The Gemba Academy Learning System Manager Guide is designed to assist managers with system administration.

If you have any questions, please contact Gemba Academy Customer Care at +1(888) 439-8880 X105 or brita@gembaacademy.com.

This Guide has the following sections:

- **The Manager Role** – Quick summary of capability
- **User Groups** – How users are organized
- **Users** – Adding users to user groups
- **Learning Paths** – Standard learning paths; Leveled learning paths; Creation of custom learning paths
- **Publishing Tool** – Adding events and announcements
- **Manage Course Completion** – Manually marking courses complete
- **Reports** – Report on progress of training videos and support materials
- **Reports Dashboard** – Visual display of reports
- **Manager Dashboard** – Shortcuts to manager functions

The Manager Role

1. Go to https://lms.gembaacademy.com and log in as Manager for your company.
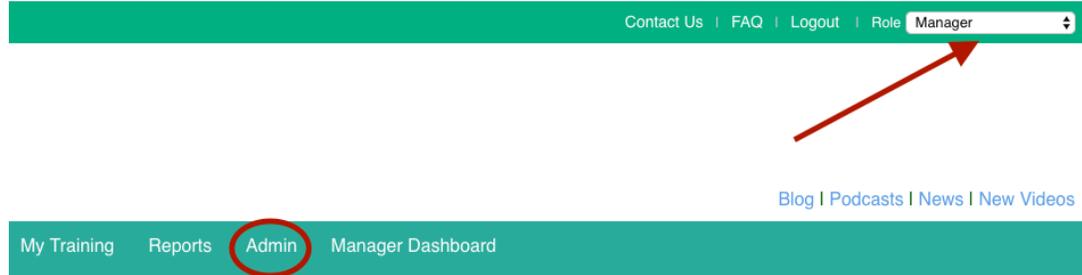
2. Click Admin to see the Manager menu grouping.

3. You will see primary Manager menu boxes for Manage Courses, Manage User Groups, Manage Learning Paths, Manage Users, and Publishing Tool. We will walk through the User Groups, Users, Learning Paths, and Publishing Tool sections.

Manager Home

Expand/Collapse All +

☰ Manage Courses	👥 Manage User Groups	🐾 Manage Learning Paths
👤 Manage Users	🔧 Publishing Tool	
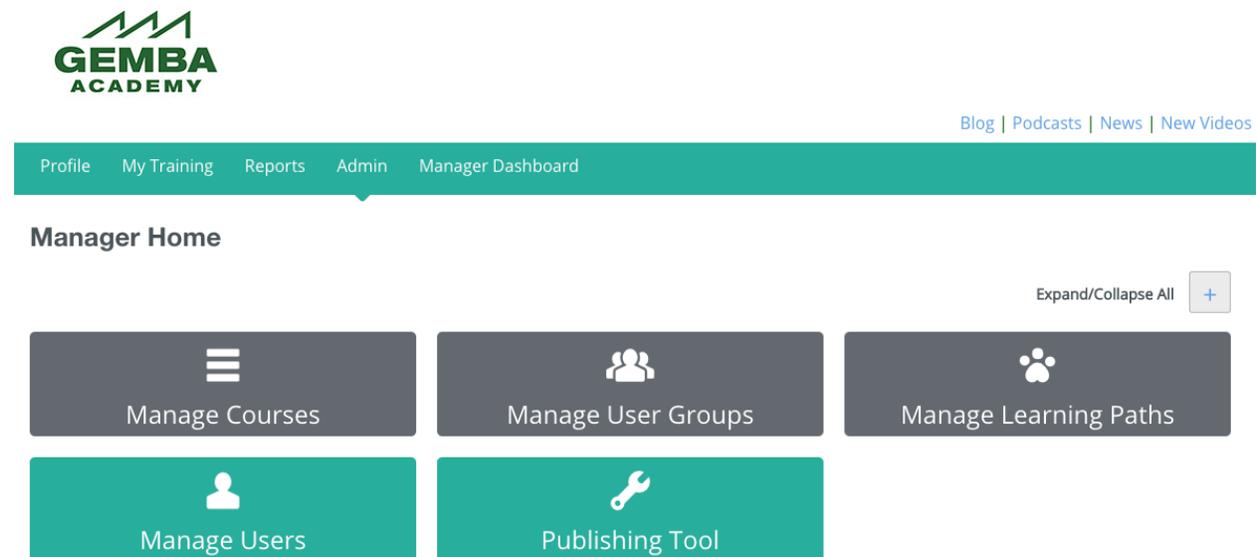
User Groups

1. Main User Groups is a group of learners in your company. Subgroups are how those users are organized within your company. They are hierarchical and nested, with Manager authority provided for each group beneath the level you have access to. User Groups and Subgroups control which content can be seen, custom learning paths, and communities.
2. **User Group Setup**: Gemba Academy Customer Care will create your main user group and any subgroups you request.
3. **User Group Managers**: You, as a manager, will receive your username and password. Multiple managers, can be set up upon request.
4. **Generic Manager/ Administrator**: Your Generic Manager/Administrator will be set up for you as well and credentials will be provided. (This role is discussed further in the Learning Paths section.)
5. Click on Manage User Groups to go into that management screen.
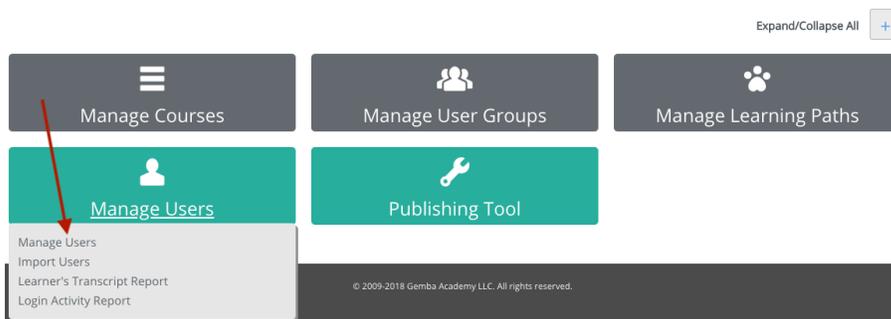
6. You will see the groups that you have Manager authority for. Generally, this is your whole company, your department, or your specific grouping of users. Yours will be different than the example below. Each group listed is a link into the users available for that group.
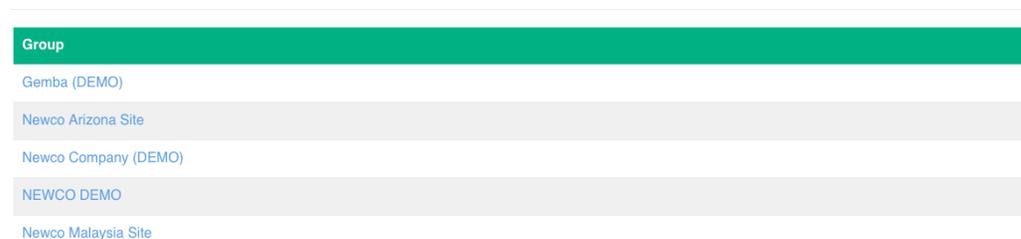
7. In this example, there are five user groups, with the top level being the overall company group, then the three sites/subgroups within the company. Gemba Academy Customer Care can create additional subgroups under your main group if you would like.
8. Users, also called Learners, will be added to the main company group and then into any subgroups you would like. How to add Learners/Users to each group is covered

in the Users section of this guide. If a user is a member of a subgroup, he or she is also a member of the main company group.

9. Should you have an existing learner in the Learning System and you would like to add to them to a subgroup, you click on the subgroup you would like to move them to.

Group
Gemba (DEMO)
Newco Arizona Site
Newco Company (DEMO)
NEWCO DEMO
Newco Malaysia Site
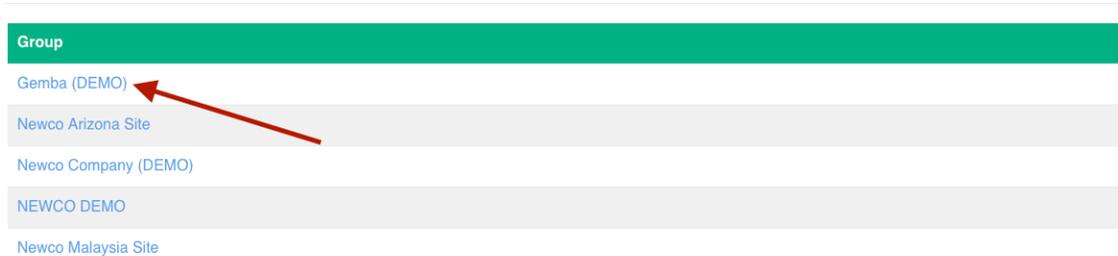
10. Add or Remove Learners to the subgroup by selecting their name and clicking Add or Remove, then Save and Exit. If they are not an existing Learner yet, you will add them to the Learning System first. This is detailed in the next section labeled Users.

Manage User Group Members

Group Name: Gemba (DEMO)

Number of active users in this group: 1
Number of inactive users in this group: 0
Number of spaces left in this group: Unlimited

| First Name | Last Name | User Name | Email | Search | Clear |

Sort Users By

First Name

Filter By User Group

[All Groups]

List of Users

Gina User (demouser)
James User (demouser1)
Jennifer Scott (jennifer1@gembaacademy.com)
Jennifer Scott (jennifer2@gembaacademy.com)
Jennifer Scott (jennifer3@gembaacademy.com)
Jennifer Scott (jennifer4@gembaacademy.com)
Test Quella (Test@gembaacademy.com)

Add

Remove

Users Added To This User Group

Joe Demo (demomanager)

Users

The Manage Users menu area lets you add users to your company's account, after which they can be added to various user subgroups.

1. Click on the Manage Users link in the Manage Users box to get started.
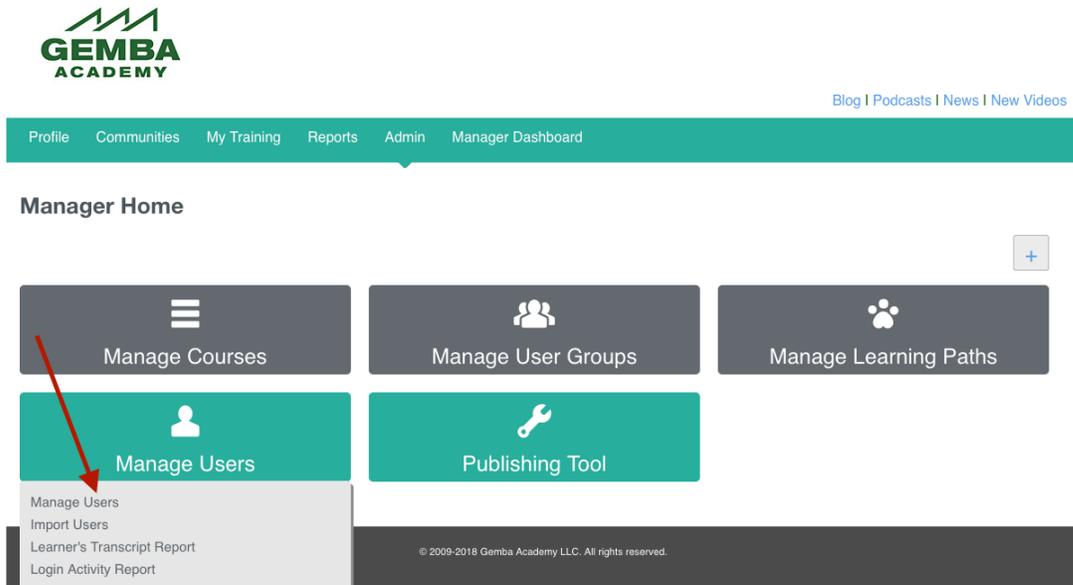
2. You will see a list of all users in your company's account.

3. From this screen you can edit, enable/deactivate, change the password, and view the login activity of any user. You cannot delete or disable your own Username profile. Users who have the role of Learner and Manager will have more than one listing. Editing one edits both.

4. There are three ways to add new users:
   a. One at a time by the manager via the Manage Users screen, or
   b. User/Learner self-register, with a code (The code is provided to you by Gemba Academy.) associated with the appropriate User Group, or
   c. A completed spreadsheet (CSV template provided) returned to Gemba Academy Customer Care to adjust and import for you.
5. Naming Convention: Please use email addresses as usernames. Usernames MUST be unique across all Gemba Academy Learning System users.
6. **Add New Users/Learners one at a time**
   a. From the Manage Users screen you can individual users by clicking on the Add User option.
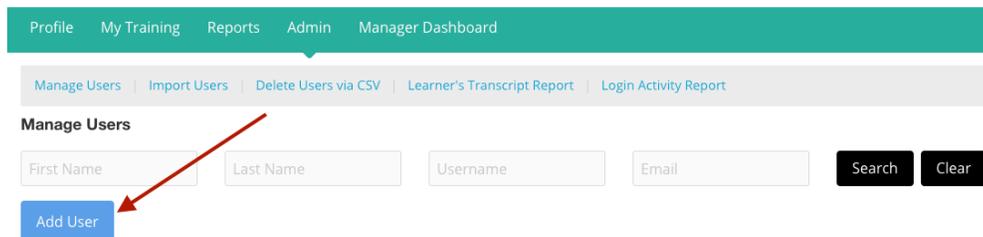
   b. You will enter all the required information as denoted with a star. The first 3 boxes will be the same information since the username is the email address. Passwords can be changed by the individual at any time from the main login page, https://lms.gembaacademy.com or can be reset by the manager when needed.
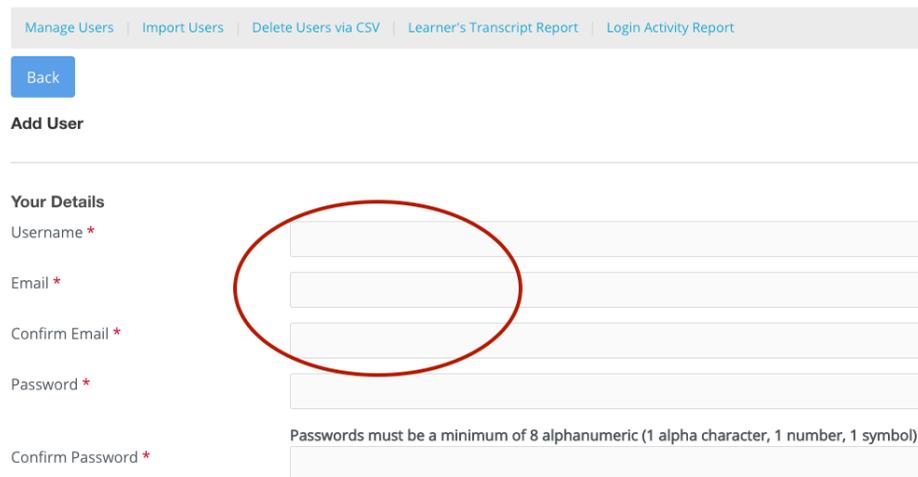
c. At the bottom of the Add User signup screen select which User Groups in your account the new person is to be assigned to. Always choose the main group and any sub group they will be in.
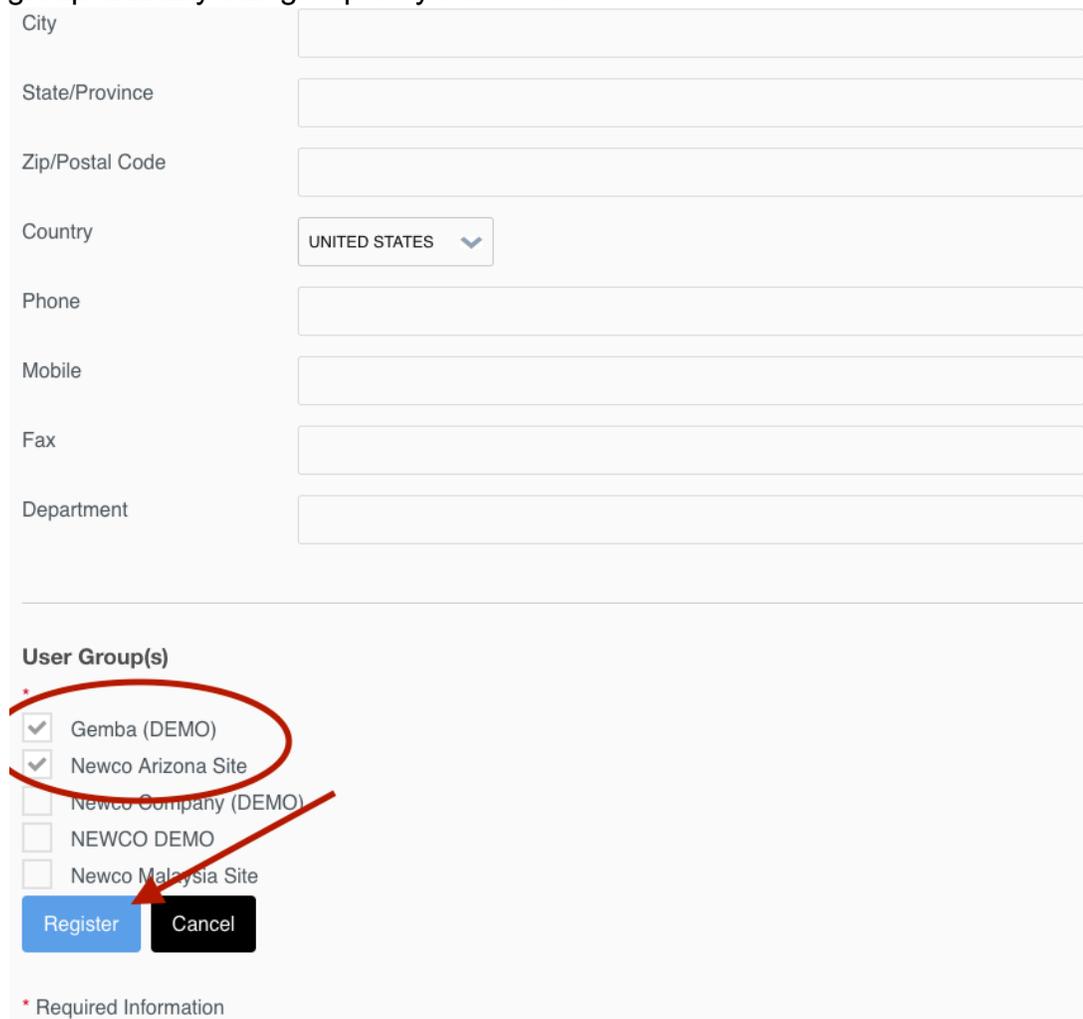
d. After you enter each click Register. This will send an auto email to the User to log in via https://lms.gembaacademy.com

7. Add New Users via Self Registration

a. Each User Group has a unique code that Gemba Academy Customer Care will provide to you.

b. Email each new user, asking them to go to: https://lms.gembaacademy.com and click on the "Not registered yet? Sign up here" link.
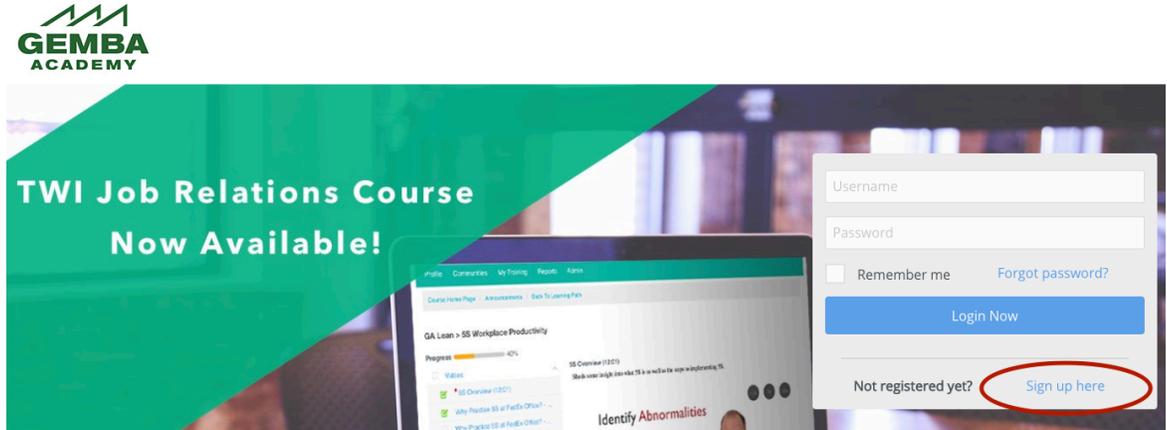
c.

d. This link will open up a sign-up form. All starred items are required by the Learning System. The first three boxes will be their email address. The Code is the User Group unique code provided by Gemba Academy Customer Care.

Learning Paths

1. Learning Paths are groups of FULL courses. The Gemba Academy three standard Learning Paths can be provided to all users or a subgroup of users. The standard Learning Paths are **School of Lean**, **School of Six Sigma**, and **Gemba Academy Live**. You may have also purchased the **Escuela Lean** Learning Path.
2. You may also request the pre-created Leveled Learning Paths for the following: **Lean Associate, Lean Champion, Lean Leader.** These are a combination of course videos for suggested learning levels. Details on videos included can be found in the Manager Resources learning path assigned to your generic Manager login.
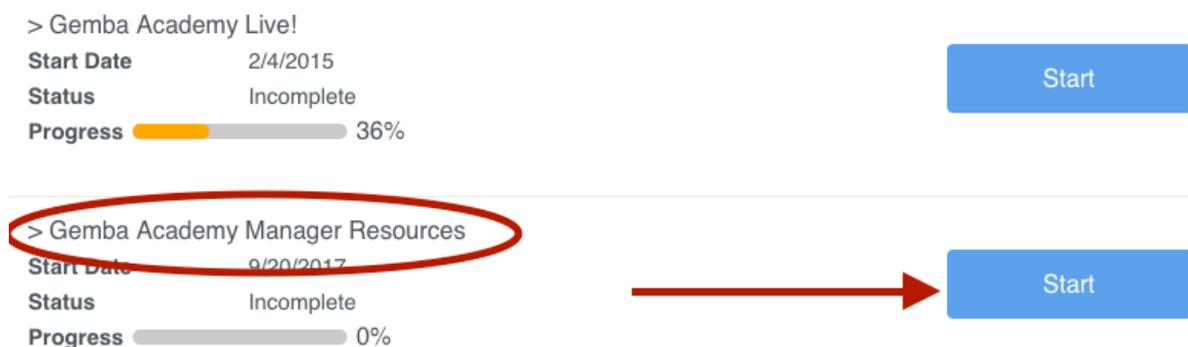
> Gemba Academy Live!

Start Date	2/4/2015
Status	Incomplete
Progress	36%

Start

> Gemba Academy Manager Resources

Start Date	9/20/2017
Status	Incomplete
Progress	0%

Start

Choose the Lean Associate/Champion/Leader. Click "Download here."

GA Learning System Manager Resources

Progress ████ 50%

<

- ☐ Lean Enterprise Strategy Kit
- ☑ Lean Enterprise Assessment
- ☐ PowerPoint Presentations
- ☐ Quiz Answers
- ☑ Lean Associate/Champion/Lead..

Lean Associate/Champion/Leader Learning Paths

Download the list of courses and other content in the Lean Associate, Lean Champion, Lean Leader learning paths. If you do not have these learning paths, please contact us.

Download here

3. **Custom Learning Paths:** Logged in as the Generic Manager, you can create custom Learning Paths and assign them to your users by User Group. This means that your entire organization can share a Learning Path, or it could be assigned to a subgroup.
   a. Please note: ONLY the person/login can edit a learning path they have created. Using the Generic Manager credentials for this function allows for sharing of these credentials to manage and edit custom Learning Paths.
   b. Choose the Admin tab and select the Manage Learning Paths box.
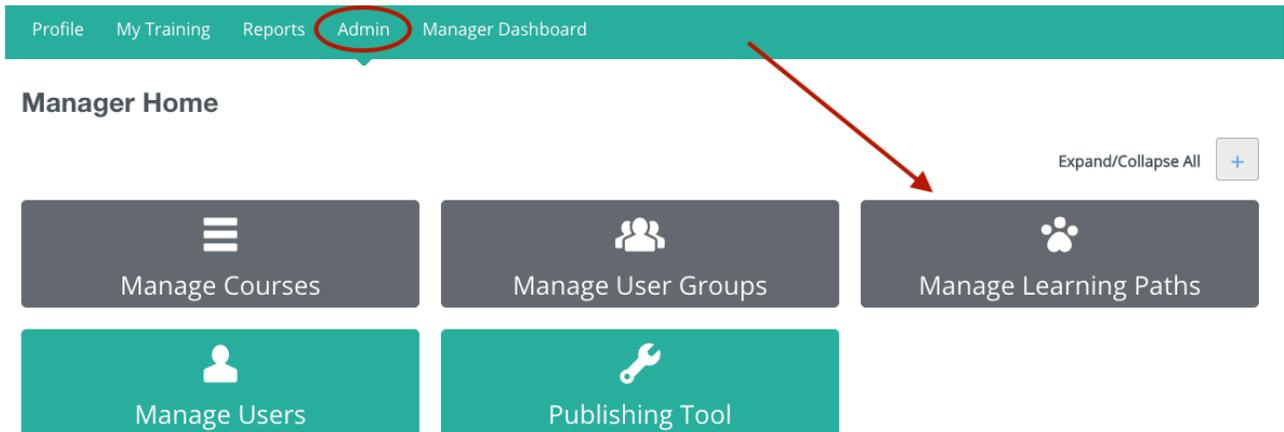
4. If you have already created custom Learning Paths, they will be displayed. In this example, the "(Your Company name) Onboarding" Learning Path is the only one that can be edited because it was created by this manager. (Yours list will look different.)

5. To create a new custom Learning Path click on Create New Learning Path
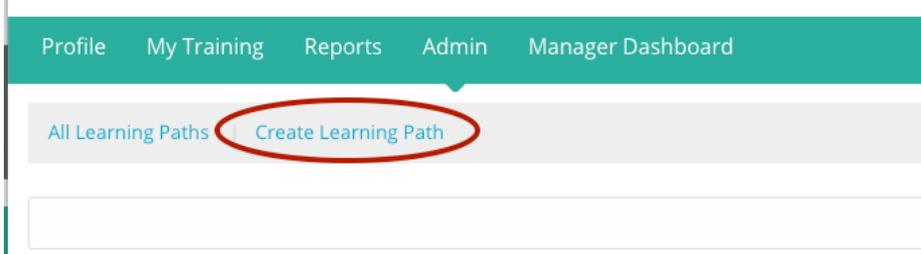
6. Name your custom Learning Path starting with the name of your company.
7. The start date will default to the day you create the learning path. You can choose to have the be a future date if you would like.
8. If you wish for the Learning Path to go away on a certain date, enter that in End Date, otherwise leave blank.

Create Learning Path

Learning Path Name *

Modified By   Modified Date

Description
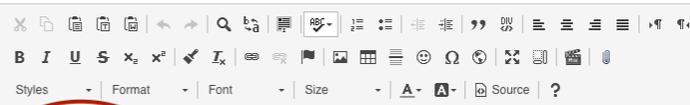
Start Date   7/9/2019   End Date

9. Now that you have named your custom learning path you will choose the FULL courses you would like included.

Learning Path Information ⓘ >   Learning Path Publishing Tool ⓘ >

Learning Path Content ⓘ >   Manage Notes ⓘ >

Manage Users ⓘ >   Delete Learning Path ⓘ >

a. Click on Manage Courses.

Learning Path Content >

This section is used to manage Learning Path content for this Learning Path.

Manage Courses
Manage Materials

b. Choose courses you would like by checking the box next to the course name.

Manage Courses

Learning Path Name: Demo Learning Path

◉ Courses   ○ Materials

① ② ③ ④ ⑤ >>

Select	Courses
☐	GA Lean > 3P Production Preparation Process
☐	GA Lean > 5S Workplace Productivity
☐	GA Lean > A3 Thinking
☐	GA Lean > Built in Quality
☐	GA Lean > Culture of Kaizen
☐	GA Lean > Dealing With the Seven Deadly Wastes
☐	GA Lean > Dealing With the Seven Deadly Wastes (old)
☐	GA Lean > Gemba Glossary
☐	GA Lean > Hoshin Planning

c. Checking the box adds the course to the bottom of the screen where you can sequence the courses if you would like. Leave zeros if the Learner can complete the courses in any order.

☑ GA Lean > Kaizen Way

☑ GA Lean > Kanban

☑ GA Lean > Leader Standard Work Course

Selected Courses/Materials for Learning Path ⓘ

Title	Sequence Number
GA Lean > Dealing With the Seven Deadly Wastes (old)	0
GA Lean > Culture of Kaizen	0
GA Lean > 5S Workplace Productivity	0
GA Lean > Leader Standard Work Course	0
GA Lean > Kanban	0
GA Lean > Kaizen Way	0

d. Add sequence numbers if you would like the Learners to complete one course before being allowed to start the next course.

GA Lean > Dealing With the Seven Deadly Wastes (old)	1
GA Lean > Culture of Kaizen	2
GA Lean > Leader Standard Work Course	3
GA Lean > 5S Workplace Productivity	4
GA Lean > Kaizen Way	5
GA Lean > Kanban	6

10. To make the new Learning Path available to users, use the links in the Manage Users box under Manage Learning Paths of the Learning Path being managed.

Demo Learning Path

- Learning Path Information >
- Learning Path Content >
- Manage Users >

a. You may assign a Learning path to an individual Learner or you may assign it to your main group or subgroup. Use Manage User Groups to assign to a

Manage Users >

This section is used to manage users of Learning Path

Manage Users
Manage User Groups

group.

b. Choose your subgroup by choosing Expand All on the right side and the subgroup. If you choose the main group all subgroups will get the training. If you assign it to only a subgroup only learners in that subgroup will get the training.

Learning Path Groups

Learning Path Name: Demo Learning Path

Expand All ☑

☐ Newco Company (DEMO)

☐ Newco Arizona Site

☐ Newco Malaysia Site

c. Click Save and Exit.

11. To edit or delete any Learning Path you had previously created choose Mange Learning Paths.
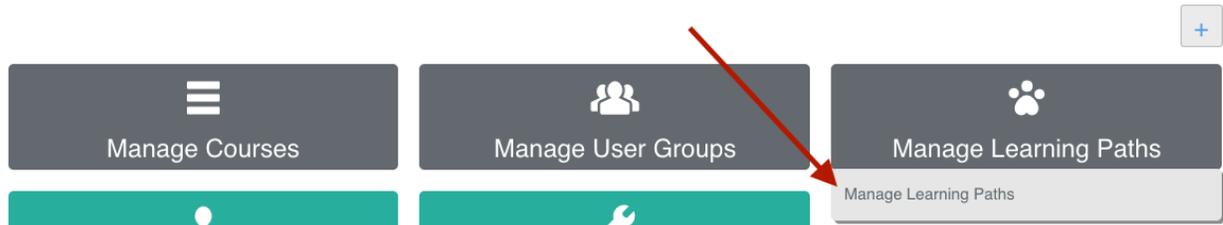
12. Click on the name of the Learning Path to edit.

Learning Path List ^	Date Created
(Your company name) Onboarding	10/26/2017
> Gemba Academy Live!	2/4/2015
> Gemba Academy School of Lean	2/4/2015
> Gemba Academy School of Six Sigma	2/4/2015
Demo Learning Path	1/16/2018

13. Edit desired information and click save.

Publishing Tool

The Publishing Tool lets you add events and announcements associated with your account. These will be shown on the Profile pages of users in User Groups associated with your account. The message can be emailed to the learners as well. NOTE: These messages show sent from academy@gembaacademy.com. If you want learners to reply to you directly specify this in the announcement message.
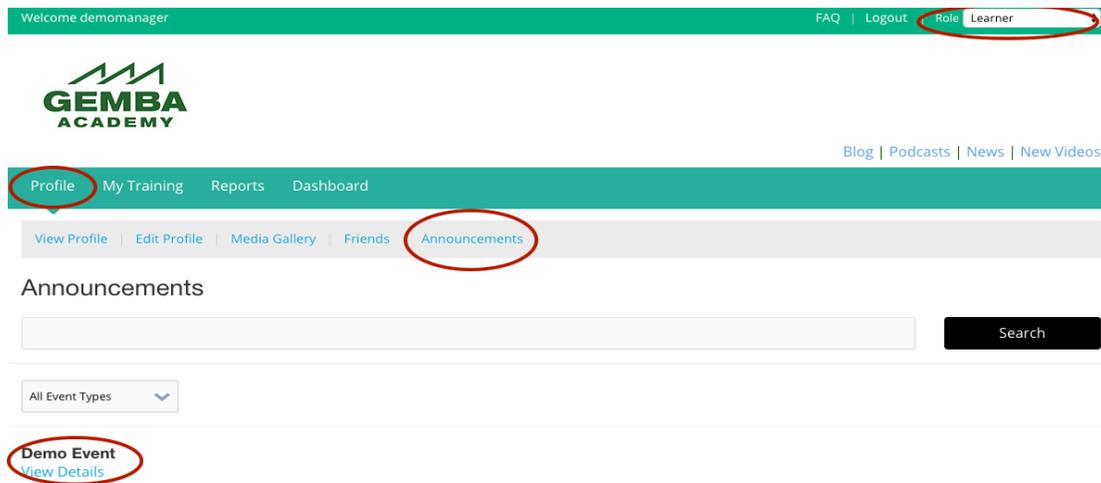
1. To access the Publishing Tool, go to the main Admin link on the horizontal menu, then click on Publishing Tool in the Publishing Tool box. Previously published Events can be viewed and/or edited from here too.
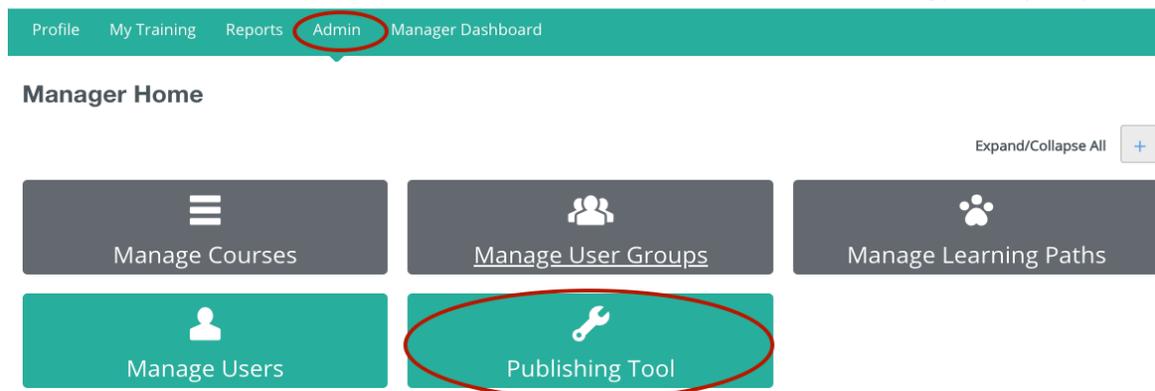
2. Fill in all information about this event you would like. Choose what group(s), you would like to share this announcement with. All learners in that group will see this event/announcement.

Event

Create an Event to share news on upcoming activities or new content that is available for registration.

| Title * | Demo Event |

Event Type * Announcement

Visible To User Groups

Make this item visible to members
of the following User Groups

- ✓ Demo Company
- ☐ Demo Company - Arizona Site
- ☐ Demo Company - Associate Level
- ☐ Demo Company - Malaysia Site

Date 7/9/2019

3. Email can be sent to the learners as well by choosing Email immediately or on a specific date. Add description(s). Click save. NOTE: These messages show sent from academy@gembaacademy.com. If you want learners to reply to you directly specify this in the announcement message.

☐ Add to Calendar

Background Color

Display Location ✓ Display event on profile page
☐ Display event on community home page

File Attachment ⓘ [Find Document] [Clear]

Notification Email Send Immediately

☐ Add iCalendar to Notification Email

[Save] [Cancel]

Manage Course Completion

Although the Learning System is designed to be used online by individuals, we recognize that some training will occasionally be performed in a group setting. It is possible for the Manager to manually mark courses as complete.

If your learners have not registered for the course, you will have to add them to the Course Roster before you can mark the course complete. If they have registered for the course skip down to the section below labeled Already Registered – Mark Course(s) Complete.

Not Yet Registered for The Course(s) – Add to Roster

1. From the Admin menu, click on Manage Courses in the Manage Course box.

2. Click on the course name that you wish to manually mark as complete.

3. Choose Course Roster and Manage Roster

GA Lean > 5S Workplace Productivity

⚖️ Course Grade >

🏫 Sessions >

📇 Select Certificate >

📋 Course Roster >

This section is used to manage Learners enrolled in this course.

Course Roster
Manage Roster
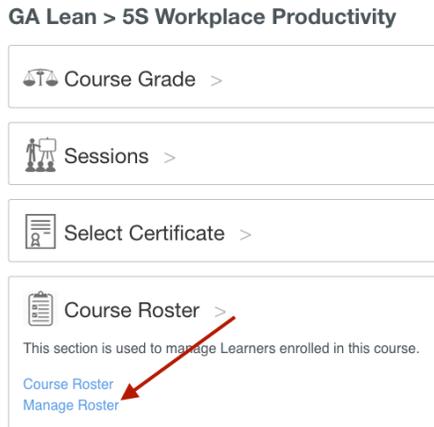
4. Highlight learners from your group on the left and add them to the group on the right with the Add button.

Manage Course Roster

Course Name: GA Lean > 5S Workplace Productivity

First Name	Last Name	User Name	Search	Clear

Sort Users By

First Name ⌄

Filter By User Group

[All Groups]

Available Learners

James User (demouser1)
Jennifer Scott (jennifer1@gembaacademy.com)
Jennifer Scott (jennifer2@gembaacademy.com)
Jennifer Scott (jennifer3@gembaacademy.com)
Jennifer Scott (jennifer4@gembaacademy.com)
Test Quella (TestQuella)

Add

Remove

Learners Enrolled In This Course

Gina User (demouser)
Joe Demo (demomanager)

Save   Save and Exit   Cancel

Already Registered – Mark Course(s) Complete

1. From the Admin menu, click on Manage Courses in the Manage Course box.

Profile   My Training   Reports   Admin   Manager Dashboard

Manager Home

Expand/Collapse All   +

☰ Manage Courses	👥 Manage User Groups	⚛️ Manage Learning Paths

Manage Courses
View Course and Session Request

Manage Users	🔧 Publishing Tool
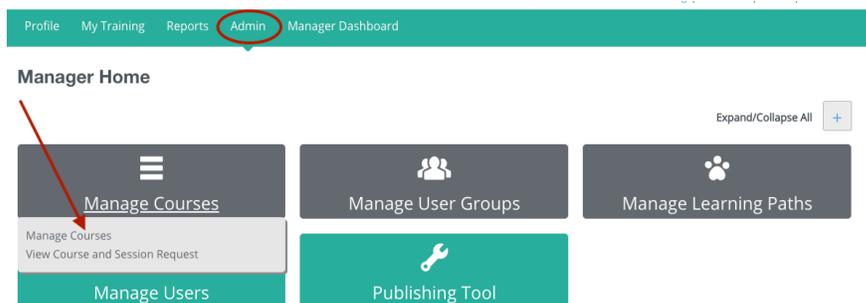
2. Click on the course name that you wish to manually mark as complete.

Manage Courses

Filter Courses ⌄

Course ⌃
GA Lean > 3P Production Preparation Process
GA Lean > 5S Workplace Productivity
GA Lean > A3 Thinking
GA Lean > Built in Quality

3. Click on Course Grade

GA Lean > 5S Workplace Productivity

⚖ Course Grade   >

🏫 Sessions >

📋 Course Roster >

📜 Select Certificate >

4. Choose Mark Course Completion

GA Lean > 5S Workplace Productivity

⚖ Course Grade >

This section is used to manage Course grade.

Mark Course Completion

5. You can choose to mark the entire course complete for all users OR choose a learner by clicking on their name.

Learner Name (Username)
Gina User   (demouser)
Joe Demo   (demomanager)

☐ Mark all users complete

6. If you would like to mark a part of the course complete instead, find the item you would like to mark complete. Fill in grade, date and check box to show complete. Click save.

5S Course Quiz	Content	Required	0		📅	☐

☐ Mark all elements completed
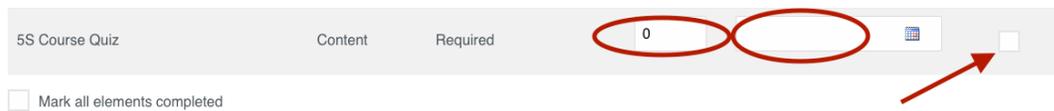
Reports

1. **Run Reports**: The Manager role has access to reports associated with their account. This can be accessed from the Reports link on the main horizontal menu. All reports have multiple filter choices. They may also be exported, emailed, and scheduled for reoccurring emails.

Profile	My Training	Reports	Admin	Manager Dashboard

Dashboard | **Report List**

◢ Program, Course and Material Reports
  Course Completion
  ◢ Course Progress
    CP Report - Reg Date
  Grade Book
  Learning History Report
  Learning Path Report
  Material Completion Report

◢ User Reports
  Learner Transcript
  ◢ Manage User Report
    MU Report - no date filter
  Manager Activity Report
  Manager Report
  Report Card
  User Login Report
  User Registration

◢ Catalog Reports
  Expense Report

◢ Administration Reports
  Inactivity Report
  Scheduled Reports

Course Progress Report: List of users, the courses they are registered for, percentage of the course they have completed and the user groups they are in. Choose the Registration Date filter. Choose the range of dates you would like to see up to a six month range. Click Apply.

Learning Path Report: List of learning paths and users, and amount completed. Choose "No Date Filter" on this report to get the best results. Click on the Learning Path name to see details. You can also click on the individual learner's username to get details on the individual's courses progress. Clicking on the course will give you the learner's progress with in that specific course.

Manage User Report: List of users and user profile details. Customize Layout can be used to change the fields shown.

Report Card Report: List of users. Clicking on the user will display a list of courses they have completed.

Report Card

Filter(s): [Select Filter(s) ▼] [Go]
Date Range Criteria: [No Date Filter ▼]

◁◁ ◁ Page [1] of 1 ▷ ▷▷

User Name	First Name	Last Name	Email	Organization	Date Registered	Date Completed	User Group Name
demomanager	Joe	Demo	demo@gembaacademy.com		11/7/2017	10/25/2017	Newco Company (DEMO), Newco Arizona Site, Gemba (DEMO)
demouser	Gina	User	demo@gembaacademy.com		5/25/2015	4/8/2016	Newco Company (DEMO), Newco Arizona Site

Learner Report Card

User: demomanager (Joe Demo)
Total Credit Hours: 0.00

Filter(s): [Select Filter(s) ▼] [Go]
Date Range Criteria: [No Date Filter ▼]

◁◁ ◁ Page [1] of 2 ▷ ▷▷

Name	Completed	Registration Date	Completion Date	Grade	Enrolled	Date Last Viewed
GA Lean > 3P Production Preparation Process	✗	12/2/2016		100.00	✓	
GA Lean > 5S Workplace Productivity	✓	2/19/2015	4/8/2016	100.00	✓	05/03/2019 01:29 PM
GA Lean > A3 Thinking	✗	1/29/2016			✓	
GA Lean > Built in Quality	✗	3/11/2015			✓	05/31/2019 02:21 PM
GA Lean > Culture of Kaizen	✗	10/5/2015			✓	

User Login Report: List of users, amount of time spent on the site during last login and total Time spent on Site.

User Login Report

Filter(s): [Select Filter(s) ▼] [Go]
Date Range Criteria: [No Date Filter ▼]

◁◁ ◁ Page [1] of 1 ▷ ▷▷

First Name	Last Name	Username	User Group Name	Number of Login Instances	User Last Login	User First Login	Time spent logged in during last login	Total Time spent on Site
Joe	Demo	demomanager	Demo Company, Demo Company - Arizona Site	625	07/10/2019 09:13:49	02/19/2015 12:56:43	17 Minutes 37 Seconds	36 Days 4 Hours 41 Minutes 6 Seconds
Test	Quella	TestQuella	Gemba Academy Company, Demo Company, Demo Company - Arizona Site, GATest	43	07/03/2019 09:28:20	05/24/2017 13:23:04	2 Minutes 5 Seconds	1 Days 5 Hours 4 Minutes 29 Seconds
Jennifer	Scott	jennifer1@gembaacademy.com	Demo Company	1	08/28/2017 18:03:56	08/28/2017 18:03:56		0 Days 0 Hours 0 Minutes 0 Seconds

User Registration
1/1/2015 to 11/25/2015

2. **Scheduled Reports**: You can create a scheduled report by going to the report and clicking on the gear icon at the top right corner. This will open a screen where you can select report format, email address to send it to, and schedule.

Reports Dashboard

1. **Reports Dashboard**: You will click the Dashboard within the Reports tab to access various editable visual reports.

2. Add your reports to your dashboard by choosing Expand and the gear symbol then add the report graphs you like.

3. To customize this report choose the gear symbol with the graph box.
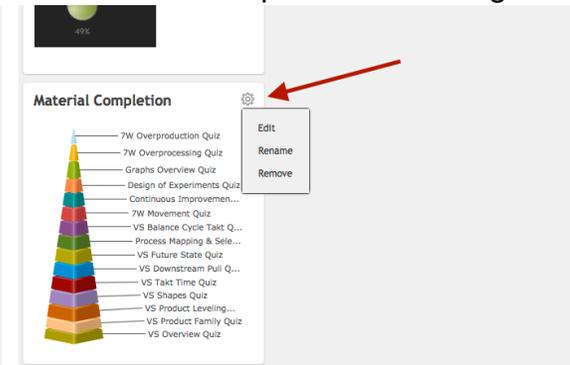
4. Hovering over the graph will show the data collected.

5. You may add, delete and modify your reports at any time.

Manager Dashboard

The Manager Dashboard has convenient shortcuts to the functions found within the Admin tab in the main horizontal bar. Your User Groups, Learning Paths and Announcements are listed on the page.