Hampshire Services
HIAS SCHOOL IMPROVEMENT

SERVICES FOR SCHOOLS

New Learning Zone

Getting Started

Guidance for Hampshire Maintained Schools

Hampshire County Council

www.hants.gov.uk

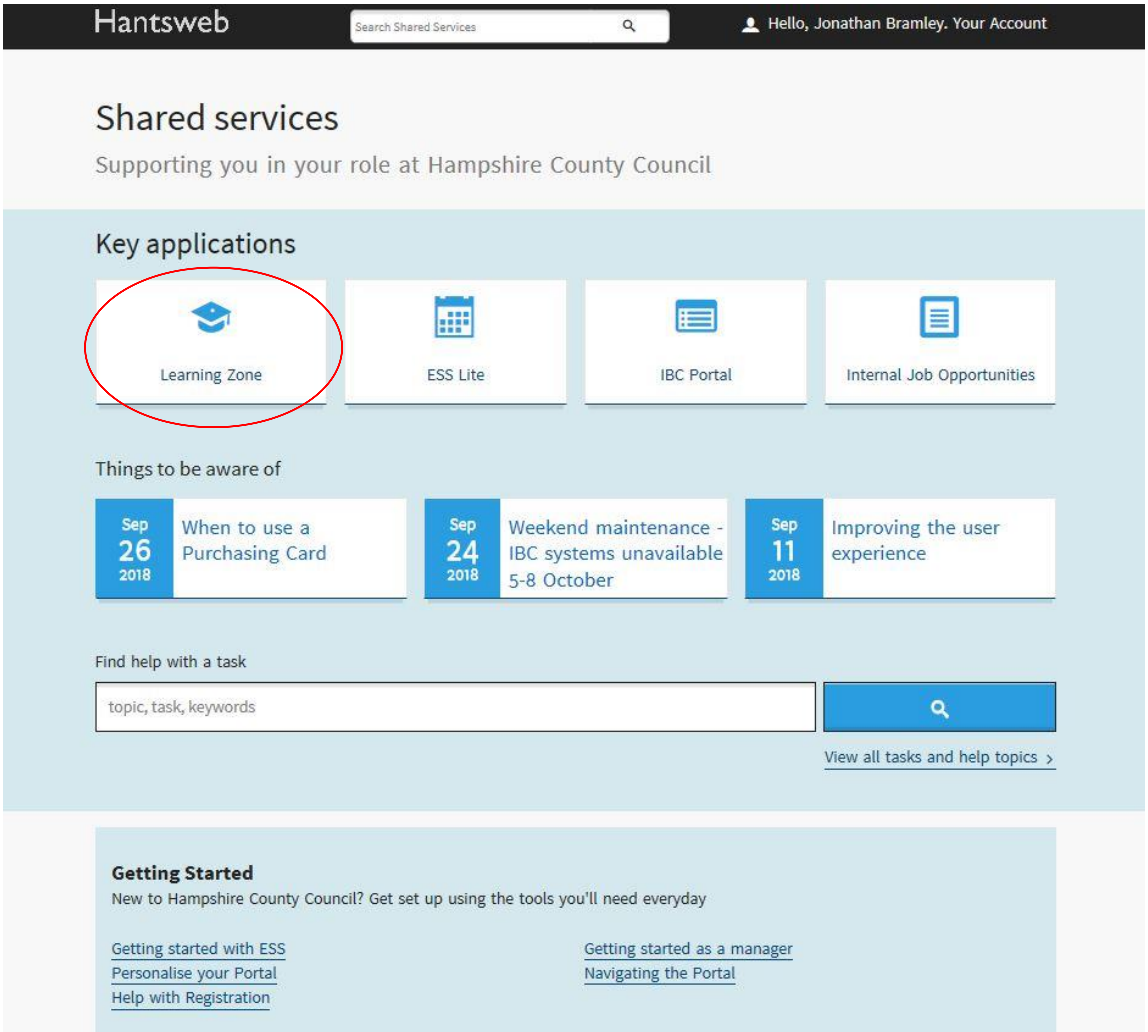
Contents

Accessing the Learning Zone

For Hampshire maintained schools, access to the Learning Zone is via the Hampshire County Council shared services web page

https://extra.hants.gov.uk/sharedservices

Click on the **"Learning Zone"** tile to open up the new Learning Zone



Delegating course approvals & acting as a delegated manager

Topic

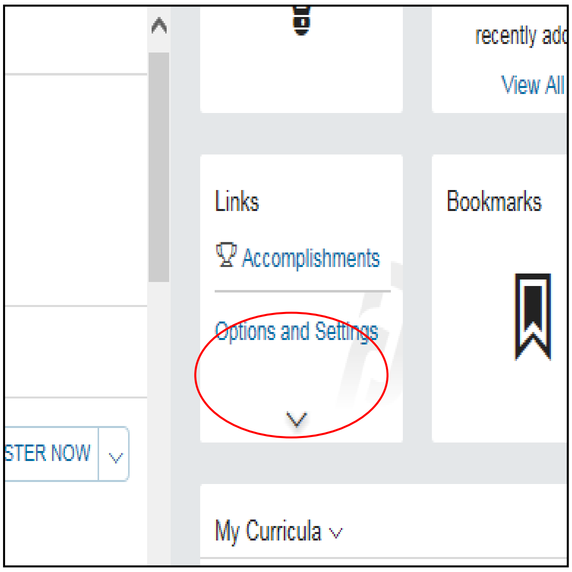
Delegate the course approvals process from a Line Manager (e.g. Headteacher) to someone who can act on their behalf (e.g. School Manager/Administrator)

Description

How to assign delegate authority to others so they can action course approvals for all employees reporting to you, permanently or temporarily,

Process

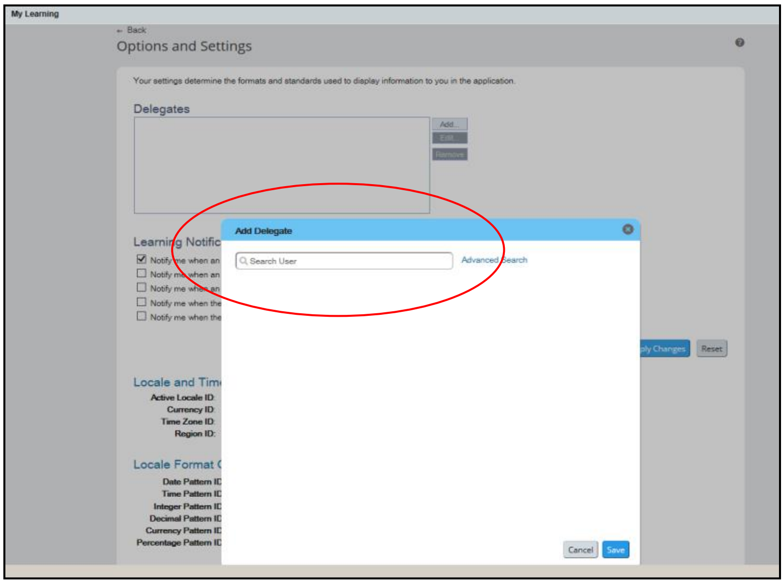
Access Hantsweb and click on **Learning Zone** tile.



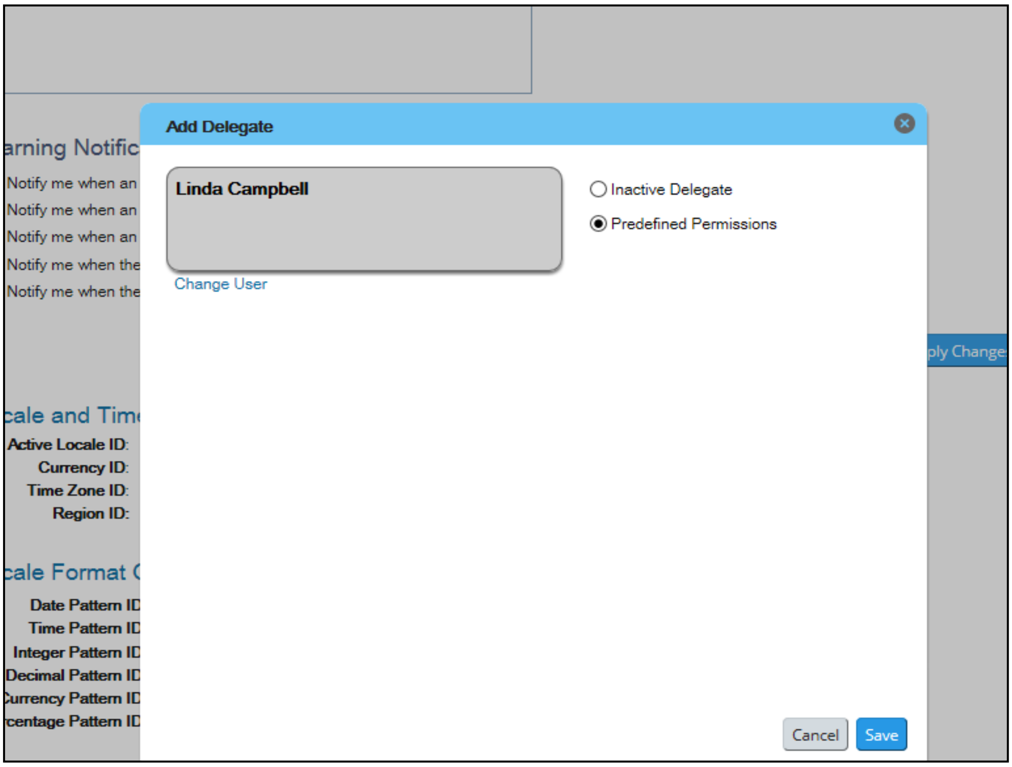
On the **My Learning** page, navigate to the **Links** section which is located underneath the ‘Learning Assignments’ box. Click on **Options and Settings.** The **Options & Settings** page will display.

Click the **Add** button in the **Delegates** area and the **Add Delegate** page will open.

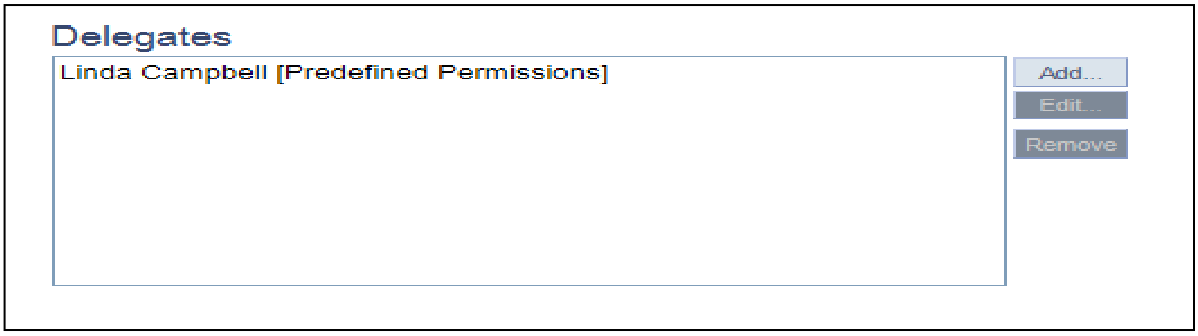
Use the search box to find and select the person you want to delegate for you. You can also use the **Advanced Search** option to find and select a delegate based on predefined criteria.



Once a delegate has been identified, select **Predefined Permissions** option for the user.



Click the **Save** button. The Delegate is now selected and permissions are assigned.



Your delegate will be shown. You can remove them by clicking REMOVE.

Once selected as a delegate, the individual will receive the following email as confirmation:

From: no-reply@hants.gov.uk [mailto:no-reply@hants.gov.uk]
Sent: 01 October 2018 13:45
To: Delegate
Subject: Delegation Assignment Notification

Dear Colleague,

This notification confirms that another user (Line, Manager) has delegated to you the following permission(s) to perform on their behalf: Proxy: Ability to perform Career, Learning, Performance, and Line Managery tasks as defined by your Admin . Please log on to your Home page in SuccessFactors to view all users from whom you have delegated permissions, or click on the following link:

https://performancemanager5.successfactors.eu/sf/learning

If you believe this assignment is incorrect, please contact this user (Line, Manager).

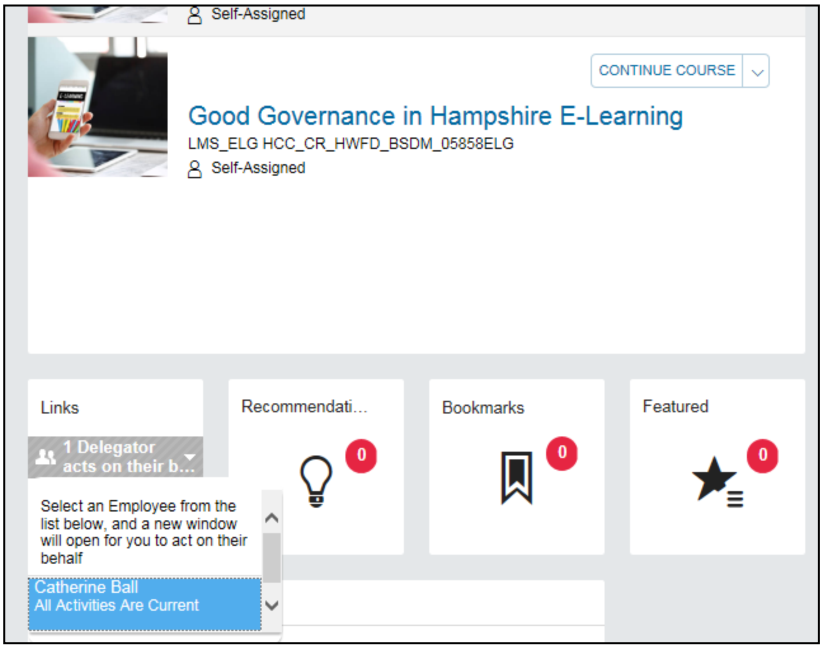
If you have any questions or need to contact your Learning Team please check the Contact Information tile on your Learning Zone homepage for further details.

Kind regards,

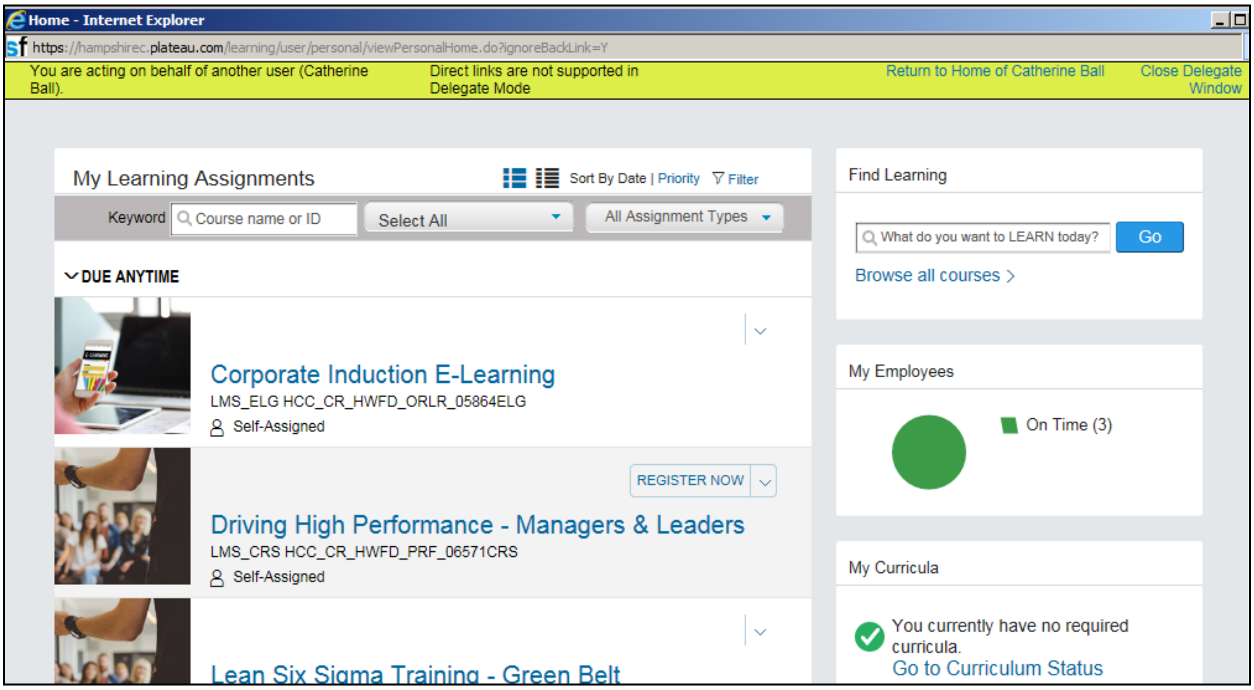
Learning Support

In order to act as the delegated manager the individual will need to follow the steps below.

Step 1: From the learning home page, go to links, then from Delegator list select the manager

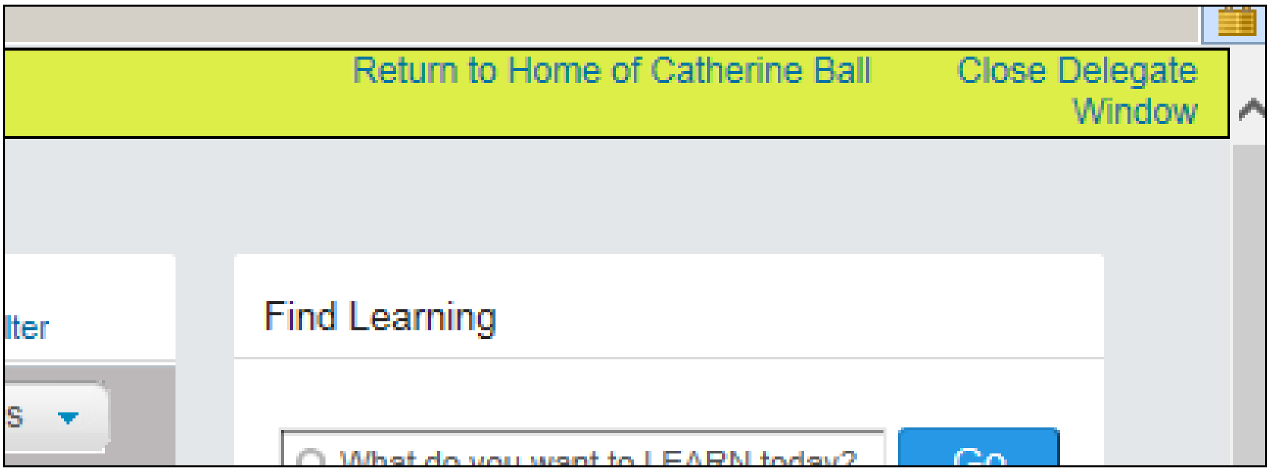


Step 2: The delegate view will open in a new window (you may have to allow pop up and then repeat step 1 above).



Step 3: Perform required tasks on behalf of the manager. Please note, the user's own My Learning Page becomes inactive whilst the delegate window is open.

Step 4: Close the delegate window when tasks are complete



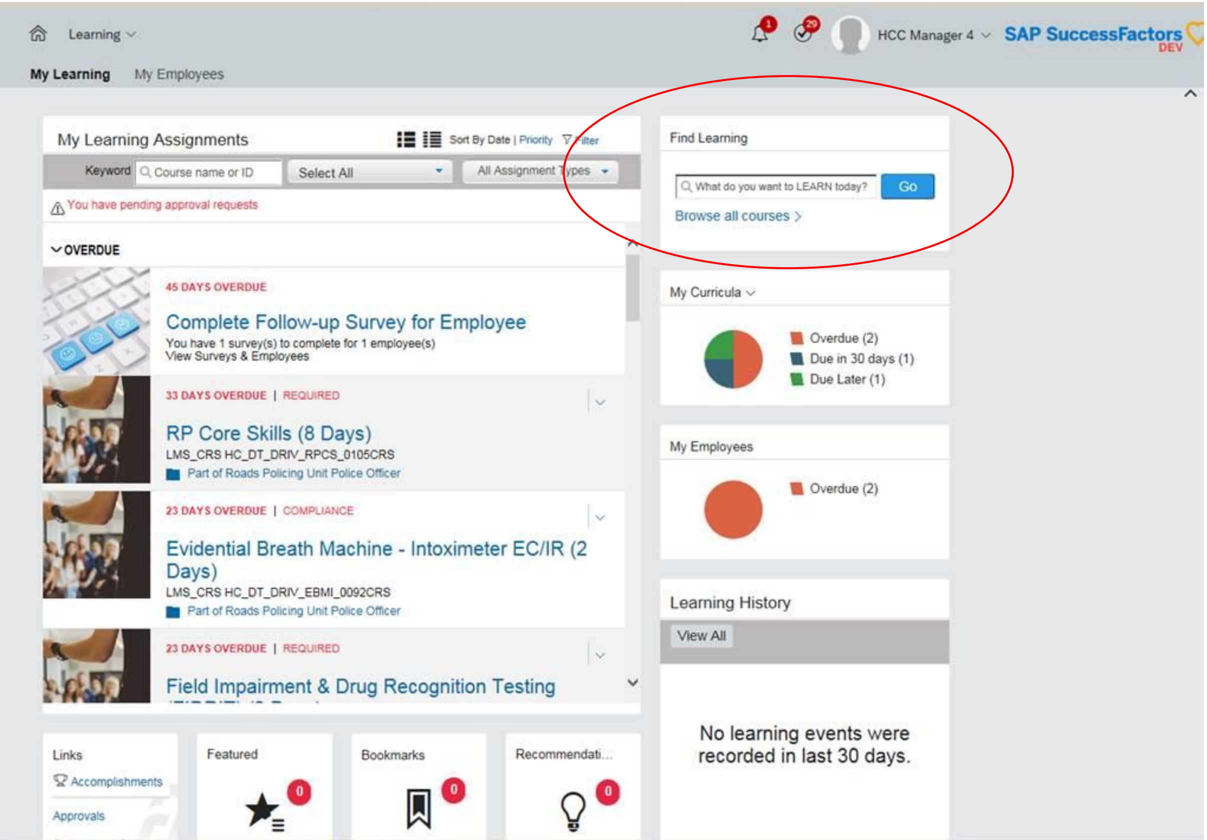
Searching the catalogue

Topic
Browse/search the LMS catalogue

Description
Searching for courses to find a scheduled offering, (instances of the courses that are available for booking) to meet your development needs.

Process
Access Hantsweb and click on the **Learning Zone** tile.

On the **My Learning** page, navigate to the **Find Learning** section on the right of the page.

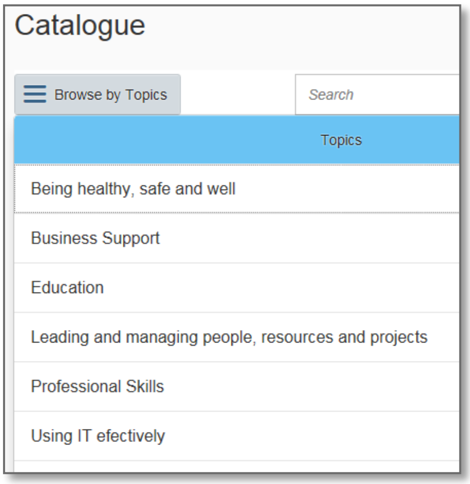


In the **Find Learning** area, you can find learning in two ways:

- If you start typing in a course name, the LMS will suggest titles based on this which you can click on to select. Then click **Go** to be taken to a results page with all relevant items, or

- You can also click on **Browse all courses**, taking you to the **Catalogue** page, where you can click on the magnifying glass in the **Search** field to see all the courses you've been given access to

Once you are on the **Catalogue** page, you can **Browse by Topic**, which allows you to look at available learning by subject area.



Once results are listed, you can filter these further, by **category** and **delivery method** using the drop-down options under the **Refine By** heading on the left.

Once you have found the required learning, you can enrol onto the learning.

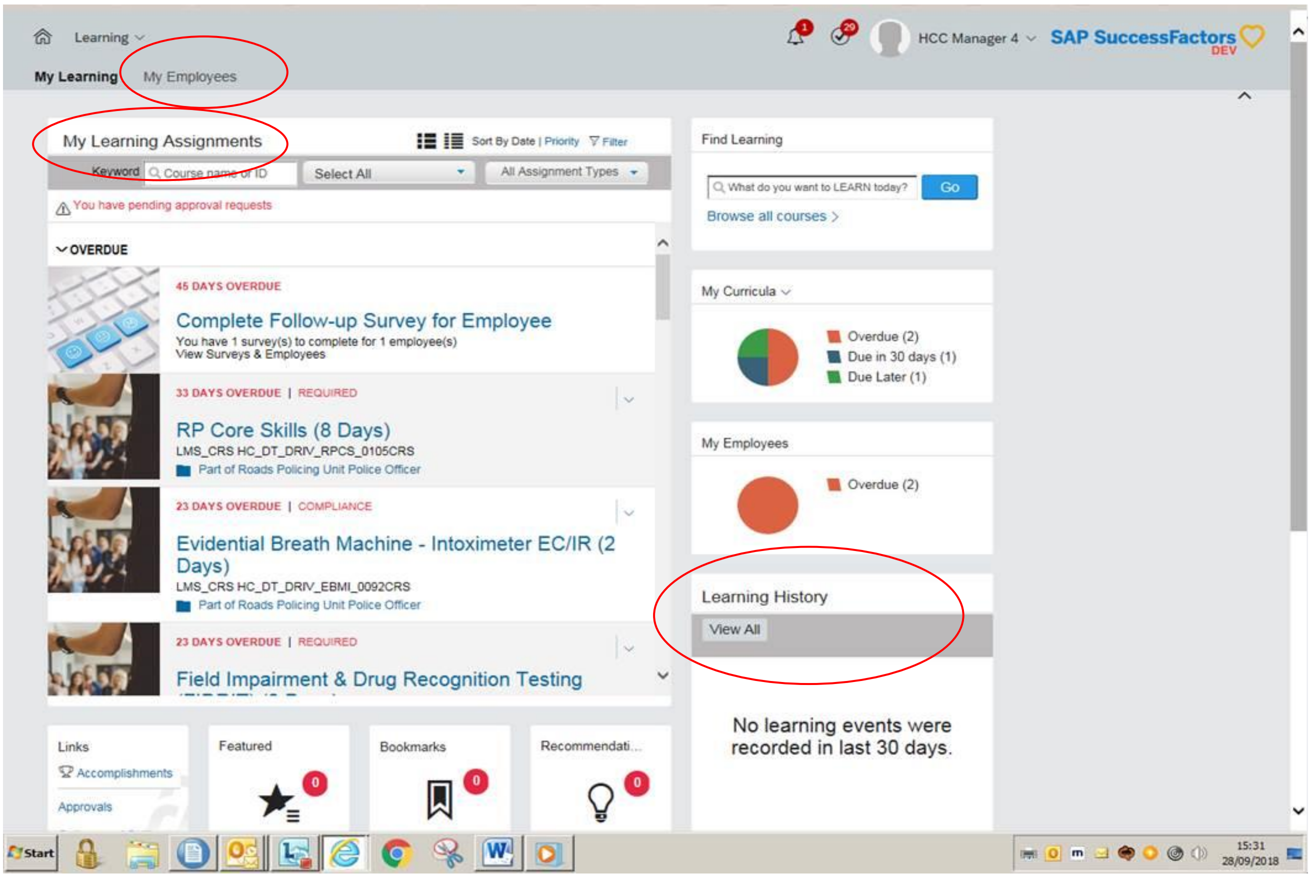
Finding details of courses you are booked on and for users you manage

Topic
View/access my learning history

Description
Helping track and manage learning, providing a view of completed courses and printing certificates

Process
Access Hantsweb and click on the **Learning Zone** tile.

Bookings and / or Required learning is displayed in **My Learning Assignments** on the landing page.



On the **My Learning** page, navigate to the **History** section at the right hand side of the page. The **History** tile provides you with a list of recently completed work. This will be blank if no learning events were recorded in the last 30 days.

Select a title to view the details of the completed course.

Alternatively, clicking the **View All** link takes you to your **Completed Work** page.

Completed Work lists courses by **Completion Date, Title** and **Status.**

Use the **Show Completions** drop-down to filter completed work by date. You can filter **After** a date**, Before** a date**,** or **Between** two dates**.**

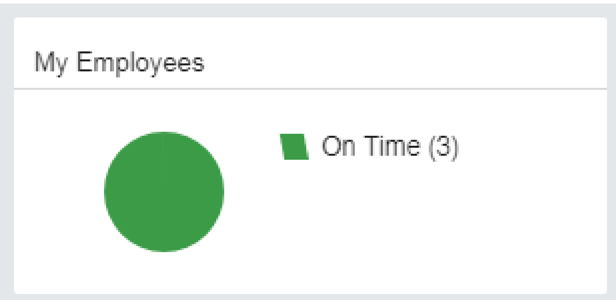
Use **Title** to search and filter course work by keywords in the title.

Select **Status** to filter completed work by the listed status e.g. **All, Course Attended, eLearning Complete** etc.

To review the details for the completed course, hover over the course title. Select **View Details** to view the complete registration information for the course including completed course hours. Select **Print Certificate** to print a certificate of completion for events.

Managers who wish to view the learning of employees reporting to them

Select **My Employees** by either clicking the 'My Employees' link on the right hand side, (shown below) or the 'coloured circle'. A list of employees reporting to you will be displayed on the left and you can select which employee to view by clicking their name.



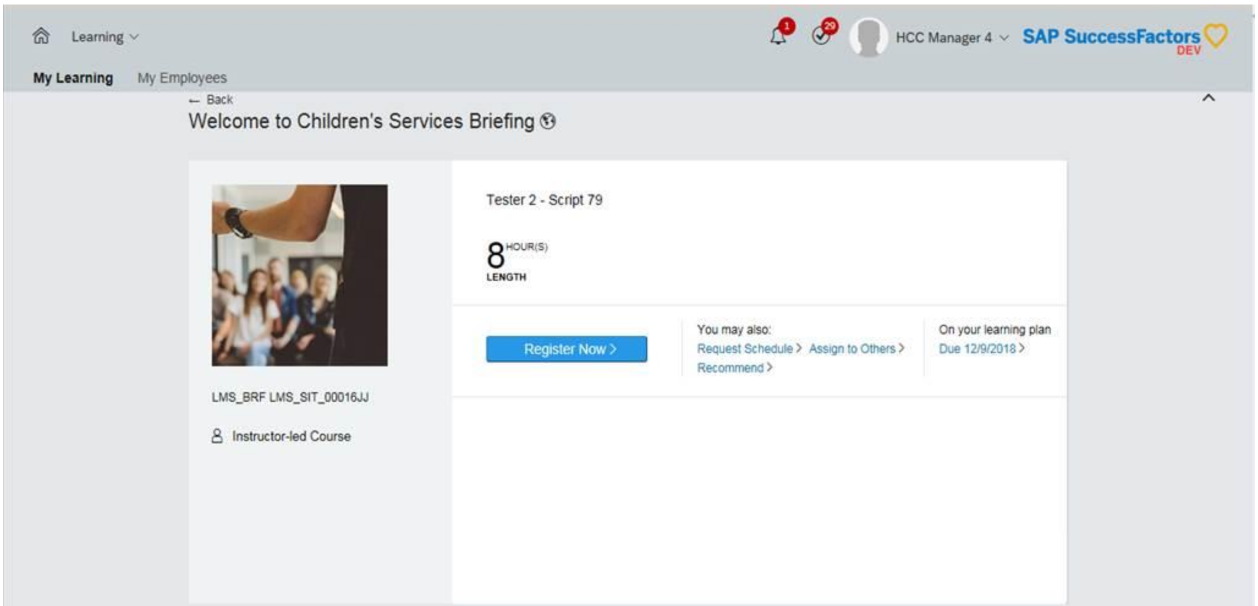
Booking yourself on a course

Topic
Register onto an instructor-led/virtual learning course

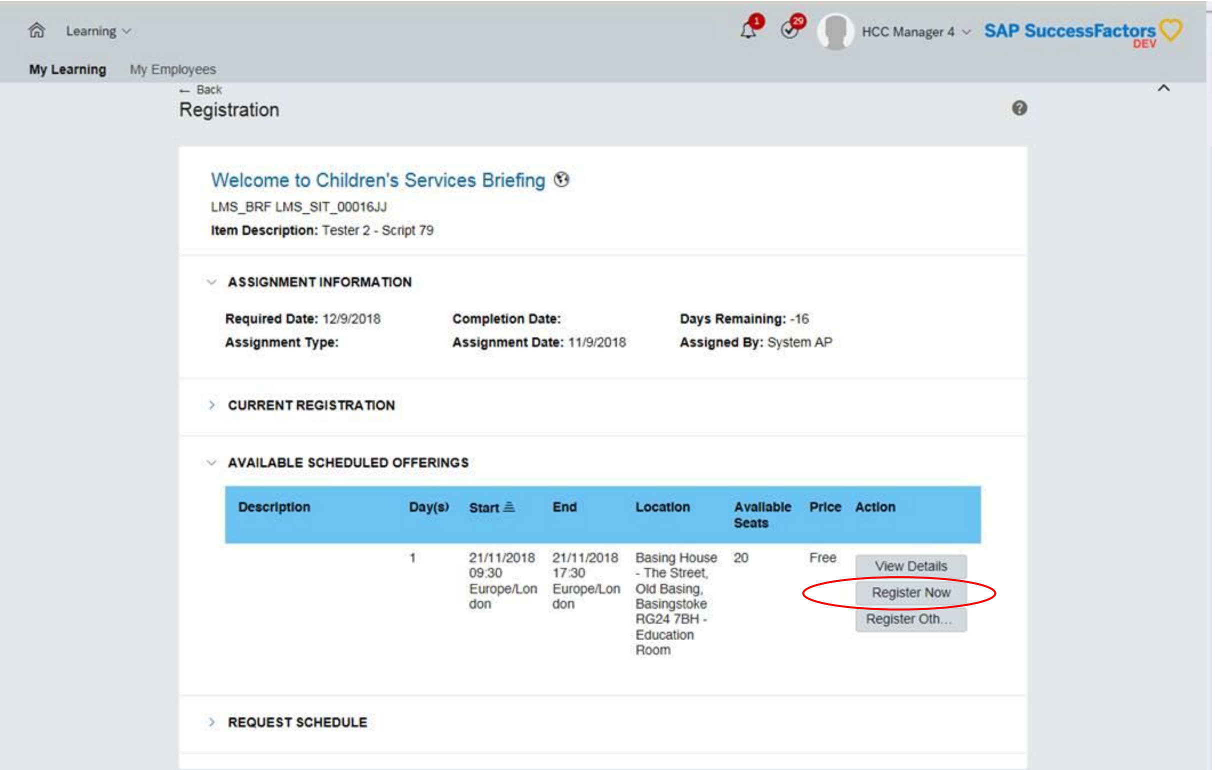
Description
Enrolling either by self-service or being enrolled by a manager who line manages them.

Process
After browsing the catalogue and finding a course you are interested in enrolling onto you can:

- Click on the course title or **More,** to view course details
- Click on **Assign to Me**, which puts the Learning Item in your learning plan, but doesn't actually book you onto the course
- Click on **See Offerings** to review scheduled offerings (dates) available, and if you want to book onto a specific scheduled offering, click on **Register Now** button



Check the information provided including any pricing, and add any information about accessibility or dietary needs, and then click **Confirm**. If a booking needs your Line Manager's approval then after you have clicked **Register Now** and **Confirm** buttons, you will see a message asking if you want to proceed. Click **Yes.**



Your place will not be confirmed until your Line Manager approves the request. The system will send you a pending notification of your request, and your manager a registration notification of your request which they will have to action.

After your manager has reached a decision, you will receive either a registration approval notification or a denial notification depending on the decision taken. If your request is approved, your **My Learning Assignments** section is updated.

Booking a course on behalf of another member of staff

Topic

Managers (including delegated managers) who wish to book learning for employees reporting to them

Description

Enrolling employees onto courses/Adding learning items in the catalogue to your team member's learning plan

Process

Access Hantsweb and click on **Learning Zone** tile.

If you are acting as a delegated manager, follow the instructions on page 5 and 6 of this workbook and ensure you have the delegate window open before attempting to complete any actions on behalf of the manager.

Click on the **My Employees** link on the right hand side, or on the 'coloured circle'.

Go to the **Find Learning** area on the right hand side of the **Learning** page, find a course by using the search box; if you start typing in a course name, the LMS will suggest titles based on this which you can click on to select. Then click **Go** to be taken to a results page with all relevant items.

Courses are displayed in tiles. Click **See offerings** to find the relevant event date. Click on **Register Others** located at the bottom left of each tile. Click on **Add** next to the **+** and a search box and staff list will appear. Select the staff by clicking the tick box to the left of their name. Click **Add,** then **Continue,** then **Register Employees.**

The system will automatically send registration notifications to you and the Learner.

Note: You can also use this to remove learning.

Approving a booking

Topic
Approve a request for a course

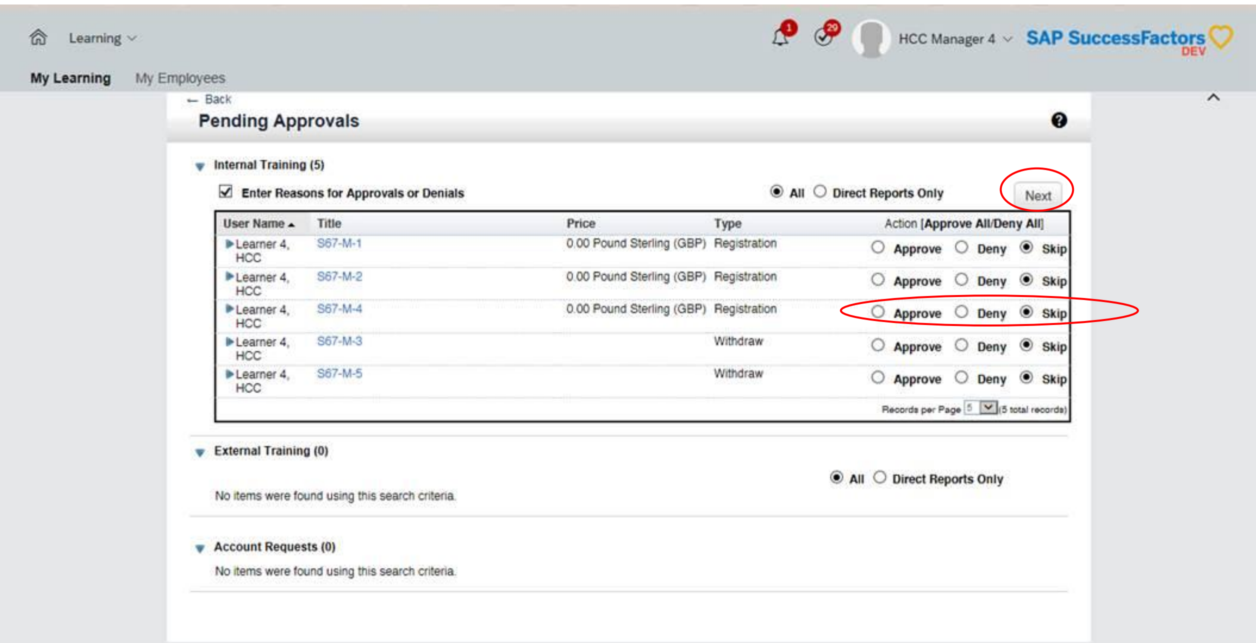
Description
Some training sessions require manager approval. Managers are notified of the approval requests. Requests are marked as pending until approved, Note: places continue to be offered to others until this step is complete

Process
Access Hantsweb and click on the **Learning Zone** tile.

Click on the **My Employees** link on the right hand side, or on the 'coloured circle'.

From there, navigate to the **Line Manager Links** link on the right hand side of the page.

Click **Approvals** to bring up a list of all pending employee training requests.



Make sure the **Enter Reasons for Approvals or Denials** box is checked so that you can add comments to explain your decision.

Click on the **course title** to review the course details to help you make your approval or denial decision. Once you have finished, click the **back** button to go back to the pending approvals list.

Once you have reached a decision, choose the appropriate button to:

- **Approve** the training request
- **Deny** the training request
- **Skip** approving or denying this request at this time (only works if you have more than 1 approval request to action)

Click **Next.**

Explain why you have approved or denied the training request in the text box provided. Click **Next** once complete**.**

Click **Confirm** to complete the approval workflow.

Click **Start Over** to return to the Pending Approval page.

Withdrawing/cancelling from a course

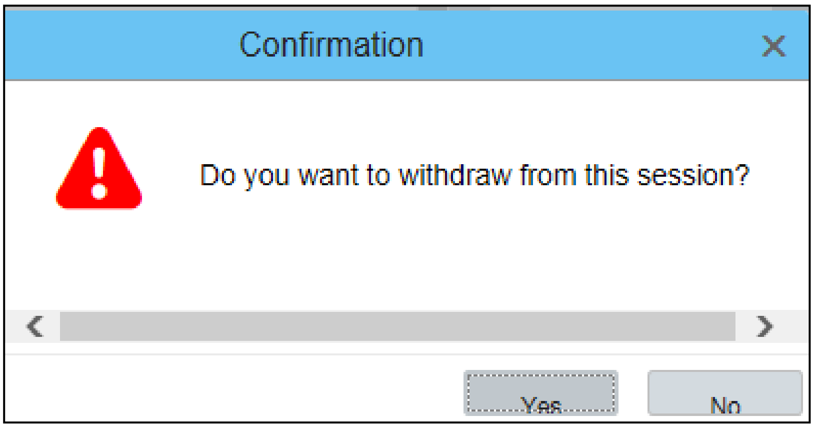
Topic
Cancel my enrolment on a scheduled offering

Description
Requesting withdrawal from a course

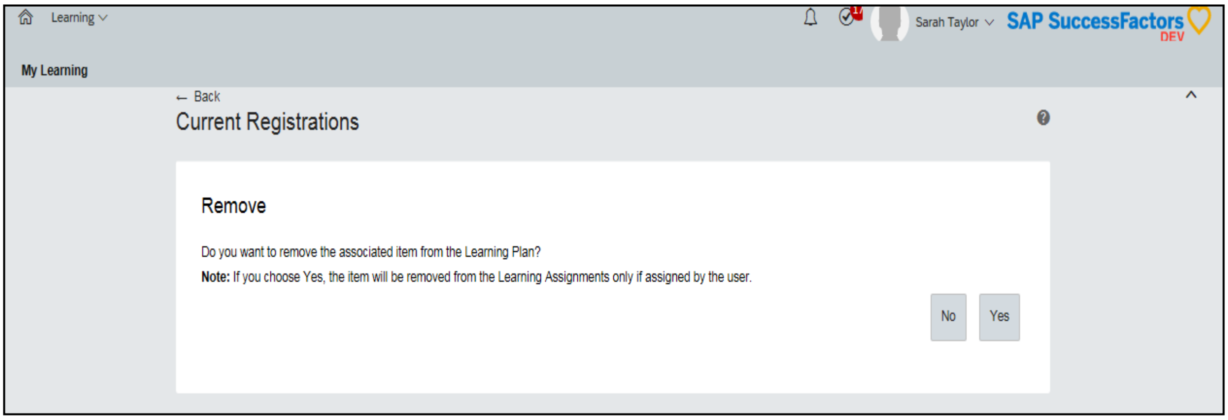
Process
Withdrawals before the cancellation period – no Manager approval
Access Hantsweb and click on the **Learning Zone** tile.

Navigate to the **My Learning Assignments** page. Find the relevant learning item title in your learning assignments. Click on the arrow next to the title to expand the **Options** menu. Click **Withdraw**.

A **Warning Message** will appear asking if you want to withdraw from the session**.** Click **Yes.**



A **Remove** window will open. Choose **Yes** or **No** depending on whether you want to update your learning plan.



Note: You may want to withdraw from a specific date but not remove the course from your learning plan if you still want to do the course in future. After withdrawal, the scheduled offering with a no enrolment status in the learning plan will act as a reminder for you to enrol onto future offerings.

Select a cancellation reason from the drop down list. Click **Submit.**

Note: You must select an option before proceeding with the withdrawal. If an option you require is not available, contact your learning team for assistance.

If the course is a charged course, you will be informed of how much will be refunded to your cost centre by withdrawing. Click **Yes.**

If Manager approval is not required to withdraw, the withdrawal is now complete and your **My Learning Assignments** section is updated. It will either display no enrolment status for the scheduled offering if item was not removed from the learning plan when the withdrawal took place, or the scheduled offering will no longer show as assigned if the item was removed during the withdrawal process.

Withdrawals before the cancellation period – Manager approval required

If Manager approval is in place for the scheduled offering, then after selecting the cancellation reason and clicking **Submit**, a message will appear indicating that the course requires approval for withdrawal. The page also displays the approver(s) who will be contacted to approve the request. Click **Submit**.

The system will send you a pending notification of your withdrawal request, and your Manager an approval notification of your withdrawal request which they will have to action. After your Manager has reached a decision, you will receive either a withdrawal approval notification or a denial notification depending on the decision made.

If your withdrawal request is approved, your **My Learning Assignments** section is updated. If your withdrawal request is denied, you will remain enrolled on the course.

Withdrawals within the cancellation period
Access Hantsweb and click on the **Learning Zone** tile.

Navigate to the **My Learning Assignments** page. Find the relevant learning item title in your learning assignments. Click on the arrow next to the title to expand the **Options** menu. Click **Withdraw**.

An error message will be shown to inform you that you cannot withdraw from the course as the withdrawal cut-off date has passed.

You will need to contact the HTLC Events Team to make an off system withdrawal request.

Accessing reports

We are currently working to streamline the reporting functionality for schools. Guidance will be added to this section very shortly.

Accessing 'How to' guides & other help

Topic
Contact us

Process

Access problems

If you are unable to access the **Learning Zone**, please contact the **HCC IT Help Desk** by calling **01962 847000**.

If you **are** able to access the **Learning Zone**, the following may be able to help you with your enquiry:

- **Help pages** – a full set of How to guides is available towards the bottom of the shared services web page, which is where the Learning Zone tile is situated - https://extra.hants.gov.uk/sharedservices
- **Information tile:** This tile is situated on the bottom left hand side of the **My Learning** page and will contain information about your learning co-ordinator and how to contact them. The tile also includes information regarding cancellation policies.
- **Email notifications:** Any emails you have received from the **Learning Zone** will have information to direct you to the **Information** tile on your **My Learning** homepage.
- **Course details:** By going to your **My Learning Assignments** section on your **My Learning** page, you can click on an item title, which will provide you with contact information for the course.

Talk to us

If you need to speak to one of your **learning co-ordinators,** you should use the contact details below:

Email: htlc.courses@hants.gov.uk

Telephone number: 01962 718600

FAQs

What info is required to log in?

You won't need to log into the LMS itself. Access is via ESS. To access this you will require your Personnel Number, Password and Memorable Word (you will need to register if you haven't previously)

If staff struggle to access ESS IT service desk will be able to help with this

What about people with two Personnel Numbers/ multiple employment?

Such people will have two learner records. This is because courses may e assigned by role and also an individual may have management responsibility in one role so they need to have separate records for each role.

Can we add our own training?

This is a possible future development.

Can we record learning that has taken place outside of the system?

Yes via a Recognition of Prior Learning process. HTLC booking team can add a record of training undertaken outside of the LMS.

Can a manager set a substitute?

Yes this is referred to as delegating. Guidance of how to do this, can be found, together with screen shots within the slide pack.

How will this work for Federation of schools?

The HT will need to ensure the substitutes are set that have oversight of each school within the federation.

Can the named Online Booker on CAS be transferred as a substitute in the LMS?

No. This has to be set up by the Manager.

If a manager books a course on behalf of a member of staff will they also receive the joining instructions?

Not by default, however it is possible to change settings in the system to make this happen. Concerns around this area have therefore been passed on to HTLC to consider.

Will notification emails be sent out at 3am?

Most notifications will be sent as soon as actions are taken but there is a possibility that emails will be generated overnight as large IT jobs tend to run over night to spread the load and prevent computer crashes.

What about courses done on paper or not through the Learning Zone?

Depending on the nature of the training a record of this learning may be able to be added by an administrator in HTLC.

Will evaluations stay on My Learning until completed?

In general, yes. Some evaluations learners will be able to remove if they are optional. Others must be completed before the learning history is updated to show the learning, e.g. HLTA courses.

Will staff who've changed school still be able to access records from the original school?

Yes, so long as they stay within a Hampshire maintained school. If they were set as the substitute manager – they should be removed by the Headteacher.

Can we still use un-named delegates?

No. The LMS requires a named learner for course enrolment. Training providers will be contacting schools to get names where un-named delegates have been used in existing bookings.

Will eLearning work? Sometimes it doesn't currently!

Yes – it is being embedded in the LMS and so it is easy to access and will track progress and completion. Some eLearning is being recreated as errors had been identified.

Can ESS have more than one email input? Some might prefer 2 email addresses – a personal one to access payslips etc. – and a work one for training etc.

Whilst a number of email addresses can be recorded on ESS lite, it is the email address recorded as the 'correspondence email' field that is used by HCC for both payslips and training notifications. These cannot be separated.

Our recommendation is for schools to ask all staff to ensure that their work email address is recorded as correspondence email address on ESS Lite.

Are budget reports available?

Yes this will be included in the standard reports.

Is there a Report showing learning completions?

The report "Learning History (CSV) (the detailed version on the options screen) shows which courses (including eLearning) the manager and employees have completed, including if they didn't attend. The Learning Plan (CSV)" shows which courses are on Learning Plans (ie have not been started or completed yet) – it also shows the number of days until (or since) it expires.

Can management responsibilities be split i.e. approval and booking?

The head teacher can delegate management responsibilities to a number of other staff. All these individuals then have the same management rights with the ability to approve requests and make bookings. Who performs what tasks then needs to be decided as an off-system process.

Will there be step by step instructions for all staff?

Help guides will be available from the shared services page (see Learning Zone Guidance tile)

Who would approve training for the head as they would have no line manager?

No-one via the approvals process in the LMS. The approval process relies on the line manager field being populated in the Employee Profile. HTs do not have a line manager in SAP therefore no approval will be sent. When a HT registers themselves onto a course, they are enrolled straight away.

This is not the same for manager substitutes as they have the HT as their line manager on SAP. In this case, the manager substitute could authorise their own registration, so there needs to be a local process for authorising these registrations.

Will heads still get all the notification emails even after they have delegated?

Yes the head and anyone who they delegate to be a manager will be getting all notifications. We recommend that rules are set up in email inboxes to deal with notifications as required. Guidance on this is also attached.

Is there a report for who has and hasn't completed particular learning such as PREVENT e-learning or Fire Safety?

Yes there is a standard report which will allows you to do this.

Glossary of terms

Learning Item

An individual piece of learning with set learning objectives.

Scheduled Offering

An instance of a Learning Item that happens on a specific date (or dates), in a location.

Catalogue

A catalogue is where users view/search the learning that is available to the.

Curricula

A collection of learning items grouped together

Program

A collection of learning designed to be both flexible and structured (learning items or external items).