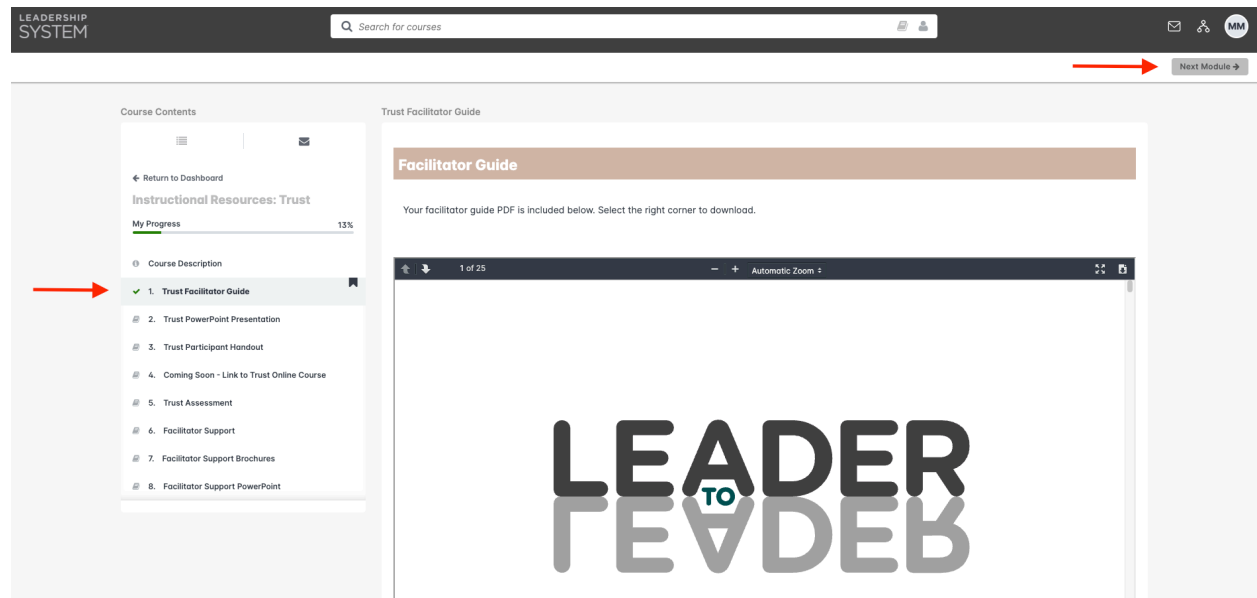


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On this page you will have access to all the Leadership System modules. Use the arrows at the bottom of the page to navigate through the pages. To access a module select the “Start” button.

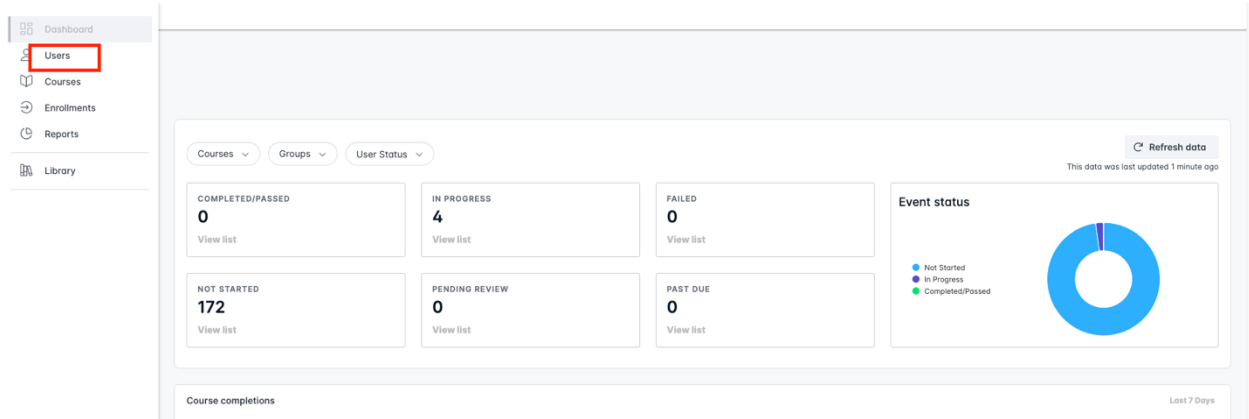


From here you will have access to the Instructional Resources for the module you have selected. Navigate through the page by selecting the "Next Module" button in the top right corner or use the navigation to the left.



HOW TO SET UP YOUR CLIENTS AS USERS IN THE LMS

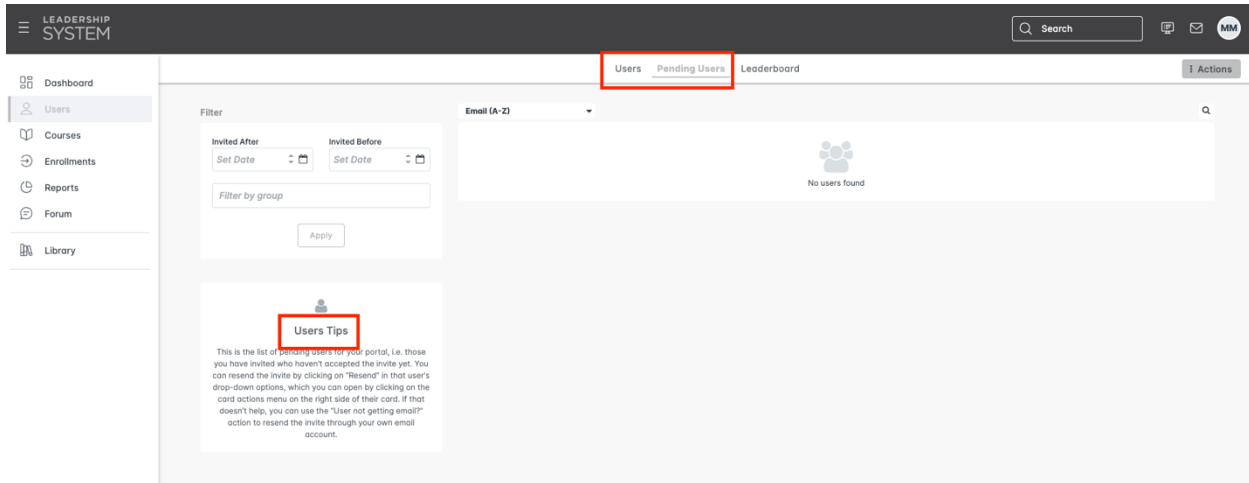
Navigate to your Manager Dashboard and select “Users” on the left side navigation bar.



The Users screen will list all your “Users” and “Pending Users”.

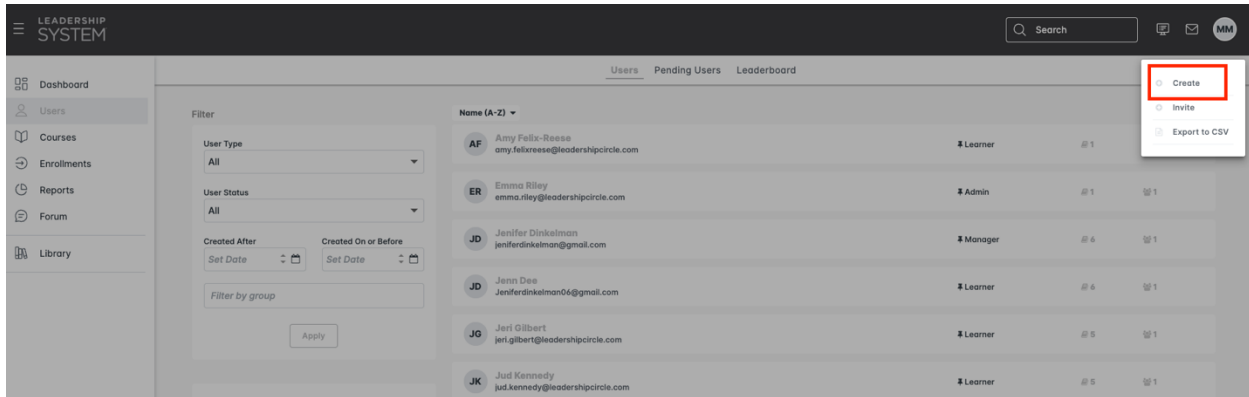
- “Users” are your clients that have accepted their invitation to join.
- “Pending Users” are your clients who have not yet accepted their invite.

There are handy “Users Tips” throughout the portal that provide helpful hints and best practices for navigating the platform.

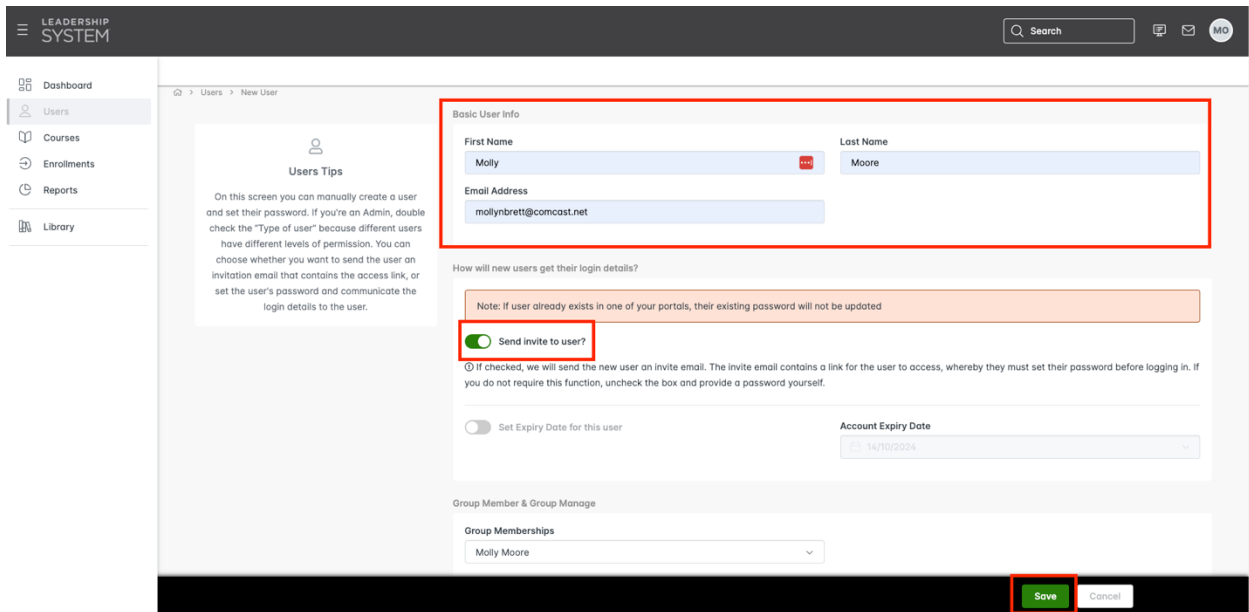


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To add a user, click the “Actions” button on the top right of your screen and select “Create”.



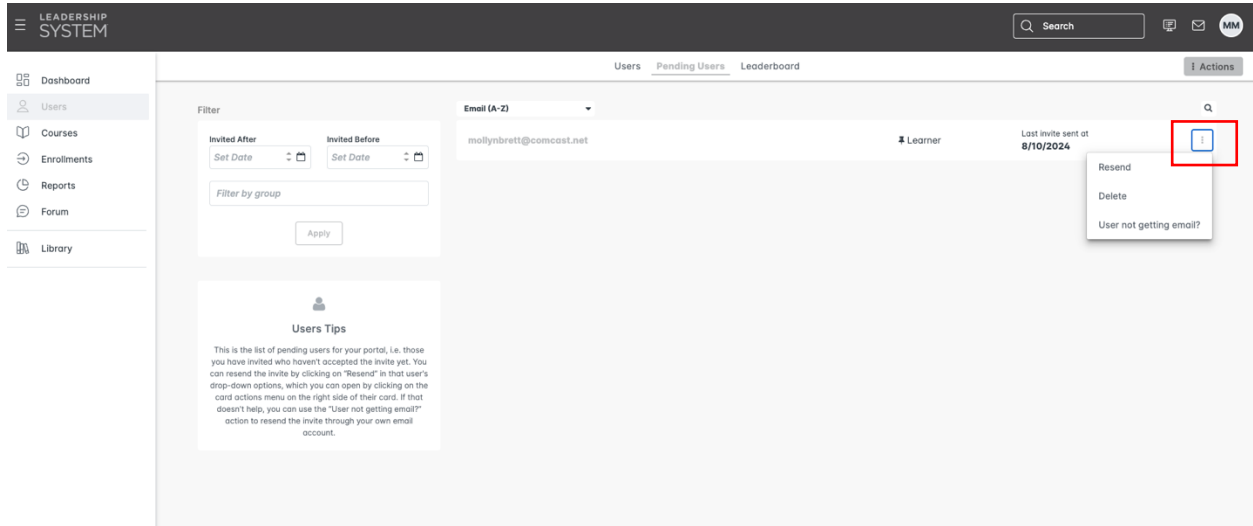
You will set up your user on this screen, adding their first name, last name and email address. Make sure the “Send invite to user?” button is turned on (shows green) and then save your work by selecting the green “Save” button at the bottom right corner of your screen.



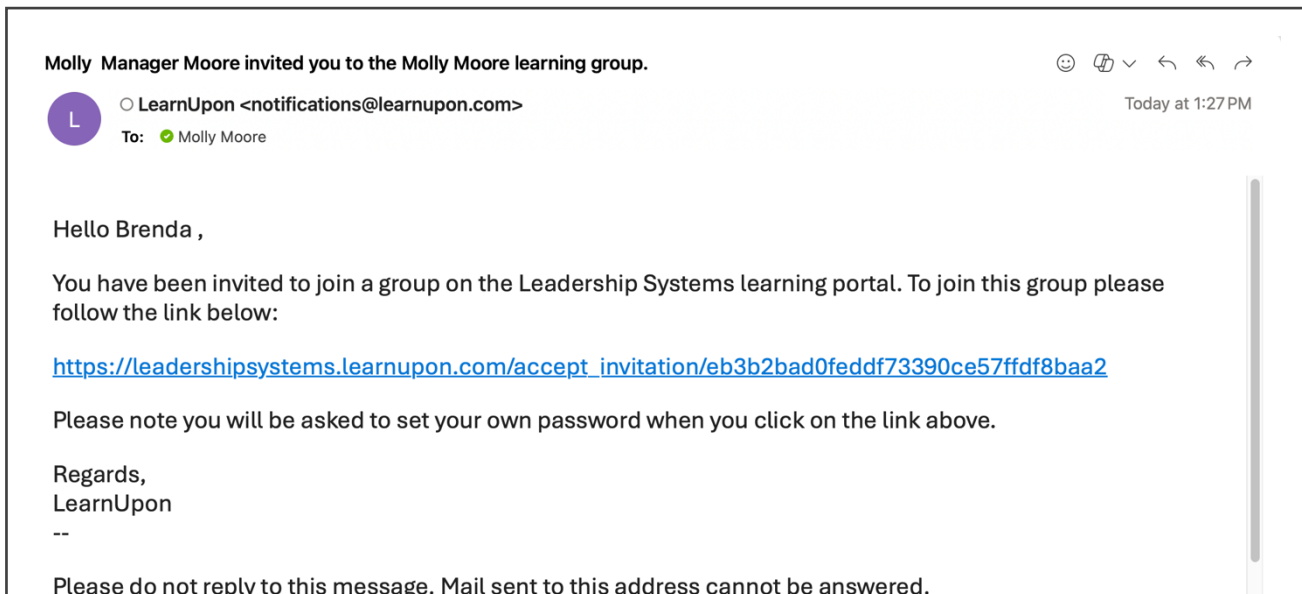
Once you have created a user, you will be able to see them in the “Pending Users” tab. They will stay in pending status until they have accepted the invitation to access the LMS. Once they have accepted the invitation, they will automatically move to the “Users” tab.

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You can resend the invitation or delete the user by selecting the 3 vertical dots on the right side of the row. You can also select “User not getting email?” if you would like to resend the invitation from your personal email address, not from LearnUpon.

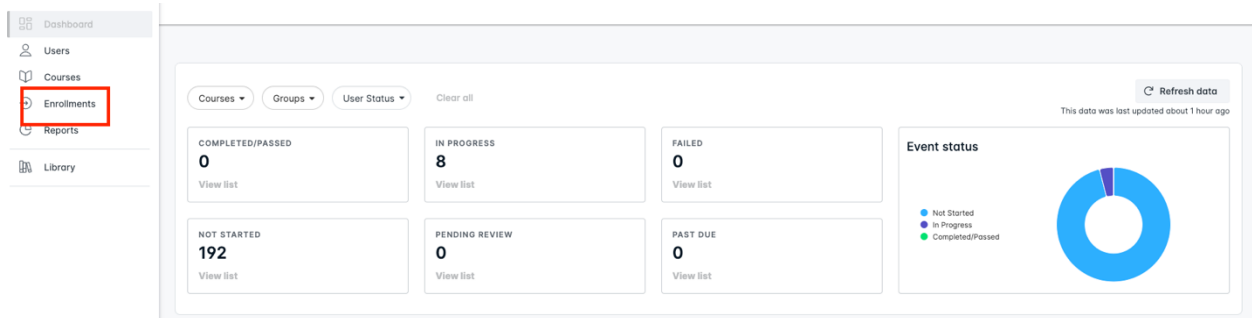


Below is an example of the email your client will receive once you have set them up as a user. They will then access the link and will be prompted to create a new password. Please note that the email will come from LearnUpon.

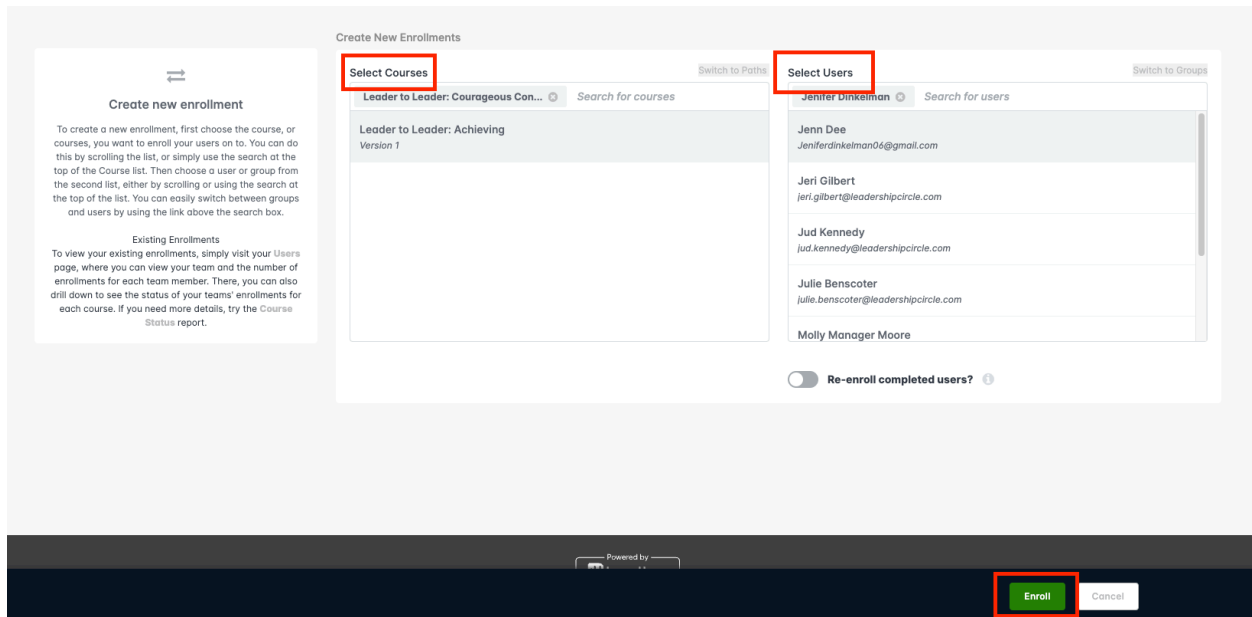


HOW TO ENROLL YOUR CLIENT INTO A NEW LEADER TO LEADER COURSE

From your Manager Dashboard, you will want to select the “Enrollments” option from the navigation bar to the left of your dashboard.



From there you will see the list of Leader to Leader course you have access to and your client list.



Select the course(s) and user(s) you would like to enroll then select the green “Enroll” button on the bottom of your screen. If you do not see it, you may need to scroll down. An email will be sent to your client letting them know that they have been enrolled in a course.

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Below is an example of the email your client will receive once you enroll them into a course. They will click on the link in the email to log into the LMS and access their course work.

Hello Molly Manager Moore,

You have been enrolled in the following course Leader to Leader: Courageous Conversations. To take this course please log on to

https://leadershipsystems.learnupon.com/users/sign_in

Regards,
LearnUpon

--

Please do not reply to this message. Mail sent to this address cannot be answered.

HOW TO MESSAGE YOUR CLIENTS FROM YOUR MANAGER DASHBOARD IN THE LMS

To message a client for the first time, you will need to access the appropriate “View list” field that corresponds to where your client is in their process.

The screenshot shows the top section of the LS Manager Dashboard. At the top, there are filters for 'Courses', 'Groups', and 'User Status', along with a 'Clear all' button and a 'Refresh data' button. Below the filters, there are six cards representing different event statuses: 'COMPLETED/PASSED' (0), 'IN PROGRESS' (8), 'FAILED' (0), 'NOT STARTED' (192), 'PENDING REVIEW' (0), and 'PAST DUE' (0). Each card has a 'View list' button. To the right of these cards is an 'Event status' donut chart with a legend: 'Not Started' (blue), 'In Progress' (purple), and 'Completed/Passed' (green). A note indicates 'This data was last updated 16 minutes ago'.

You can select any of the boxes depending on where your client maybe be in the Learning Journey process. You can use the filters above to narrow your search by Courses, Group (there will only be one group and that is yours) and User Status.

For this example, I am going to select the “In Progress” box to access all my users who have started a course.

The screenshot shows a list of clients in the LS Manager Dashboard. At the top, there are filters for 'Courses', 'Groups', and 'User status', along with a 'Clear all' button. Below the filters, there is a table with columns for 'Name', 'Course name', 'Due date', and 'Expiry date'. The first row is selected, and a 'Send message' button is highlighted with a red box. The table contains the following data:

Name	Course name	Due date	Expiry date
<input checked="" type="checkbox"/> JD Jenn Dee jeniferdinkelman06@gmail.com	Instructional Resources: Achieving v.1	-	-
<input type="checkbox"/> JD Jenifer Dinkelman jeniferdinkelman@gmail.com	Instructional Resources: Challenging Assumptions v.1	-	-
<input type="checkbox"/> JD Jenifer Dinkelman jeniferdinkelman@gmail.com	Instructional Resources: Fostering Resilience v.1	-	-
<input type="checkbox"/> JD Jenifer Dinkelman jeniferdinkelman@gmail.com	Instructional Resources: Foundational - Promise of Leadership- Required v.1	-	-

This will give a list of all your clients who have started a course. I can select the client or multiple clients by checking the box next their name and then selecting the “Send Message” box on the top righthand of the screen.

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This message box will pop up with a default message. You cannot edit the subject line, but you can edit the message if you would like. There is a 220-character max for the message box.

Send message ✕

Send message to 1 learners

Subject

Your enrollment to [COURSE NAME]

Message

Dear learner,

We would like to remind you to complete your training. Please click the link below to access your course.

[View message](#)

[Cancel](#) [Send](#)

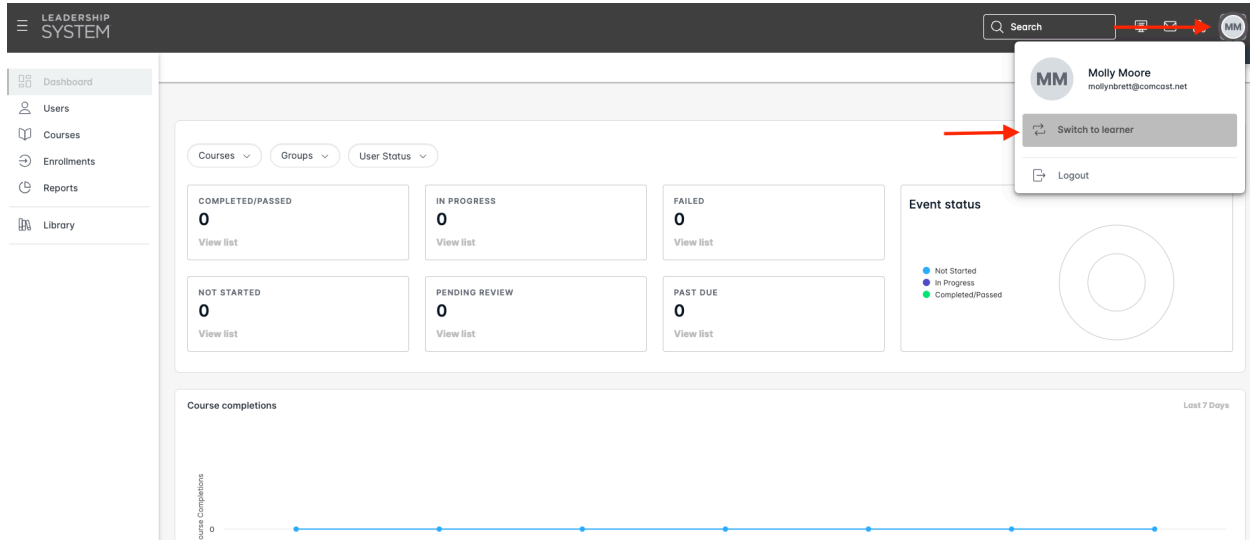
Once you have sent the initial email to your client, you will receive an inbox notification on your Manager Dashboard at the top right menu bar and you will receive an email to your inbox. You can access and manage your email correspondence from the envelope icon or your email inbox.

The screenshot shows the top navigation bar with a search bar and a notification icon (envelope with a red dot) highlighted by a red box. Below the navigation bar is the dashboard content area. It features a header with filters for Courses, Groups, and User Status, along with a 'Clear all' button and a 'Refresh data' button. The dashboard displays six cards for course status: COMPLETED/PASSED (0), IN PROGRESS (8), FAILED (0), NOT STARTED (192), PENDING REVIEW (0), and PAST DUE (0). Each card has a 'View list' link. To the right is an 'Event status' section with a donut chart and a legend: Not Started (blue), In Progress (purple), and Completed/Passed (green). A note indicates 'This data was last updated about 1 hour ago'.

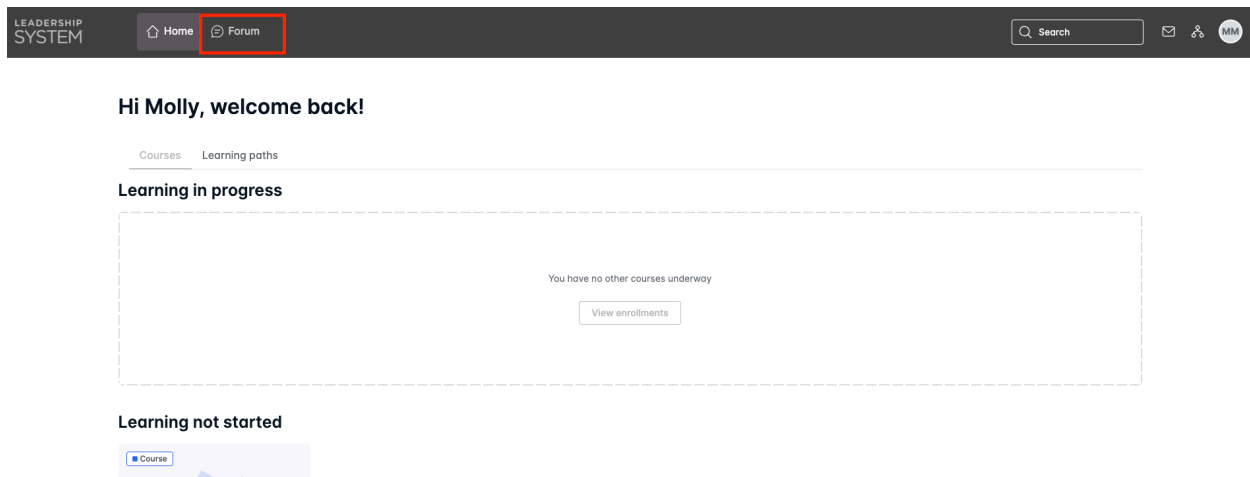
HOW TO USE FORUMS IN YOUR MANAGER DASHBOARD

When you first log into your Manager Dashboard you will NOT see “Forum” as an option on the dashboard. You will need to log in as a “learner” to have access to “Forums”.

Navigate over to your profile icon in the righthand corner, select ”Switch to learner” from the dropdown.



You will see “Forum” on the top menu bar. Select that to administer the forums for your clients.



The Forum tab in LearnUpon allows learners (your clients) and instructors (you) to engage in discussions related to course content. Key features include:

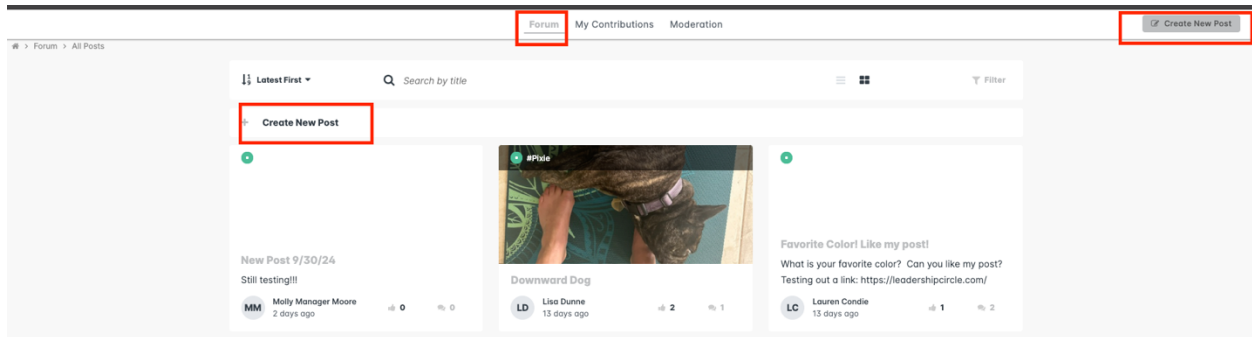
1. Discussion Threads: Users can start or reply to threads about various topics.

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2. Topic Organization: Discussions are categorized for easy navigation.
3. Q&A: Learners can ask questions, and both peers and instructors can provide answers.
4. Resource Sharing: Users can share links and documents to enhance learning.
5. Notifications: Users can receive updates on replies and discussions.
6. Instructor Engagement: Instructors can monitor and guide discussions.
- Community Building: Forums foster connections and support among learners.

Overall, the Forum tab enhances interaction and collaboration within the LMS platform.

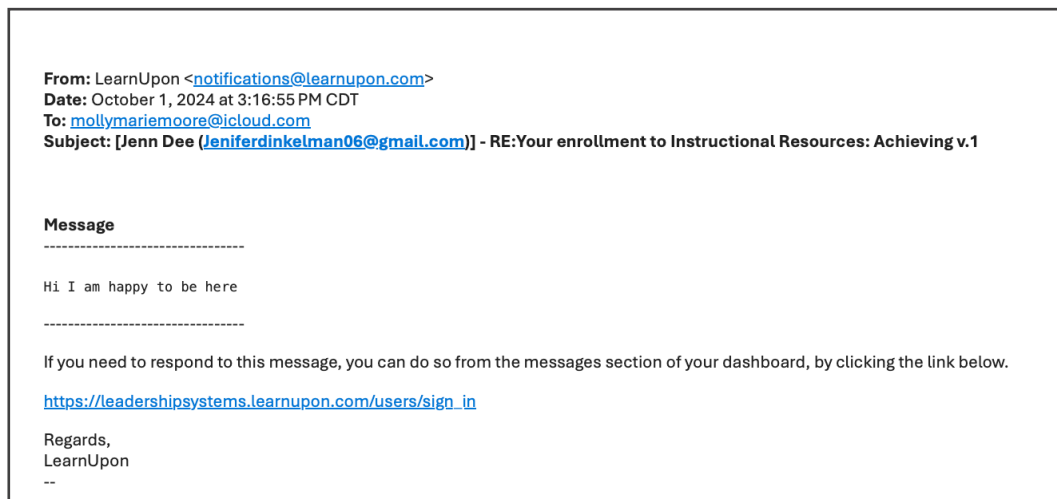
Once you are on the “Forums” page, you will have access to existing posts as well as be able to create a new post by selecting either of the two “Create New Post” buttons. You can go into a post and add a new comment as well as give it a thumbs up.



EMAILING WITH YOUR CLIENT REGARDING THEIR REFLECTION ASSIGNMENTS

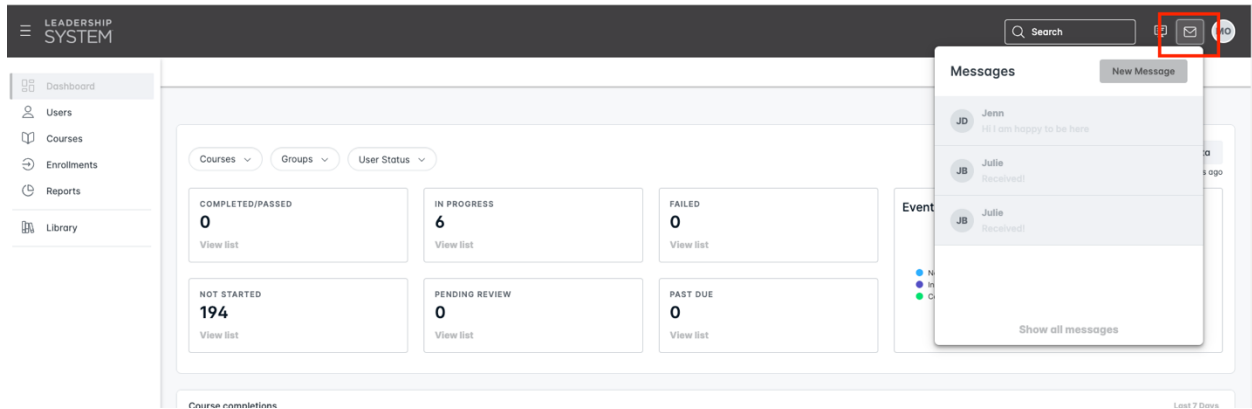
Your clients will be working on several reflection activities throughout their Leader to Leader courses. These activities were created to help your clients dive deeper into their development journey. They will be taking time throughout their courses to comment and reflect on their experiences, set intentions and deepen their understanding of their leadership potential.

When your client completes a reflection and hits the “Submit” button, you will receive an email alerting you to their completion.

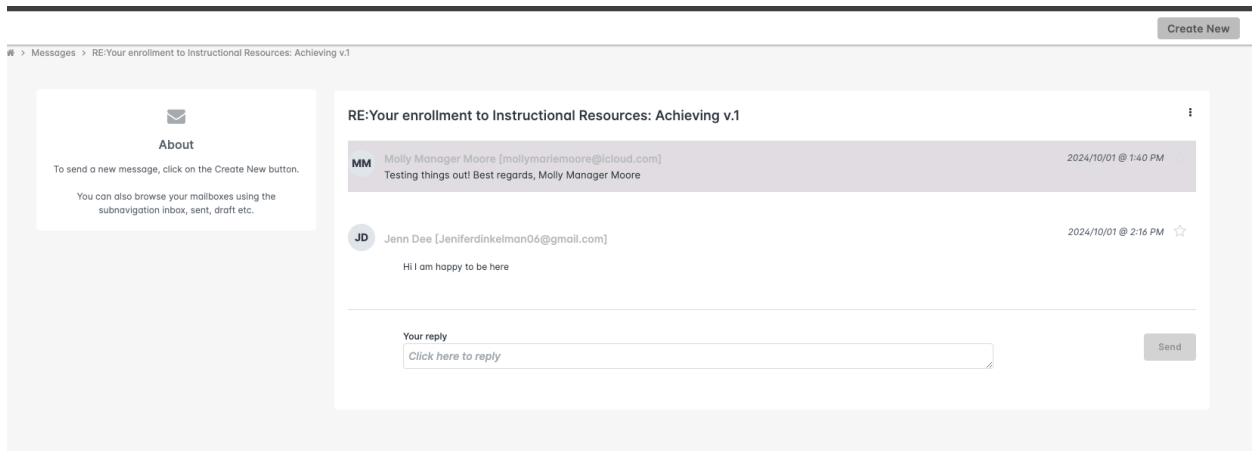


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You can select the link to log into the LMS from the email. This will take you to your Manager Dashboard. From here, select the envelope icon on the top right corner of your screen. You will see a drop down of all messages in your inbox. Select the message from your client.

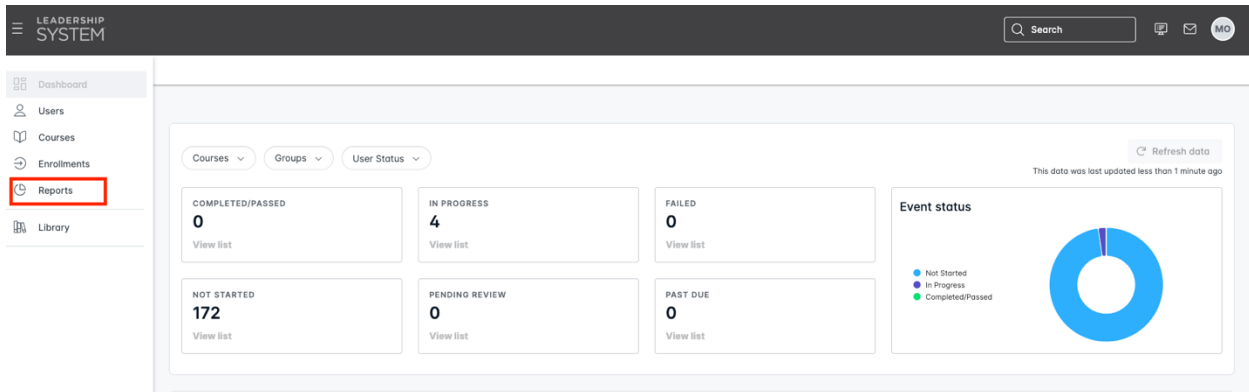


This will open a message regarding the completed reflective assignment. You can read it and comment on it. There will be a continuous message string of the conversation.

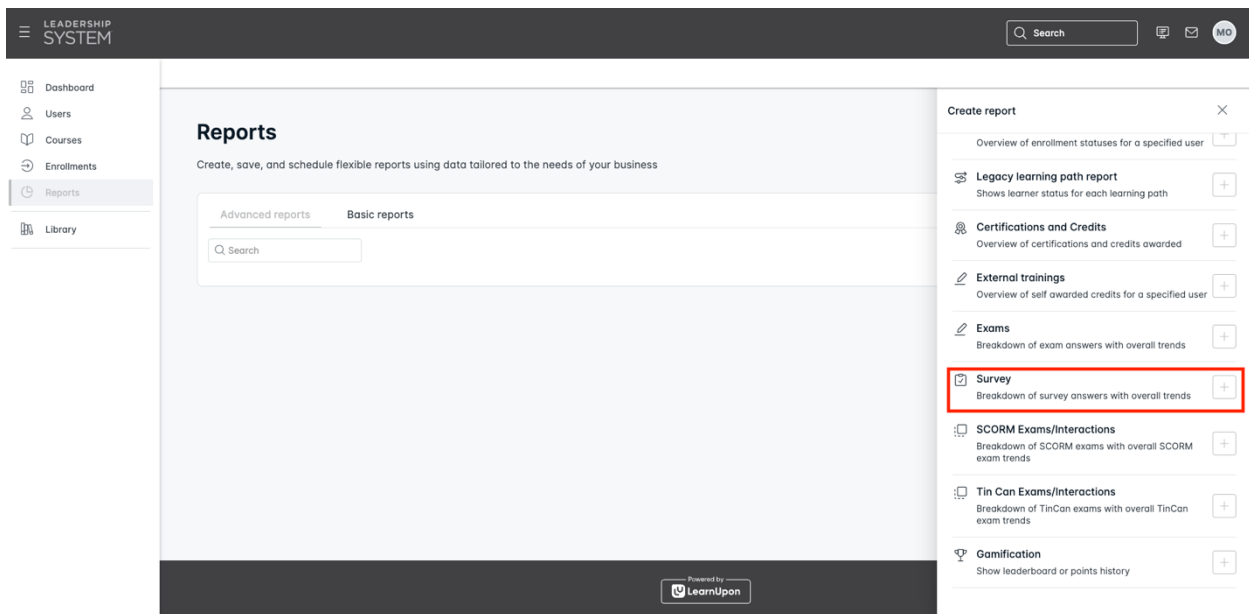


ACCESSING YOUR CLIENT'S REFLECTION ASSIGNMENTS VIA REPORTS

To access reflective assignments through the reporting function, select the “Reports” tab on the left side navigation bar.



From there select the “Create report” button on the right side of the page. Scroll down until you find “Survey”. Click the + button on the right.



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You will select the “Report Type” as Surveys and “Output Format” as Transcripts. Think of the surveys as reflective assignments rather than a survey. It is the means at which your client can complete an assignment and then you will be able to access their work and respond via a message.

From there you can search for a single user by searching for them in the “User” field or search for all users by leaving the field blank. You can also search by a specific timeframe.

The screenshot shows the LS Manager Dashboard with the 'Reports' section active. On the left is a navigation menu with options: Dashboard, Users, Courses, Enrollments, Reports (selected), Forum, and Library. The main content area is titled 'Reports Tips' and contains instructions on how to use the report type and export options. Below this is the 'Filters' section, which is highlighted with a red box. It includes dropdown menus for 'Report Type' (set to 'Surveys') and 'Output Format' (set to 'Transcripts'). There are also search fields for 'User', 'Courses', and 'Groups'. The 'User' field has a placeholder 'Search by firstname, lastname, email'. The 'Courses' field has a placeholder 'Search by course name'. The 'Groups' field has a placeholder 'Molly Moore'. Below the search fields are checkboxes for 'User Status' (Login enabled, Login disabled) and 'User Type' (Learner, Admin, Instructor). At the bottom of the page, there is a dark blue bar with several buttons: 'Run Report' (highlighted with a red box), 'Reset Filters', 'Export to CSV', and 'Export to PDF'.

Once you have populated the fields, you can select “Run Report”. Your report will pop up to simply view or you may export it into an Excel, PDF or CSV file.