My Team/Manager Dashboard

Orientation Guide

The My Team/Manager Dashboard feature is available in sccLearn to agencies and departments that maintain the manager/employee data relationship in PeopleSoft that is fed into sccLearn.

- This tool is viewable to managers, supervisors and executives in an agency that has this feature enabled in sccLearn.
- If your agency has implemented the My Team/Manager Dashboard feature and you, as a manager, supervisor, or executive, do not have the My Team icon, please submit a support ticket to the TSS Service Desk at support@tss.sccgov.org. If the reporting structure is incorrect, contact your department's HR PeopleSoft Coordinator.

01/2021

Why Use My Team/Manager Dashboard?

There are many reasons and many ways to use the My Team/Manager Dashboard feature in sccLearn. We've provided some of them in this orientation guide, but we're sure you will discover more as you use the feature. Here are the top reasons to use My Team/Manager Dashboard:

1) Find out who in your team of Direct Reports and Indirect Reports is out of compliance with their assigned training. Trainings such as Sexual Harassment Prevention are required for all employees to complete on a regular basis, so knowing where your team stands with these can keep us all in compliance.
2) Generate a report by exporting the data of all your reports who are out of compliance for a particular assignment.
3) Search sccLearn for the perfect training activity (course, book, audiobook, webinar) and assign it to them.
4) Directly register your reports to attend the same class on a particular date.
5) Emulate an employee's view of scclearn and see details of their completed trainings and activities that they have registered for (or those you have registered them for).
6) Keep up to date with the activities that your reports are engaged in when you receive copies of registration email notifications as well as their reminder notifications.

How To Use This Guide

This guide is designed to cover the basics of the My Team/Manager Dashboard – how and why you'd use it. The guide also provides some answers to frequently asked questions and a glossary.

As there are several similar but slightly different views that are available to you, it may be helpful for you to open your My Team/Manager Dashboard and follow along with the guide the first time you use this feature so you can become familiar with its capabilities. Seeing this visually for your team will allow you to better understand the feature as you will be viewing the examples with your team, rather than the fictitious team that is being used in the images. Once you become familiar with what is possible, it will be easier for you to navigate the system and jump to the section of the guide for a visual reminder.

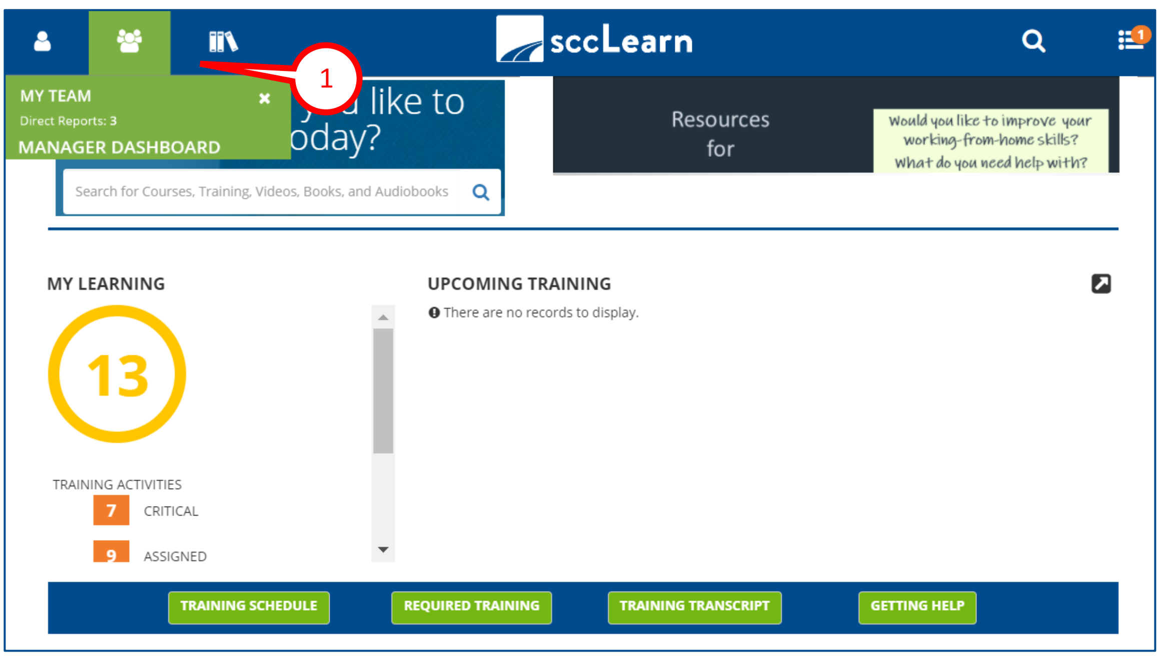
This guide assumes you are familiar with sccLearn and its ability to manage the registration process for training activities (which could include in-person training courses and classes, webinars, web based training, books, videos, etc.) to keep track of and serve as a record of training completed by employees. sccLearn provides the learners access to many self-paced trainings that have been:

- Built by County Agencies – examples include Mastering Behavioral Health Codes, Teleworking at the County and the Welcome to the County.
- Purchased from vendors (i.e. Skillsoft) – examples include courses for professional development and Microsoft software, as well as Bundles that have been curated by Skillsoft for a particular topic.

If you would like to learn more about the features of sccLearn and how to maximize your efficiency with sccLearn, take a look at all of the sccLearn Resources such as quick reference guides and videos available on the Learning & Employee Development website.

Table of Contents

I. Locating the My Team/Manager Dashboard



- Look for the **My Team/Manager Dashboard** icon (1) on the top left of the Homepage header and click to view additional options.

II. Keeping Track of Compliance and Training

There are multiple ways you can keep track of compliance for your employees once you click the **My Team** icon on the sccLearn homepage header. Some of the options available to you are:

- My Team for a hierarchical view that shows the percentage of completion towards compliance trainings.
- Manager Dashboard to see a summary of incomplete assignments for your direct reports grouped by employee or by activity.
- Emulate Employee (available through **My Team)** allowing you to emulate the employee to see the status of all their training activities.
- Export the details of your employees so you can generate a report for your reference.

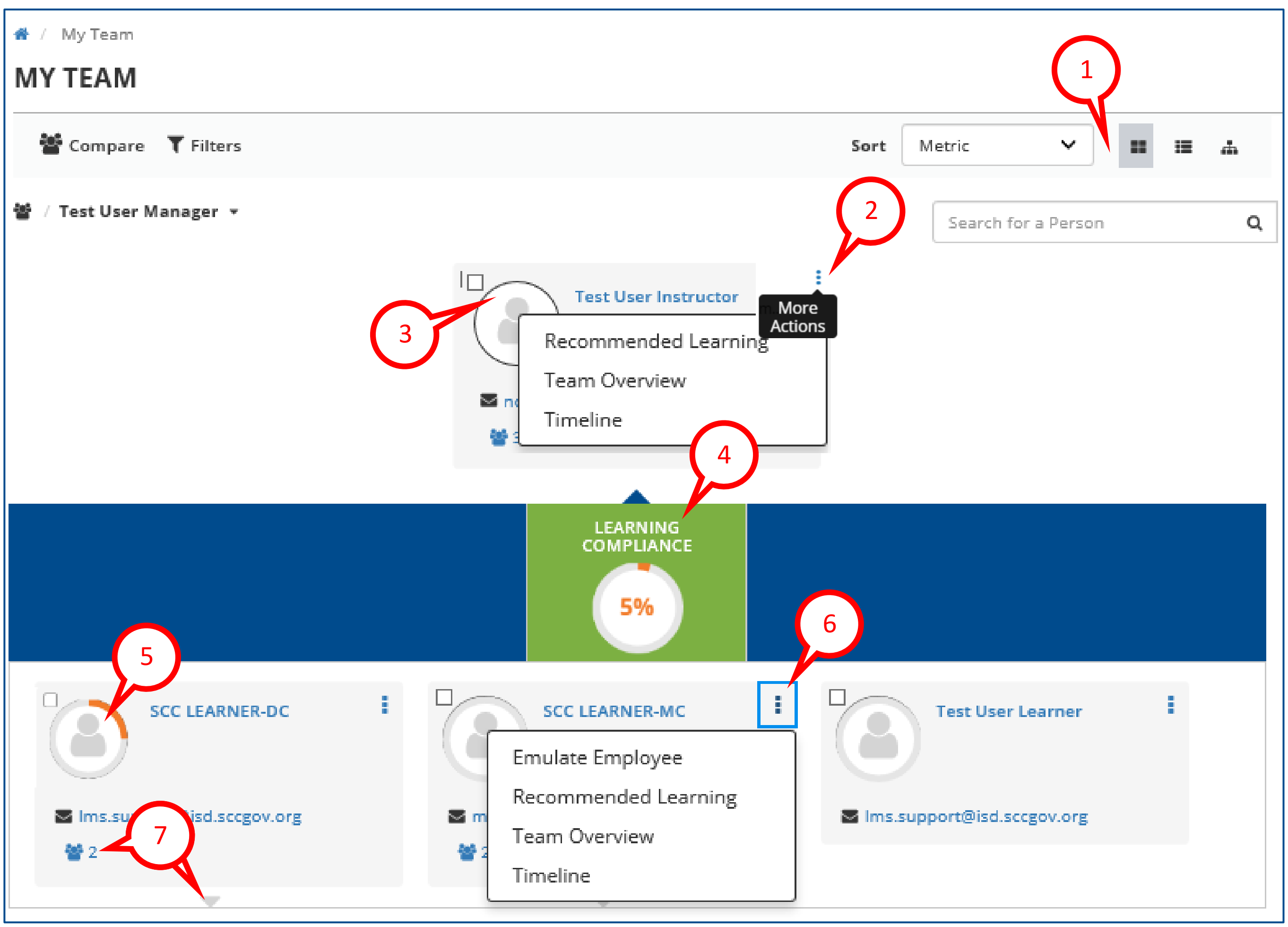
My Team ~ Compliance Training Completion Overview

Features in More Detail:

- Displays hierarchical view of completion towards **compliance trainings assigned to your team**.
- Quickly see the status of your team overall and then hone down to see the status of each individual direct report, or even your indirect reports.

Access: Click on the **My Team** icon on the sccLearn homepage header, then click **My Team** From the menu.

Details: *Note - the My Action menu options have been expanded for demonstration purposes.*



- The default tile view is sorted by Metric. You can change this view to sort by name or change the display to view a list or hierarchical tree (1).
- Click **More Actions** (2) at the top of the hierarchy (3) for your profile for easy access to some features.
- The **Learning Compliance** circle is a visual representation of the overall progress that your direct reports have made towards the completion of assigned training (4).
- Your Direct Reports listed (5) with a visual indicator of their individual completion status for assigned trainings. Click **More Actions** (6) for actions you can take for each individual employee.
- Clickable visual indicators (7) if the direct report has direct reports to allow you to view your Indirect Reports and their progress towards compliance training completion.

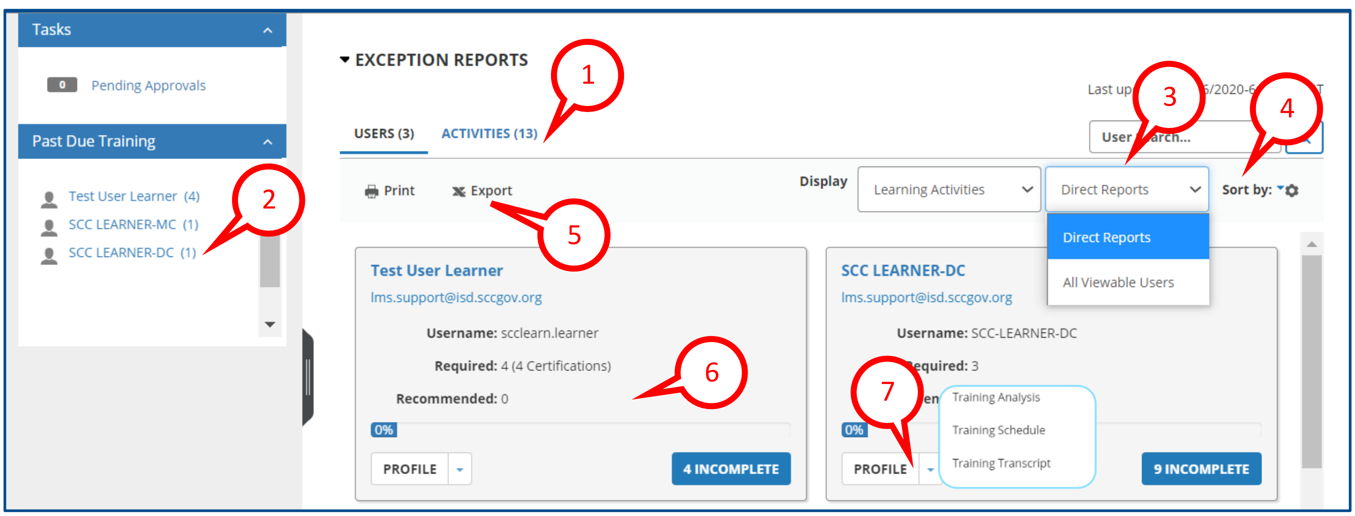
Manager Dashboard ~ Detailed Snapshot of Outstanding Activities

Features in More Detail:

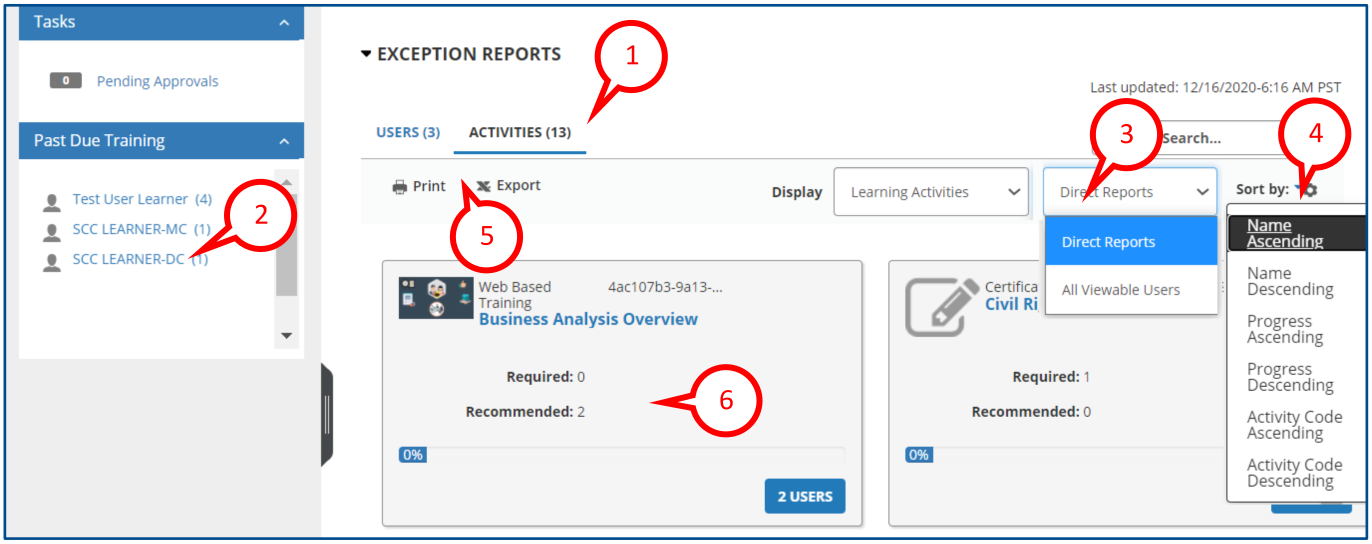
- View all assignments for your team.
- View the dashboard by Users or Activities, and direct reports or all reports.
- Quickly see who is past due on their training.
- Export the display to Excel for reporting.

Access: Click on the **My Team** icon on the sccLearn homepage header, then click **Manager Dashboard** from the menu. Select to view the report by **Users** or **Activities, Direct Reports** or **All Viewable Users** which includes your indirect reports.

Details – User's View: *Note –menu option has been expanded for demonstration purposes.*



Details – Activities View: *Note – menu options have been expanded for demonstration purposes.*



- Switch between the **User** and **Activities** views (1).
- Employees overdue on their training assignments will be identified (2) so you don't need to drill down and locate past due activities.
- View only the **Direct Reports** or **All Viewable Users** (3) which would include all indirect reports.
- Choose a **Sort** option to display the results (4).
- **Print** or **Export** the users and activities displayed on the dashboard (5).
- The tile will vary based on the whether you are viewing the **Users** or **Activities:**
  - In User view, you'll see indication of how many activities are required and recommended for the employee along with a button to dive deeper and see what they are (6).
  - In the Activity view, you'll see indication of how many employees are required and recommended for the activity along with a button to dive deeper and see who they are (6).
- The **Profile** button drop down menu in the Users view (7) provides quick access to "Emulate" the employee to view their sccLearn account.

Emulate Employee

Features in More Detail:

- Emulating your report(s) can be helpful to view the status and details of the activities that this report is assigned to or has registered for.
- Emulation features work as if you are working with sccLearn for your own learning.
- Looking at their home page, you can quickly see the assigned activities for your employee as well as any due dates coming due or they may have missed. This can also be viewed through the exception report on the Manager Dashboard view.
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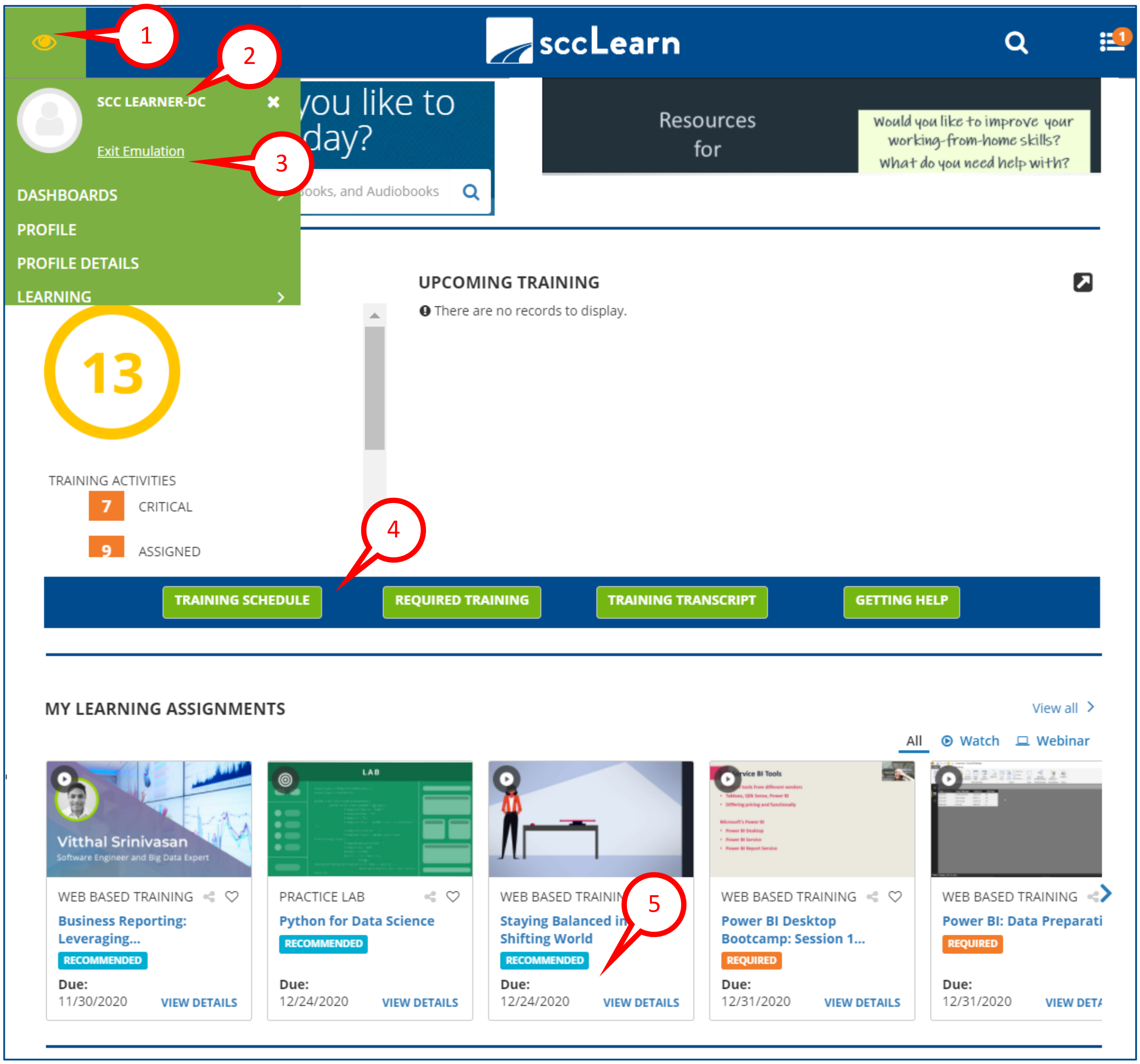
Access: From the **My Team** view click the **More Actions** button on an employee card and select **Emulate Employee** to view their homepage.

Details: *Note - the menu option has been expanded for demonstration purposes.*



- The “**Eye**” icon (1) indicates you are in emulation mode.
- Click the “Eye” icon, to display the **name of the employee** you are emulating (2) and **Exit Emulation** (3) to close the emulation window.
- On the employee’s homepage you can perform functions such as viewing the employee’s **Training Schedule** (4), **Required Training, or Training Transcript.**
- You can view their incomplete **Learning Assignments** (5) and the status of each, whether it is required or recommended along with the dues dates for each activity if specified.
- Note: Initiating online training is **restricted** to the employees themselves.

Export Details for Reports

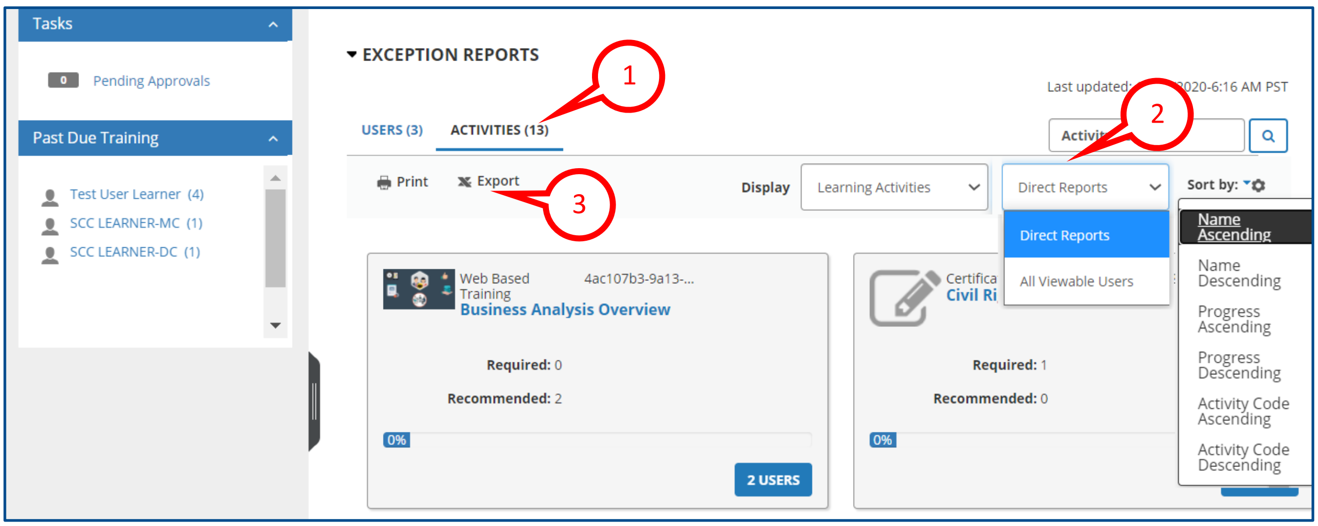
Features in More Detail:

- Export the on-screen data from sccLearn to Excel so you can sort and filter the data for reporting purposes.
- Export feature is available for:
    - My Team views
    - Manager Dashboard views
    - Emulation views such as Training Transcript

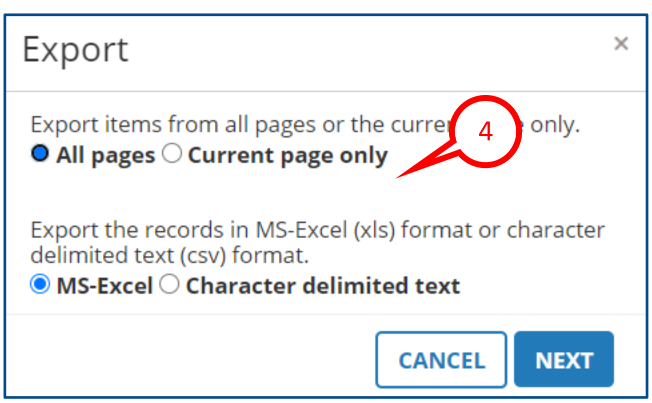
Access: Click on the **My Team** icon on the sccLearn homepage header, then click either **My Team** or **Manager Dashboard** from the menu and look for the **Export** icon.

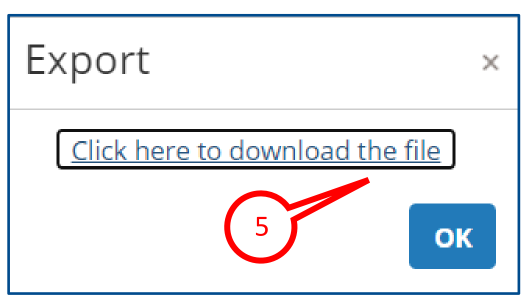
Note: Look for the Print/Export icon in other sccLearn views.

Details:



- Prepare the display to include the information you would like to export. The exporting tool relies on the information displayed, so the exported data for the image would include the outstanding activities (1) for the direct reports. If you would like to see all indirect reports, you'd need to change the view (2).
- Once the display is configured to include the information, look for the **Export** icon (3) to initiate the export. Also available is a print option which will allow you to print the results.





- Select if you want the export to include all pages of data or just the current page and the **format** to export the report to (4). It is easiest to export all pages to Excel and click **Next**.
- Click the **hyperlink** to download the file (5). Based on the browser being used the method to view the file will vary.
- Once the file is opened in Excel, you can sort and filter the data to meet your needs. Just be sure to save the file as an excel file before you exit.

III. Training For Your Employees

There are two main ways for you to add training to your employees' profile in sccLearn. Once you have found the activity for your report(s) in sccLearn, you can:

- Assign the activity which they must register for and complete by a certain date.
- Register them directly to the activity so it is already on their Training Schedule.

It is always a good idea to discuss training before assigning it to your direct and indirect reports, so they are aware of the assignments. Also, as a manager, you will be notified any time an employee registers for (or cancels) any activity in sccLearn.

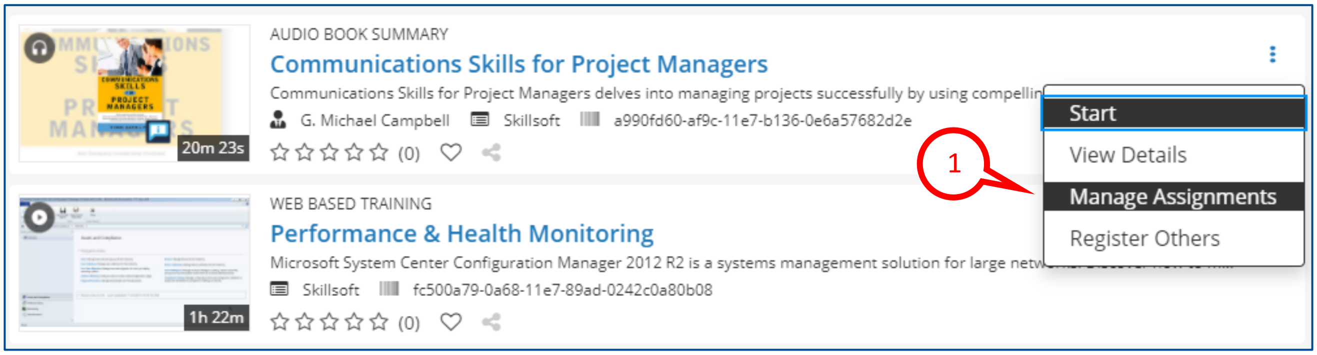
Assigning & Recommending Training to Your Employees

Features in More Detail:

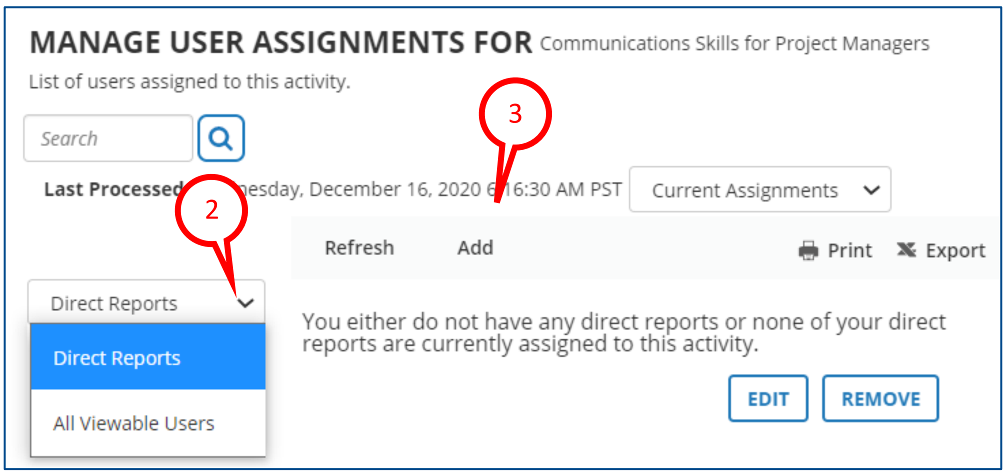
- You can specify the assignment to be:
  - Required - the employee must complete the activity. This is the best practice.
  - Recommended – this may cause confusion (see glossary) and is not the preferred option.
  - Completed by a specified date.
- Both required and recommended assignments will behave the same way, the only difference is the label of required or recommended.
- The employee will receive a notification email from sccLearn when the activity is assigned.
- The employee needs to register for the activity before they can complete it and you will be notified when they register.
- Assignments remain on the employee's account until the assignment is complete or you remove the assignment. If they decide not to complete a recommended activity, you will need to remove that assignment from their account.
- Their progress towards completion is tracked and displayed in the My Team/Manager Dashboard.

Access: Locate the activity you would like to assign, then from the **More Actions** menu, select **Manage Assignments.**

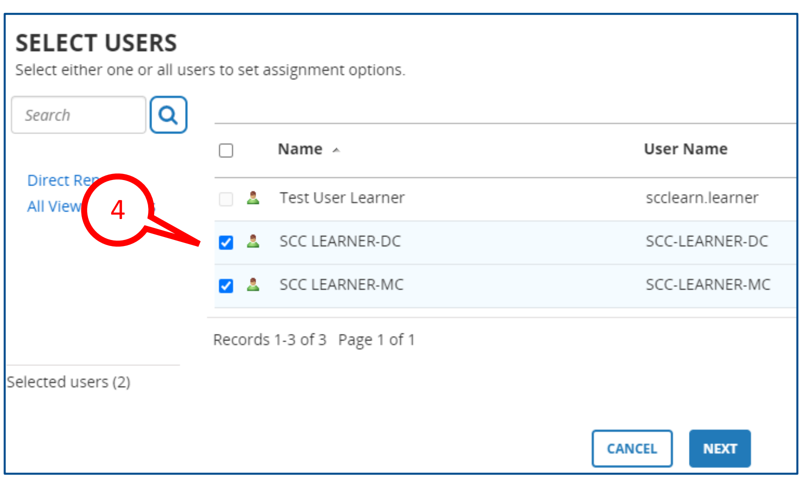
Details:



- You could assign most types of activities including courses, classes, books by using the **Manage Assignments** option from the **More Actions** icon (1).
- While an actual **Learning Bundle** (collection of sccLearn activities) itself cannot be assigned, you can assign an individual activity within a bundle by searching for the activity title.

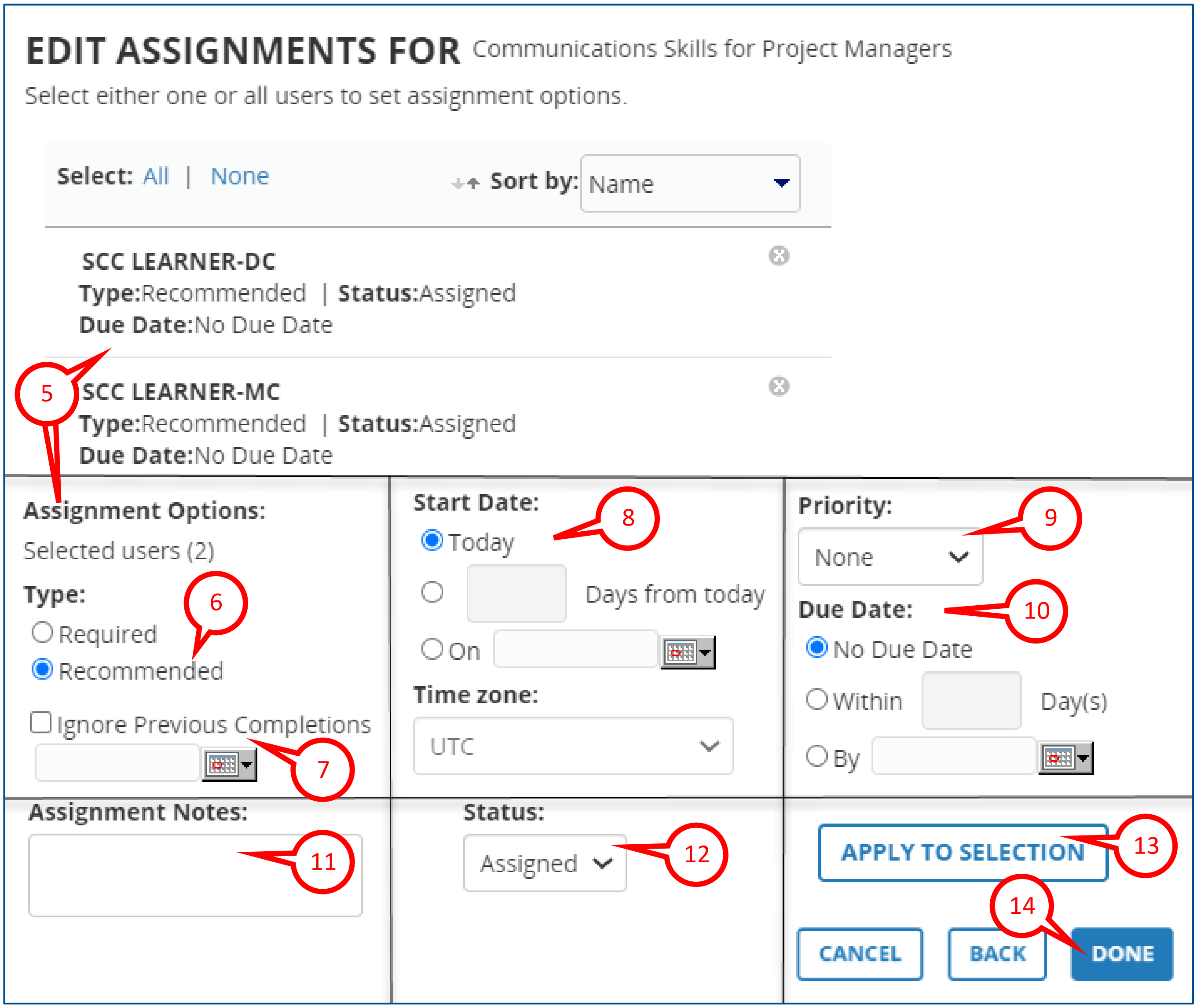


- If you have direct reports already assigned to this activity, they will be shown on this screen. To view your indirect reports that are already assigned to this activity, you can switch the view between **Direct Reports** or **All Viewable Users** (2).
- To make a new assignment, click **Add** (3) to view the names available for selection.



- The default view lists your direct reports. To view all your reports, click the All Viewable Users link.
- Select the **checkboxes** beside the names (4) and click **Next**. If you will be assigning the activity as required for some of your reports and recommended for others, you will need to perform these actions twice having selected the names that apply to each assignment.

Note –selection boxes appear vertically in one column but have been rearranged for this image.



- Confirm the **correct employees** are selected (5), then decide if this assignment is **Required** (must be completed) or **Recommended** (optional) (6). *Note: as a reminder, recommended assignments will remain on the employee's profile until it is completed or until you remove the assignment.*
- If you are assigning an activity they may have already completed, you can make them retake the activity by clicking **Ignore Previous Completions** (7). This can be helpful if you want everyone to be (re)trained at the same time.
- Enter a **Start Date (8)** if you would like to delay the Start. This can be helpful if you would like to stagger the training assignments to not overwhelm the employee.

- Setting a **Priority** is optional (9), but you are highly encouraged to add a **Due Date** (10) to set expectations. The due date is tracked by the My Team/Manager Dashboard and reminder and overdue notifications will only be sent out if a due date is configured.
- **Assignment Notes** (11) can be helpful, but it is better to have discussed this assignment with the employee before assigning it. **Status** (12) should remain as assigned.
- To complete the assignment(s), click **Apply To Selection** (13) followed by **Done** (14) to assign the training to the selected employee(s). you and the employees will receive an assignment notification.

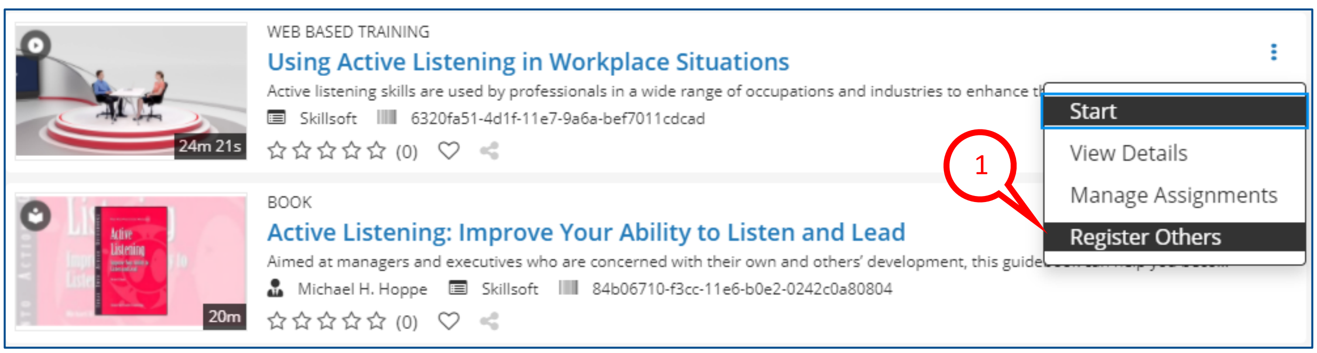
Registering Your Employees for Training

Features in More Detail:

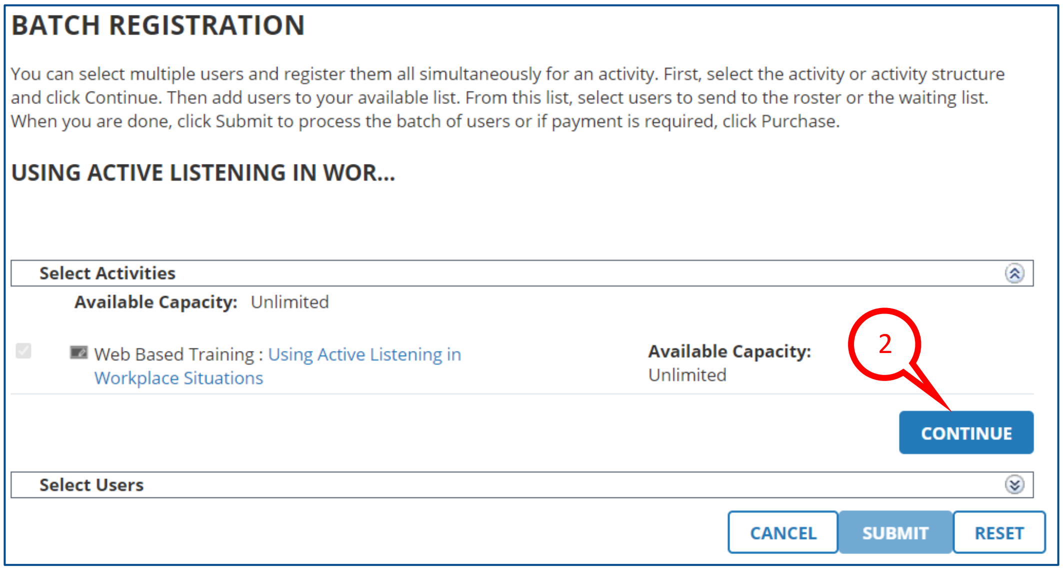
- You can register multiple employees at the same time for specific activities.
- When registering for classes, you can select from dates available and secure a seat for the employee. *Note: if the class is full with a waitlist, the employee will be put on the waitlist.*
- The registered activity appears on their timeline and training schedule as if they had registered themselves.
- The employee can cancel the registration if they chose not to complete the training.

Access: Locate the activity in sccLearn through Search, then from the **More Actions** menu, select **Register Others**

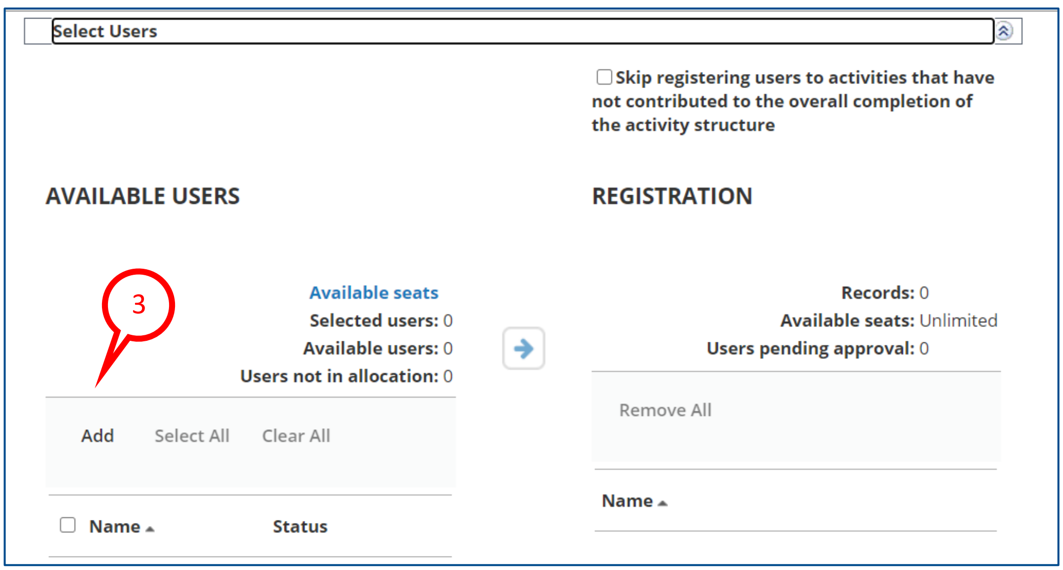
Details:



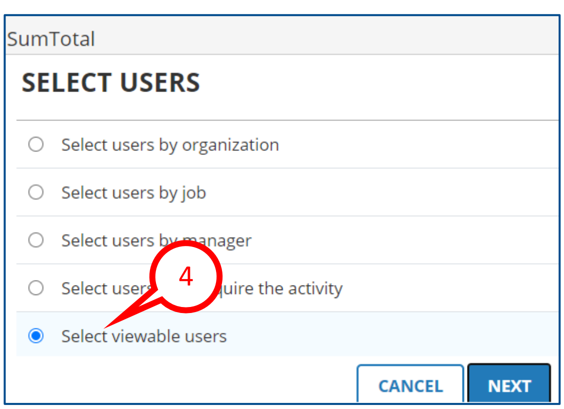
- You could register your employees for most types of activities including courses, classes, books by using the **Register Others** option from the **More Actions** icon (1).
- While an actual **Learning Bundle** (collection of sccLearn activities) itself cannot be registered to, you can register employees to individual activities of a bundle by searching directly for the activities themselves.



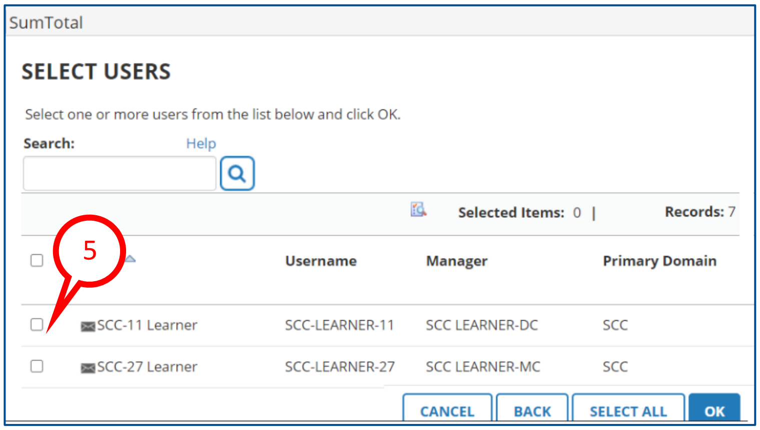
- Verify the correct activity is selected and click **Continue** (2)



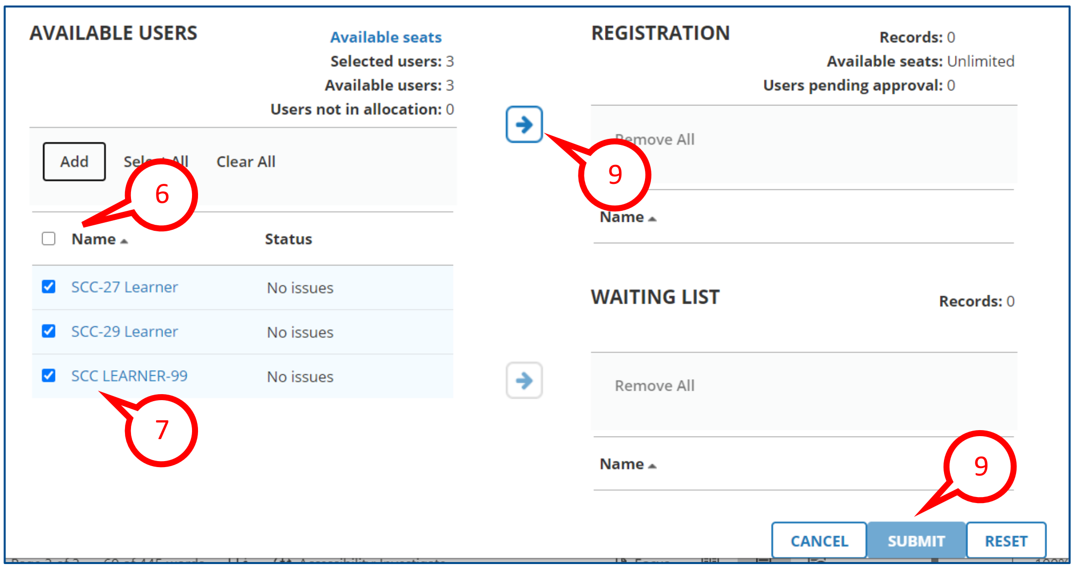
- Click **Add** (3) to select the employees to register for the activity.



- In the pop-up screen that follows click **Next** to **Select Viewable Users** (4)



- Select the employees that you would like to register for this activity and then click **OK** (5).



- Click the checkbox beside the **Name** column title to register all displayed employees for this activity (6), or individually select the **Employees** (7).
- Register the selected employees by clicking the arrow pointing to **Registration** (8) before you **Submit** the request (9).

IV. Frequently Asked Questions (FAQ)

FAQs Related to Assignments

Can I assign training to all employees that report to me?

Yes. When you assign activities, you can select the view to display your direct reports or all your viewable users (which includes indirect reports) from the drop-down menu. You can then select all your reports using the checkbox on the column header or some of them via the checkbox options.

What is the difference between assigning and registering?

Assign	Register
Employees cannot un-assign themselves from an assignment.	Employees can cancel a registration that you register them to.
The exception report accessed through the My Team/Manager Dashboard displays a summary of all outstanding assignments.	To track completion of a registration, you would need to: • Keep track of the activities you registered the employee for. • Periodically emulate the employee and view their transcript to see if they completed the activity.

When should I assign an activity to an employee vs register them to an activity?

A best practice is to always assign an activity so that you can let the system track the assignment and, for scheduled activities, allows the employee to choose which date and time they prefer to attend. If you want the employee to take a specific class on a specific date/time, then you could also register an employee for the class. However if you only register them for the class without the assignment, it is harder to track if they completed the activity or not.

When I assign a course, what is the difference between Required or Recommended?

The only difference is that you can let the employee know if you recommend the training or require it. sccLearn manages both assignments in the same way. Both assignments remain on the employee's assignments until they are completed. With the recommend assignment, if the employee chooses not to complete it, they cannot remove the assignment - you will need to remove the assignment.

Will my direct report receive a notification that they are assigned a course/class?

Yes, the employee will receive a notification when they have been assigned or registered for a course, a class or other activity within sccLearn. The best practice would be to communicate the assignment and registration directly with your report **prior to assigning or registering** so they are informed when they see it in their sccLearn account.

When I assign training, do I also receive a copy of the notification sent to the direct report?

Yes, you will be copied on the assignment notification sent to the employee. You will also be copied on the reminder and overdue notifications.

When I assign a course, will sccLearn still assign it if the employee has previously completed it?

The employee will still receive the notification from sccLearn that the course was assigned; however, when they view details of the course, sccLearn will show their assignment status as Satisfied.

Can I reassign a previously completed course for the employee to retake it?

When you assign the course, if you check "ignore previous completions", the employee will need to retake the training to satisfy the requirement.

Can I automatically assign entire-team training to new employees on my team?

You can assign training to your entire team through the Manage Assignments tool. When new employees join your team that also need to complete this training, you can assign it as part of your onboarding process.

Can I extend the due date of an assignment for an employee who is on leave?

If you assigned the activity, you could extend the due date. You cannot modify an assignment that was made by an sccLearn Administrator for a county-wide required course like HIPPA or Sexual Harassment Prevention. Most compliance reports sent to the owner of that assignment will include employment status if the PeopleSoft database has been updated to reflect the leave.

FAQs Related to Viewing Completion

How long will the completion status remain in view?

sccLearn retains an employee's completion status for seven years after they leave the County. You'll be able to see an employee's training transcript as long as they are one of your reports.

Will I see recurring yearly trainings?

As long as an employee is out of compliance (i.e., assigned, expired, or overdue) for an assigned course, that information will be displayed on the Manager Dashboard. Once the employee completes the course, the information will be displayed on the employee's training transcript as it is no longer an "Exception". When the training is reassigned for the next completion requirement, the course will again appear on the employee's Exception Report. If you want to see all the trainings that are assigned to a report, you can emulate that employee and view their **Required Training**.

Can I extract reports for my direct reports regarding their training?

There are currently no reports that you can extract from sccLearn. Using the Export feature, you can export data including the Exception Reports displayed on the manager dashboard to Excel to create a report.

Can I setup alerts for when assigned training dates are due to expire?

Alerts are configured in the system by default. When your reports are assigned training with a due date, typically three months prior to the due date, both you and your employee will receive a reminder auto-notification email from sccLearn.

Can I receive a report on how much time my employees spend in training?

You can use the Emulation feature to see an employee's training transcript and training schedule to view the trainings in progress and completed.

Can reports be automatically sent on a periodic basis?

Reports cannot be auto-generated directly from the My Team/Manager Dashboard. You will receive copies of auto-notifications sent to your employees about assigned courses approaching or passed the due date. In addition, you can export the Exception Report or your team's Activities to Excel.

How do I view the due date for a course that has been assigned to a team member?

The Exception Report displays the status in the summary view. To view the assignment due date and details, click the "Incomplete" button.

Why does a completed assigned activity not appear on the Exception Report or Training Transcript?

If your direct report indicates they have completed the activity, but it is not appearing in their views, there may be a discrepancy with the system. Submit a TSS service desk ticket for investigation.

My report transferred to another manager, but sccLearn reflects them in My Team?

If the reporting structure is incorrect, contact your department's HR PeopleSoft Coordinator.

How do I request the My Team/Manager Dashboard if I do not have it?

The Manager Dashboard is available on a department-by-department basis. The availability of the Manager Dashboard for your department is contingent upon the manager and employee relationship data being maintained by your department in PeopleSoft. To request the My Team/Manager Dashboard for your department or agency, submit a TSS service desk ticket.

V. Glossary

All Viewable Users

The **All Viewable Users** views include your direct reports and indirect reports. If you have additional privileges within the system, you may see additional users in this view.

Assigned Training

Assigned training is training that is assigned to the employee as either Required for completion or Recommended for completion. Assigned training could be training that you have assigned or training that an indirect manager (your manager) has assigned to the employee. It could also be assigned on a department-wide or countywide basis. You can assign a course that you would like them to register for, a web based training, a book or any activity which exists within the system. The assignment can have a completion date associated with it but does not need to. In addition, any training that is assigned will be included in your My Team/Manager Dashboard view, must be completed by the employee, and cannot be removed (unless you remove it as the assigner).

Compliance Training

Compliance training is typically related to a policy or a requirement by an external governing body that has been assigned to the employee by the system. The training is required to be completed by a particular date (or timeframe) and may need to be repeated on a regular interval. An example of this type of training is the Sexual Harassment Prevention Training assigned by the Equal Opportunity Department that needs to be completed within a number of months from starting with the county and every two years thereafter.

Direct Reports

These are the team members that report directly to you.

Emulation

Emulation allows you to view and interact with sccLearn as if you were the employee. So, for example, you would be able to see their timeline as they would see it if they were logged into the system. Likewise, you can view their training schedule as they would see it. Emulation does have restrictions though, for example, you cannot launch a web based training or book on their behalf, as they would need to complete it themselves. You also can not view the My Team feature of a direct report. Emulation can be helpful if you would like to review their training schedule or transcript to ensure they have completed training or when they are planning on attending.

Indirect Reports

These are the team members that report to your direct reports that are also managers.

Recommended Training (Not Preferred)

We do not recommend assigning Recommended training. When assigning training as Recommended for completion, you (or the indirect manager) indicate to the employee that the training is **optional** to be completed, however, as the employee cannot remove assigned training, the recommendation will <u>remain on</u>

the employee's assignments until it is completed or removed by you as the assigner. sccLearn manages both required and recommended training in a similar manner.

Registered Training

Registered training is training that the employee registers themselves for or you register the employee for. This training will not appear on your My Team/Manager Dashboard. Registering employees can be useful if you see a class being taught next month that you would like the employee to attend. As seats may be limited, registering them for the class would ensure they were able to secure a seat in the class. This would also help you manage the team schedule. When registering your employees for training, remember:

- You will receive a notification that the employee registered for the training.
- The employee can cancel the training as this is a registration and not an assignment.
- To confirm the completion for this training you would need to emulate the employee.

Required Training (Best Practice)

When assigning training as Required for completion, you (or the indirect manager) indicate to the employee that the training is required to be completed. sccLearn manages both required and recommended training in a similar manner. An example of this could be assigning a presentation skills training for an employee to building their confidence to speak at team meetings.