California State Parks is proud of its reputation for training excellence and is looked upon as a leader in park management, interpretation, maintenance, and public safety training. Employees are the key ingredient for FOCUS to be successful. As a Supervisor, you can manage Learners, Courses Sections, and Enrollments that are tied to your Training Group. (Please note this is an evolving document.)

FOCUS allows Supervisors to:

- View the progress, performance, and engagement of their Learners
- Review and approve training requests at the 1st Level of Approval
- Review and approve course completion requests
- Add training to a Learner’s record and enroll Learner’s in training
- Delegate supervisory approval tasks when away
- Add Continuing Professional Training (CPT) and (SEE BELOW) Learning Paths to Learners

As a Supervisor, you will have all the functions of a Learner, please view the Learner Help File.
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Supervisor Dashboard

To go to the Supervisor Dashboard:

1. Log in to FOCUS, you will be taken directly to your Learner Dashboard.

2. On the left side of the Learner Dashboard, select **Switch to Supervisor** from the dropdown menu. (Any other administrative roles assigned to you will also be listed.)

3. You will be routed to the Supervisor Management Dashboard AKA Management Tab

   It will look similar to:

   ![Supervisor Management Dashboard](image)

To return to your Learner Dashboard:

1. The top right dropdown menu allows you to toggle back to your Learner Dashboard (and other roles if applicable).
Course Requests
Displays any courses that your staff has requested to attend. You can review and approve/deny requests from here. You will also receive email notifications that allow you to act directly on these requests. You can request more information regarding the training.

View Current Course Requests:

<table>
<thead>
<tr>
<th>Learner</th>
<th>Course</th>
<th>Supervisor</th>
<th>Manager</th>
<th>Training Specialist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aloysius (Test Account), Boudreaux</td>
<td>FOCUS TESTING Only 1st Level Approval June 2021 sec. 1</td>
<td>Pending</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Aloysius (Test Account), Boudreaux</td>
<td>FOCUS TESTING Only 2nd Level Approval June 2021 sec. 1</td>
<td>Pending</td>
<td>Pending</td>
<td>N/A</td>
</tr>
<tr>
<td>Aloysius (Test Account), Boudreaux</td>
<td>FOCUS TESTING Only 3rd Level Approval June 2021 sec. 1</td>
<td>Pending</td>
<td>Pending</td>
<td>Pending</td>
</tr>
</tbody>
</table>

You will also receive an email when a Learner submits a request that needs 1st Level Approval where you can take action directly:

Email will contain information regarding the Section and requirements.

---

**Supervisor Action Needed: Pending Employee Training Request**

Dear Supervisor,

Boudreaux Aloysius (Test Account) has requested enrollment in FOCUS TESTING Only 2nd Level Approval June 2021 sec. 1.

Action items will be listed at the bottom (see next page).
1. **View Info**: Will display the Course Requested Information Provided for review

   ![Course Requested Information Provided Table](image)

   - **Is Part Of IDP**: No
   - **Is Job Mandated**: Yes
   - **Is Job Related**: No
   - **Is Upward Mobility**: No
   - **Is Part Of Succession Plan**: No
   - **Is Career Related**: No
   - **Justify**: 
   - **Reason**: 
   - **Leadership Program**: None

   ![Approve Button](image)

   **Approve**: 
   - **1st Level**: Clicking on this will approve the request and send an email notification to the Learner that they have been approved.
ii. If it needs 2nd and 3rd Level Approvals: the request will move to the next person in the approval chain; they will get an email notification and it will appear on their dashboard.

b. Deny: Clicking on this will deny the request and notify the Learner that their request has been denied via email.

c. Req. Info: If you need further information before approving a request, click here and an email will be sent to the Learner.

d. Files: If a Learner has added a file such as an ADP/IDP it will add the FILES button to the choices, clicking on it will bring up the file.

e. Clicking on the download button will bring up the file to review.

f. If a Learner requests to Drop a Course/Section, you will receive an email notification that allows you to approve / decline the request.
Course Completion Requests

Certain courses may require your staff to submit a proof of course completion for credit. You can review, approve/deny, and/or request more information from here.

1. The download button will give you a preview of the certificate
   a. Approve:
      i. Clicking on this will approve the request and send an email notification to the Learner that it has been approved
   b. Req. Info:
      i. If you need further information before approving a request, click here and an email will be sent to the Learner.
   c. Deny:
      i. Clicking on this will deny the request and notify the Learner that their request has been denied via email.

Delegate Manager

You will use Delegate Manager for the times when you will be unavailable to review and approve training requests. (If you are also a Training Group Manager, please use the Delegate Manager function on your Training Group Manager Management Dashboard to change the delegation for that role.) Supervisors should only delegate to other Supervisors (in a Supervisor classification). Training Group Managers must delegate to another person in a Management classification within their Training Group regardless of who is on the list.
To set up delegation

1. From the Delegate Manager block, select Delegate

![Delegate Manager](image)

2. Select the Supervisor you wish to delegate to using the dropdown

![Delegate Manager](image)

3. Select the Start and End dates

4. Select Submit

Documents Pending Approval

Learners may request to add certain documents (e.g. licenses, degrees) to their Profile. You will receive an email notification.

![Document Approval](image)

**Document Approval Needed**

Dear Supervisor/Manager,

This email is being sent to you to request approval for the document: REquest More Info.jpg (April Pilot Testing 2021).

Learner: Alloysius, Boudreaux
File Name REquest More Info.jpg
File Type April Pilot Testing 2021

Please log in to FOCUS to review and approve/deny.
You can review, approve/deny, and/or request more information from here.

![DOCUMENTS PENDING APPROVAL]

1. The download button will give you a preview of the certificate.
   a. Approve:
      i. Clicking on this will approve the request and send an email notification to the Learner that it has been approved.
   b. Deny:
      i. Clicking on this will deny the request and notify the Leaner that their request has been denied via email.

**Managed Learners**
This block lists the Learners that you directly supervise.

![MANAGED LEARNERS]

1. To Add a Learner to your list click on Add.

   ![Add Managed Learner]

   2. Type in a name and click Search
   3. Find your Learner, check the box, and click on Submit
4. If the Learner already exists in the system with a Supervisor, you will get a pop-up notification:

```
caparks.geniussis.com says
One or more learners already have an assigned direct supervisor. Do you still want to proceed and override the current assignment?
```

5. Click on OK, an email will be sent to the previous Supervisor notifying them that you have made this change.

6. You will now have the Learner in your list.

7. If a Learner leaves/transfers; it is best to allow their new Supervisor to add them. However, you can click on Remove to manage your list.
Training Request Status
All of your Learner’s Training Requests are listed here.

1. You can view the Training Request Status of your Learners, and sort by Learner, Course Name, or Training Date.

Dashboard Tabs

Home Tab
The Home tab is a quick button that currently shows the Recent Learners you have accessed.
The Learners tab lists all Learners you can view based on your Training Group and Role. You may sort, filter, and search. The tab defaults to the Active Learners view.

Search
The search function will allow you to enter a Learner’s name and then view their profile. This is helpful if you have a lot of employees.

Active Learners
A listing of your Active Learners.

Selecting a Learner
Click on the Learner’s name.
Learner Main Information/Main Page

A Supervisor can view the following information on this screen: Basic Information, Continuing Professional Training, Academic Snapshot, Recent Communications, Recent Activity, and Denied Course Requests.

Edit CPT (Continuing Professional Training)

A Supervisor will have the ability to add CPT to their Learners. This function is currently being developed, please do not add or create new CPT until we send out a notification that it is completely ready. We will provide more information at that time.
Academic Snapshot
A quick reference to display what the Learner is currently enrolled in.

Recent Communications
The most current communications regarding training with the Learner

Recent Activity
A table that displays the Learner’s activity within the system.

Denied Course Requests
A table that displays courses that the Learner was denied from attending/completing.
External Files
If a Learner has uploaded external files, e.g. licenses, certificates, etc., they will be displayed here.

Historic Data
The ability to view a Learner’s history and actions in the system.

Learner Log
A log of all actions taken regarding the Learner in the system.
View Training Record
Click on this to view the Learner's Training Record and download it if needed.

![Image of Training Record](image)

Certification Audit
Clicking on this will display the status of a Learner in their applicable Learning Paths.

![Image of Certification Audit](image)

Actions
The ability to add a Learning Path and/or Enroll a Learner in a Section of a Course.

Manage Learning Path
The majority of Learning Paths will be added to the Learners by the FOCUS Administrators; however you may manually add them here if needed. If there is a Learning Path you would like created, please contact the FOCUS Support Team via email. Adding a Learning Path to a Learner will automatically add any available sessions to their pending training.

![Image of Manage Learning Path](image)
Basic Search

Basic Search allows you to run a query based on a number of different fields. You can run one to determine how many of your Learners are enrolled in a specific Section, are enrolled in a Learning Path, etc.
Bulk Learning Path
This function allows you to add a Learning Path to multiple Learners.

1. Using the filters you can run any data query. The most common would be Training Group.
2. Get Data
3. A list of Learners will present
4. Select the Learners you would like to add the Learning Path to.
5. Click on Bulk Learning Path
6. Select the Learning Path
7. A confirmation dialogue box will pop up:

**Bulk Learning Path**

<table>
<thead>
<tr>
<th>Learning Path:</th>
<th>EnHR Series</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date:</td>
<td>6/11/2021</td>
</tr>
<tr>
<td>End Date:</td>
<td>12/8/2021</td>
</tr>
</tbody>
</table>

**Enrollments Tab**

A query builder of the Courses that your Learners are enrolled in. Various search criteria can be applied to refine your results.

**Reports Tab**

An evolving reporting feature. New Reports will be added as they are developed.

**General Reports**

A quick link to two time imperative reports.

**Overview**

A statistical statement of Active numbers in the Department.
Expiration Reminders
A query builder that allows you a quick look at when Learner’s may have a Learning Path or required trainings due.

1. Select Training Group (yours)
2. Select Learning Path or Status to run a report.
3. Click Get Data

Learning Paths
A query builder that allows you to view current Learning Paths assigned to all members of your Training Group.

1. Select Training Group
2. Select Learning Path
3. Click on Get Data

Employee Role Report
1. Click on Employee Role Report for a chart showing the Manager, Supervisors, and Employees within your Training Group.
2. Choose your Training Group and click on View

**Employee Role Report:**

Training group: MOTT District (FOR LMS Training ONLY)

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**Activity**

Reports that display the Learner activity and interest in course offerings (usually if no current Sections are being offered).

**By Learner**

You can run a report of the Activity within a certain time period for Learners. If you want a master report, just select Training Group and click on Get Data.

For specific time ranges:

1. Select Start Date and End Date
2. Training Group
3. Click on Get Data
4. A report will show Learner activity.

---

**Interest In Courses**

If you have several Learner's interested in courses, a report will be beneficial to advocate for a course to be offered.
1. Choose the Course
2. Enter Start and End Dates if applicable
3. Click on Get Data
4. You may also just leave the Course as “Select” to run a full report of all requests.

**Completion**
An action item that needs attention.

**Proof of Completion**
When a Learner has attended an External course equivalent to an existing Internal or Training Catalog Course; they can submit a certificate for approval and posting to their Training Record.

Any pending items will be listed.

1. You will have received an email and the request will appear on your Supervisor Management Dashboard (see above) for action

**Enrollments**
Reports that allow you to view compliance rates for Learners, approve credits, and track Program Compliance.
Requested Credits
If a Learner submits a Request for Credit, you will be able to view and approve/deny it here.

Click on Waiting_Review and Get Data.
From here you can view the document. You will need to compare the course the Learner took with the specifications of the equivalent one in our Catalog. You may approve/deny by line or in bulk.

Compliance Rate
Allows you to run a compliance report on specific Categories, Courses, and/or Sections.
Clicking on Get Data without entering any information will give you an overall report.
Program Compliance

A report builder that allows for overall compliance within a Training Group; can select variable such as Category, Course, Section, and / or Classification.

Clicking on Get Data without selecting field information will display all Learners in the Training Group.

![Search criteria:](image)

![There are 11 Enrollments:](image)

External Files

Learners may request to add certain documents (e.g. licenses, degrees) to their Profile.
External Files Uploaded
A list of the External files. You can review and approve/deny and request more information from here as well as the Supervisor Management Dashboard.

![External Files Table](image)