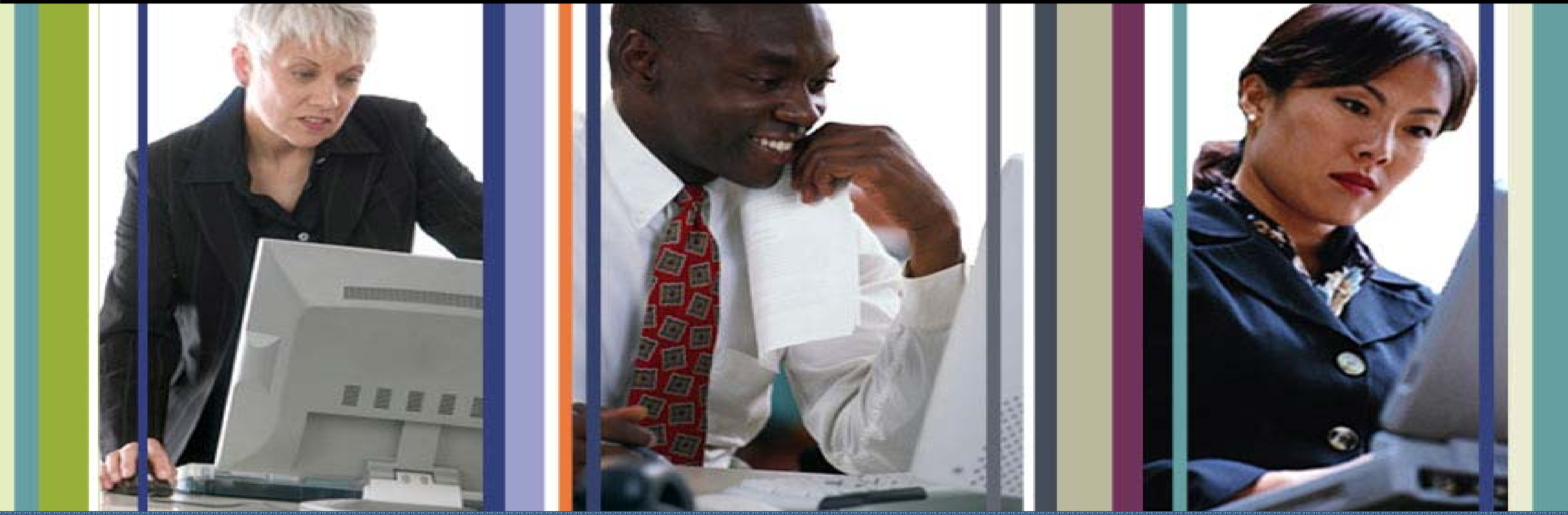
DAS
DEPARTMENT OF ADMINISTRATIVE SERVICES
HUMAN RESOURCE SERVICES DIVISION

iLearnOregon User Functions



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Module Information

Module Name:	USER FUNCTIONS
Module Topics:	This module will cover the following topics: 1. Navigating iLearnOregon 2. Reports 3. Tools for Managers
Module Objectives:	Upon completion of this module, users will be able to properly access iLearnOregon.
Module Introduction:	This module is designed to introduce a user of iLearnOregon to the layout and basic functions of the system. The learner will be able to log into the system, navigate the site, and understand the main areas of the site. This module also covers tools that managers will have access to for managing their employees training.
Module Duration:	60 minutes
Instructor Notes:	

Lesson Information

Lesson Name:	LESSON 1: NAVIGATING ILEARNOREGON
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Access the main login page; • Create a new account; • Navigate the site; • Update their user profile and password; • View My Homepage; • Access My Workspace; • Access the Learning Center; • View Reference Materials; and • Access Collaboration Tools.
Lesson Introduction:	The content in this lesson will assist the user in navigating iLearnOregon, from logging in to identifying icons through traveling around the site. The learner will become familiar with how to move around within iLearnOregon to access personal and work related information.
Lesson Duration:	35 minutes
Instructor Notes:	**Location**: Main Login page. **Permission Level**: Requires membership in the Everyone role.

1.1 LOGIN PAGE

Each time you access iLearnOregon you are prompted to provide a login ID and password that you determine at registration on your first visit to the site. During registration, you also create your user profile that is used for tracking your learning and knowledge sharing activities. The profile you create is used to control and adapt your experience at the site. This includes access rights as well as tracking accomplishments.

1.1.1 LOGIN TOOLBAR

The bottom of the page is the Login Toolbar. There are 5 links:

- *Create New Account*: The Create New Account Link allows a person to create an account in order to access the site. Once a user creates an account, they will receive an email indicating that they have registered to the site.
- *Forgot Login*: The Login Help link allows users to obtain their login ID. Users will enter their last name and email address currently associated with the account. The user will receive an email with the user's login ID.
- *Forgot Password*: The Password Help link allows users to obtain a temporary password in order to login. Users will enter their login ID and email address currently associated with the account. Passwords are encrypted so all new password requests will generate a new system password. Upon logging into the system after requesting a password, the user will be prompted to create a new permanent password.
- *Email DAS Support:* The Email Support function should be used when a user has trouble with the system or finds a problem within the site. The email will go to the DAS support desk.
- *iLearn Help Resources:* The iLearn Help function takes you to DAS HRSD iLearnOregon page which is full of resources that can help with many questions.

1.1.2 CREATE A NEW ACCOUNT

As a new user to iLearnOregon, you will need to create a new account in order to access the site. If you were working for the Oregon Military Department as of 11/19/08 then your account has already been created. Use your State OR # as your login ID and Password.

To create a new account:

1. On the login page click on "Create a New Account".
2. Select the appropriate radio button next to one of the following types:
    - *State Employee:* Select this type if you are a current employee of the state of Oregon and have a valid state issued email address (i.e. jane.doe@state.or.us). Proceed to step 3.
    - *State Employee with Non-state Email*: Select this type if you are a current employee of the state of Oregon and either don't have a valid state issued email address or would like to use an alternative email address. Proceed to step 3.
    - *Not a State Employee*: Select this type if you are **not** an employee of the state of Oregon. Proceed to step 4.

User Information Form for State Employees:

3. Complete the User Information Form for State Employees by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

*Last Name	Enter your first name as displayed on your paycheck stub.
*First Name	Enter your last name as displayed on your paycheck stub.
Middle Name/Initial	Enter your middle name or initial.
*Employee ID	Enter your employee identification number (EIN) as displayed on your paycheck stub (i.e. OR234567). If you do not know your EIN, leave the field blank and select the Find It button. If the system locates your EIN then it will automatically populate the Employee ID and the Email Address fields. If the system cannot locate your EIN you will receive an error message. Check to make sure that your first name and last name are entered exactly how they are on your paycheck stub.
Email Address	Enter an address that you want your password and training information sent to.
*Login ID	Enter text for your Login ID. Your login must contain at least four letters or numbers and cannot contain characters such as /, @, or &..
Language	This will automatically default to English.
Region	This will automatically default to English (United States).
Time Zone	This will automatically default to Pacific Time.

User Information Form for Non-state Employees:

4. Complete the User Information Form for Non-state Employees by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

*Last Name	Enter your first name.
*First Name	Enter your last name.
Middle Name/Initial	Enter your middle name or initial.
Email Address	Enter an address that you want your password and training information sent to.
*Login ID	Enter text for your Login ID. Your login must contain at least four letters or numbers and cannot contain characters such as /, @, or &.
Language	This will automatically default to English.
Region	This will automatically default to English (United States).
Time Zone	This will automatically default to Pacific Time.

5. Click Next. The Job Title page displays.
6. From the drop-down list select the job title that best describes your current position.
7. Click Next.
8. The Organization page displays.
9. Select an organization within Military Department, State of Oregon. Select the one that is the closest to what unit/section you work in.
10. Click Next. The Manager page displays.
11. From the drop-down list select your manager.
12. Click the Finish button and the system will create your profile and you will receive an email with your temporary password.

1.2 BASIC SITE NAVIGATION

1.2.1 SITE TOOLBAR & MENU

The Site Toolbar is the area on the left side of the page. The items listed in this area are on every page within the system to allow users to easily access areas within the site.

The Site menu is the portion of the Site Toolbar that contains the panes which indicate the five main areas of the site.

Click the name of a pane to display the groups within it. Some groups contain additional items as indicated by the plus "+" sign to the left of the group's name.

Click the plus "+" sign to expand the group and access other items.

1.2.2 TOP TOOLBAR

- *Site Search*: Use the Site Search at the top of any page to quickly find items in the site. All content and courses can be found by entering keywords or phrases in the Site Search field and clicking Go. Note: You can also use the site search to find users.

- *Site Map*: Click this link at the top of any page to see a text-based outline of the site's contents. Click the links on this page to quickly access an area within the site.

- *Logout*: This link takes you back to the login page, thereby closing your current session in the system and allowing you to start a new session.

- *Site Help*: Click this link at the top of any page to access the Site Help window. In addition to helpful features such as the Index tab, Site Help also has browse sequences to help you learn how to use and navigate areas in the system. Browse sequences take you through a set of steps for a function; it gives you an overview of how to use a function. If a function has a browse sequence, the left and right arrows above the menu in the Site Help window are enabled (indicated by the right arrow turning light blue).

- *Help Icon*: The question mark with a circle around it is the page-level Help icon, and it is located in the same place on every page in the site. Click this icon to access page-level Help. Every page in the system (with the exception of pop-up windows) has a Help icon in the upper-right corner of the page. This icon allows you to access the Help page specifically for the page that you are currently viewing.

- *Bread Crumb*: To help you understand where you are in the system, there is a breadcrumb trail to indicate your current location in the site. There is also heading text (general information about the area you are in) and instruction text (specific information about what to do on the tab) on each page in the system.

- *Refresh Icon*: A page refresh icon is located in the top right corner for My Homepage, My Learning Plan, and My Transcript.

1.3 MY WORKSPACE

My Workspace is where you quickly access your account, transcript, calendar, and other items. The following functions are available from My Workspace:

My Homepage	Quickly access content that is relevant to you, and recently added content.
My Learning Plan	View all current training activities in which you are participating or are required to complete.
My Transcript	This area contains your transcript which indicates courses you are enrolled in, currently taking, or have completed, in addition to other information.
My Calendar	A calendar containing user-added events and information (e.g., meetings to attend, courses you are taking).
My Shortcuts	Provides access to user-selected content items and information about each content item such as editing status and rating.
My Contacts	Allows you to email user-selected contacts (individual people) and Distribution Lists (groups of people).
My Functions	A user-selected list of site functions (links that provide instant access to site functions).
My Account	Change the ID you use to log into the site, change the password you use to log into the site and make changes to the information in your profile.
My Domains	View domains of which you are a member, and select one domain to be your primary domain.
My Dashboard	View a collection of small reports, specific to a user role (managers, administrators, report managers, and organization managers). You choose the reports that display on your dashboard.

1.3.1 MY HOMEPAGE

My Homepage is the first page you see after you log into the system using the Login page. My Homepage is divided into panes. Each pane is related to a larger function within the site, and the heading for each pane is a link to directly access the function. Within each pane there are up to five records displayed that are associated with that function (*Note:* "No records found" is displayed when nothing has been assigned to you and/or you have not added any content for yourself). The first time you log in, this page may not contain much information in the tables. To access the items available you can either click on the title of the item or click the “More” link.

You may change the layout of the panes on the "My Homepage" page using the "Edit Homepage" link. By default, all panes are displayed in two columns, but you may choose to remove panes, have 1-4 columns of panes, and decide the order of the panes for each column.

Below are explanations for each of the panes that are available on this page.

Announcements	Displays the five most recently added announcements for which you have View permission.
Blogs	Displays the five blogs you have accessed most recently.
Collaboration Spaces	Displays the five collaboration spaces you have most recently accessed. If you have not joined any spaces, a message displays indicating this. If the title is not a link, then you may need an authorized user to give you the appropriate permission to access the collaboration space.
Curriculums	Displays the five curriculums in which you have most recently enrolled that are not completed.
Distribution Lists	Displays the five distribution lists most recently added by you.
Documents	Displays the five documents you have most recently accessed.
Contacts	Displays the five contacts most recently added by you. Click the name of the contact to view information about them. If a user you recently added becomes inactive, they will no longer display in this area.
Functions	Displays the first five functions listed on your "My Functions" page.
Shortcuts	Displays the five shortcuts most recently added by you.
Online Courses	Displays the five online courses in which you have most recently enrolled that are not completed. The date is the last time you accessed the online course.
Required Training	Displays the five most recently assigned content items that you have not completed. Also displayed are your status for the content and the type of content. Click the title of the item to open it (if the title is a link). Note: Once given a required training assignment, you interact with the content item as you would from any search in the system. You are not automatically enrolled in courses or automatically made a member of a collaboration space.
Scheduled Training	Displays the five current classroom course sections in which you are enrolled. The dates and times indicate when the course section meets.

1.3.2 MY LEARNING PLAN

My Learning Plan is where you view all current training activities in which you are participating or are required to complete. The activities are separated into four areas:

- *Required Training*: All content that has been assigned to you as required training is displayed in this area. If the content is not a classroom course and/or does not require access approval, you may open the course window from this page. When you complete a training activity the content item is removed from the Required Training area, the system sends an email to you confirming your completion of the content item, and the progress status on your transcript is updated to indicate that you completed the item.

- *Scheduled Training*: All classroom course sections in which you are enrolled or waitlisted are displayed in this area. If you are waitlisted in more than one section for the same course, then each section is displayed separately. For each course section, you may cancel your enrollment or waitlist status and view additional sections of the course, with the ability to enroll or waitlist in other sections. You may also access the collaboration space for the section (if one exists). Only current sections (sections for which the end date has not passed) appear in this area. Courses are removed from this area once the section end date has passed, regardless of whether you have obtained completion status for the course/section.
- *Online Courses*: All of the SCORM 1.2 and SCORM 2004 courses in which you are enrolled are displayed in this area (does not include tests). You may access the courses by clicking the title (unless it is under revision), view progress information for the course and save or remove the course in your shortcuts. Once you complete an online course, it is removed from this area.
- *Curriculums*: All curriculums in which you are currently enrolled are displayed in this area. It does not include the individual courses or content contained within the curriculum. You may launch any curriculum for which you have access by clicking the title of the curriculum (unless it is under revision), view progress information for the curriculum, and save or remove the curriculum in your shortcuts. Once you complete a curriculum, it is removed from this area.

1.3.3 MY TRANSCRIPT

Transcript is a list of all the content items that you have started or completed. It also lists your training assignments. The Page menu allows you to add personal learning events, which are educational activities such as a college course, seminar or conference that occurred outside the site that you want added to your transcript.

You may view information about the courses in which you are enrolled, view your progress and performance for a course, take a survey, view your certificates and personal learning events, and perform other actions. You may also start a course by clicking the title of the course.

- *Certifications*: Is a list of your certifications. You may be able to add, edit and delete certifications. Authorized users may also manage the certifications of a user.
- *Training Assignments*: Is a list of your required training assignments.

The Transcript page only includes the most recent attempt on a content item. Once you begin a new attempt on a content item, the record of all previous attempts is available from the All Attempts page (accessible from the Action menu). If you complete a curriculum and then access a training activity from the completed curriculum again, you will be starting a new, separate attempt at completing the curriculum. In order to complete the new attempt, you must complete all of the appropriate training activities again.

1.3.5 MY CALENDAR

My Calendar is where you may add, edit, and delete your appointments, meetings, and other events you want to keep track of. Each item you add is considered an event. When you enroll in a course section, this information is automatically added to your calendar (this type of information cannot be edited). By default, the monthly view of the calendar is displayed. Click a date to see the daily view. Click the plus sign in the monthly view to add events for specific days.

For each day, all day events are displayed first, then the events for the rest of the day are displayed in chronological order. If there are events that start at the same time, then the one that ends first is displayed first. If there are events that both start and end at the same time, then the events are listed in alphabetical order according to the event title.

Use the arrows at the top of the tab to navigate between the previous year, previous month, next month and next year.

1.3.6 MY SHORTCUTS

Shortcuts contain a list of links to content and information about content such as the Editing Status and Rating. The content is displayed in alphabetical order according to title. The Action menus for content are specific to each piece of content, according to your permissions and attributes of the content.

Shortcuts are added to or removed from this list when you choose "Save Shortcut" or "Remove Shortcut" from the Action menu in search results anywhere in the system. For example, after performing a search in Documents and you find the document you want, you would choose "Save Shortcut" from the Action menu to the right of the Title of the desired document and click Go. This saves a direct link (and related information) to the document on your Shortcuts page.

Content on your Shortcuts page is the same as content when it is displayed in search results anywhere in the system. If content is deleted from the system, it is automatically deleted from your Shortcuts page. Inactive content does not display on your Shortcuts page. If your permission for a piece of content changes so that you no longer have access to it, then the content no longer displays on your Shortcuts page.

1.3.7 MY CONTACTS

My Contacts is where you may quickly access users or groups of users. My Contacts contains two areas: Contacts and Distribution Lists. Contacts is a list of individual users and Distribution Lists are groups of users.

Contacts that you add are displayed in alphabetical order by last name. Only active users are displayed, which means that if a user becomes inactive, they are automatically not going to display in your Contacts list.

You create distribution lists using the Create Distribution List option in the Page menu. The distribution lists are displayed in alphanumeric order by title. If a user becomes inactive, they are automatically not going to display as a member of your distribution list.

1.3.8 MY FUNCTIONS

My Functions provides instant access to site functions. If you have not selected any functions yet, this tab is blank. After you select functions, links to them are displayed on this tab. You may also use the Order column to change the order in which the links to the functions are displayed on this tab. When you click a link from this tab, you are immediately taken to the function without having to use menus or links in other locations.

1.3.9 MY ACCOUNT

To update your account information you have the following options available under My Account:

- *Edit Login ID*: Your login ID is a code you use to identify yourself when you log into the system. Combined with your password, it is used by the system to uniquely identify you.
- *Edit Password*: Your Password is a secret word or code that is associated with your login ID. Together, these items uniquely identify you and let the system know who you are.
- *Edit Profile*: When you want to edit your profile you will have 6 tabs that you can edit – contact, manager, organization, job title, professional, and preferences. The following provides information on how to edit all of those tabs. You can change the information in your profile at any time.

To change your Login ID:

1. From My Workspace go to My Account and expand the tree view.
2. Select Edit Login ID and you will be taken to the Login ID page.
3. Type the login ID you currently use in the "Current Login ID" field.
4. Type the new login ID you want to use in the "New Login ID" field. The following special characters can be used: @, #, [, ^, $, ., |, ?, *, +, (,),], {, }, and \.
5. Click Save.

The next time you log into the system, remember to use your new login ID.

To change your password:

1. From My Workspace go to My Account and expand the tree view.
2. Select Edit Password and you will be taken to the Edit Password page.
3. Type the password you currently use in the "Current Password" field.
4. Type the new password you want to use in the "New Password" field. The following special characters can be used: @, #, [, ^, $, ., |, ?, *, +, (,),], {, }, and \.
5. Type the new password again in the "Confirm New Password" field, exactly as you typed it in the "New Password" field.
6. Click Save.

The next time you log into the system, remember to use your new password.

To update your profile:

1. From My Workspace go to My Account and expand the tree view.
2. Select Edit Profile and you will be taken to the Edit Profile page.
3. Change your information in the required and non-required fields.

If you need more information refer back to section 1.1.2.

1.3.10 MY DOMAINS

My Domains is where users can access a list of all domains to which they currently have memberships. When users access available domains, they are automatically logged out of the current domain and logged into the selected domain. The menu structure, available functions, interface, and some business rules may vary between domains.

1.4 LEARNING CENTER

The Learning Center is where users find courses, curriculums, training facilities, course surveys, and tests. Authorized and general users have access to all elements contained within the Learning Center. Only authorized users can create, edit, and manage Learning Center content.

- *Course Catalog:* Use the Course Catalog to find classroom courses, online courses, and curriculums in which you may enroll. You may search for courses/curriculums, view information about them and enroll in them. Depending on your profile and your permissions on the content in the course catalog, when you search for courses/curriculums, you will only see those that are available to you. Depending on the configuration of the system, you may need to enroll in an online course/curriculum before the system will allow you to access it.

  If the course is an online course, you take the course by clicking the title of the course (which opens a window) and uses the navigation buttons to navigate through the course.

  The search results data grid will show the editing status for each course. "Available" (green checkmark) means the course/curriculum is available for viewing, and you may select an option from the Action menu and click Go. "Under Revision" (red circle with white dash) means a user is editing the course/curriculum and it cannot be viewed. The course/curriculum cannot be accessed or rated unless the editing status is "Available."

- *Tests:* Tests is where you search for and take tests. If a test is not available, the user must select the "Request Access" Action menu option to submit an access approval request. The user will be notified via email of the status of the request. Other actions such as Rate and Request/Cancel Access are also available.

- *Training Facilities:* Training Facilities is where you locate facilities in which instructor-led courses and other events take place. Training Facilities also contain information about physical locations such as hotels. You may search for facilities and view information about them; get maps and directions to facilities, view rooms within the facilities and information about the rooms, and rate facilities and rooms.

1.5 REFERENCE CENTER

The Reference Center is where announcements, miscellaneous documents, frequently asked questions (FAQ), and site surveys are located.

- *Announcements*: Announcements are information or important communications intended for all users. Announcements are listed in descending order with the most recently posted announcement first. Announcements in this area are separate from Announcements within collaboration spaces.

  Some examples of announcements are:
  - Upcoming meetings and events (or changes to them).
  - Notification of new courses, content, or features in the system.

- *Documents*: Documents are files (e.g. PDF files, Microsoft® Word® files, etc.) that can be uploaded to the system or referenced from a remote location with a URL. Documents are shared files that can be viewed by users of the system. If you only want a particular user or group of users to view the document, then use access approval to ensure that only approved users may view the document.

- *FAQs*: Frequently Asked Questions (FAQs) are commonly asked questions containing answers and the source of the answer. FAQs are posted so that everyone may benefit from having access to information that others have found and entered into the system.

- *Glossary*: The Glossary contains terms, definitions for terms, and related terms that are used within the system. The Glossary is used to display curriculum-specific terms and system-wide terms. If you access the Glossary from the Reference Center, you are accessing the Glossary for the entire system. If you access the Glossary by clicking the "Glossary" link on the Curriculum page, then you will only be able to view terms that are specifically related to the curriculum.

- *Surveys*: Surveys are collections of questions used to gather feedback and opinions about a specified topic. The feedback is then tallied and analyzed. Surveys within the Reference Center are general surveys (i.e. not related to content, including courses).

1.6 COLLABORATION CENTER

The Collaboration Center contains blogs, user and instructor directories, and collaboration spaces. There are three types of collaboration spaces that allow you and other users to share knowledge on a specific topic.

- *Blogs*: A blog (short for "weblog") is a shared online journal where people can add information in the form of posts and comments that are related to the topic of the blog. The topic of each blog should typically be indicated by the title.
  Blogs in the collaboration center are separate from blogs within collaboration spaces. If you are looking for a blog that is within a collaboration space, you must access the specific collaboration space and then perform a search to find the blog.
  Only authorized users may create, edit, and delete blogs in the collaboration area. Users may add posts and comments to blogs unless an authorized user has assigned a specific group of users to the blog.
  Your first and last name is used to track the creation and revision of blogs, posts, and comments.
  When an authorized user deletes a blog, it is no longer linked to any of the categories in the system. All posts, comments, ratings, reviews, and other related information are deleted from the system.

- *Collaboration Spaces*: A collaboration space is a focused community where you share documents and knowledge with other users. The Collaboration Space feature is where you find existing collaboration spaces or create new ones. If you create a collaboration space, you automatically become the manager of it. There are three types of collaboration spaces: private, public, and moderated. Users may join, leave, manage, rate, search for or view information about collaboration spaces based on the role they have been assigned to within the space.
  Some collaboration spaces are automatically created by the system when an authorized user selects the collaboration space option when creating a classroom course section.

- *User Directory*: The User Directory allows you to find other active users of the site. Everyone who has a profile within the system is considered a user. Only users who choose to display contact information (an option on the Preferences tab of Edit Profile) can be found using the Directory.

- *Instructor Directory*: The Instructor Directory allows you to find instructors, manage and delete them, and view information about them. After finding instructors, you may click the Information icon to view their experience, contributions to the site, preferences, contact, and professional information. Certain information in this window may or may not be visible based on your permissions and the instructor's preferences.

1.7 ADMINISTRATION

The Administration area is where you access reports and view information about the system. Authorized users also manage content, courseware, roles, users, view general and user-specific reports, and perform other actions in this area.

General users will only have access to the following functions within the Administration area:

- *Reports Console*: For a user who only has the everyone role they will have access to the following reports:
  - *Course and Content Ratings*: This report allows users to view courses and content items by rating. Courses and content are filtered according to your permissions on the course/content item. You can only see courses in the results that you have permission to view, launch or manage.
  - *My Required Training*: This report enables the user to view progress against all training that has been assigned to them. All courses/content to which a user has been assigned are displayed in the report, regardless of activity or permissions.
  - *My Content Access*: This report provides the user with a record of all the courses and content items they have accessed and how many times it was accessed. All courses/content to which a user has been assigned or completed are displayed in the report, regardless of activity or permissions.
  - *My Training Progress*: This report shows the user's performance on online courses, classroom courses, curriculums, tests, and training assignments. This report also details course progress information for the currently logged in user; all courses that the user has enrolled, started, or completed.

Lesson Information

Lesson Name:	LESSON 2: REPORTS
Lesson Objectives:	Upon completion of this lesson, the learner will be able to run a report.
Lesson Introduction:	General users only have access to four different reports. These reports only provide information about the user.
Lesson Duration:	10 minutes
Instructor Notes:	**Location**: Main Login page. **Permission Level**: Requires membership in the Everyone role.

2.1 RUNNING A REPORT

Reports enable a user to get data out of the system. Everyone has access to the following reports:

- Course and Content Ratings
- My Required Training
- My Content Access
- My Training Progress

To run a report:

1. Click Administration.
2. Click Reports Console.
3. From the Reports Console page type keywords in the Search Text field. Select items from other search criteria options to refine the results and then click Search.
4. Find the report you would like to run and click on Select in the Action menu.
5. Click Go to access the Run Report page.
6. Enter your filter selections using the fields, menus and checkboxes that are available.
7. Click Run Report. The report displays in a new window.
8. At this point you have several options. The following options are available for every report.
   - Print
   - Export to Excel
   - Export to PDF
   - Export to XML

Lesson Information

Lesson Name:	LESSON 3: TOOLS FOR MANAGERS
Lesson Objectives:	After completion of this lesson, students will be able to access information about their employees learning and development progress.
Lesson Introduction:	When a user identifies a manager within their profile, the manager has access to additional functions within the site to find out information about their employees.
Lesson Duration:	15 minutes
Instructor Notes:	Location: My Workspace page. Permission Level: Requires membership in the Manager role. This lesson only needs to be covered for people who have employees that they manage.

3.1 DASHBOARD

My Dashboard is where you view a collection of small reports, specific to a user role. Each report is displayed in a panel. You control what panels appear on the dashboard and their location (by dragging and dropping them in a new location). The reports that are available in your dashboard are based on the system's configuration, your permissions and the roles to which you belong.

Some dashboard panes contain reports with additional details. To get to these details, you click the dashboard chart, and the details display in the same window.

A manager has the following panels available in their dashboard:

- *Anniversary Watch*: Displays the number of days until your anniversary date with the company/organization.

- *Training Assignments (Employee)*: Indicates the status of training assignments for the manager's direct reports. For this report you may change the date range by clicking Edit in the upper-right area of the panel. The default date range for this report is the past nine months including today. What to include in results: Only users that have selected the logged in user as their manager. All training assignments assigned to these users within or including the selected date range are represented in the report. If no training assignments have been made for any of the logged-in user's employees, the speedometer does not display. A manager's assigned training detail report is accessible from this report.

- *Web Link*s: A list of pre-determined links that cannot be edited in the report.

3.2 REPORTS AVAILABLE TO MANAGERS

A manager will have access reports that pertain to their employees.

- *Manager's Report – Required Training*: This report enables a managers to view training assignments for direct reports and see progress against those assignments. A manager can view training assignments for all direct reports, filtering by user activity, progress status, content type and assignment date range. Only the users directly managed by the authorized user display in the report results. All courses/content for which a user has progress data are displayed, regardless of activity or permissions.

- *Manager's Report - Content Access*: A manager can view content access of all direct reports, filtering by user activity, date range and content type. The user must be a manager of one or more users to access the report. Only users directly managed by the authorized user display in the report details.

The content access report enables the user to see information about when they launched and completed a content item and how many times it was accessed. All courses/content for which a user has progress data are displayed in the report, regardless of activity or permissions. This report is the same as My Content Access, except multiple users are displayed in the report.

- *Manager's Report - Training Progress*: This report enables managers to view course, test, curriculum, and training assignment progress. A manager can view course progress made by all direct reports, filtering by user activity, training type, date range and progress status. The report returns active courses only.

3.3 MANAGING EMPLOYEE INFORMATION

Under Manage Users, a manager can search for their employees and then use the action menu to perform actions for each employee. Search results are limited to the active users that are currently managed by the manager.

Managers can perform the following actions for their employees:

Edit Peers	View existing peers of the user, and add or remove peers.
Manage Personal Learning Events	Create and manage educational activities for a user such as a seminar or conference that occurred outside the site. Learning events are added to the user's transcript.
Send Email	Send an email to the user.
Send Skills Surveys	Send skills surveys to colleagues, the user and their manager.
View Archived Evaluations	View all past performance evaluations the user has completed and all of the evaluations completed by their manager(s).
View Archived IDPs	View the user's archived IDPs. Archived IDPs cannot be changed, only viewed.
View Archived Skills Surveys	View surveys that were previously sent out and responded to by the intended recipients for the user.
View Current IDP	View the user's current IDP, which consists of their core IDP and their local IDP. You may also manage their local IDP.
View Transcript	Access the user's transcript, which indicates courses they are enrolled in, currently taking or have completed, in addition to other information.