Using the Manager Dashboard

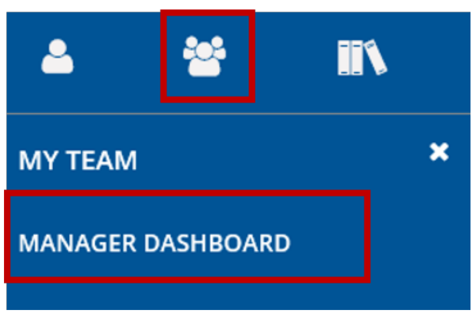
As a manager or staff member with access to review online or in-person training completions for employees in a department at UF or UF Health Shands, you can use this guide to help you complete the following tasks in the myTraining application:

- Log in to the myTraining
- Access the Manager Dashboard
- Review Training Timeline of Employees
- Review Training Transcript of Employees
- Access and Save Employee's Certificates from Transcript
- View Incomplete Assignments for Employees
- Assign Training to Employees
- Assign Training via Search icon
- Register Employees for Training

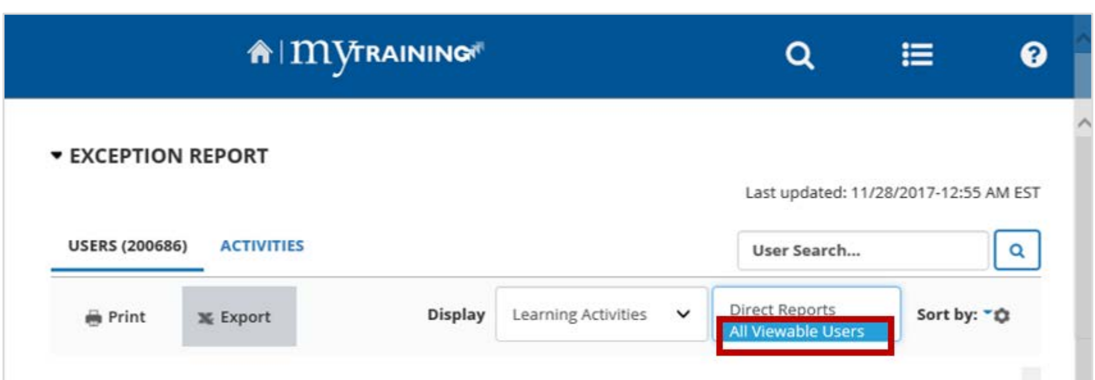
NOTE: The UF_N_EL_PROXY role is required to complete these functions.

Log in to myTraining and Access the Manager Dashboard

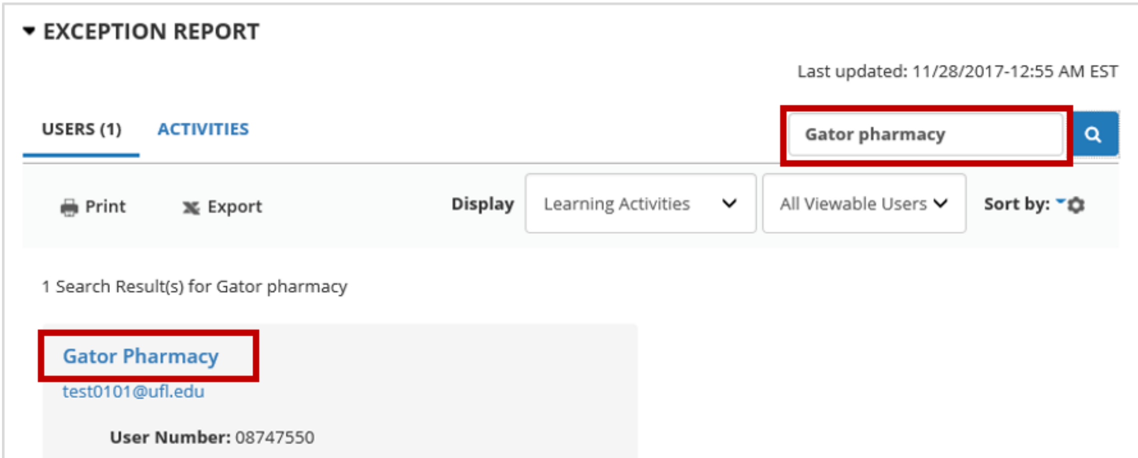
1. Log in to myTraining.
2. Navigate to **My Team > Manager Dashboard**. The Exception Report page opens.



3. Select the dropdown arrow next to Direct Reports and select **All Viewable Users**.

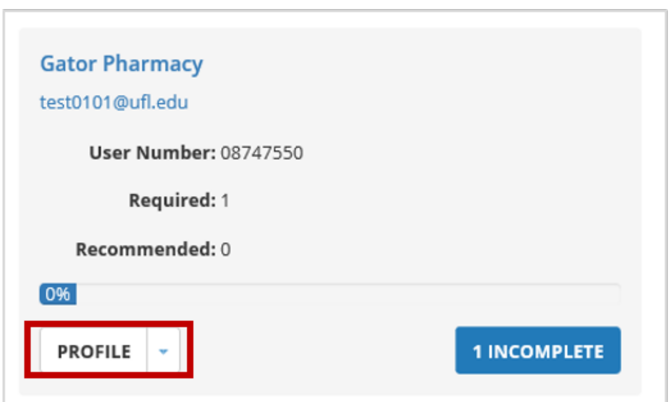


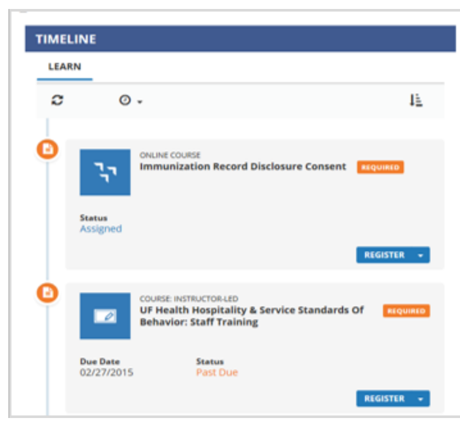
4. All learners who are members of the department(s) that you have access to manage will be grouped together in this view. This list of users can be rather large depending on your provisioned access in myTraining.
5. Locate the **user** – OR- Enter the **UF ID** or **name** in the User Search box and click Se**arch**.



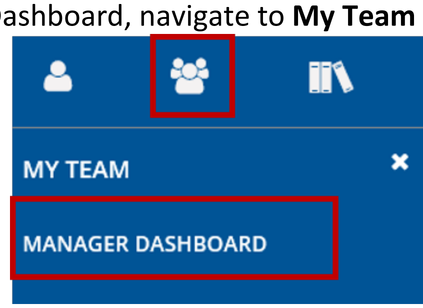
Review Training Timeline and Transcripts of Employees

1. From the **Exception Report** window, select the **Profile** button. The user's **Timeline** opens to show the list of training the user has registered for, is in progress, or has been assigned to complete.

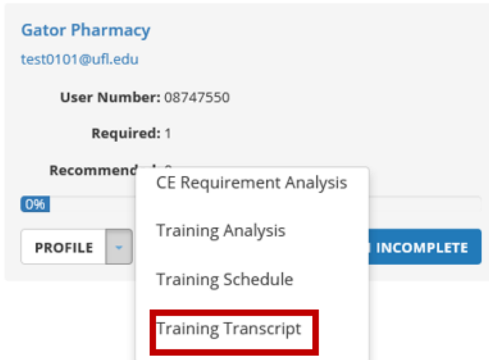




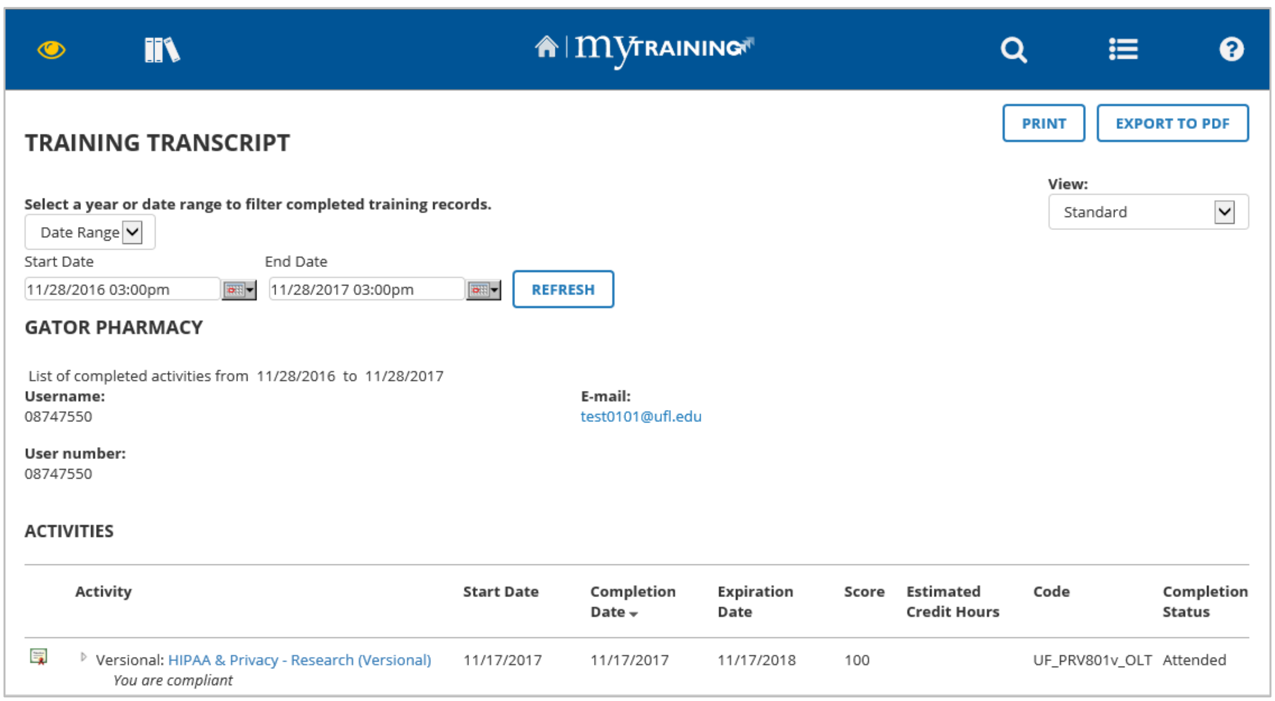
2. To return to the Manager Dashboard, navigate to **My Team > Manager Dashboard**.



3. To view a user's **Training Transcript**, click the Profile dropdown arrow and select **Training Transcript**.



4. You will now launch **Emulation mode** to navigate to the user's **Training Transcript** page. While on this page, you can review a list of completed Activities, Completion and Expiration Dates, Scores, Activity Codes, Start Dates, and Activity Diplomas (if applicable).



NOTE: To download a user's Activity Diploma, or certificate, do this:

- Click on the diploma icon to the left of the title.
- Click either the **Print** or **Export to PDF**.
- When done select **Close**.

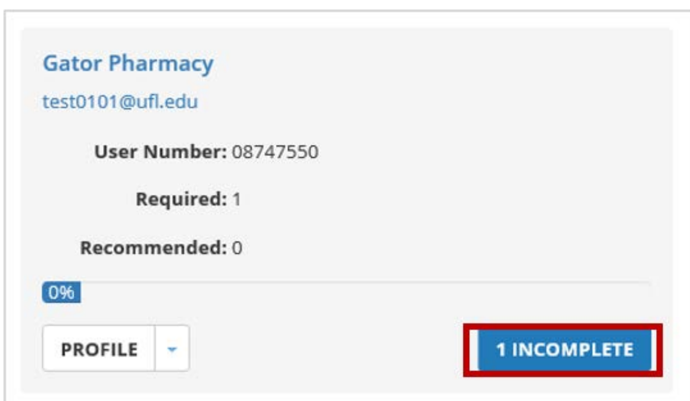
5. To exit out of emulation, click the **Eye** icon at the top left of the page, then select **Exit Emulation**.

6. You are now back on your own training view. To verify, click the **Self** icon and verify your name appears.

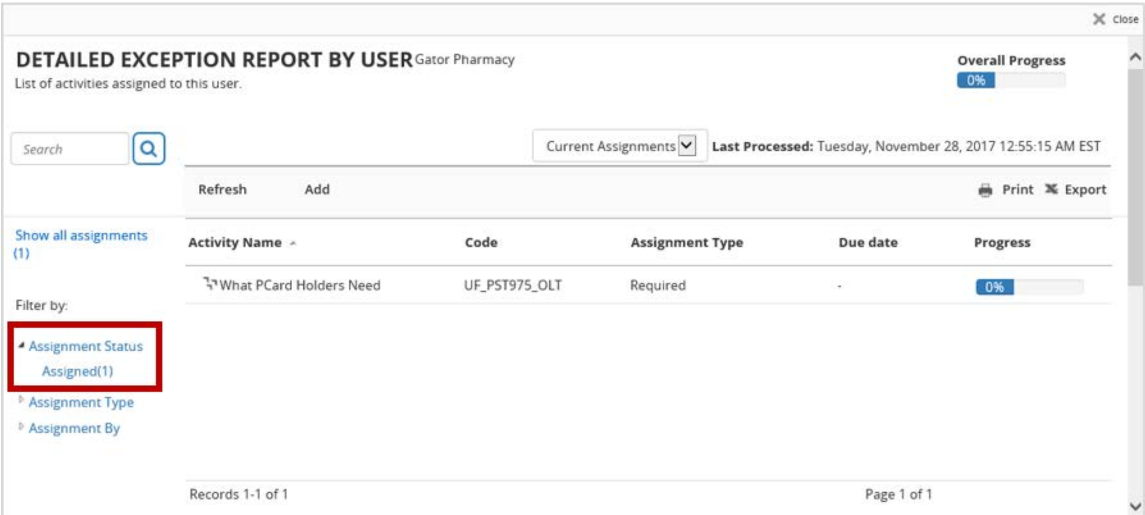
Review Incomplete Assignments

1. From the **Exception Report** window, select the **Incomplete** button to view a user's incomplete and overdue activities.

   NOTE: The button shows the number of incomplete activities on the left.

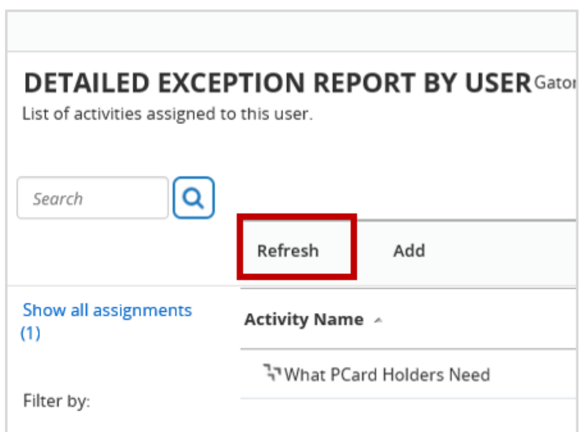


2. In the **Detailed Exception Report by User** window, the **Assignment Status** dropdown list includes links to **Assigned** and **Overdue** activities, if applicable.



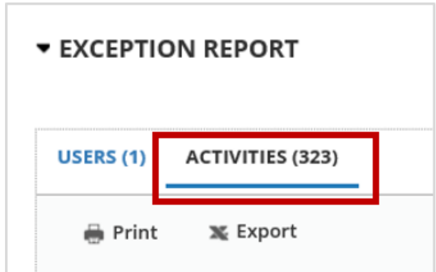
3. Other available filters include the option to view the **Assignment Type** and the **Assignment By** for any of the listed activities.

   NOTE: If a learner completed an assignment the same day that you are reviewing the report, you will need to **Refresh** the window.



Assigning Training to Others

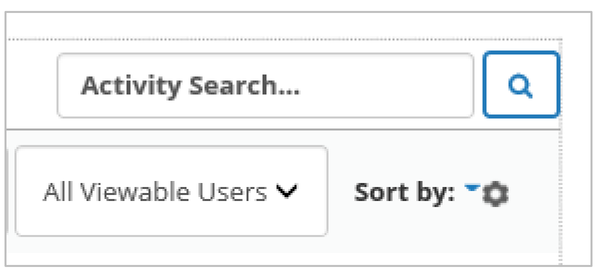
1. From the **Exception Report** window, select the **Activities** tab.



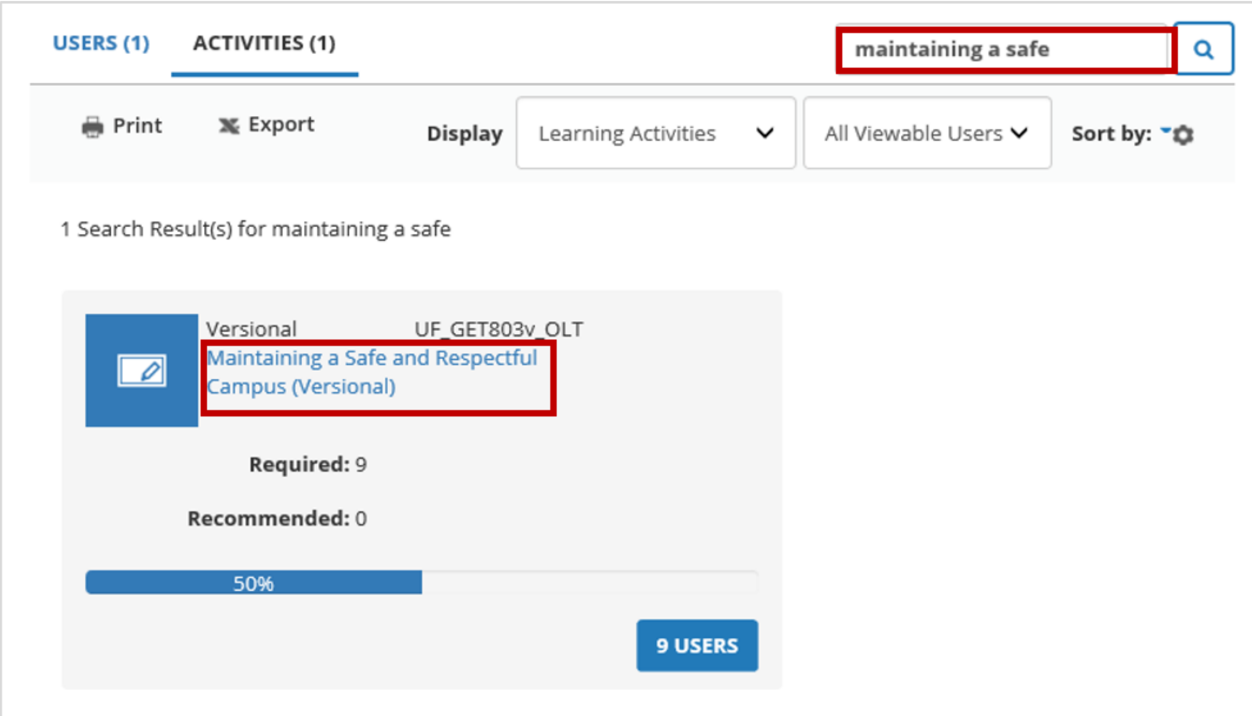
2. Select the dropdown arrow next to Direct Reports and select **All Viewable Users**.

3. Search for the learning activity using the **Activity Search** box with either the Activity Name, Activity Code, or a word from the activity description.

   NOTE: If the training was hidden by the activity author, you will need to contact the activity owner to request assistance. If you do not know who owns the course, please contact Training and Organizational Development at training@ufl.edu.

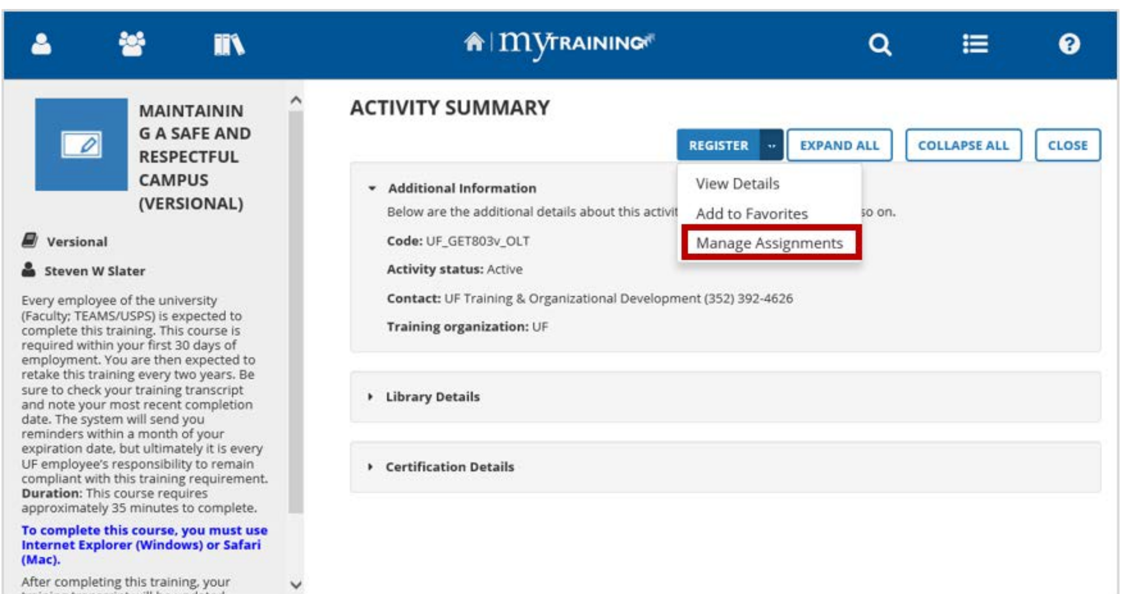


4. In the example below, searching for the keywords “**Maintaining a Safe**” returns one training titled “**Maintaining a Safe and Respectful Campus**.” Select the course title.

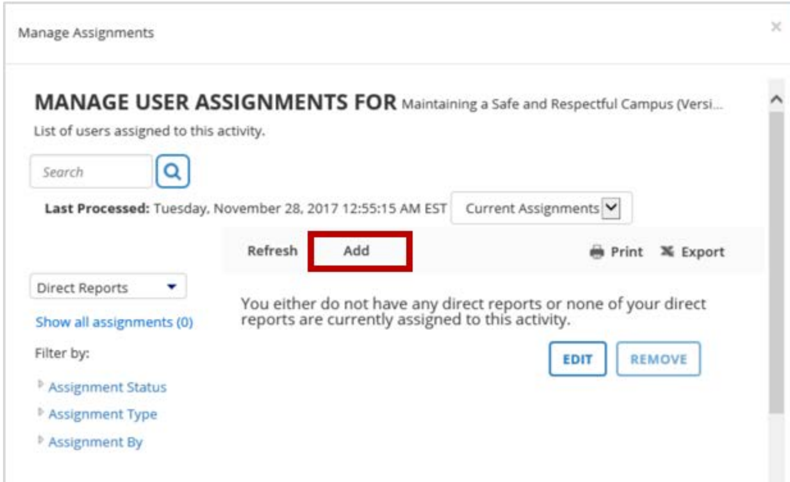


5. From the Activity Summary page click the **Register** dropdown menu for the course and select **Manage Assignments**.

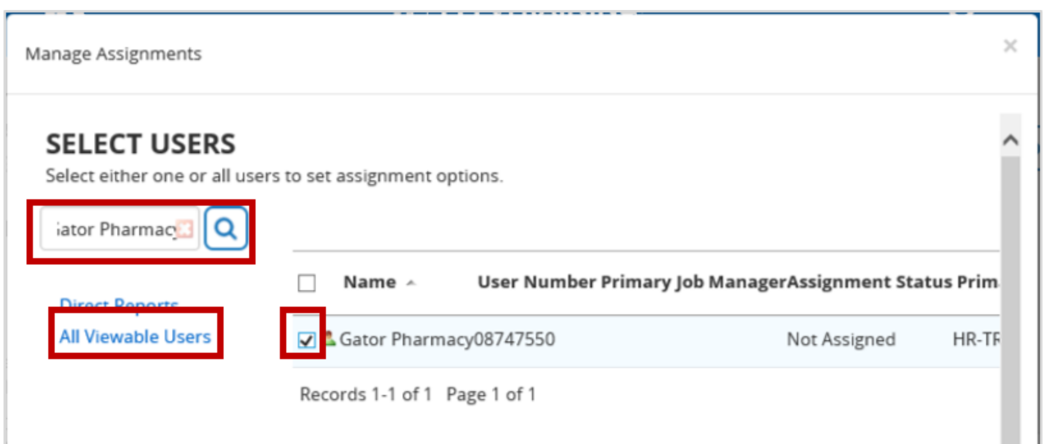
   NOTE: **<u>Do not</u>** select the **Register** button or you will register yourself for the selected training.



6. Select **Add**.



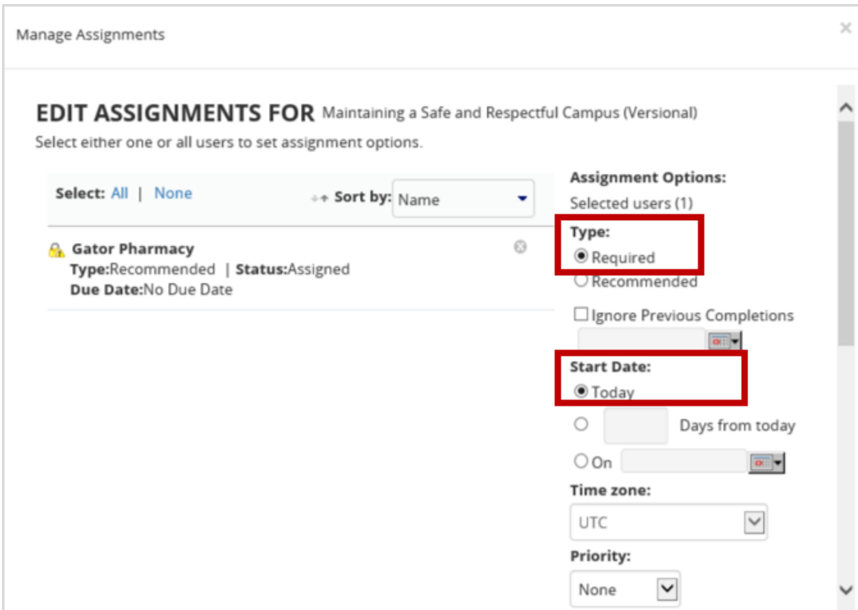
7. Select **All Viewable Users**.
   a. To select one user:
      - Add check to box.
   b. To select multiple users:
      - Enter name in Search box and hit Enter on keyboard.
      - Add check to box.
      - Repeat the first two steps for each user to add.

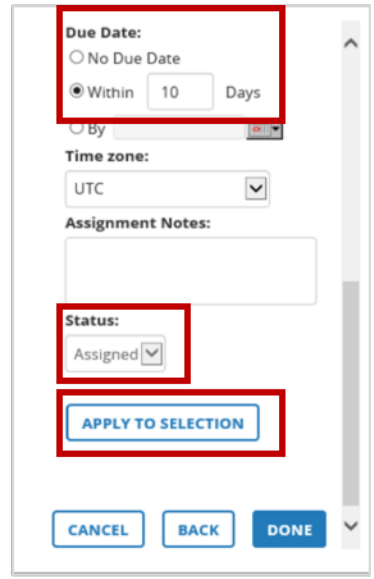


8. Scroll to the bottom of the window and select **Next.**

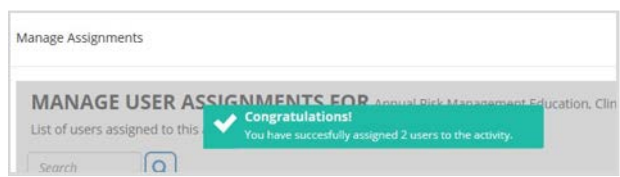
9. Select the user name and change settings in the **Assignment Options** if desired. You can identify this assignment as **Required or Recommended**, provide assignment **Start Date**, and list a completion **Due Date**.

   NOTE: To give the same assignment options to all users, select **All** in blue text above the first name.





10. Select **Apply to Selection** to save edits.
11. Select **Done**.
12. A **Congratulations** pop up notice of the successful assignment appears.



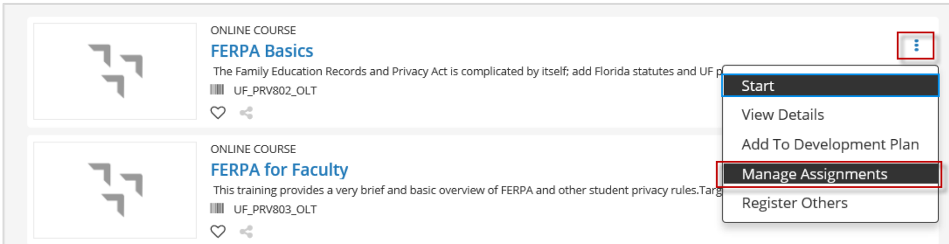
NOTE: If an assignment was assigned in error, contact the Training and Organizational Development department at training@ufl.edu or 352-392-4626 to request removal.

Assign Training to Employees via Search

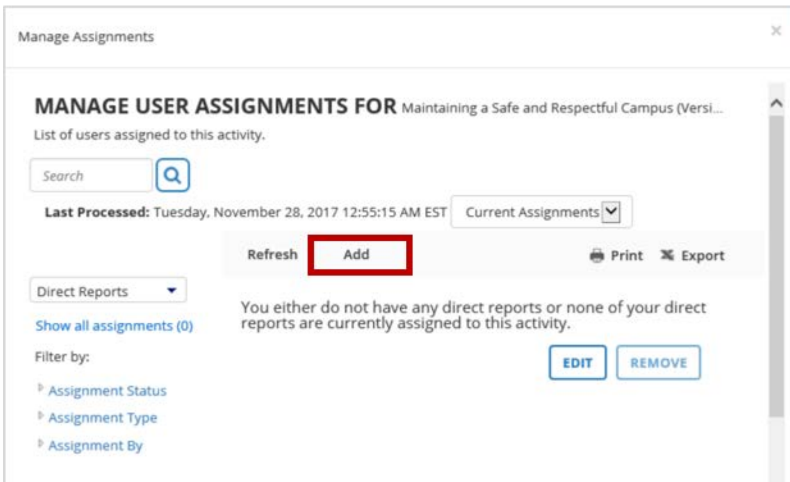
There may be a time when you will assign a new training that has not been assigned to any of your direct or indirect reports. In this case the training can only be assigned via the Search function.

1. From the myTraining Home page, select **Activity Search** in the Quick Links section or the **Search** icon on the Banner.
2. Enter in the search criteria in the Search textbox and click **magnify lens icon**.

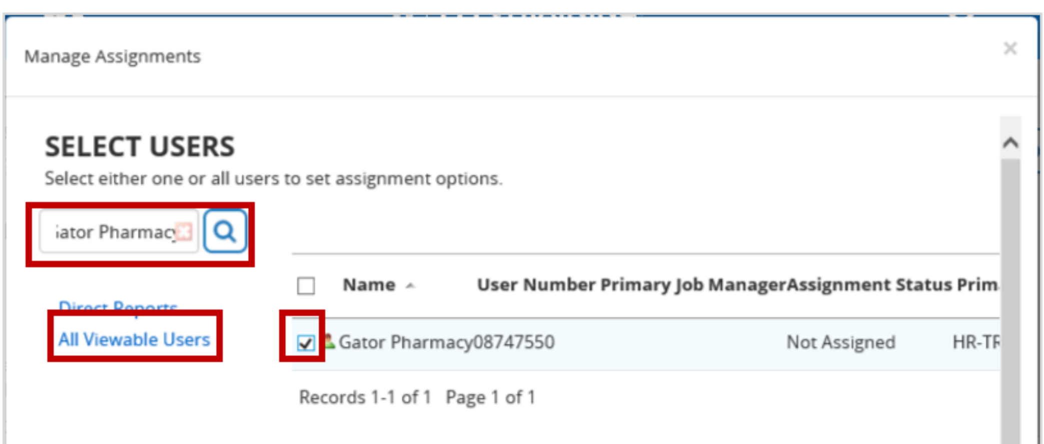
3. To the far right of the listing, click on the three dots. From the drop-down menu select **Manage Assignments**.



4. Select **Add**.



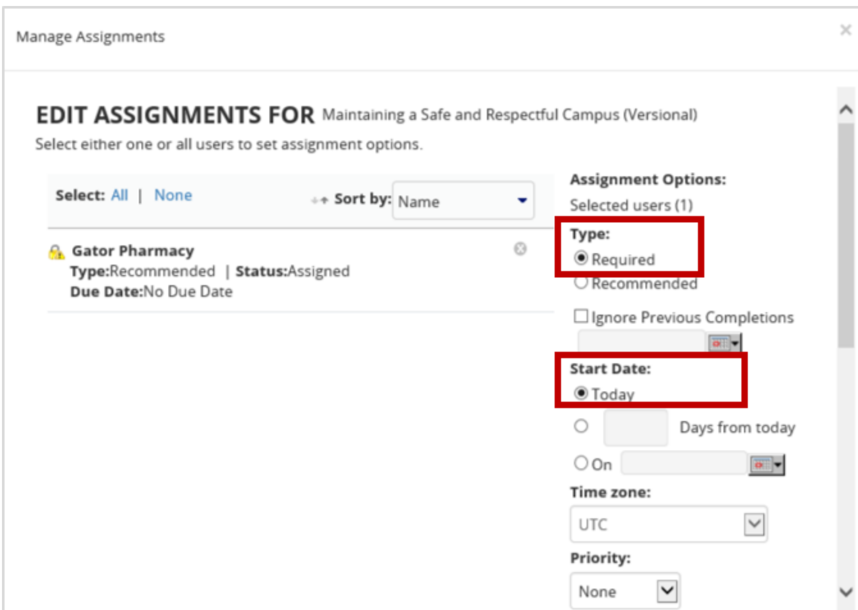
5. Select **All Viewable Users**.
   a. To select one user:
      - Add check to box.
   b. To select multiple users:
      - Enter name in Search box and hit Enter on keyboard.
      - Add check to box.
      - Repeat the first two steps for each user to add.

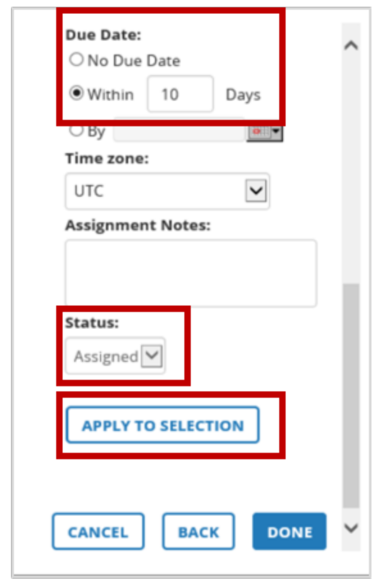


6. Scroll to the bottom of the window and select **Next.**

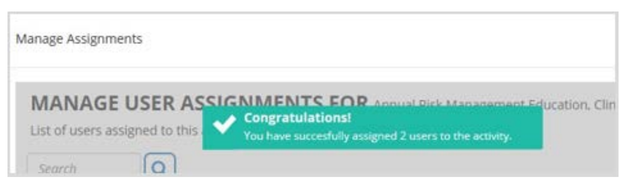
7. Select the user name and change settings in the **Assignment Options** if desired. You can identify this assignment as **Required or Recommended**, provide assignment **Start Date**, and list a completion **Due Date**.

   NOTE: To give the same assignment options to all users, select **All** in blue text above the first name.





8. Select **Apply to Selection** to save edits.
9. Select **Done**.
10. A **Congratulations** pop up notice of the successful assignment appears.

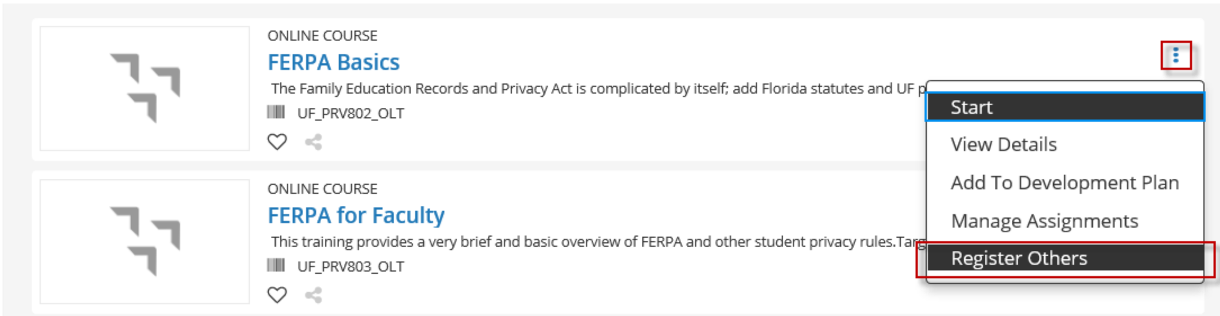


NOTE: If an assignment was assigned in error, contact the Training and Organizational Development department at training@ufl.edu or 352-392-4626 to request removal.

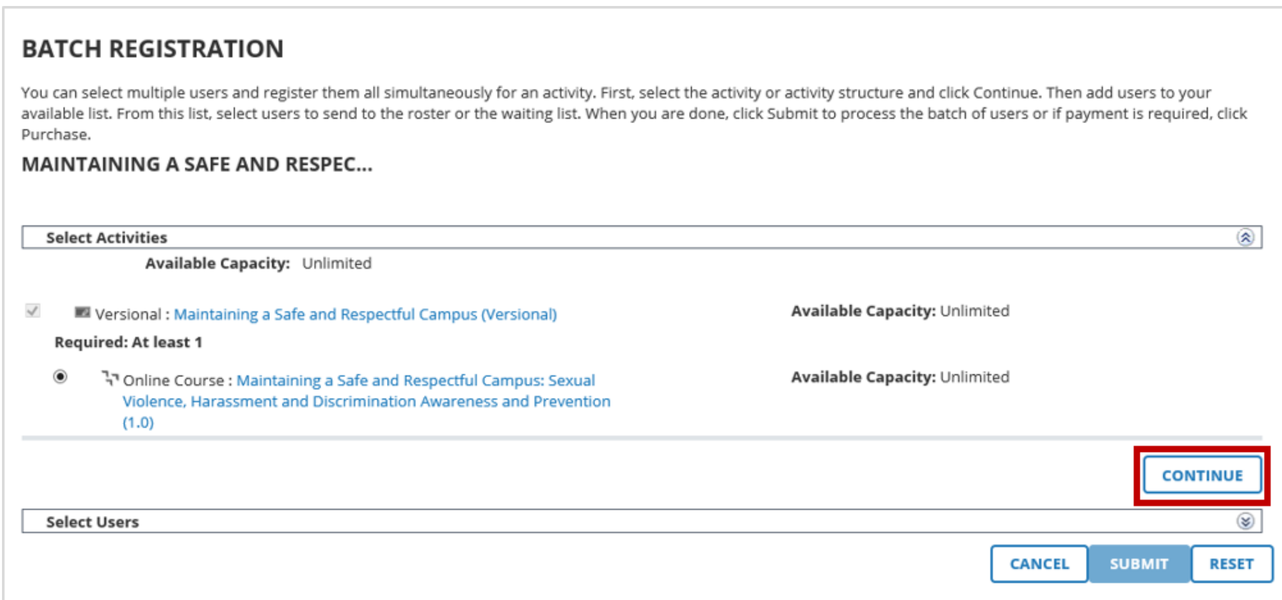
Register Employees for Training

1. From the myTraining Home page, select **Activity Search** in the Quick Links section or the **Search** icon on the Banner.
2. Enter in the search criteria in the Search textbox and click **magnify lens icon**.

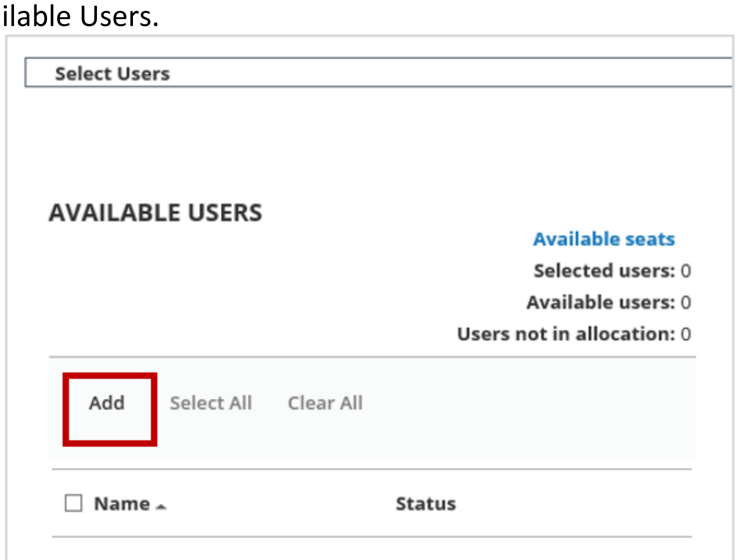
3. To the far right of the listing, click on the three dots and select **Register Others**. The Batch Registration page opens.



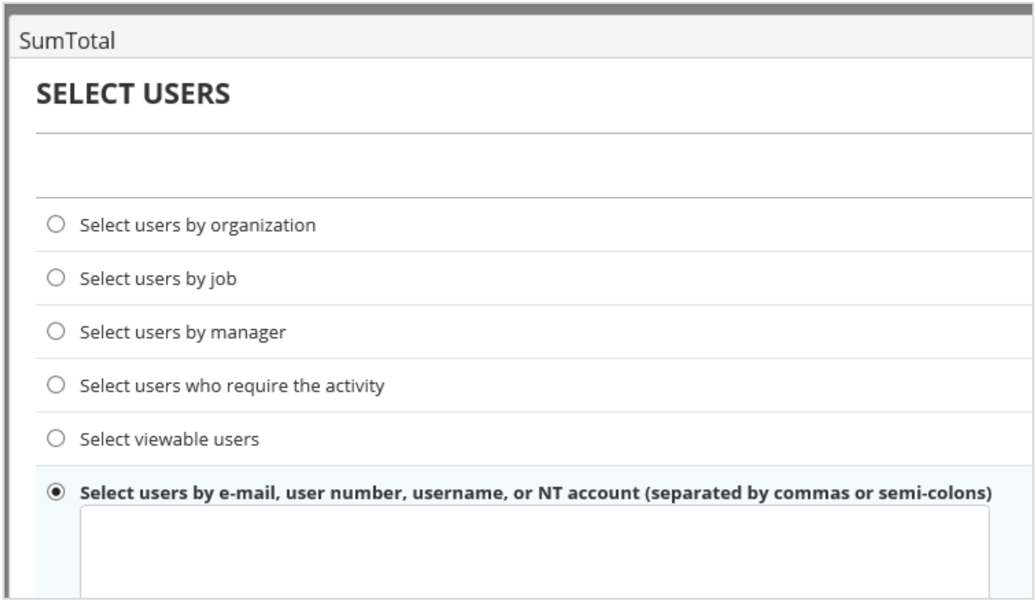
4. Select **Continue**.



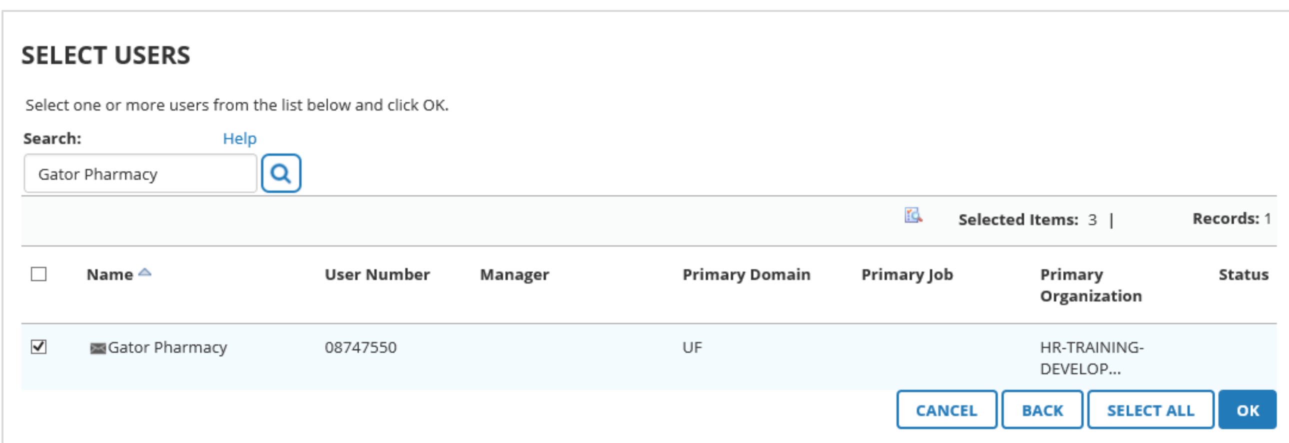
5. Select **Add** under Available Users.



6. There are different options for selecting users. We recommend to select the radio button for either **Select users by Organization**, **Select viewable users**, or **Select users by e-mail, user number, username, or NT account**.

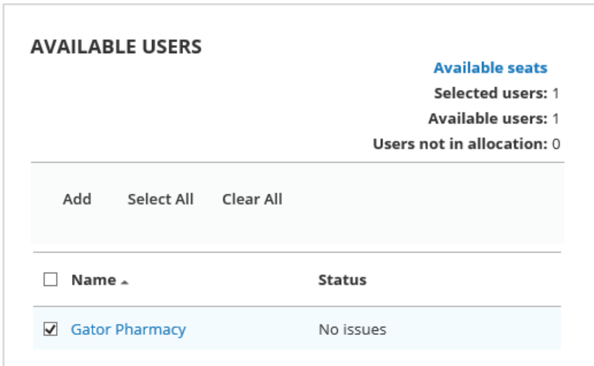


7. Scroll to the bottom of the box and select **Next**. The Select Users page opens.
8. Add a check to the box to select users.

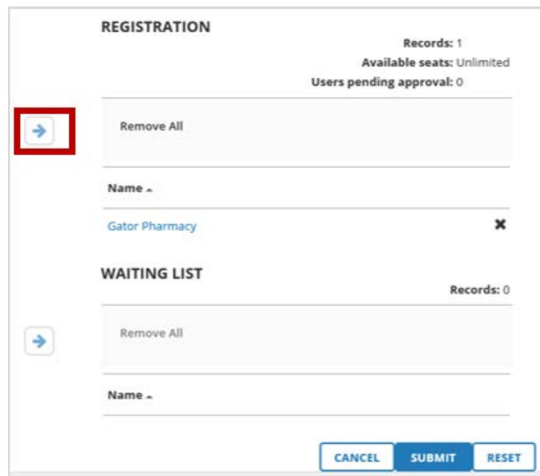


9. Select **Ok**.

10. All users in this organization will appear in the **Available Users** section. It may take a couple of minutes for the system to process all the names.
    a. From here you can remove names not needed.
    b. You can go back and add names from another department.



11. Once all users are selected, select the arrow to move them to Registration.
12. Select **Submit**. All users are now registered for the training.



For additional help, please contact UF Training and Organizational Development at (352)-392-4626.