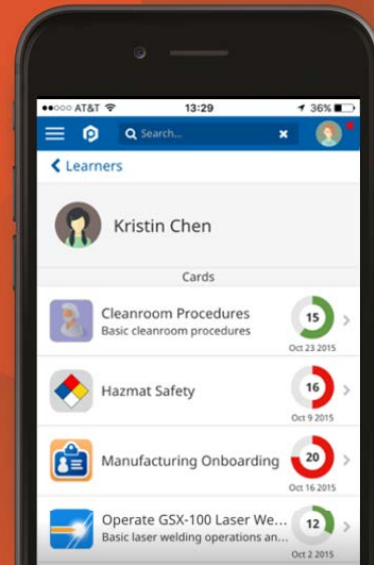# Managers Guide

Pract.us Basics for Managers

This guide helps Managers get the most from the Pract.us app. For more detailed help with other Pract.us roles, see these additional guides:

|		
Getting Started	Mentors Guide	Learners Guide
Skill Authors Guide	Card Authors Guide	Team Admins Guide

Topics in this Guide

- [Managing new enrollments](#)
- [Managing card extensions](#)
- [Managing card cancellations](#)
- [Monitoring progress](#)
- [Getting help](#)

## Managing New Card Enrollments

Before continuing, it may be helpful to review the card enrollment process from the Learner's perspective. See "Enrolling in a New Card" in the Learners Guide for complete details.

1. From anywhere in the Pract.us app, open the slide-out side menu by selecting the ☰ button as shown in the **orange** rectangle below.
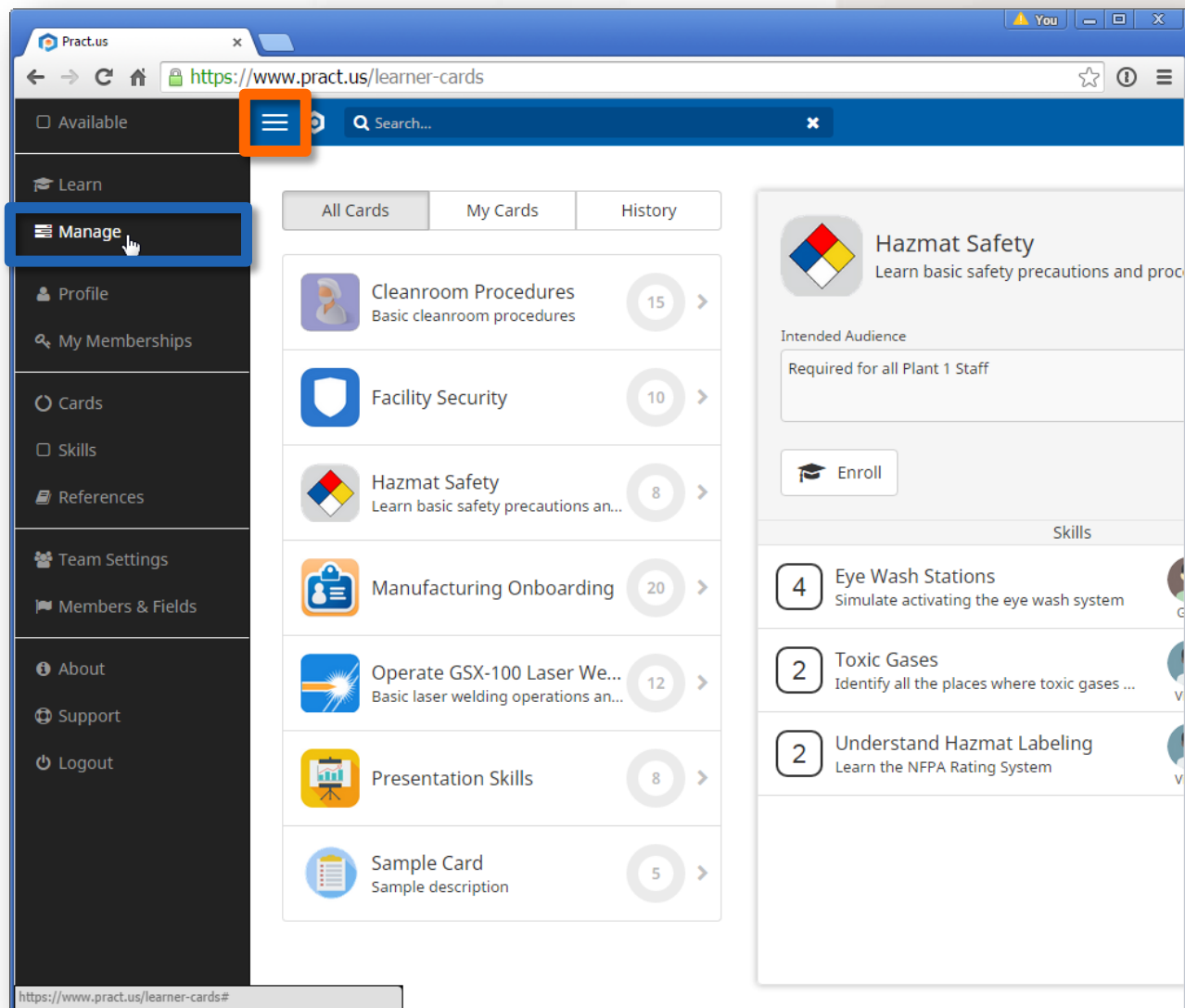
*The Card Catalog with black slide-out side menu visible on the left*

2. Select ![Manage] as shown in the **blue** rectangle above. If you don't have the Manager role and don't manage at least one Learner, you won't see this menu option. After selecting ![Manage] you should see a page like the following:
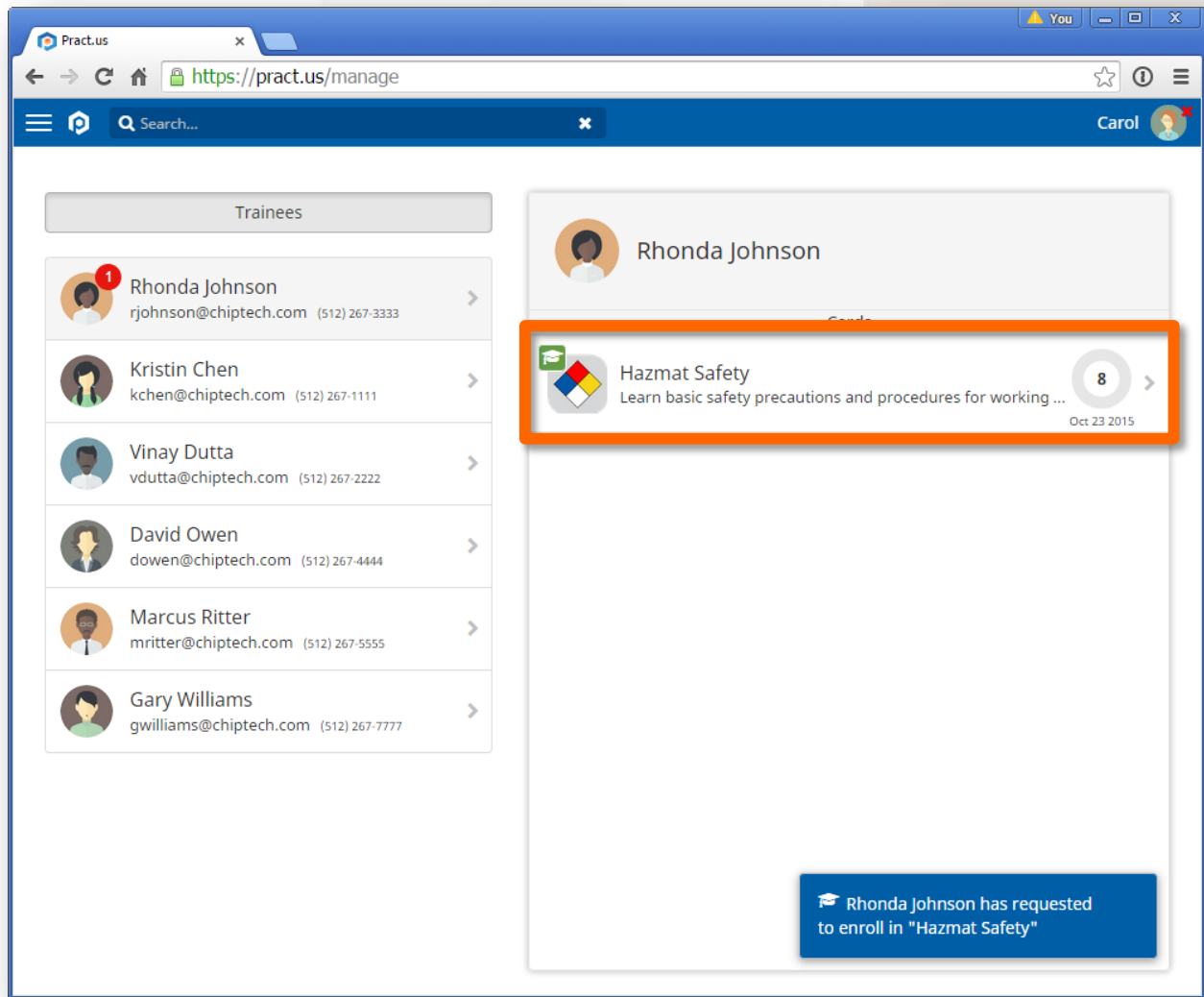
The Manage view, with an in-app popup notification at lower right

3. All Team members you manage will be listed on the left. The right side will display a list of enrollment actions that have been requested of you, if any, and all currently enrolled cards.

4. Red circular badges, such as the one shown above for Rhonda, are one of Pract.us' ways of alerting you. In the case above, the badge refers to Rhonda's new card enrollment request.

5. When you select the enrollment item by clicking or touching it (anywhere inside the **orange** rectangle above), you'll see details of the request, including:

    a. The full card details, including the its name and a list of all its skills.

    b. The Learner's comments submitted with the enrollment request, if any.

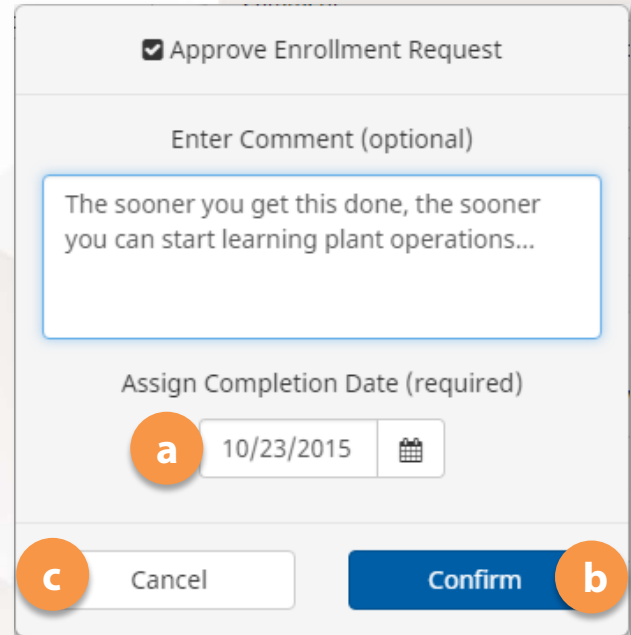   c. The Learner's requested card completion date.

d. **Approve** and **Reject** buttons. You'll use these to approve or reject the enrollment request.
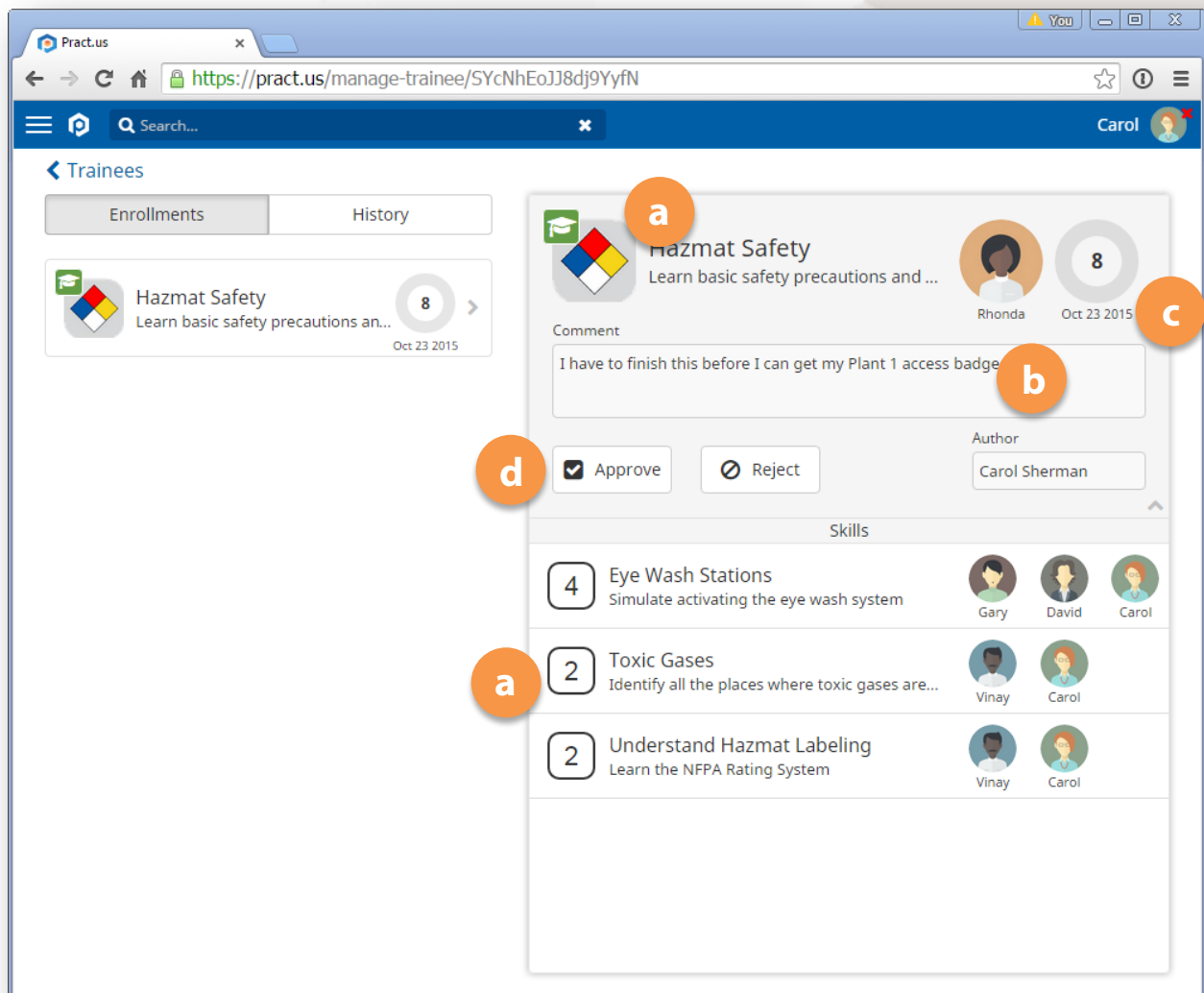
Enrollment Details

6. Also note the **green** mortarboard hat icon 🎓 decorating the card badge on both left and right sides. This symbol indicates an enrollment request has been made for this card. As soon as you take action (Approve or Reject) the icon will disappear here and in the Learner's Pract.us app too.

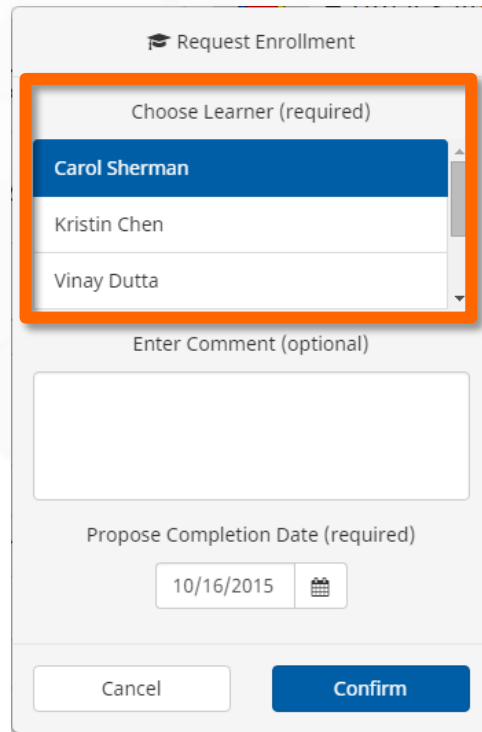7. Choose to **Approve** or **Reject** the enrollment request.

8. If you **Approve**, you'll see the following popup window:

9. Enter a comment if you want to. Comments are optional.

   a. Accept or modify the Learner's proposed Completion Date. The Learner's proposed date will be entered by default, but if you want to change it, just select the calendar icon 📅 and choose a new date. Your date can be earlier or later than the Learner's proposed date.

   b. Select **Confirm** to complete the approval.

   c. If you select **Cancel**, the popup will disappear and you'll cancel the approval action and return to the enrollment detail window.

10. If you **Reject**, you'll only have the option to enter a comment. Although it's probably a good idea to provide the Learner with an explanation for your rejection, comments are optional. **Confirm** to complete the rejection or **Cancel** to close the popup and return to the enrollment details window.

As a Manager, you can also enroll any of your Learners directly. To do this:

1. Go to the Learn view and find the card you want to enroll a Learner in. You may need to switch Fields to see the right set of cards.

2. Select the **Enroll** button from the card banner

3. Because you're a Manager, the enrollment popup window that appears will look a little different from the standard popup everyone else sees:

Request Enrollment Popup Window

4. You'll see a **Choose Learner** list near the top (**orange** rectangle above). You're a Manager, but you're also a Learner (everyone is!), so you can always enroll yourself just like any other Learner. Your name will be first on the list to make that faster. But if your goal is to enroll one of your Learners, then select her name from the list. Note, the Learner needs to be a member of the card's Field. If she isn't, ask your Team Admin to make her a member of the Field.

5. Select a **Completion Date.**

6. Enter a **Comment** if you want (it's optional).

7. Select **Confirm** to complete the enrollment.

Approving Card Extensions

Sometimes Learners need more time to complete their cards. They can ask you for more time when they need it, and you can also unilaterally give them more time without their requesting it. In the first case, Learners will send you an extension request. Card extension requests have a **blue** calendar icon

1. **Approve**: To see the Learner's new proposed completion date, select **Approve**. You can:

    a. accept the proposed new completion date, enter an optional comment, then **Confirm**, or
    b. modify the date as you see fit, enter an optional comment, then **Confirm**, or
    c. **Cancel** your approval and return to the extension detail window.

2. **Reject**: You can reject outright the extension request. Enter an optional comment, then **Confirm**.

3. **Cancel**: You can also cancel the Learner's card altogether. This option is most useful when a Learner requests an extension, but you decide the card is no longer relevant, so it's best simply to cancel it.

To extend a card *without* the Learner requesting it, go to **Manage** view, select the Learner from the left side and the card from the right side to display the Enrollment Details as shown above. Choose **Extend** and enter a new completion date and optional comment, then select **Confirm**. The Learner's progress dial will be updated immediately and she will also be notified according to her Notification choices in her Profile.

Approving Card Cancellations

As a Manager, you can also cancel your Learners' card enrollments at any time. Circumstances change: employees leave or change jobs, or you may change their goals and objectives. In any case, card cancellation is easy, whether requested by Learners or performed unilaterally by you. In the first case, Learners will send you a cancellation request. You'll recognize cancellation requests by the **red** trashcan icon 🗑

4. **Approve**: Enter an optional comment, then **Confirm**. You can also Cancel your approval and return to the extension detail window.

5. **Reject**: You can reject outright the cancellation request. Enter an optional comment, then **Confirm**. You can also Cancel your approval and return to the extension detail window.

6. **Extend**: You can also extend the Learner's card instead of cancelling it. This option is most useful when a Learner has requested a cancellation, but you want him to stick with it and provide more time to finish. **Confirm** or **Cancel** to finish.

To cancel a card *without* the Learner requesting it, go to **Manage** view, select the Learner from the left side and the card from the right side to display the Enrollment Details as shown above. Choose **Cancel** and enter an optional comment, then select **Confirm**. The Learner will be notified according to his Notification choices in his Profile.

Monitoring Learner Progress - Events, Concerns and Notifications

Unlike traditional methods of managing on-the-job training, Pract.us makes it very easy to monitor Learner status and progress in real-time.

Concerns

Pract.us is event-driven - virtually everything a user does triggers some form of event. Events, in turn, can create "Concerns". We saw an example of a Concern earlier - the **red**, numbered, circular badge icon in the **Manage** view informs you that there's something you need to be aware of.

In the previous case, the red Concern badge was drawing your attention to the enrollment request awaiting your action.
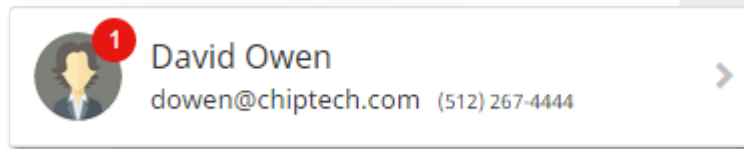
David has one Concern

Another type of Concern is the "Slow Pace" alert. This Concern triggers whenever one of your Learner's cards falls behind the average sign-off pace (measured in points per day) needed to complete the card by the assigned date.

The Slow Pace concern is a somewhat rough gauge of a Learner's progress, because a Learner's activity in Pract.us may vary from day to day or week to week. Pract.us uses a points per day average when determining pace, so a Learner's Progress Dial fill color (**red** or **green**) may not always be a perfect indicator of the Learner's status. But if you see a Learner with a Slow Pace concern that persists, you may want to investigate.

Notifications

Events can also trigger Notifications, which can be delivered via in-app popup alert, email, or even SMS/text. There are several notifications designed especially for Managers, including:

1. when a Learner makes any kind of enrollment request. We saw an example of this in the **Manage** View above.

2. when a Learner receives any skill sign-off. Use this one with caution because it can generate a lot of notifications!

3. when a Learner finishes a card by receiving the final skill sign-off.

4. when a Learner's card falls behind pace (the Slow Pace concern).

5. when a Learner's card returns to a normal pace (the Slow Pace concern clears).

You can enable any of these Notifications, and choose their delivery method, in **Profile > Notifications**.

Reports

Pract.us will aggregate your Learners' card progress and status and email you reports at intervals of your choosing. Select "Manager's Status Report" from **Profile > My Reports** to choose the report interval that works for you.

Sample Manager's Status Report

Some email applications have trouble displaying the graphical Progress Dial included in this report. If your email client does not display the Progress Dial, go to **Profile > Preferences** and turn off "Prepare email reports with advanced HTML". This will insert a **red** or **green** (depending on the pace) percentage number in place of the Progress Dial graphic.

Getting Help

- For more help using Pract.us, see our Support Site: support.pract.us.

- You can also email us at support@pract.us