

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](#)

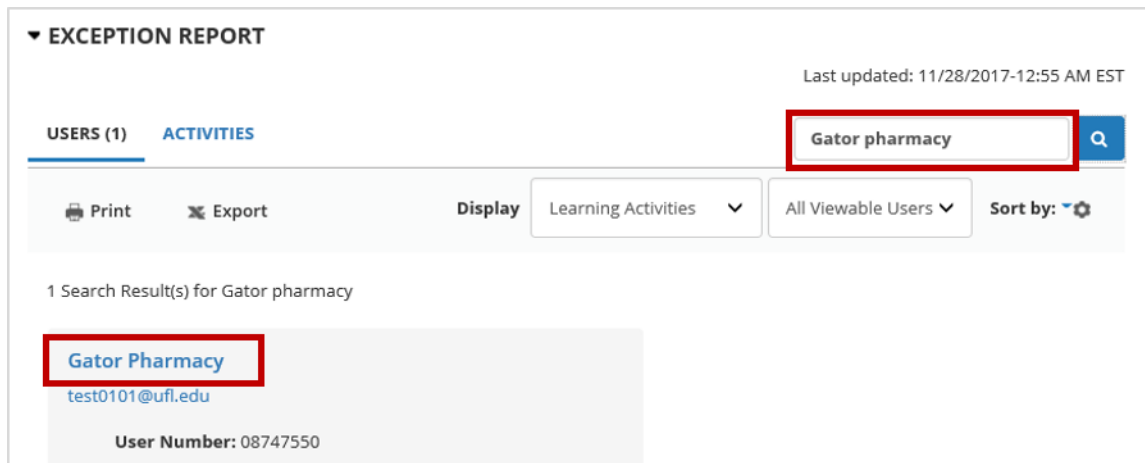
NOTE: The UF_N_EL_PROXY role is required to complete these functions.

Log in to myTraining and Access the Manager Dashboard

1. Log in to myTraining.
2. Navigate to **My TEAM drop down > Manager Dashboard**. The Exception Report page opens.
3. Select the dropdown arrow next to Direct Reports and select All Viewable Users.

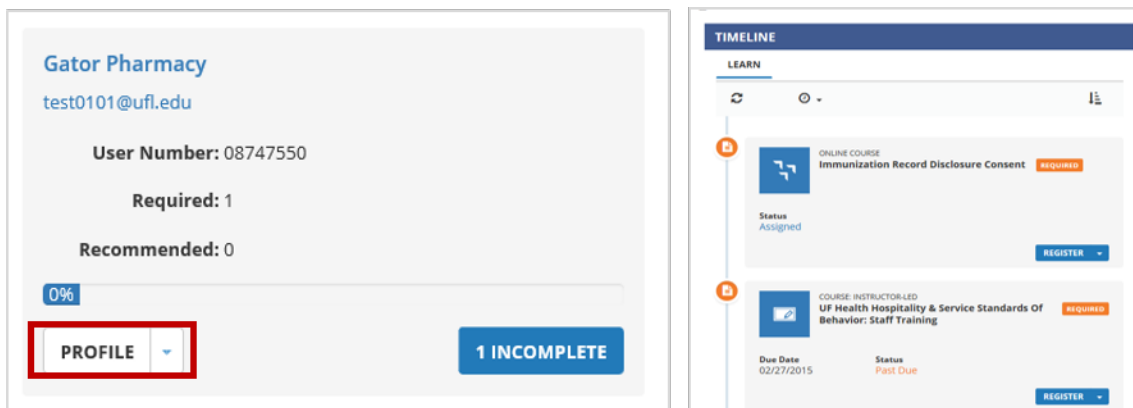


4. All learners who are members of the department(s) that you have access to manage will be grouped together in this view. This list of users can be rather large depending on your provisioned access in myTraining.
5. Locate the **user** – OR- Enter the **UF ID** or **name** in the User Search box and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

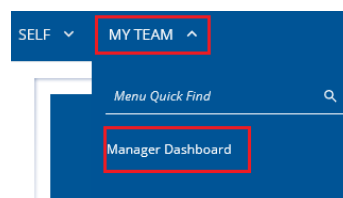


Review Training Timeline and Transcripts of Employees

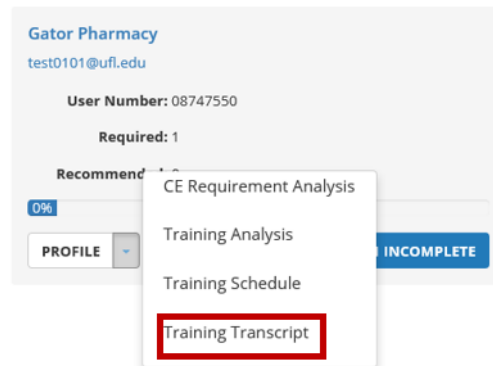
1. From the **Exception Report** window, select the **Profile** button. The user's **Timeline** opens to show the list of training the user has registered for, is in progress, or has been assigned to complete.



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



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



- Clicking **Training Transcript** will 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).

myTRAINING® SELF ▾ Learning Search ? [User Icon]

You are emulating Gator Pharmacy's account. To end emulation mode, click Exit Emulation. **EXIT EMULATION X**

TRAINING TRANSCRIPT **PRINT** **EXPORT TO PDF**

Select a year or date range to filter completed training records.

Date Range ▾

Start Date: 11/23/2020 10:25am End Date: 11/23/2021 10:25am **REFRESH**

GATOR PHARMACY

List of completed activities from 11/23/2020 to 11/23/2021

Username: 08747550 **E-mail:** training@ufl.edu

User number: 08747550

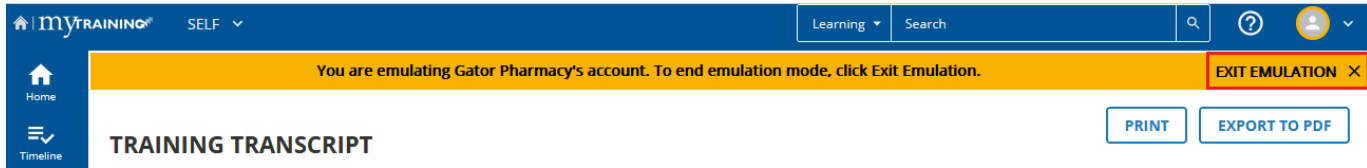
ACTIVITIES

Activity	Start Date	Completion Date ▾	Expiration Date	Score	Estimated Credit Hours	Code	Completion Status
Online Course: Faculty Search Committee Tutorial	3/22/2021	3/22/2021	3/22/2023			UF_PVO800_OLT	Attended

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

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

5. To exit out of emulation, click the **Exit Emulation X** at the top right of the page.

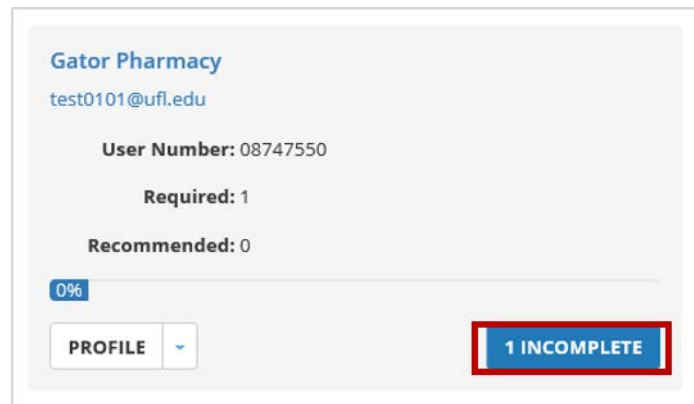


6. You are now back on your own training view. To verify, click the **Drop down next** to the picture on the top right corner of the screen and verify your name appears

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.

DETAILED EXCEPTION REPORT BY USER Gator Pharmacy

List of activities assigned to this user.

Overall Progress: 0%

Search [] Current Assignments [v] Last Processed: Tuesday, November 28, 2017 12:55:15 AM EST

Refresh Add Print Export

Activity Name	Code	Assignment Type	Due date	Progress
What PCard Holders Need	UF_PST975_OLT	Required	-	0%

Filter by:

- Assignment Status (Assigned(1))
- Assignment Type
- Assignment By

Records 1-1 of 1 Page 1 of 1

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.

DETAILED EXCEPTION REPORT BY USER Gator Pharmacy

List of activities assigned to this user.

Search []

Refresh Add

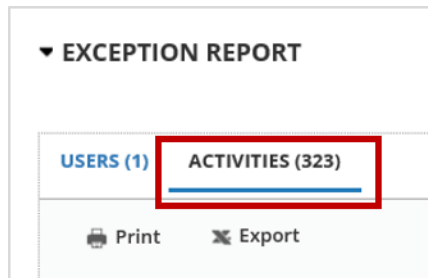
Show all assignments (1)

Activity Name
What PCard Holders Need

Filter by:

Assigning Training to Others

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

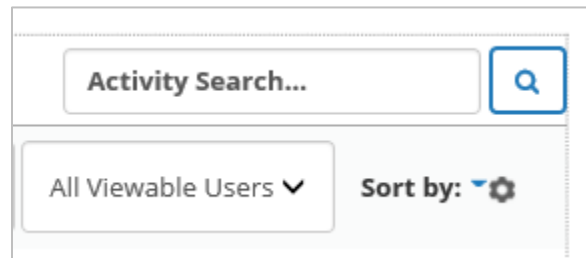


2. Select the dropdown arrow next to Direct Reports and select **All Viewable Users**.



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.



- 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.

The screenshot shows the 'ACTIVITIES (1)' tab in the Manager Dashboard. A search bar at the top right contains the text 'maintaining a safe'. Below the search bar, there are buttons for 'Print', 'Export', and 'Display'. A dropdown menu for 'Learning Activities' is set to 'Learning Activities', and another dropdown for 'All Viewable Users' is set to 'All Viewable Users'. A 'Sort by' button with a gear icon is also present. The search results section shows '1 Search Result(s) for maintaining a safe'. The result is a card for a 'Versional' activity titled 'Maintaining a Safe and Respectful Campus (Versional)' with the code 'UF_GET803v OLT'. It indicates 'Required: 9' and 'Recommended: 0' users, with a progress bar at 50%. A blue button at the bottom right of the card says '9 USERS'.

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

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

The screenshot shows the 'ACTIVITY SUMMARY' page for the course 'MAINTAINING A SAFE AND RESPECTFUL CAMPUS'. The course is 'Versional' and created by 'Steven W Slater'. The course description states: 'UF actively promotes equal opportunity policies and practices to prevent sexual discrimination and harassment. This commitment applies to all students and employees and reflects the University's belief that education and employment decisions and access to University activities should be based on individuals' abilities and qualifications and not on irrelevant factors, as well as that the University values broad diversity within our community and is committed to diversity and eliminating discriminating. To support UF's vision of an academic and work environment free of discrimination, UF requires completion of the online training program Maintaining a Safe and Respectful'. The 'REGISTER' dropdown menu is open, showing options: 'View Details', 'Add to Favorites', and 'Manage Assignments' (which is highlighted with a red box). Other buttons include 'EXPAND ALL', 'COLLAPSE ALL', and 'CLOSE'. The page also shows sections for 'Library Details' and 'Certification Details'.

6. Select **Add**.

The screenshot shows the 'Manage Assignments' window. At the top, it says 'MANAGE USER ASSIGNMENTS FOR Maintaining a Safe and Respectful Campus (Versi...'. Below this, it says 'List of users assigned to this activity.' There is a search box with a magnifying glass icon. Below the search box, it says 'Last Processed: Tuesday, November 28, 2017 12:55:15 AM EST' and 'Current Assignments' with a dropdown arrow. There are buttons for 'Refresh', 'Add' (highlighted with a red box), 'Print', and 'Export'. Below these buttons, there is a 'Direct Reports' dropdown and a message: 'You either do not have any direct reports or none of your direct reports are currently assigned to this activity.' There are also 'EDIT' and 'REMOVE' buttons. At the bottom, there is a 'Filter by:' section with options for 'Assignment Status', 'Assignment Type', and 'Assignment By'.

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.

The screenshot shows the 'Manage Assignments' window with the 'SELECT USERS' section. It says 'Select either one or all users to set assignment options.' There is a search box with 'iator Pharmacy' and a magnifying glass icon. Below the search box, there is a link for 'All Viewable Users' (highlighted with a red box). To the right, there is a table with columns: 'Name', 'User Number', 'Primary Job Manager', 'Assignment Status', and 'Prim'. The table has one row: 'Gator Pharmacy08747550' with a checked checkbox in the first column, 'Not Assigned' in the 'Assignment Status' column, and 'HR-TR' in the 'Prim' column. At the bottom, it says 'Records 1-1 of 1 Page 1 of 1'.

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

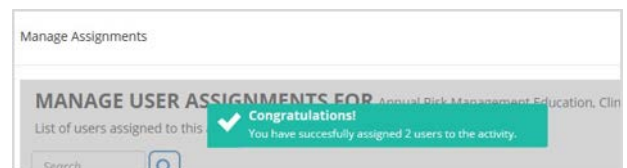
The screenshot shows the bottom of the window with two buttons: 'CANCEL' and 'NEXT' (highlighted with a red box). There is a vertical scrollbar on the right side of the window.

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.

The screenshot shows the 'Manage Assignments' window. On the left, under 'EDIT ASSIGNMENTS FOR Maintaining a Safe and Respectful Campus (Versional)', there is a list of users. The first user, 'Gator Pharmacy', is selected. To the right of the user list, the 'Assignment Options' section is visible. Red boxes highlight the 'Type' dropdown (set to 'Required'), the 'Start Date' dropdown (set to 'Today'), and the 'Due Date' dropdown (set to 'Within 10 Days'). Below these, the 'Status' dropdown is set to 'Assigned'. At the bottom right, the 'APPLY TO SELECTION' button is highlighted with a red box. Other buttons like 'CANCEL', 'BACK', and 'DONE' are also visible.

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



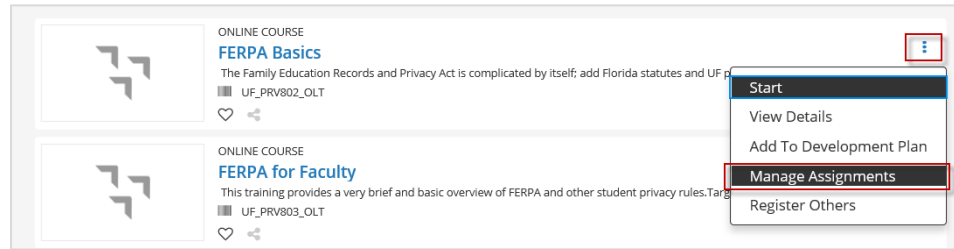
NOTE: If an assignment was assigned in error, contact the Training and Organizational Development department at training@ufl.edu or 352-392-4626 to request removal.

Assign Training to Employees via Search

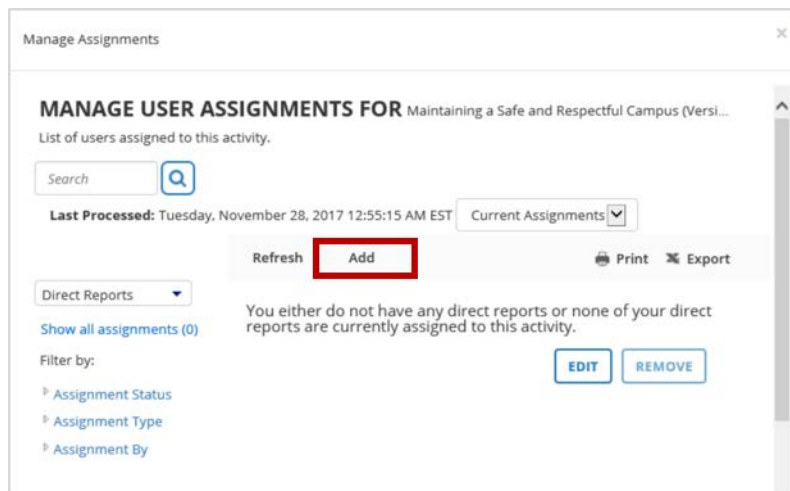
There may be a time when you will assign a new training that has not been assigned to any of your direct or indirect reports. In this case the training can only be assigned via the Search function.

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**.

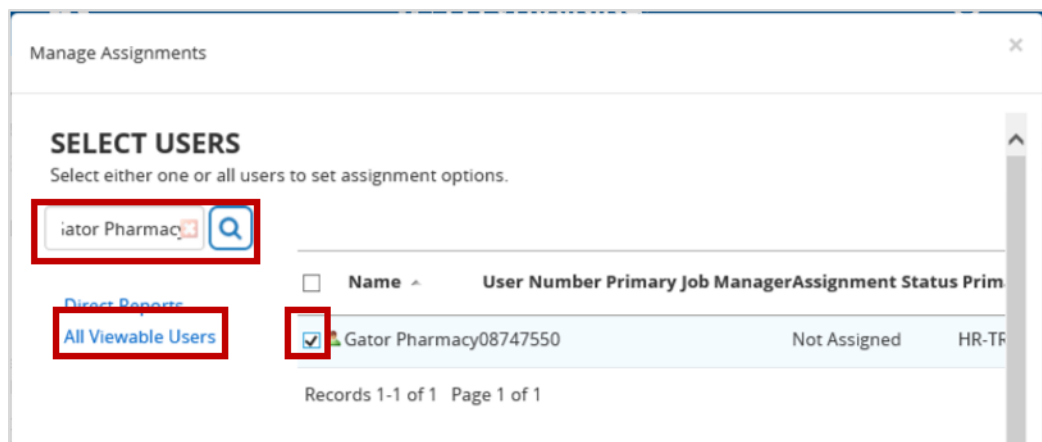
3. To the far right of the listing, click on the three dots. From the drop-down menu select **Manage Assignments**.



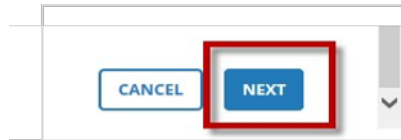
4. Select **Add**.



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.

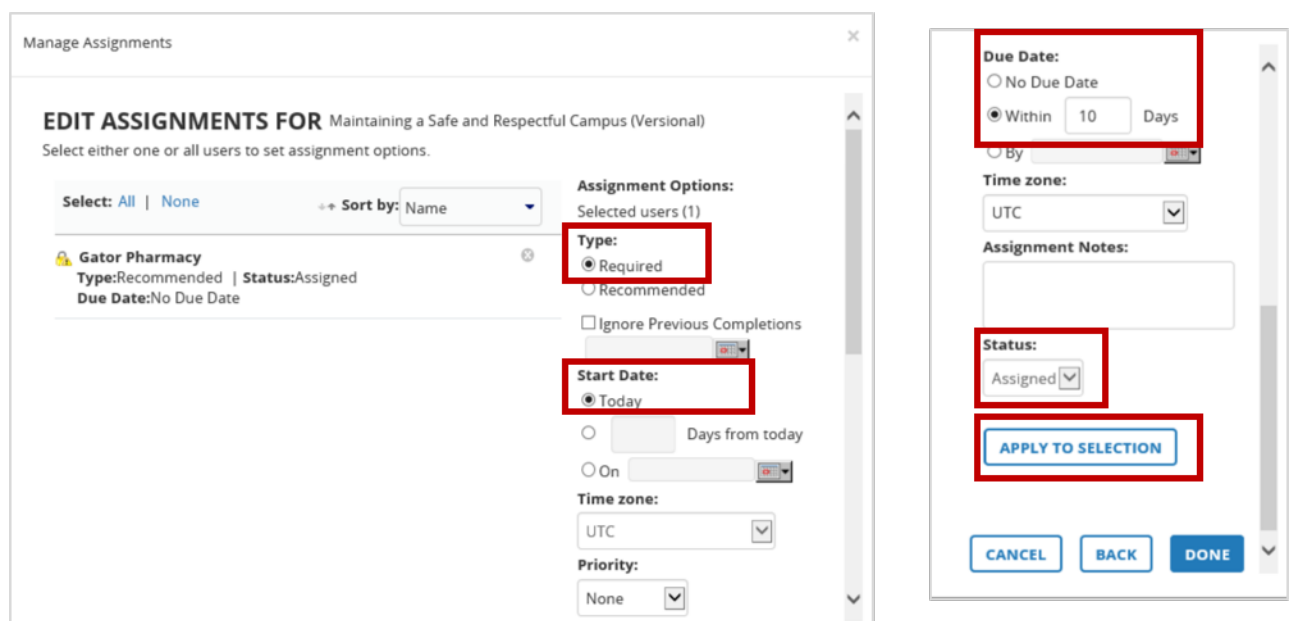


6. Scroll to the bottom of the window and select **Next**.

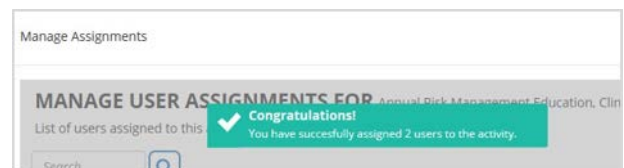


7. Select the user name and change settings in the **Assignment Options** if desired. You can identify this assignment as **Required** or **Recommended**, provide assignment **Start Date**, and list a completion **Due Date**.

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.

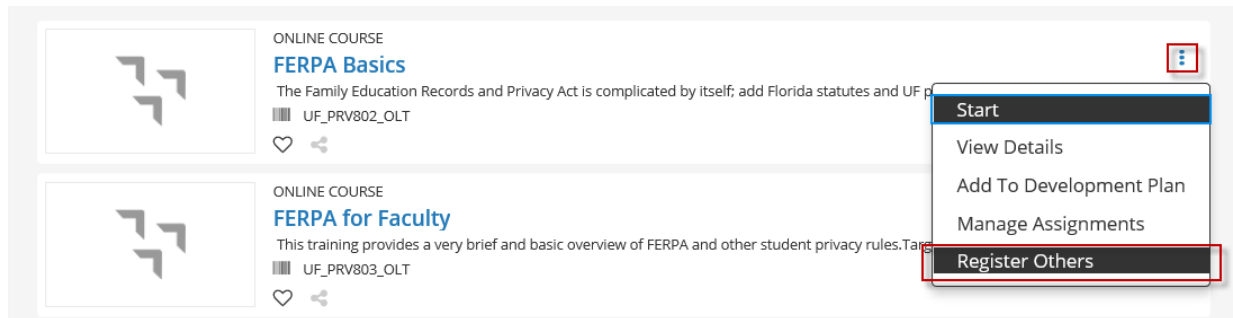


NOTE: If an assignment was assigned in error, contact the Training and Organizational Development department at training@ufl.edu or 352-392-4626 to request removal.

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**.

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



- Select **Continue**.

BATCH REGISTRATION

You can select multiple users and register them all simultaneously for an activity. First, select the activity or activity structure and click Continue. Then add users to your available list. From this list, select users to send to the roster or the waiting list. When you are done, click Submit to process the batch of users or if payment is required, click Purchase.

MAINTAINING A SAFE AND RESPEC...

Select Activities ⌵

Available Capacity: Unlimited

☒ Versional : Maintaining a Safe and Respectful Campus (Versional) Available Capacity: Unlimited
Required: At least 1

☒ Online Course : Maintaining a Safe and Respectful Campus: Sexual Violence, Harassment and Discrimination Awareness and Prevention (1.0) Available Capacity: Unlimited

CONTINUE

Select Users ⌵

CANCEL SUBMIT RESET

- Select **Add** under Available Users.

Select Users

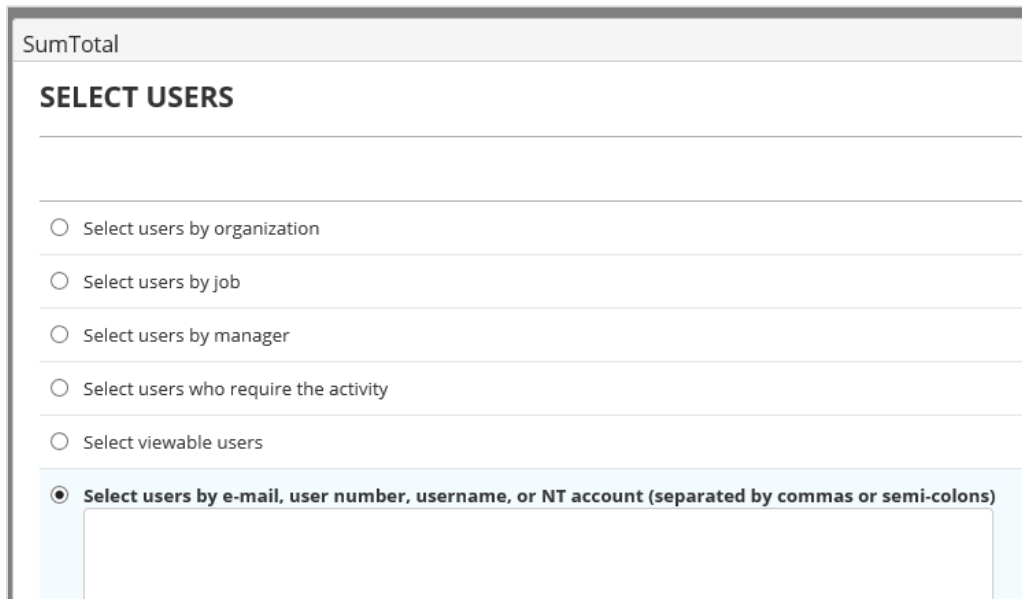
AVAILABLE USERS

Available seats
Selected users: 0
Available users: 0
Users not in allocation: 0

Add Select All Clear All

☐ Name ⌵ Status

- 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**.

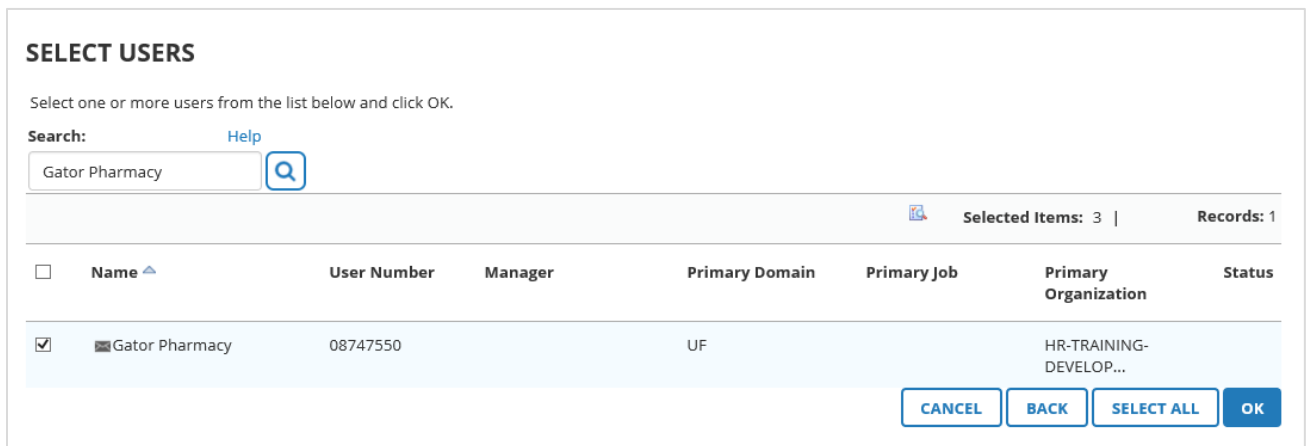


SumTotal

SELECT USERS

☐ Select users by organization
☐ Select users by job
☐ Select users by manager
☐ Select users who require the activity
☐ Select viewable users
☒ **Select users by e-mail, user number, username, or NT account (separated by commas or semi-colons)**

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



SELECT USERS

Select one or more users from the list below and click OK.

Search: [Help](#)

Gator Pharmacy

Selected Items: 3 | Records: 1

<input type="checkbox"/>	Name	User Number	Manager	Primary Domain	Primary Job	Primary Organization	Status
<input checked="" type="checkbox"/>	Gator Pharmacy	08747550		UF		HR-TRAINING-DEVELOP...	

- 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.

The screenshot shows the 'AVAILABLE USERS' section. At the top right, it displays 'Available seats' in blue, followed by 'Selected users: 1', 'Available users: 1', and 'Users not in allocation: 0'. Below this is a table with three buttons: 'Add', 'Select All', and 'Clear All'. The table has two columns: 'Name' and 'Status'. One user is listed: 'Gator Pharmacy' with a status of 'No issues'. A checkbox is checked next to the user name.

Name	Status
<input checked="" type="checkbox"/> Gator Pharmacy	No issues

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.

The screenshot shows the 'REGISTRATION' section. At the top right, it displays 'Records: 1', 'Available seats: Unlimited', and 'Users pending approval: 0'. Below this is a 'Remove All' button. The 'Name' column shows 'Gator Pharmacy' with a blue arrow icon next to it. Below this is a 'WAITING LIST' section with 'Records: 0' and a 'Remove All' button. At the bottom, there are three buttons: 'CANCEL', 'SUBMIT', and 'RESET'. A red box highlights the blue arrow icon next to the 'Gator Pharmacy' name.

Name
Gator Pharmacy

WAITING LIST

Name

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