# West Sussex Learning and Development Gateway
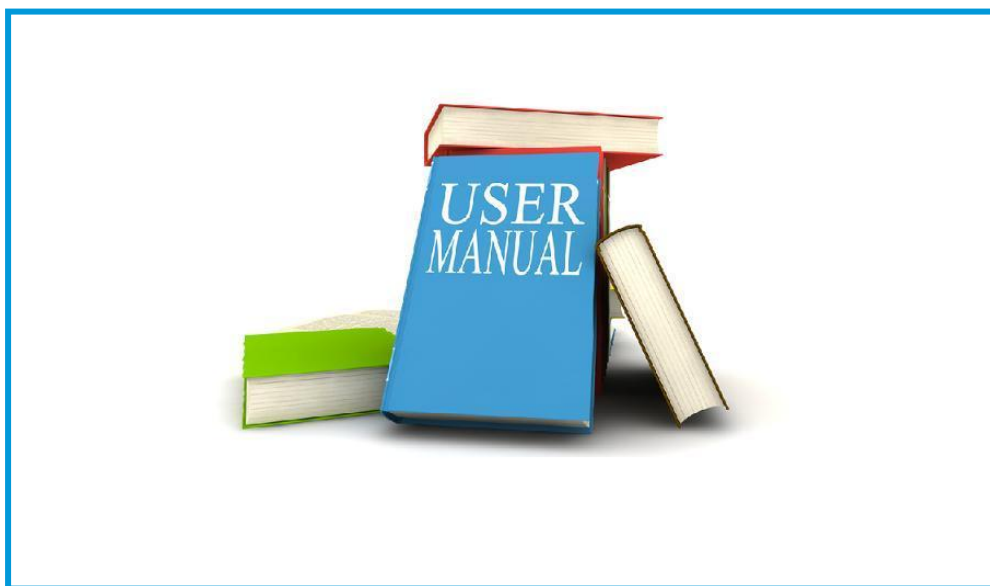


## Manager's guide

# CONTENTS

# THE WEST SUSSEX LEARNING AND DEVELOPMENT GATEWAY

**INFOCUS**

The West Sussex Learning and Development Gateway has been designed as a one stop shop for you to manage all your teams training needs.

Through the Gateway you can easily and quickly keep track of all the training that your team is going on/has been on. You can authorise events that they have booked and you can even book your team on events yourself.

This booklet assumes that you have read the "West Sussex Learning and Development Gateway general user guide" and that you are familiar with using the Gateway in general.

### In this booklet we will show you how to:

- ✓ authorise event bookings
- ✓ view upcoming events for staff
- ✓ view events attended by staff
- ✓ view other events attended by staff
- ✓ make a booking on behalf of a staff member
- ✓ view events you have booked for staff
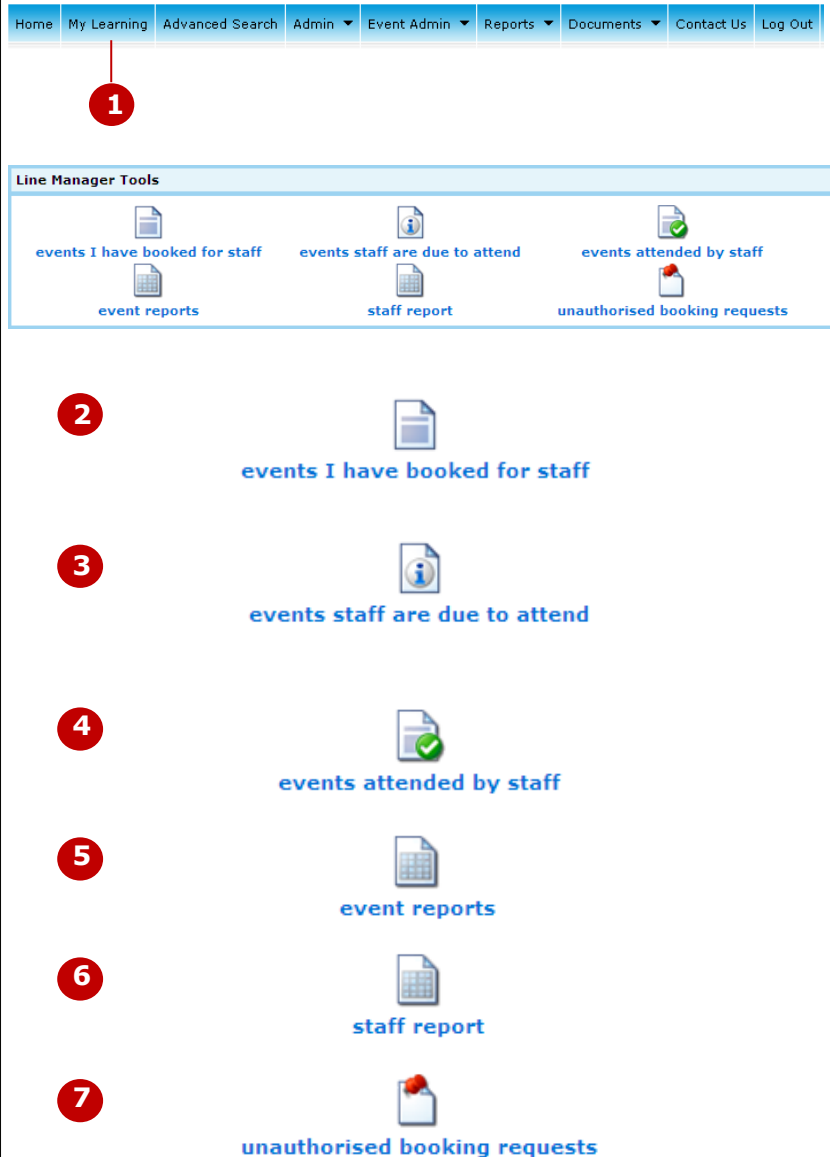- ✓ produce reports

# LINE MANAGER TOOLS

All the tools you need to track your teams learning are in one easy to access place within your 'My Learning' area.

## Try This Yourself:

*Before trying this ensure that you have logged into the Gateway*

**1** To access the **Line Manager Tools** click **My Learning** on the shortcut bar

*You can now see the 6 tools you have available to you:*

**2** To see what events you have booked your staff members on, click **events I have booked for staff**

**3** To find out what events your staff members are booked on click **events staff are due to attend**

**4** To discover what events your staff members have been on click **events attended by staff**

**5** To see a list of all your staff members upcoming training click **event reports**

**6** To find a particular staff members training click **staff report**

**7** Finally to see what training your staff members have requested click **unauthorized booking requests**

| Home | My Learning | Advanced Search | Admin ▼ | Event Admin ▼ | Reports ▼ | Documents ▼ | Contact Us | Log Out |

**Line Manager Tools**

events I have booked for staff   events staff are due to attend   events attended by staff

event reports   staff report   unauthorised booking requests

events I have booked for staff

events staff are due to attend

events attended by staff

event reports

staff report

unauthorised booking requests

---

## For Your Reference…

1. Although you will receive email alerts it's worth checking into this area regularly

## Handy to Know…

- You can access these tools on any computer with access to the internet, including your smartphone

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# AUTHORISE AN EVENT BOOKING

When a staff member books on an event they will be notified that they will not be allocated a place without their Line Manager's authorisation.

You can easily authorise event bookings via the option in the Line Manager tools.

## Try This Yourself:

*Before trying this ensure that you have logged into the Gateway*

> *To access the **Line Manager Tools** click **My Learning** on the shortcut bar*
>
> *When a booking request is made the **Unauthorized booking requests** text will be red*

**1** Click **Unauthorized booking requests**

**2** A list of booking requests appears detailing when the bookings were requested and for what events

**3** Click the checkbox next to the staff member's name

**4** Click **Next**

**5** Click **OK**

The event booking will now be authorised
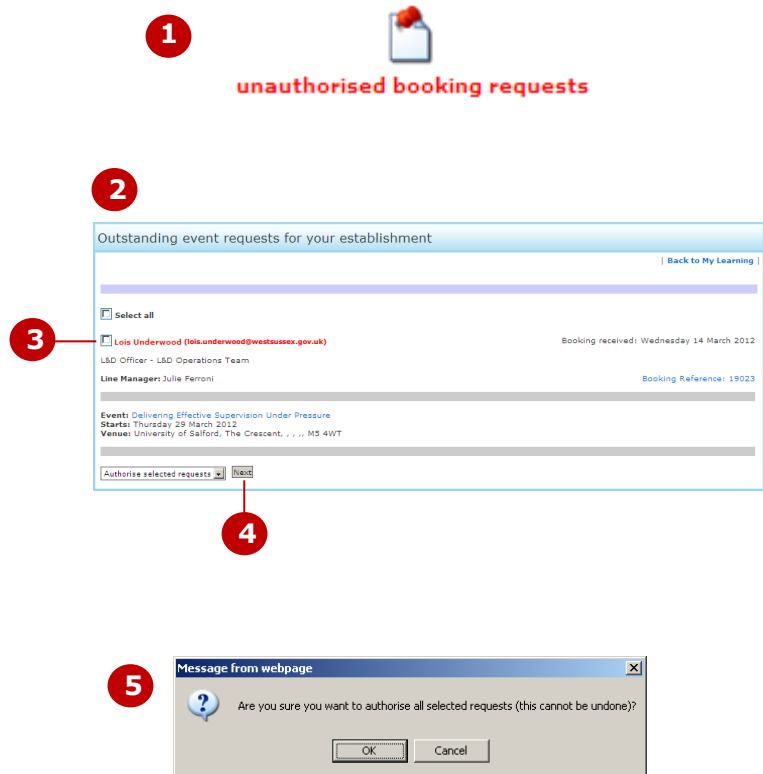


## For Your Reference…

1. You can also **deny** or **delete** unauthorized bookings by clicking the relevant option from the authorise list

## Handy to Know…

- When a booking is requested you will receive an email with links to **Approve** or **Decline** the request (they will take you to the Gateway)
- **Please note:** If you do not authorise the booking your staff member will not be able to attend the event

# BOOKING A STAFF MEMBER ON AN EVENT

Although your staff members can use the Gateway to book themselves on to an event there may be times when you want to book them on yourself.

Using the Gateway to do this is as easy as booking yourself on an event.

## Try This Yourself:

*Before trying this ensure that you have logged into the Gateway*

**1** Find the event that you want to book staff members on to.

**2** Click on **Request a place**

**3** Click either of the links that say **Request a place on behalf of a staff member**

**4** Choose the **Staff member's department** from the selection list

**5** Choose the **Staff member** from the selection list

**6** The staff member's name will now appear on the event

**7** Complete the **Booking Requirements** (if applicable)

**8** Decide who you want to receive the emails about the event

**9** Read and agree the **Terms and conditions**

**10** Click **Submit**

**11** A confirmation message will now appear

---

## For Your Reference…

1. If your member of staff doesn't have a Gateway account you can still add them by clicking **Click here to add a staff member**. Filling in the details will create a Gateway account for them

## Handy to Know…

- You can add more than one staff member to an event by clicking **Add another participant to this event**
- You can have emails regarding the event sent to both yourself and the staff member

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# VIEWING EVENTS STAFF ARE DUE TO ATTEND

Using the Gateway makes it quick and easy to see at a glance what events your staff members are booked on. You can also view the details of the events so that you can make sure your staff are booked on the correct ones.

---

**Try This Yourself:**

*Before trying this ensure that you have logged into the Gateway*

> *To access the **Line Manager Tools** click **My Learning** on the shortcut bar*

**1** Click **events staff are due to attend**

> *A list of events with staff members names will now appear*

**2** You can view the details of the event by clicking on **Show details**

**①**



events staff are due to attend

| Events your staff are due to attend | |
|---|---|
| 4 bookings found | \| **Back to My Learning** \| |

◄ **1** ►

**②**

**Event: Manager's Forum (CTC)** — | Show details |
**Date and time:** Thursday 20 October 2011 10:00 - 12:00 — **Code:** AD 11/314
**Venue:** Worthing Rugby Club, The Rugby Park, BN16 4AX | Map |
John Gisby - L&D Operations Team — Booking status: Confirmed

**Event: Diabetes Awareness: a workshop for carers (CTC)** — | Show details |
**Date and time:** Friday 16 March 2012 — **Code:** AD 11/402
**Venue:** Salvation Army, The Hub, PO21 1QL | Map |
Kevin Flores - L&D Operations Team — Booking status: Unconfirmed

**Event: Delivering Effective Supervision Under Pressure** — | Show details |
**Date and time:** Thursday 29 March 2012 09:30 - 16:00 — **Code:** AD 12/263
**Venue:** University of Salford, The Crescent, M5 4WT | Map |
John Gisby - L&D Operations Team — Booking status: Unconfirmed
Jamie Martin - L&D Operations Team — Booking status: Unconfirmed

---

**For Your Reference…**

1. If you have a lot of staff members due to attend events there may be several pages to view

**Handy to Know…**

- Staff member's names in **red** indicate bookings that have been unconfirmed. If you have any concerns about unconfirmed bookings please contact Learning and Development admin on 01243 756834

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# VIEWING EVENTS YOU HAVE BOOKED FOR STAFF

If you have booked staff members on courses yourself, you may want to see who you have booked on what.

Again, the Gateway makes this a quick and easy process.

**Try This Yourself:**

*Before trying this ensure that you have logged into the Gateway*

> *To access the **Line Manager Tools** click **My Learning** on the shortcut bar*

**1** Click **events I have booked for staff**

> *A list of events with staff members names will now appear*

**2** You can view the details of the event by clicking on **Show details**

**3** You can download any documents for the event by clicking on **Download documents**

**①** events I have booked for staff

Events I have booked on behalf of staff

This list shows all events that are due to run that you have booked on behalf of staff | Back to My Learning |
3 events found

◄ 1 ►

**Participant: Kevin Flores**
Diabetes Awareness: a workshop for carers (CTC)     Code: AD 11/402
Date and time: Friday 16 March 2012
Salvation Army, The Hub, PO21 1QL    | Map |
| Show details | Download documents | Substitute | Cancel booking |

**Participant: John Gisby**
Delivering Effective Supervision Under Pressure     Code: AD 12/263
Date and time: Thursday 29 March 2012 09:30 - 16:00
University of Salford, The Crescent, M5 4WT    | Map |
| Show details | Download documents | Substitute | Cancel booking |

**Participant: Jamie Martin**
Delivering Effective Supervision Under Pressure     Code: AD 12/263
Date and time: Thursday 29 March 2012 09:30 - 16:00
University of Salford, The Crescent, M5 4WT    | Map |
| Show details | Download documents | Substitute | Cancel booking |

**②** **③**

---

**For Your Reference…**

1. If you have a booked a lot of staff members on events there may be several pages to view

**Handy to Know…**

- The events list appears in date order

---

# SUBSTITUTING STAFF MEMBERS ON EVENTS

Occasionally you may need to change the staff member you have added to an event. Once more the Gateway makes this a simple and easy process.

## Try This Yourself:

*Before trying this ensure that you have logged into the Gateway*

*To access the **Line Manager Tools** click **My Learning** on the shortcut bar*

**1** Click **events I have booked for staff**

*A list of events with staff members names will now appear*

**2** Click **Substitute** under the event for the staff member you wish to change

**3** In the pop up window that appears click the drop down arrow on the **Participant name** list

*Choose a staff member*

**6** Click the **Save** button

**7** The staff member has now been changed

**1**

**events I have booked for staff**

Events I have booked on behalf of staff

▶ This list shows all events that are due to run that you have booked on behalf of staff | Back to My Learning |
3 events found

◀ 1 ▶

Participant: Kevin Flores
Diabetes Awareness: a workshop for carers (CTC) | Code: AD 11/402
Date and time: Friday 16 March 2012
Salvation Army, The Hub, PO21 1QL | Map |
| Show details | Download documents | Substitute | Cancel booking |

Participant: John Gisby
Delivering Effective Supervision Under Pressure | Code: AD 12/263
Date and time: Thursday 29 March 2012 09:30 - 16:00
University of Salford, The Crescent, M5 4WT | Map |
| Show details | Download documents | Substitute | Cancel booking |

Participant: Jamie Martin
Delivering Effective Supervision Under Pressure | Code: AD 12/263
Date and time: Thursday 29 March 2012 09:30 - 16:00
University of Salford, The Crescent, M5 4WT | Map |
| Show details | Download documents | Substitute | Cancel booking |

**2**

## Substitute Bookings

| Course Title | Delivering Effective Supervision Under Pressure (AD 12/263) |
| Venue | University of Salford |
| Start date and time | Thursday 29 March 2012 09:30 - 16:00 |

▶ Select a new participant from the list below
Establishment: L&D Operations Team
Participant name: Select a participant **3**
▶ Save ▶ Close
**4**

Select a participant
Blake, Andy
Ferroni, Julie
Flores, Kevin
Little, Babs
Stringer, Nicci

## For Your Reference…

1. The new staff member will receive an email informing them that they have been substituted for a place

## Handy to Know…

• It is much better to substitute a person rather than not having someone turn up to an event. There may be costs involved in non-attendance

# CANCELLING A BOOKING FOR A STAFF MEMBER

If you have booked staff members on courses yourself, you may need to cancel that booking. In the first instance it is better to substitute the staff member with another. If this is not possible then you can cancel the booking.

## Try This Yourself:

*Before trying this ensure that you have logged into the Gateway*

> *To access the **Line Manager Tools** click **My Learning** on the shortcut bar*

**1** Click **events I have booked for staff**

> *A list of events with staff members names will now appear*

**2** Click **Cancel booking** under the event for the staff member you wish to cancel the booking for

**3** Complete the **Cancel Request** form that appears, with your details

**4** Click **Send**


events I have booked for staff

**Events I have booked on behalf of staff**

> This list shows all events that are due to run that you have booked on behalf of staff | Back to My Learning |
> 3 events found

◀ **1** ▶

**Participant: Kevin Flores**
Diabetes Awareness: a workshop for carers (CTC) | Code: AD 11/402
**Date and time:** Friday 16 March 2012
Salvation Army, The Hub, PO21 1QL | Map |
| Show details | Download documents | Substitute | Cancel booking |

**Participant: John Gisby**
Delivering Effective Supervision Under Pressure | Code: AD 12/263
**Date and time:** Thursday 29 March 2012 09:30 - 16:00
University of Salford, The Crescent, M5 4WT | Map |
| Show details | Download documents | Substitute | Cancel booking |

**Participant: Jamie Martin**
Delivering Effective Supervision Under Pressure | Code: AD 12/263
**Date and time:** Thursday 29 March 2012 09:30 - 16:00
University of Salford, The Crescent, M5 4WT | Map |
| Show details | Download documents | Substitute | Cancel booking |

**Cancel Request**

| | |
|---|---|
| **Your name** | Jamie Martin * |
| **Your Establishment** | L&D Operations Team * |
| **Your e-mail Address** | jamie.martin@westsussex.gov.uk |
| **Your Telephone** | |
| **Event Title** | Delivering Effective Supervision Under Pressure * |
| **Event Start Date** | 29 March 2012 * |
| **Reason for Cancellation** | * |

You have **150** characters remaining for cancellation reason.

**Enter the code exactly as you see it in the image (Cookies must be enabled)**

creatures,

Type the two words:

☐ I have read and agree to the cancellation policy | Cancellation Policy |

Send Cancel

## For Your Reference…

1. The event will still appear in the **events I have booked for staff** list until the cancellation has been confirmed

## Handy to Know…

- You will receive an email headed **Cancellation request (Line Manager copy)**

# VIEWING EVENTS ATTENDED BY STAFF

Using the Gateway makes it quick and easy to see at a glance what events your staff members have attended.

**Try This Yourself:**

*Before trying this ensure that you have logged into the Gateway*

> *To access the **Line Manager Tools** click **My Learning** on the shortcut bar*

**1** Click **events attended by staff**

> *A list of events with staff members names will now appear*

**2** You can view the details of the event by clicking on **Show details**



**For Your Reference…**

1. If lots of events have been attended by staff there may be several pages to view

**Handy to Know…**

- The events list appears in date order

# LINE MANAGER REPORTS – EVENT REPORTS

There are two types of reports that you, as a Manager, can run on the Gateway. The first is an **event report**.
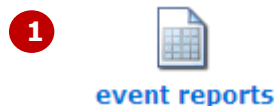
With this report you can list all your staff members, what event they have registered for and what their status is. The report can be printed or saved as an Excel worksheet.

**①** event reports

## Try This Yourself:

*Before trying this ensure that you have logged into the Gateway*

> *To access the **Line Manager Tools** click **My Learning** on the shortcut bar*

**1** Click on **event reports**

> *The **Event Attendance History** reporting option will now appear*

**2** Click the drop down arrows to select a **Date range**

**3** Choose **Event subject/s** (to multi select keep **Ctrl** pressed as you click)

**4** Choose **Target audience/s** (to multi select keep **Ctrl** pressed as you click)

**5** Click the drop down arrow to choose which order you want your report in

**6** Click **Submit**

**7** The report will now appear at the bottom of the screen (you will need to scroll to see it)

**8** To print the report click **Printer friendly**

**9** To save the report as an Excel file click **Download to Excel**

### Line Manager Reports

| | | Back to My Learning |
|---|---|---|
| Report | Event Attendance History | |
| LA | West Sussex County Council | |
| Establishment | L&D Operations Team | |
| Date range | Anytime ▾ to Anytime ▾ | **②** |

Event subjects:
Assessment
Care Management
Child Protection and Safeguarding
Children and Young People
Coaching and mentoring
Common Assessment Framework
Communication and Writing Skills
Customer Service
Day Services
Dementia
(Hold down Ctrl to select more than one subject) **③**

Target Audience:
Adult Services
All WSCC Staff
Approved Mental Health Professionals (AMHP)
Care Homes
Care Training Consortium members
Children and Young People in Care
Children Services
Communities and Infrastructure
Corporate functions
Customers and Change
(Hold down Ctrl to select more than one target audience) **④**

Order results by: Participant name ▾ **⑤**

▸ Submit  ▸ Reset **⑥**

**⑦** **⑧** **⑨**

9 records found | 🖨 Printer friendly | 📊 Download to Excel |
Page 1 of 1

| First name | Last name | Register status | Department | Event title | Subjects | Start date | Time of event |
|---|---|---|---|---|---|---|---|
| Julie | Ferroni | Not marked | L&D Operations Team | Delivering Effective Supervision Under Pressure | Coaching and mentoring / Management / Wellbeing | Thursday 29 March 2012 | 09:30 - 16:00 |
| Kevin | Flores | Attended | L&D Operations Team | Diabetes Awareness: a workshop for carers (CTC) | Health Care | Friday 16 March 2012 | |
| John | Gisby | Not marked | L&D Operations Team | Delivering Effective Supervision Under Pressure | Coaching and mentoring / Management / Wellbeing | Thursday 29 March 2012 | 09:30 - 16:00 |
| John | Gisby | Not marked | L&D Operations Team | Manager's Forum (CTC) | Legislation / Management | Thursday 20 October 2011 | 10:00 - 12:00 |
| John | Gisby | Did not attend | L&D Operations Team | Independent Safeguarding Authority Safeguarding Workshop | Safeguarding | Wednesday 7 December 2011 | |
| John | Gisby | Attended | L&D Operations Team | Independent Safeguarding Authority Safeguarding Workshop | Safeguarding | Thursday 8 December 2011 | |
| Jamie | Martin | Not marked | L&D Operations Team | Delivering Effective Supervision Under Pressure | Coaching and mentoring / Management / Wellbeing | Thursday 29 March 2012 | 09:30 - 16:00 |
| Lois | Underwood | Not marked | L&D Operations Team | Delivering Effective Supervision Under Pressure | Coaching and mentoring / Management / Wellbeing | Thursday 29 March 2012 | 09:30 - 16:00 |
| Lois | Underwood | Attended | L&D Operations Team | Common Assessment Framework | Common Assessment Framework | Tuesday 10 January 2012 | 09:30 - 15:30 |

## For Your Reference…

1. If lots of events have been attended by staff there may be several pages to view

## Handy to Know…

- If you are not sure what the event subject or target audience is then leave those areas **unclicked** and all will be included

- If you are not sure what the date range is leave both set to **anytime** for a complete historical record

# LINE MANAGER REPORTS – STAFF REPORTS

There are two types of reports that you, as a Manager, can run on the Gateway. The second is a **staff report**.

With this report you can list all your staff members, and see at a glance how many bookings they have. The report can be saved as an Excel worksheet.

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## Try This Yourself:

*Before trying this ensure that you have logged into the Gateway*

*To access the **Line Manager Tools** click **My Learning** on the shortcut bar*

**1** Click on **staff report**

*The **Staff Report** reporting option will now appear*

**2** Click the drop down arrows to select a **Date range**

**3** Choose **Event subject/s** (to multi select keep **Ctrl** pressed as you click)

**4** Choose **Target audience/s** (to multi select keep **Ctrl** pressed as you click)

**5** Click the drop down arrow to choose what **Attendance** you want your report to display

**6** Click **Submit**

**7** The report will now appear at the bottom of the screen (you will need to scroll to see it)

**8** To save the report as an Excel file click **Excel Version**

**9** To see what the staff member is booked on click **Show details**

---

**1**

staff report

Line Manager Reports

| | | | Back to My Learning |
|---|---|---|---|
| Report | Staff Report | | |
| LA | West Sussex County Council | | |
| Establishment | L&D Operations Team | | |
| Date range | Anytime to Anytime | **2** | |
| Event subjects | Assessment / Care Management / Child Protection and Safeguarding / Children and Young People / Coaching and mentoring / Common Assessment Framework / Communication and Writing Skills / Customer Service / Day Services / Dementia (Hold down Ctrl to select more than one subject) | **3** | |
| Target Audience | Adult Services / All WSCC Staff / Approved Mental Health Professionals (AMHP) / Care Homes / Care Training Consortium members / Children and Young People in Care / Children Services / Communities and Infrastructure / Corporate functions / Customers and Change (Hold down Ctrl to select more than one target audience) | **4** | |
| Attendance | All bookings | **5** | |

▶ Submit  ▶ Reset

**6**

**7**                                                                 **8**

3 staff found                                        Excel Version (3 staff)

Page 1 of 1

| First name | Last name | Bookings (all) | Options |
|---|---|---|---|
| Kevin | Flores | 1 | Show details |
| John | Gisby | 2 | Show details |
| Lois | Underwood | 1 | Show details |

---

## For Your Reference…

1. If you have a lot of staff members there may be several pages to view

## Handy to Know…

- If you are not sure what the event subject or target audience is then leave those areas **unclicked** and all will be included
- If you are not sure what the date range is leave both set to **anytime** for a complete historical record

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# CONCLUDING REMARKS

## Congratulations!

You have now completed the **West Sussex Learning and Development Gateway Manager's Guide** booklet.  This booklet was designed to get you to the point where you can competently perform a variety of operations as outlined in the task list on page 3.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

## Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the Gateway's features. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.

- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the work place!

Here are a few techniques and strategies that we've found handy for learning more about using the Gateway:

- add all and any external learning that you do: magazine/journal articles, books, dvds, podcasts, webinars. They all count

- take an interest in what your work colleagues have done and how they did it – you can certainly learn from the techniques of others

- finally, don't forget to contact Learning and development Admin on **01243 756834**