

LMS USER GUIDE

STANDARD OPERATING PROCEDURES/TOOLBOX TALKS

INFORMATION – This functionality allows a record of on the job training to be kept within the LMS so that Managers know which staff can operate the equipment/processes. This record allows a detailed Skills Matrix to be generated to enable Managers to clearly see where training has taken place or is still required.

If your **LMS / Organisation** has access to this functionality, then it will be available to:

Section Administrators

Organisation Administrators

INSTRUCTIONS

- 1) Navigate to [Record SOP Session](#) using the following procedure

Dashboard

Record SOP Session

- 2) All the functionalities can be accessed from a single page

The screenshot displays the 'Record SOP Session' interface within the E-nable LMS. The header includes the E-nable logo and navigation links: Home, Manage Users, Help & Support, and Logout. The breadcrumb trail shows the path from the Section Admin Dashboard to the Record SOP Session page, dated 04 November 2014.

Record SOP Session

Session Details

SOP Course: [Dropdown menu]

The learners will be assigned to this course.

Venue: [Dropdown menu]

Title: [Text input]

Description: [Text area]

Start Date: [Date picker: 4 Nov 2014 09:00]

End Date: [Date picker: 4 Nov 2014 17:00]

Learners Attending

You can search for a list of users by separating their names with commas [more](#).

Surname: [Text input] Find

☒ Partial Matches ☐ Sounds Like ☐ Exact Match

Select an Organisation: [Dropdown menu]

User Type: [Text input]

First Name	Surname	Postcode	User ID	User Type
There are no items to display in this list				

[Check All](#) [Uncheck](#)

☒ View Active Users ☐ View Expired Users 0 records

Job Skills

- 3) To create a new SOP or add a date to an existing SOP select the SOP course drop down box

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Home Manage Users Help & Support Logout

>> Section Admin Dashboard >> Record SOP Session 02 November 2011

Record SOP Session

Session Details

SOP Course

The learners will be assigned to this course.

Location

Title

Description

Time & Date

Learners Attending

You can search for a list of users by separating their names with commas [more](#).

- 4) If your wish to create a **New SOP/Toolbox** session. Select the - **Not In List**- Option

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Home Manage Users Help & Support Logout

>> Section Admin Dashboard >> Record SOP Session 04 November 2014

Record SOP Session

Session Details

SOP Course -- Not In List --

The learners will be assigned to this course.

SOP Course (not in list)

SOP Documents

Browse... Upload Delete

These files will be uploaded as learning material to the new course.

Venue

Title

Description

Start Date 4 Nov 2014 09 00

End Date 4 Nov 2014 17 00

5) You can now enter the title for the new SOP/Toolbox Talk

6) You can add supporting training documents to the new SOP/Toolbox talk Which will appear on the learner active learning tab (if the session took place in the past it will appear on the completed learning tab)

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Home Manage Users Help & Support Logout

>> Section Admin Dashboard >> Record SOP Session 04 November 2014

Record SOP Session

Session Details

SOP Course: -- Not In List --

The learners will be assigned to this course.

SOP Course (not in list): SOP Paul1

SOP Documents:

These files will be uploaded as learning material to the new course.

Venue:

Title:

Description:

Start Date: 4 Nov 2014 09:00

End Date: 4 Nov 2014 17:00

7) You need to select a location for the session. To add a new one choose the **–Not In List–** option from the drop down box

The screenshot shows a form with fields for Venue, Title, Description, Start Date, and End Date. A dropdown menu is open, displaying a list of locations: CAM3, CAM600, FC, Kiveton, Leechmere, Office, Online, PAB, PAB6, Paul, Practice Venue, Training Event Venue, VC, Virtual College, xxxxxx, and -- Not In List --. The dropdown is highlighted with a red border. An arrow points from the instruction text to the dropdown menu.

8) Enter a **Title** for the new session

9) Enter a description for the session

10) Select a date and time for the SOP/Toolbox talk (this can be in the **future** or the **past**)

The screenshot shows a form with fields for Venue, Locale (Optional), Title, Description, Start Date, and End Date. The Venue field is set to PAB6. The Title field is highlighted with a green border. The Description field is highlighted with a blue border. The Start Date and End Date fields are highlighted with a red border. Arrows point from the instruction text to the Title, Description, and Start Date fields.

11) You can search for and select the learners attending the session here

Learners Attending

You can search for a list of users by separating their names with commas [more](#).

Surname :

☒ Partial Matches ☐ Sounds Like ☐ Exact Match

Or select a department or organisation

◆ Everyone

User Type

	First Name ↓	Surname ↓	Postcode ↓	User ID ↓	User Type ↓
<input checked="" type="checkbox"/>	Paul	Acres	LS298DD	paulacres30	Learner
<input checked="" type="checkbox"/>	Paul	Acres	LS298DD	paulacres2	Learner
<input checked="" type="checkbox"/>	Paul	Acres18	LS298DD	paulacres18	Learner
<input type="checkbox"/>	Paul	Acres20	LS298DD	paulacres20	Learner

[Check All](#) [Uncheck](#)

☒ View Active Users ☐ View Expired Users

85 records

12) If you wish to link these sessions to **Job Skills** and the skill matrix you can do so from this section of the form. You need to select the relevant Job role from the drop down box

Job Skills

What job skill level does attending this session bring the learners to?

Job Roles

Learner ↓

<input checked="" type="checkbox"/>	Paul Acres
<input checked="" type="checkbox"/>	Paul Acres
<input checked="" type="checkbox"/>	Paul Acres18

<input type="checkbox"/>	Job Knowledge	No Lev
<input type="checkbox"/>	Unsatisfactory	1
<input type="checkbox"/>	Improvement desired	2
<input type="checkbox"/>	Meets expectations	3
<input checked="" type="checkbox"/>	Exceeds expectations	4

13) The additional files function allows Administrators/ Trainers the ability to upload a scanned signed registers and other documents. These will only be visible to Administrators

Additional Files

Any additional files, e.g. safety notice or attendance register.

C:\Users\paul.butler\Desktop Browse...

Browse...

Browse...

Browse...

Save

14) The SOP/Toolboxtalk session is recorded in the **Events** directory

15) Select **View Event**

Title : Find

☒ Tick here to find partial matches


PAB131011
PAB260411
SOP-Pab6
test

21 records

Add New Event

View Event

17) To check on attendance or docs relative to this session click [View](#).



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Home

Manage Users

Help & Support

Logout

>> [Section Admin Dashboard](#) >> [Training Events](#) >> [View Event](#)

02 November 2011

Training Event Details

Title
SOP-Pab6

Description
SOP-Pab6 description

Training Event Courses

Title	Type	Action
SOP-Pab6	E-learning	View >>

Training Event Dates

Start	End	Venue	Attendance	Action
01-Nov-2011	01-Nov-2011	PAB	3 of 3	View >>


Training Event Requests

There are no requests outstanding for this training event.

Quicklinks

- [Courses](#)
- [Dates](#)
- [Venues](#)
- [Requests](#)
- [Managers](#)
- [File Uploads](#)
- [Edit Details](#)

Attendance



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Home

Manage Users

Help & Support

Logout

>> [Section Admin Dashboard](#) >> [Training Events](#) >> [View Event](#) >> [View Event Date](#)

02 November 2011

View Event Date

Title

SOP-Pab6

Description

SOP-Pab6 description

Courses

SOP-Pab6

Venue

PAB

Date

01-Nov-2011 - 01-Nov-2011

Time

09:00 AM - 09:00 AM

Per Person Cost

£0

Allocation

3 of 3 places allocated.

Status

Open

Quicklinks

▶ [Attendance](#)

▶ [Requests](#)

▶ [Edit Details](#)

19) Select
**Attendance
Register**

Home Manage Users Help & Support Logout

>> Section Admin Dashboard >> Training Events >> View Event >> View Event Date >> Manage Attendance 02 November 2011

Awaiting Confirmation
There are currently no attendees awaiting confirmation.

Confirmed

Name	Status
Paul Acres	Confirmed
Paul Acres	Confirmed
Paul Acres18	Confirmed

Cancelled
There are currently no cancellations for this event date.

Quicklinks

- Add Attendee
- Send Confirmation Reminder
- Send Event Reminder
- Attendance Register**
- Allocate Training

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20) If an error has
been made
regarding
attendance it can
be altered here

21) NB: If the
session is in the
future the
Administrator has
to manually mark
the register

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>> Section Admin Dashboard >> Training Events >> View Event >> View Event Date >> Manage Attendance >> Attendance Register 02 November 2011

Attendance Register:
SOP-Pab6 01-Nov-2011 09:00AM to 09:00AM at PAB [Open]

Name	Note	Confirmation
Paul Acres PAB Enable Demonstration		<input type="radio"/> Awaiting <input checked="" type="radio"/> Confirmed <input type="radio"/> Cancelled <input type="radio"/> Present <input type="radio"/> Absent
Paul Acres (PAB Enable Demonstration)		<input type="radio"/> Awaiting <input checked="" type="radio"/> Confirmed <input type="radio"/> Cancelled <input type="radio"/> Present <input type="radio"/> Absent
Paul Acres18 PAB Enable Demonstration		<input type="radio"/> Awaiting <input checked="" type="radio"/> Confirmed <input type="radio"/> Cancelled <input type="radio"/> Present <input type="radio"/> Absent

Confirm All

Submit Cancel Export

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23. To view any documents/registers uploaded select **File Uploads**

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>> [Section Admin Dashboard](#) >> [Training Events](#) >> [View Event](#) 02 November 2011

Training Event Details
Title
SOP-Pab6
Description
SOP-Pab6 description

Training Event Courses

Title	Type	Action
SOP-Pab6	E-learning	View >>

Training Event Dates

Start	End	Venue	Attendance	Action
01-Nov-2011	01-Nov-2011	PAB	3 of 3	View >>

Training Event Requests

There are no requests outstanding for this training event.

Quicklinks

- ▶ [Courses](#)
- ▶ [Dates](#)
- ▶ [Venues](#)
- ▶ [Requests](#)
- ▶ [Managers](#)
- ▶ [File Uploads](#)
- ▶ [Edit Details](#)

24) Documents can be Viewed here and added if necessary.

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>> [Section Admin Dashboard](#) >> [Training Events](#) >> [View Event](#) >> [Event File Management](#) 07 November 2011

Event File Management

Event Files

Upload files related to the event such as the safety sheet or attendance register.

File Name
 User Guide - Snap_634558303238214849.docx

[Delete](#) [Download](#)

Upload File

[Browse...](#)

[Upload](#)

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SOP/TOOLBOX TALKS FROM THE LEARNER PERSPECTIVE

1) If the session was in the past it will appear on the learners completed tab

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>> [Dashboard](#)

Active Learning Completed Learning Requested Learning Personal Development Help ?

Completed Events

Title	Date	Status	Action
Gardening Course	02-Sep-2010	Absent	
Greencore-Test	02-Sep-2010	Awaiting Confirmation	
David's Course	19-Oct-2010	Absent	
Training Scheme for Defender/Transit Vehicle Operator	15-Nov-2010	Absent	
Training Scheme for Defender/Transit Vehicle Operator	20-Jan-2011	Absent	
PAB - Event Management	08-Mar-2011	Present	
Greencore-Test	12-Apr-2011	Present	
PAB - Event Management	13-Apr-2011	Pending	
PAB260411	27-Apr-2011	Pending	
Gardening Course	05-May-2011	Present	
SOP-Pab6	01-Nov-2011	Present	

2) If learning content has been added to the session it will also appear on the completed learning tab

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>> [Dashboard](#)

Active Learning Completed Learning Requested Learning Personal Development Help ?

Completed Learning [Export](#)

Title	Type	Date Completed	Action
Superquiz	E-learning	27-Oct-2011	
Department Monitor Functionality	E-learning	04-Oct-2011	
Pauls Test Phase Course	E-learning	04-Oct-2011	
PARWYFS	In House Training	08-Sep-2011	
DM3	E-learning	28-Jul-2011	
Cleveland Potash 2	E-learning	29-Nov-2010	
Short Answer Questions	E-learning	18-Nov-2010	
Learner Manager Functionality	E-learning	04-Nov-2010	
SOP-Pab6	E-learning	N/A	

Completed Events

Title	Date	Status	Action
-------	------	--------	--------

3) If the SOP session was in the past and you wish to allocate training relevant to the SOP which has to be completed by the learner. Add a quiz to the content

4) Although the session shows completed. You will see from the following screen that the associated Course remains on the active learning tab

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>> Dashboard 07 November 2011

Active Learning **Completed Learning** Requested Learning Personal Development Help ?

[Learner Manager Functionality](#) E-learning N/A

[Training Scheme For Defender/Transit Vehicle Operator](#) E-learning N/A

[SOP-Pab6](#) E-learning N/A

Completed Events

Title	Date	Status	Action
Training Scheme for Defender/Transit Vehicle Operator	20-Jan-2011	Awaiting Confirmation	
PAB - Event Management	13-Apr-2011	Pending	
PAB260411	27-Apr-2011	Pending	
SOP - 21111	02-Nov-2011	Present	
SOP - 081111	04-Nov-2011	Present	

Paul Acres20 Help ?

Organisation: PAB Enable Demonstration
Department: PAB Demos - Dept 1
Manager: N/A
Last Login: 15 Sep, 2011

[Remove Image](#)
[Edit Profile](#)

Messages Help ?

✉ You have (6) new messages in [your inbox](#)

5) The course with a quiz attached remains on the active learning tab.

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>> Dashboard 07 November 2011

Active Learning **Completed Learning** Requested Learning Personal Development Help ?

Active Learning Export

Title	Type	% Complete	Action
COSH V.2	E-learning		
Dept Monitor	E-learning		
DM3	E-learning		
Virtual Room Session 2022011	E-learning		

Active Events

Title	Date	Status	Action
Potash	07-Nov-2011	Confirmed	
SOP - PAB12	08-Nov-2011	Confirmed	

Paul Acres20 Help ?

Organisation: PAB Enable Demonstration
Department: PAB Demos - Dept 1
Manager: N/A
Last Login: 15 Sep, 2011

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[Edit Profile](#)

Messages Help ?

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[Announcements](#)
[Links \(2\)](#)
[Resources \(1\)](#)

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SKILLS MATRIX

1) To create a Skills Matrix. Select **Skills Matrix** from the dashboard

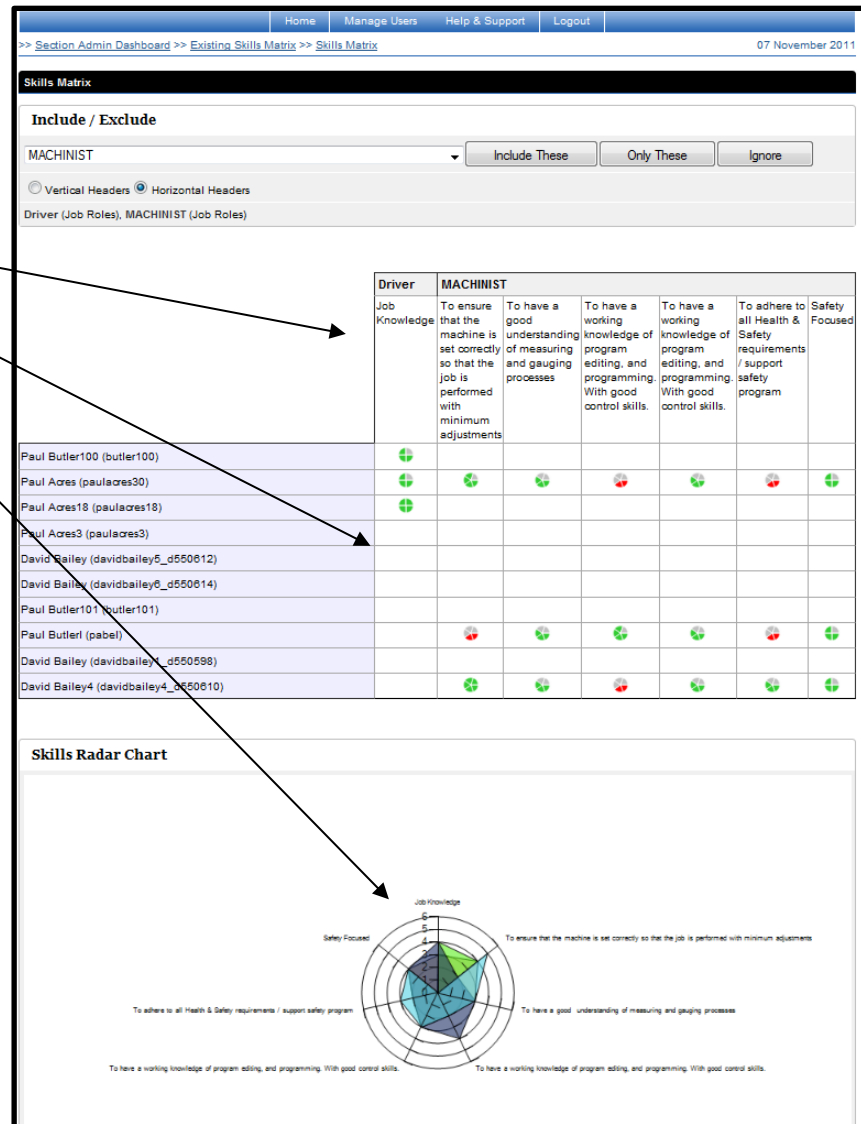
The screenshot shows the 'Section Admin Dashboard' with a navigation bar at the top containing links for Home, Manage Users, Help & Support, and Logout. The date '07 November 2011' is displayed in the top right. Below the navigation bar, there is a 'Recently Viewed Items' section with a list of links such as 'View Course: Learner Manager Functionality' and 'View Course: CSHH V.2'. To the right, there is a 'Quicklinks' section with a list of links including 'Users', 'Groups', 'Training Events', 'Skills Matrix' (which is highlighted with a green box), 'Existing Skills Matrix', 'Record SOP Session', 'Personal Development', 'Pending Certificates', and 'My Profile'. Below the Quicklinks, there is a 'Courses & Modules' section.

2) From this screen you can filter on which learners you wish to view.

The screenshot shows the 'Skills Matrix' configuration screen. At the top, there is a dropdown menu for 'PAB Demos - Dept 1' and an 'Include' button. Below this, there is a list of job roles and groups. A green box highlights the 'Include / Exclude' section, which contains a dropdown menu for 'PAB Demos - Dept 1' and buttons for 'Include These' and 'Only These'. Below this, there is a section for 'Vertical Headers' and 'Horizontal Headers' with radio buttons. A red box highlights the 'Ignore' button. Below the configuration section, there is a table of skills for 'MACHINIST'.

	To ensure that the machine is set correctly so that the job is performed with minimum adjustments	To have a good understanding of measuring and gauging processes	To have a working knowledge of program editing, and programming. With good control skills.	To have a working knowledge of program editing, and programming. With good control skills.	To adhere to all Health & Safety requirements / support safety program	Safety Focused
Paul Butler (pabel)						
David Bailey (davidbailey1_d550598)						
Paul Acres (paulacres30)						
David Bailey4 (davidbailey4_d550610)						

3) You can now view the competency levels for your learners and also a Radar Chart



OPERATIONAL TRAINING MATRIX

1) Select **Reports** from your dashboard and then **Detailed Reports**

2) From this screen select **Operational Training Matrix**

3) Then select the parameters you wish to filter on

4) Then select **Submit**

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>> [Section Admin Dashboard](#) >> [Reports](#) >> [Report Selection](#) 06 December 2011

Report Selection

Please select a report from the list below:

- Evaluations Outstanding
- Learner Course List
- Learner Progress Summary
- Learner Results (Highest)
- Learner Results (Latest)
- Login - Analysis
- Logins - Not yet accessed
- Module Progress
- Offline Training Times
- Operational Training Matrix**
- Question Report
- Training Event Attendance
- Training Material (SCORM) Report
- User Report

Please select a format for your report:

☐ Full Report
☐ Drill down
☒ Format for Excel
☐ Email People in Report

Parameters

Organisation: -- Please Select Organisation --

Department: -- All --

Group: -- All --

Job Title: -- All --

Course: -- All --

Module: -- All --

People: -- All --

Start Date: (dd/mm/yyyy)

End Date: (dd/mm/yyyy)

☐ Include Expired Logins

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5) From this excel report screen it shows the allocation date of **Courses** and **Event Dates** and their statuses

GreencoreMatrixEXCEL (7).xls [Compatibility Mode] - Microsoft Excel

Job Title	Emp No.	Forename	Surname	Cleveland Potash	Cleveland Potash 2	COSH V2	Courses/ab Test Module	Department Monitor Functionality	DM	DM3	Learner Manager Functionality	Supervisor Food Safety V1	Level 3 PAB - ICCM	Pab081211 Training	paul - allocate on Pass
n/a	Paul	Kissack						12/10/2010		12/10/2010					
	Paul	Butler										30/09/2010			
	Paul	Acres18		30/11/2010	25/01/2011	24/08/2011	15/12/2010	28/07/2011	28/07/2011	30/12/2010		15/11/2010	16/12/2011	09/11/2010	
	Edward	Perrot			11/11/2010		04/08/2011								
	Paul	Butler101		18/11/2010											
Completed				4	0	0	0	2	0	0	0	0	1	0	0
In Progress				1	0	0	0	0	0	0	0	0	0	1	0
Not Completed				14	1	1	2	1	1	1	2	1	0	0	1

A date shown in **Red** indicates a course that has not been completed

A date shown in **Green** indicates a training session/course has been completed

A date shown in **Blue** indicates a training session to be delivered in the future