Manager Mode: User Guide
Manager mode and the Manager Dashboard provide managers with training and performance-related information for a group of users in the Workgroup View. Managers can also view an individual user's details by Emulating a particular user. Managers can register and/or assign staff for training on an individual and group level.

Topics:
- Exploring the Manager Dashboard
- Viewing Exception Reports
- Exploring an Individual's View
- Registering an Individual User or Group of Users for Training
- Managing Training Assignments
- Training Assignment Impacts on Notifications
- Registering vs. Assigning
- Signing Out

Exploring the Manager Dashboard:
You can view progress of an entire workgroup on the Manager Dashboard. From the home screen, click on the Manager Dashboard button and your page will look like this.

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Depending on the settings made by the administrator, the Manager home page displays:

**Exception Reports:** Exception Reports give the manager information about the overall progress of a user's assigned activities. You can view two exception reports:

- Exception reports by user: shows users who have not completed assigned learning activities
- Exception reports by activity: shows a list of learning activities with the progress that users have made towards completion

**Note:** An activity displays as incomplete if the expiration date has passed. Inactive activities are not shown.

Refer to the following section for more information on exception reports.

**Viewing Exception Reports:**

**Note –** exception reports pull from a student’s assigned activities.

The Exception Report section provides a graphical representation of a user's progress towards completion in terms of percent complete. You can quickly glance at the numbers to get an overview of the progress users have made. You can also get a more detailed report by tracking the progress of users for child activities within assigned activities.

**Note:** The progress of a user towards completion of an assigned training is calculated based on settings an administrator has configured for the user.

▶ To view an exception report by user for learning activities:

You can view exception reports for either direct reports or for all viewable users (direct reports and other users). To view an exception report for all viewable users, select **All Viewable Users** from the display drop-down list.
If you wish to see a detailed view of progress a particular user, click the blue “x Incomplete” button for that user. You can view details of progress the user makes on each assigned activity. You can also expand activity structures to view the completion status of each child activity, as shown below.

You can now easily see all activities that have yet to be completed by this user. Click the export icon to export to Excel.

► To view an exception report by activity

From the Exception Report window, you can also search assignments by clicking on the Activities tab.

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You can use the search bar to locate a specific course. Once you have found the course, click on the blue Users button.

You can now easily see all users who have yet to complete this assignment. Click the export icon to export to Excel.

### Exploring an Individual’s View:

Emulating an employee allows you to see what they see in CPD Online. There are two ways to reach emulation mode.

**► Emulating Employees Through My Team:**

If you are searching for one of your direct reports, this might be the easiest way to emulate someone.

1. Click on the **My Team** logo then **My Team**.

2. Find the employee and click on the **Quick Links** dropdown. Select **Emulate Employee**.

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3. You are now in Emulation Mode and seeing what your report sees.
4. To return to your own view, click the Emulation Mode icon and then Exit Emulation.

► Emulating Employees Through Universal Search:

If you have a lot of employees in your team, or if you are searching for someone who is not one of your reports, it may be easier to emulate someone this way.

1. Click on the Universal Search logo.

2. Enter the name in the search box. Find the employee and click on the Preview dropdown. Select Emulate Employee.
3. You are now in Emulation Mode and seeing what this person sees.
4. To return to your own view, click the Emulation Mode icon and then Exit Emulation.

► To view a managed user’s training schedule:

1. From the Manager Dashboard, find the desired user’s record and select Training Schedule from the dropdown box next to the Profile button.
2. You are now in Emulation Mode and seeing what your report sees.

   You can select buttons at the top to see:
   • Current/Upcoming registrations
   • Completed or Canceled registrations
   • Current, Upcoming, Completed, and Cancelled activities
   • Waiting List or pending approval
3. Click the Emulation Mode button to access other information or to Exit Emulation.

► To view a learner’s time or exam response

1. From the Manager Dashboard, find the desired user’s record and select Training Schedule from the dropdown box next to the Profile button.
2. You are now in Emulation Mode and seeing what your report sees.
3. Click on Completed Activities.
4. Locate the exam to view. Then click the dropdown button next to Options and select View Progress Details.

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5. You will now see the learning activity progress detail page. To view detailed interaction data, click the small blue icon right above the OK button.
6. You will now see the exam responses or “interaction data.”
7. Click the Emulation Mode button to access other information or to Exit Emulation.

► To view a managed user’s training transcript:

1. From the Manager Dashboard, find the desired user’s record and select Training Transcript from the dropdown box next to the Profile button.
2. You are now in Emulation Mode and seeing what your report sees.
3. [Optional] Click the Print button or the Export to PDF button in the upper right corner.
4. Click the Emulation Mode button to access other information or to Exit Emulation.

Registering an Individual User or Group of Users for Training:
With the appropriate permissions, you can register users for learning activities individually or in a group or "batch".

1. Click on the Universal Search icon in the top toolbar and enter the name of the activity you want to register others for.
2. You can also browse through the available categories in the Library to locate the activity by clicking on the Library icon in the top toolbar.
3. On the blue Select button, click the dropdown arrow and select Register Others.
4. Select the activity and click Continue.
5. Click Add under Available Users, then select the users by selecting the check boxes next to the user names or by clicking Select all.
6. Add users to Registration or Waiting List, if necessary.
7. Click Submit to complete the registration process.

Managing Training Assignments:
Managers can control training assignments for their direct reports and viewable users. They can assign learners to training from the Universal Search results page or assign training to a specific user from the Exception Reports page.

Managers can set training assignments in the following ways:

► Adding Assignments

When adding assignments, you may recommend or require an activity, set the due date, set a priority level, and the assignment status (assigned, waived, or not applicable).

To Batch Assign:

1. Search for the activity you want to assign to others.
2. Click on the title of the course you want.
3. In the dropdown next to the Register button, select Manage Assignments.
4. Click Add to assign users to this activity.
5. Select users you want to assign the activity to. Once users have been selected, click Next at the bottom of the screen.

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6. Define assignment options for all students (you can select all and apply the same assignment options to all users). Click Apply to Selection.

7. Click Done.

You will not be able to reassign a learner to a training activity already assigned by another manager.

Note: Certain assignments you make by assigning users to a specific training will not show up on the Exception Report by User page and Exception Report by Activity page and will not be tracked if the Hidden from Manager dashboard option is selected for the training in the Learning Activity Properties page.

► Editing Assignments

When editing training assignments, you may realize that you cannot change some options because the selected users have a mix of indirect and direct assignments (assignments that have been added by you and other managers or administrators). The permissions you have determine the assignment options that are available for you to edit.

1. From the Manager Dashboard, find the Learner either by scrolling or searching their name and click on the blue button "X Incomplete."
2. Click once on the desired activity to select it and pull down the Other Actions tab to either Edit the assignment details or Remove the assignment for that learner.
3. TO EDIT AN ASSIGNMENT: Go to other actions and select Edit Assignment. Adjust the criteria for this specific assignment for the individual. Click Done when finished.
   *To Reassign an activity check the "Ignore Previous Completions" option*
4. TO REMOVE AN ACTIVITY: Go to other actions and select Remove Assignment. Select OK when asked if you are sure that you want to remove the activity.
   *Note: changes may not be visible on the manager's view of the exception report until the next day.*
5. TO WAIVE AN ASSIGNMENT: Use the Assignment Status box to locate the assigned activity that you want to remove.
6. Select the activity by clicking on the appropriate line to highlight. Then in the Other Actions menu, select Edit Assignment.
7. This will open the window for you to edit the assignment for this Learner. To mark the assignment as Waived- meaning no longer an active assignment- edit the Status from Assigned to Waived. You will need to record a reason for the status change, for example: "Already completed".
8. Click Done to process.

To Batch Cancel an Assignment

1. From the Manager Dashboard, click on Activities.
2. Click on the title of the course you want to cancel.
3. In the drop down next to the Register button, select Manage Assignments.
   *Note - By default the view shows direct reports registered for the activity. If desired, you can change this view to "all viewable users".
4. Checkbox the users you want to remove, then click the Remove button.
5. A warning box will pop up, click the OK button.

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6. You will see confirmation of the removal.

**Training Assignment Impacts on Notifications:**
When you assign users to a learning activity, these users receive the Learning Activity Assignment notification. On removing users assigned to a learning activity, they then receive the Learning Activity Removal Notification. When you assign users who are not part of the available audience to an activity and move the activity to production, the activity owner receives the Learning Activity Warning Notification.

While assigning users to a learning activity, you can specify a due date for activity completion and schedule the Learning Activity Assignment Reminder notification to remind users of the pending due date. Users who do not complete the assigned activity within the specified due date receive the Learning Activity Assignment Overdue notification. When you update the due date of an assigned activity, assigned users receive the Learning Activity Assignment Change notification.

**Registering vs. Assigning:**
Registering users is just that – registering them for the activities that they will take in CPD Online. This can be done individually (select a user, then register them for each activity you want them to take) or by batch registration (registering multiple users for a learning activity). Note: students can also register themselves for training.

Assigning training is creating an expectation for the user to register for and complete a learning activity and can be tied to due dates, given a priority level, and ties into the exception report.

The manager or administrator can both assign and register staff for their training if they don’t want the student to take the registration step on their own, and still wants their training tied to due dates and/or the exception report.

**Items to Note:**
- You can choose to just assign, just register, or assign and register both.
- You can reassign an activity if you check the “Ignore Previous Completions” when assigning an activity.*
- The exception report in Manager Dashboard only shows assignments not registrations.

**Signing Out:**
You can sign out by clicking the Self icon in the top toolbar and selecting Signout. The application stores any user preferences that you saved.

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