Manager Toolkit

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When staff select you as their manager, additional features in iLearnOregon become available to you. You will receive notices when staff register for training. You can also review their transcript and required training status. This toolkit guides you through these features.

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Manager Area – Team

iLearn provides managers with tools in the Team menu. Access is automatic when a staff member assigns you as their manager in Workday, or when HR makes the assignment for them. If you don’t see this menu, or if a staff member’s name is missing from your Team list, advise your staff to update their manager in Workday.

Reminder: The manager field in Workday is integrated with iLearn. Ensure your staff lists you as their manager in Workday.

Click on Team. A list of users who have selected you as their manager is listed here.

Expand each staff member’s information by clicking the plus sign. Note: From this screen, you can quickly identify overdue or incomplete trainings, as well as whether the staff member has met current certification requirements.
1. **Staff email address** – Email addresses are automatically updated from the Outlook address book into iLearn.

2. **Direct email link** – Note that you can email your staff member directly from iLearn.

3. **Staff Login ID** – In the event your staff forgets their login ID, you can find it for them here. If they forget their password, however, they must call the Service Desk.
   **TIP:** Advise staff to complete security questions so they can receive a temporary password in the event they forget theirs.

4. **Assigned Training** – When the agency or program area assigns a required training to staff it will appear here.

5. **View Transcript** – See what courses your staff has taken, and when they were taken.

6. **Last login date and time** – See the last time your staff member accessed iLearn.
Staff who no longer report to you

- If staff listed in Team no longer report to you, please advise them to update the manager field in Workday.
- If they left state service, please contact Workday to ensure your name was removed as the staff’s manager. If the staff member continues to appear on your iLearn Team list, please email dhs.training@state.or.us

Manager Area – Reports

On the Team menu, click the Reports tab to see reports available only to managers.

Data Dashboards

iLearn has the ability for training to be assigned and required. If your program area assigns program-specific training, explore the Data Dashboards by clicking the Open buttons in the Action column.

For help using this feature, open one of the Data Dashboards and click the Help (question mark) button by your initials at the top of the page.

The Help page will open in a new window.
Detailed Reports

Pull reports for staff you directly manage. Click the **report title** for information about the report, to select parameters (criteria) for the report, or to schedule a regular report. **NOTE:** You can simply click Run Report by the report title without setting parameters or a schedule first.

Reports include:

1. Manager’s Report – Content Access
2. Manager’s Report – Required Training
3. Manager’s Report – Required Training Exemptions
4. Manager’s Report – Training Progress

**Detailed Reports – Select Criteria**

Each report has parameters (criteria) you can use to run the report. To access these criteria:

1. Click the report title.
2. On the report screen, click **Select Criteria**.
3. In the popup window, select the filters you want. At the bottom of the window, click **Run Report**.
Detailed Reports – Schedule Report

You can set a schedule to automatically generate a report. To do this:

1. Click the report title.
3. In the popup window, select the criteria you want.
4. Be sure to click the radio button by Fixed Start Date and choose a date, since this is a required field. At the bottom of the window, click Continue.
5. In the New Report window, you’ll be guided through setting information a regularly-scheduled Report.