Skills for Health eLearning

Managers Additional Functionality User Guide

Version 2.0

Contents

Introduction

This guide is for managers using the Skills for Health eLearning platform.

Managers are users which have been assigned the manager role for any user group. This role provides managers with additional functionality, such as the ability to administer users and create reports.

Skills for Health eLearning

Cost-effective, quality-assured online learning delivered on a secure, cloud-based online platform, aligned to the UK health and social care training standards and frameworks.

Courses can be undertaken anytime anywhere and are self-paced allowing learners to bookmark their progress so that they can complete training in their own time.

500,000+ course completions every year from NHS, private health, and care organisations

Our eLearning is quality assured with the Skills for Health Quality Mark to deliver exceptional learning

The UK's leading not-for-profit online learning provider for health and social care settings

Experts in mapping in stat/man learning aligned to the Core Skills Training Framework

Simple, quick access for existing, new, and returning healthcare staff to train at pace

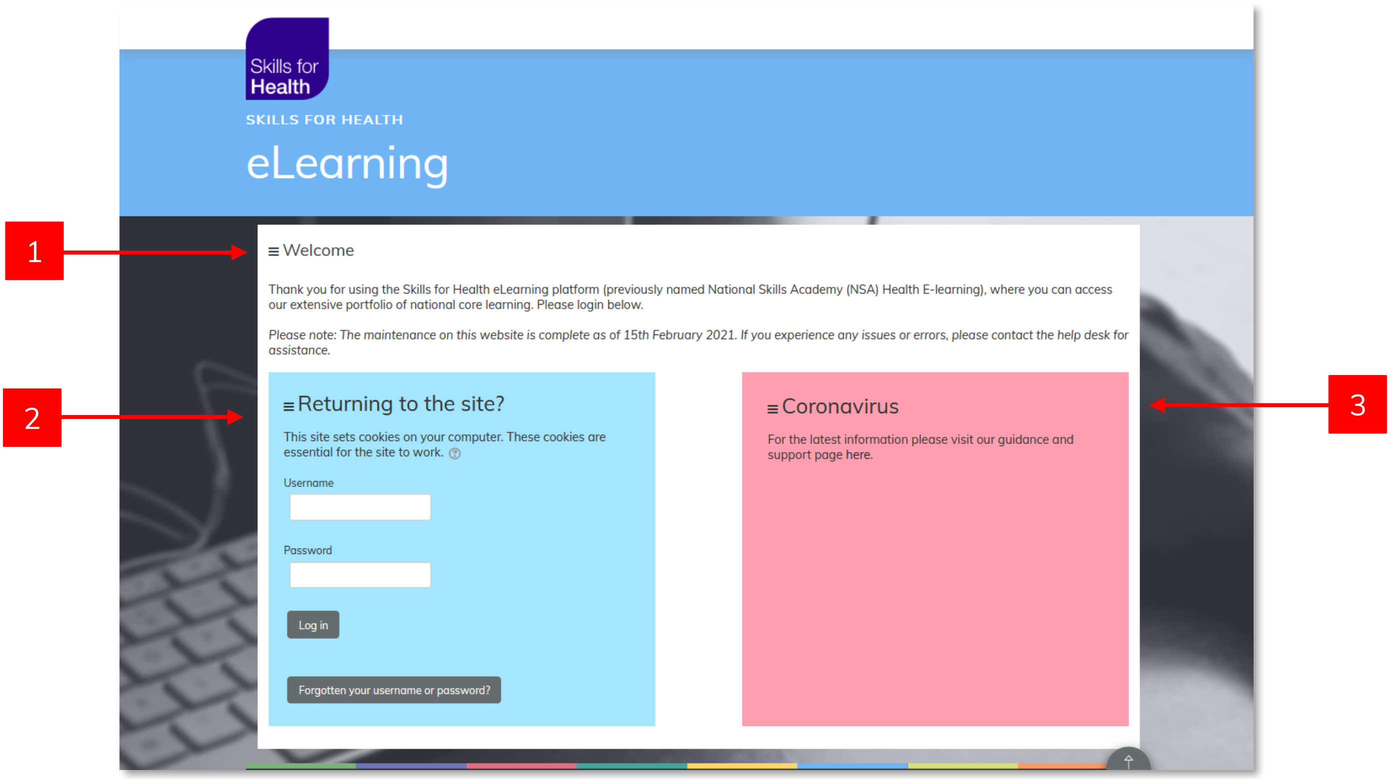
Mobile-first training at any time on any device, suited to a remote and locally dispersed workforce

Getting Started

To access Skills for Health eLearning you will need to navigate to **https://elearning.skillsforhealth.org.uk** from your web browser:

Your front page includes the following information:

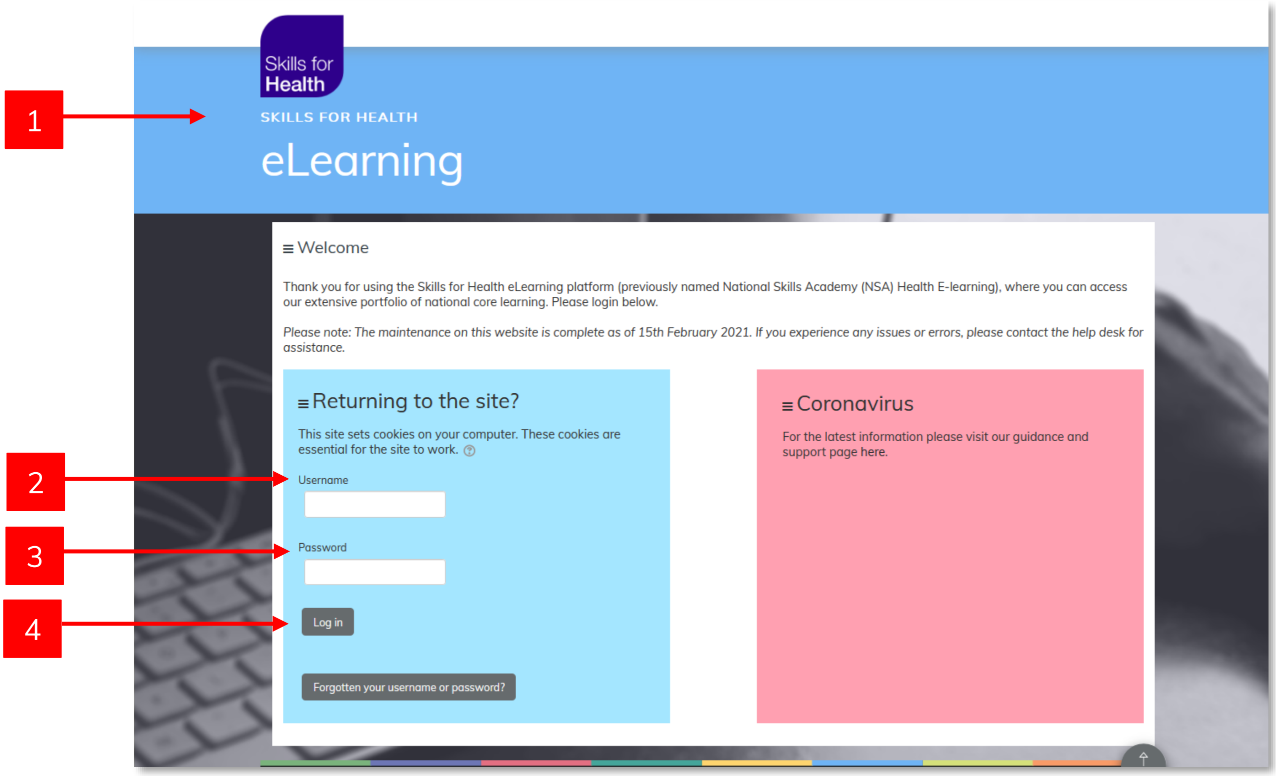
1. Welcome to the platform
2. Log in here
3. The latest news from Skills for Health

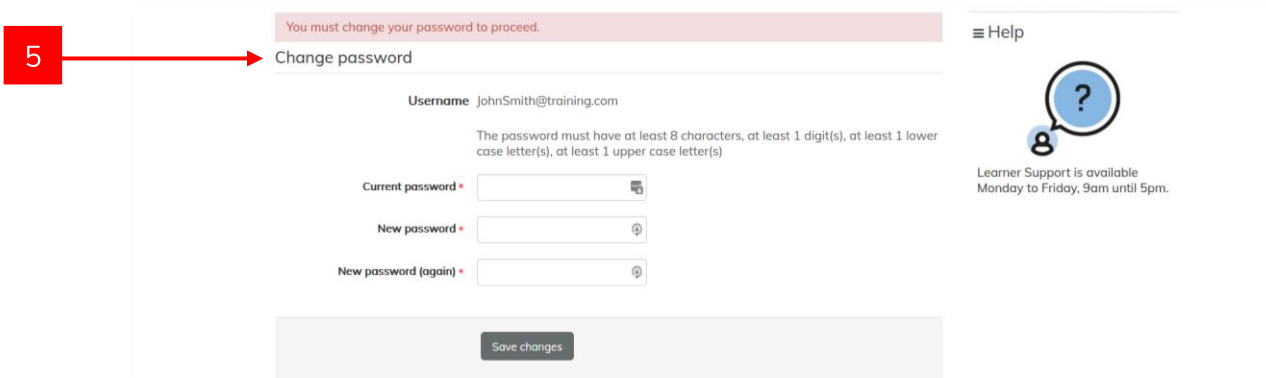


Logging in

To access Skills for Health eLearning you will firstly need to log in using a unique username and password.

1. Navigate to https://elearning.skillsforhealth.org.uk/
2. Enter your **username**. This will usually be an email address.
3. Enter your **password**.
4. Click **Log in**.
5. You may be prompted to **reset your password** upon logging in for the first time or if you have been issued a temporary password.

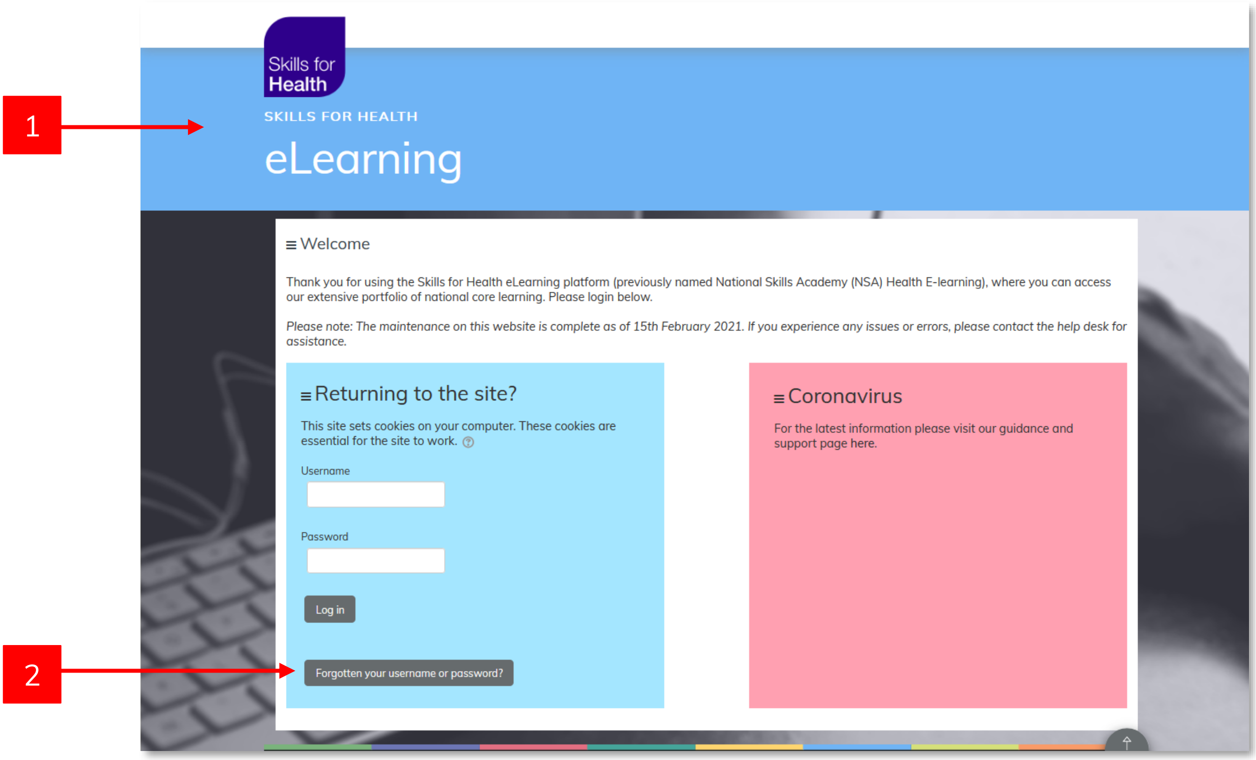


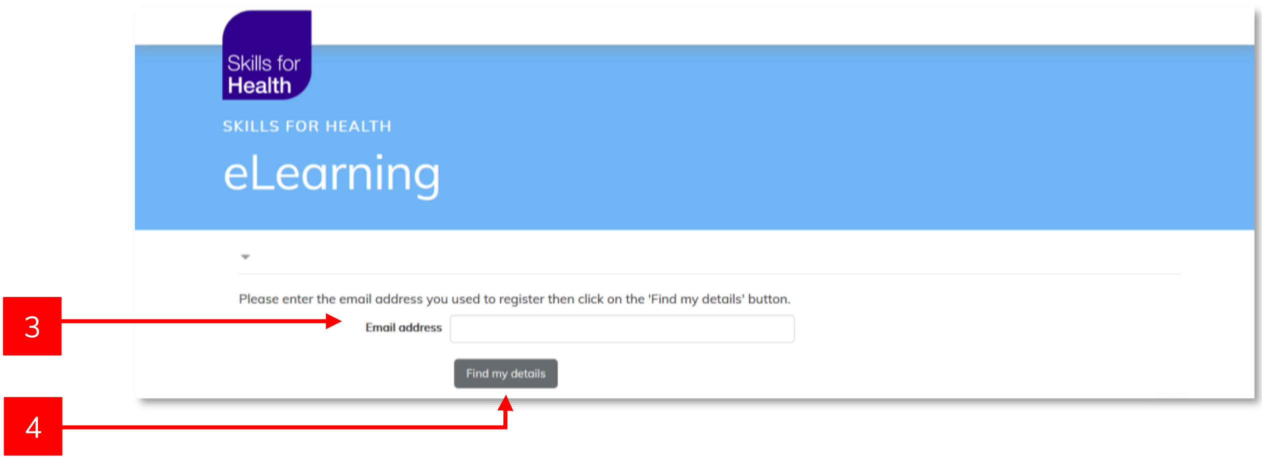


Trouble logging in

If you are having difficulties with logging into Skills for Health eLearning you can request your username or reset your password. You will need to know the email address you are registered with.

1. Navigate to https://elearning.skillsforhealth.org.uk/
2. Click **Forgotten your username or password?**
3. Enter the **email address** you used to register.
4. Click **Find my details**.
5. If your request has been successful you will **receive an email** prompting you to reset your password. This will be confirmed by an **on-screen message**.
6. Follow the **logging in instructions** contained within the email to access your eLearning.





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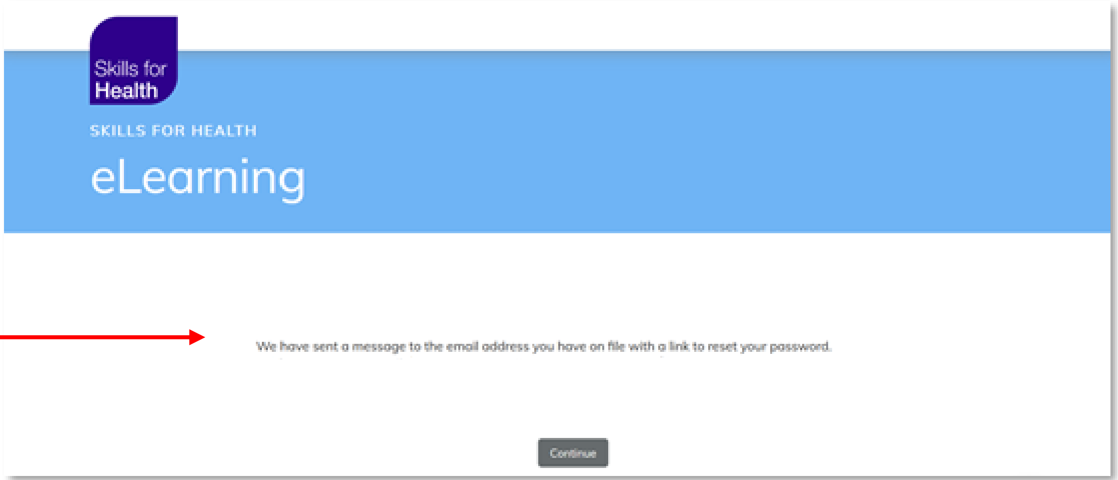
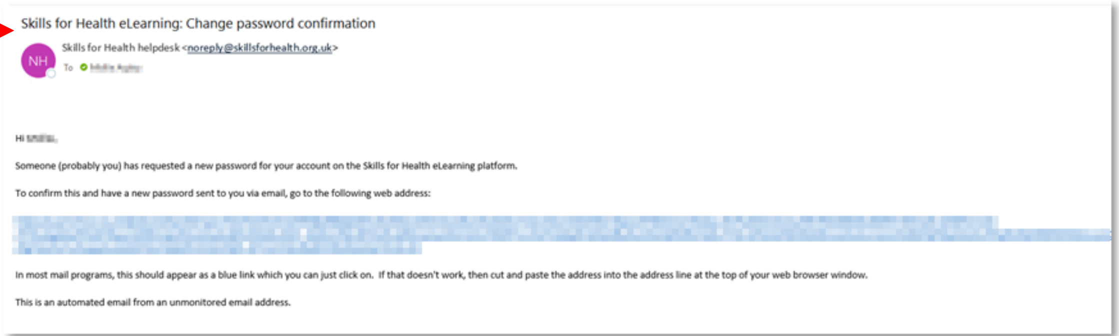

Skills for Health
SKILLS FOR HEALTH
eLearning
We have sent a message to the email address you have on file with a link to reset your password.
Continue

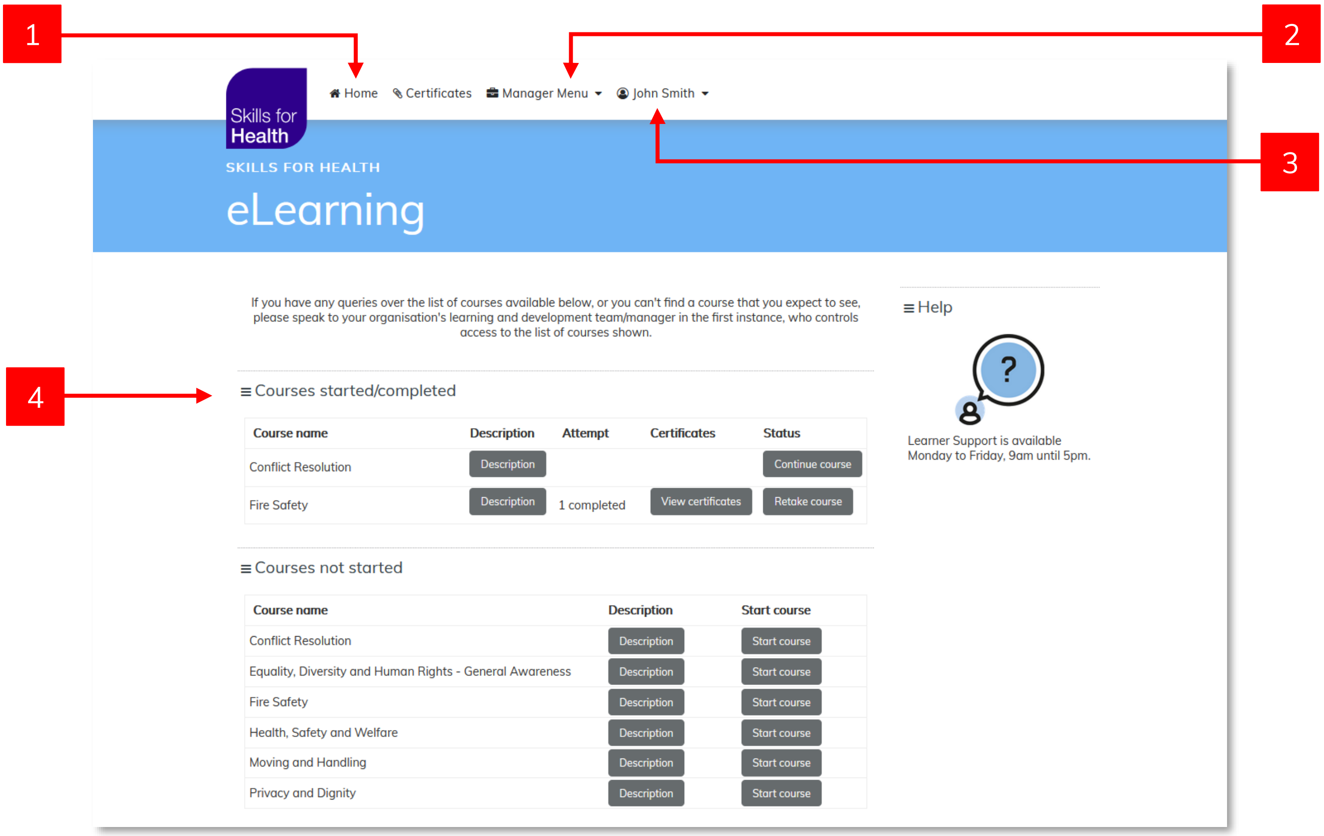
6


Skills for Health eLearning: Change password confirmation
NH
Skills for Health helpdesk <noreply@skillsforhealth.org.uk>
To
Hi
Someone (probably you) has requested a new password for your account on the Skills for Health eLearning platform.
To confirm this and have a new password sent to you via email, go to the following web address:
In most mail programs, this should appear as a blue link which you can just click on. If that doesn't work, then cut and paste the address into the address line at the top of your web browser window.
This is an automated email from an unmonitored email address.

Navigating the site

When you log in to Skills for Health eLearning, you will be taken to your home page. From here you can access your assigned learning or use the main menu to navigate to other parts of the site.

1. **Home** – access your assigned learning.
2. **Manager Menu** – these are additional functions you can access as a manager, including:
    - Clients/reporting
    - Users
    - Manager’s guide
3. **Profile details** – view and edit your profile or change your password.
4. **Course lists** – access the courses available to you, including course descriptions, starting a course or continuing a course you have already started.



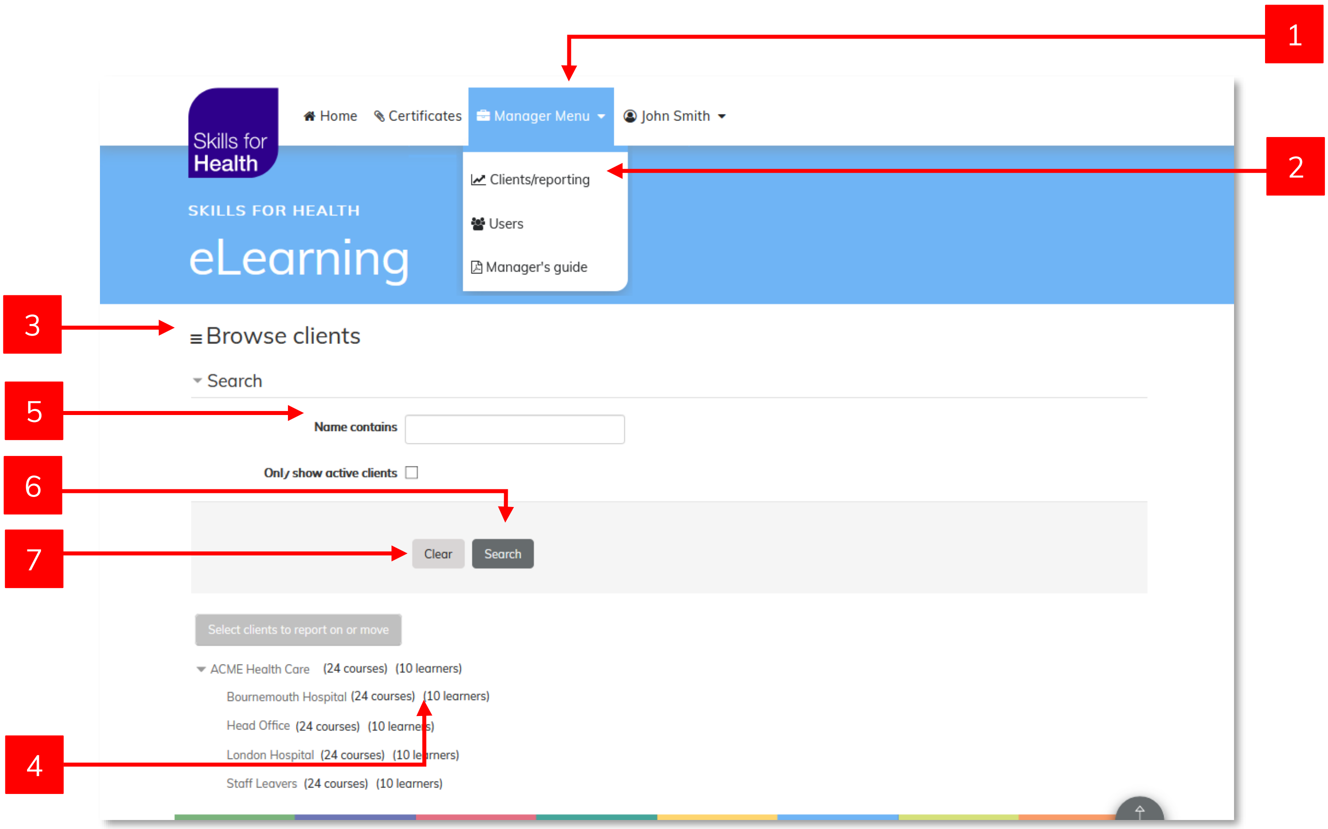
Viewing information for groups you manage

As a manager, you can view information on client user groups that you manage, such as learners within each group and courses that are available to them.

Viewing user groups you manage

Follow these instructions to view a hierarchical list of client user groups that you manage.

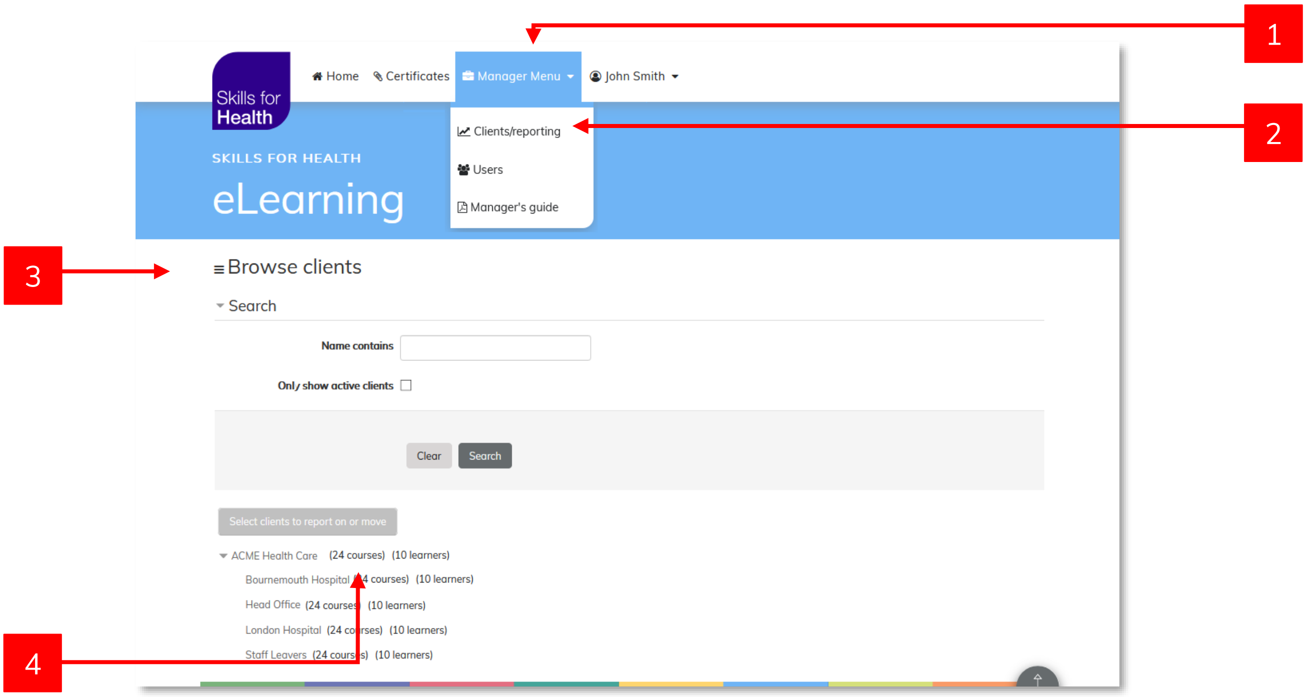
1. Navigate to **Manager Menu** from the main menu.
2. Select **Clients/reporting** from the drop-down.
3. The **Browse clients** screen provides a hierarchical list of groups you manage.
4. Beside each group you can click on either **Courses** or **Learners** to view more information on these groups.
5. If you manage a large number of groups, you can use the search function to find the group you require. Enter part or all of the group name in the **Name contains** search box.
6. Click **Search** to bring up all results relating to your search.
7. To return to your full list of user groups, click **Clear**.

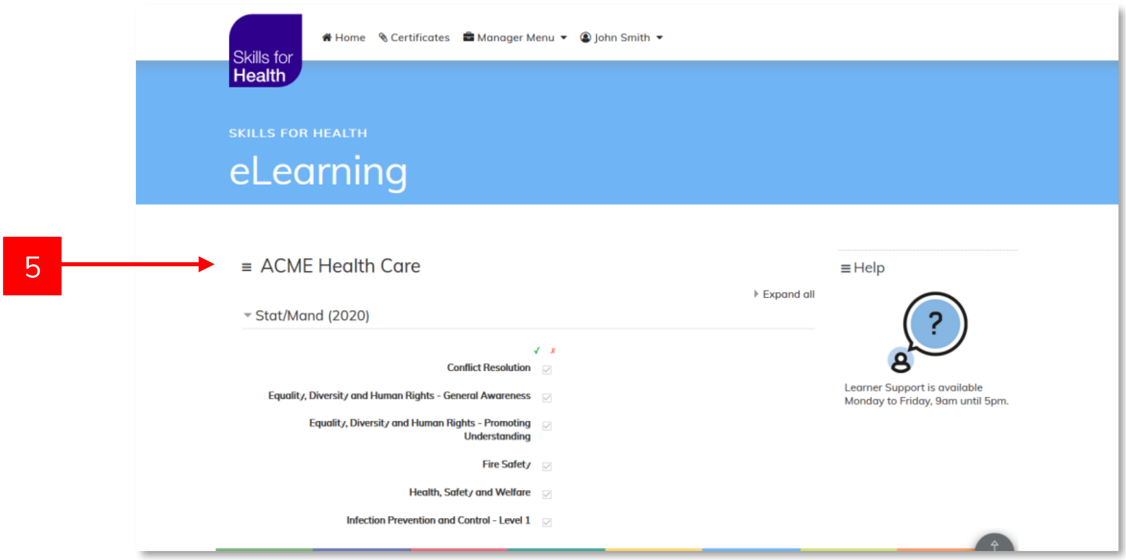


Viewing course information for groups you manage

These instructions detail how to view a list of courses available to users in a group you manage.

1. Navigate to **Manager Menu** from the main menu.
2. Select **Clients/reporting** from the drop-down.
3. The **Browse clients** screen provides a hierarchical list of groups you manage.
4. To view the courses available to a group, select **Courses** beside the group name. The number shown is the total number of courses available to users in this group.
5. A list of all available courses for this group will be viewable **on screen**.

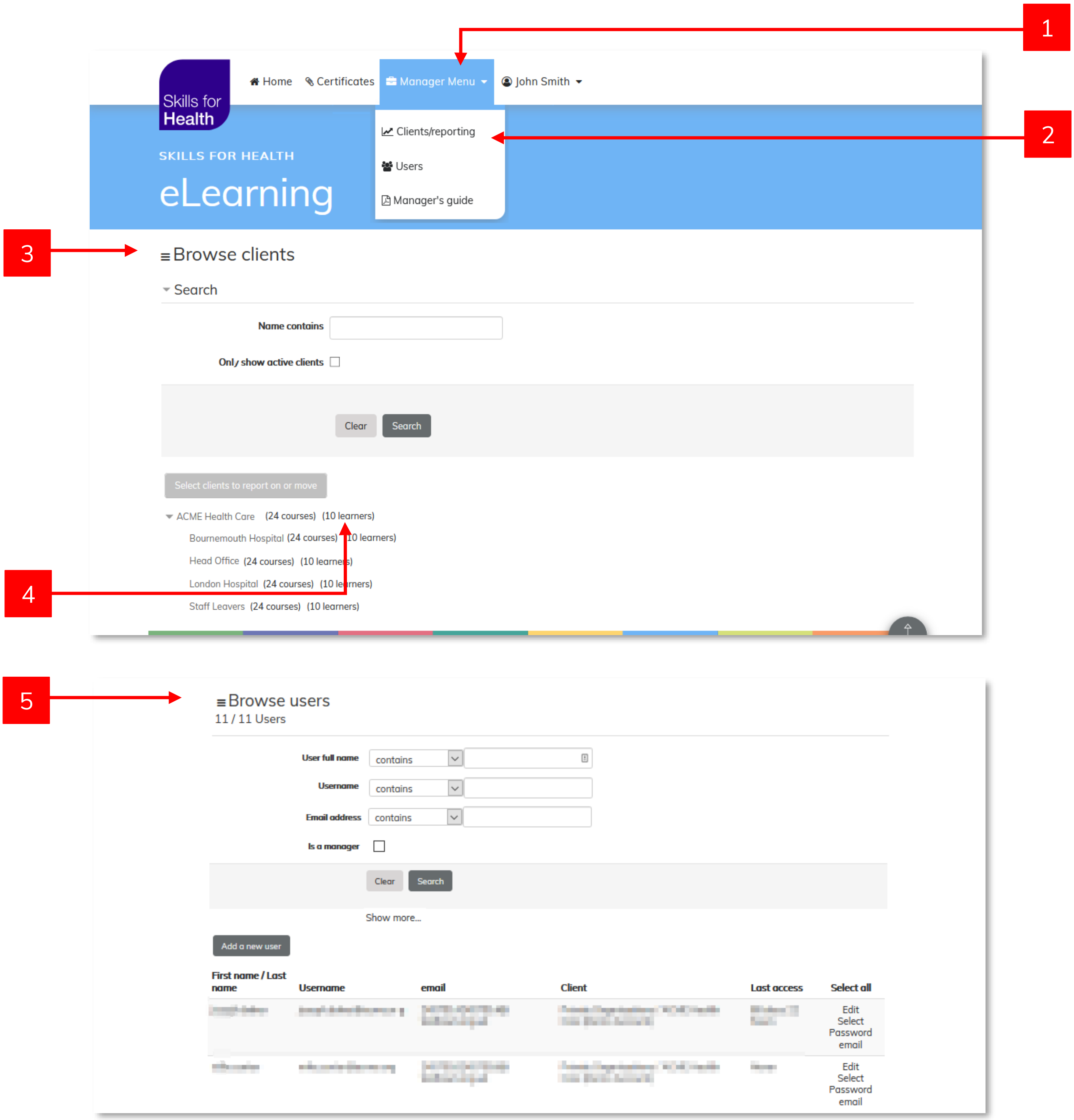




Viewing learner information for groups you manage

These instructions detail how to view a list of learners in a group you manage.

1. Navigate to **Manager Menu** from the main menu.
2. Select **Clients/reporting** from the drop-down.
3. The **Browse clients** screen provides a hierarchical list of groups you manage.
4. To view the learners within a group, select **Learners** besides the group name. The number shown is the total learners in this group.
5. A list of all learners in this group will be viewable **on screen**.



Reporting

As a manager, you can view detailed reports on groups you manage, such as details of learners and their progress with assigned courses.

These instructions outline:

- how to select the groups you would like to report on.
- how to choose what to include in your report.
- how to download your report to view in Excel.

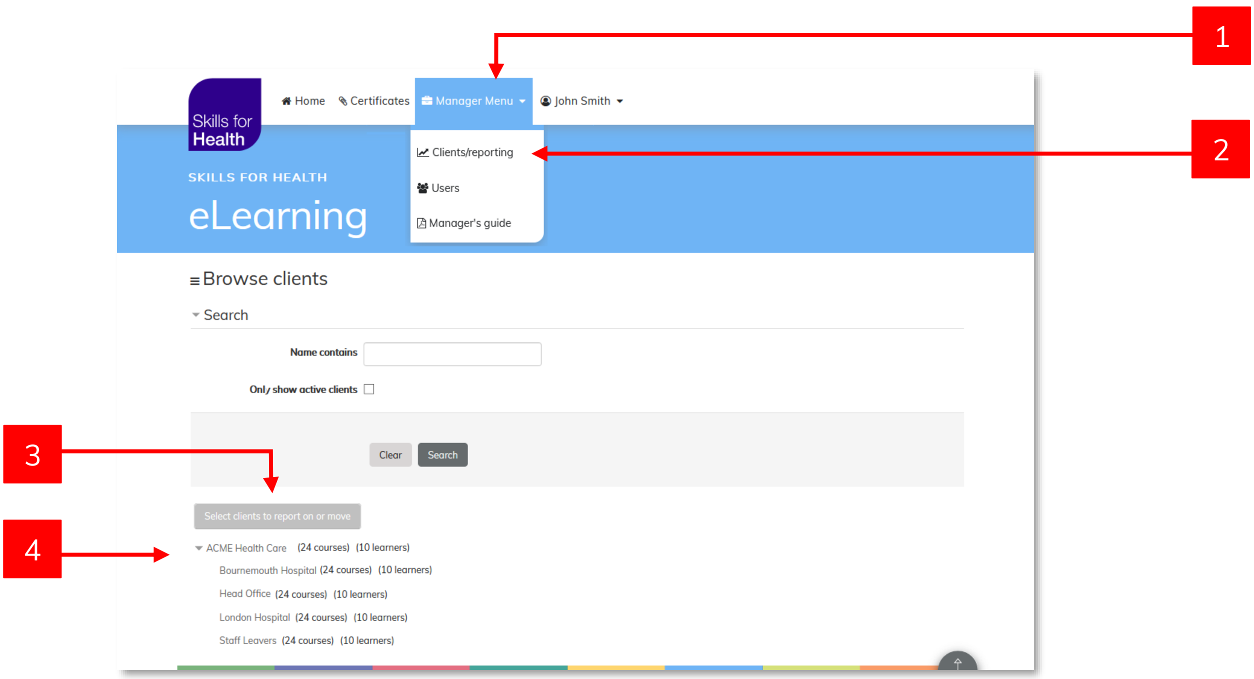
Running and downloading a report involves three steps:

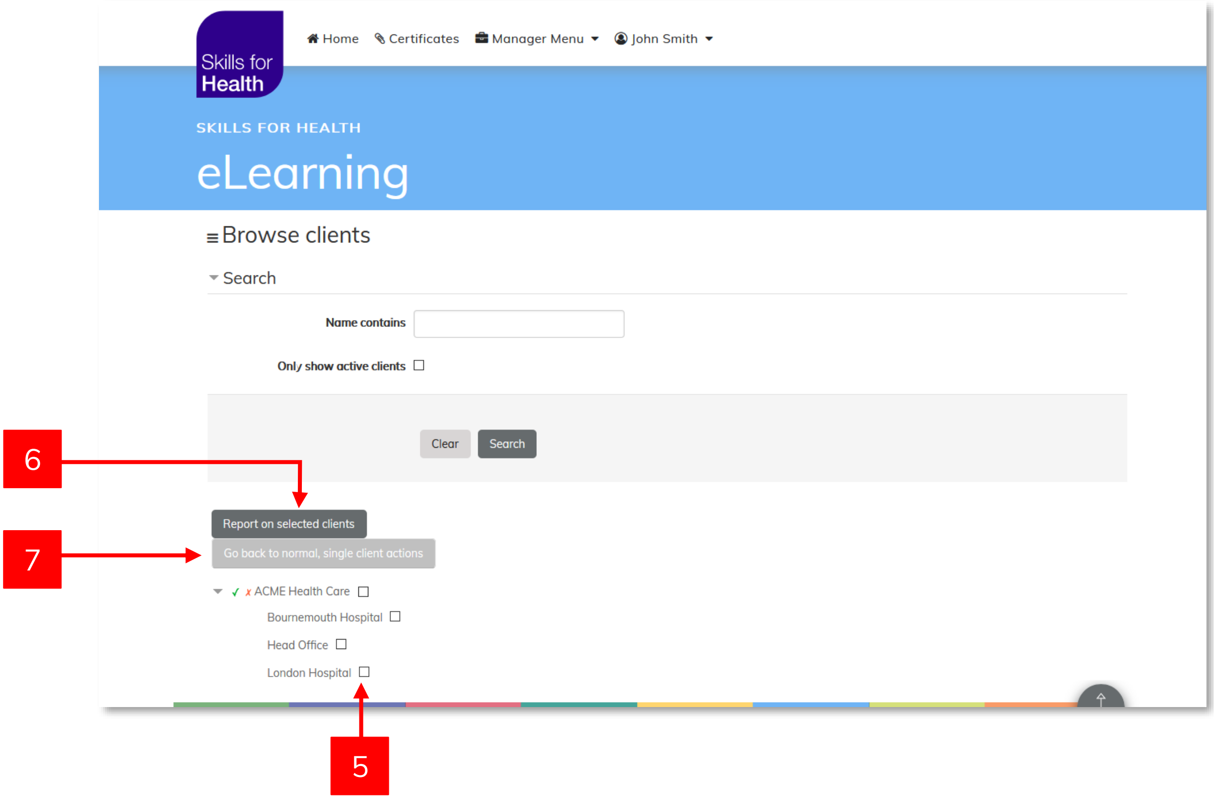
1. Selecting groups to report on.
2. Choosing the report type.
3. Viewing and downloading a report.

1. Selecting groups to report on

To create a report, you will first need to identify which client user group or groups to include in your report.

1. Navigate to **Manager Menu** on the main menu.
2. Select **Clients/reporting** from the drop-down.
3. Click **Select clients to report on or move**.
4. If your client user groups contain sub-groups, you can expand the list by clicking the **arrow** next to the top-level group.
5. Use the **checkboxes** to select the group or groups you would like to include in your report.
6. Once you have selected the clients you wish to run a report on, click **Report on selected clients**. This will open the **reporting options** screen (continue to choosing the report type).
7. To return to the **Browse clients** page click **Go back to normal, single client actions**.

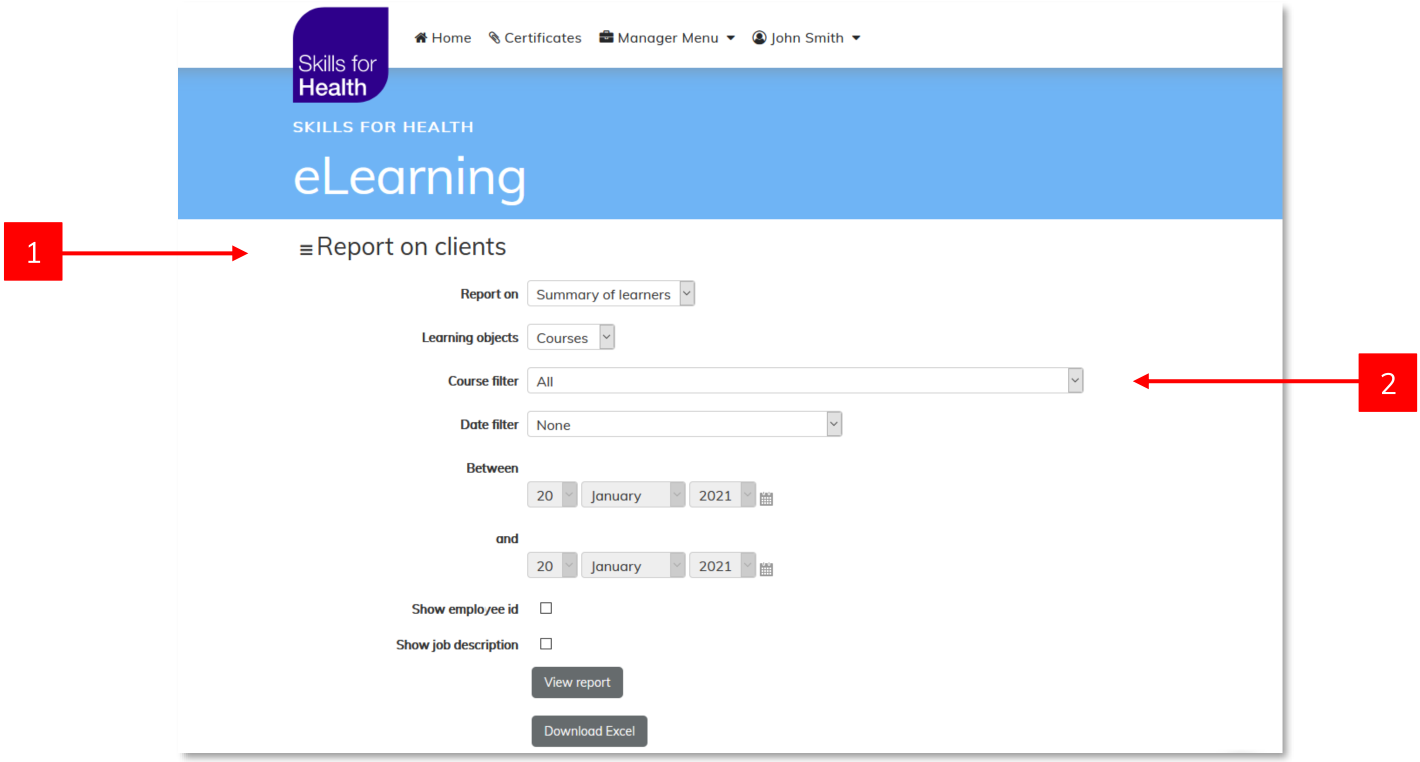



Home
Certificates
Manager Menu
John Smith
Skills for Health
SKILLS FOR HEALTH
eLearning
Browse clients
Search
Name contains
Only show active clients
Clear
Search
Report on selected clients
Go back to normal, single client actions
ACME Health Care
Bournemouth Hospital
Head Office
London Hospital
6
7
5

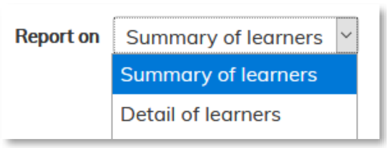
2. Choosing the report type

These instructions assume that you have identified the client user groups (step 1) that you would like to report on and that you are now ready to choose what records to include in your report.

1. Use the **report on clients screen** to select the relevant information for your report. The options include drop-down menus to select from.
2. To view the drop-down menus, click on the **arrow** beside the lists.

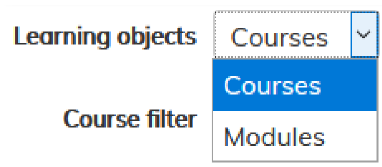


Report on



1. **Summary of learners** – select this if you want to see an overview of learner information e.g. total time on the platform studying, total number of courses/modules in progress or completed.
2. **Detail of learners** – select this if you want to see detailed information on learners e.g. individual time spent for each module or course or whether they are in progress or have completed a course.

Learning objects



1. **Courses** – If you only want to see course information for learners, select this option.
2. **Modules** – If you also want to see information on the modules for each course, for learners, select this option.

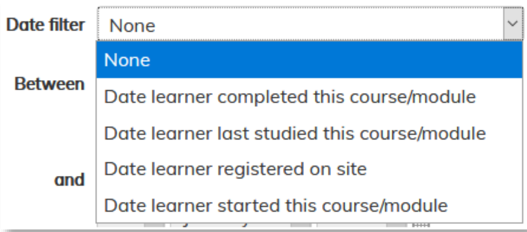
Course filter

1. Select a **Course** from the drop-down to include only information on a specific course in your report. Hold shift to select multiple courses. If you do not select any courses, your report will contain details on all courses relevant to the user group/s in your report.

Date filter

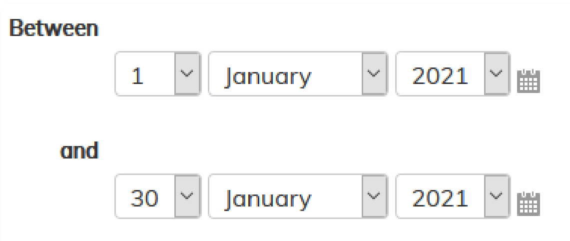
You may want to see specific details of dates that learners have used the platform or taken courses.

1. **Date learner completed this course/module** – select to view details of courses your learners have completed.
2. **Date learner last studied this course/module** – select to view details of learner progress with courses, including courses in progress and completed.
3. **Date learner registered on site** – select to view details of when your learners were created.
4. **Date learner started this course/module** – select to view details of when your learners first started a specific course.



Date options

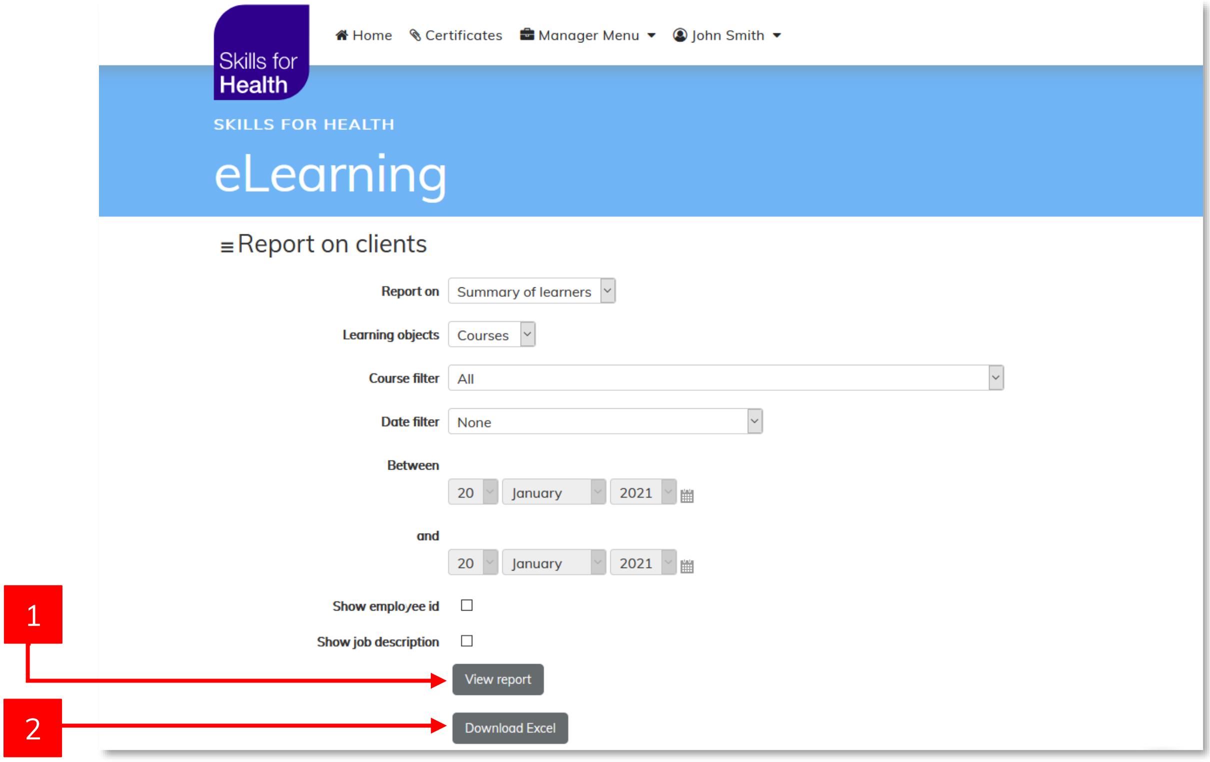
1. To use the date filter, you will also need to select the **time period** you want the data to include, e.g., if you have selected **Date learner started this course/ module** on the date filter, you may want to view this information from 1st to 30th January only.
2. You can select the **dates** by using the drop-down, or by clicking the **calendar** icon.



3. Viewing and downloading a report

These instructions assume that you have chosen client user groups that you would like to report on and have selected what data to include in your report. The next step is to view your report online or download a copy to view in Excel.

1. Select **View Report** to view your report online. Your report will display **on screen**.
2. Select **Download Excel** to download a copy of your report to view in Excel. Your download will start in your internet browser.



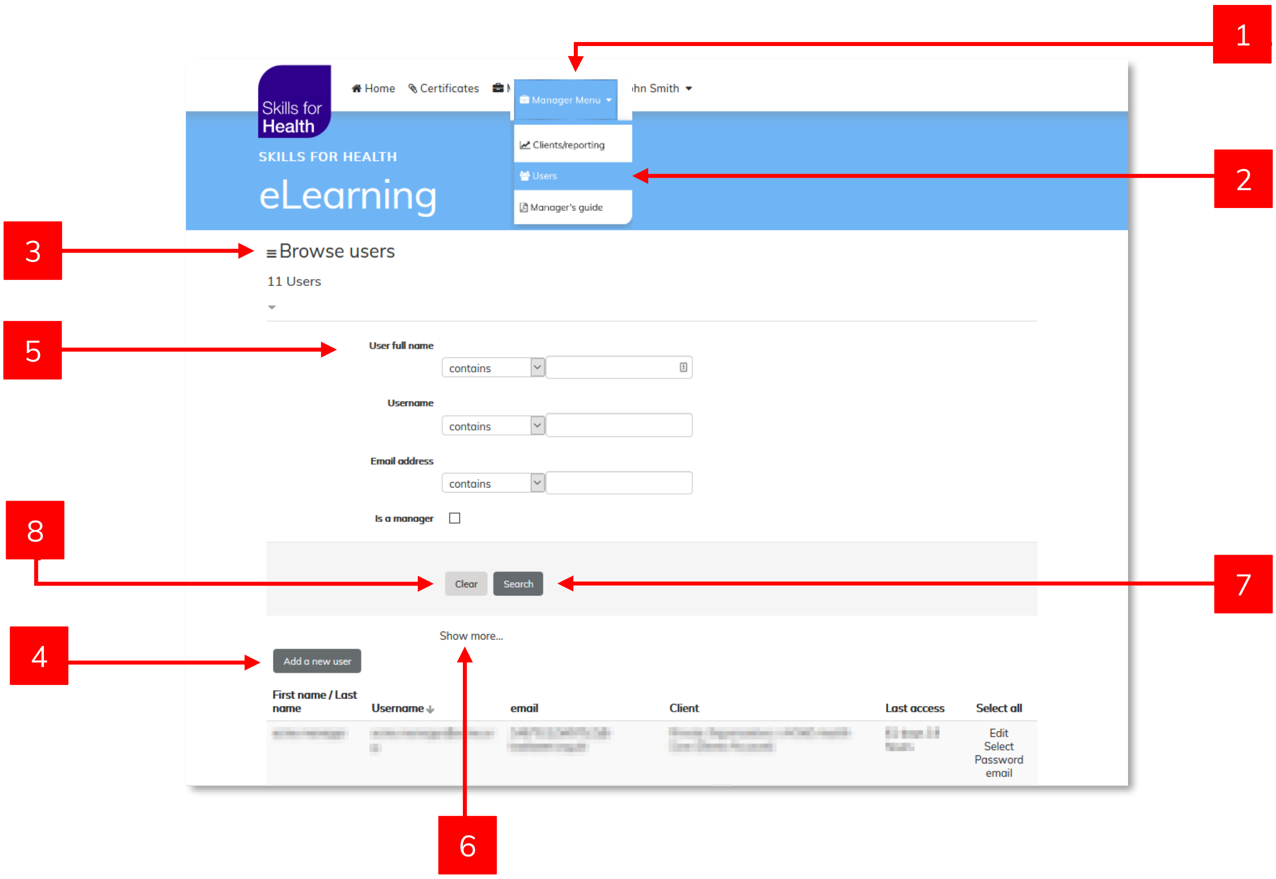
Managing your users

As a manager, you can add learners to the platform and provide them with courses to complete. From time to time you may also need to update learner details, such as their email address. This section provides step by step instructions on managing your learners and their courses.

Browsing and searching for users

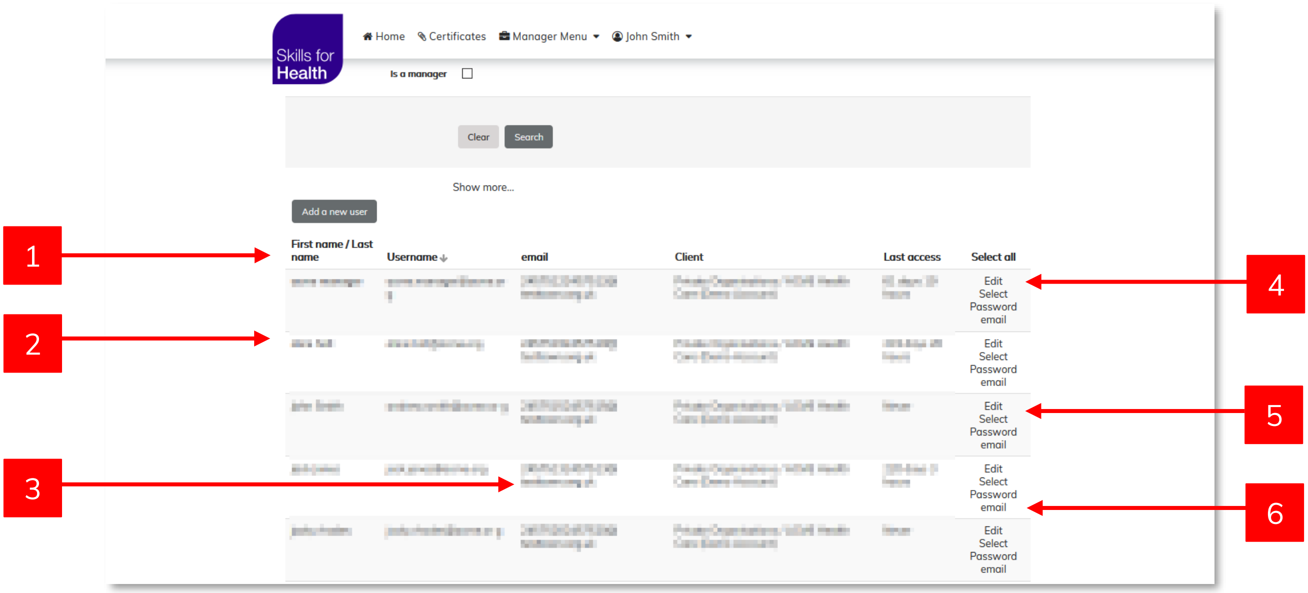
Browse or search for users to locate the learner you would like to manage.

1. Navigate to **Manager menu** on the main menu.
2. Select **Users** from the drop-down.
3. The following screen allows you to **browse users** you manage.
4. From this screen you can also **add new users** to the groups you manage.
5. Perform a basic search for users by entering the user's full name, username, or email address into the **search boxes**.
6. For an advanced search click **show more.** This gives you more search options to help you locate your learner, such as the date they last accessed the platform.
7. When you have input all search requirements, click **Search** to display the results you requested. Your results will be displayed **on screen.**
8. To return to browsing all users, click **Clear.**



User search results

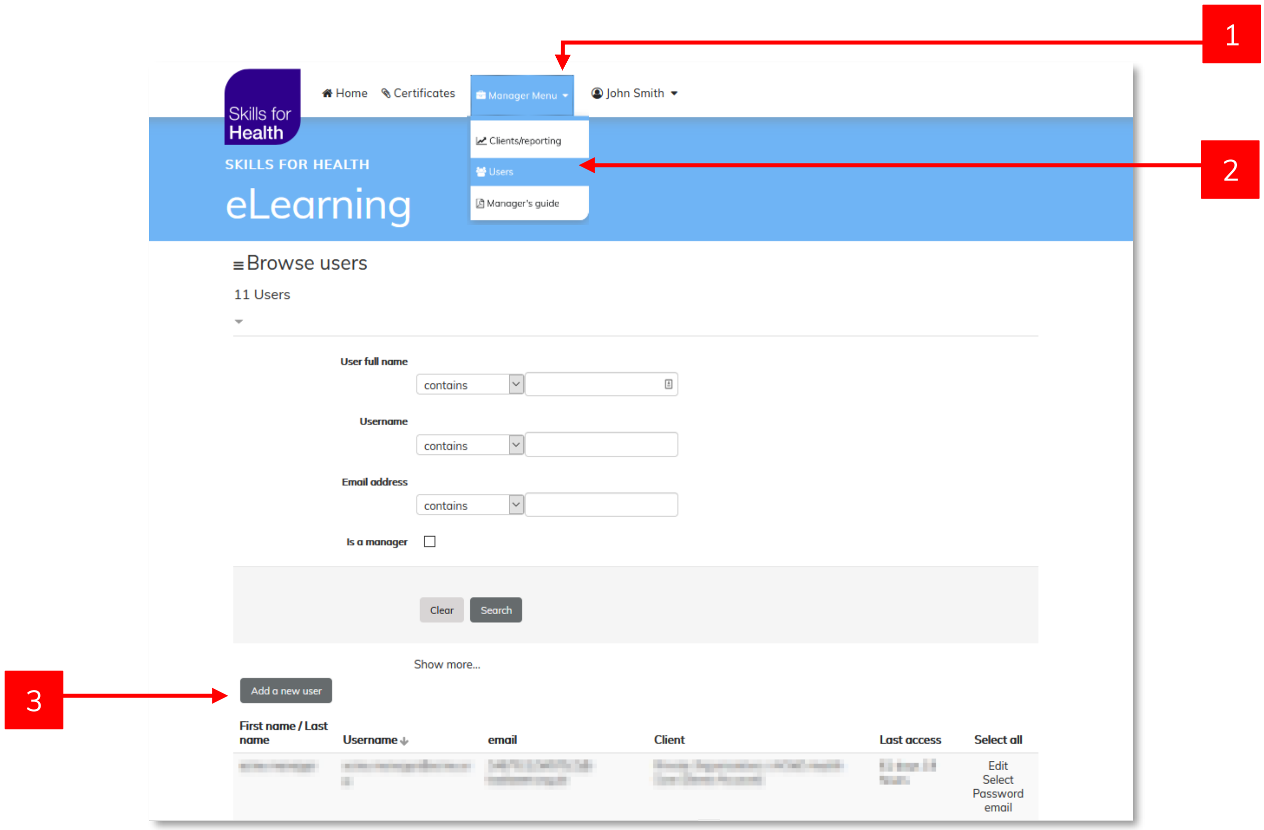
1. You can reorder your list of users by clicking on any of the **headings** at the top of the table.
2. To view a user's profile, you can click on their **full name**.
3. To email a user, click on their **email address.** This will open your default email program.
4. To edit a user's profile, click **Edit.**
5. To select and move a user to another group, click **Select**.
6. To send an email to a user so they can reset their password, click **Password email.**

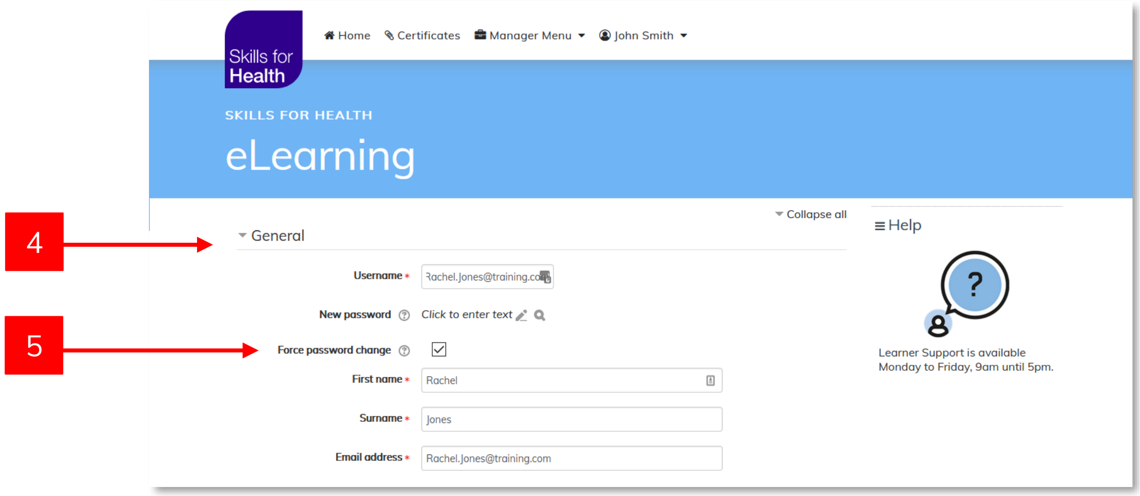


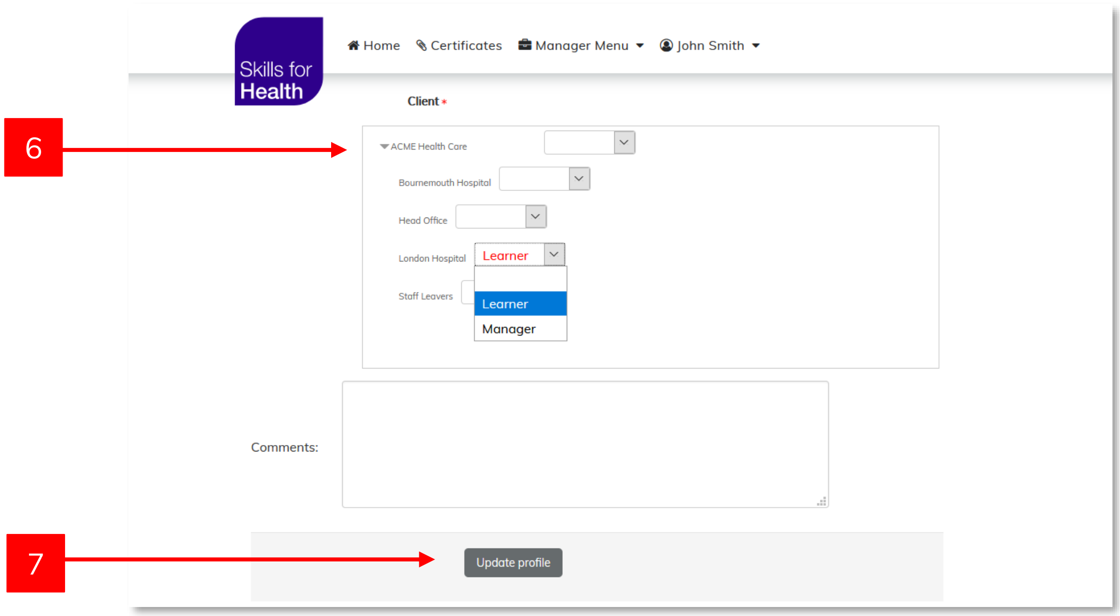
Adding a new user

To add a new user you first need to complete the learner's general details. The second step is to assign them to a user group to make the correct set of courses available to them.

1. Navigate to **Manager menu** on the main menu.
2. Select **Users** from the drop-down.
3. Click **Add a new user**. Please note users can only be added once.
4. Complete the **general details form**.
    1. We recommend using the learner's email address as their username.
    2. Required fields are marked with a **red ***.
5. Select **Force password change** to prompt the user to reset their password upon first login.
6. **Scroll down** to view the client **user groups you manage**. Use the **drop-downs** to add your **learner** to the correct group.
7. When complete, click **Update profile**.



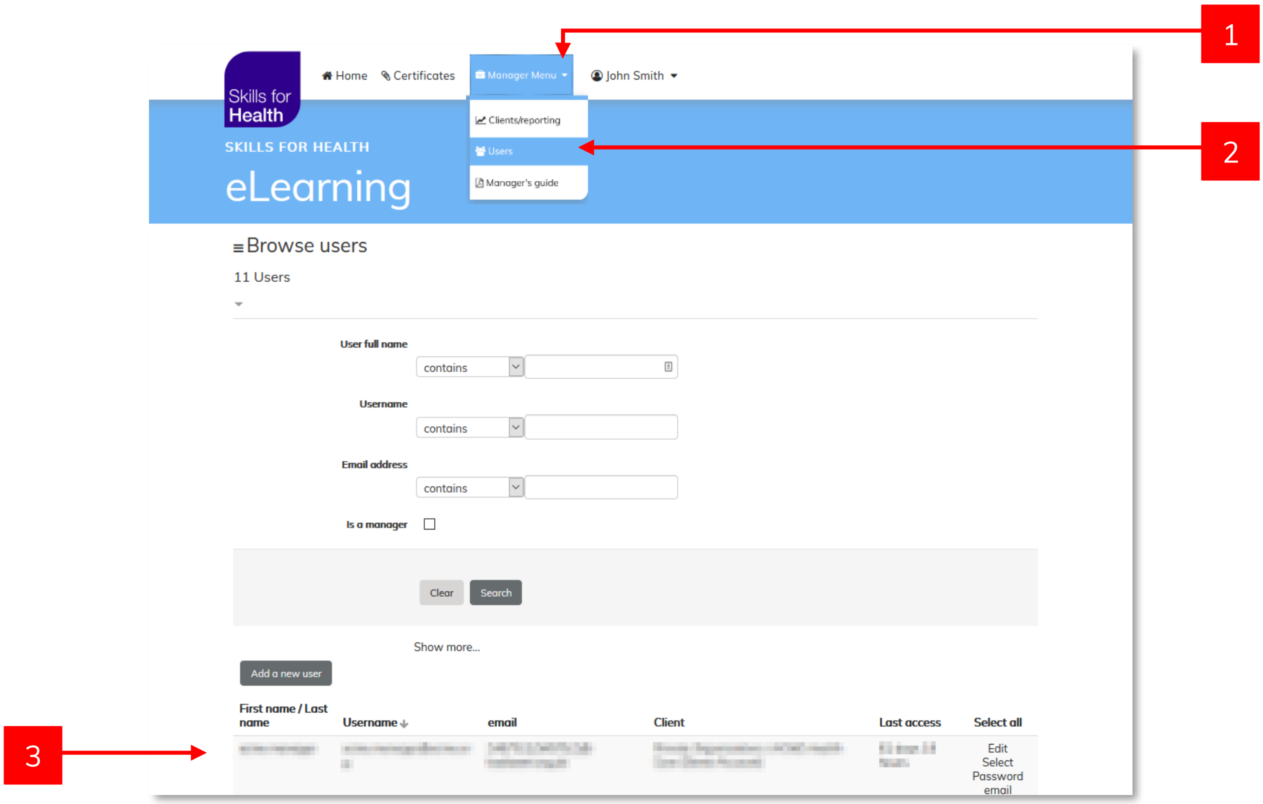

4
5
Skills for Health
Home
Certificates
Manager Menu
John Smith
SKILLS FOR HEALTH
eLearning
Collapse all
General
Username
Rachel.Jones@training.com
New password
Click to enter text
Force password change
First name
Rachel
Surname
Jones
Email address
Rachel.Jones@training.com
Help
Learner Support is available Monday to Friday, 9am until 5pm.

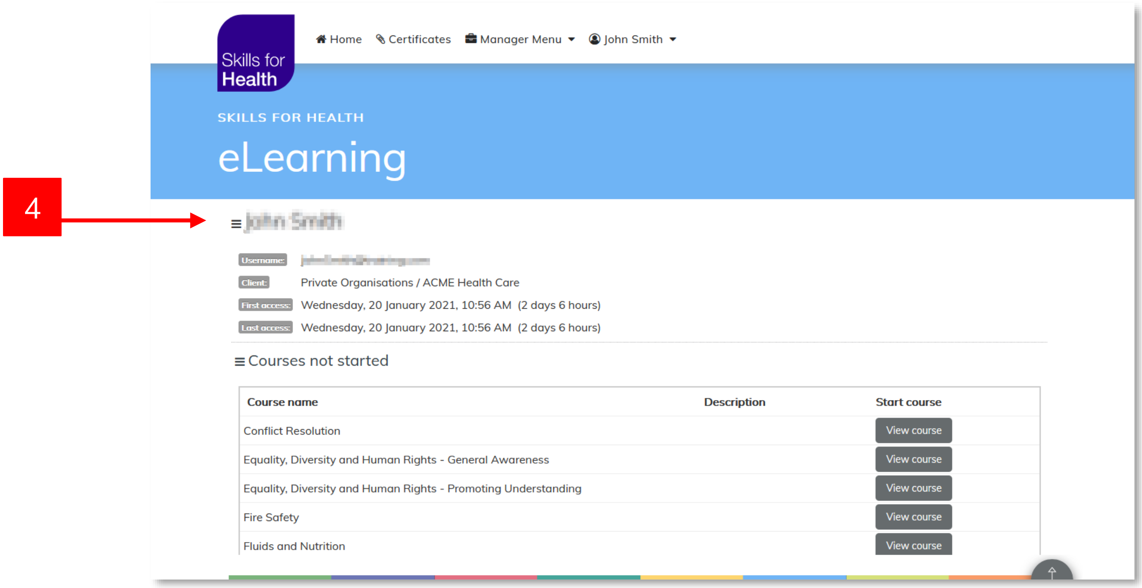

6
7
Skills for Health
Home
Certificates
Manager Menu
John Smith
Client
ACME Health Care
Bournemouth Hospital
Head Office
London Hospital
Learner
Staff Leavers
Learner
Manager
Comments:
Update profile

Viewing a user’s profile and course progress

As a manager, you can select any of the users you manage to see an overview of their profile and their available courses.

1. Navigate to **Manager menu** on the main menu.
2. Select **Users** from the drop-down.
3. To view a user’s profile, click their **full name.**
4. This will take you to the **user’s profile screen** where you can view the user’s profile information, **courses started** and **courses available** to them.

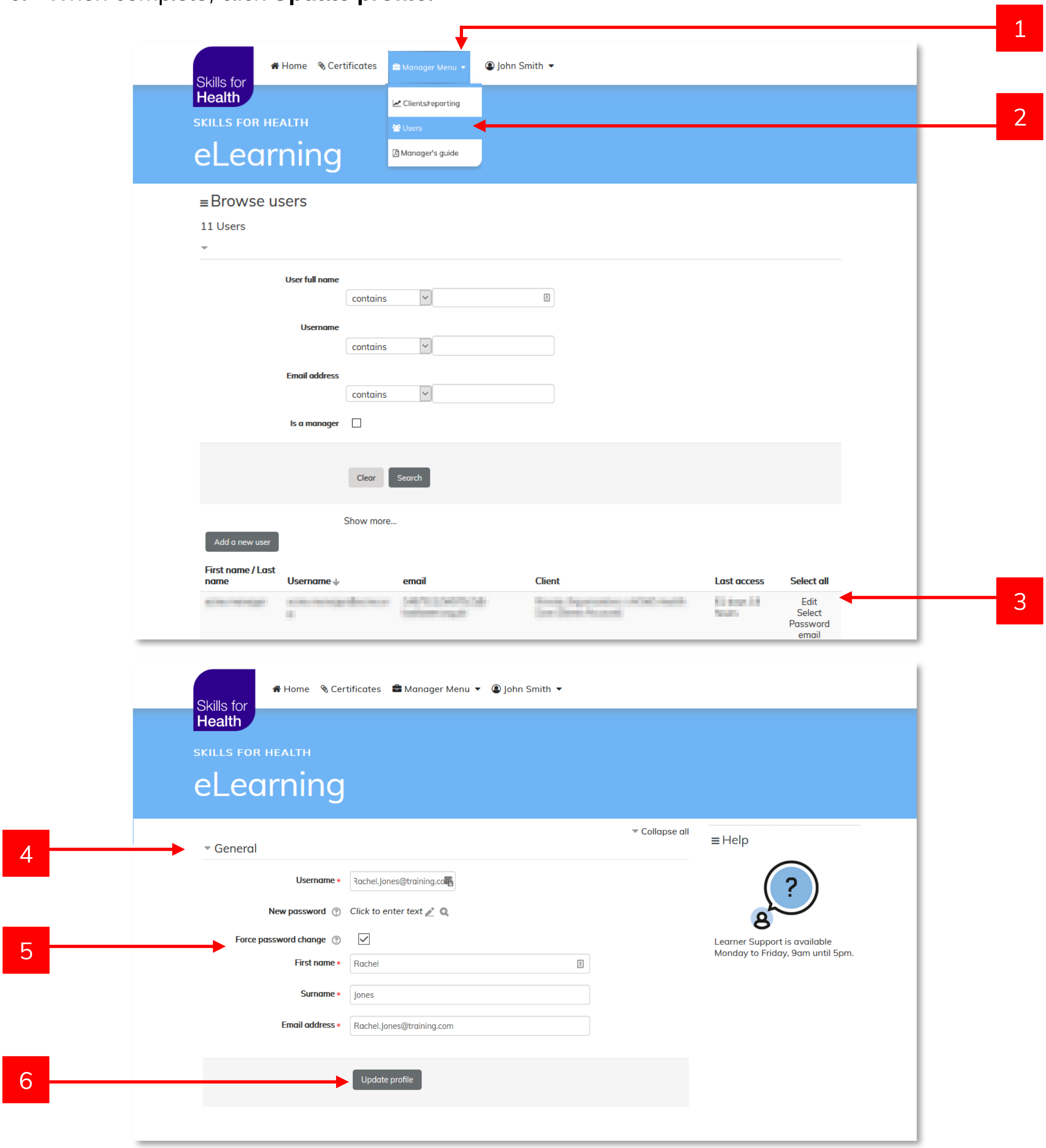




Editing a user's profile

As a manager you may need to edit a user's details, such as their email address or password.

1. Navigate to **Manager menu** on the main menu.
2. Select **Users** from the drop-down.
3. Click **Edit** beside the name of the user.
4. Amend a user's **general details** using the form available.
5. Select **Force password change** to prompt the user to reset their password upon their next login.
6. When complete, click **Update profile**.



Assigning a manager to a user group

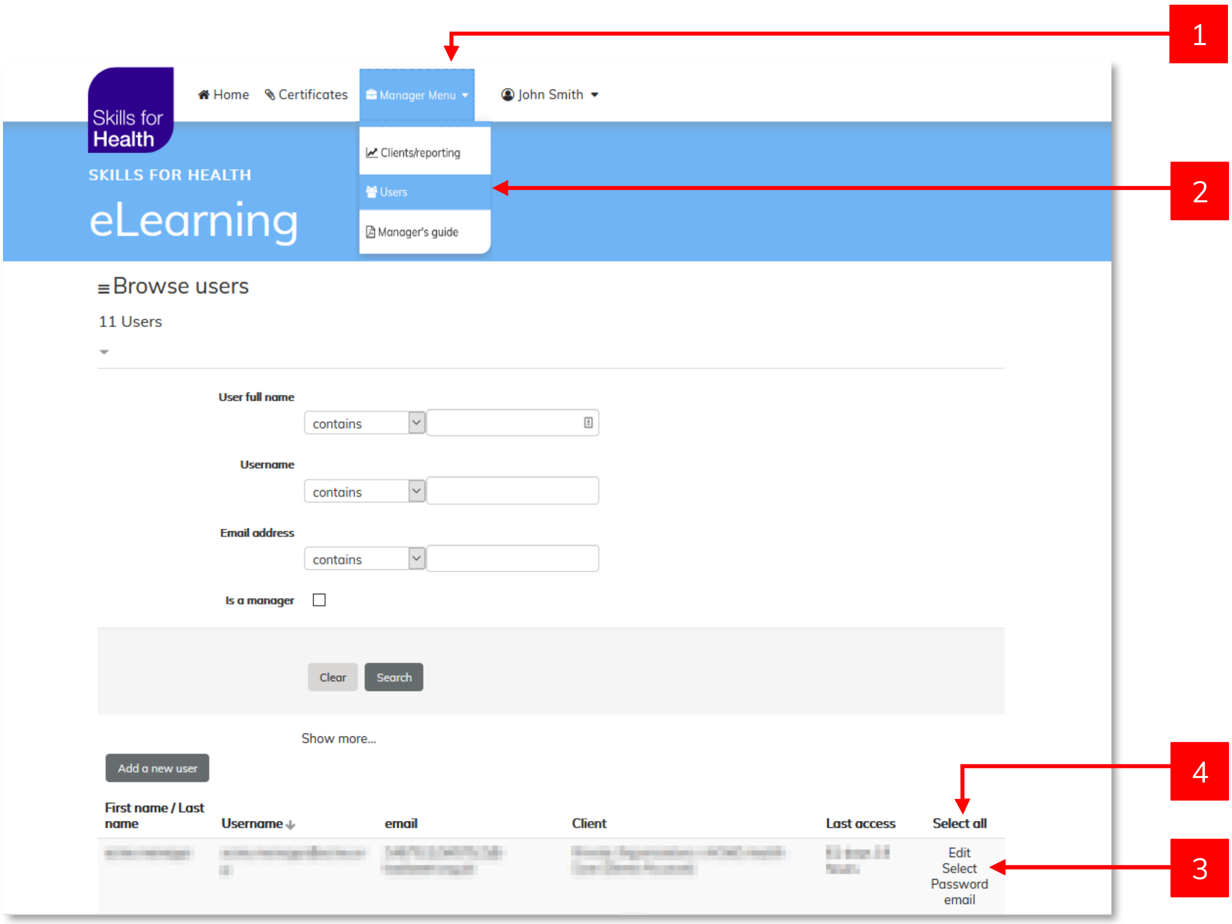
Managers can view, edit and generate reports on users within the groups and subgroups that they manage. To assign the Manager permission to another user you must be a manager.

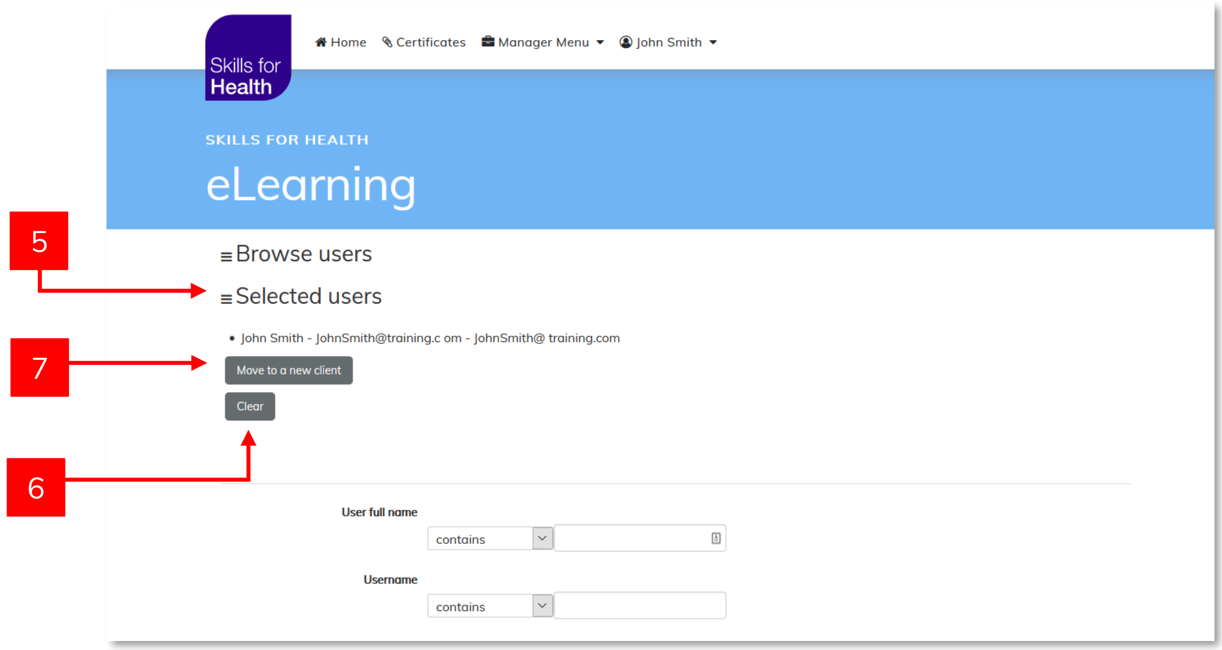
1. Navigate to **Manager menu** on the main menu.
2. Select **Users** from the drop-down.
3. Click **Edit** beside the name of the user you would like to assign as a manager.
4. **Scroll down** to view the client **user groups you manage**.
5. Use the **drop-downs** to assign your user as a **manager** to the correct group.
6. A user can belong to more than one group, e.g., a user can be a learner in one group, and a manager in another. Assigning a manager to the top-level group will allow them to view and manage users in all sub-groups.
7. When complete, click **Update profile**.

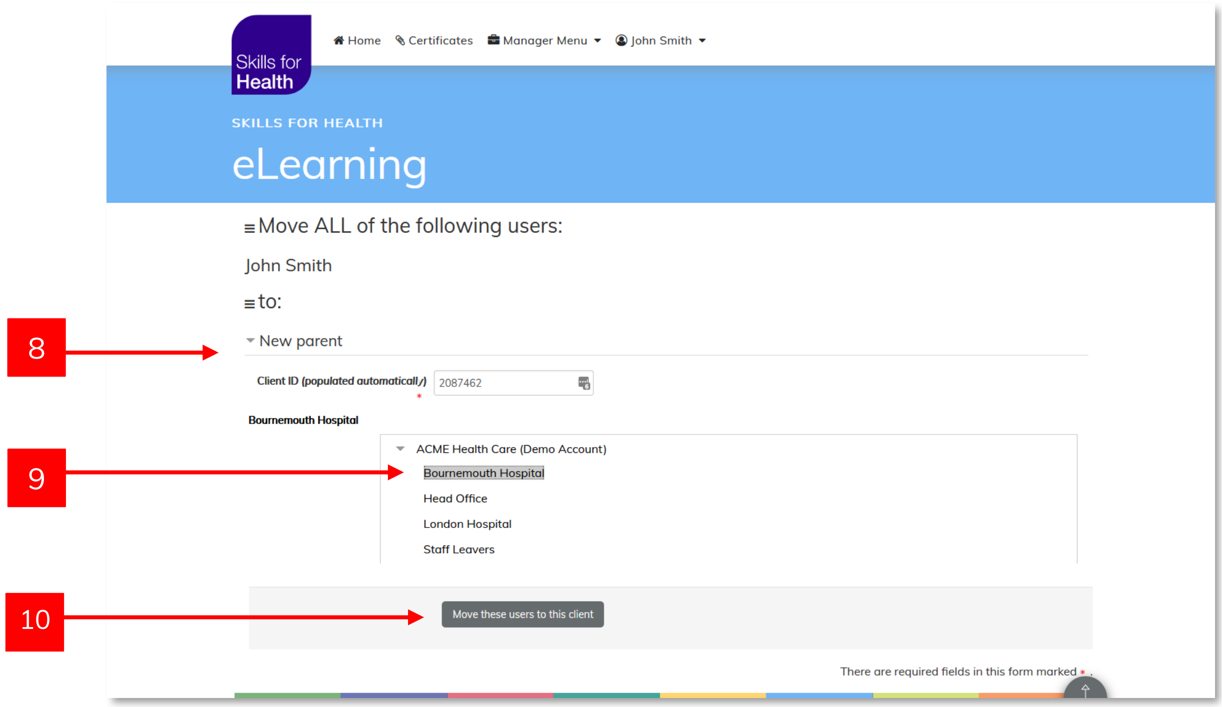
Moving users to another group

Follow these instructions to change the group that one or more of your users belong to. Moving a user to another group will change the set of courses that they have available to complete.

1. Navigate to **Manager menu** on the main menu.
2. Select **Users** from the drop-down.
3. Locate the required user and click **Select** beside the name of the user.
4. To move all users, click **Select all**. This will only select users displayed on the **current page.**
5. Users you select will appear in a list at the **top of the page**.
6. To clear the selected users, and start your list again, click **Clear**.
7. When you have selected all users you wish to move, click **Move to a new client.**
8. A new **screen** will appear with the list of **client groups you manage**.
9. To move the users to the new client group, select the name of the **new client group**.
10. Click **move these learners to the client**. The users will now only view the courses assigned to this group.



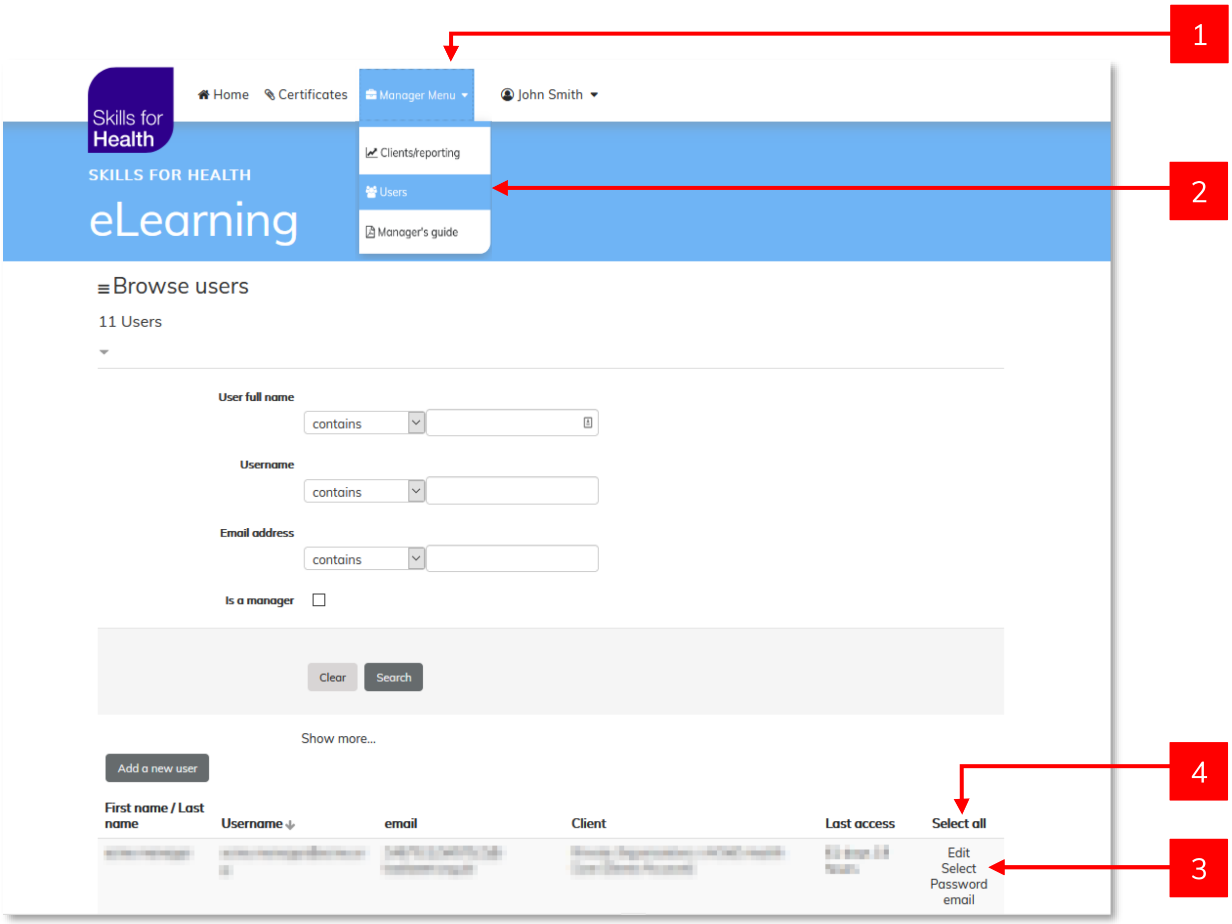

Home
Certificates
Manager Menu
John Smith
Skills for Health
SKILLS FOR HEALTH
eLearning
5
Browse users
Selected users
7
John Smith - JohnSmith@training.c om - JohnSmith@ training.com
Move to a new client
Clear
6
User full name
contains
Username
contains

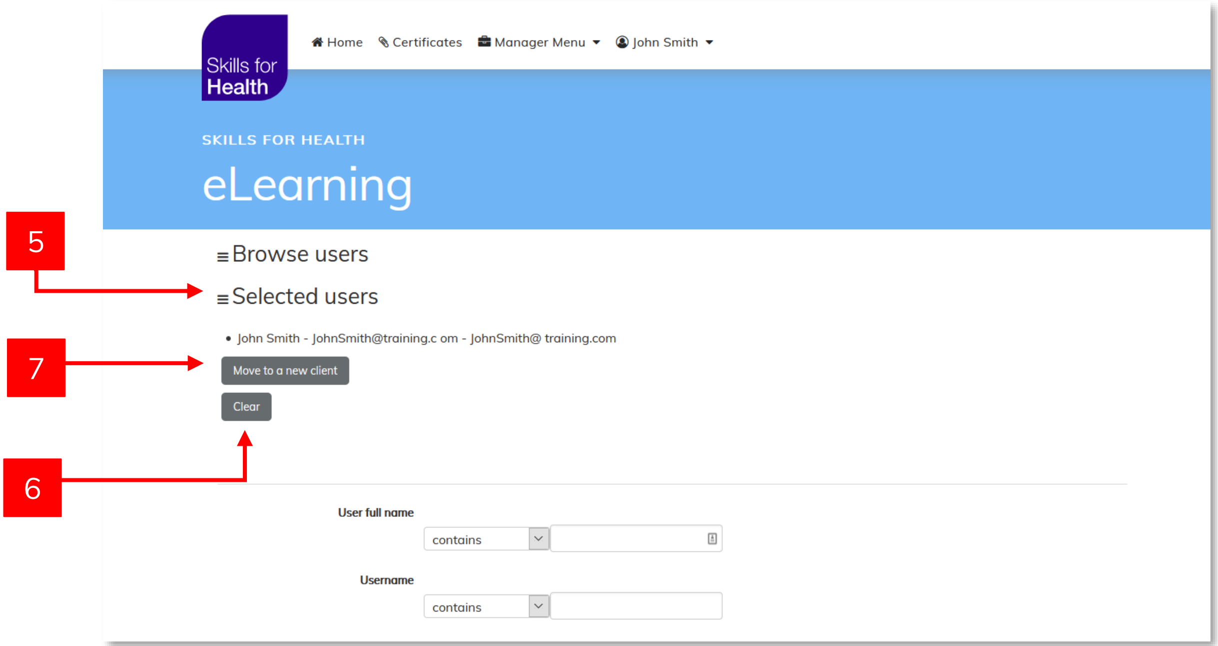

Home
Certificates
Manager Menu
John Smith
Skills for Health
SKILLS FOR HEALTH
eLearning
Move ALL of the following users:
John Smith
to:
8
New parent
Client ID (populated automatically)
2087462
Bournemouth Hospital
9
ACME Health Care (Demo Account)
Bournemouth Hospital
Head Office
London Hospital
Staff Leavers
10
Move these users to this client
There are required fields in this form marked

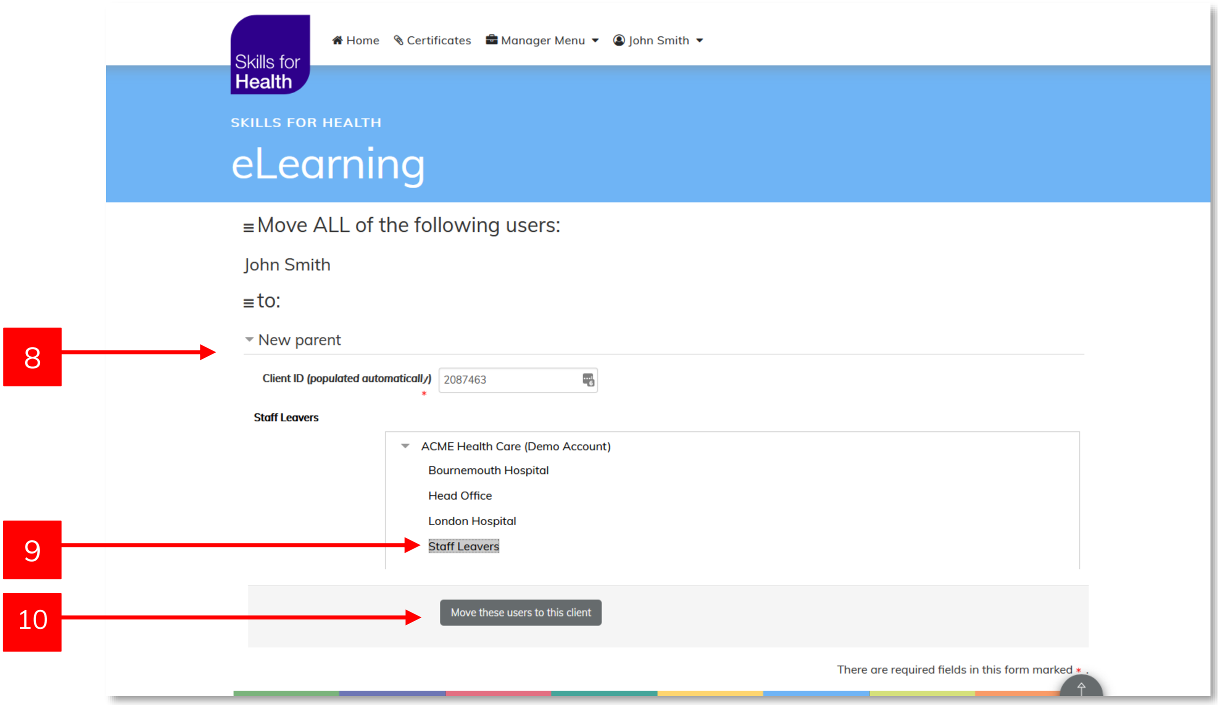
Archiving a user

Follow these instructions to move one or more of your users to an archive group. If you do not have an archive group, please contact Skills for Health support.

1. Navigate to **Manager menu** on the main menu.
2. Select **Users** from the drop-down.
3. Click **Select** beside the name of the user.
4. To move all users, click **Select all**. This will only select users displayed on the **current page.**
5. Users you select will appear in a list at the **top of the page**.
6. To clear the selected users, and start your list again, click **Clear**.
7. When you have selected all users you wish to archive, click **Move to a new client.**
8. A new **screen** will appear with the list of **client groups you manage**.
9. Select the **archive group**. In this example, we are moving users to the **Staff Leavers** group.
10. Click **move these learners to the client**. The users you have moved to the archive group will now have no courses available to complete.




Home
Certificates
Manager Menu
John Smith
Skills for Health
SKILLS FOR HEALTH
eLearning
5
Browse users
Selected users
7
John Smith - JohnSmith@training.c om - JohnSmith@ training.com
Move to a new client
Clear
6
User full name
contains
Username
contains


Home
Certificates
Manager Menu
John Smith
Skills for Health
SKILLS FOR HEALTH
eLearning
Move ALL of the following users:
John Smith
to:
8
New parent
Client ID (populated automatically)
2087463
Staff Leavers
ACME Health Care (Demo Account)
Bournemouth Hospital
Head Office
London Hospital
9
Staff Leavers
10
Move these users to this client
There are required fields in this form marked

Skills for Health (Head Office)
4th Floor, 1 Temple Way,
Bristol, BS2 0BY

E-mail: contactus@skillsforhealth.org.uk
Website: skillsforhealth.org.uk