



Learn

Manager user guide model

Personalising this guide for your organisation

This user guide is intended as a model for Kallidus customers to update according to their own internal processes. Please ensure that you read through it thoroughly and edit to suit your organisation and processes. The layout and design of this document has been deliberately kept plain and simple so that you are able to add your own branding to add your preferred style.

- Consider your audience – would more detailed or simplified instructions work better for them?
- Edit the language to suit your company tone of voice
- Change the term ‘Learn’ to the system name you will be using internally
- Add your company logo and use your company branding, colours or standard layouts
- Replace screenshots with imagery from your own system so that the branding and functions displayed match what your managers will see. You may want to use a test user account with manager access for this.



Personalising this guide for your organisation

This user guide is intended as a model for Kallidus customers to update according to their own internal processes. Please ensure that you read through it thoroughly and edit to suit your organisation and processes. The layout and design of this document has been deliberately kept plain and simple so that you are able to add your own branding to add your preferred style.

- Delete functions or features that you are not planning to use from the contents list and appropriate slides
- The FAQ/Contacts slide at the end of this document will need to be updated according to your organisational processes
- When you are happy with the wording and layout of the guide, save it as a PDF to send out to your managers as part of your communications.
- **Please remember to remove these instructional slides before saving as PDF and providing to your users**

Learn: Manager Guide

Contents:

- Home – My Team dashboard
- My Team – Functions
 - Team summary
 - Mandatory training
 - Instructor-led training
 - Top learners
 - Competency checks
- Senior manager view
- FAQ & Contacts

The screenshot displays the Kallidus Manager Dashboard for user Emily Smith. The interface includes a navigation bar at the top with the Kallidus logo, home link, and search functionality. The main content area is divided into several sections:

- Profile Section:** Features a profile card for Emily Smith with a placeholder for her picture and a 'My bookings' section indicating no bookings.
- Accreditations:** Shows '0/1 Accreditations complete 0%' with a 'View accreditations' button.
- Course Progress Metrics:** Three cards provide a summary: 'You've got 5 courses left to do', 'You've done 29% of the courses you have to do', and 'You've done about 20m of learning in the last 12 months'. A 'Go to my courses' button is present.
- Team Performance:** A 'My team' section includes a 'Go to my team' button and three sub-cards: 'Your team has done 31% of the courses they have to do' (with a 'See all' button), a 'Training calendar' for January 2023 showing training days, and 'Your team's added 45m of learning in the last' (with a 'See team leaderboard' button and time range filters for 1m, 3m, and 12m).

Home – My Team Dashboard

On the home page of Learn you will find the *My team* dashboard.

This dashboard shows a brief overview of your team's current status and progress.

It includes a calendar of upcoming bookings for your team. Dates are colour coded based on how many of you team members are booked to attend an event on each day. Select the colour coded dates to find more information.

You can also see how much time your team has spent learning within the last month, 3 months or 12 months by changing the date range.

Quickly access more detail or take action by selecting the buttons here to take you to the full set of *My team* functions.

The screenshot displays the Kallidus Home – My Team Dashboard. The top navigation bar includes the Kallidus logo, a 'Home' button (highlighted with a red box), and links for 'My courses', 'All courses', 'Add my learning', and 'My team'. A search bar and user profile 'ES' are also visible.

The main dashboard area is divided into several sections:

- User Profile:** Shows a profile picture placeholder for 'Emily Smith' and a 'My bookings' section indicating 'You don't have any bookings'.
- Personal Progress:** Greeting 'Hello, Emily', '0/1 Accreditations complete 0%' with a 'View accreditations' button.
- Team Overview:** Three cards showing: 'You've got 5 courses left to do', 'You've done 29% of the courses you have to do', and 'You've done about 20m of learning in the last 12 months'. A 'Go to my courses' button is below.
- My team (highlighted with a red box):**
 - 'Your team has done 31% of the courses they have to do' with a 'See all' button.
 - 'When's my team booked on training?' section for January 2023, featuring a training calendar where the 20th is highlighted in green. A key indicates 1 (green), 2 (yellow), and 3+ (red).
 - 'Your team's added 30m of learning in the last' section with a date range selector (1m, 3m, 12m) and a 'See team leaderboard' button.

My Team functions: Team Summary

Access a full summary of your team members' learning by selecting *My team* from the ribbon along the top of any screen in Learn.

Here you will see an overview of each of your team members' mandatory learning status.

Select the name of a team member to see more detailed information and to *Give Kudos* to learners that are doing well.

My team

Team summary | Mandatory training | Instructor-led training | Top learners | Competency checks

Sort by: A-Z | Overdue | Total time remaining

Team members

Mandatory training at this time

Next mandatory deadline

Tom Jones
L&D Administrator

1 Overdue courses

0/1 Accreditations

9 Courses they have to do

2007 hrs Still to do

Nov 9 68 days overdue

Give kudos

Accreditation	Expiry date	Status	Last completed
Tom has no accreditations to do			

9 Courses they have to do | 1 Courses they chose to do | 6 Courses they have done | 0 Other learning added

Courses they have to do	Due	Status	Complete
Accounting basics	09/11/2022	Not started	Overdue
Test deadline change for 1 person (SR)	13/01/2023	Not started	Overdue
Allergy Awareness	-	Not started	-
Example Course	-	Not started	-
Function test (SR)	-	Not started	-

See all...

Courses they have chosen to do	Due	Status	Complete
Kallidus SCORM 1.2 Tracking Example	12/01/2023	In progress	Overdue

Tom's completed learning

Courses they have done:	Mandatory	Due	Complete	Score
Elective test - instructor led	●	-	20/01/2023	✓-
Elective test	●	-	11/01/2023	✓-
Test document	●	-	13/12/2022	✓-
Asking The Right Questions Module	●	-	12/12/2022	✓-

My Team functions: Mandatory Training

In the *Mandatory training* tab, you will find all courses that have been assigned as mandatory for your team with a quick view of how close your team are to full compliance and which team members have not yet completed the course.

Use the *See all* and *Send reminder* buttons to keep track of anything outstanding and to remind your team to complete these courses.

The screenshot shows the Kallidus interface with the 'My team' tab selected. Under the 'Mandatory training' sub-tab, three courses are listed:

- Accounting basics:** earliest due date is 9 November 2022. 100% left to do. 1 person hasn't completed this course yet. Buttons: See all, Send reminder.
- Test deadline change for 1 person (SR):** earliest due date is 13 January 2023. 100% left to do. 1 person hasn't completed this course yet. Buttons: See all, Send reminder.
- Allergy Awareness:** no deadline set. 100% left to do. 1 person hasn't completed this course yet. Buttons: See all, Send reminder.

This modal window is titled 'Accounting basics' and contains the text: 'The following 1 people haven't completed this course yet'. Below this, a card for 'Tom Jones' is shown with a profile picture containing the initials 'TJ' and the label 'Overdue' in red.

This modal window is titled 'You're about to remind the following people about Accounting basics'. It shows a preview of the reminder message to Tom Jones (TJ):

Hi {First name},

A quick reminder that you need to complete Accounting basics.

You have until {Course deadline} to complete it.

Here is a link to the course: [Accounting basics](#)

Thanks,
Emily

Note: {First name} and {Course deadline} will be completed by the system to fill in each person you are reminding. Please do not change or delete these.

Buttons: Cancel, Send

My Team functions: Instructor-led Training

Kallidus Home My courses All courses Add my learning My team Search courses... [Search] [Notifications] [ES]

My team

Team summary Mandatory training **Instructor-led training** Top learners Competency checks

3 Unbooked instructor-led training

1 Upcoming bookings

Unbooked instructor-led training (3)

These are the instructor-led training that team members need to be booked onto for their current courses.

You can make as many bookings as you like. However, you can only book up to 20 team members per booking.

Example Instructor-led lesson

1 date available

Make booking

Kallidus Home My courses All courses Add my learning My team Search courses... [Search] [Notifications] [ES]

Example Instructor-led lesson

1 Select date

2 Select team members

3 Summary

Step 1 of 3: Select date

Next >

Kallidus Home My courses All courses Add my learning My team Search courses... [Search] [Notifications] [ES]

Book onto Example Instructor-led lesson

< Previous

Next >

Step 2 of 3: Select team members

✓ Select date
Tuesday 24 January 2023
9:00am - 10:00am

2 Select team members

3 Summary

Kallidus Home My courses All courses Add my learning My team Search courses... [Search] [Notifications] [ES]

Book onto Example Instructor-led lesson

< Previous

Confirm

Step 3 of 3: Summary

You have selected to book the following team members for:

Example Instructor-led lesson
Tuesday 24 January 2023
9:00am - 10:00am

✓ Select date
Tuesday 24 January 2023
9:00am - 10:00am

✓ Select team members
1 team member selected

3 Summary

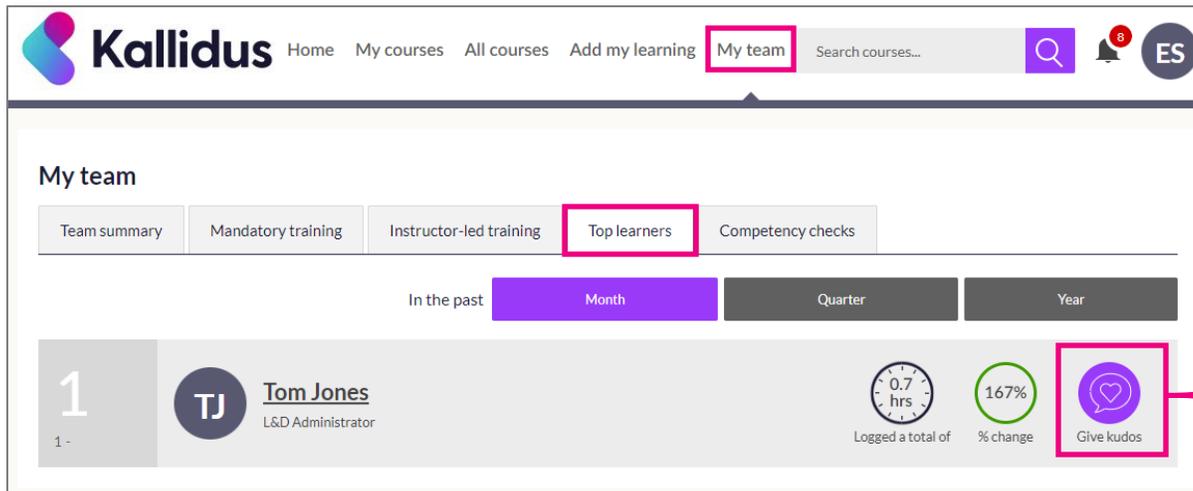
The *Instructor-led training* tab allows you to view any upcoming event bookings for your team as well as mandatory courses for which they do not currently have a booking.

You can make a booking on behalf of your team member here by selecting the *Make booking* button and following the simple 3-step process.

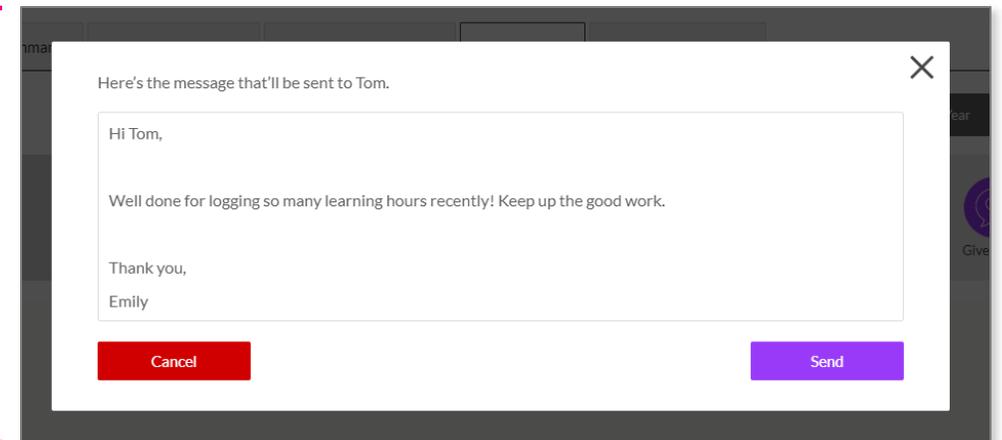
My Team functions: Top Learners

In the *Top learners* tab, you will find details of the top learners in your team. This is based on amount of time spent learning and how much progress they have made. You can expand the time frame you are looking at from the past month to the past quarter or year.

Use the easy access *Give kudos* button here to send a message to your top learners and praise them for their hard work. There is a standard message available which can be edited to give a personal touch.



The screenshot shows the Kallidus user interface. At the top, the navigation bar includes 'Home', 'My courses', 'All courses', 'Add my learning', and 'My team' (highlighted with a pink box). Below this, the 'My team' section has tabs for 'Team summary', 'Mandatory training', 'Instructor-led training', 'Top learners' (highlighted with a pink box), and 'Competency checks'. Under the 'Top learners' tab, there are filters for 'In the past' with options 'Month' (highlighted with a pink box), 'Quarter', and 'Year'. The main content area displays a card for 'Tom Jones', L&D Administrator, with a rank of '1'. It shows '0.7 hrs' logged and a '167%' change. A 'Give kudos' button (highlighted with a pink box) is located at the bottom right of the card.



The screenshot shows a dialog box titled 'Here's the message that'll be sent to Tom.' with a close button (X) in the top right corner. The message content is: 'Hi Tom, Well done for logging so many learning hours recently! Keep up the good work. Thank you, Emily'. At the bottom, there are two buttons: 'Cancel' (red) and 'Send' (purple).

My Team functions: Competency Checks

A competency check is an assessment of whether a team member is able to complete a specified task competently, and within our company guidelines. If a competency check is required, you can mark the result as a pass or fail in the *Competency checks* tab once you have observed the task being carried out.

Please ensure that you read the guidelines available before deciding whether your team member has passed or failed.

Kallidus Home My courses All courses Add my learning My team Search courses... ES

My team

Team summary Mandatory training Instructor-led training Top learners Competency checks

Competency checks to do (1)

TJ Tom J. Making a cup of tea Start check

Close

Competency check Making a cup of tea

TJ Tom Jones Status: Not started

Task: How well did they make a cup of tea

- did they boil the kettle
- what was the consistency like

Provide a result: Fail Pass Submit

Senior Manager View

If someone in your team has their own direct reports, you can look at a summary of their learning progress in the *Team summary* tab by changing the *View by* drop down from Direct reports to Teams.

From here you can drill down into any teams that you are indirectly responsible for via managers in your own team.

As you move down the hierarchy, the breadcrumb shown below can help you keep track of which team you are looking at.

The screenshot shows the 'My team' dashboard in the Kallidus system. The 'My team' tab is selected in the top navigation. Below it, the 'View by' dropdown menu is set to 'Teams'. The dashboard displays a summary for the team 'Emily.Smith', showing 1/1 accreditations complete and 38% courses complete. A red arrow points from the 'View by' dropdown to the detailed view of the team member 'Emily.Smith' in the second screenshot.

The screenshot shows the detailed view of the team member 'Emily.Smith' in the Kallidus system. The breadcrumb navigation shows 'My team > Emily.Smith'. The dashboard displays a summary for the team member 'Emily.Smith', showing 5 courses they have to do, 1 hour still to do, and 68 days overdue for mandatory training. The dashboard also displays a summary for the team member 'Tom Jones', showing 1/1 accreditations complete, 8 courses they have to do, 2006 hours still to do, and 3 days overdue for mandatory training.

FAQ & Contacts

Question	Answer	Question	Answer
How do I arrange an account for my New Starter?		How do contractors access the LMS?	
My team members are not appearing on my dashboard, who should I contact?		Where are LMS emails/reminders sent?	
The members of my team are not correct, who should I contact?		For what purposes is personal data processed and stored?	
How are my team's learning requirements populated?		What happens if a member of my team is on Long Term Sickness?	
What happens to my team member's learning when they change job role?		I am experiencing issues with the system being slow, who should I contact?	
My team member has taken an eLearning course and it is not showing as complete/passed, who should I contact?		Can my team members be exempt from any mandatory training?	
My team member is experiencing issues with Single Sign On, who should I contact?		How does my team access the LMS from home?	

For any queries not listed above please contact: