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:

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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.

To view detailed information for each user, click 

- 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)
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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.
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**Detailed Reports**

This allows you to view and generate manager specific reports.

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

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.
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Transcript Report

The Training Transcript report allows you to:

• View staff’s comprehensive training transcript containing
  o Completed Training Courses
  o Total Training Hours
  o Instructor Hours
  o 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:
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Enter the name, click search

Select the employee

When prompted open the PDF document
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

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

6. Search for a training profile, click Select
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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**

This content has now been assigned to the selected employees.