

Managers Guide

GEMBA ACADEMY Learning System

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

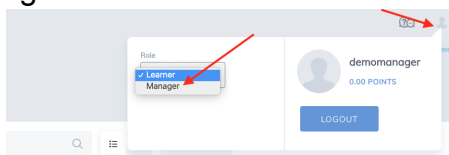
If you have any questions, please contact Gemba Academy Customer Success at +1(888) 439-8880 option #1 or email academy@gembaacademy.com.

This Guide has the following sections:

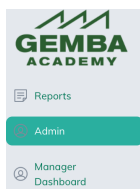
- [The Manager Role – Quick summary of capability](#)
- [User Groups – How users are organized](#)
- [Learners – Adding learners to user groups](#)
- [Learning Paths – Standard learning paths; Leveled learning paths; Creation of custom learning paths](#)
- [Manage Course Completion – Manually marking courses complete](#)
- [Reports – Report on the progress of training videos and support materials](#)
- [Reports Dashboard – Visual display of reports](#)
- [Manager Dashboard – Shortcuts to manager functions](#)

The Manager Role

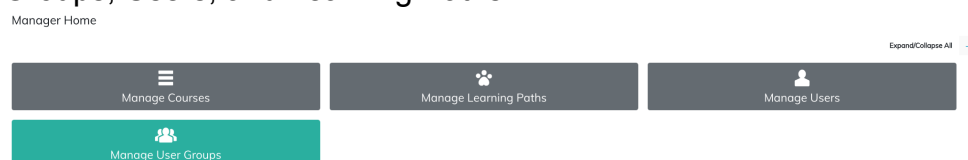
1. Go to <https://lms.gembaacademy.com> and switch to the Manager role in the upper right-hand corner.



2. Click on the Admin box on the left-hand side of your screen to see the Manager menu.



3. The Manager menu boxes are Manage Courses, Manage User Groups, Manage Learning Paths, Manage Users, and Publishing Tool. We will walk through the User Groups, Users, and Learning Paths.

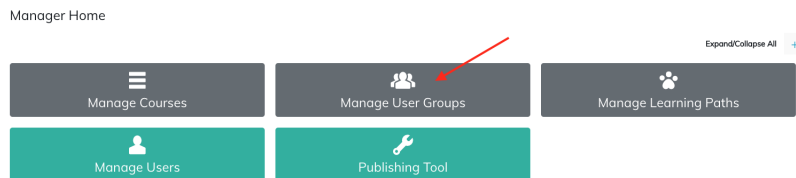


Managers Guide

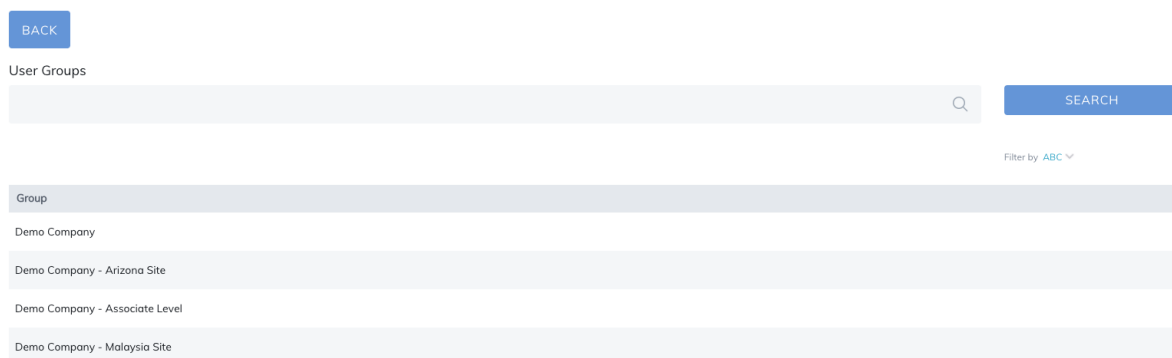
GEMBA ACADEMY Learning System

User Groups

1. **Main User Group:** the entire list of learners from your company.
2. **Subgroups:** optional ways to organize learners and assign training. They are hierarchical and nested, with Manager authority provided for each group beneath.
3. **User Group Setup:** Your Gemba Academy Account Manager will create your main user group and any subgroups you request.
4. **User Group Managers:** As a manager, you will receive an email with your username and a link to set your password. Additional managers can be set up upon request.
5. **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.)
6. **Manage User Groups:** Click on Manage User Groups to go into the management screen.



7. You will see the groups for which you have Manager authority. Generally, this is your whole company, your department, or your specific grouping of users. (Your groups will be different from the example below.) Each group listed is a link to the users available for that group.



8. In this example, there are four user groups, with the top level being the overall company group and the three sites/subgroups within the company. Your Gemba Academy Account Manager can create additional subgroups under your main group.
9. Learners will be added to the main company group and any subgroups. The Learners section of this guide covers how to add learners to each group. If a user is a member of a subgroup, he or she is also a member of the main company group.
10. If you have an existing learner in the Learning System and would like to add them to a subgroup, click on the subgroup to move them.

Managers Guide

GEMBA ACADEMY Learning System

User Groups

Group

Demo Company

Demo Company - Arizona Site

Demo Company - Associate Level

Demo Company - Malaysia Site

11. 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 Learners.

Manage User Group Members

Group Name: Demo Company - Arizona Site

Number of active users in this group: 3
Number of inactive users in this group: 0
Number of spaces left in this group: Unlimited

First Name	Last Name	User Name	Email
Sort Users By First Name			
Filter By User Group [All Groups]			
List of Users			
James User (demouser1) Jennifer Scott (jennifer1@gembaacademy.com) Jennifer Scott (jennifer2@gembaacademy.com) Jennifer Scott (jennifer3@gembaacademy.com) Jennifer Scott (jennifer4@gembaacademy.com)			
ADD REMOVE			
Users Added To This User Group Gina User (demouser) Joe Demo (demomanager) Test Quella (TestQuella)			

Learners

Manage Users lets you add learners to your company's groups.

Click on the Manage Users link in the Manage Users box to get started.

Manager Home

Manage Courses

Manage User Groups

Manage Learning Paths

Manage Users

Publishing Tool

Manage Users

Import Users

Learner's Transcript Report

Login Activity Report

1. You will see a list of all learners in your company's account.

Managers Guide

GEMBA ACADEMY Learning System

[Manage Users](#) | [Import Users](#) | [Delete Users via CSV](#) | [Learner's Transcript Report](#) | [Login Activity Report](#)

Manage Users

First Name Last Name Username Email

[All Groups] All Status Filter by ABC

Username ^	First Name	Last Name	Email	Group	Manage Status	Change Password	Login Activity	Role	
demomanager	Joe	Demo	brita+demomanager@gembaac...	5	Enabled	Change Password	Login Activity	Learner	
demomanager	Joe	Demo	brita+demomanager@gembaac...	5	Enabled	Change Password	Login Activity	Manager	
demouser	Gina	User	demo@gembaacademy.com	3	Deactivate	Change Password	Login Activity	Learner	
demouser1	James	User	demo@gembaacademy.com	4	Deactivate	Change Password	Login Activity	Learner	

- From this screen you can edit, activate/deactivate, change their password, and view the login activity of any learner. You cannot delete or disable your own profile. Learners who have the role of Learner and Manager will be listed twice. Editing one edits both. Managers can edit all learner details with the expectation of their username. Contact your Account Manager to edit a username.
- Ways to add new learners:
 - One at a time:** The manager enters learners via the Manage Users screen
 - Import:** A completed spreadsheet (CSV template provided) returned to your Gemba Academy Account Manager to adjust and import for you. Learners will receive an auto email from the system with their username and instructions to set a password.
If a learner does not have a company email address, you must include a password in the @password column in the import spreadsheet. Managers must communicate the password to the learners, as they will not receive an email with this information.

4. Add New Learners one at a time

Naming Convention: **Please use email addresses as usernames.** Usernames MUST be unique across all Gemba Academy Learning System users.

- From the Manage Users screen you can add individual users by clicking on the Add User option.

[Manage Users](#) | [Import Users](#) | [Delete Users via CSV](#) | [Learner's Transcript Report](#) | [Login Activity Report](#)

Manage Users

First Name Last Name Username Email

[All Groups] All Status Filter by ABC

Username ^	First Name	Last Name	Email	Group	Manage Status	Change Password	Login Activity	Role
------------	------------	-----------	-------	-------	---------------	-----------------	----------------	------

- You will enter all the required information, as denoted with an asterisk. The first three boxes will be the same information since the username is the email address. The learner will create the passwords, which can be updated at any

Managers Guide

GEMBA ACADEMY Learning System

time from the main login page, <https://lms.gembaacademy.com>. The manager can also change them if the learner cannot receive emails.

- c. If a learner does not have a real email address, you communicate the password to the learners, as they will not receive an email with this information.

Manage Users | Import Users | Delete Users via CSV | Learner's Transcript Report | Login Activity Report

BACK

Add User

Your Details

Username *

Email *

Confirm Email *

Password *

Confirm Password *

Title

First Name *

Middle Name

Last Name *

Passwords must be a minimum of 8 alphanumeric (1 alpha character, 1 number, 1 symbol)

- d. Select which User Groups in your account the learner is to be assigned to. Always choose the main group and any subgroup they will be in.

User Group(s) *

☒ Demo Company

☐ Demo Company - Arizona Site

☒ Demo Company - Associate Level

☐ Demo Company - Malaysia Site

REGISTER CANCEL

* Required Information

- e. After you enter each, click Register. This will send an auto email to the Learner to set a password and log in at <https://lms.gembaacademy.com>. It is recommended that this website be bookmarked for future logins.

Learning Paths

1. Learning Paths are groups of FULL courses. Standard learning paths are **School of Lean, School of Six Sigma, Gemba Academy Live, School of Leadership, Escuela Lean, Escuela Seis Sigma, and Lean Akademie.**
2. While planning your training, you can:
 - a. Explore the whole school learning paths to identify courses you'd like to include in your custom learning paths. These are available to everyone who is in the "All Content" subgroup.

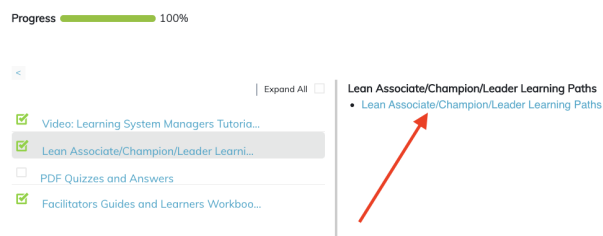
Managers Guide

GEMBA ACADEMY Learning System

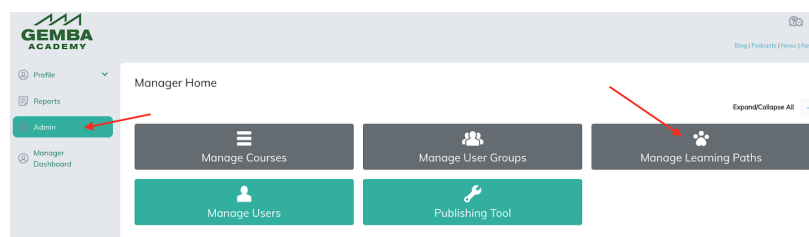
- b. Refer to the [Course Catalog](#) spreadsheet to review course descriptions and the videos each one contains.
 - c. Use the search engine on the Gemba Academy [website](#) to locate specific content. All course content is available through the Learning System.
3. You may request the pre-created Leveled Learning Paths for the following: **Lean Associate, Lean Champion, Lean Leader**. These are a combination of course videos for suggested learning levels. Details on these videos can be found in the Manager Resources learning path assigned to your generic Manager login.



4. Choose the Lean Associate/Champion/Leader. Click “Download here.”



5. **Custom Learning Paths:** Logged in as the Generic Manager, you can create custom Learning Paths and assign them to your learners in the User Group box. 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 the sharing of these credentials to manage and edit custom Learning Paths.
 - b. Choose the Admin tab and select the Manage Learning Paths box.



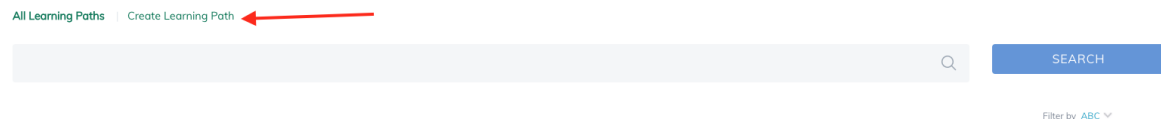
6. If you have already created custom Learning Paths, they will be displayed. In this example, the “Demo Company Onboarding” Learning Path is one that can be edited because it was created by this manager. (Your list will look different.)

Managers Guide

GEMBA ACADEMY Learning System



7. To create a new custom Learning Path click on Create New Learning Path above the list of available learning paths.



8. Name your custom Learning Path starting with the **name of your company**.
9. The start date will default to the day you create the learning path.
10. If you wish for the Learning Path to end on a certain date, enter that date in the End Date; otherwise, leave it blank. You may also add a description of your learning path.

11. You may include a company logo or picture for your learning path as well.

Managers Guide

GEMBA ACADEMY Learning System

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

Demo Company Onboarding

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 ⓘ >

[Manage Courses](#)

[Manage Materials](#)

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

[BACK](#) Manage Courses

Learning Path Name: Demo Company Onboarding

☒ Courses ☐ Materials

124 Items << < 1 2 3 4 5 > >>

Select	Courses
☐	GA Lean > 3P Production Preparation Process
☐	GA Lean > 5S in the Factory and the Warehouse
☐	GA Lean > 5S in the Office
☒	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 > Eight Types of Waste in Healthcare

c. Checking the box adds the course to the bottom of the screen, where you can sequence the courses if you would like.

Selected Courses/Materials for Learning Path ⓘ

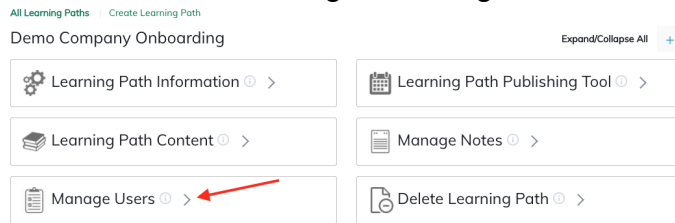
Title	Sequence Number
GA Lean > Introductory Topics	1
GA Lean > 5S Workplace Productivity	2
GA Lean > Dealing With the Seven Deadly Wastes	3

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

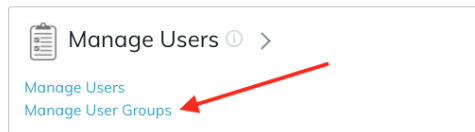
Managers Guide

GEMBA ACADEMY Learning System

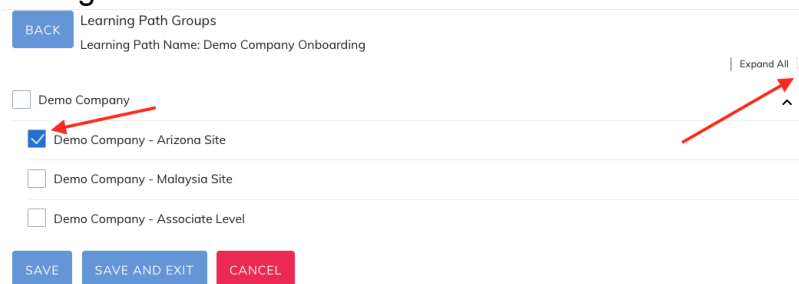
13. To make the new Learning Path available to users, use the links in the Manage Users box under Manage Learning Paths of the Learning Path being managed.



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

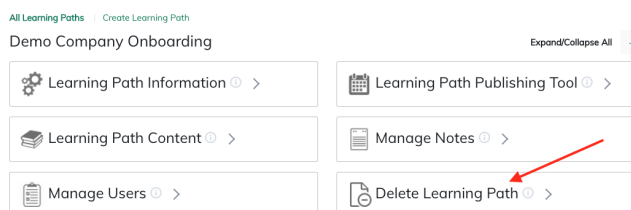


- b. Choose your subgroup by choosing Expand All on the right side and the subgroup. If you choose the main group all subgroups will get the training. If you assign it to only a subgroup, only learners in that subgroup will get the training.



- c. Click Save and Exit.

14. You can edit at any time. Be sure to log in as the manager who created the learning path. To delete a learning path you had previously created, choose Delete Learning Path.



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 must add them to the Course Roster before you can

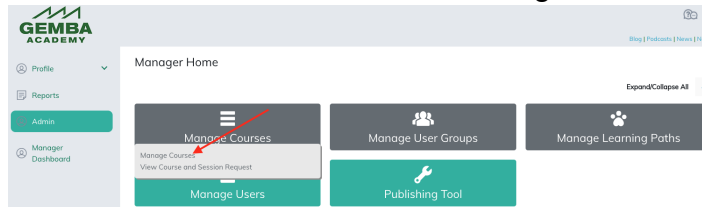
Managers Guide

GEMBA ACADEMY Learning System

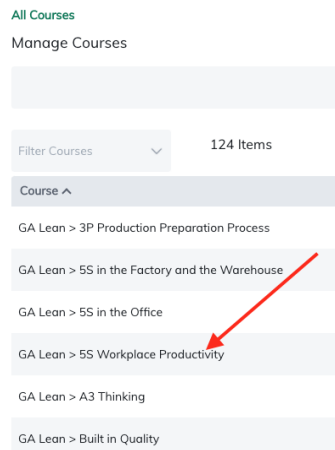
mark the course complete. If they have registered for the course, skip down to the section below labeled Already Registered – Mark Course(s) Complete.

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

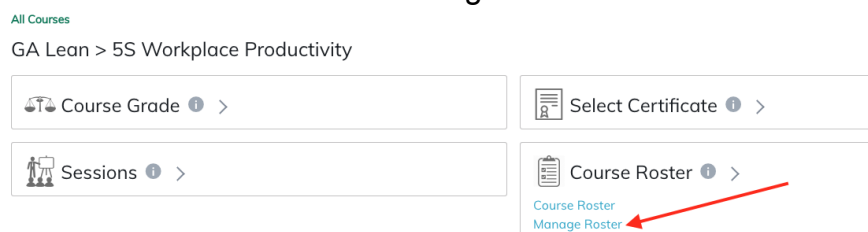
1. From the Admin menu, click on Manage Courses in the Manage Course box.



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



3. Choose Course Roster and Manage Roster



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

Managers Guide

GEMBA ACADEMY Learning System

Manage Course Roster

Course Name: GA Lean > 5S Workplace Productivity

First Name Last Name User Name Email SE

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)

Learners Enrolled in This Course

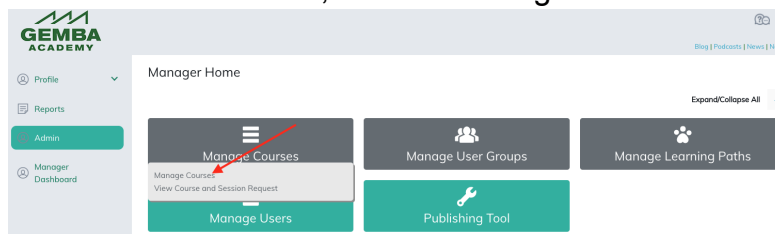
- Gina User (demouser)
- Joe Demo (demomanager)

ADD REMOVE

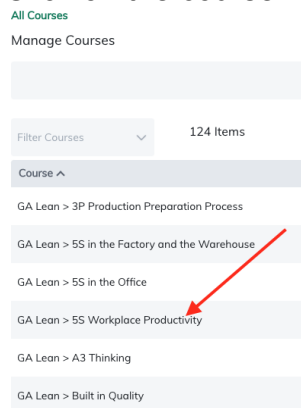
SAVE SAVE AND EXIT CANCEL

Once Registered or Already Registered – Mark Course(s) Complete

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. Click on Course Grade and Mark Course Completion

GA Lean > 5S Workplace Productivity

Course Grade >

Mark Course Completion Mark Expired Course Completion

Sessions >

Select Certificate >

Course Roster >

4. You can mark the entire course complete for all users OR select a learner by clicking on their name.

Managers Guide

GEMBA ACADEMY Learning System

Mark Course Completion

Course Name: GA Lean > 5S Workplace Productivity

First Name Last Name User Name

Learner Name (Username)

Gina User (demouser)

Joe Demo (demomanager)

☐ Mark all users complete

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

Gina User (demouser)

Course Element Name	Type	Status	Weight	Score	Completion Date	Completed
5S Overview (12:01)	Label	Required		100	4/6/2020	☒

Reports

- Run Reports:** The Manager role has access to reports associated with their account. All reports have multiple filter choices. They may also be exported, emailed, and scheduled for recurring emails.

Course Progress Report: List of learners, 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 6-month range. Click Apply. You can schedule this report to be sent to you via email. A scheduled report will allow for a large date range. Choose the “gear” icon to schedule a report.

Course Progress Report

7/30/2022 to 8/9/2022

Customize Layout | Report List | Expand
Create New Bookmark
Manage Bookmarks
Change Theme

Filter(s):

Date Range Criteria:

Date Filter Type:

View a report from: Through:

Page 1 of 1

Course Name	Course Progress	Registration Date	Date Last Viewed	Completion Date	Expiration Date	Due Date	User Group Name	Code	Username	First Name	Last Name	Email
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Managers Guide

GEMBA ACADEMY Learning System

Manage User Report: includes a list of users and user profile details. You can customize the Layout to change the fields shown.

Manage User

Customize Layout | Report List | Expand
Create New Bookmark
Manage Bookmarks
Change Theme

Filter(s): Go

Date Range Criteria:

<< Page 1 of 1 >>

First Name	Last Name	Username	Email	Role	Date Created	User Group Name	Account Status	# of Logins	Last Login Date
Joe	Demo	demomanager	brita-demomanager@gembaacademy.com	Learner, Manager	2/19/2015 11:55:51 AM	Demo Company, Demo Company - Arizona Site	Activated	665	4/6/2020
Gina	User	demouser	demo@gembaacademy.com	Learner	2/19/2015 6:58:22 PM	Demo Company, Demo Company - Arizona Site	Activated	1	5/25/2015

Learning Path Report: List of learning paths, 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 course progress. Clicking on the course will give you the learner’s progress within that specific course.

Learning Path Report
3/25/2020 to 4/6/2020

Create New Bookmark
Manage Bookmarks
Change Theme

Filter(s): Go

Date Range Criteria:

Date Filter Type:

View a report from: Through: Apply

<< Page 1 of 1 >>

Learning Path Name	# of Learners Enrolled	# of Completions
Demo Company Onboarding	5	0
Gemba TEST with logo	1	0

Learning Path Details Demo Company Onboarding to

Learning Path Report [Customize Layout](#)

Date Range Criteria:

Date Filter Type:

View a report from: Through: Apply

<< Page 1 of 1 >>

Learning Path	Username	First Name	Last Name	Enrolled	Registration Date	Completed	Completed Percentage	Completion Date	User Group Name	Lastloggedin	Numberoflogin
Demo Company Onboarding	demouser1	James	User	✓	4/6/2020	✗	0.00%		Demo Company, Demo Company - Malaysia Site, Demo Company - Associate Level		

Managers Guide

GEMBA ACADEMY Learning System

Learning Path User Details

demouser1

3/7/2020 to 4/6/2020

Date Range Criteria: Registered Date

Date Filter Type: Date Range

View a report from: 03/07/2020 Through: 04/06/2020 Apply

Page 1 of 1

Learning Path	Item Type	Item Name	Enrolled	Completed	Percentage Completed
Demo Company Onboarding		GA Lean > Introductory Topics	✗	✗	
Demo Company Onboarding		GA Lean > 5S Workplace Productivity	✗	✗	
Demo Company Onboarding		GA Lean > Dealing With the Seven Deadly Wastes	✗	✗	

Report Card Report: Clickable list of users. Clicking on the user will display a list of courses that the learner has completed. Customize Layout allows you to choose columns in the report.

Report Card

Customize Layout | Report List | Expand
Create New Bookmark
Manage Bookmarks
Change Theme

Filter(s): Select Filter(s) Go

Date Range Criteria: No Date Filter

Page 1 of 1

First Name	Last Name	Username	Email	Organization	# of Logins	Last Login Date
Joe	Demo	demomanager	brita+demomanager@gembaacademy.com		667	4/6/2020
Gina	User	demouser	demo@gembaacademy.com		1	5/25/2015
Test	Quella	TestQuella	brita@gembaacademy.com	02/20/2020	55	3/23/2020

Learner Report Card

Customize Layout | All Users | Report List | Expand
Create New Bookmark
Manage Bookmarks
Change Theme

User: demomanager (Joe Demo)

Total Credit Hours: 0.00

Filter(s): Select Filter(s) Go

Date Range Criteria: No Date Filter

Page 1 of 3

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 in the Factory and the Warehouse	✗	2/12/2020			✓	
GA Lean > 5S in the Office	✗	9/11/2019			✓	04/01/2020 01:53 PM
GA Lean > 5S Workplace Productivity	✓	2/19/2015	4/8/2016	100.00	✓	02/07/2020 09:02 AM
GA Lean > A3 Thinking	✗	1/29/2016			✓	

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

Customize Layout | Report List | Expand
Create New Bookmark
Manage Bookmarks
Change Theme

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	667	04/06/2020 15:42:50	02/19/2015 12:56:43	5 Minutes 27 Seconds	37 Days 11 Hours 32 Minutes 11 Seconds
Test	Quella	TestQuella	Gemba Academy Company, Demo Company, Demo Company - Arizona Site, GATest	50	03/23/2020 08:40:33	05/24/2017 13:23:04	29 Minutes 26 Seconds	1 Days 8 Hours 45 Minutes 33 Seconds

Managers Guide

GEMBA ACADEMY Learning System

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 the report format, email address to send it to, and schedule.

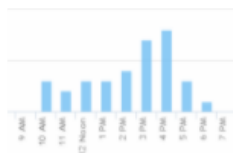


Reports Dashboard

1. **Reports Dashboard:** You will click the Dashboard within the Reports tab to access various editable visual reports. Click Add button to choose the reports you would like.

Add Panels

Find Sort By



Site Activity
Hourly trends in user logins to the site.

Add



People's Activity
Summary of people's activity in the last few days.

Add



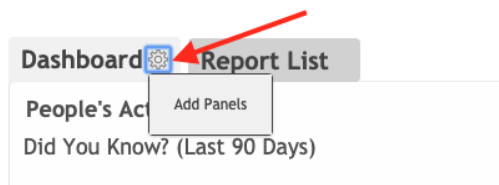
User Inactivity
Displays the number and percentage of active and inactive users.

Add

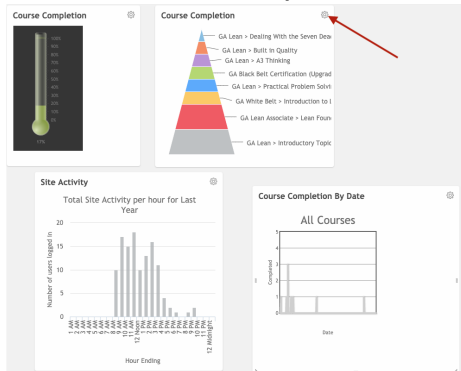
2. Add your reports to your dashboard by choosing Expand and the gear symbol then add the report graphs you like.

Managers Guide

GEMBA ACADEMY Learning System



3. To customize this report choose the gear symbol with the graph box.



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

Manager Dashboard

The Manager Dashboard has convenient shortcuts to the functions to your User Groups and Learning Paths.

