OSH Guide:

- **Nursing Managers**
- **Non-Nursing Managers**

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.

March 1, 2018

Contents

How to access your account 3
If you've used iLearn before 3
If you're a new employee 3
Update your iLearn Account 4
Account 4
Profile 6
Preferences 7
Manager Area – Team 8
Staff who no longer report to you 9
Transcripts for individuals 10
Team – Reports 11
Transcripts with upcoming registrations 12
How staff update their manager 13
Manage Enrollment 14
Enroll Staff in Courses 14
Cancel Staff Enrollment 15

How to access your account

If you've used iLearn before

1. Go to the regular iLearn site: https://ilearn.oregon.gov/
2. Use the same Login ID and Password you normally use.

If you're a new employee

1. Access iLearn at https://ilearn.oregon.gov/
2. Use the table below to get started in iLearnOregon (iLearn).

Type of user	iLearn Login	iLearn Password
New employee at OHA	OR#	OR# (OR is capitalized)

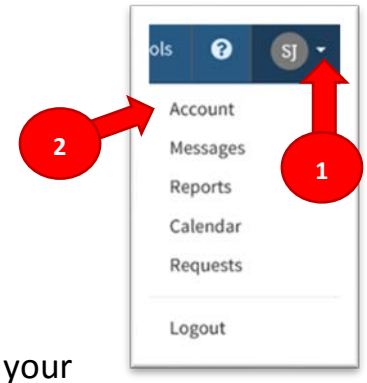
3. **First-time Password Change:** You'll be asked to change your password the first time you log in. The password must be a minimum of six characters. It does **not** require numbers, symbols or a capital letter. **NOTE:** Your password is case sensitive.

   - In the **Current Password** field, enter your temporary password.
   - Enter your new password in the **New Password** and **Confirm New Password** fields.
   - Click the ***Save*** button.

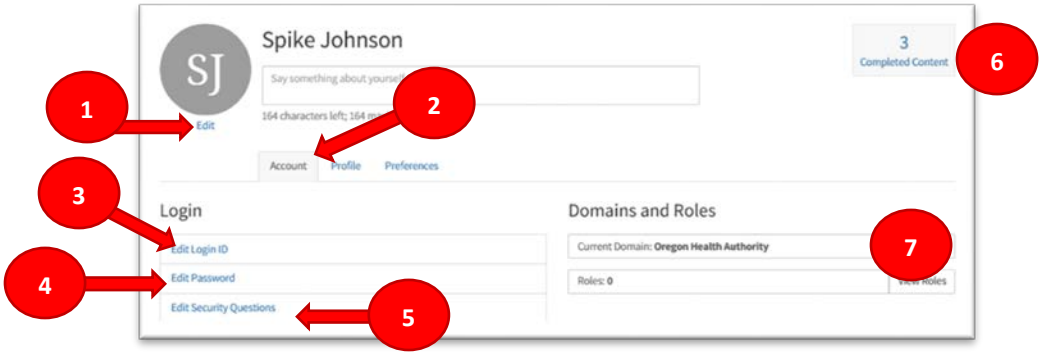
Update your iLearn Account

Follow these instructions to update your iLearn account.

Open Your Account Page: In the upper right portion of the screen, (1) choose the dropdown arrow to the right of your initials, then (2) choose ***Account***.



Account - From the **Account** screen, you can manage many of your account settings and information.



(1) **Edit:** Use this link to change your initials to an image.
(2) **Account tab:** Displays the information in the image above.
(3) **Edit Login ID:** Change your Login ID for the next time you log into your iLearn account. When you're finished, click ***Save.***
(4) **Edit Password:** Change your password for the next time you log into your iLearn account. (See next page for more.)
(5) **Edit Security Questions:** Allows you to reset your password without Service Desk support. (See next page for more.)
(6) **Courses:** Links to your transcript.
(7) **Domains and Roles:** Shows your primary domain (organization) and all the roles and permissions you've been assigned (if any).

Fill out at least one Security Question. That way, if you forget your password, you'll still be able to access your account.

Update your iLearn Account

How to edit your password

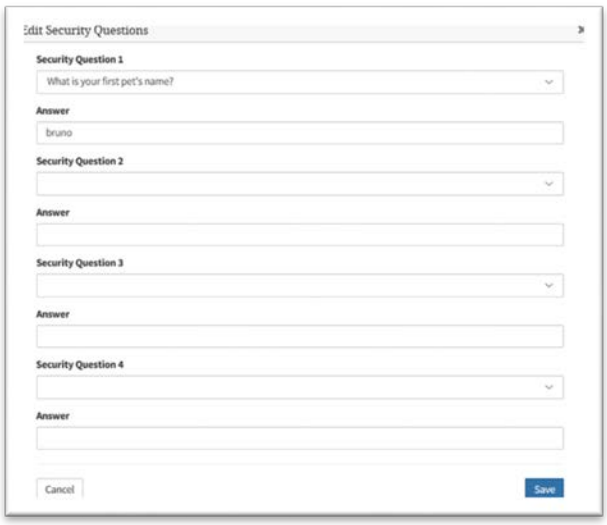
Follow these steps to change your password in the future.

Begin on your **Account** page (see previous page).

- Click the link shown in (4), **Edit Password.**
- Enter your current password, then a new one. The password must be a minimum of six characters, but does **not** require numbers, symbols or a capital letter. **NOTE:** Your password is case sensitive.
- When you're finished, click ***Save***.

Important: If you forget your iLearn password in the future, you can reset it yourself by **creating Security Questions**.

How to create Security Questions

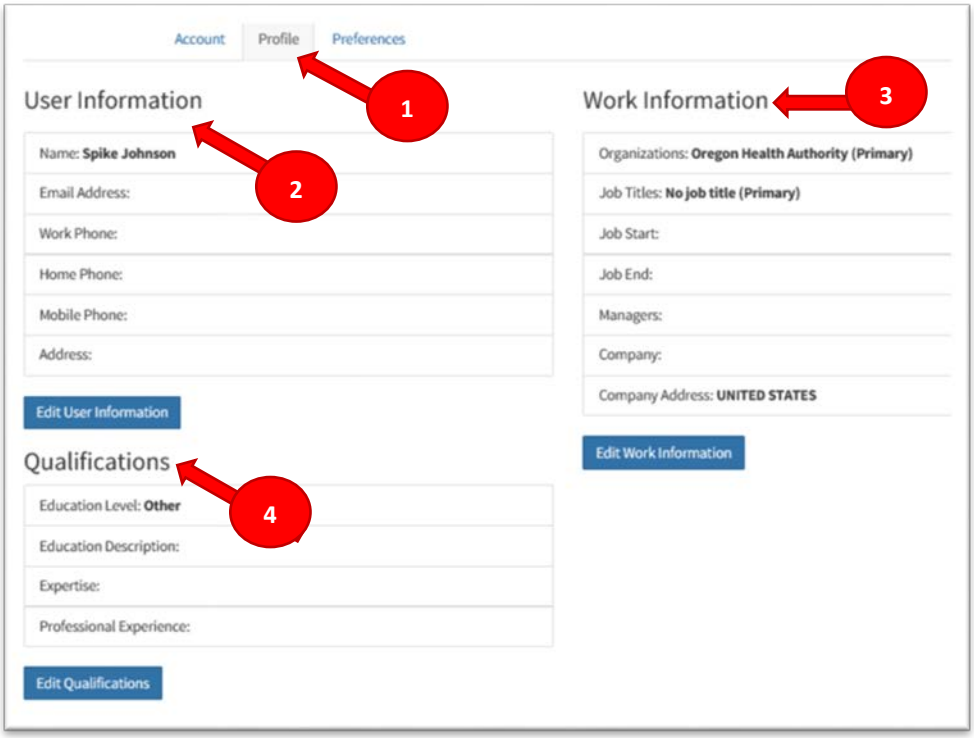


Begin on your **Account** page (see previous page).

- Click the link shown in (5), **Edit Security Questions.**
- For each of the drop downs, choose one **Question** to answer. Type the answer to each question in the matching answer box.
- Answer at least one question.
- When you're finished, click ***Save***.

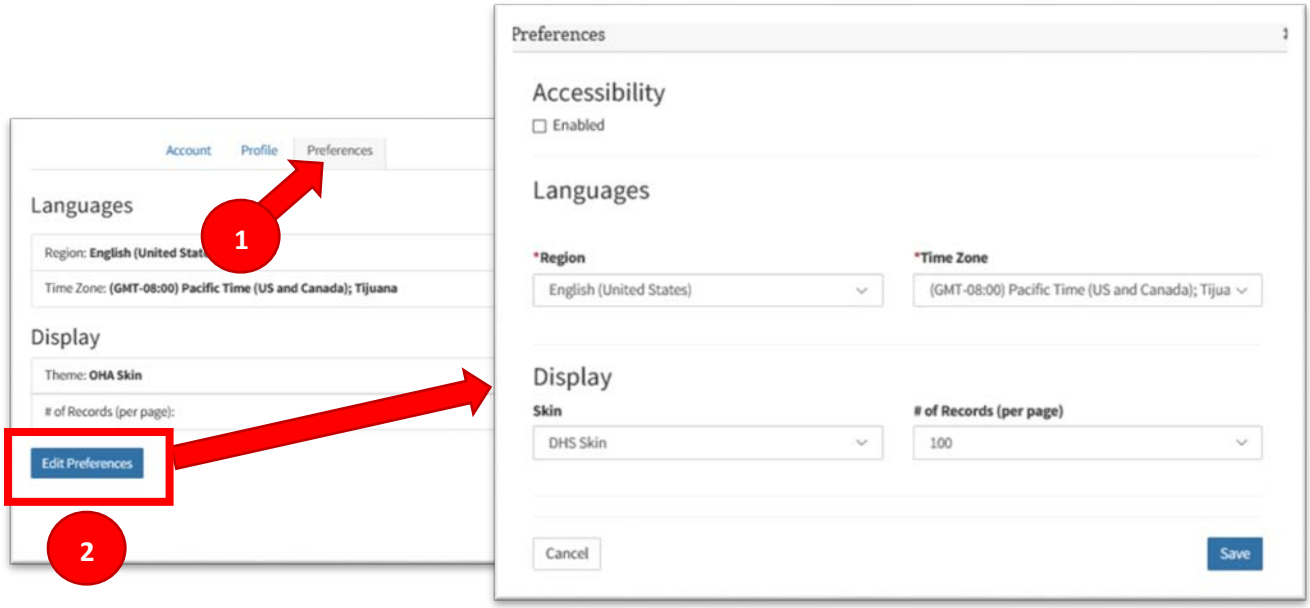
Profile – How to change your information.

NOTE: Most of this information cannot be *permanently* changed in iLearn. See below for more information.



(1) **Profile tab:** Displays the information in the image above.
(2) **User Information:** Name and contact information. This information cannot be permanently changed in iLearn. To change your phone number, see the section, **Outlook Directory Update**. To change your name or email, submit a *DHS|OHA Personnel Action Request Form (MSC 0109).*
(3) **Work Information:** Organizational information. This information cannot be permanently changed in iLearn. **To change your manager or job title**, see the section, **Outlook Directory Update**.
(4) **Qualifications:** Professional and educational background information. This can be changed in iLearn by clicking the ***Edit Qualifications*** button. When you're finished, click ***Save***.

Preferences – For accessibility, languages and display.



(1) **Preferences tab:** Displays the information in the image above.

(2) **Edit Preferences:** Enable accessibility and change the number of records per page.

POWER USER TIP: In the **Preferences** area, change your ***DISPLAY*** to 100 records per page.

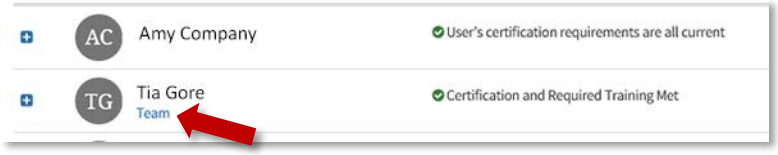
When you're finished making changes, click ***Save.***

Manager Area – Team

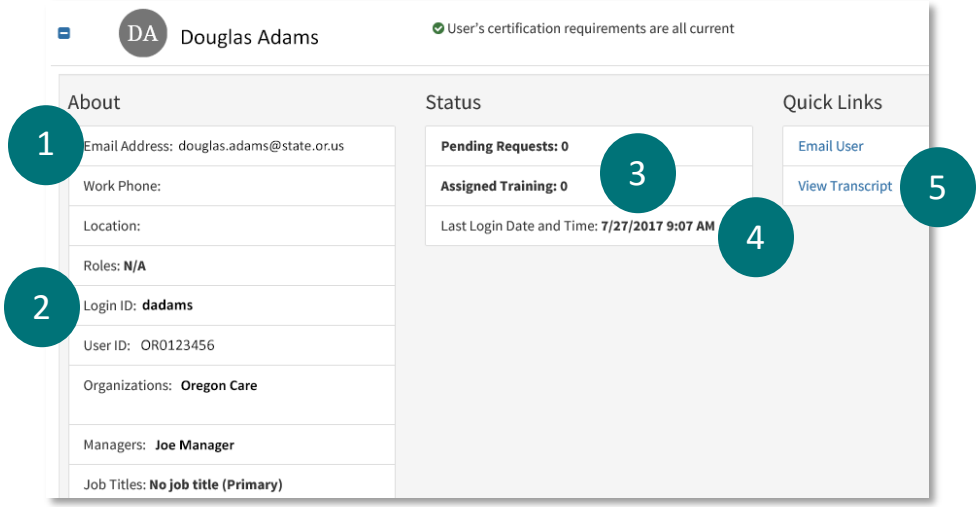
iLearn provides managers with tools in the **Team** menu. (***NOTE:*** The **Learning** tab is for your courses as a student.) The **Team** tab appears automatically when a user assigns you as their manager. If you don't see the menu below, ask your team to update their manager in Outlook.

Reminder: The manager field in Outlook is integrated with iLearn. Ensure staff list you as their manager in Outlook. See the section, **How staff update their manager**.

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** – Email addresses are automatically updated from the Outlook address book into iLearn.

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 to staff it will appear here. Not all program areas are using this feature, but may in the future.

4. **Last login date and time**

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

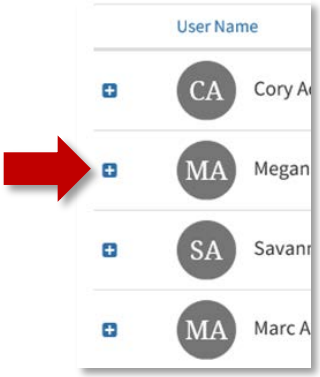
Staff who no longer report to you

- If staff listed under **Team** no longer report to you, please advise them to update the manager field in Outlook .
- If they left state service, please email dhs.training@state.or.us

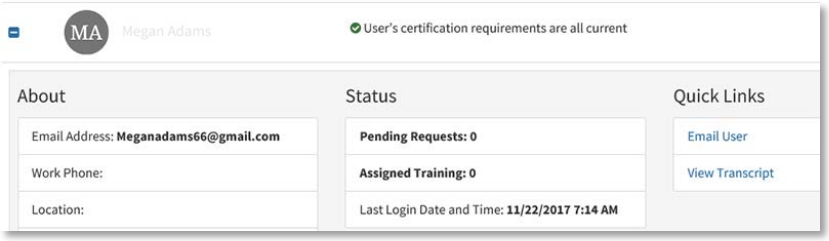
Transcripts for individuals

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

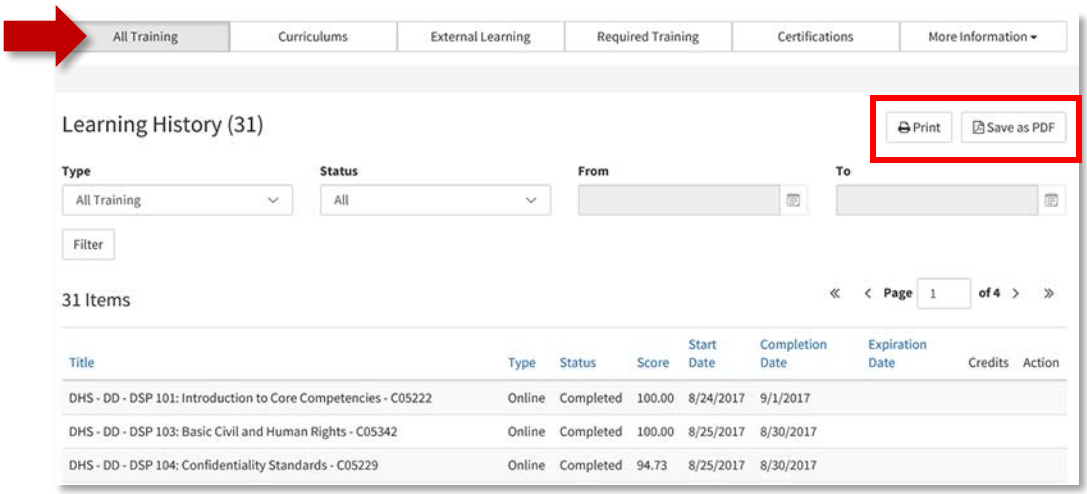
Scroll down the names and find the user name you want. Click **+** (plus sign) by the name.



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



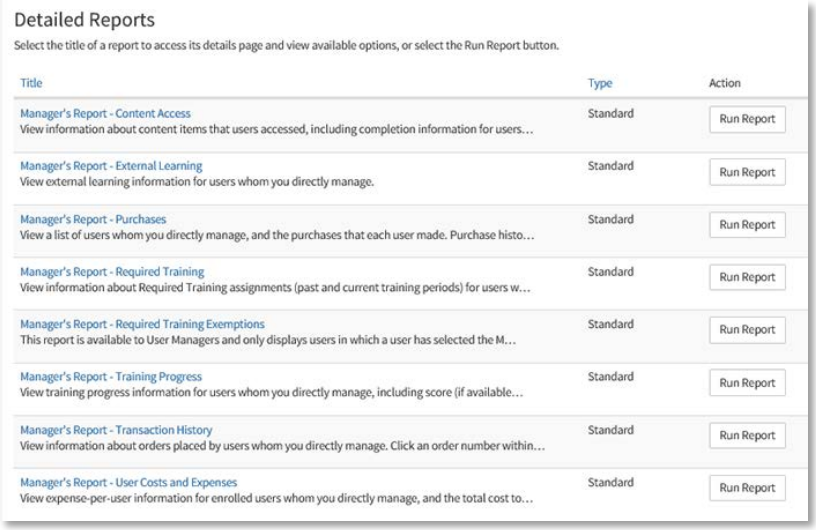
Select the information you want to see in the transcript: All Training, Curriculums, etc.



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

Team – Reports

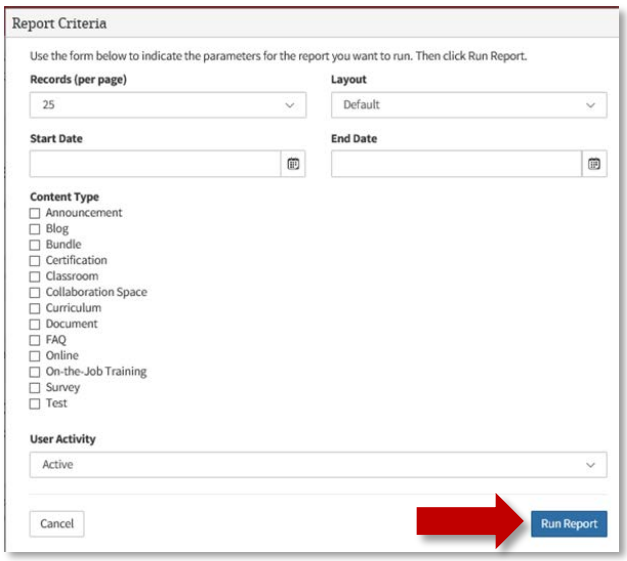
1. Click on **Team > Reports** to see a variety of training reports for people you *directly* manage. Read the description of each report for information about it. Reports include:
   - Manager's Report – Content Access
   - Manager's Report – External Learning
   - Manager's Report – Required Training
   - 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.

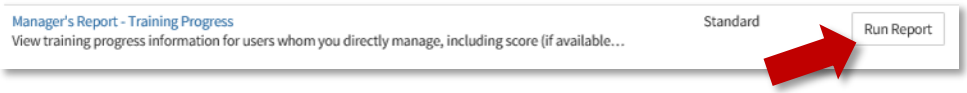


Transcripts with upcoming registrations

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

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

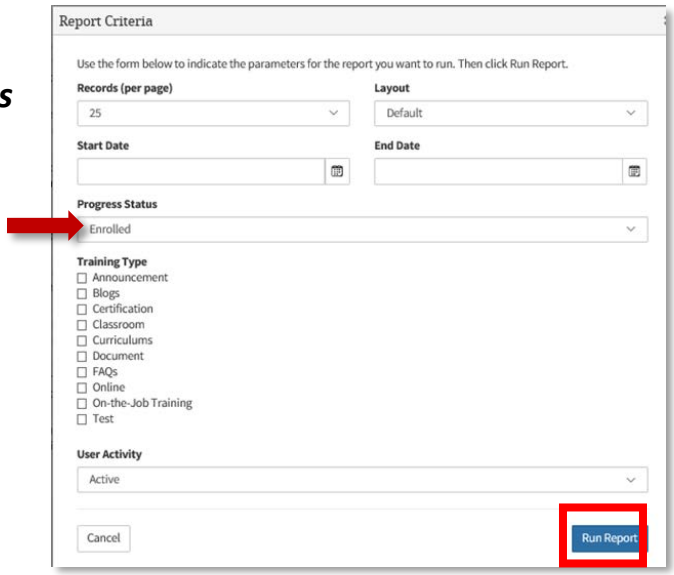
2. By **Manager's Report – Training Progress,** click ***Run Report.***



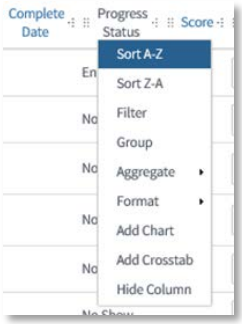
3. In the popup window, under ***Progress Status,*** select **Enrolled** to view upcoming registrations.

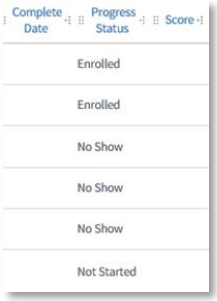
4. If needed, check the training type you wish to search. You can also narrow your search with a start and end date.

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.

How staff update their manager

You receive notices when your staff register for training. You can also review their transcripts. First, however, they must update their manager in the **Outlook Directory Update**.

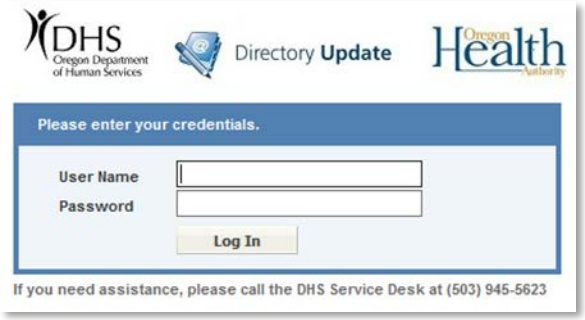
NOTES:

- Although staff members can update their manager in iLearnOregon, the change will be temporary and overwritten by the **Directory** within 24 hours. **NOTE:** Partners/providers change their manager's name in the **Account** section of iLearn.
- Remind staff to update their manager whenever their manager changes.

Instructions for staff:

1. Open the **Directory Update.** **NOTE:** ***Use Internet Explorer as the browser.***

2. Go to http://DirectoryUpdate to open the DHS|OHA Directory Update login page. The User Name is your OR number; the Password is the same one you use for your agency-issued computer or laptop. Click the **Log In** button.

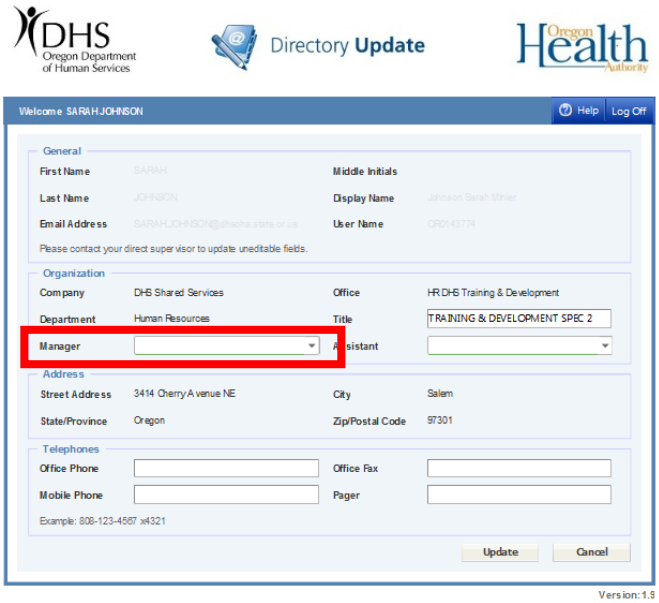


3. Your current **DHS|OHA Information Directory** page will open.

4. Enter your manager's last name first, followed by first name. A list of names will appear in a dropdown window. Click on the correct name, and make sure it shows in the field.

5. Click **Update**. If you make a mistake, click **Cancel.**

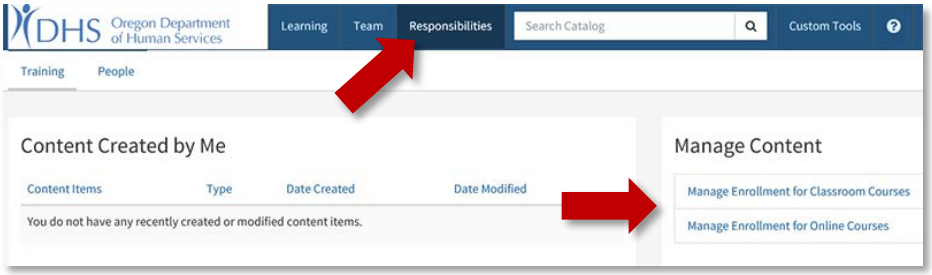
6. Click **Log Off** (on the lower right of the screen).



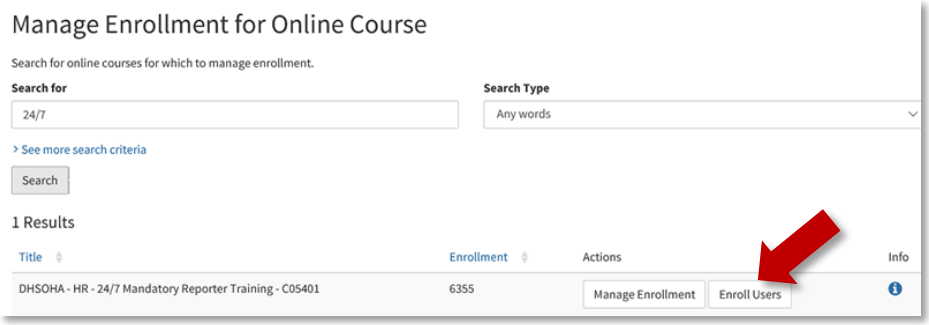
Enroll Staff in Courses

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.***

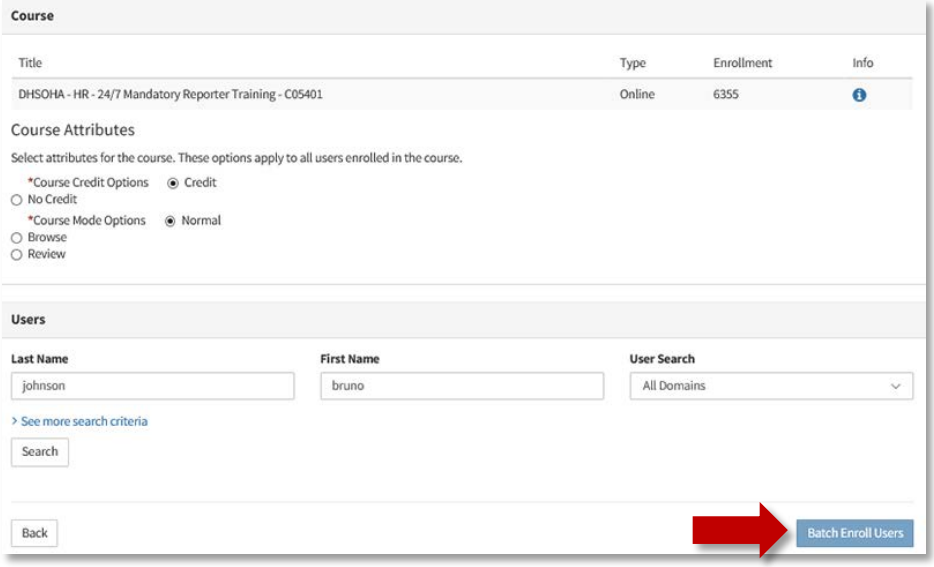


2. Search for the course. By the course title, click ***Enroll Users.***



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.

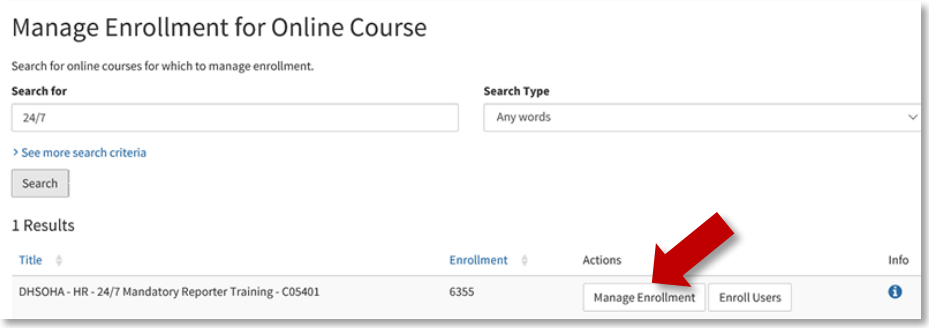
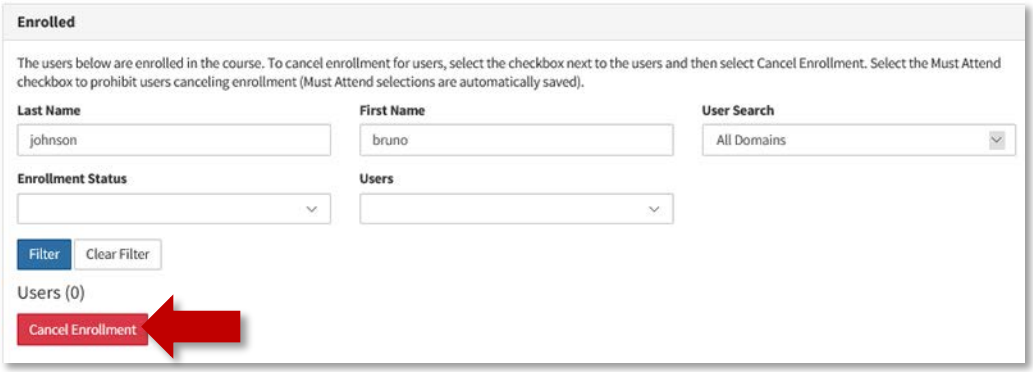


Cancel Staff Enrollment

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.***