

Learning Zone Guide: How to Navigate the Management Dashboard.

This guide is aimed at those colleagues across all services who manage people. This will include Senior Leadership, Area and Regional Managers, home/scheme Managers, Admin Managers, Care Team Leaders and may also include other roles with access to this function.

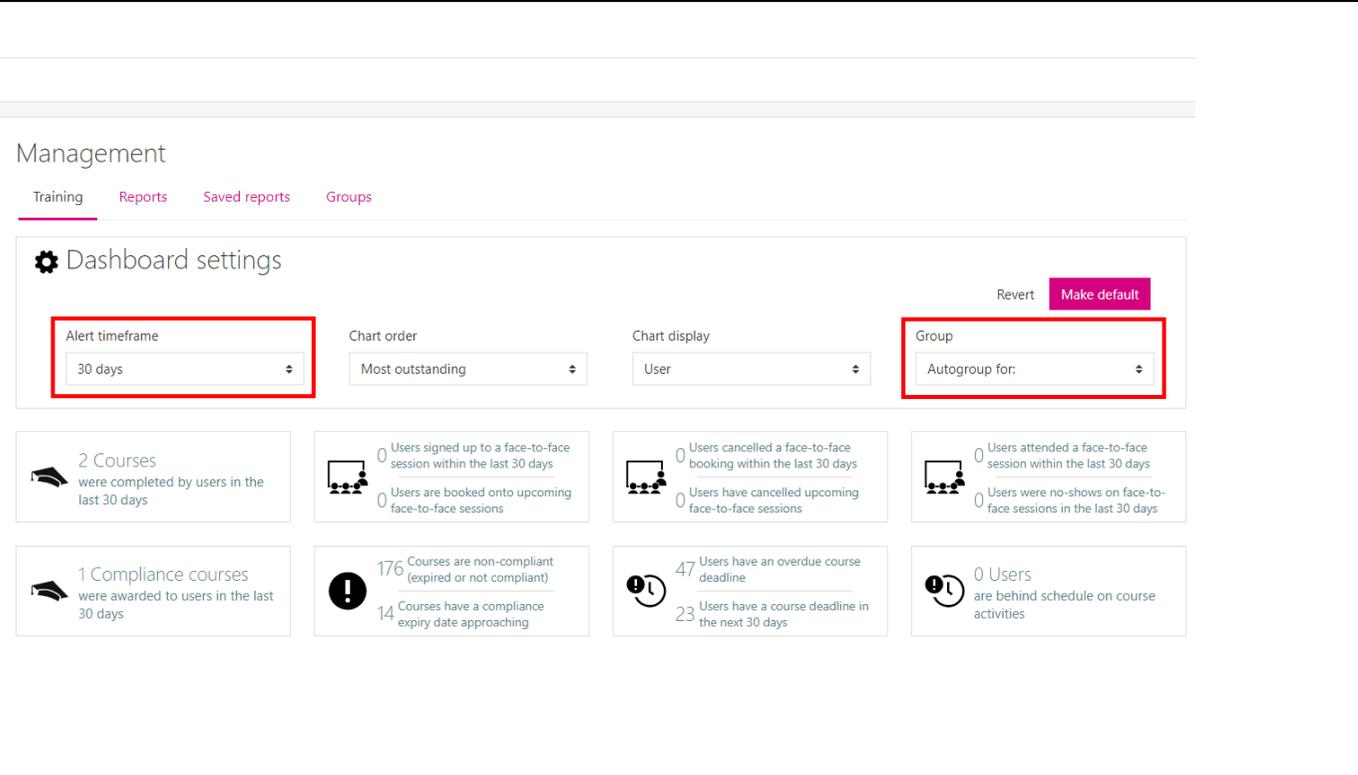
Within the Learning Zone, if you hold a management role or have been designated to manage your sites training and People Development have been informed, you will have a unique level of access within the system that enables you to access the management dashboard. This will allow you to review, monitor and track training compliance, including accessing the Predefined compliance RAG report.

This guide will cover the following areas.

1. Dashboard settings
2. Site compliance rates and progress charts

1. Dashboards settings.

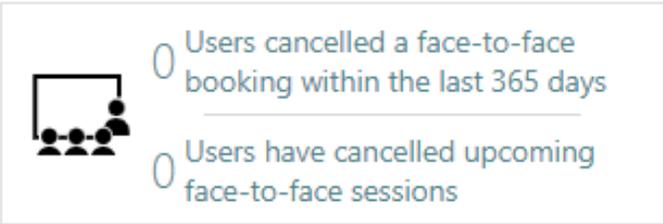
- Managers will be presented with the 'Management Dashboard' as the default landing page when logging in.
- You will notice 4 functions at the top of the dashboard these instructions focus on the 'Training' function.
Using the filters, you will allow you to drill down and view the data you wish to.
- The following guidance will go through each 'snapshot window' and data chart and how to use them.



1. To view information in the 'snapshot windows' choose the Timeframe and Group filters to see the information you wish to.
2. Click 'Alert Timeframe' and choose the timeframe you wish to view.
3. Click Group and depending on your reporting level you can choose Region, Area, Location, or your name as the manager and or your direct reports.

<div style="display: flex; flex-wrap: wrap; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p>2 Courses were completed by users in the last 30 days</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p>0 Users signed up to a face-to-face session within the last 30 days 0 Users are booked onto upcoming face-to-face sessions</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p>0 Users cancelled a face-to-face booking within the last 30 days 0 Users have cancelled upcoming face-to-face sessions</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p>0 Users attended a face-to-face session within the last 30 days 0 Users were no-shows on face-to-face sessions in the last 30 days</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p>1 Compliance courses were awarded to users in the last 30 days</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p>176 Courses are non-compliant (expired or not compliant) 14 Courses have a compliance expiry date approaching</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p>47 Users have an overdue course deadline 23 Users have a course deadline in the next 30 days</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p>0 Users are behind schedule on course activities</p> </div> </div>	<p>4. As you review the snapshot windows, click on the text which will reveal further data and or the reporting function. For further information on this refer to the How to run reports work instructions.</p>
<div style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p>162 Courses were completed by users in the last 90 days</p> </div> <div style="border: 1px solid #ccc; padding: 10px;"> <p>149 Compliance courses were awarded to users in the last 90 days</p> </div>	<p>5. Having chosen your filters, the first window displays the number of courses completed.</p> <p>6. The second window displays the number of compliance courses completed.</p>

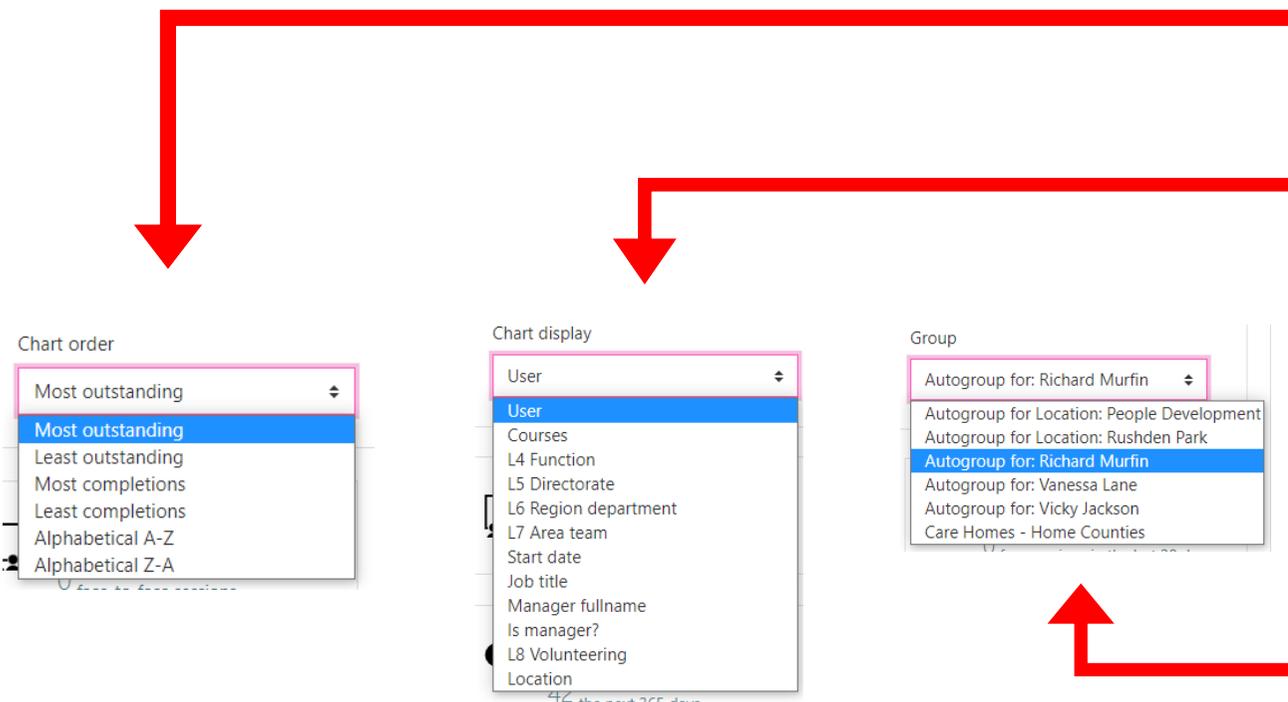
<div data-bbox="168 395 842 619" style="border: 1px solid #ccc; padding: 10px;">  <p>0 Users signed up to a face-to-face session within the last 365 days</p> <hr/> <p>0 Users are booked onto upcoming face-to-face sessions</p> </div>	<p>7. This window displays the number of learners that have enrolled on a face to face/webinar course within the chosen timeframe, but they still may need to be booked on it.</p> <p>8. The bottom half of the window shows the number of learners that are booked onto upcoming face to face/webinar sessions.</p>
<div data-bbox="168 852 833 1072" style="border: 1px solid #ccc; padding: 10px;">  <p>176 Courses are non-compliant (expired or not compliant)</p> <hr/> <p>14 Courses have a compliance expiry date approaching</p> </div>	<p>9. This window displays the number of courses that are non-compliant and require completing.</p> <p>10. The bottom half of this window displays the number courses that are due to expire and become non-compliant.</p>

	<p>11. This window displays the number of learners that have cancelled face to face/webinar sessions.</p> <p>12. The bottom half of this window displays the number of learners that cancelled upcoming face to face/webinar sessions.</p>
	<p>13. The window displays the number of learners that have an overdue course deadline.</p> <p>14. The bottom half of this window displays the number of learners that have courses due to expire.</p>

	<p>15. This window displays the number of learners that have attended face to face/webinar sessions.</p> <p>16. The bottom half of the window displays the number of learners who did not attend face to face/webinar sessions they were booked to attend.</p>
	<p>17. The final window displays the number of learners who are behind schedule where courses they are enrolled to complete have more than one element to complete. This means there is more than one activity such as pre-course reading, a video, quiz etc... as part of that specific course.</p>

2. Reviewing site and individual compliance.

- To view compliance data, you can choose what you'd like to see by amending the filters in the Dashboard settings. These filters will change the data displayed in the **Compliance** and **Course progress charts**. The Chart display and Group filters will also update the data you see in the **Compliance/Completion rate pie charts** depending on what you select.



- Chart Order** – choose which order you'd like to see the data displayed within the chart.
- Chart Display** – This filter provides various options, which depending on your role enables you to choose levels, types of user's roles and more. These choices update both compliance and completion progress charts.
- Group** – This filter focuses on the sites and people that you wish to view. Depending on your role you can report on, Regional, Areas or

	<p>local level compliance and completions.</p>
<p>Compliance rate ?</p> <p>82% 76% Site compliance</p> <p>81% 1% 3% 14%</p> <ul style="list-style-type: none"> Compliant Awaiting re-compliance Expired Not compliant 	<ol style="list-style-type: none"> 4. To view overall site compliance, go to the Group filter and choose the site manager or location name. 5. The compliance rate pie chart indicates the organisations compliance which is the darker number of the two and smaller in size, 76%. The sites compliance is 82%, 6% higher than the organisational rate. 6. The pie chart is also RAG rated to indicate the percentage breakdown of each status. i.e. 81% compliant, 1% awaiting re-compliance (<i>this means the course is due but not expired</i>), 3% expired and 14% not started (<i>this indicates new starter</i>

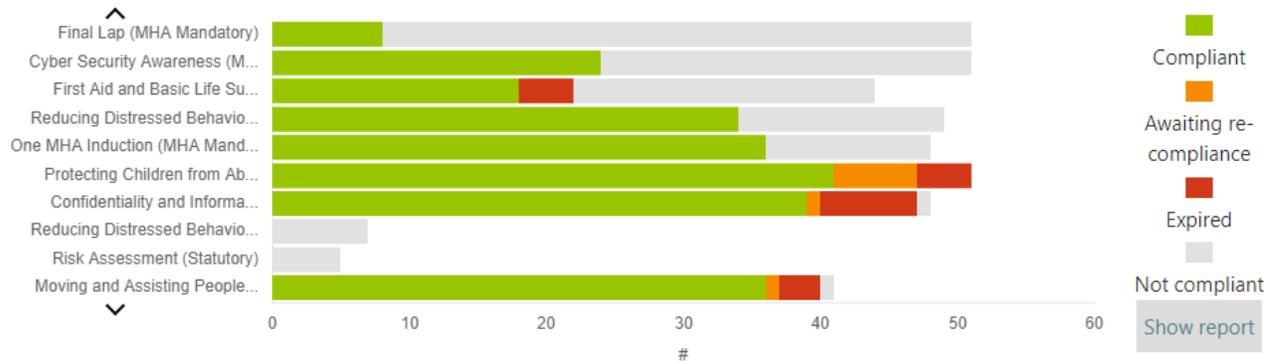


courses which are within the initial completion timeframe).

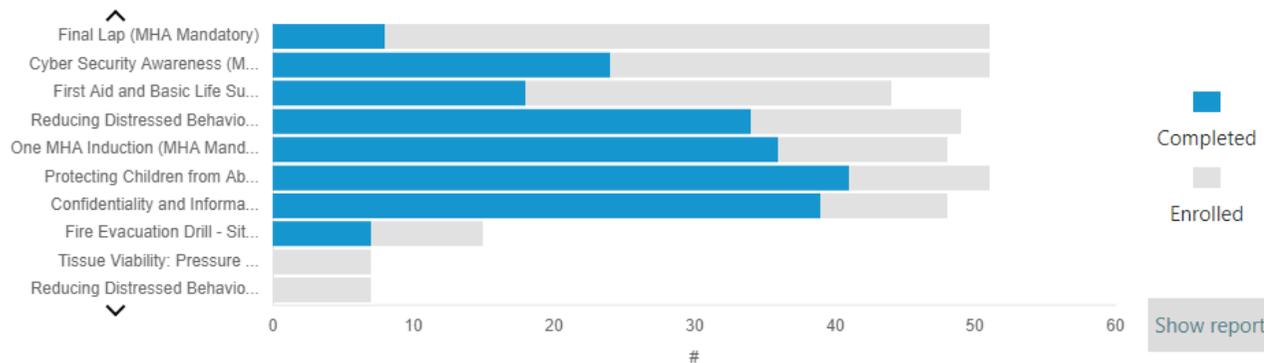
- Once you've chosen the specific site/s or manager in the Group filter, choose what data you wish to see being reported on for that site in the compliance and completion charts.
- Here you can choose users which displays data on each learner within that site indicating their individual RAG rated compliance bar.
- The colours indicate the levels of compliance as per the key. If you click 'show report' you'll move through to Reports page, instructions can be found in the How to run managers' report work instructions.

	<p>10. Hover over the user and you'll see a legend display the numbers relating to the coloured RAG status.</p>
<p>The screenshot shows a 'Compliance levels' section with three vertical bars representing different categories. The first bar is teal and labeled 'Statutory' with a '100%' badge. The second bar is dark teal and labeled 'Regulatory' with a '100%' badge. The third bar is magenta and labeled 'MHA Mandator' with a '93%' badge. Below the 'MHA Mandator' bar is a grey button labeled 'Show report'.</p>	<p>11. To view compliance levels under each priority category, choose the site/s or manager in the Group filter.</p> <p>12. The compliance level is then updated to display the percentage completion rate for each priority level.</p> <p>13. Here you can see that all Statutory courses are 100% compliant as are Regulatory courses. MHA Mandatory are 93% which means 7% are not compliant and could either be overdue, not started or due to the new starter initial timeframe.</p> <p>14. Click on the report and you'll be moved to the reporting function.</p>

Compliance progress ?

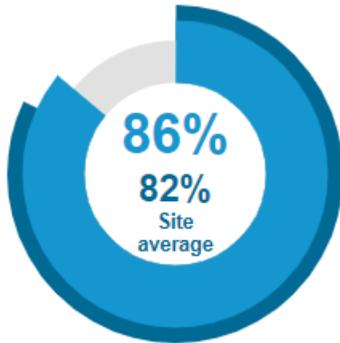


Course completion progress ?



15. To review course compliance, choose the site/s or manager in the Group filter.
16. Now choose Courses in the Chart Display and then Most outstanding in the Chart Order filters.
17. You'll be able to see the list of courses in the Compliance Progress chart and identify which course/s are with most or least compliant.
18. The view courses completions in the Course completion progress chart, follow the same steps as above.
19. You'll then be able to see the courses with the most and least completions recorded.

Completion rate ?



20. To view your sites completion rate against that of the organisations, choose the site/s or manager in the Group filter.
21. The Completion rate is then recorded for that site or those sites (Region or Area) in the pie chart.
22. The darker coloured and smaller number of the two indicates the organisations completion rate compared with the sites completion rate. i.e. 82% organisation completion rate compared to the sites completion rate of 86%. This is 4% higher than the organisational rate.