



Manager Dashboard

Manager Dashboard – Manage a Course on Behalf of an Employee

28/08/2020



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Overview

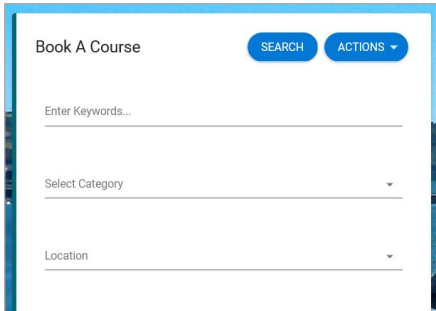
As well as booking courses for themselves, Managers have the option to book an employee on to a course on their behalf.



Book a Course on Behalf of an Employee

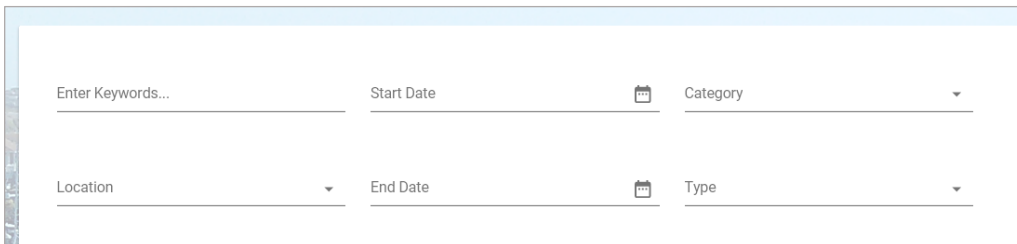
How to book a course

1. Search for an available course by using any combination of the search fields on the 'Book A Course' widget.
 - **Enter Keywords...:** Type some words relevant to the course.
 - **Select Category:** Choose a category in which a suitable course might belong.
 - **Location:** If you know the location (room) of the course you wish to book, select it here.



The screenshot shows a 'Book A Course' widget with a title bar containing 'Book A Course', a 'SEARCH' button, and an 'ACTIONS' dropdown menu. Below the title bar are three search fields: 'Enter Keywords...' (a text input field), 'Select Category' (a dropdown menu), and 'Location' (a dropdown menu).

2. Click the 'SEARCH' button to view the search results. (To see all courses, click the search button without entering any of the search fields).
3. For a more precise search, use the additional search fields on this screen.
 - **Start Date:** The course start date.
 - **End Date:** The course end date.
 - **Type:** Choose one of these two options.
 - i. **Scheduled** – The course has upcoming dates scheduled.
 - ii. **Unscheduled** – There are no dates currently scheduled for this course.



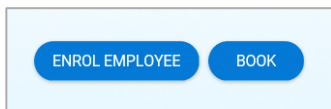
The screenshot shows the search widget with four additional search fields: 'Start Date' (with a calendar icon), 'Category' (with a dropdown arrow), 'End Date' (with a calendar icon), and 'Type' (with a dropdown arrow). The 'Enter Keywords...' and 'Location' fields are also visible.

4. Click 'APPLY' to update the search.
5. Once you have found the course you wish to book for your employee, click the ellipsis icon and select 'View Course Details'. This will give you an overview of the course and show you the dates available for booking. On the course details screen there will be an ID number linked to each course, you may need to make a note of the ID number if there are multiple courses on the same date.

You can also skip to step 7 by clicking 'Enrol employees on course'.

Plymouth	Health and Safety	No scheduled courses	⋮
DELT	Health and Safety	No scheduled courses	⋮
DELT	Health and Safety	No scheduled courses	⋮
Build a wall with no cement	Compliance	No scheduled courses	⋮
DELT	HR Essentials	No scheduled courses	⋮
DELT	Leadership Development	No scheduled courses	⋮
zzz	HR Essentials	No scheduled courses	⋮

6. After reading the details, click 'Enrol Employee' to open the course booking screen.



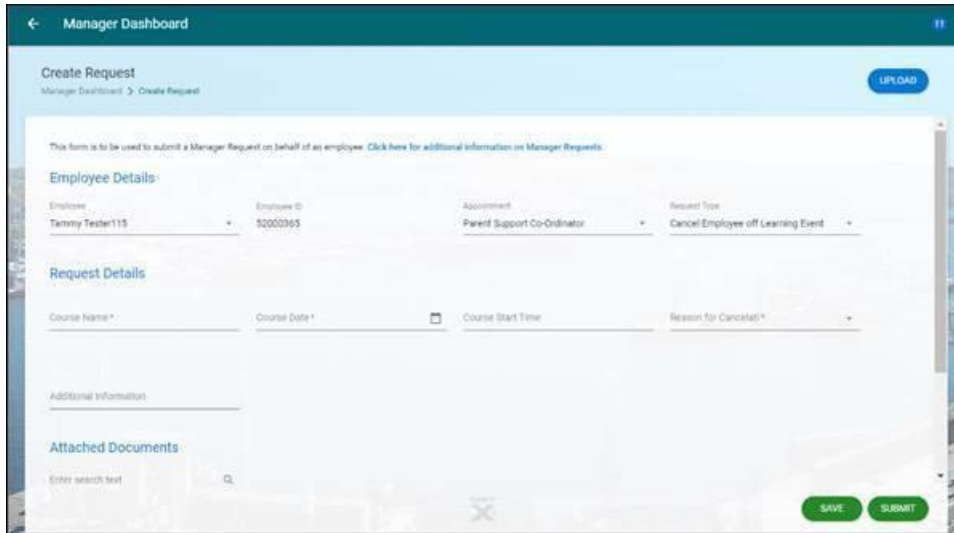
7. Select the course date you wish to book. If there are multiple courses on the same date, use the ID number from the course details screen to identify the correct course. If there is not a suitable date or there are no dates available, you can add the employee to the waiting list – look for 'Add to waiting list' in the Scheduled Dates column.
8. Select an Employee
- **Employee:** The name of the employee you are booking the course for.
 - **Reason:** The reason the employee wants to take this course.
 - **Comments:** Extra information to support the booking.
9. Click SUBMIT to make the booking. The employee can then track the status of this booking from the 'My Training History' widget.

Cancel a Course on Behalf of an Employee

How to cancel a course

1. If an employee can no longer attend a training course, they should cancel the booking at the earliest opportunity. If they are not able to do this themselves a request can be made by the manager within the system. To do this you will need the course name, date and start time.
2. Navigate to the Manager Dashboard and locate the Manager Request widget. Click 'CREATE REQUEST'.
3. Select the employee from the list, then select their appointment.
4. Choose the request type 'Cancel Employee off Learning Event' or 'Waiting List' as appropriate.
5. Enter the Course name, Course Date and Start time.
6. Select the Reason for Cancellation from the list.

7. Click SUBMIT to request the cancellation. You will be notified on the system once this has been actioned.

A screenshot of a web application interface titled "Manager Dashboard" with a sub-header "Create Request". The page includes a breadcrumb "Manager Dashboard > Create Request" and an "UPLOAD" button. A note states: "This form is to be used to submit a Manager Request on behalf of an employee. Click here for additional information on Manager Requests." The form is divided into three sections: "Employee Details" with fields for Employee (Tammy Tester115), Employee ID (52000365), Appointment (Parent Support Co-Ordinator), and Request Type (Cancel Employee off Learning Event); "Request Details" with fields for Course Name, Course Date, Course Start Time, and Reason for Cancellation; and "Additional Information" with a text input field. At the bottom, there is an "Attached Documents" section with a search bar and a "SAVE" button, and a "SUBMIT" button at the bottom right.