Manager Toolkit

For Providers

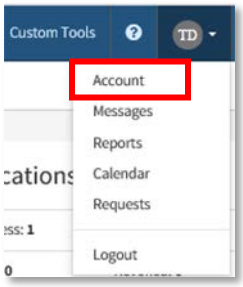
When staff select you as their manager, additional features in iLearnOregon become available to you. You will receive notices when staff register for training. You can also review their transcript and required training status. This toolkit guides you through these features.

February 22, 2018

Manager Area – Team

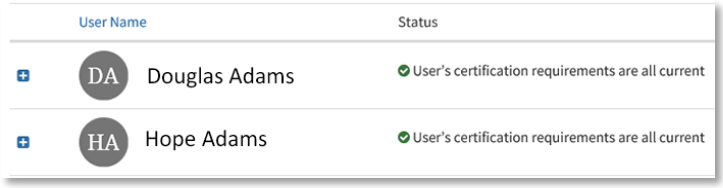
iLearn provides managers with tools in the **Team** menu.

Access is automatic when a user assigns you as their manager. If you don't see this menu, advise your team to update their manager in the **Account** section. (It's under the dropdown menu by their initials.)

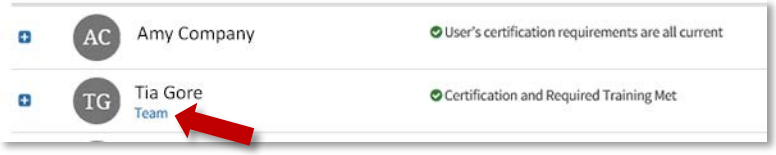


Team - Team

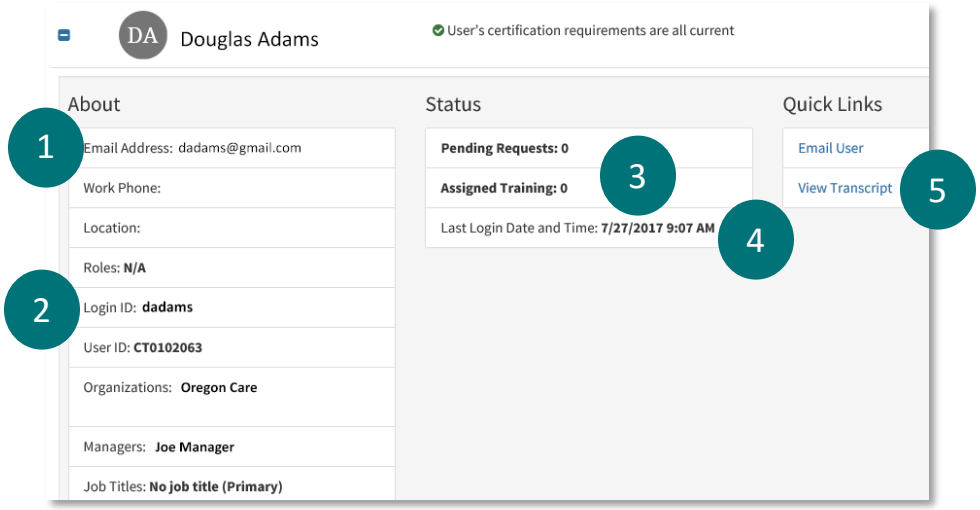
Click on **Team > Team** to see a list of users who have selected you as their manager.



If you manage managers, their work **Team** will appear under their name. If you click this link, you'll see indirect employees who work for that manager. Their transcripts will *not* appear on your reports.



Click the plus sign "+" by each person's name to see additional information.



1. **Staff email address** – Should be kept updated.

2. **Staff Login ID** – In the event your staff forgets their login credentials, they can call the servicedesk. If the servicedesk is unavailable, quickly look here for the Login ID.

   TIP: Advise staff to complete security questions so they can receive a temporary password in the event they forget theirs.

3. **Assigned Training –** When the agency or program area assigns a required training, it will appear here. Not all program areas use this feature, but may in the future.

4. **Last login date and time**

5. **View Transcript –** Allows you to see the person's transcript.

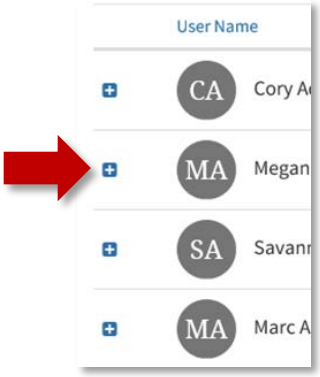
Staff who no longer report to you

- If staff listed in **Team > Team** no longer report to you, please advise them to update the manager field in the **Account** section.

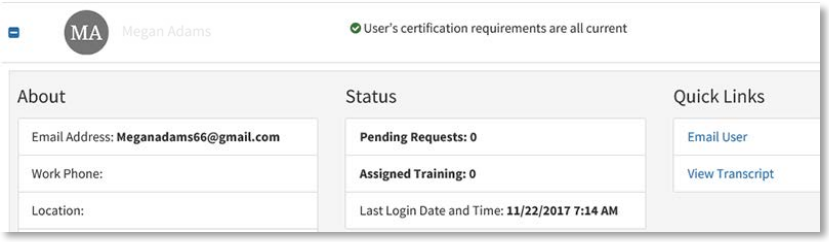
Transcripts for individuals

Go to **Team**, then click on **Team** in the submenu**.**

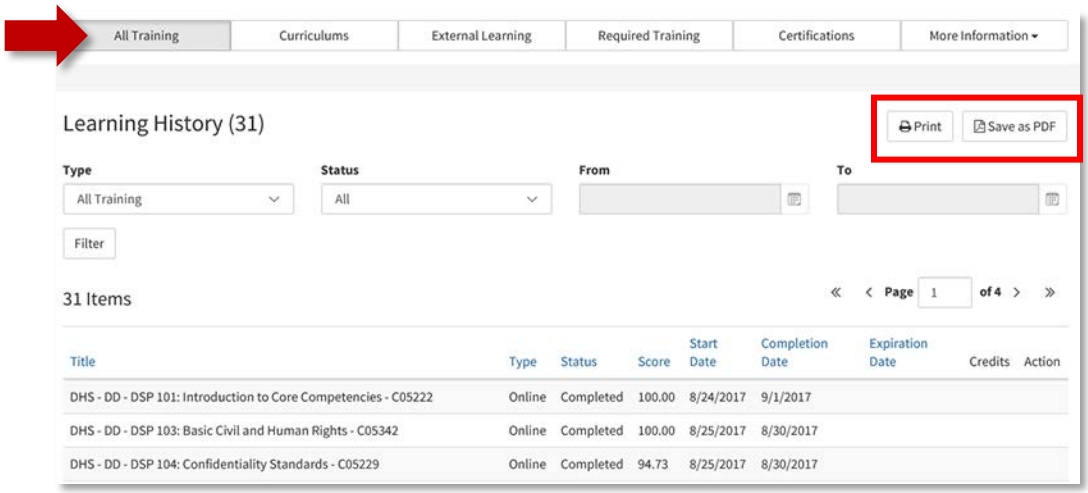
Scroll down the names and find the user name you want. Click **+** (plus sign) by the name.



Under **Quick Links,** click ***View Transcript.***



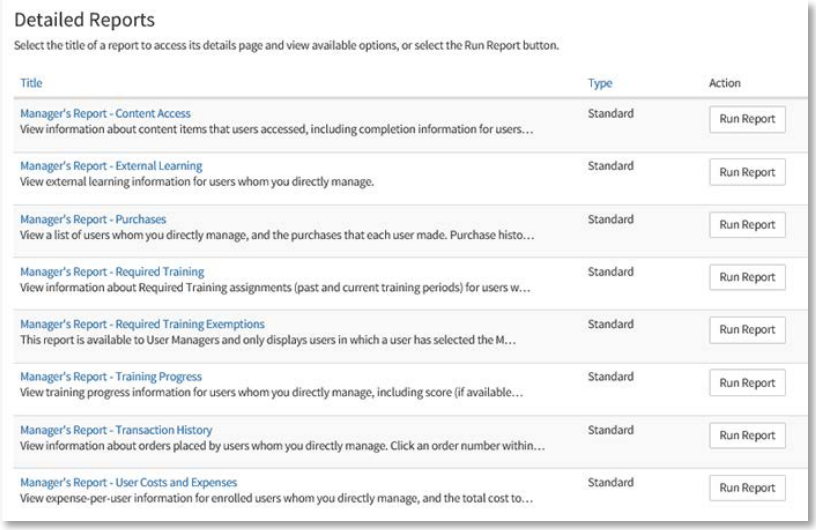
Select the information you want to see in the transcript: All Training, Curriculums, etc.



Select **Print** or **Save as PDF**.

Team – Reports

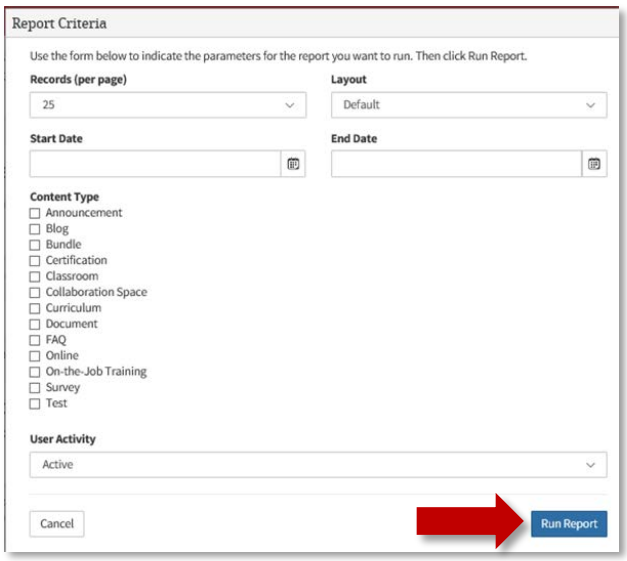
1. Click on **Team > Reports** to see a variety of training reports for people you *directly* manage. Read the description of each report for information about it. Reports include:
   - Manager's Report – Content Access
   - Manager's Report – External Learning
   - Manager's Report – Required Training
   - Manager's Report – Training Progress
     a. Use this report to view training registration of users who have selected you as their manager. Indirect staff will not appear in reports.



2. By the title of the report you want, click **Run Report.** This opens a popup window that allows you to filter report data according to start date, end date, content type (like online or classroom courses), and more.

   If you want to see all report content, leave the fields as-is.

3. Click the blue ***Run Report*** button.

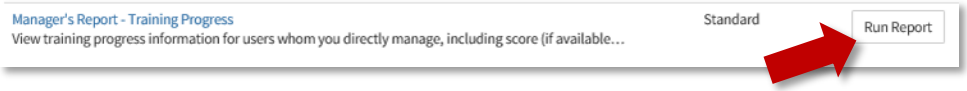


Transcripts with upcoming registrations

You can view upcoming registrations of staff who selected you as their manager.

1. Go to **Team > Reports**.

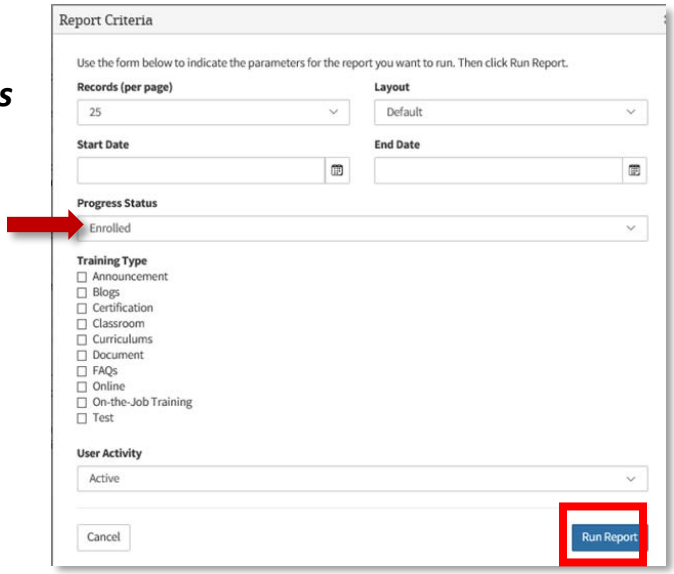
2. By **Manager's Report – Training Progress,** click ***Run Report.***



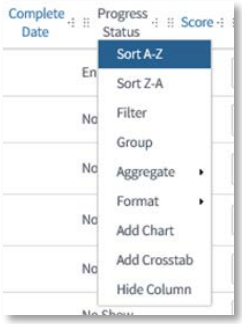
3. In the popup window, under ***Progress Status,*** select **Enrolled** to view upcoming registrations.

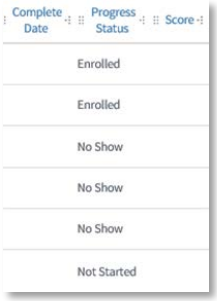
4. If needed, check the training type you wish to search. You can also narrow your search with a start and end date.

5. Click ***Run Report***.



6. A new window will open with your report. In the column headings, click ***Progress Status*** then ***Sort A-Z.***



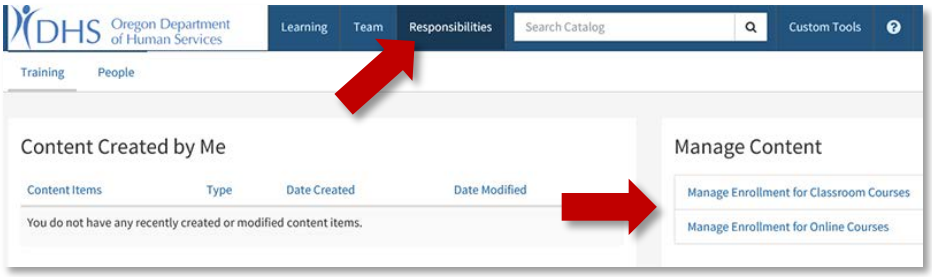


This will arrange the courses in alphabetical order, with **Enrolled** at the top.

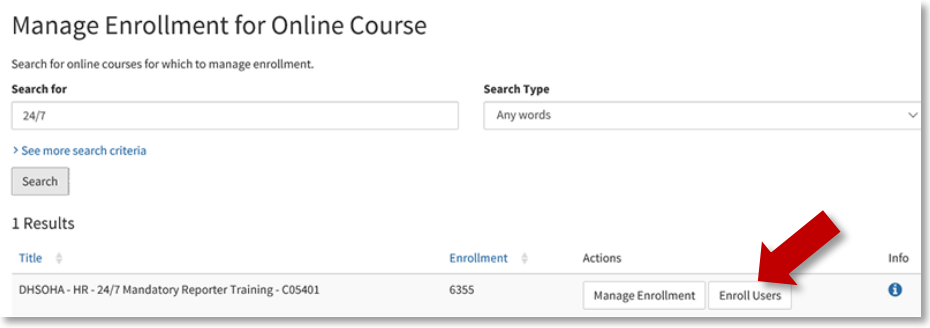
Enroll Staff in Courses

You can enroll your staff members in classroom courses, webinars and online courses.

1. Click ***Responsibilities.*** On the right side of the page, under **Manage Content,** select ***Manage Enrollment for Classroom Courses*** (including webinars) or ***Manage Enrollment for Online Courses.***

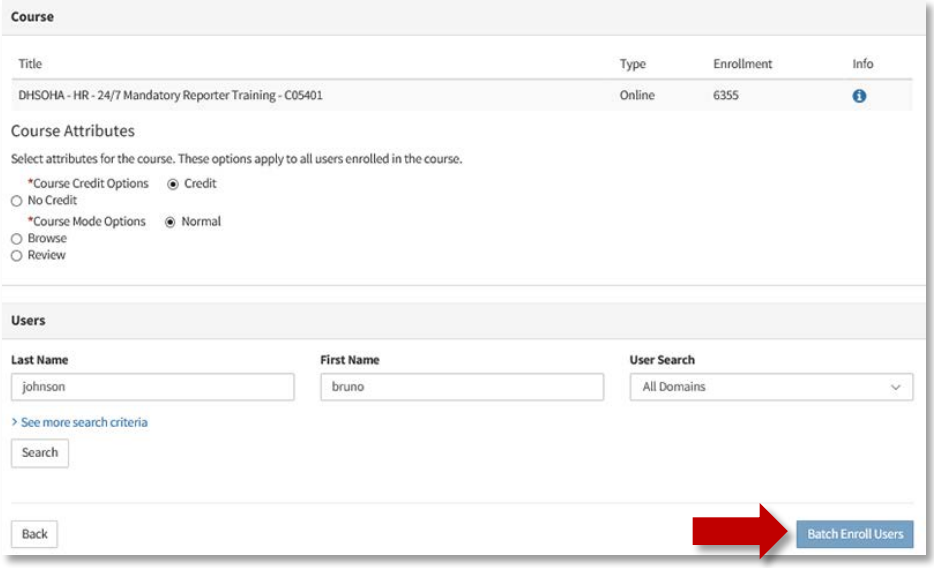


2. Search for the course. By the course title, click ***Enroll Users.***



3. Search for the staff member's name and click ***Batch Enroll Users.***

   NOTE: If you want staff to take the course for credit, change it on this screen.

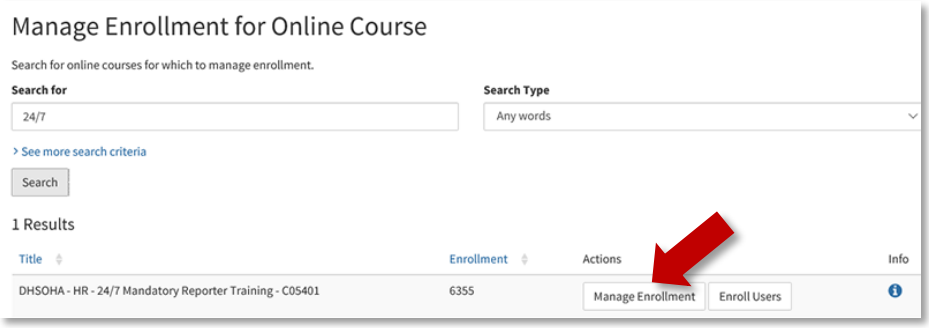
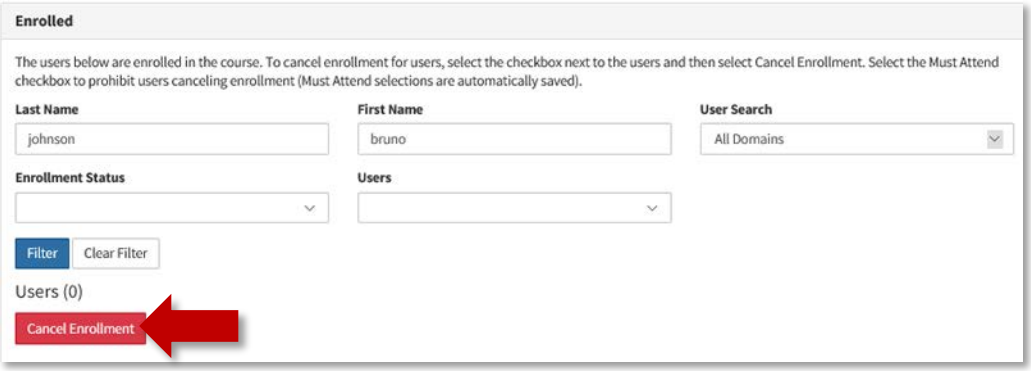


Cancel Staff Enrollment

You can cancel staff enrollment in classroom courses, webinars and online courses.

1. Click ***Responsibilities.*** On the right side of the page, under **Manage Content,** select ***Manage Enrollment for Classroom Courses*** (including webinars) or ***Manage Enrollment for Online Courses.***

2. Search for the course. By the course title, click ***Manage Enrollment.***



3. Search for the staff member's name and click ***Cancel Enrollment.***