

Managing your team in iLearn

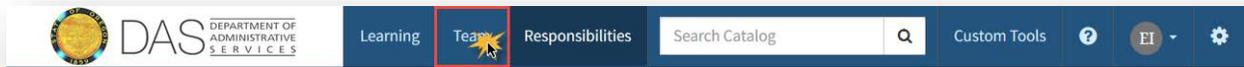
iLearnOregon is a role-based system. Depending on your role, you may have any number of specific permissions to perform functions within the system. A manager is an **automatic role**. Accounts are automatically added to this role when they are specified as a manager of another account/learner. They are automatically removed from this role when they are removed as a manager from all accounts/learners. Once you are designated as a manager, the "**Team**" area displays.

This job aid will show you the functions that are available to managers for your direct and indirect employees:

Table of Contents

View Your Team.....	2
Reports	3
Data Dashboards	3
Detailed Reports.....	4
Transcript Report	6
Assigning Required Training	8

Managing your team in iLearn



On the top menu bar, *Click Team.*

View Your Team

From the **Team** tab can view training information about your direct and indirect reports.

- The Status column contains icons that indicate whether users are current with their training requirements, or if there is a problem.

User Name	Status
Kim Courtright	1 Overdue or Incomplete Required Training User's certification requirements are all current
Pamela Davis	User's certification requirements are all current
Roger Dosier	1 Overdue or Incomplete Required Training User's certification requirements are all current
Twyla Lawson Team	1 Overdue or Incomplete Required Training User's certification requirements are all current

To view detailed information for each user, *click +* .

About	Status	Quick Links
Email Address: kim.courtright@oregon.gov	Pending Requests: 0	Email User
Work Phone:	Assigned Training: 1	View Transcript
Location: Salem	Last Login Date and Time: 2/23/2016 4:24 PM	
Roles: N/A		
Login ID: [REDACTED]		
User ID: [REDACTED]		
Organizations: HRIS Project - 305		
Managers: Joyce Martinez		
Job Titles: Temporary Employee - T0001 (Primary)		

- View employee account information
- Status
 - Number of assigned trainings
 - Last login date and time
- Quick Links
 - View Transcript (for the official training record use the [Transcript Report](#))

Managing your team in iLearn

Reports

From the **Reports** tab you can view data and pull reports for your employees by using the Data Dashboards and Detailed Reports

Data Dashboards

- Certifications Dashboard
 - The Certifications Dashboard allows you to view summary information about certification progress for your team.
- Custom Dashboard
 - Use your custom dashboard for data you frequently review. When you run a detailed report, the items you create (e.g., tables, charts, etc.) can be added as panels for your custom dashboard.
- Employee Training Dashboard
 - The Employee Training Dashboard allows you to view training assignment information for both your direct and indirect employees

The screenshot shows the iLearn Oregon interface. At the top, there is a navigation bar with the DAS logo and the text 'DEPARTMENT OF ADMINISTRATIVE SERVICES'. The navigation menu includes 'Learning', 'Team', and 'Responsibilities'. A search bar is labeled 'Search Catalog'. On the right, there are links for 'Custom Tools', a help icon, and a user profile icon 'JM'. Below the navigation bar, the 'Reports' tab is selected. The main content area is titled 'Data Dashboards' and includes a sub-header 'Data Dashboards' and a descriptive paragraph: 'Use the buttons to open a data dashboard. Your custom dashboard may include the tables, charts, and crosstabs you create after running a report.' Below this is a table with three columns: 'Title', 'Type', and 'Action'. The table lists three dashboards: 'Certifications Dashboard' (Standard type, Open button), 'Custom Dashboard' (Custom type, Open button), and 'Employee Training Dashboard' (Standard type, Open button). Below the 'Data Dashboards' section is the 'Detailed Reports' section, which includes a sub-header 'Detailed Reports' and a descriptive paragraph: 'Select the title of a report to access its details page and view available options, or select the Run Report button.' Below this is another table with three columns: 'Title', 'Type', and 'Action'. The table lists three reports: 'Manager's Report - Content Access' (Standard type, Run Report button), 'Manager's Report - External Learning' (Standard type, Run Report button), and 'Manager's Report - Purchases' (Standard type, Run Report button).

Title	Type	Action
Certifications Dashboard	Standard	Open
Custom Dashboard	Custom	Open
Employee Training Dashboard	Standard	Open

Title	Type	Action
Manager's Report - Content Access View information about content items that users accessed, including completion information for users...	Standard	Run Report
Manager's Report - External Learning View external learning information for users whom you directly manage.	Standard	Run Report
Manager's Report - Purchases View a list of users whom you directly manage, and the purchases that each user made. Purchase histo...	Standard	Run Report

Managing your team in iLearn

Employee Training Dashboard

View training assignment information for your employees (listed in the table further below). Use the Edit Filter area to filter your employees, and the "Drill-down" link to view information about the employees of your employees. Click the chart to view details about assignments.

Edit Filter

Show training assignments due no later than:

Include training assignments with no due dates

Include indirect employees

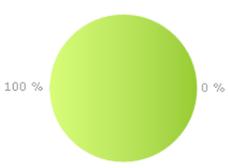
Show chart values as:

Percentage

Number of Training Assignments

Search

Employee Training by Completion Status



Name	Title	Assignment Date	Period Due Date
+ Status: Incomplete			

Now viewing:

Employees of Twyla Lawson

Detailed Reports

Detailed Reports

Select the title of a report to access its details page and view available options, or select the Run Report button.

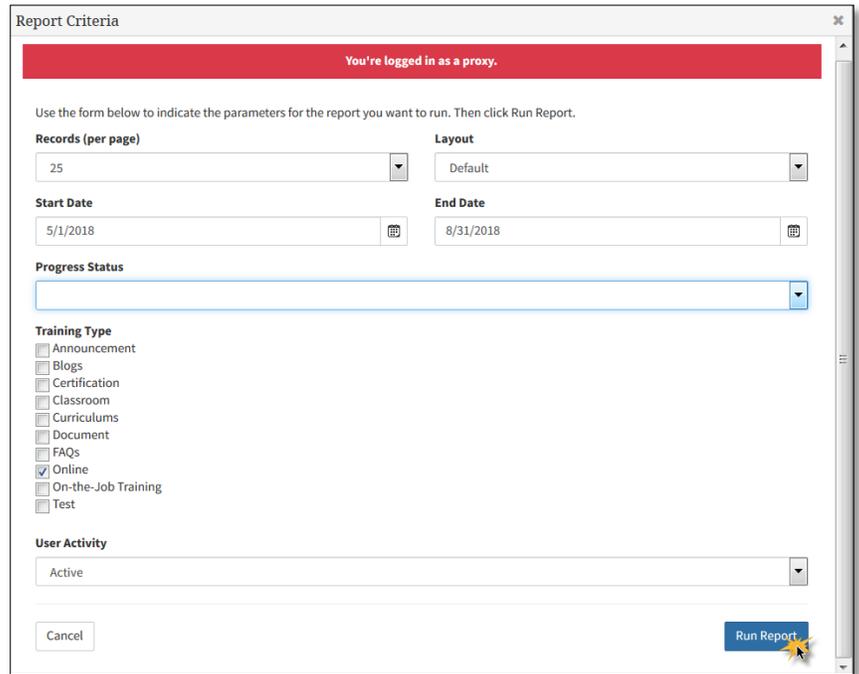
Title	Type	Action
Manager's Report - Content Access View information about content items that users accessed, including completion information for users...	Standard	Run Report
Manager's Report - External Learning View external learning information for users whom you directly manage.	Standard	Run Report
Manager's Report - Purchases View a list of users whom you directly manage, and the purchases that each user made. Purchase histo...	Standard	Run Report
Manager's Report - Required Training View information about Required Training assignments (past and current training periods) for users w...	Standard	Run Report
Manager's Report - Required Training Exemptions This report is available to User Managers and only displays users in which a user has selected the M...	Standard	Run Report
Manager's Report - Training Progress View training progress information for users whom you directly manage, including score (if available...	Standard	Run Report

This allows you to view and generate manager specific reports.

****Required Training and Training Progress will likely be the most helpful reports****

Managing your team in iLearn

1. Click **Run Report** next to the report you want to run. The Report Criteria window opens. Select the criteria for the report.
2. Click **Run Report**. A pop-up window will display.



Report Criteria

You're logged in as a proxy.

Use the form below to indicate the parameters for the report you want to run. Then click Run Report.

Records (per page): 25

Layout: Default

Start Date: 5/1/2018

End Date: 8/31/2018

Progress Status: [Dropdown]

Training Type

- Announcement
- Blogs
- Certification
- Classroom
- Curriculums
- Document
- FAQs
- Online
- On-the-Job Training
- Test

User Activity: Active

Cancel Run Report

3. From here you can export the report to Excel, PDF, or XML. You also have the options to display the data using different filtering and sorting options.

Manager's Report - Training Progress

Print | Save New | View Layouts | Refresh | Close Window

Summary

Selected Report Criteria

Report Date: Monday, August 27, 2018	User Activity: Active
Progress Status: All	Training Type: Online
Date Range: 5/1/2018 - 8/31/2018	
Report Layout: Default	
Report Layout: Julie	

Report Results

Total Records: 23	Total Users Managed: 12
Users with Progress Status: 9	Total Courses: 8

Formula | Filter | Add Chart | Add Crosstab

Table

#	Last Name	First Name	Content Title	Enroll Date	Start Date	Complete Date	Progress Status	Score	Report
1	Courtright	Kim	DAS - CHRO - Workday Demo - 01 Introduction	8/21/2018	8/21/2018		Started		Course Statistics Go
2	Courtright	Kim	DAS - CHRO - Maintaining a Harassment Free and Professional Workplace*	8/21/2018	8/21/2018	8/21/2018	Completed	78	Course Statistics Go
3	Courtright	Kim	DAS - CHRO - Preventing Sexual Harassment*	8/21/2018	8/21/2018	8/21/2018	Completed	85	Course Statistics Go
4	Courtright	Kim	DAS - CHRO - Workday Demo - 03 Super User	8/21/2018	8/21/2018		Started		Course Statistics Go
5	Courtright	Kim	DAS - CHRO - Workday Demo - 08 Question & Answer Sessions from Demos	8/21/2018	8/21/2018		Started		Course Statistics Go
6	Davis	Pamela	DAS - CHRO - Maintaining a Harassment Free and Professional Workplace*	7/5/2018	7/5/2018	7/5/2018	Completed	91	Course Statistics Go
7	Davis	Pamela	DAS - CHRO - Preventing Sexual Harassment*	7/5/2018	7/5/2018	7/5/2018	Completed	100	Course Statistics Go

Managing your team in iLearn

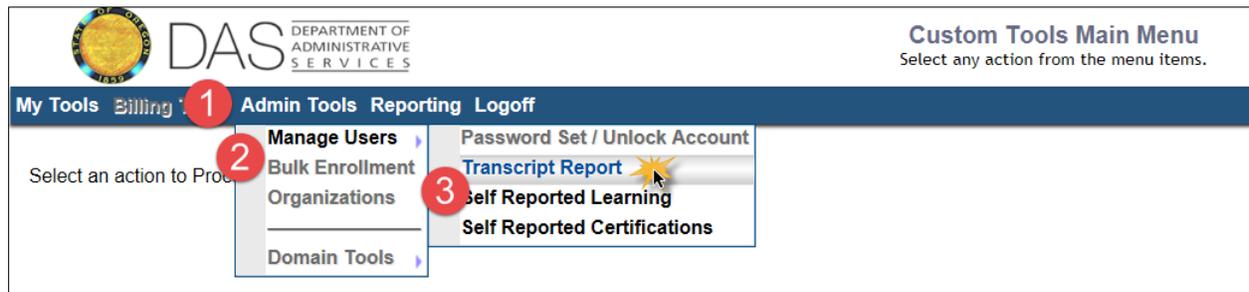
Transcript Report

The Training Transcript report allows you to:

- View staff's comprehensive training transcript containing
 - Completed Training Courses
 - Total Training Hours
 - Instructor Hours
 - Certifications



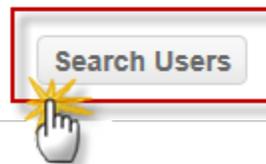
Clicking Custom Tools opens a new window/tab in your browser



Click **Search** – this opens a new window/tab in your browser

View selected transcripts automatically

Selected Users:



Managing your team in iLearn

Enter the name, *click search*

Last Name: Search 
 First Name:
 Roles:
 Search in all Domains Include Inactive Users
 Search in Organization

Select the employee

Last Name:
 First Name:
 Roles:
 Search in all Domains Include Inactive Users
 Search in Organization

Last Name	First Name	Mi.	Empl. ID	Job Title	Agency	Organization Title
Quick	Sarah		OR0053900	Training & Development Spec 1 - X1338	DAS	CHRO Systems - 304

When prompted open the PDF document



Administrative Services, Department of
iLearnOregon Transcript

Date: 06/13/2018

Training - Completed Events

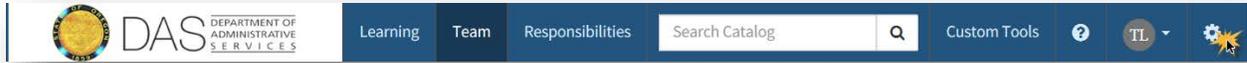
Quick, Sarah **CHRO Systems - 304**
OR0053900

Total Training Hours: 453.88

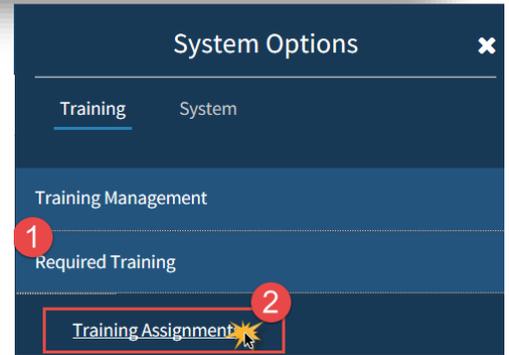
<u>Course Title</u>	<u>Completed</u>	<u>Classroom/</u> <u>Other</u>	<u>Online</u>
Updating Home Address	5/21/2018		

Managing your team in iLearn

Assigning Required Training



1. Click System Options
2. Select Required Training > Training Assignments



3. Acting Role: **User Manager**
 Search Text: **DAS PS Contract Administration**
 Search Type: **All Words**
 Click Search

Required Training Console

Search for content and then assign required training (i.e., select a training profile and entities to which the training will be assigned).

Simple Search | [Advanced Search](#)

To perform a search, select options from the menus, enter keywords in the Search Text field and then click Search. Use the Advanced tab to select criteria to further refine the results.

Acting Role:

Search Text:

Search Type:

4. Locate the training you want to assign: **OSCIO – 2018 Information Security Training (Online)**, Click **Go** next to **Required Training**

Records found: 2

	Title	Type	Action
 	OSCIO - 2018 Information Security Training <i>2018 Information Security Training</i>	Online	Required Training <input type="button" value="Go"/>
 	OSCIO Information Security June 2018 <i>OSCIO Information Security June 2018</i>	Online	Required Training <input type="button" value="Go"/>

Managing your team in iLearn

5. Click Go next to Select Profile

OSCIO - 2018 Information Security Training

Find users that have already been assigned this content as training. Use the Page menu to select a profile and assign training to users.

Required Training

Perform a search to find users to which training has already been assigned. Use the checkboxes and the Cancel Assignment button to cancel training assignments. Use the Page menu, and the Action menu for each user, to perform other tasks.

Last Name

First Name

Select Profile

6. Search for a training profile, click Select

OSCIO - 2018 Information Security Training

Create and manage training profiles. They are used when assigning required training to users.

Select Profile

[Simple Search](#) | [Advanced Search](#)

To perform a search, enter keywords in the Search Text field. Then make selections using the search criteria options, and click Search. Use the Advanced Search link to enter more specific search criteria for your search.

Search Text

Search Type

Records found: 2

	Training Profile	Profile Type
<input checked="" type="radio"/>	DAS - 60 Day Profile <i>This profile is designed to provide staff with 60 days to complete training assigned to them.</i>	Dynamic Date
<input type="radio"/>	DAS - EHRS - NEO Curriculum <i>This training profile is assigned to the new employee curriculum providing DAS new employees with 6...</i>	Dynamic Date

Managing your team in iLearn

7. You can search for a person by name or just leave the Name fields blank and *click Search*. Select who you want to assign the training to and *click Assign Training*

OSCIO - 2018 Information Security Training

Search for users and then assign the content as required training for them.

Assign Training

Enter search criteria and then click Search. Click the checkboxes next to the users to which training will be assigned, and then click Assign Training.

Training Profile DAS - 60 Day Profile

Last Name

First Name

Activity

1 Search

Records found: 10

	Last Name	First Name	User Activity
<input checked="" type="checkbox"/>	Dolquist	Brandon	Active
<input checked="" type="checkbox"/>	Englund	Ryan	Active
<input checked="" type="checkbox"/>	Fitts	Jessica	Active
<input checked="" type="checkbox"/>	King	Anna	Active
<input checked="" type="checkbox"/>	Lantz	Donna	Active
<input checked="" type="checkbox"/>	Miley	Jeanette	Active
<input checked="" type="checkbox"/>	Owens	Cecil	Active
<input checked="" type="checkbox"/>	Posey	Tracy	Active
<input checked="" type="checkbox"/>	Quick	Sarah	Active
<input checked="" type="checkbox"/>	Vidal	Jefferson	Active

2 Assign Training

This content has now been assigned to the selected employees.

OSCIO - 2018 Information Security Training

The required training was assigned to the selected user(s).