

Manager Self Service

**Managing Direct
and Indirect Reports:
Core HR, Absence, and
Learning**



Before we begin...

The following guidelines will support a successful learning experience.



Check-In for Attendance



Refrain from side-conversations



Silence cell phones



Check E-mail during breaks ONLY



Complete post-training survey
prior to leaving this session



Enjoy!

Training Icons

Throughout training, you will come across the following icons:



Instructor Demos: View a live demonstration of the system functionality



Important: Emphasizes information that can impact how you handle a specific area



Remember: Reminds you about previous important information



Quick Tip: Provides extra instructions intended to give immediate, practical advice



Take Note: Recommends that you take note of information needed for future activities



System Exercises: Indicates that you will be participating in a group or paired activity



Repeat Steps : Indicates a time in which previous steps you learned will be repeated related to accomplish a new objective



Knowledge Checks: Test your knowledge of key concepts

Course Overview

Welcome to the first training session within the Manager Self Service Course. This course is designed to provide DeKalb County Managers with an overview of how to perform general functions within CV360.

Who should take this course?

- General DeKalb County Managers
- Line Managers
- HR Administrators and Supervisors



Prerequisites:

- We recommend the following prerequisites before taking this course:
- CV360 Navigation Training



Duration:

3 Hours



Course Objectives:

Upon the completion of the Manager Self Service course, you will be able to:

Objectives

Upon completion you will be able to:

- Complete Manager self-service functions within CV360
- View Employee Information, Manage Absences and Learning for Direct Reports

Course Agenda

Below is a list of the lessons within this course as well as an estimated duration of each

#	Manager Self Service	Duration
1	View Direct Reports (Core HR)	15 Minutes
2	View Direct and Indirect Report Hierarchy (Core HR)	15 Minutes
3	Change Location (Core HR)	15 Minutes
4	View Document Records (Core HR)	15 Minutes
5	View Employment Information (Core HR)	15 Minutes
6	View Direct Report Salary and Allowance Details (Core HR)	15 Minutes
7	Create a Delegation Rule for Approvals (Core HR)	15 Minutes
8	View Team Representatives (Core HR)	15 Minutes
9	Approve/Reject a Time Off Request (Absence)	15 Minutes
10	View an Employee's Existing Leave Balances (Absence)	15 Minutes
11	Request Absence on Behalf of an Employee (Absence)	15 Minutes
12	View an Employee's Existing Absences (Absence)	15 Minutes
13	Create a Delegation for Absence Approvals (Absence)	15 Minutes

Course Agenda

Below is a list of the lessons within this course as well as an estimated duration of each

#	Manager Self Service	Duration
14	Recommend Learnings (Learning)	15 Minutes
15	Assign Learnings (Learning)	
16	Request Non-Catalog Learning Item (Learning)	15 Minutes
17	View Learning Status (Learning)	15 Minutes

Managing Direct and Indirect Reports

Lesson 1: View Direct Reports (Core HR)

Lesson Objective:

Upon the completion of the View Direct Reports Lesson, you will be able to:

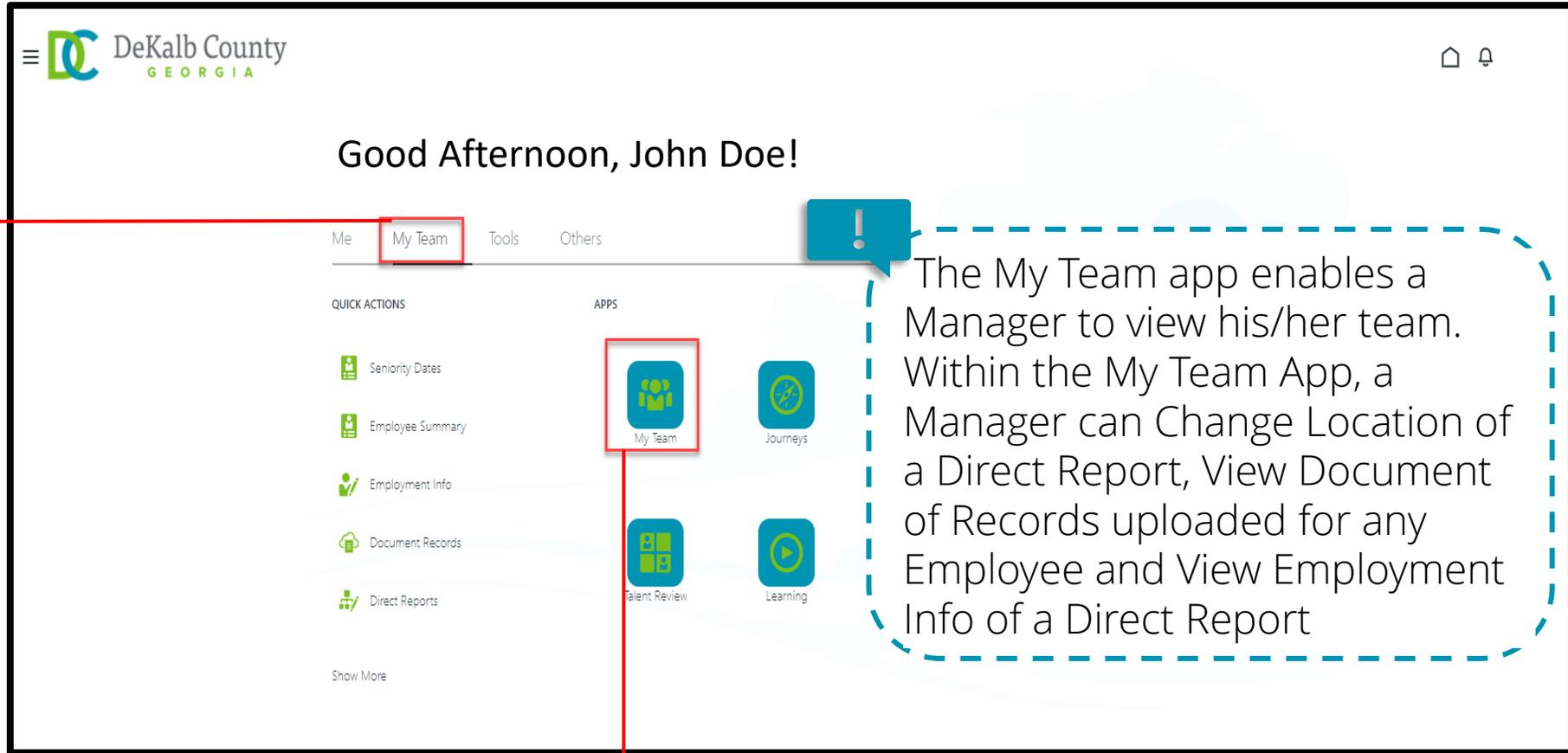
Objective

- View Direct Reports

View Direct Reports

1

Select the **My Team** tab from the CV360 Homepage



The screenshot shows the DeKalb County Georgia CV360 homepage. At the top left is the DeKalb County logo. The main header says "Good Afternoon, John Doe!". Below this is a navigation bar with tabs: "Me", "My Team", "Tools", and "Others". The "My Team" tab is highlighted with a red box. Below the navigation bar are two sections: "QUICK ACTIONS" and "APPS". The "QUICK ACTIONS" section includes links for "Seniority Dates", "Employee Summary", "Employment Info", "Document Records", and "Direct Reports". The "APPS" section includes tiles for "My Team", "Journeys", "Talent Review", and "Learning". The "My Team" tile in the "APPS" section is highlighted with a red box. A blue speech bubble with an exclamation mark points to the "My Team" tile. A dashed blue box encloses the text on the right side of the slide.

The My Team app enables a Manager to view his/her team. Within the My Team App, a Manager can Change Location of a Direct Report, View Document of Records uploaded for any Employee and View Employment Info of a Direct Report

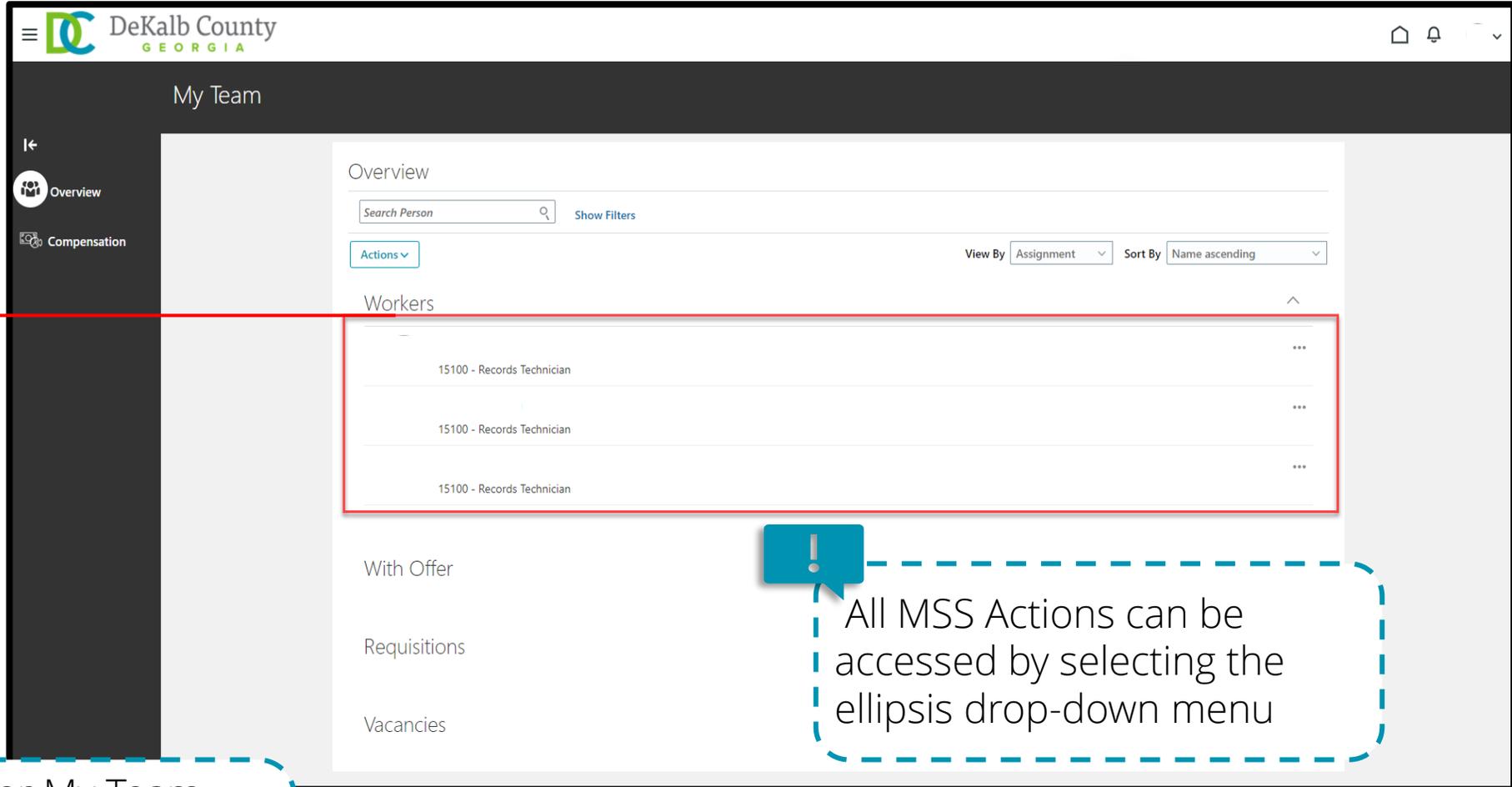
2

Select the **My Team** tile from the Apps section

View Direct Reports

3

View all Direct Reports



Workers	
15100 - Records Technician	...
15100 - Records Technician	...
15100 - Records Technician	...

Once you enter My Team app, all your Direct reports will be listed under Worker Section

All MSS Actions can be accessed by selecting the ellipsis drop-down menu

View Direct Reports: Knowledge Check

Managers can view their own Direct Reports through the My Team tile

True or False?

A. True

B. False



View Direct Reports Knowledge Check

Managers can view their own Direct Reports through the My Team tile

True or False?

A. *True*

B. *False*



The correct answer is A. Managers can view their own Direct Reports through the My Team tile

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- View all Direct Reports

Managing Direct and Indirect Reports

Lesson 2: View Direct and Indirect Report Hierarchy (Core HR)

Lesson Objective:

Upon the completion of the View Direct and Indirect Report Hierarchy Lesson, you will be able to:

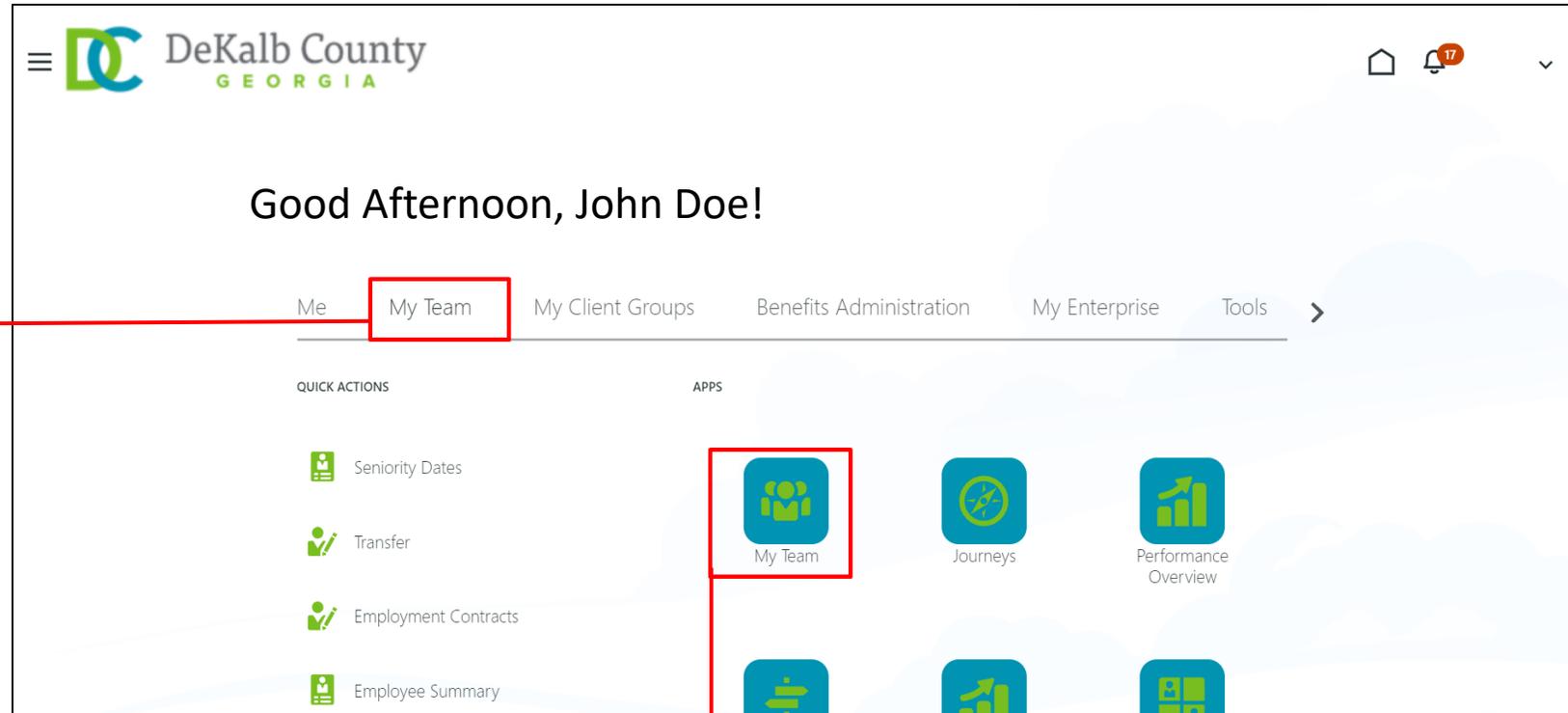
Objective

- View the Hierarchy for Direct and Indirect Reports

View Direct and Indirect Report Hierarchy

1

Select the **My Team** tab from the CV360 homepage



2

Select the **My Team** tile in the Apps section

View Direct and Indirect Report Hierarchy

My Team

Assignment

Overview

[Show Filters](#)

[Actions](#) View By Sort By

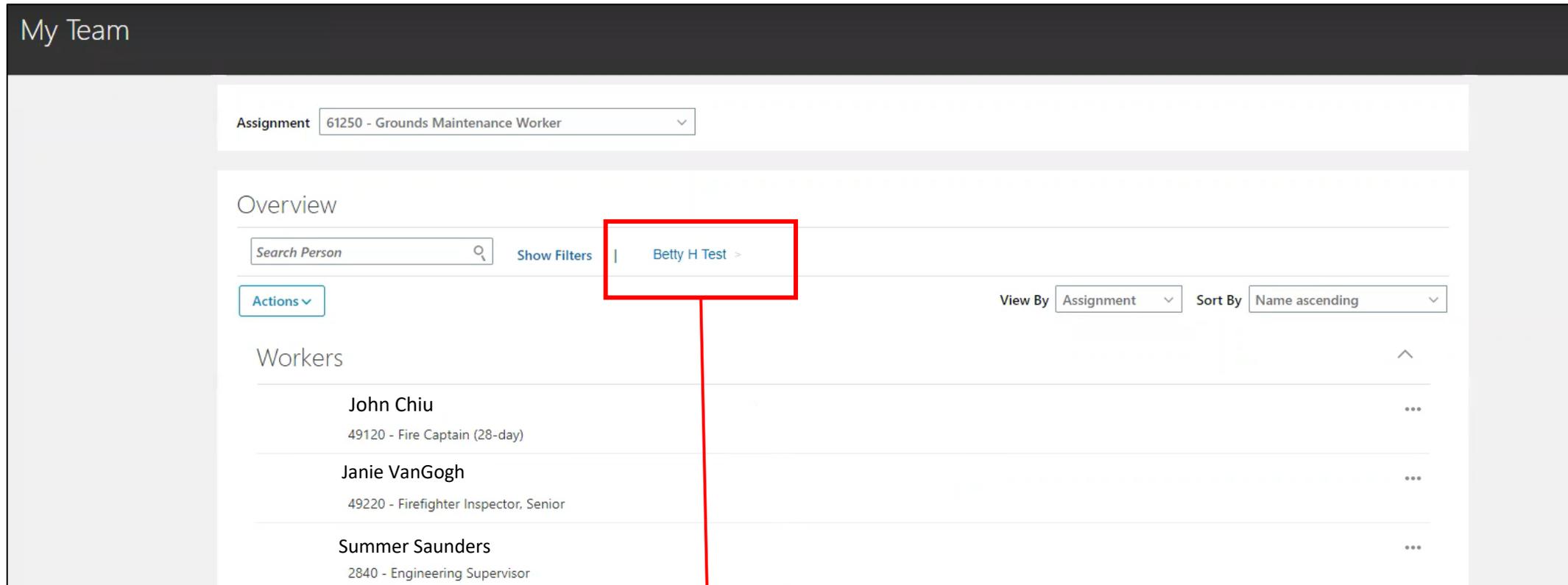
Workers

	Carl A Test 99005 - Office Assistant	 3 Directs, 3 Total	
	Jamison Test 99005 - Office Assistant		

3

Select the **Total** link to view Total Reports under an individual

View Direct and Indirect Report Hierarchy



My Team

Assignment: 61250 - Grounds Maintenance Worker

Overview

Search Person Show Filters | [Betty H Test >](#)

Actions

View By: Assignment Sort By: Name ascending

Workers

John Chiu	49120 - Fire Captain (28-day)	...
Janie VanGogh	49220 - Firefighter Inspector, Senior	...
Summer Saunders	2840 - Engineering Supervisor	...

View any Direct and Indirect Reports for the original Employee selected

4

Select the **Employee Name** link to return to that Reports page

View Direct and Indirect Report Hierarchy: Knowledge Check

Managers can view an Employee's Direct and Indirect Reports by clicking on the "Total" link next to their name
True or False?

A. True

B. False



View Direct and Indirect Report Hierarchy: Knowledge Check

Managers can view an Employee's Direct and Indirect Reports by clicking on the Total link next to their name

True or False?

A. **True**

B. False



The correct answer is A. Managers can view an Employee's Direct and Indirect Reports by clicking on the **Total** link next to their name

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- View a Direct Report's other Reports

Managing Direct and Indirect Reports

Lesson 3: Change Location (Core HR)

Lesson Objective:

Upon the completion of the Change Location Lesson, you will be able to:

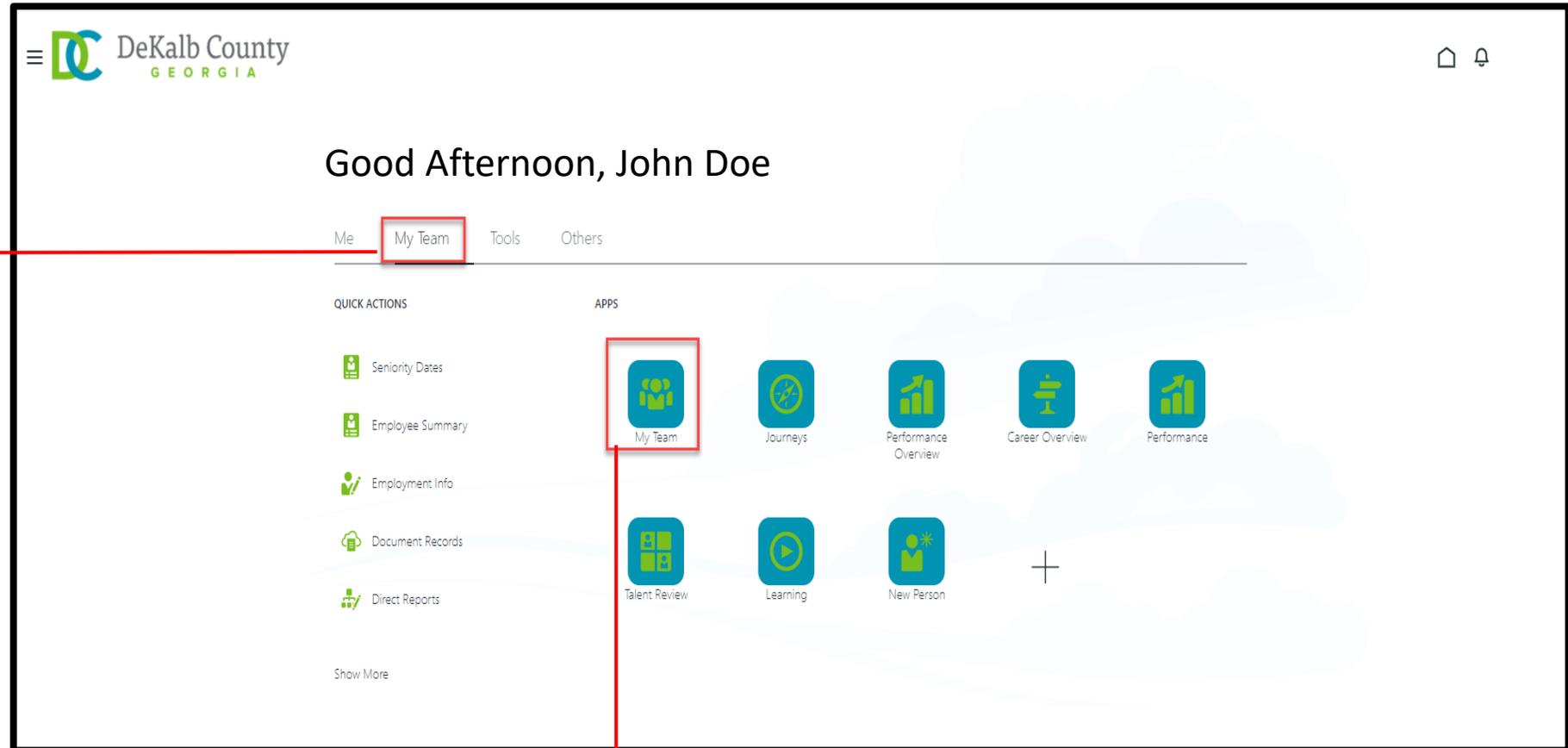
Objective

- Change Location of an Employee

Change Location

1

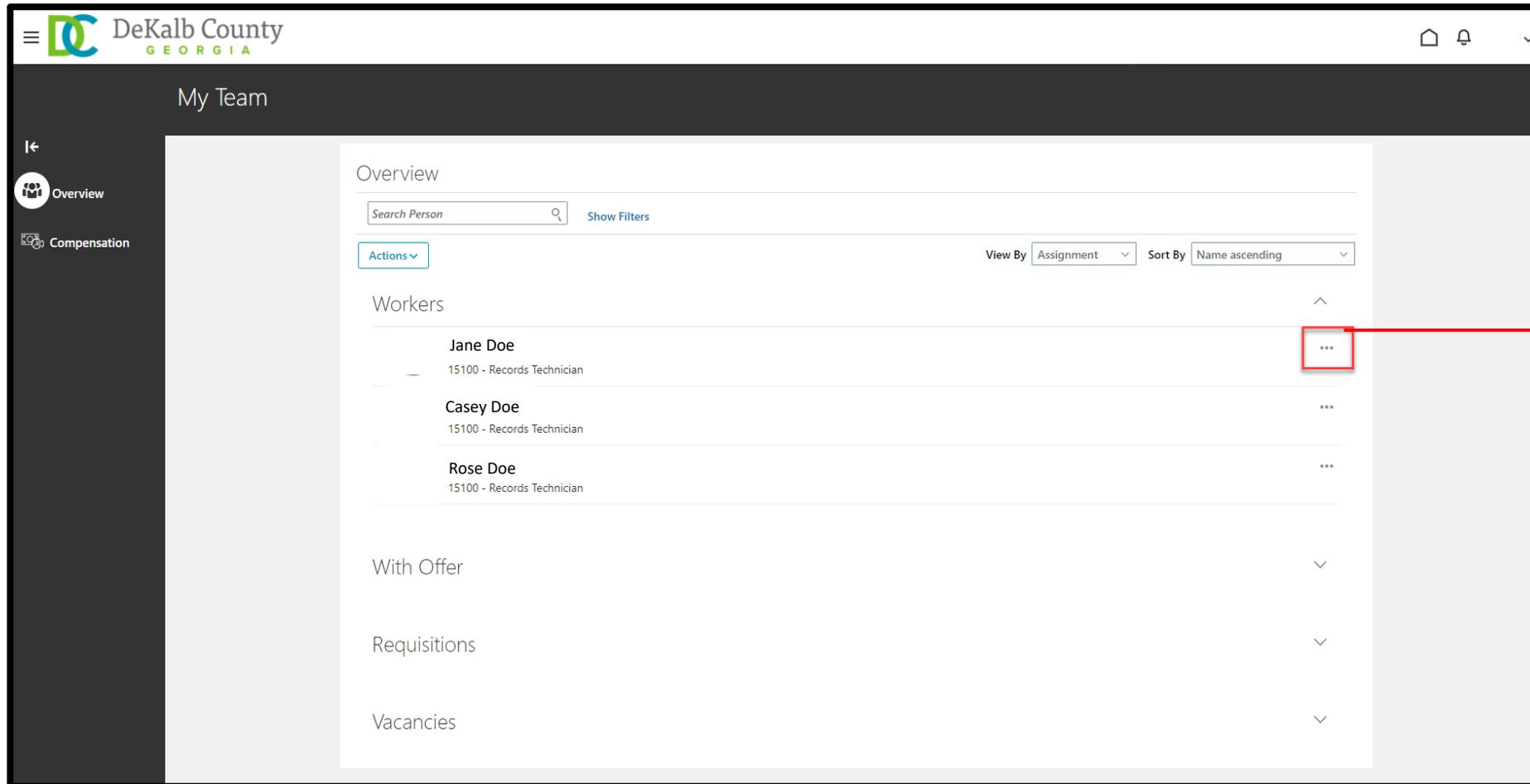
Select the My Team tab from the CV360 Home page



2

Select the My Team tile in the Apps section

Change Location



DeKalb County
GEORGIA

My Team

Overview

Search Person Show Filters

Actions View By Sort By

Workers

Jane Doe 15100 - Records Technician	...
Casey Doe 15100 - Records Technician	...
Rose Doe 15100 - Records Technician	...

With Offer

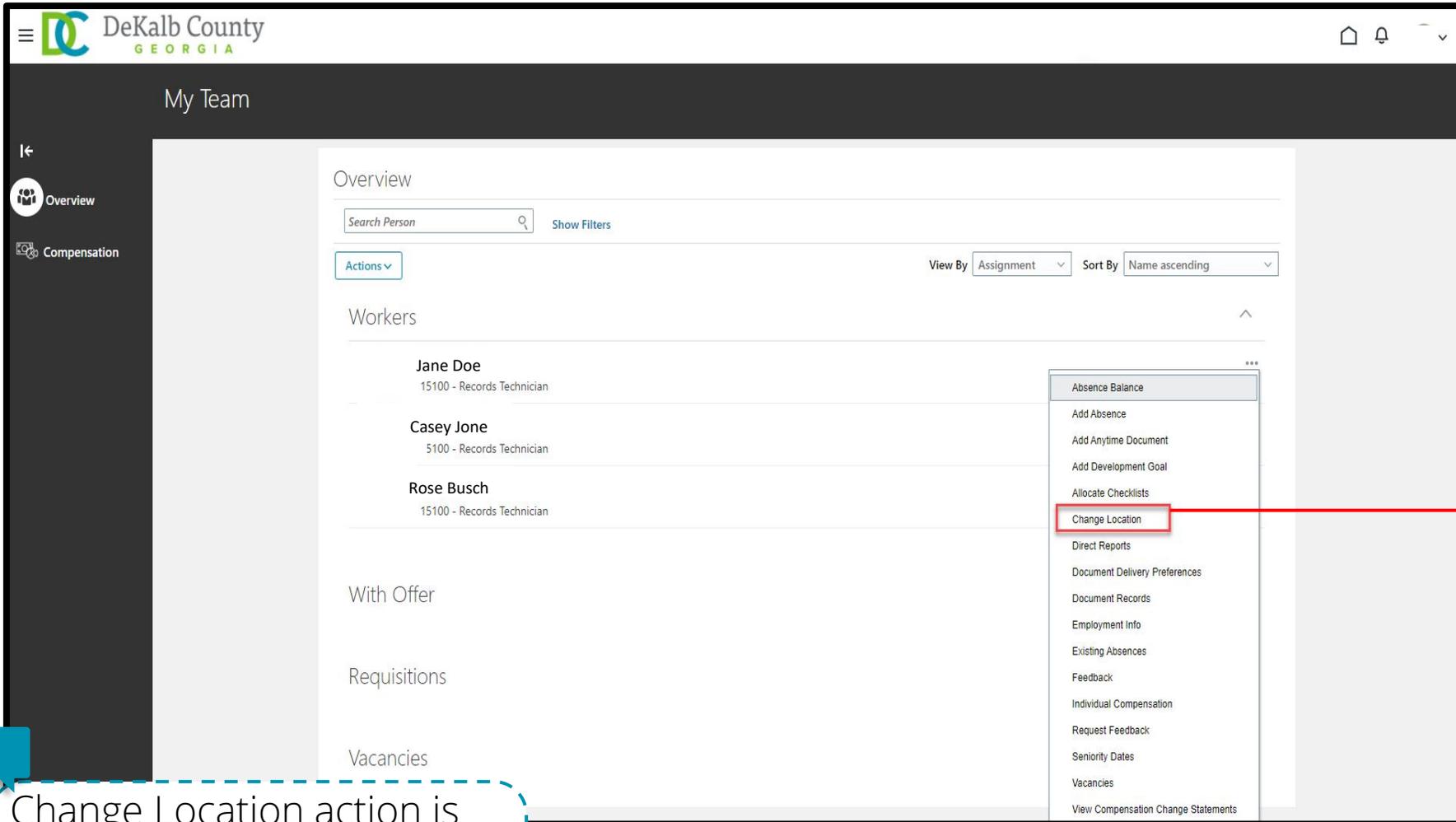
Requisitions

Vacancies

3

Select the Ellipses drop-down menu to access the Change Location Action

Change Location



DeKalb County
GEORGIA

My Team

Overview

Search Person Show Filters

Actions View By Sort By

Workers

- Jane Doe
15100 - Records Technician
- Casey Jone
5100 - Records Technician
- Rose Busch
15100 - Records Technician

With Offer

Requisitions

Vacancies

- Absence Balance
- Add Absence
- Add Anytime Document
- Add Development Goal
- Allocate Checklists
- Change Location
- Direct Reports
- Document Delivery Preferences
- Document Records
- Employment Info
- Existing Absences
- Feedback
- Individual Compensation
- Request Feedback
- Seniority Dates
- Vacancies
- View Compensation Change Statements

4

Select **Change Location** from the drop-down list

! Change Location action is auto-approved and there will be no notifications sent when selected

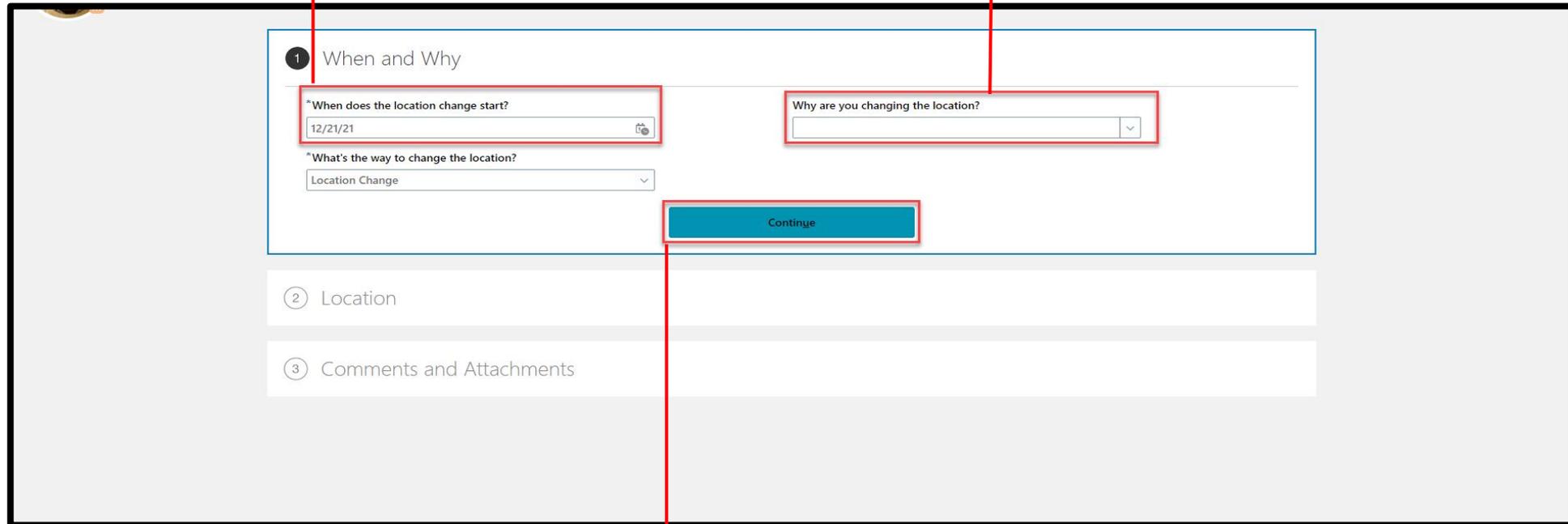
Change Location

5

Select the appropriate **Date**

6

Select the appropriate **Reason**, if applicable



The screenshot shows a web form titled "1 When and Why". It contains three input fields: a date picker for "When does the location change start?" with the value "12/21/21", a dropdown menu for "Why are you changing the location?", and another dropdown menu for "What's the way to change the location?" with the value "Location Change". A blue "Continue" button is positioned below these fields. Below the form are two additional sections: "2 Location" and "3 Comments and Attachments".

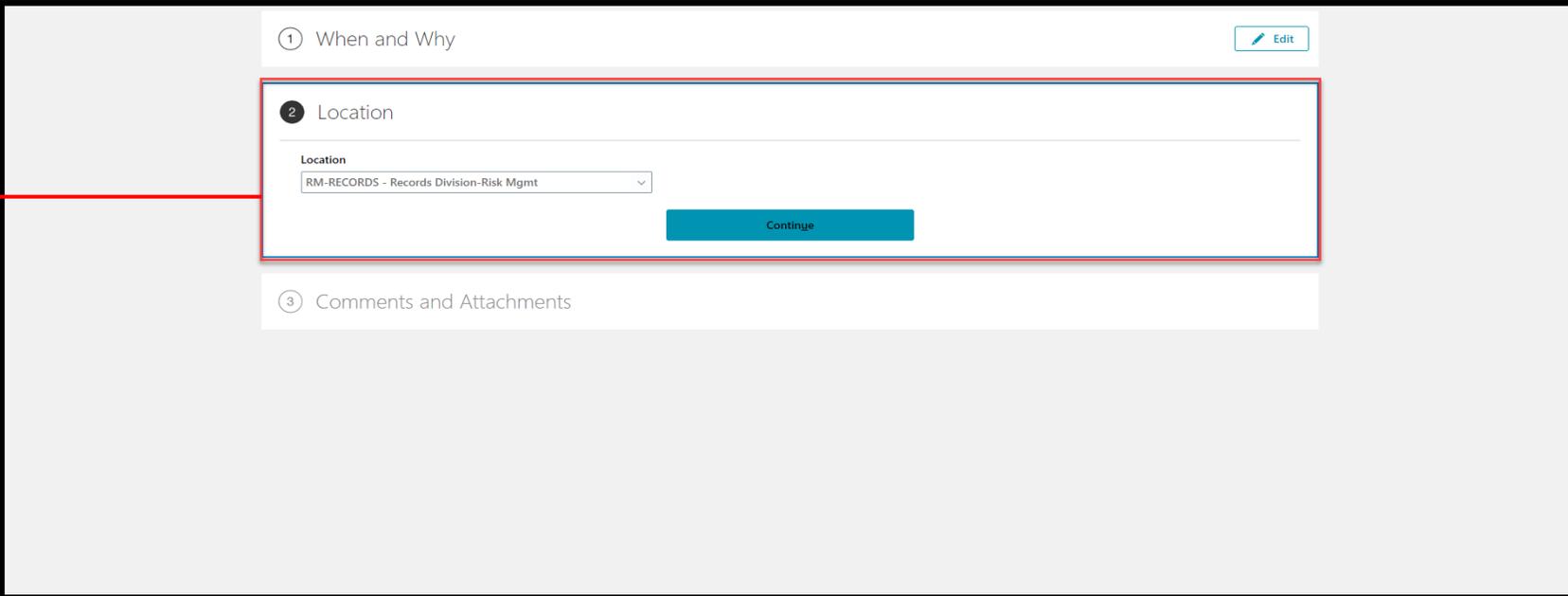
7

Select the **Continue** button

Change Location

8

Selecting the **Continue** button will open the Location Section with the Current Location already populated. You can remove the Current Location from the Location field and start keying in the new Location and selecting the correct Location from the suggestions



① When and Why [Edit](#)

② Location

Location

RM-RECORDS - Records Division-Risk Mgmt

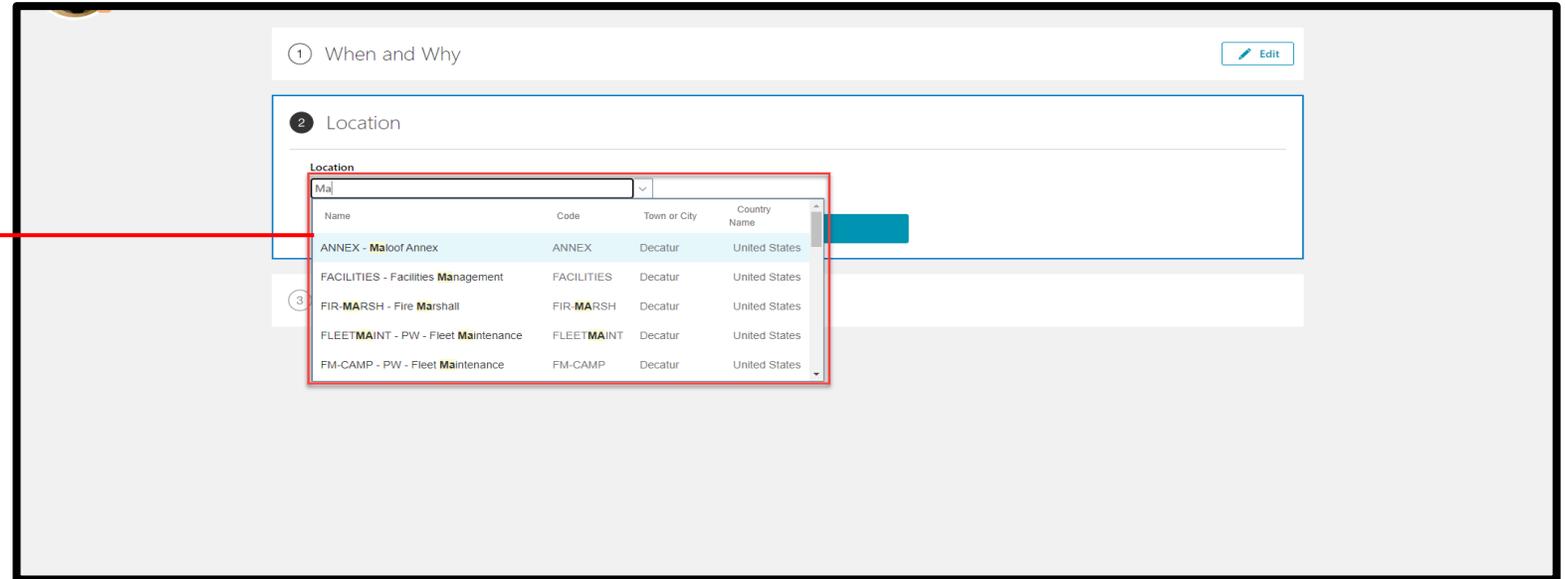
Continue

③ Comments and Attachments

Change Location

9

Select the appropriate **Location** from the drop-down list



1 When and Why Edit

2 Location

Location

Ma

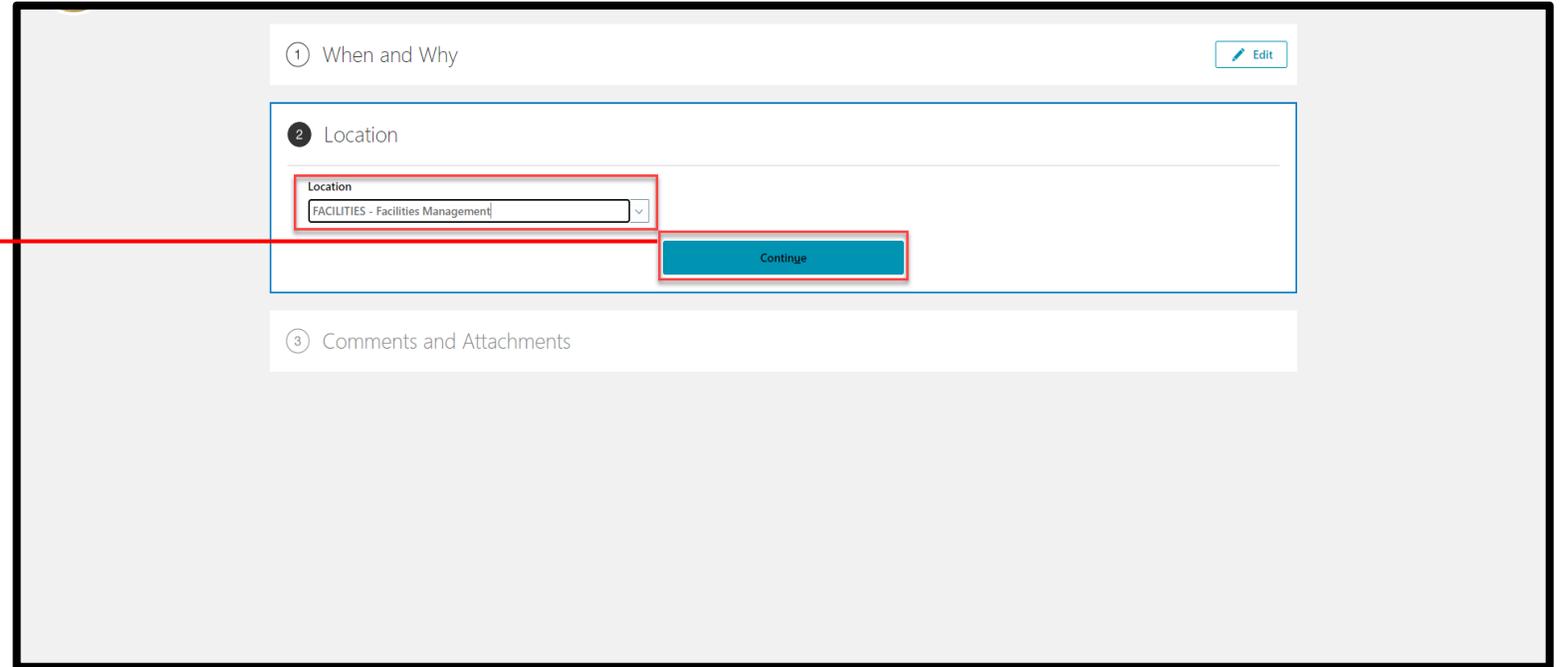
Name	Code	Town or City	Country Name
ANNEX - Ma loof Annex	ANNEX	Decatur	United States
FACILITIES - Facilities Ma agement	FACILITIES	Decatur	United States
FIR- Ma RSH - Fire Ma rshall	FIR- Ma RSH	Decatur	United States
FLEET Ma INT - PW - Fleet Ma intenance	FLEET Ma INT	Decatur	United States
FM-CAMP - PW - Fleet Ma intenance	FM-CAMP	Decatur	United States

3

Change Location

10

Select the **Continue** button once the correct Location is selected



① When and Why Edit

② Location

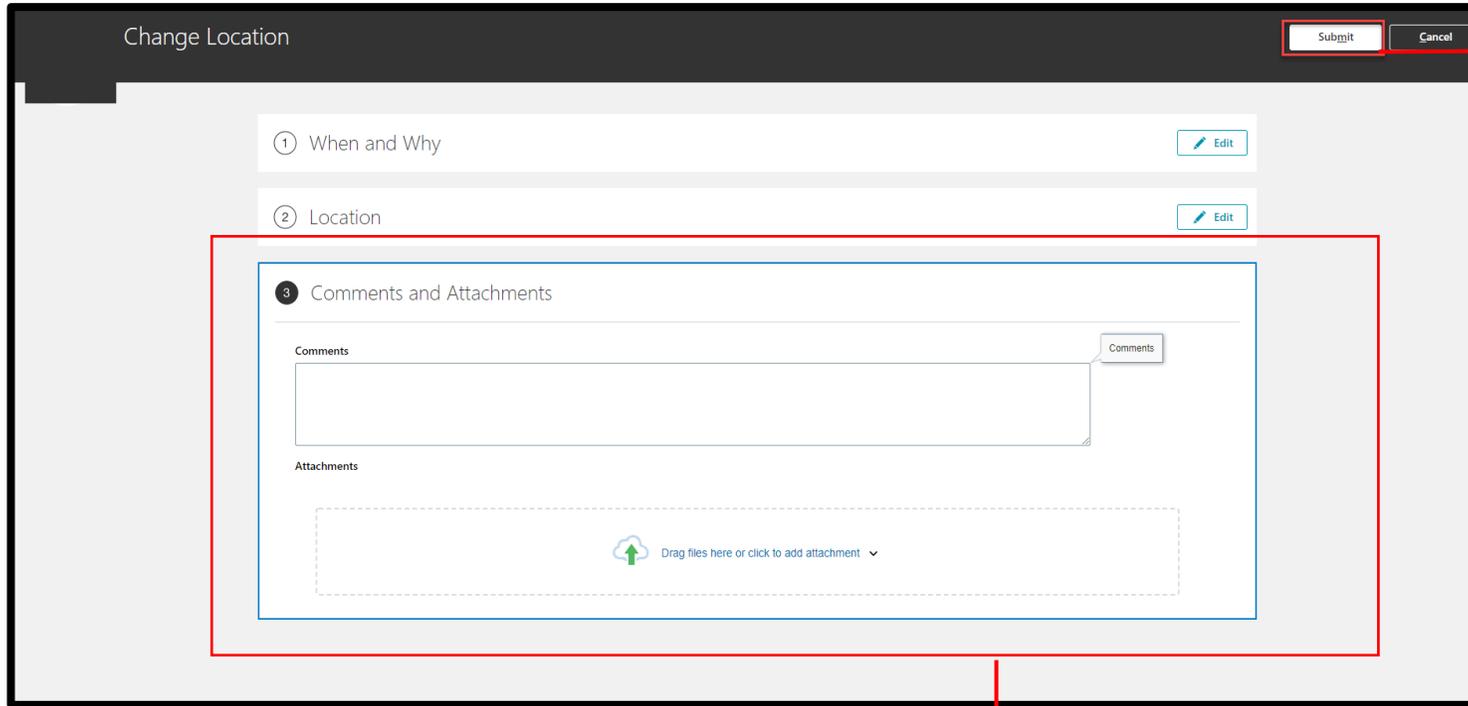
Location
FACILITIES - Facilities Management

Continue

③ Comments and Attachments

! Selecting the **Continue** button will open the Comments and Attachment Section, since there are no Approvals, select the **Continue** button to submit the transaction

Change Location



The screenshot shows a web form titled "Change Location". At the top right, there are "Submit" and "Cancel" buttons. The form is divided into three sections: "1 When and Why", "2 Location", and "3 Comments and Attachments". Each section has an "Edit" button. The "3 Comments and Attachments" section is highlighted with a red border. It contains a "Comments" text area and an "Attachments" section with a dashed box and the text "Drag files here or click to add attachment".

12

Select the **Submit** button to save the updated Location

11

Upload any appropriate documents using the drag and drop feature, or by selecting the **Drag files here or click to add attachment** hyperlink to upload a specific file from the local desktop

Change Location: Knowledge Check

Managers must select a Date when the Location Change will occur for an Employee
True or False?

A. True

B. False



Change Location: Knowledge Check

Managers must select a Date when the Location Change will occur for an Employee
True or False?

A. *True*

B. *False*



The correct answer is A. Managers must select a Date when the Location Change will occur for an Employee

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- Change a Location for a Direct Report

Managing Direct and Indirect Reports

Lesson 4: View Document Records (Core HR)

Lesson Objective:

Upon the completion of the View Document Records, you will be able to:

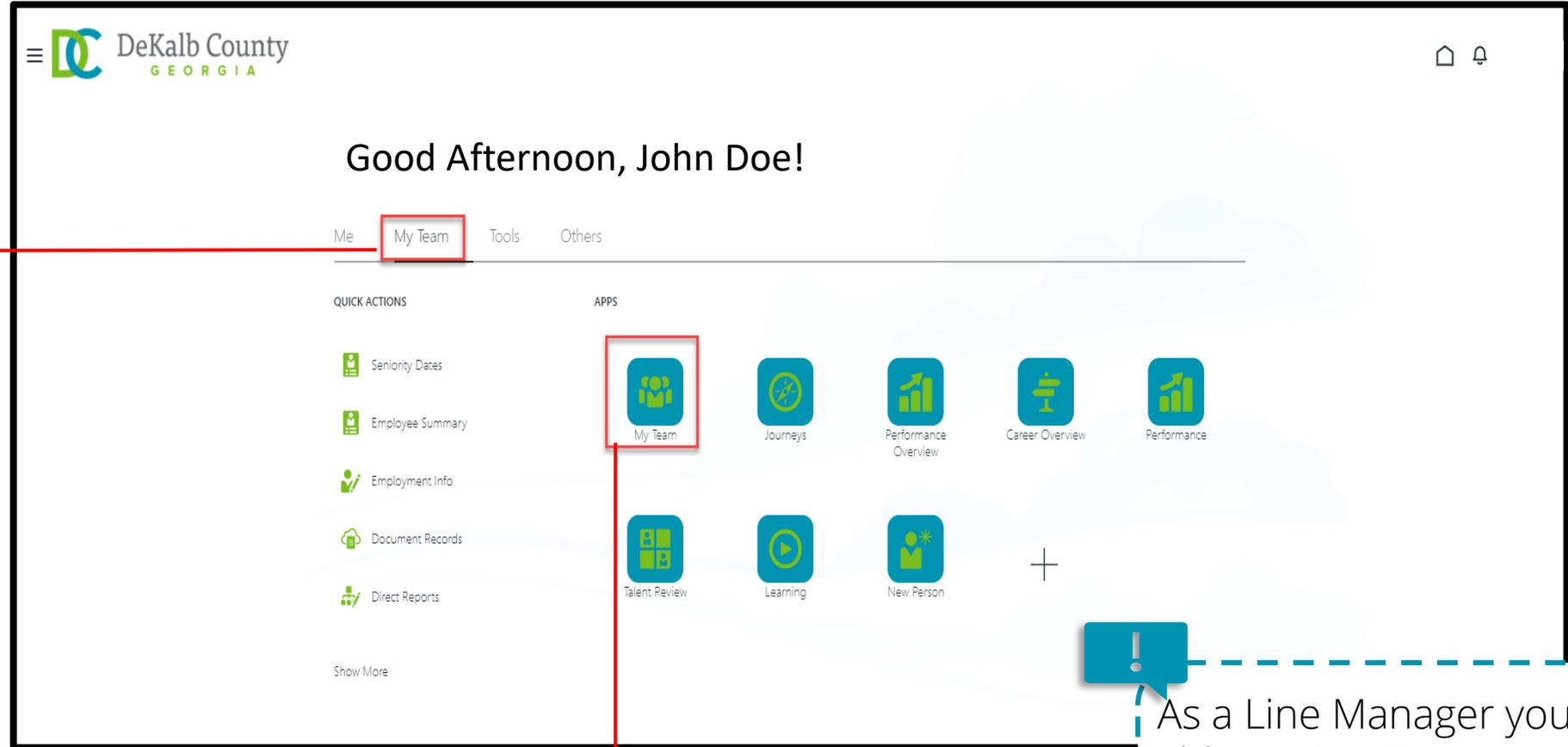
Objective

- View Document Records

View Document Records

1

Select the My Team tab from the CV360 Home page

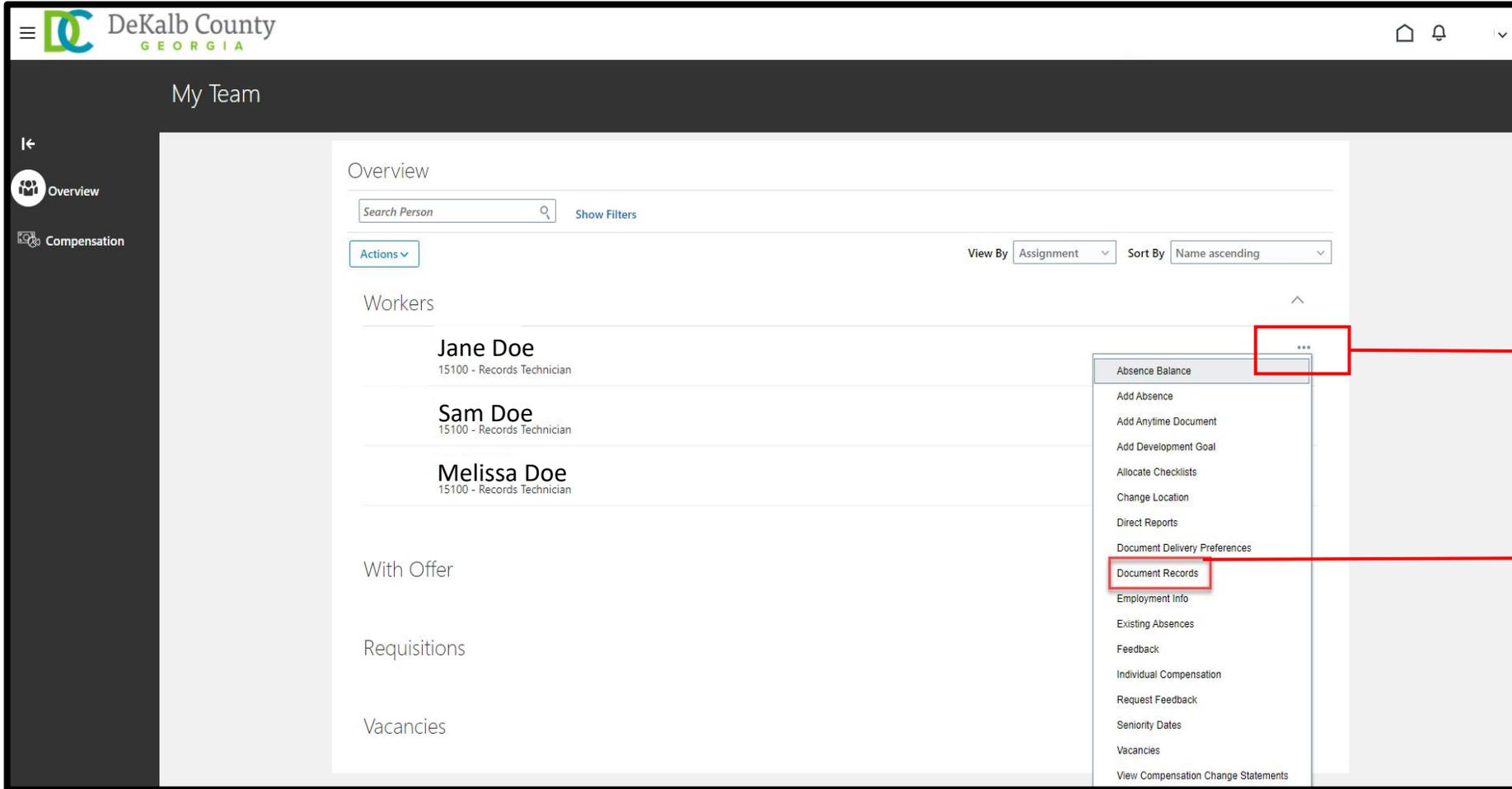


2

Select the My Team tile in the Apps section

As a Line Manager you'll be able to view Document of Records uploaded for any of your Direct Reports

View Document Records



The screenshot shows the 'My Team' overview page in the CloudVergent 360 system. The page header includes the DeKalb County Georgia logo and navigation icons. The main content area is titled 'Overview' and features a search bar for 'Search Person', a 'Show Filters' button, and controls for 'View By' (set to 'Assignment') and 'Sort By' (set to 'Name ascending'). Below these controls is a list of workers under the heading 'Workers'. The first worker listed is Jane Doe, with the job title '15100 - Records Technician'. A red box highlights the ellipsis button to the right of her name. A dropdown menu is open for Jane Doe, listing various actions. A red box highlights the 'Document Records' option in this menu. Other workers listed are Sam Doe and Melissa Doe, both with the job title '15100 - Records Technician'. Below the workers list are sections for 'With Offer', 'Requisitions', and 'Vacancies'. A sidebar on the left contains navigation options for 'Overview' and 'Compensation'.

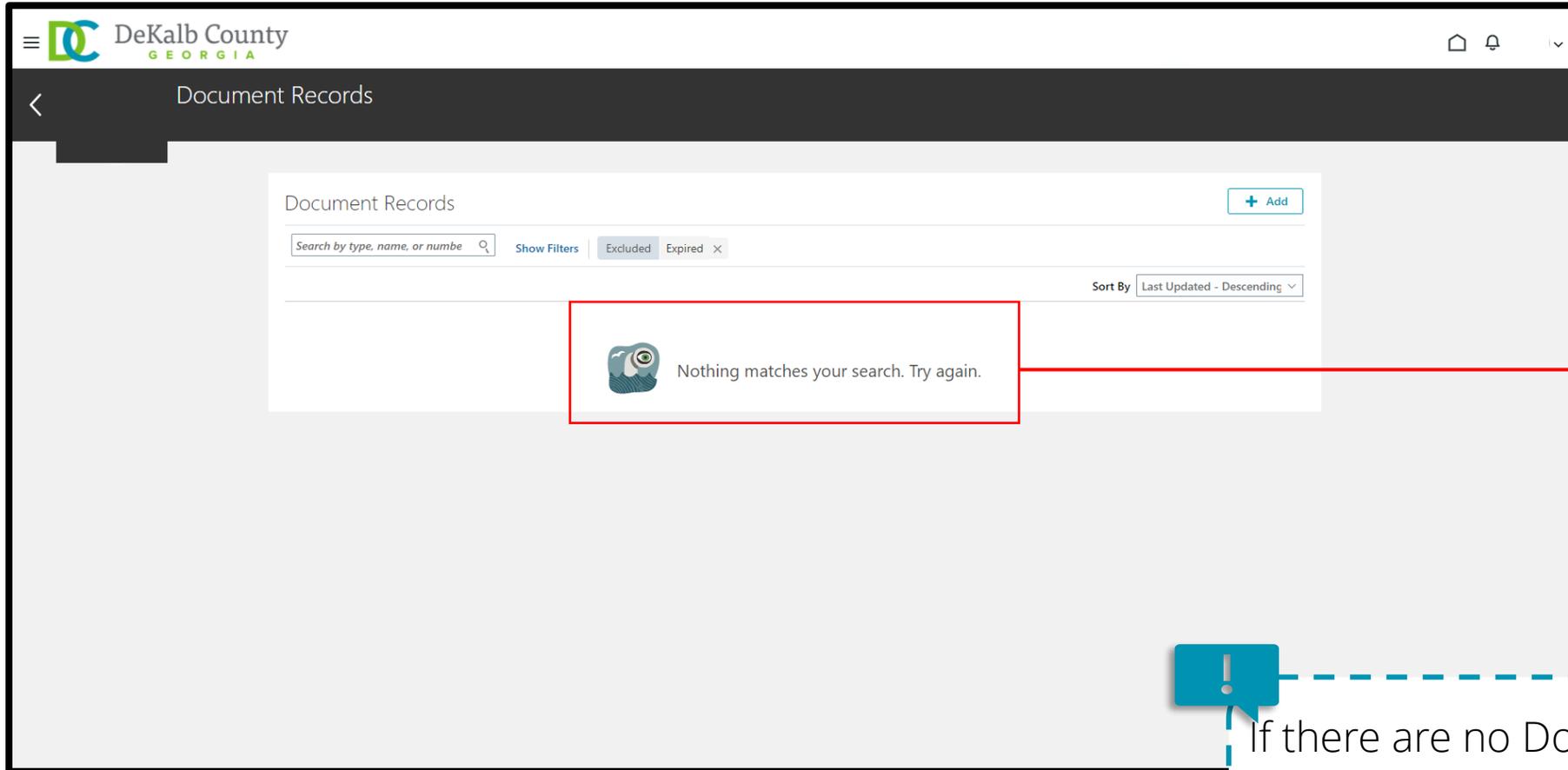


Select Ellipses button



Select **Document Records** from the options Ellipses drop-down list

View Document Records



Document Records

Search by type, name, or number

Show Filters

Excluded Expired

Sort By Last Updated - Descending

Nothing matches your search. Try again.

4

Any Document Records will display here, if available

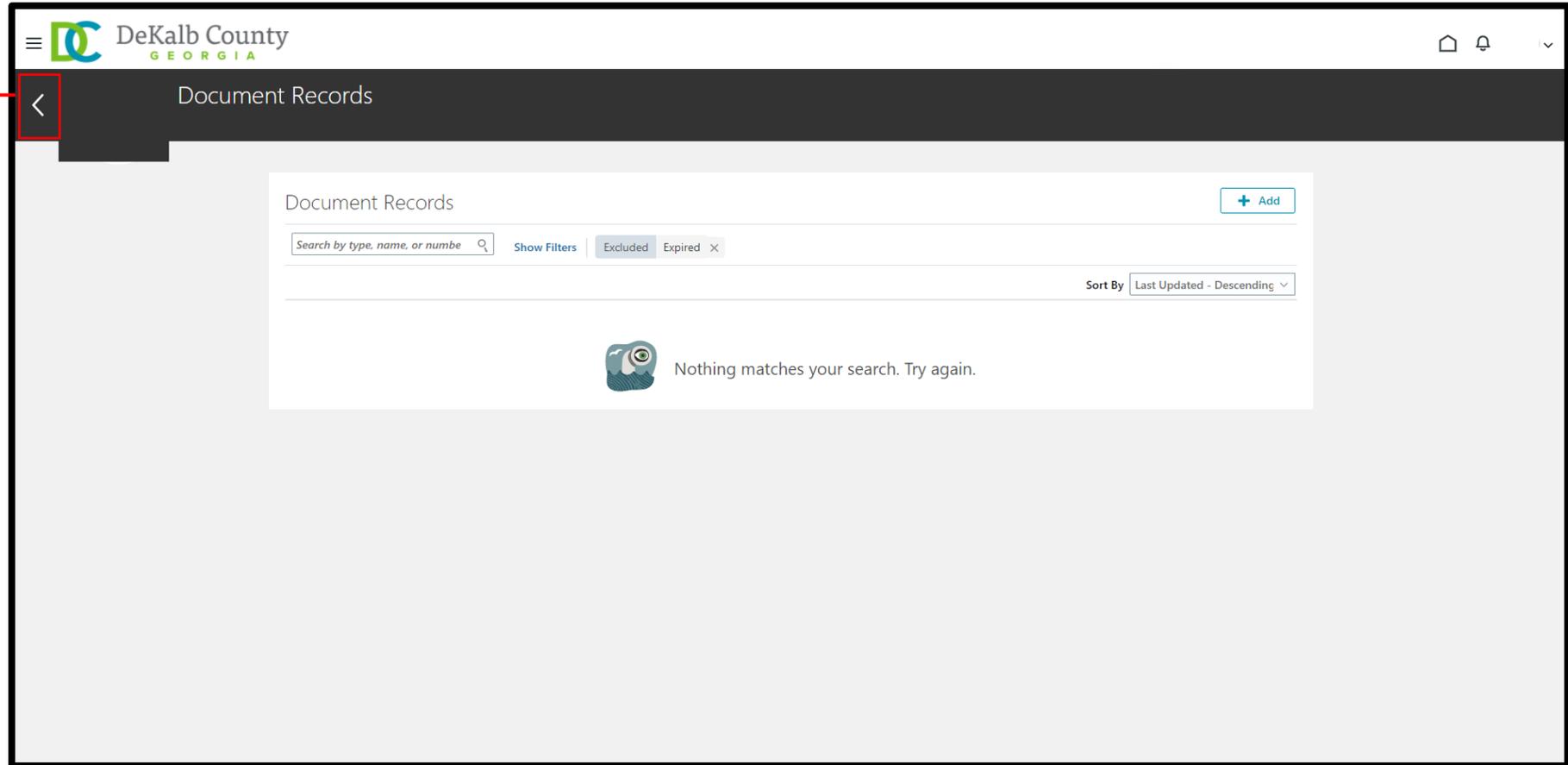


If there are no Documents available for you to see as a Manager, a message will display saying "Nothing matches your search. Try again."

View Document Records

5

Select the back arrow to go back to the My Teams View



View Document Records: Knowledge Check

Managers can view Document Records for a specific Employee by selecting the ellipses then selecting Document Records

True or False?

A. True

B. False



View Document Records: Knowledge Check

Managers can view Document Records for a specific Employee by selecting the ellipses then selecting Document Records

True or False?

A. *True*

B. *False*



The correct answer is A. Managers can view Document Records for a specific Employee by selecting the ellipses then selecting Document Records

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- View Document Records for a specific Employee

Managing Direct and Indirect Reports

Lesson 5: View Employment Information (Core HR)

Lesson Objective:

Upon the completion of the View Employment Information, you will be able to:

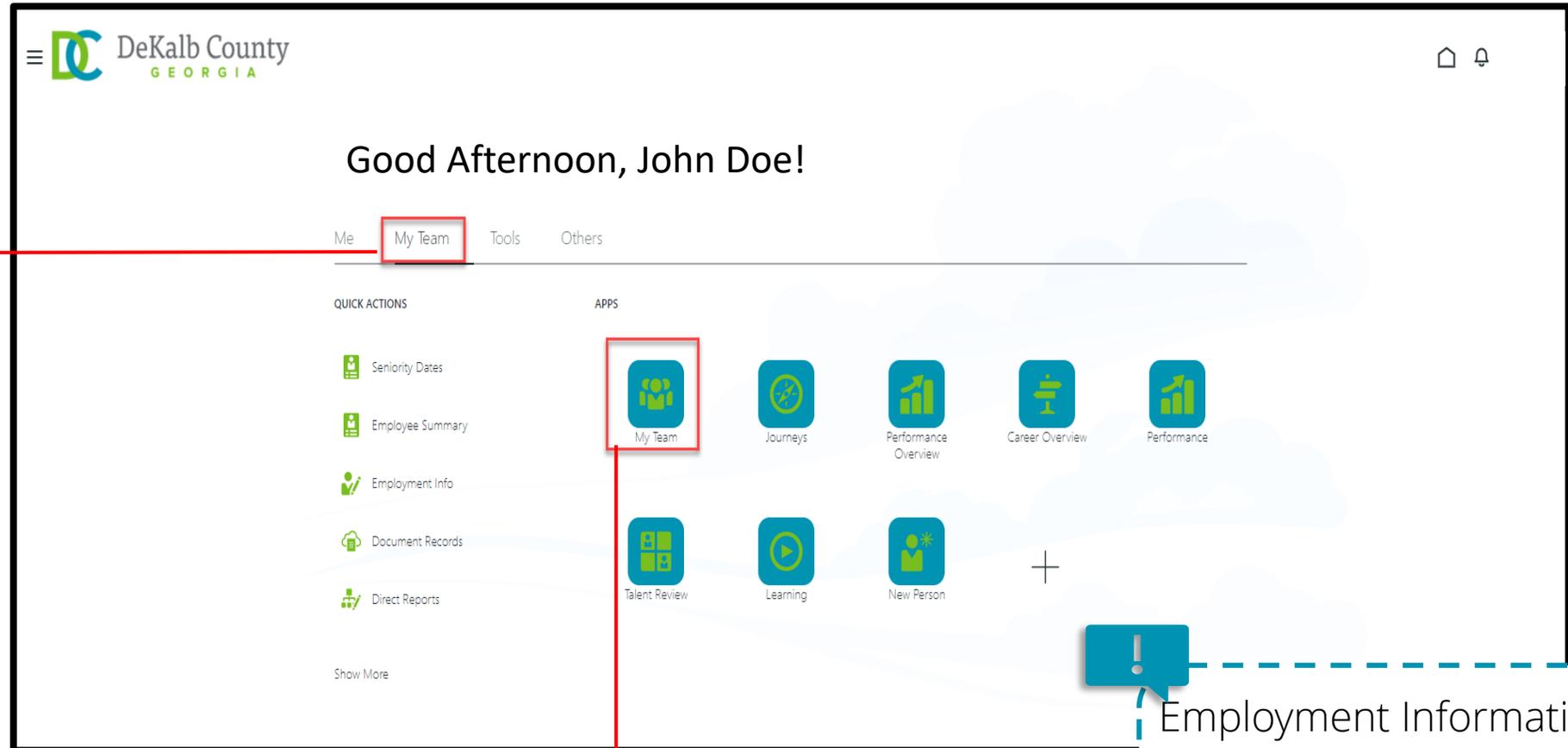
Objective

- View Employment Information for Employees

View Employment Information

1

Select the My Team tab from the top section of the Homepage



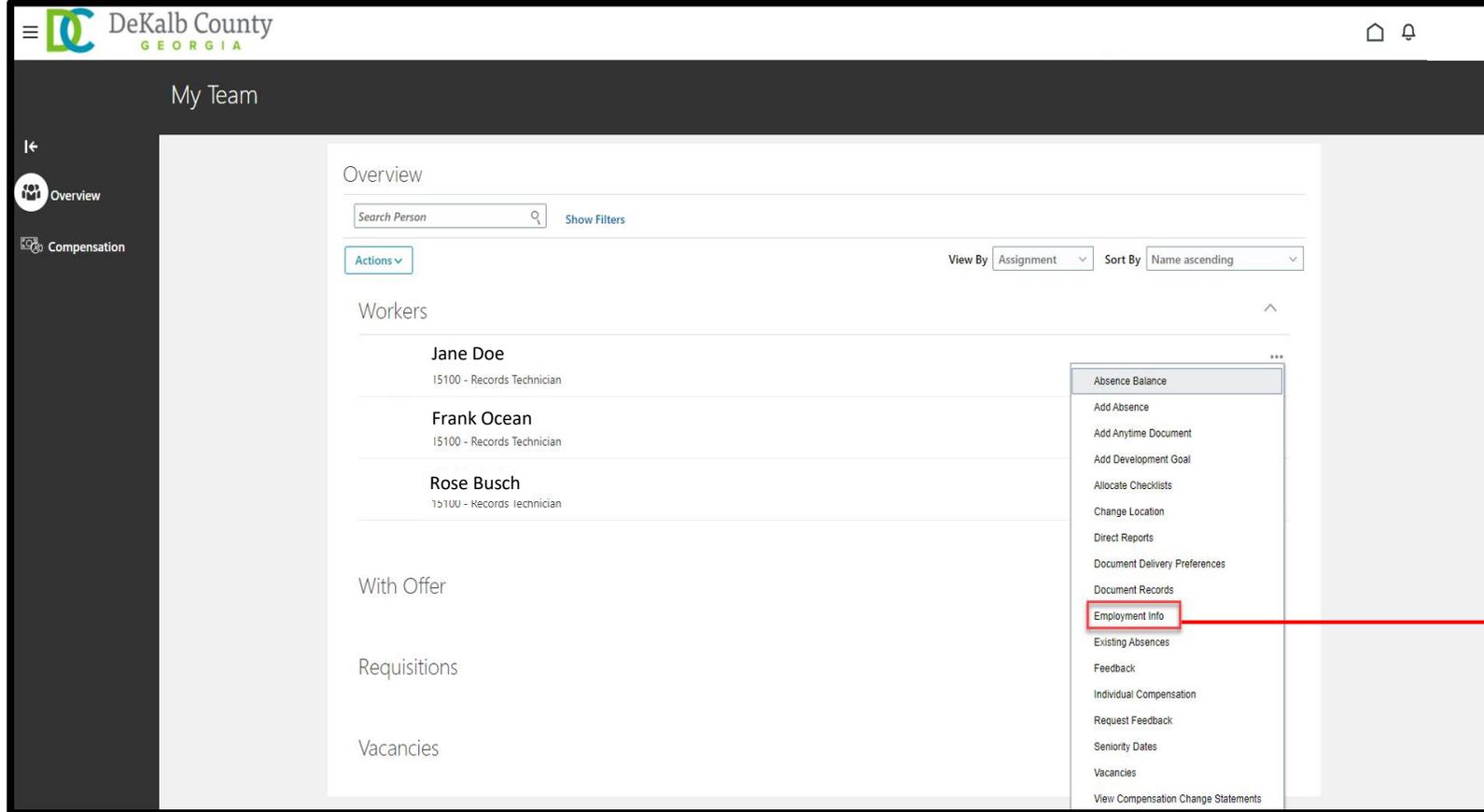
2

Select the My Team tile



Employment Information provides the basic Assignment Details of a Direct Report to his/her Manager

View Employment Information



DeKalb County
GEORGIA

My Team

Overview

Compensation

Overview

Search Person Show Filters

Actions View By Sort By

Workers

Jane Doe
15100 - Records Technician

Frank Ocean
15100 - Records Technician

Rose Busch
15100 - Records Technician

With Offer

Requisitions

Vacancies

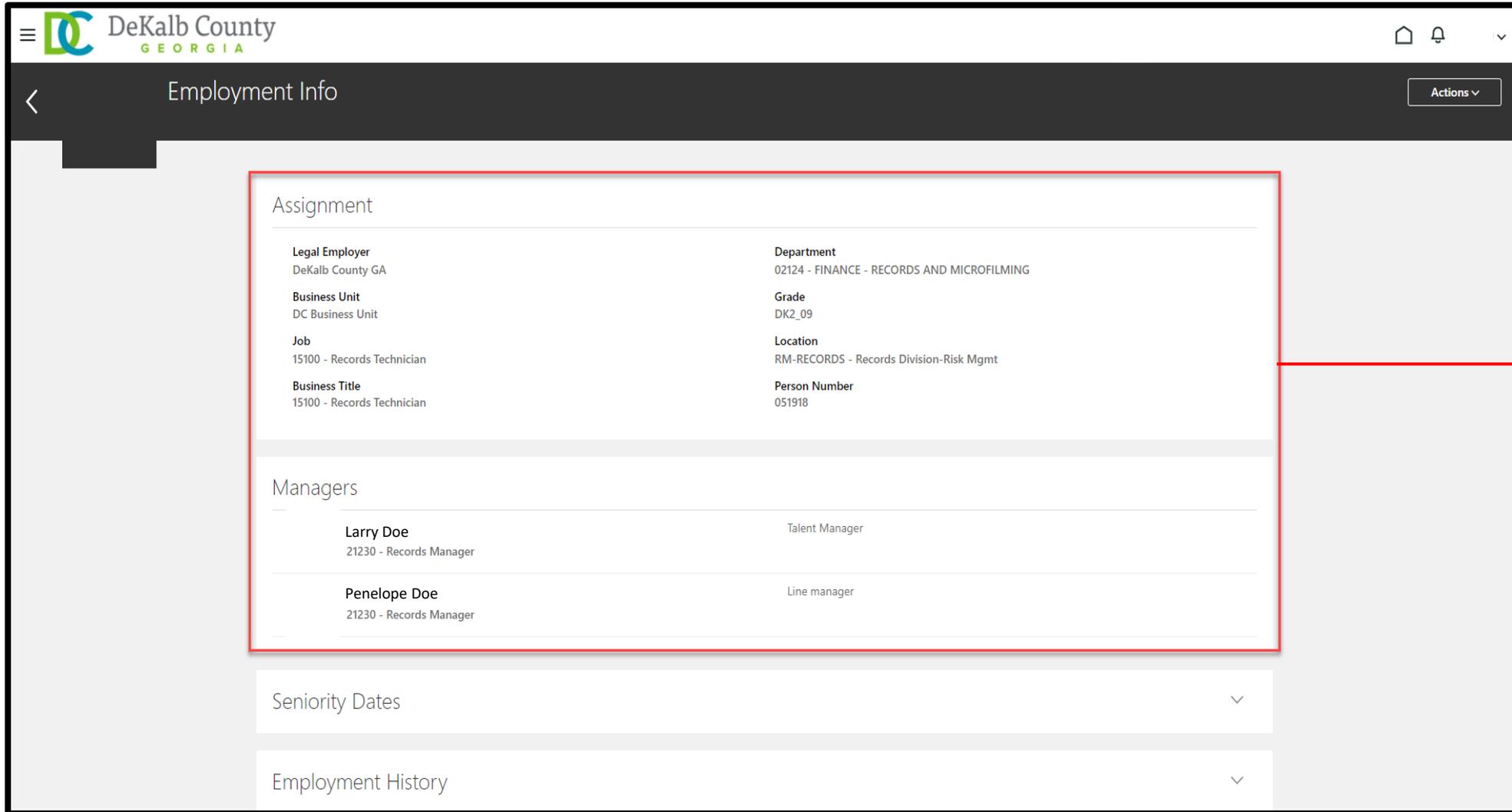
Absence Balance

- Add Absence
- Add Anytime Document
- Add Development Goal
- Allocate Checklists
- Change Location
- Direct Reports
- Document Delivery Preferences
- Document Records
- Employment Info**
- Existing Absences
- Feedback
- Individual Compensation
- Request Feedback
- Seniority Dates
- Vacancies
- View Compensation Change Statements

3

Select **Employment Info** from the Ellipses drop-down list

View Employment Information



DeKalb County
GEORGIA

Employment Info

Actions ▾

Assignment

Legal Employer DeKalb County GA	Department 02124 - FINANCE - RECORDS AND MICROFILMING
Business Unit DC Business Unit	Grade DK2_09
Job 15100 - Records Technician	Location RM-RECORDS - Records Division-Risk Mgmt
Business Title 15100 - Records Technician	Person Number 051918

Managers

Larry Doe 21230 - Records Manager	Talent Manager
Penelope Doe 21230 - Records Manager	Line manager

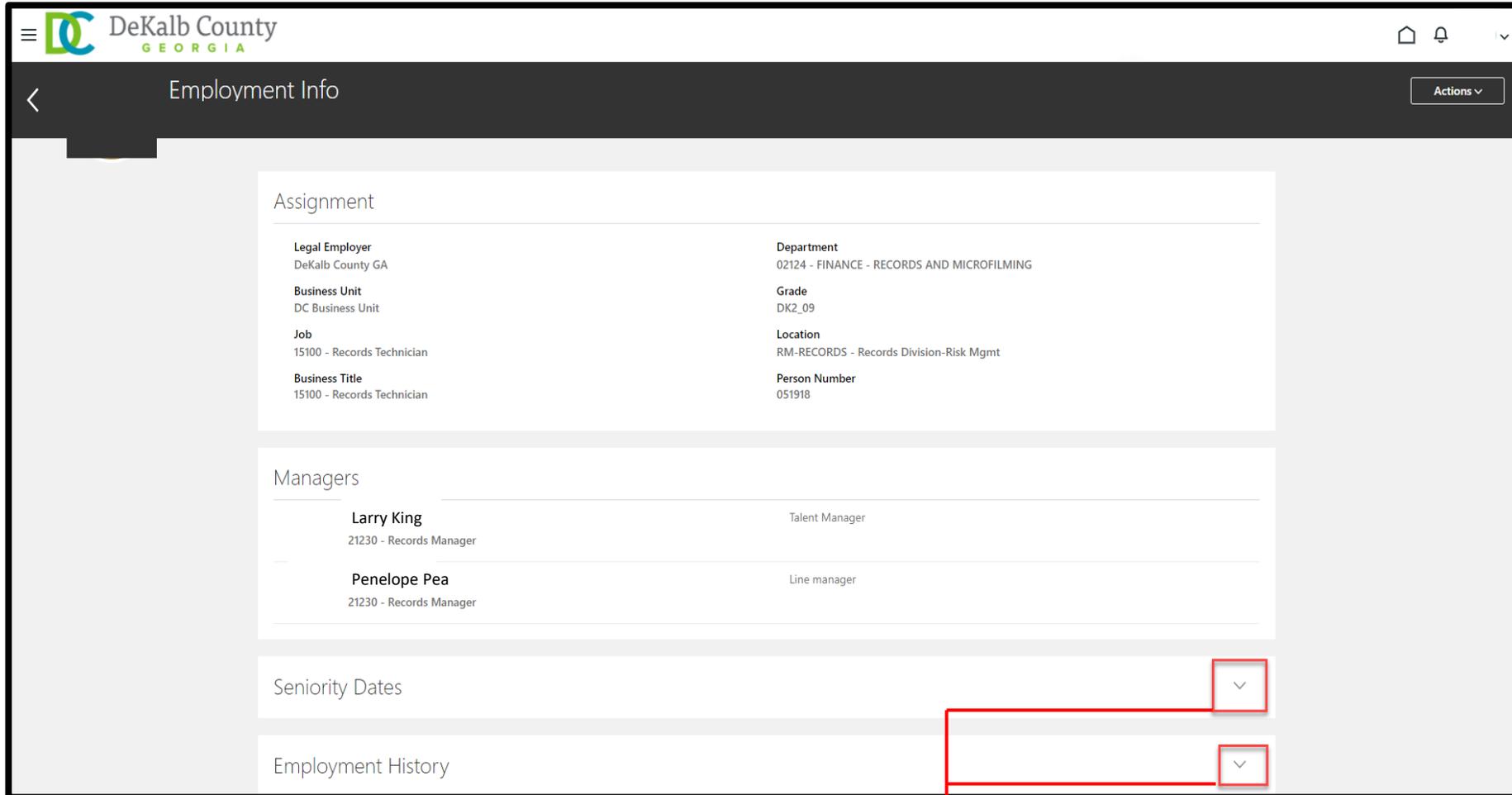
Seniority Dates ▾

Employment History ▾

4

Selecting Employment Info will show the Assignment Information, Seniority Dates, and Employment History

View Employment Information



DeKalb County
GEORGIA

Employment Info Actions ▾

Assignment

Legal Employer DeKalb County GA	Department 02124 - FINANCE - RECORDS AND MICROFILMING
Business Unit DC Business Unit	Grade DK2_09
Job 15100 - Records Technician	Location RM-RECORDS - Records Division-Risk Mgmt
Business Title 15100 - Records Technician	Person Number 051918

Managers

Larry King 21230 - Records Manager	Talent Manager
Penelope Pea 21230 - Records Manager	Line manager

Seniority Dates ▾

Employment History ▾

5

Select the arrow to expand the individual sections

View Employment Information

21230 - Records Manager

Employment Info Actions ▾

Seniority Dates ^

DeKalb County GA Legal Employer	Seniority Date 10/13/14	Length of Service 7 Years 0 Months 22 Days
DeKalb County Enterprise Enterprise	Seniority Date 10/13/14	Length of Service 7 Years 0 Months 22 Days
DeKalb County GA Legal Employer	Seniority Date 10/13/14	Length of Service 7 Years 0 Months 22 Days
02124 - FINANCE - RECORDS AND MICROFILMING Department	Seniority Date 10/13/14	Length of Service 7 Years 0 Months 22 Days

Load More Items 1-4 of 6 items

Employment History ^

Synchronization From Position Start Date 10/29/21

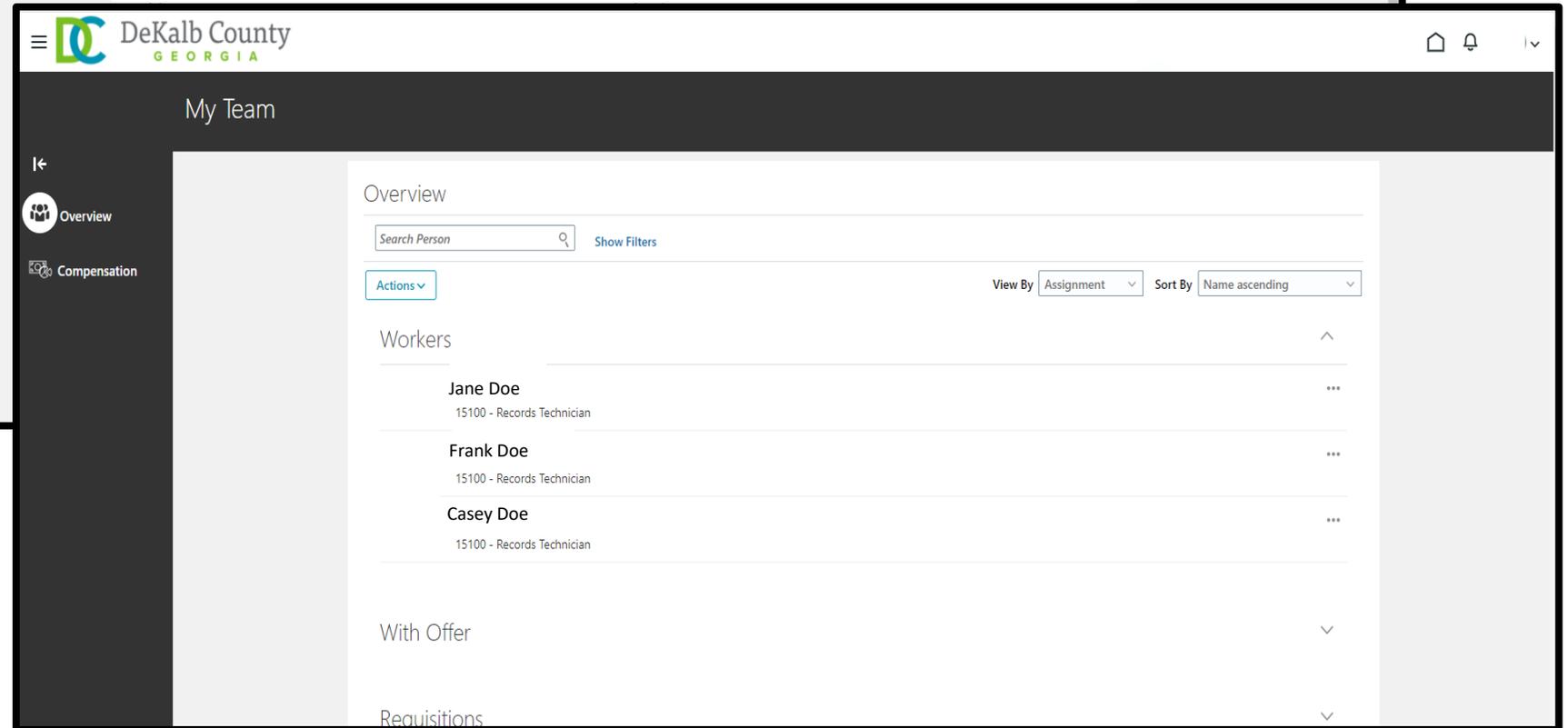
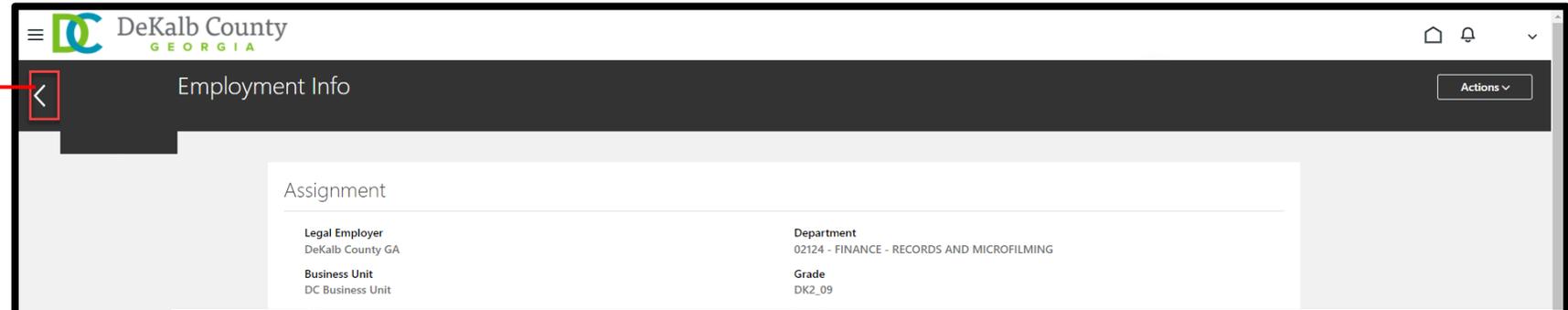


Selecting the Actions drop-down list will allow the Manager to initiate a Change Location request for a Direct Report. The other options in the Actions drop-down list are not available right now based on DeKalb Business requirements

View Employment Information

6

Select the back arrow to go back to the My Teams View



View Employment Information: Knowledge Check

Managers can view Employment Information including Seniority Dates for a specific Direct Report
True or False?

A. True

B. False



View Employment Information: Knowledge Check

Managers can view Employment Information including Seniority Dates for a specific Direct Report
True or False?

A. **True**

B. False



The correct answer is A. Managers can view Employment Information including Seniority Dates for a specific Direct Report

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- View Seniority Date information for a specific Employee

Managing Direct and Indirect Reports

Lesson 6: View Direct Report Salary and Allowances Details (Core HR)

Lesson Objective:

Upon the completion of the Add Goals Lesson, you will be able to:

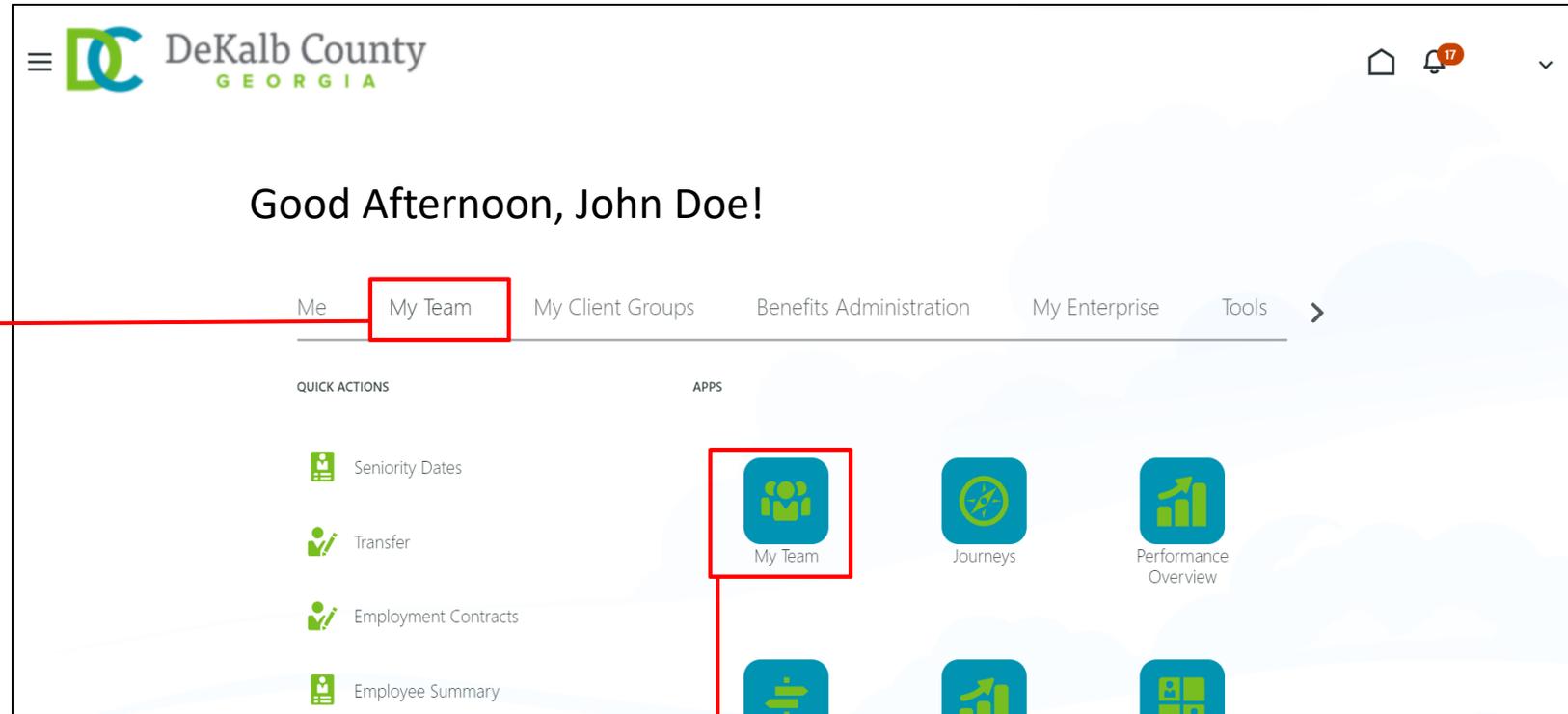
Objective

- View Salary and Allowances information for Direct Reports

View Direct Report Salary and Allowances Details

1

Select the **My Team** tab from the CV360 homepage



2

Select the **My Team** tile

View Direct Report Salary and Allowances Details

My Team

Overview

[Show Filters](#)

[Actions](#) View By Sort By

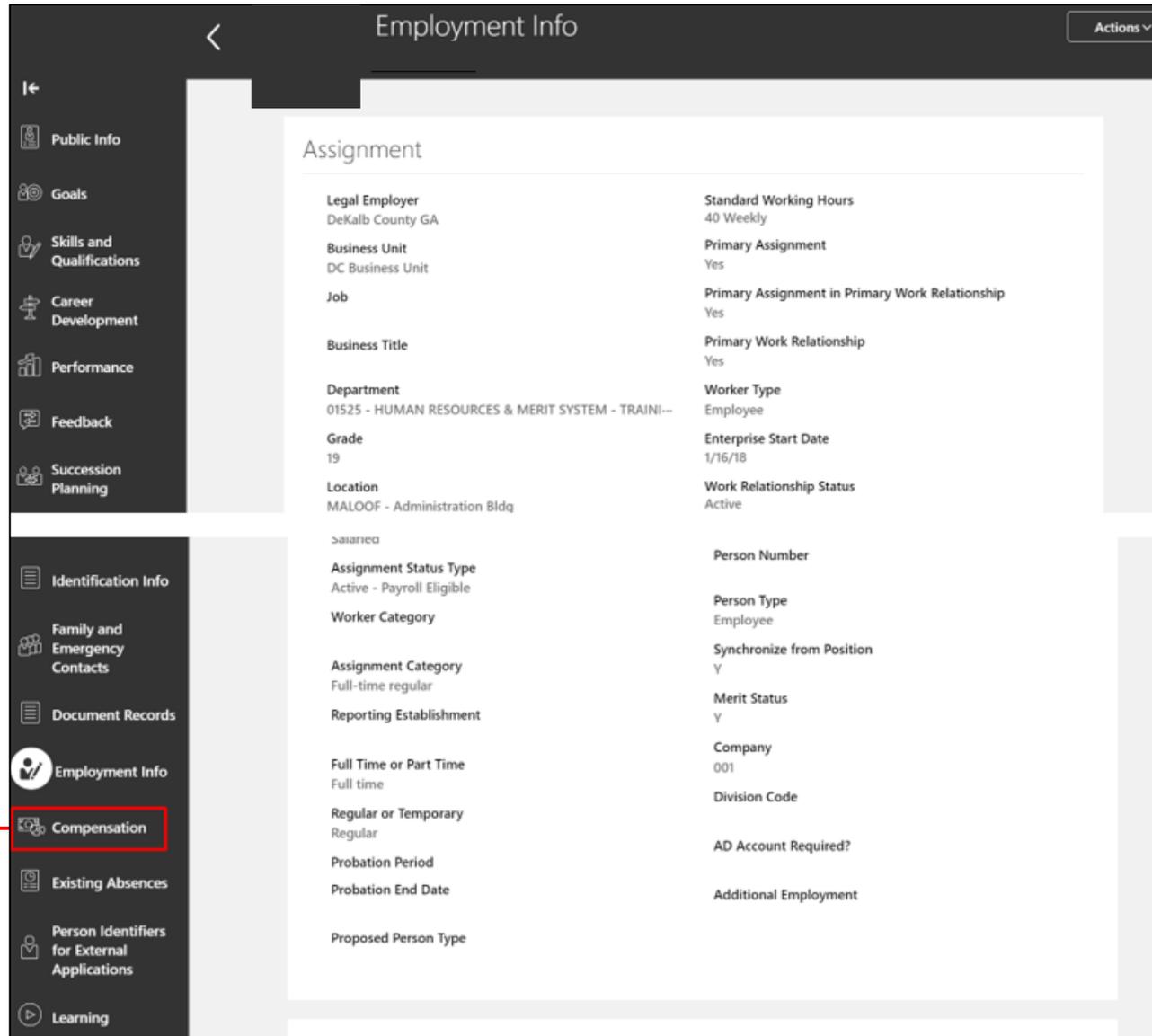
Workers

Jane Doe 15070 - Human Resources Specialist	...
Melissa Doe 15050 - Employee Development Trai...	...
Stacey Doe 15055 - Employee Development Sp...	...

3

Select the name of the Direct Report, (ex: Melissa Doe) whose details you wish to view

View Direct Report Salary and Allowances Details



The screenshot shows the 'Employment Info' page with the following details:

Assignment	
Legal Employer DeKalb County GA	Standard Working Hours 40 Weekly
Business Unit DC Business Unit	Primary Assignment Yes
Job	Primary Assignment in Primary Work Relationship Yes
Business Title	Primary Work Relationship Yes
Department 01525 - HUMAN RESOURCES & MERIT SYSTEM - TRAINI--	Worker Type Employee
Grade 19	Enterprise Start Date 1/16/18
Location MALOOF - Administration Bldg	Work Relationship Status Active
Assignment Status Type Active - Payroll Eligible	Person Number
Worker Category	Person Type Employee
Assignment Category Full-time regular	Synchronize from Position Y
Reporting Establishment	Merit Status Y
Full Time or Part Time Full time	Company 001
Regular or Temporary Regular	Division Code
Probation Period	AD Account Required?
Probation End Date	Additional Employment
Proposed Person Type	

4

Select the Compensation button

View Direct Report Salary and Allowances Details

5

Select the name of the **Allowance** to open a new page with further details about the Allowance offered to the Direct Report

DeKalb County GA

USD Annually

+1,605.9400 (+2.3481%)

Component Name	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Base salary					
Longevity <i>(Base salary)</i>	0.0000		0.0000	0.0000	0.0000
Hazardous Duty	0.0000		0.0000	0.0000	0.0000
Paramedic <i>(Base salary)</i>	0.0000		0.0000	0.0000	0.0000
Supplemental	0.0000		0.0000	0.0000	0.0000
Overall salary					

[Show Future and Prior Salary](#)

Additional Compensation

^

Car Allowance
 Car Allowance
 10/2/21 - Ongoing

Payment Details

Legal Employer DeKalb County GA	Award Frequency Recurring
Name Car Allowance Reimbursement	Amount 500.00 USD
Start Date 10/2/21	Periodicity Calendar Month
End Date Ongoing	

View Direct Report Salary and Allowances Details: Knowledge Check

Managers can view an Employee's Allowances through the Compensation button

True or False?

A. True

B. False



View Direct Report Salary and Allowances Details: Knowledge Check

Managers can view an Employee's Allowances through the Compensation button

True or False?

A. *True*

B. *False*



The correct answer is A. To view both Compensation and Allowances for an Employee, Managers should select the **Compensation** button

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- View a Direct Reports Allowances Information

Managing Direct and Indirect Reports

Lesson 7: Create a Delegation Rule for Approvals (Core HR)

Lesson Objective:

Upon the completion of the Create a Delegation Rule for Approvals Lesson, you will be able to:

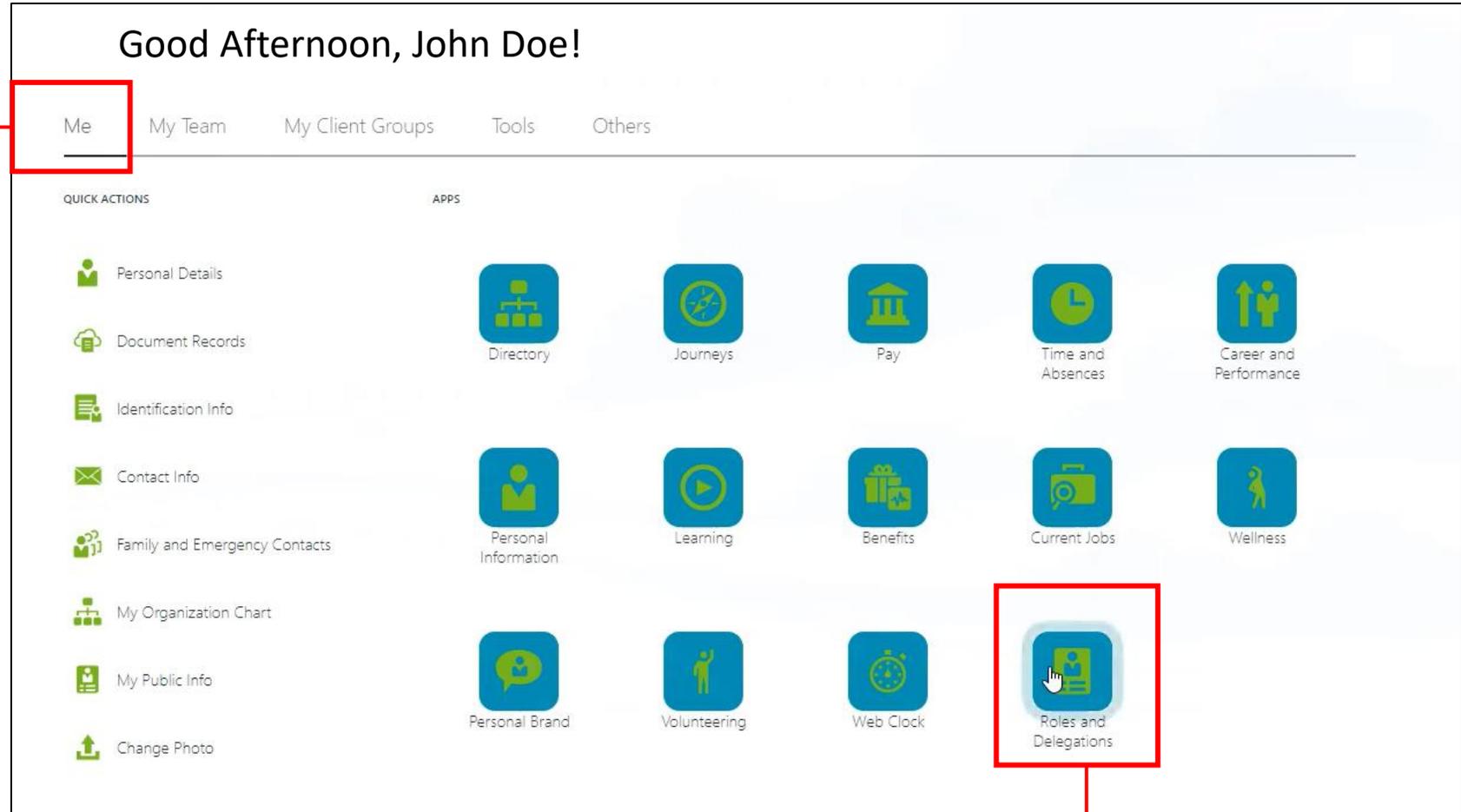
Objective

- Submit a Delegation Rule for new Approvals

Create a Delegation Rule for Approvals

1

Select the **Me** tab from the CV360 homepage



Good Afternoon, John Doe!

Me My Team My Client Groups Tools Others

QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info
- Contact Info
- Family and Emergency Contacts
- My Organization Chart
- My Public Info
- Change Photo

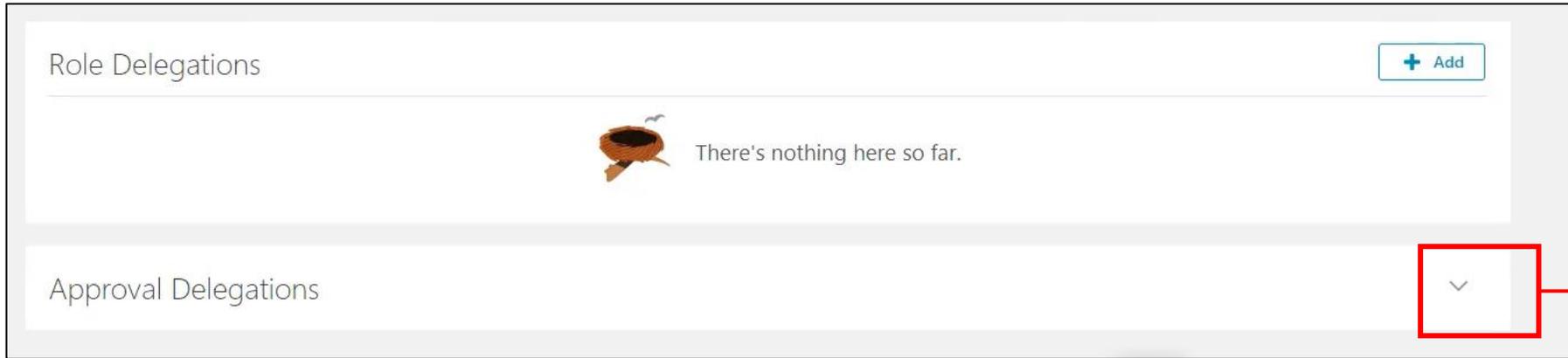
APPS

- Directory
- Journeys
- Pay
- Time and Absences
- Career and Performance
- Personal Information
- Learning
- Benefits
- Current Jobs
- Wellness
- Personal Brand
- Volunteering
- Web Clock
- Roles and Delegations

2

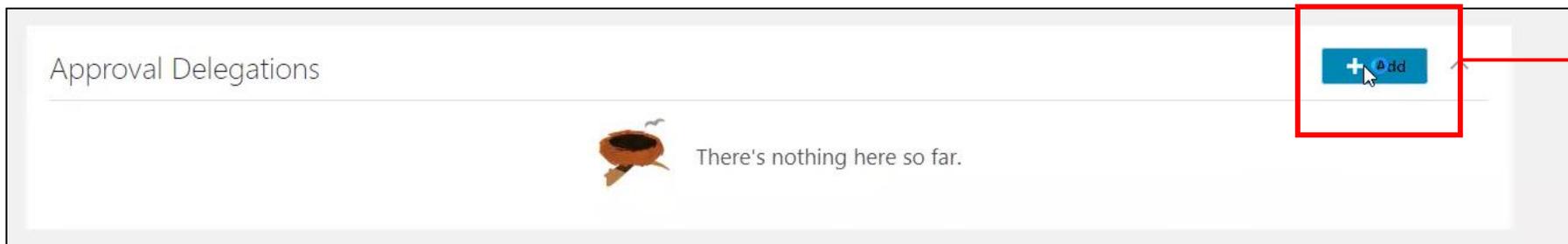
Select the **Roles and Delegations** tile from the Apps section

Create a Delegation Rule for Approvals



3

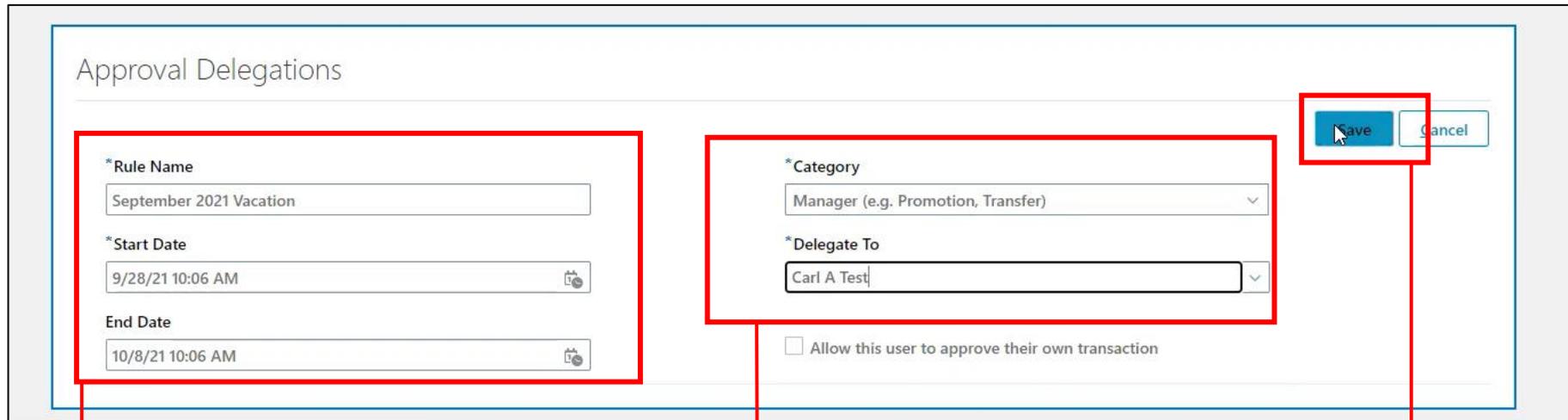
Select the drop-down chevron in the Approval Delegations section



4

Select the +Add button

Create a Delegation Rule for Approvals



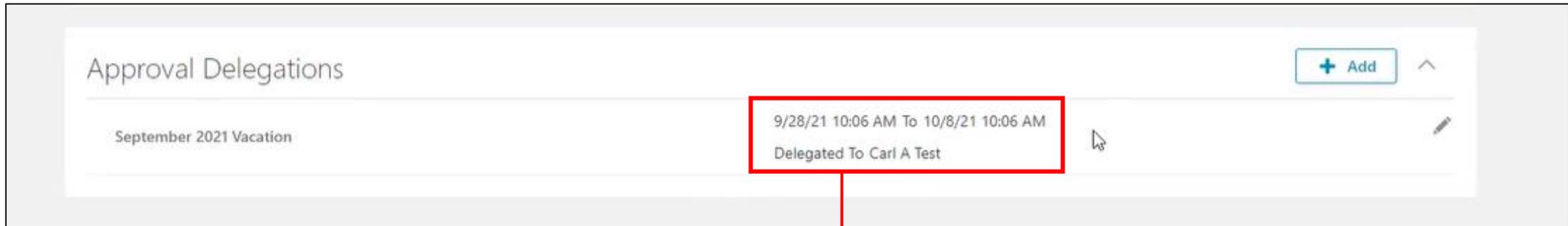
The screenshot shows the 'Approval Delegations' form. A red box highlights the 'Rule Name' field (containing 'September 2021 Vacation'), the 'Start Date' field (containing '9/28/21 10:06 AM'), and the 'End Date' field (containing '10/8/21 10:06 AM'). Another red box highlights the 'Category' dropdown (set to 'Manager (e.g. Promotion, Transfer)') and the 'Delegate To' dropdown (set to 'Carl A Test'). A third red box highlights the 'Save' button. A checkbox labeled 'Allow this user to approve their own transaction' is also visible.

5 Key in the appropriate **Rule Name**, **Start Date**, and **End Date** for the Approval Delegation you wish to create

6 Key in the appropriate information for the **Category** of the Approval Delegation and who you wish to **Delegate To**

7 Select the **Save** button

Create a Delegation Rule for Approvals



Approval Delegations

September 2021 Vacation

9/28/21 10:06 AM To 10/8/21 10:06 AM
Delegated To Carl A Test

+ Add



The delegated Employee Name should now appear under the Approval Delegations section

Create a Delegation Rule for Approvals: Knowledge Check

Managers do not have to select a specific Employee to Delegate Approvals to when creating a new Delegation Rule

True or False?

A. True

B. False



Create a Delegation Rule for Approvals: Knowledge Check

Managers do not have to select a specific Employee to Delegate Approvals to when creating a new Delegation Rule

True or False?

A. True

B. False



The correct answer is B. Managers must select a specific Employee to Delegate Approvals to when creating a new Delegation Rule

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- Submit a Delegation Rule for Approvals

Managing Direct and Indirect Reports

Lesson 8: View Team Representatives (Core HR)

Lesson Objective:

Upon the completion of the View Team Representatives Lesson, you will be able to:

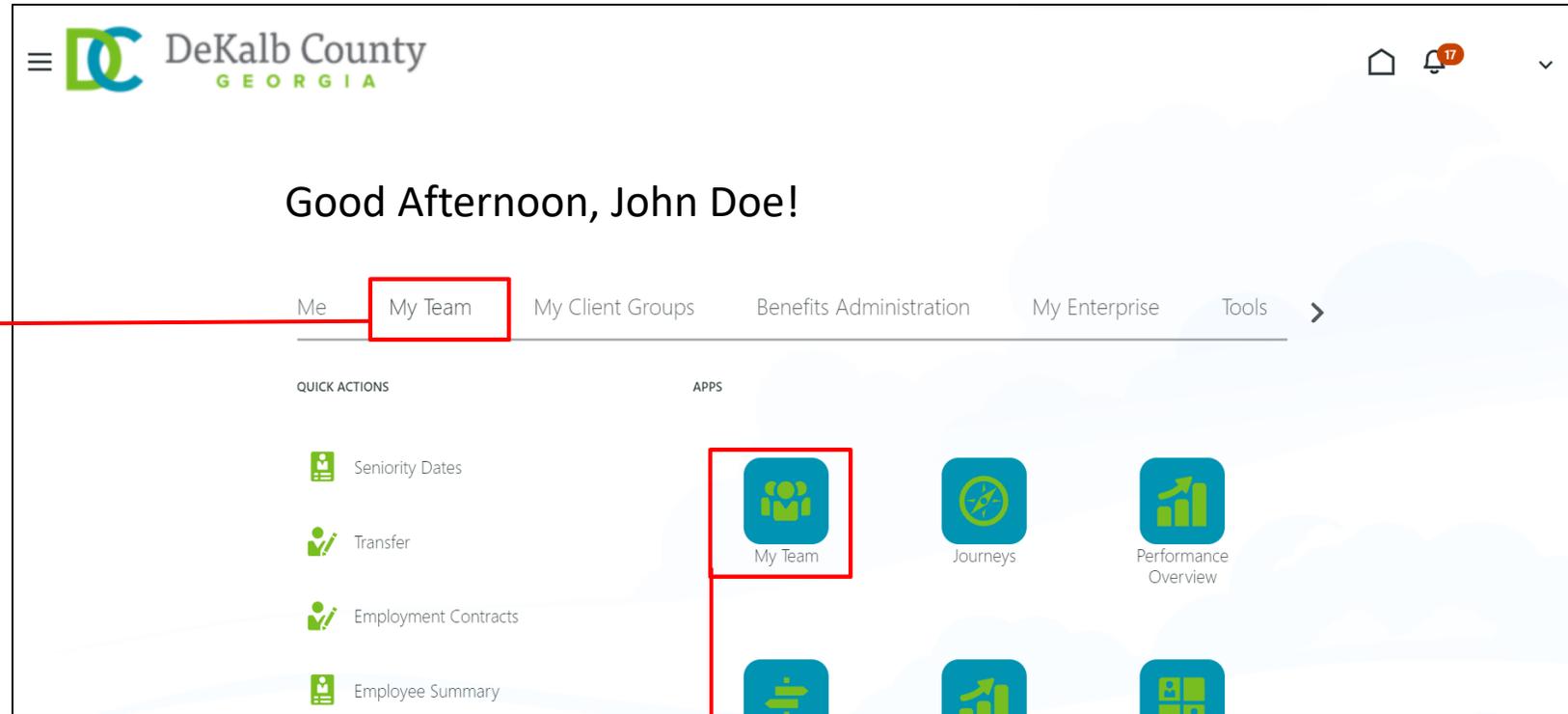
Objective

- Learn how to View Team Representatives

View Team Representatives

1

Select the **My Team** tab from the CV360 homepage



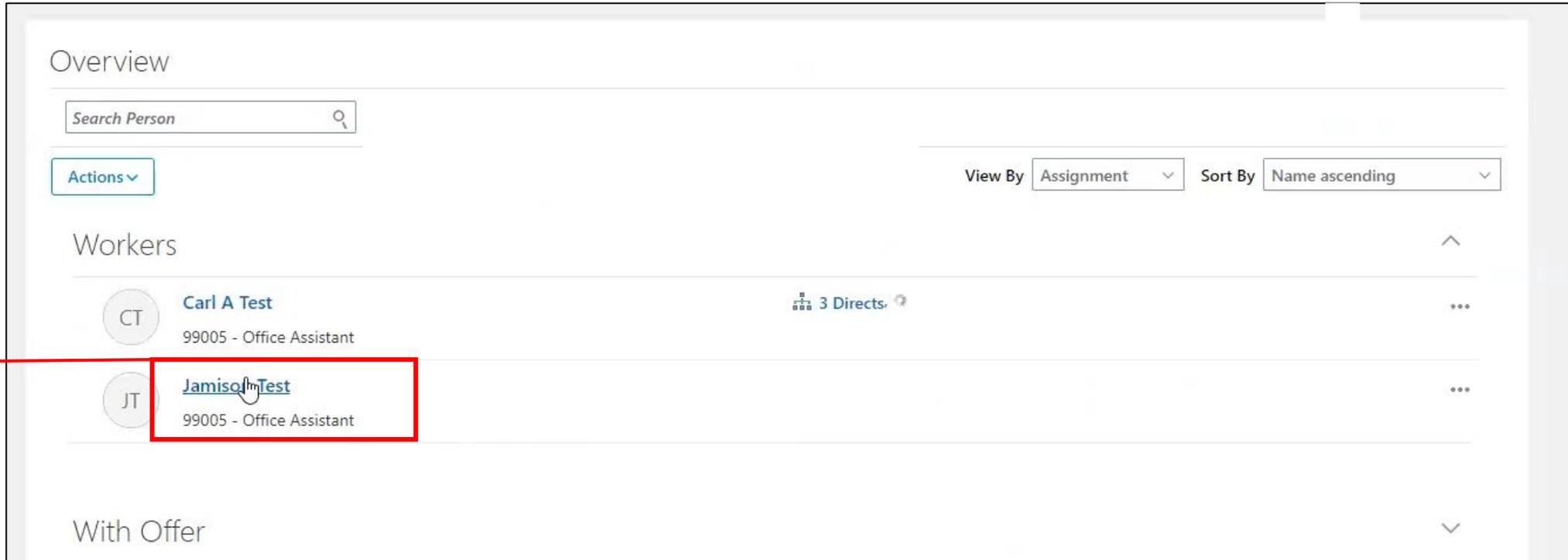
2

Select the **My Team** tile from the Apps section

View Team Representatives

3

Select the Employee Name link



Overview

Search Person

Actions

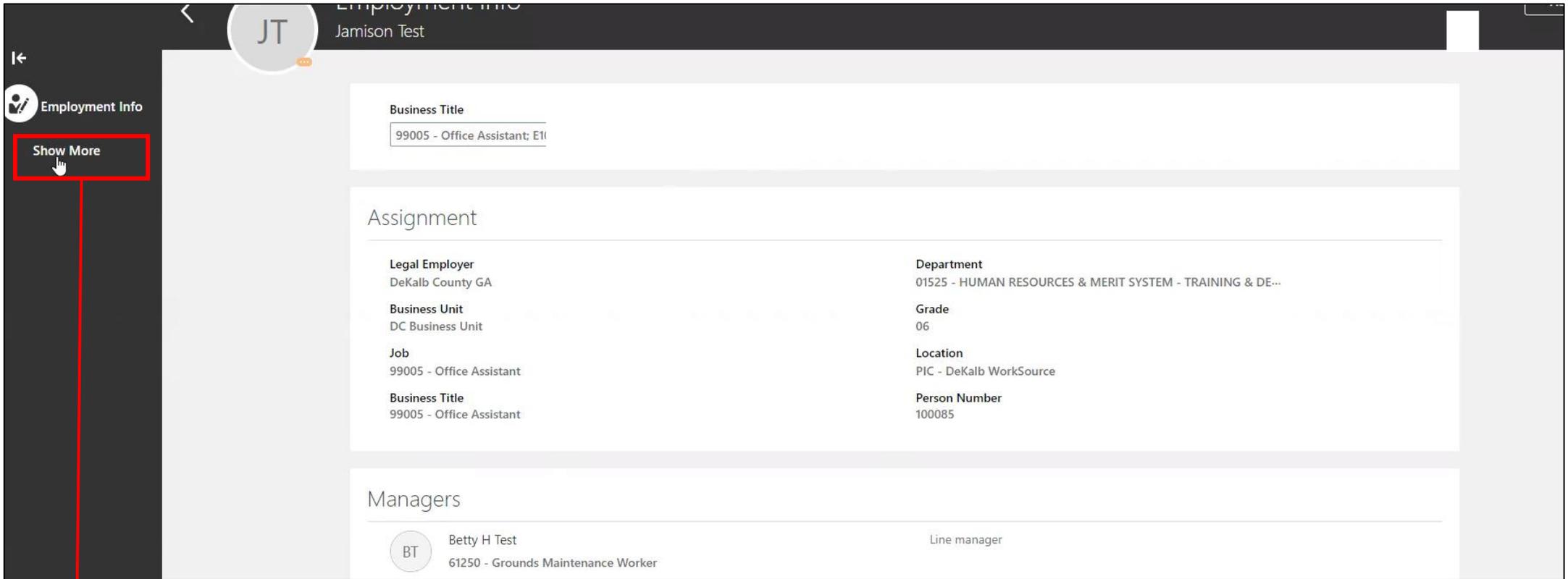
View By Sort By

Workers

CT	Carl A Test	99005 - Office Assistant	3 Directs	<input type="button" value="⋮"/>
JT	Jamison Test	99005 - Office Assistant		<input type="button" value="⋮"/>

With Offer

View Team Representatives



Employment Info

Business Title
99005 - Office Assistant; E1

Assignment

Legal Employer DeKalb County GA	Department 01525 - HUMAN RESOURCES & MERIT SYSTEM - TRAINING & DE...
Business Unit DC Business Unit	Grade 06
Job 99005 - Office Assistant	Location PIC - DeKalb WorkSource
Business Title 99005 - Office Assistant	Person Number 100085

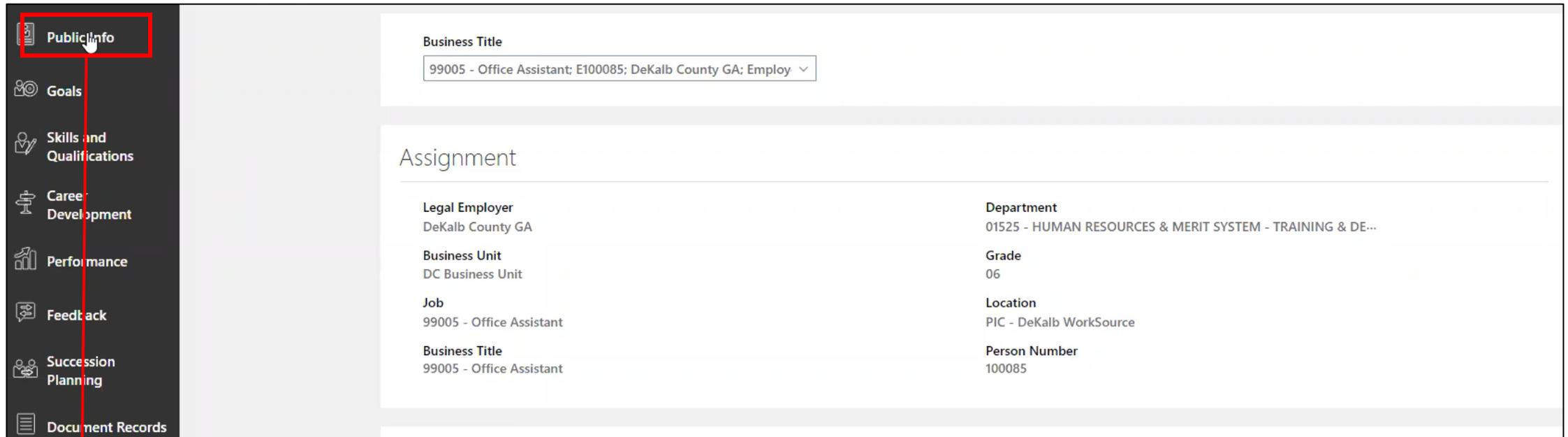
Managers

BT Betty H Test 61250 - Grounds Maintenance Worker	Line manager
--	--------------



Select the **Show More** button

View Team Representatives



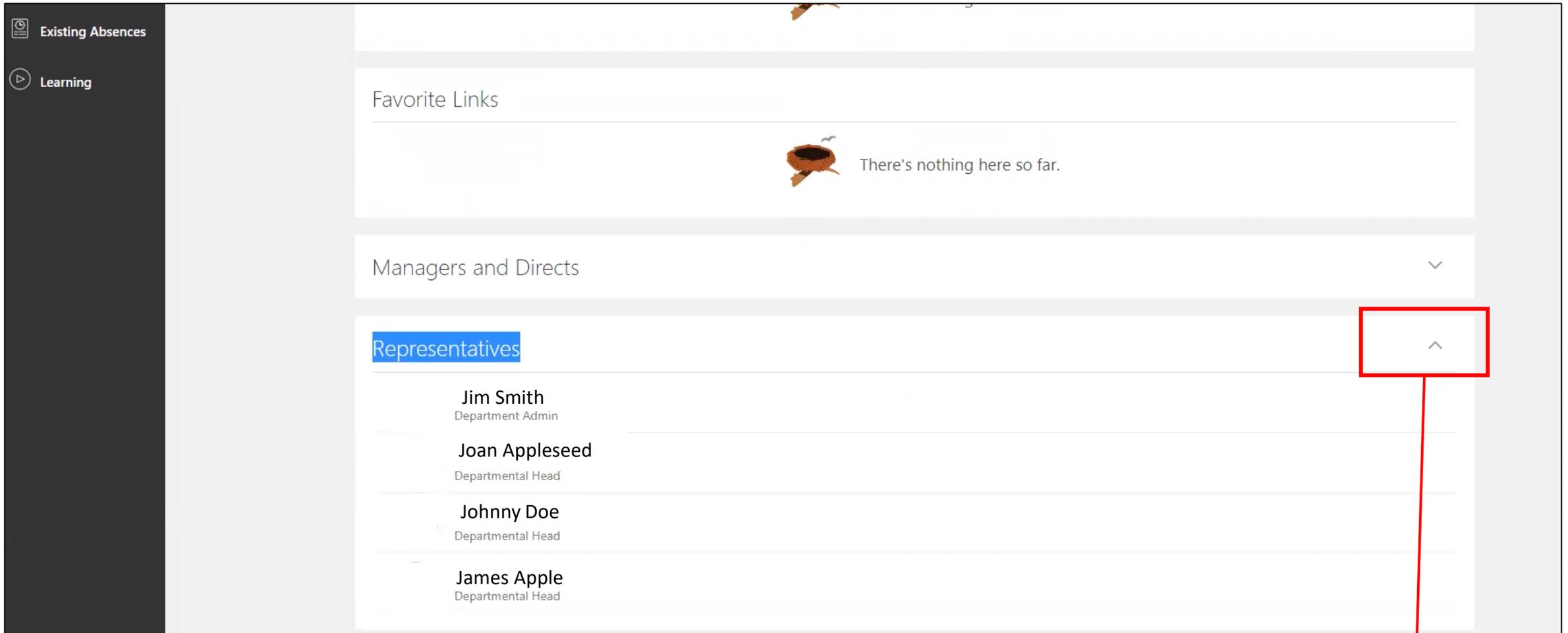
The screenshot shows a software interface with a dark left-hand navigation menu. The 'Public Info' button is highlighted with a red box and a red line pointing to a callout box. The main content area displays a dropdown menu for 'Business Title' with the selected value '99005 - Office Assistant; E100085; DeKalb County GA; Employ'. Below this is an 'Assignment' section with a table of details.

Assignment	
Legal Employer DeKalb County GA	Department 01525 - HUMAN RESOURCES & MERIT SYSTEM - TRAINING & DE...
Business Unit DC Business Unit	Grade 06
Job 99005 - Office Assistant	Location PIC - DeKalb WorkSource
Business Title 99005 - Office Assistant	Person Number 100085



Select the Public Info button

View Team Representatives



Existing Absences

Learning

Favorite Links

There's nothing here so far.

Managers and Directs

Representatives

- Jim Smith
Department Admin
- Joan Appleseed
Departmental Head
- Johnny Doe
Departmental Head
- James Apple
Departmental Head

Select the drop-down menu button to view the Representatives for that Report



View Team Representatives: Knowledge Check

Managers can view an Employee's Representatives by clicking on the Employee Name link

True or False?

A. True

B. False



View Team Representatives: Knowledge Check

Managers can view an Employee's Representatives by clicking on the Employee Name link

True or False?

A. *True*

B. *False*



The correct answer is A. Managers can view an Employee's Representatives by clicking on the **Employee Name** link

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- View an Employee's full list of Representatives

Managing Direct and Indirect Reports

Lesson 9: Approve/Reject Time Off Requests (Absence)

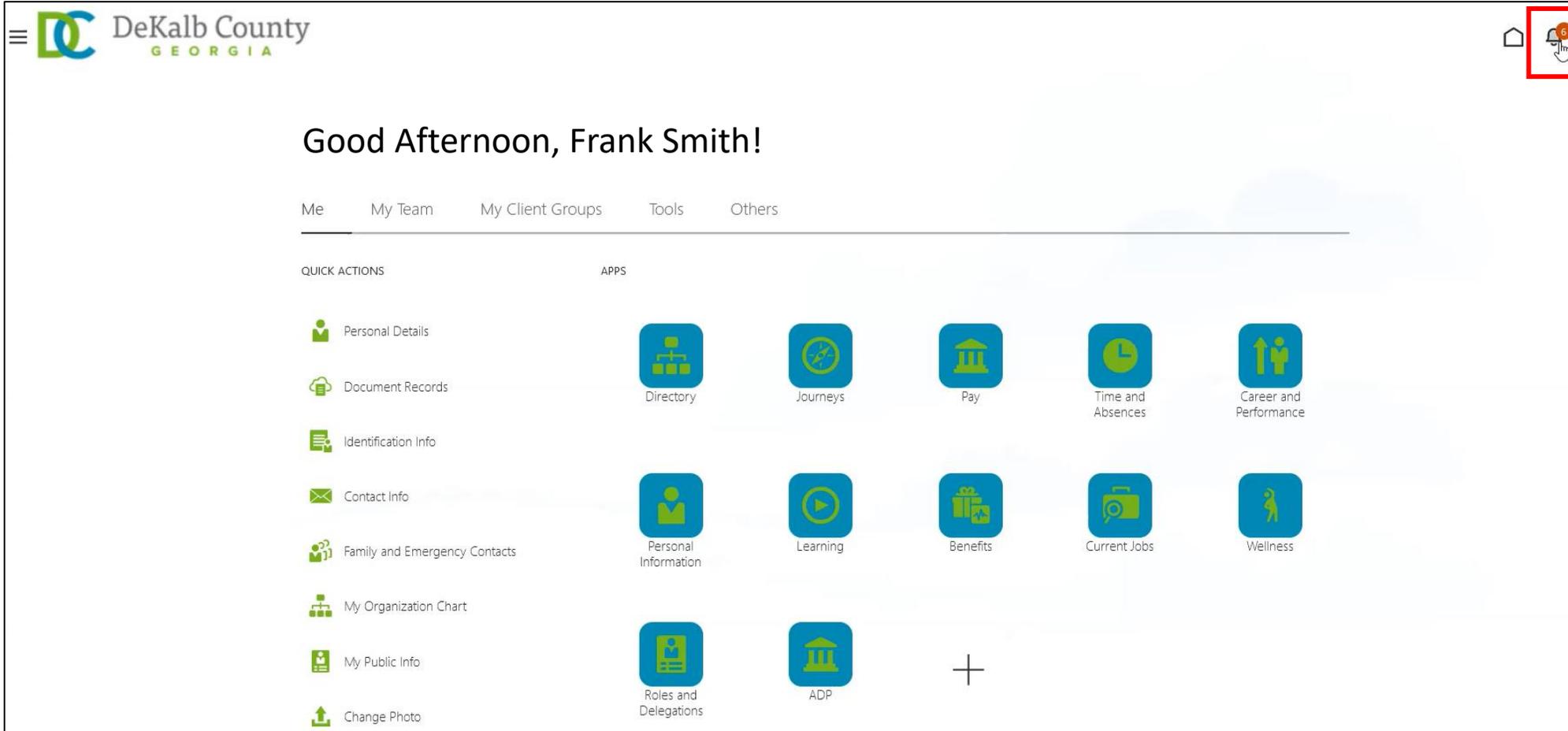
Lesson Objective:

Upon the completion of the Approve/Reject Time Off Requests Lesson, you will be able to:

Objective

- Approve or Reject Time Off Requests

Approve/Reject Time Off Requests



DeKalb County
GEORGIA

Good Afternoon, Frank Smith!

Me My Team My Client Groups Tools Others

QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info
- Contact Info
- Family and Emergency Contacts
- My Organization Chart
- My Public Info
- Change Photo

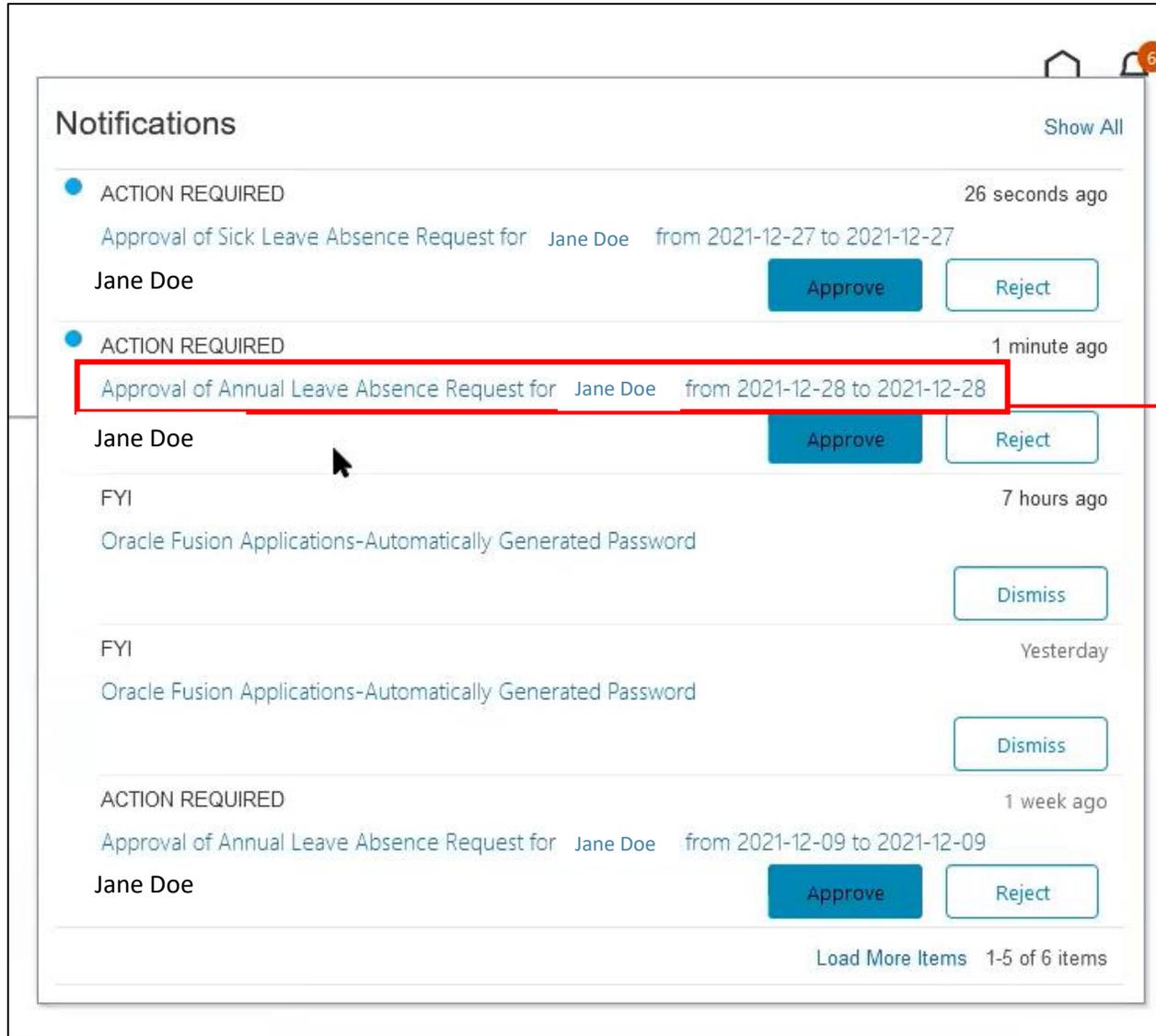
APPS

- Directory
- Journeys
- Pay
- Time and Absences
- Career and Performance
- Personal Information
- Learning
- Benefits
- Current Jobs
- Wellness
- Roles and Delegations
- ADP



Select the bell notifications button on the top right corner of the screen

Approve/Reject Time Off Requests



Notifications Show All

- ACTION REQUIRED** 26 seconds ago
Approval of Sick Leave Absence Request for Jane Doe from 2021-12-27 to 2021-12-27
Jane Doe Approve Reject
- ACTION REQUIRED** 1 minute ago
Approval of Annual Leave Absence Request for Jane Doe from 2021-12-28 to 2021-12-28
Jane Doe Approve Reject
- FYI** 7 hours ago
Oracle Fusion Applications-Automatically Generated Password
Dismiss
- FYI** Yesterday
Oracle Fusion Applications-Automatically Generated Password
Dismiss
- ACTION REQUIRED** 1 week ago
Approval of Annual Leave Absence Request for Jane Doe from 2021-12-09 to 2021-12-09
Jane Doe Approve Reject

[Load More Items](#) 1-5 of 6 items

2

Select the **link** for the request to view more information about that specific Time Off Request

Approve/Reject Time Off Requests

from 2021-12-28 to 2021-12-28

Actions **Approve** **Reject**

Absence Request Approval

Jane Doe

From 12/28/21 to 12/28/21

Total Duration 8.5 Hours

Absence Request Details

Absence Type Annual Leave

Absence Reason

Start Date 12/28/21 8.5 Hours

End Date 12/28/21

Duration 8.5 Hours

Comments

Approval History

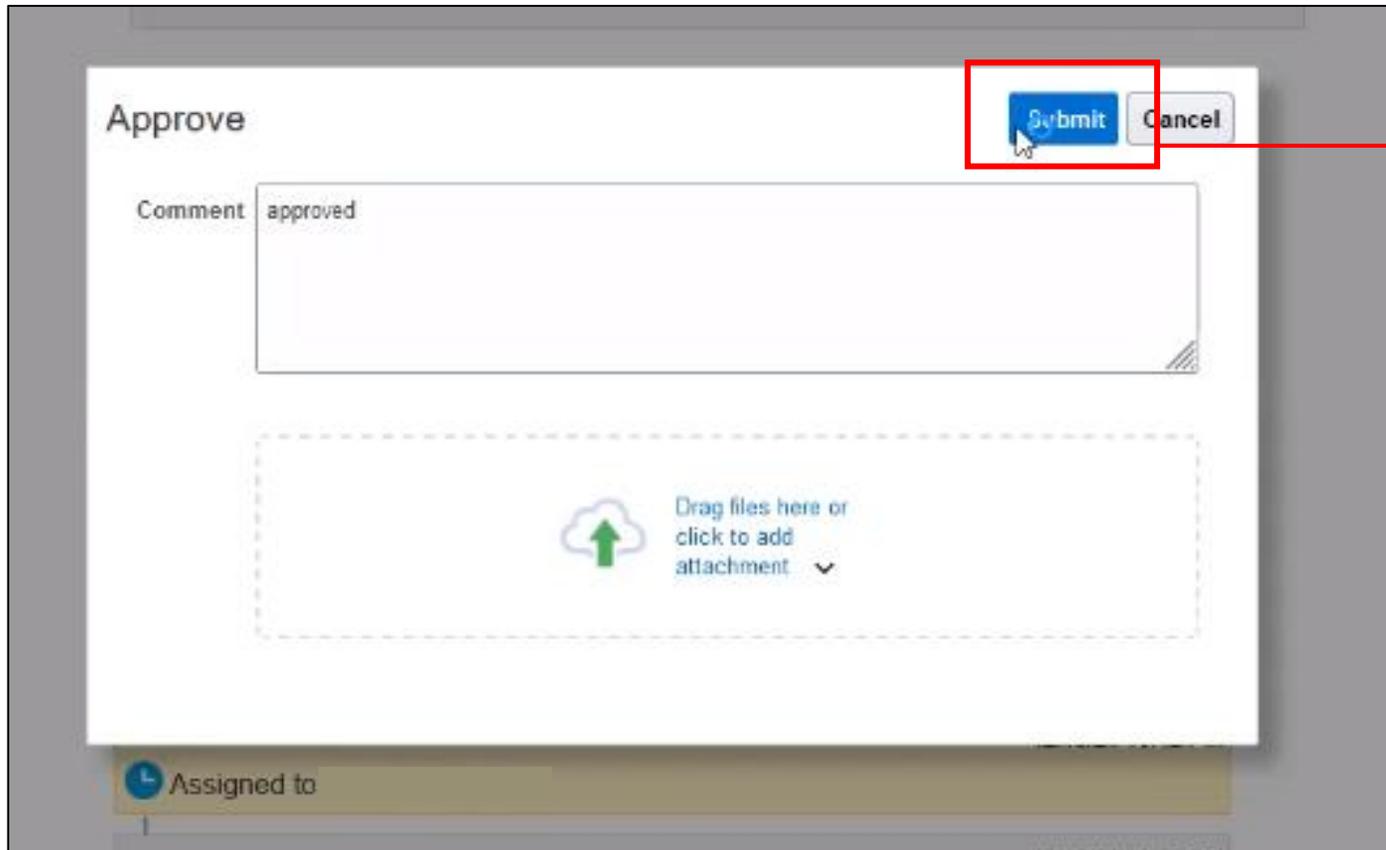
Assigned to Frank Smith 12/15/21 10:42 PM

Submitted by Jane Doe 12/15/21 10:42 PM



Select the **Approve** button to approve the Time Off Request

Approve/Reject Time Off Requests



Approve

Submit Cancel

Comment approved

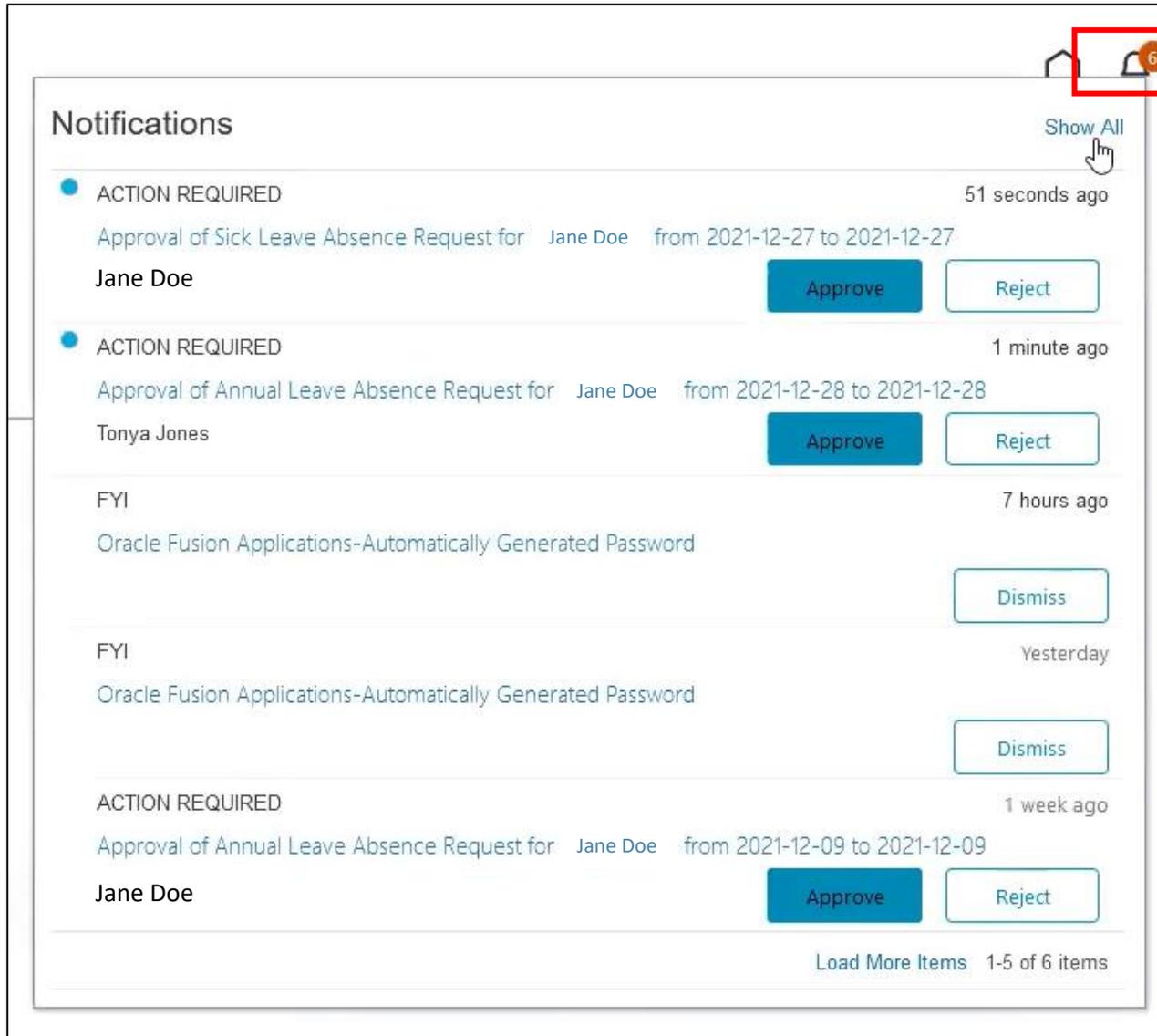
Drag files here or click to add attachment

Assigned to

4

Key in the appropriate comments in the field and select the **Submit** button

Approve/Reject Time Off Requests



Notifications

51 seconds ago

ACTION REQUIRED

Approval of Sick Leave Absence Request for Jane Doe from 2021-12-27 to 2021-12-27

Jane Doe

Approve Reject

1 minute ago

ACTION REQUIRED

Approval of Annual Leave Absence Request for Jane Doe from 2021-12-28 to 2021-12-28

Tonya Jones

Approve Reject

7 hours ago

FYI

Oracle Fusion Applications-Automatically Generated Password

Dismiss

Yesterday

FYI

Oracle Fusion Applications-Automatically Generated Password

Dismiss

1 week ago

ACTION REQUIRED

Approval of Annual Leave Absence Request for Jane Doe from 2021-12-09 to 2021-12-09

Jane Doe

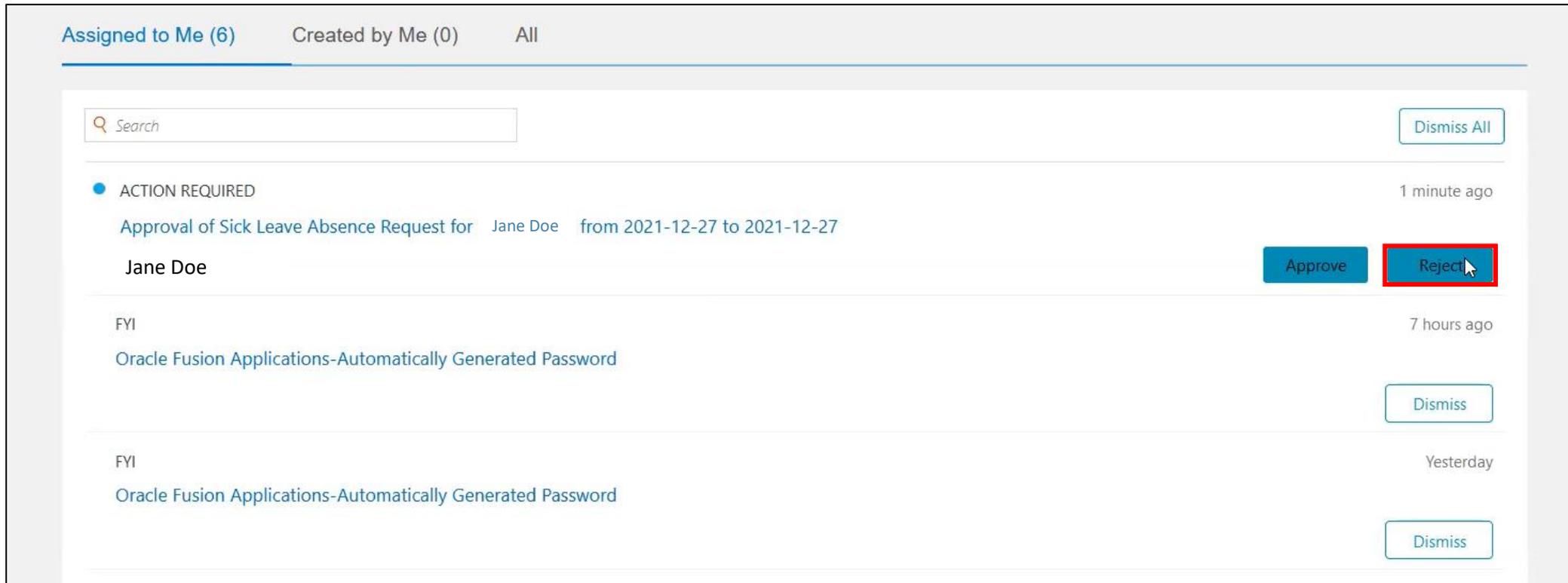
Approve Reject

Load More Items 1-5 of 6 items

5

From the home page, select the bell notification button again, and select the **Show All** button from this drop-down list

Approve/Reject Time Off Requests



The screenshot shows a notification interface with the following elements:

- Navigation tabs: "Assigned to Me (6)", "Created by Me (0)", and "All".
- Search bar: A text input field with a magnifying glass icon and the placeholder text "Search".
- Dismiss All button: A button in the top right corner.
- Notification 1: "ACTION REQUIRED" (1 minute ago). Content: "Approval of Sick Leave Absence Request for Jane Doe from 2021-12-27 to 2021-12-27". Name: "Jane Doe". Action buttons: "Approve" and "Reject" (highlighted with a red box).
- Notification 2: "FYI" (7 hours ago). Content: "Oracle Fusion Applications-Automatically Generated Password". Action button: "Dismiss".
- Notification 3: "FYI" (Yesterday). Content: "Oracle Fusion Applications-Automatically Generated Password". Action button: "Dismiss".

6

From here, you have the option to Approve or Reject a request directly from the notifications area. Select the **Reject** button to reject a Time Off Request

Approve/Reject Time Off Requests: Knowledge Check

Managers can Approve or Reject a Time Off Request directly from their notifications menu

True or False?

A. True

B. False



Approve/Reject Time Off Requests: Knowledge Check

Managers can Approve or Reject a Time Off Request directly from their notifications menu
True or False?

A. *True*

B. *False*



The correct answer is A. Managers can Approve or Reject a Time Off Request directly from their notifications menu

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- Approve a Time Off Request for an employee after viewing the Time Off Request details

Managing Direct and Indirect Reports

Lesson 10: View an Employee's Existing Leave Balances (Absence)

Lesson Objective:

Upon the completion of the View an Employee's Existing Leave Balances Lesson, you will be able to:

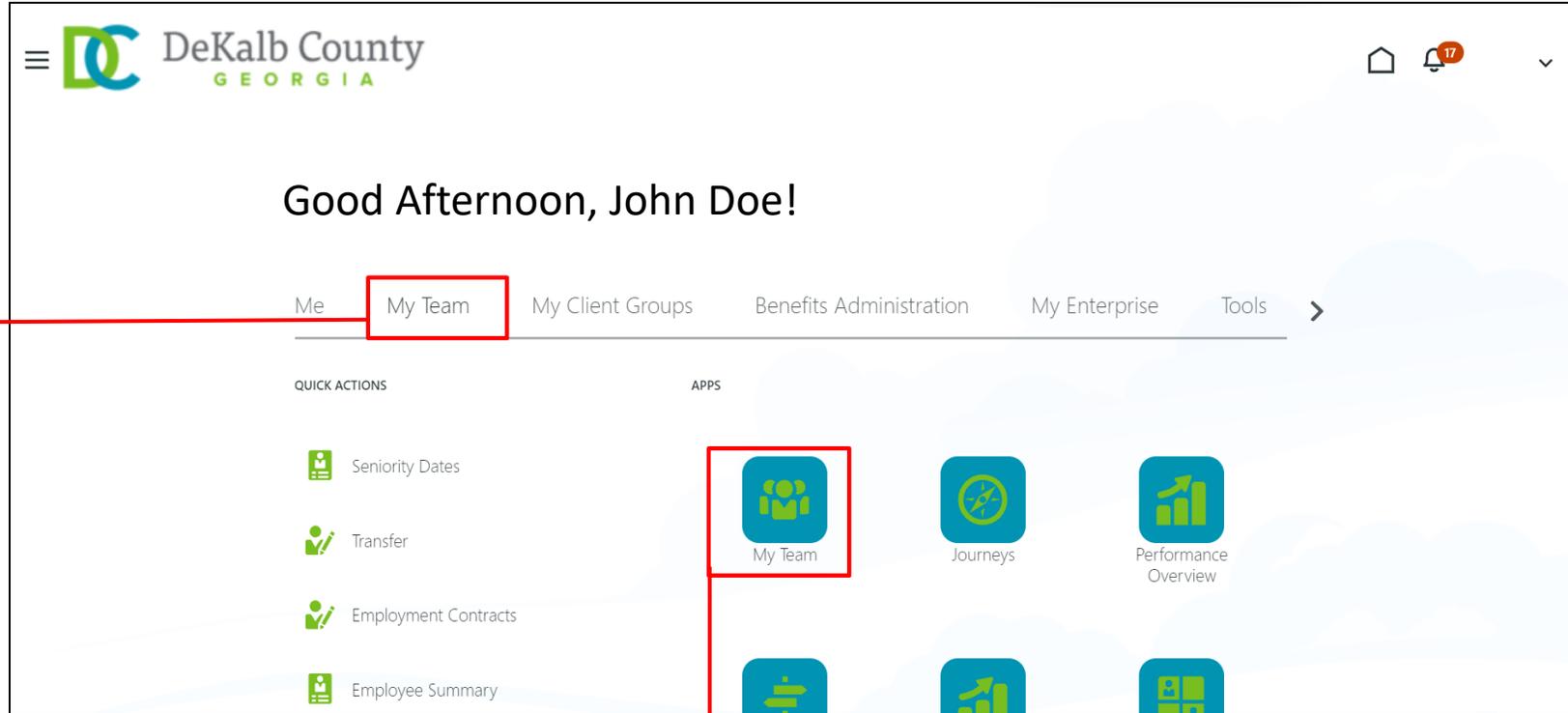
Objective

- View an Employee's Existing Leave Balances

View an Employee's Existing Leave Balances

1

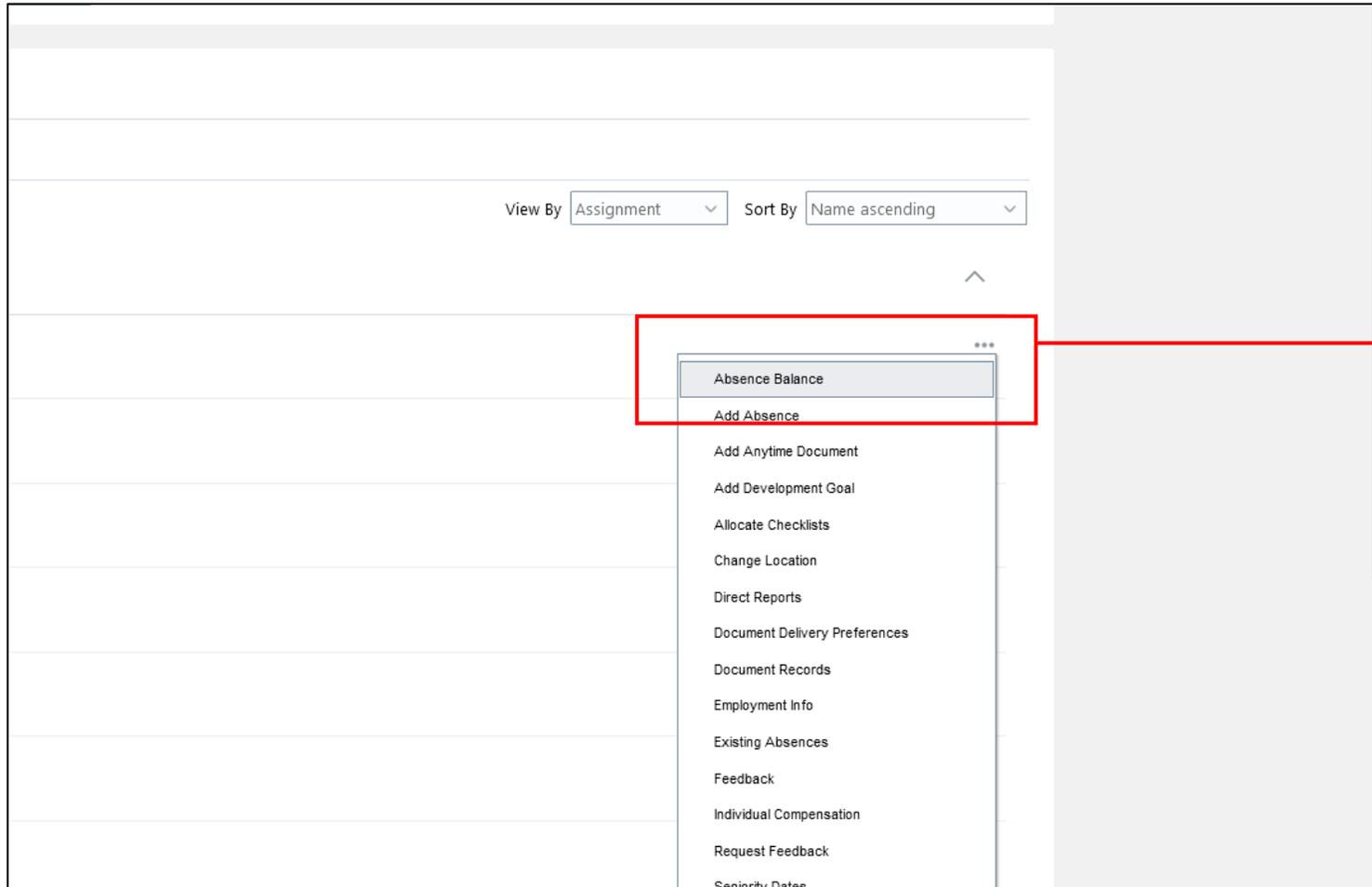
Select the **My Team** tab from the CV360 homepage



2

Select the **My Team** tile from the Apps section

View an Employee's Existing Leave Balances



View By Sort By

^

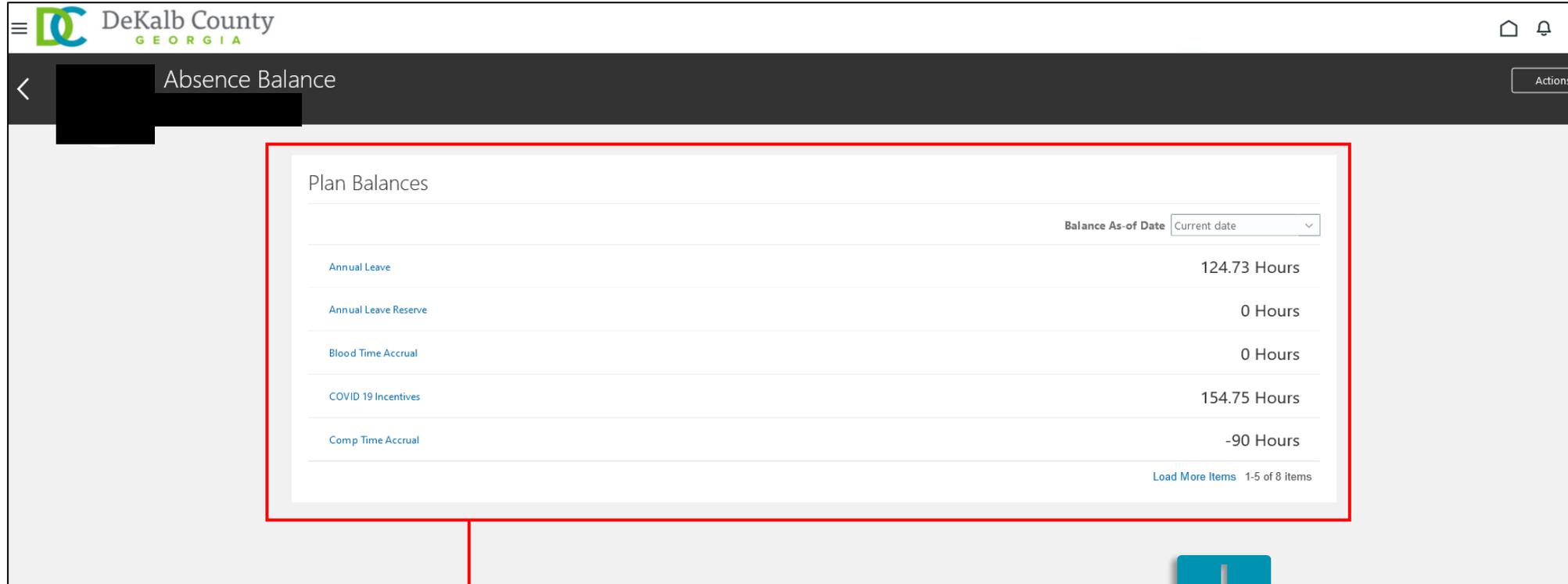
...

- Absence Balance
- Add Absence
- Add Anytime Document
- Add Development Goal
- Allocate Checklists
- Change Location
- Direct Reports
- Document Delivery Preferences
- Document Records
- Employment Info
- Existing Absences
- Feedback
- Individual Compensation
- Request Feedback
- Seniority Dates

3

Select the **Ellipses** on the right side of the page, then select **Absence Balance** from the drop-down list

View an Employee's Existing Leave Balances



DeKalb County
GEORGIA

Absence Balance

Plan Balances

Balance As-of Date: Current date

Annual Leave	124.73 Hours
Annual Leave Reserve	0 Hours
Blood Time Accrual	0 Hours
COVID 19 Incentives	154.75 Hours
Comp Time Accrual	-90 Hours

[Load More Items](#) 1-5 of 8 items

Actions

4

View the Employee's current Leave Balance on the Absence Balance page

Managers can select the **Actions** button to Add an Absence on the Plan Balances Page

View an Employee's Existing Leave Balances: Knowledge Check

Managers can add an Absence for an Employee directly from their Absence Balance page

True or False?

A. True

B. False



View an Employee's Existing Leave Balances: Knowledge Check

Managers can add an Absence for an Employee directly from their Absence Balance page

True or False?

A. **True**

B. False



The correct answer is A. Managers can add an Absence for an Employee directly from their Absence Balance page

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- View an Employee's Absence Balance page

Managing Direct and Indirect Reports

Lesson 11: Request Absence on Behalf of an Employee (Absence)

Lesson Objective:

Upon the completion of the Request Absence on Behalf of an Employee Lesson, you will be able to:

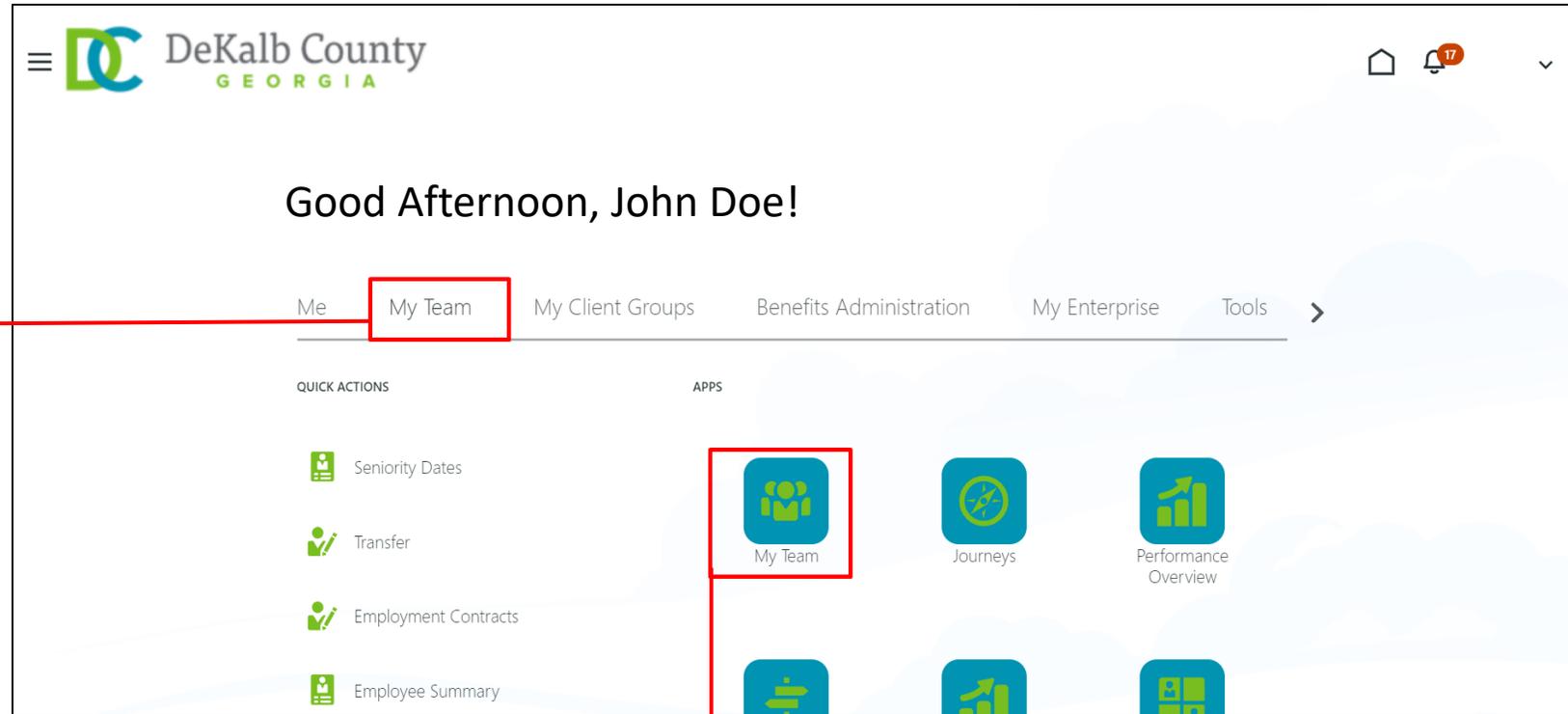
Objective

- Request Absence on Behalf of an Employee

Request Absence on Behalf of an Employee

1

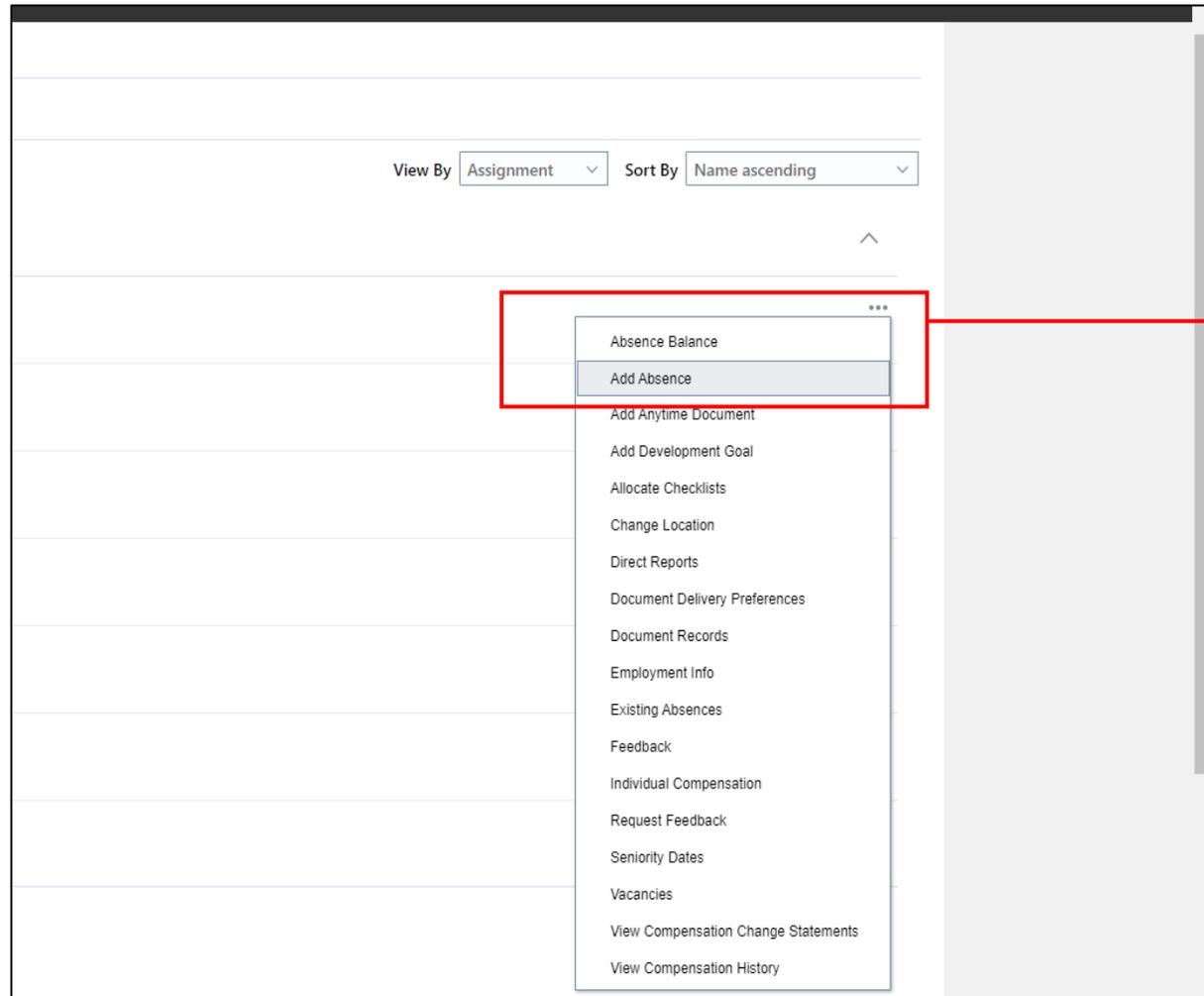
Select the **My Team** tab from the CV360 homepage



2

Select the **My Team** tile from the Apps section

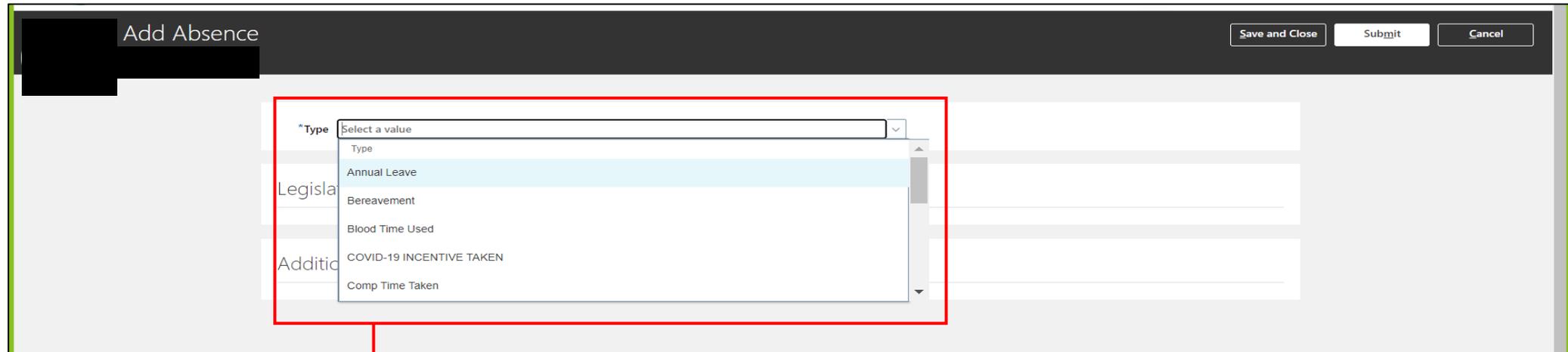
Request Absence on Behalf of an Employee



3

Select the **Ellipses** on the right side of the page, then select **Add Absence** from the drop-down list

Request Absence on Behalf of an Employee



The screenshot shows a web form titled "Add Absence". At the top right, there are three buttons: "Save and Close", "Submit", and "Cancel". A dropdown menu for "Type" is open, showing a list of options: "Annual Leave", "Bereavement", "Blood Time Used", "COVID-19 INCENTIVE TAKEN", and "Comp Time Taken". The "Annual Leave" option is highlighted in light blue. A red box highlights the dropdown menu. To the left of the dropdown, there are labels for "Legisla" and "Additio".

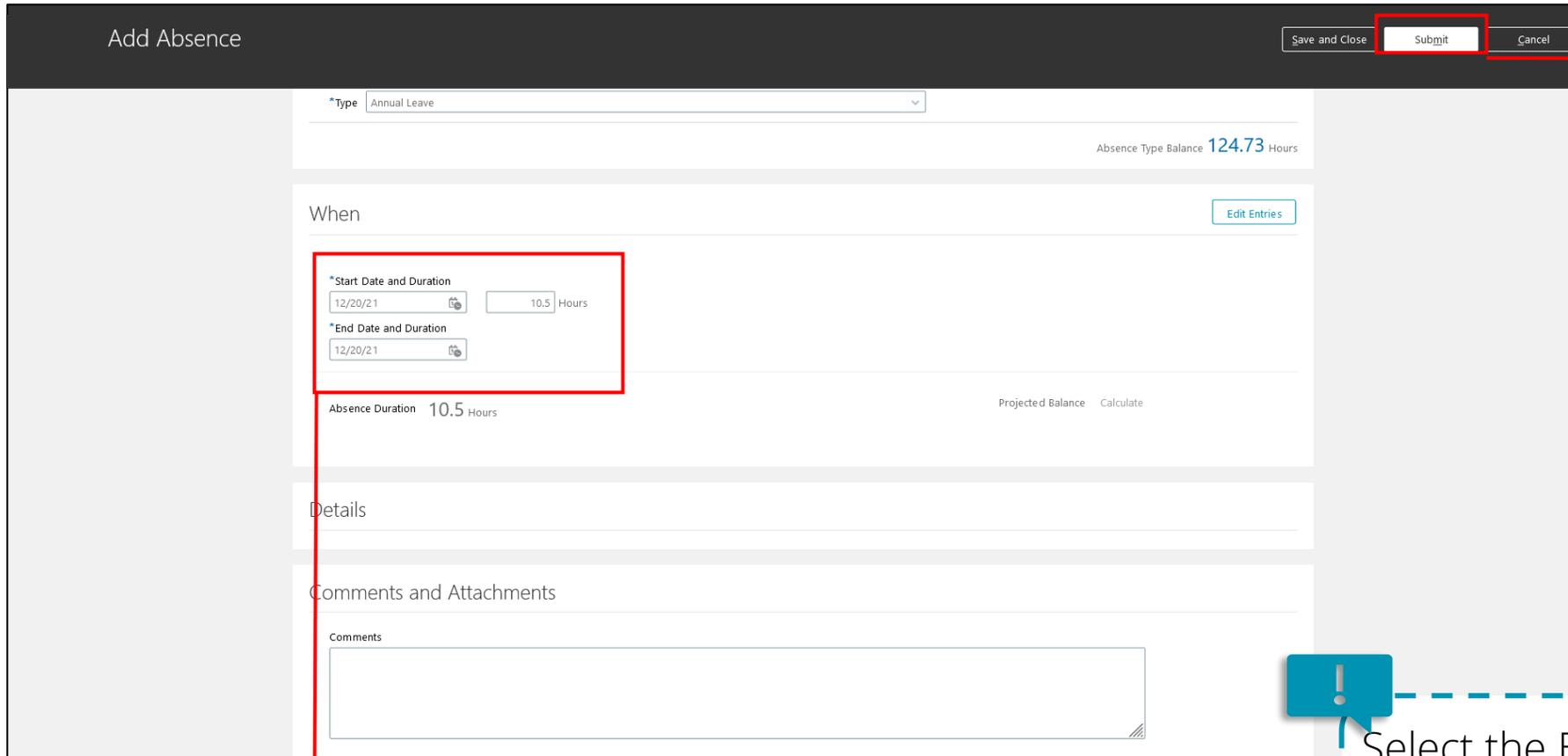
4

Select the appropriate **Leave Type** from the drop-down list that you wish to request for the Employee



For Accrual Leave types, the Employee must have an available balance unless it is automatically provided to the Employee by DeKalb County. The type of Leave available to the Employee will be displayed in the drop-down list

Request Absence on Behalf of an Employee



Add Absence

Save and Close Submit Cancel

Type Annual Leave

Absence Type Balance 124.73 Hours

When Edit Entries

*Start Date and Duration
12/20/21 10.5 Hours

*End Date and Duration
12/20/21

Absence Duration 10.5 Hours

Projected Balance Calculate

Details

Comments and Attachments

Comments

6

Select the **Submit** button to submit the request

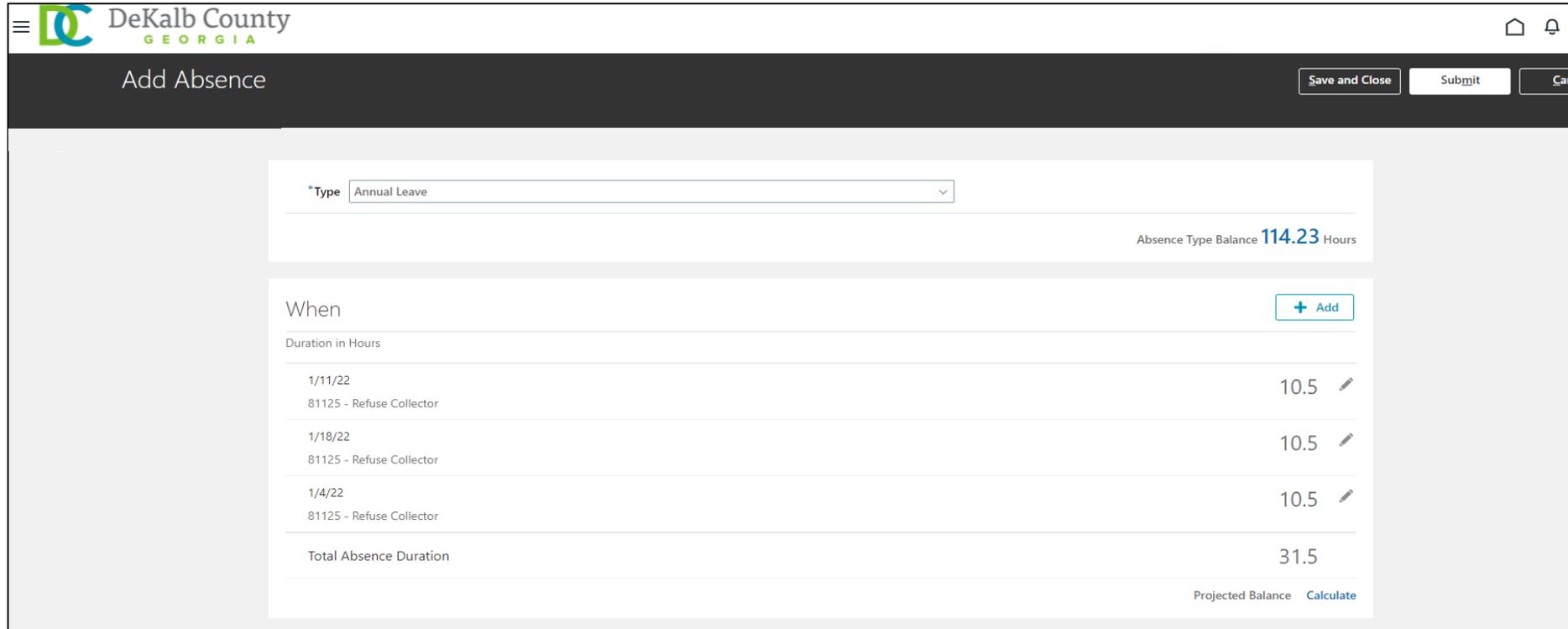
5

Select the appropriate **Start Date and Duration** and **End Date and Duration**. The Hours may be overridden if necessary.



Select the Edit entries button and enter the absence duration for each day being requested.

Request Absence on Behalf of an Employee



DeKalb County
GEORGIA

Add Absence

Save and Close Submit Cancel

Type Annual Leave

Absence Type Balance 114.23 Hours

When + Add

Duration in Hours	
1/11/22 81125 - Refuse Collector	10.5
1/18/22 81125 - Refuse Collector	10.5
1/4/22 81125 - Refuse Collector	10.5
Total Absence Duration	31.5

Projected Balance Calculate



Select the **Edit** Pencil Icon to edit the Absence Request. Completed Absences cannot be edited by the Employee or the Manager based on DeKalb Business Requirements

Request Absence on Behalf of an Employee: Knowledge Check

Managers can add a specific type of Absence on behalf of an Employee

True or False?

A. True

B. False



Request Absence on Behalf of an Employee: Knowledge Check

Managers can add a specific type of Absence on behalf of an Employee

True or False?

A. *True*

B. *False*



The correct answer is A. Managers can add a specific type of Absence on behalf of an Employee

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- Add a Bereavement Absence on behalf of an Employee

Managing Direct and Indirect Reports

Lesson 12: View an Employee's Existing Absences (Absence)

Lesson Objective:

Upon the completion of the View an Employee's Existing Absences Lesson, you will be able to:

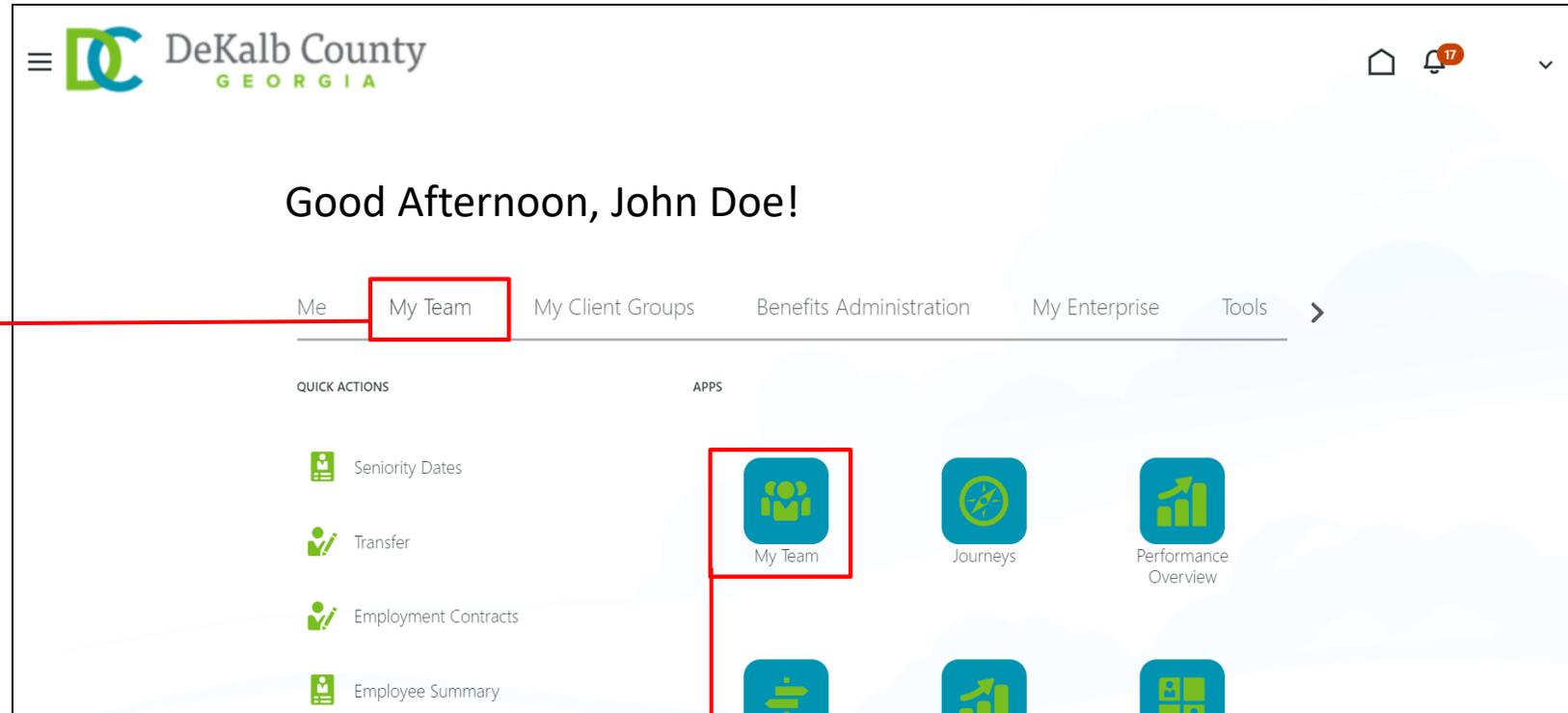
Objective

- View an Employee's Existing Absences

View an Employee's Existing Absences

1

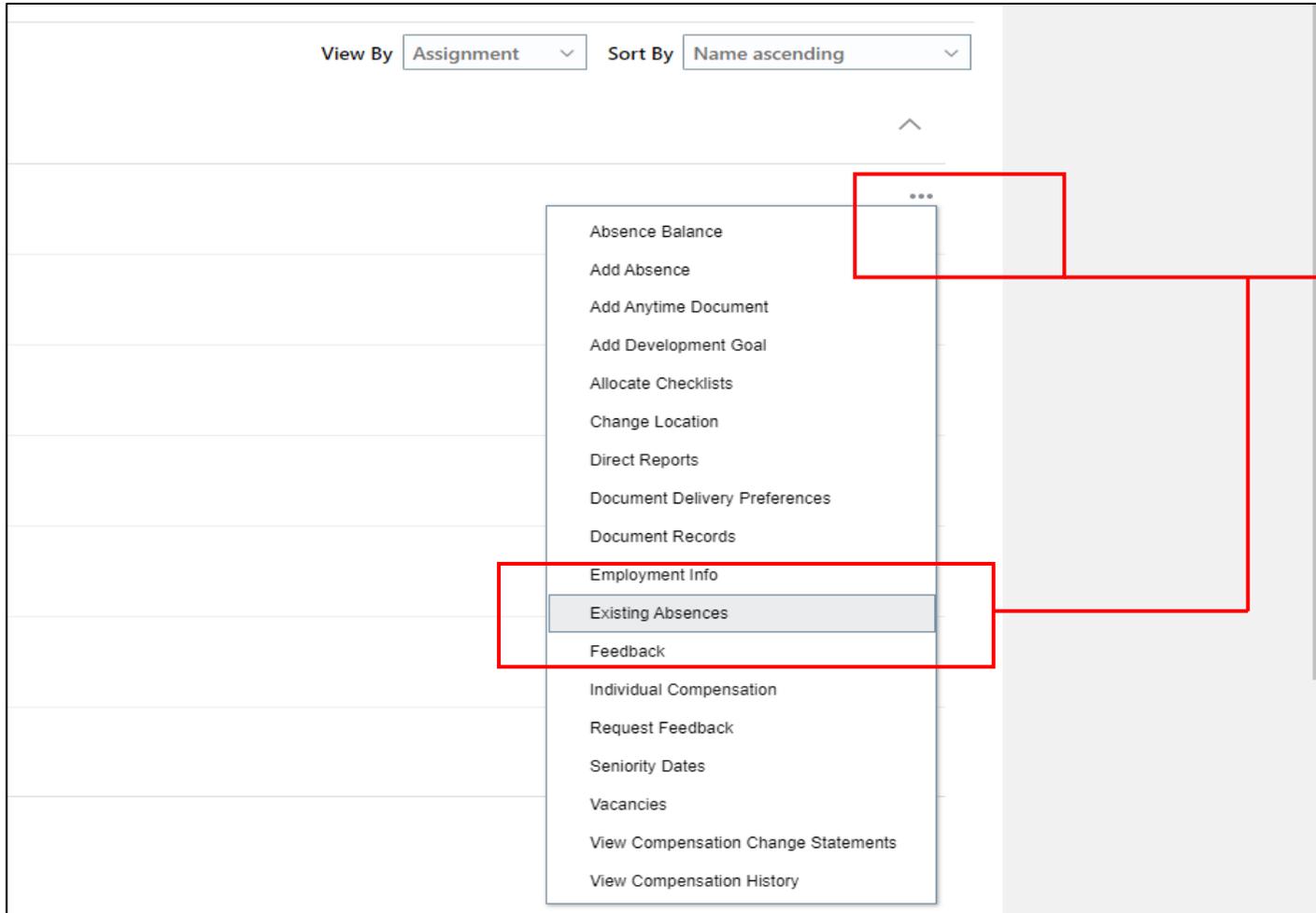
Select the **My Team** tab from the CV360 homepage



2

Select the **My Team** tile from the Apps section

View an Employee's Existing Absences



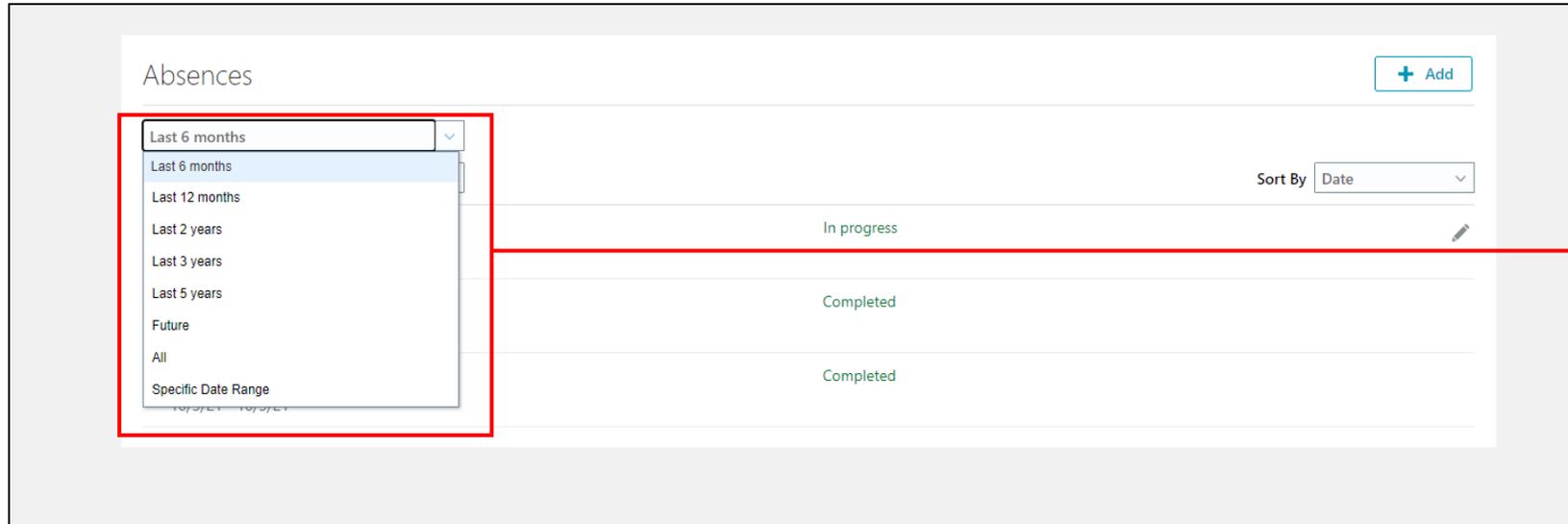
The screenshot displays a user interface with two dropdown menus at the top: 'View By' set to 'Assignment' and 'Sort By' set to 'Name ascending'. Below these is a table with a red box highlighting an ellipsis menu icon in the right-hand column. A dropdown menu is open, listing various options. A red box highlights the 'Existing Absences' option, which is currently selected. A red line connects this menu to a blue circle containing the number '3' on the right side of the page.

- Absence Balance
- Add Absence
- Add Anytime Document
- Add Development Goal
- Allocate Checklists
- Change Location
- Direct Reports
- Document Delivery Preferences
- Document Records
- Employment Info
- Existing Absences**
- Feedback
- Individual Compensation
- Request Feedback
- Seniority Dates
- Vacancies
- View Compensation Change Statements
- View Compensation History

3

Select the **Ellipses** on the right side of the page, then select **Existing Absences** from the drop-down list

View an Employee's Existing Absences



Absences + Add

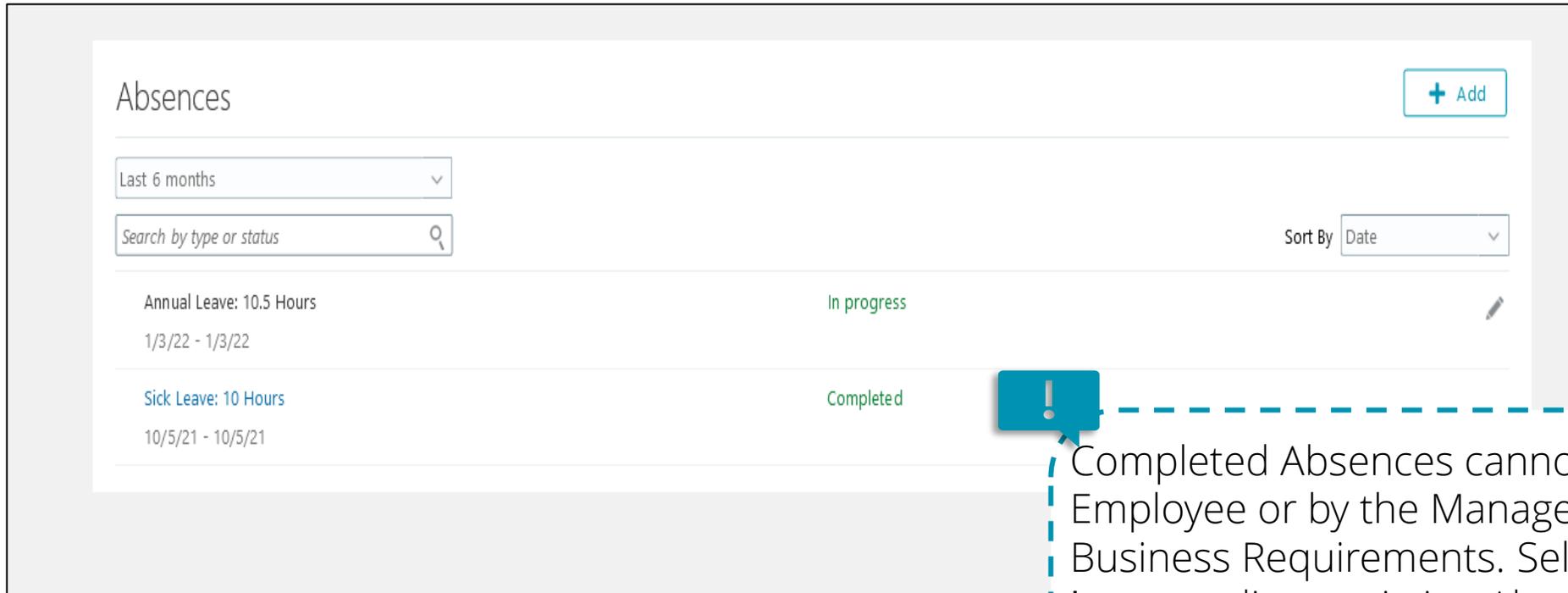
Sort By Date

In progress	
Completed	
Completed	



Select the appropriate **Time Frame** from the drop-down list

View an Employee's Existing Absences



Type	Amount	Dates	Status	Action
Annual Leave	10.5 Hours	1/3/22 - 1/3/22	In progress	Edit
Sick Leave	10 Hours	10/5/21 - 10/5/21	Completed	Warning

Completed Absences cannot be edited by the Employee or by the Manager based on DeKalb Business Requirements. Select the **Edit Pencil Icon** to edit an existing Absence Request. Managers can use the **+Add** button to submit an Absence Request on behalf of an Employee from the View Existing Absences Page

View an Employee's Existing Absences : Knowledge Check

Managers can add a new Absence for an Employee from the Existing Absences page

True or False?

A. True

B. False



View an Employee's Existing Absences : Knowledge Check

Managers can add a new Absence for an Employee from the Existing Absences page
True or False?

A. *True*

B. *False*



The correct answer is A. Managers can add a new Absence for an Employee from the Existing Absences page

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- View an Employee's Existing Absences

Managing Direct and Indirect Reports

Lesson 13: Create a Delegation for Absence Approvals (Absence)

Lesson Objective:

Upon the completion of the Create a Delegation for Absence Approvals Lesson, you will be able to:

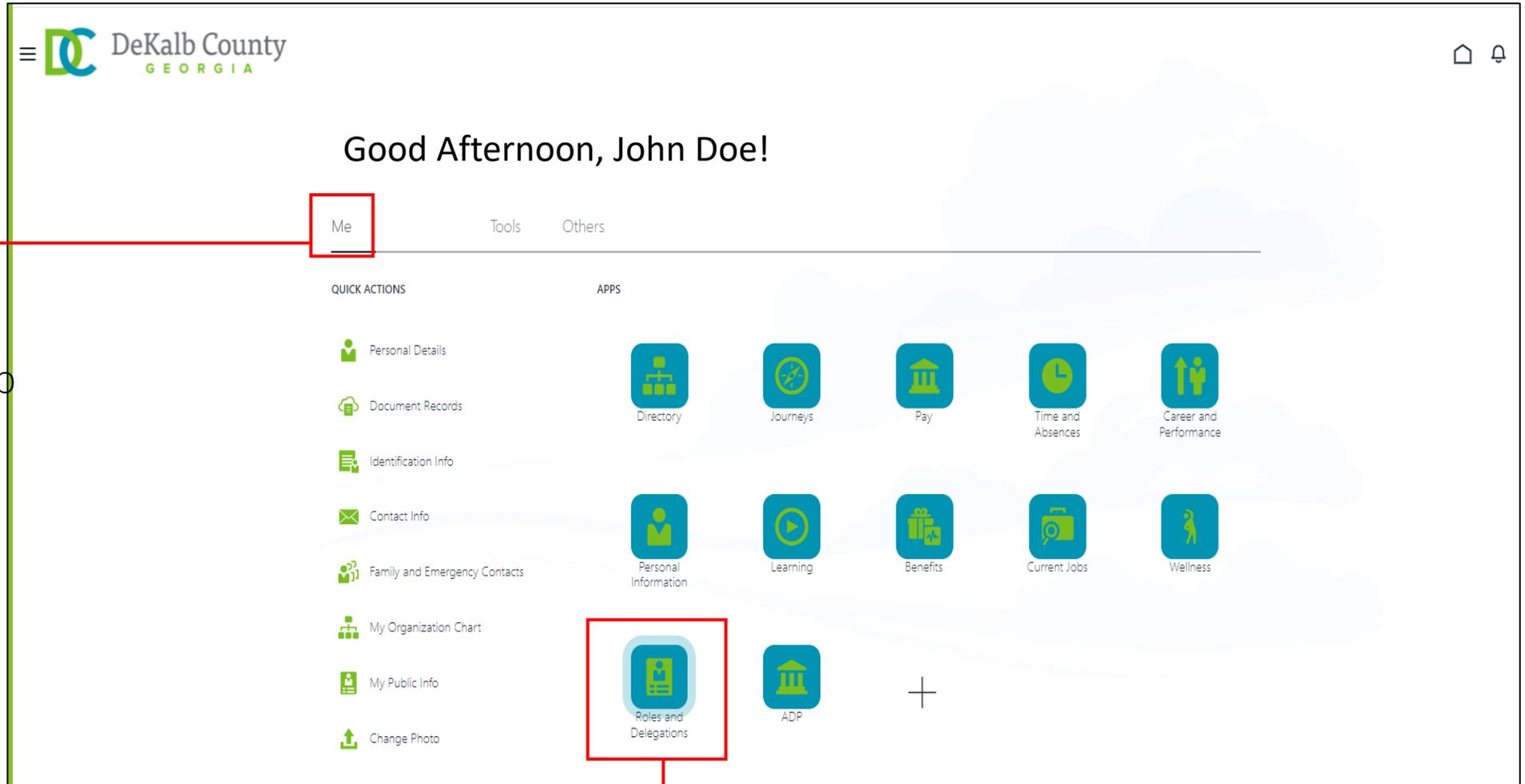
Objective

- Create a Delegation for Absence Approvals

Create a Delegation for Absence Approvals

1

Select the **Me** tab from the top of the CV360 Homepage



2

Select the Roles and Delegations tile

Create a Delegation for Absence Approvals

Person Number
025710

Account Status
Active

User Name
025710

Roles

DC SS Employees JR	From 9/12/05
DC SS Manager JR	From 10/29/21
DC TM Talent Manager JR	From 11/17/21

Role Delegations

[+ Add](#)

 There's nothing here so far.

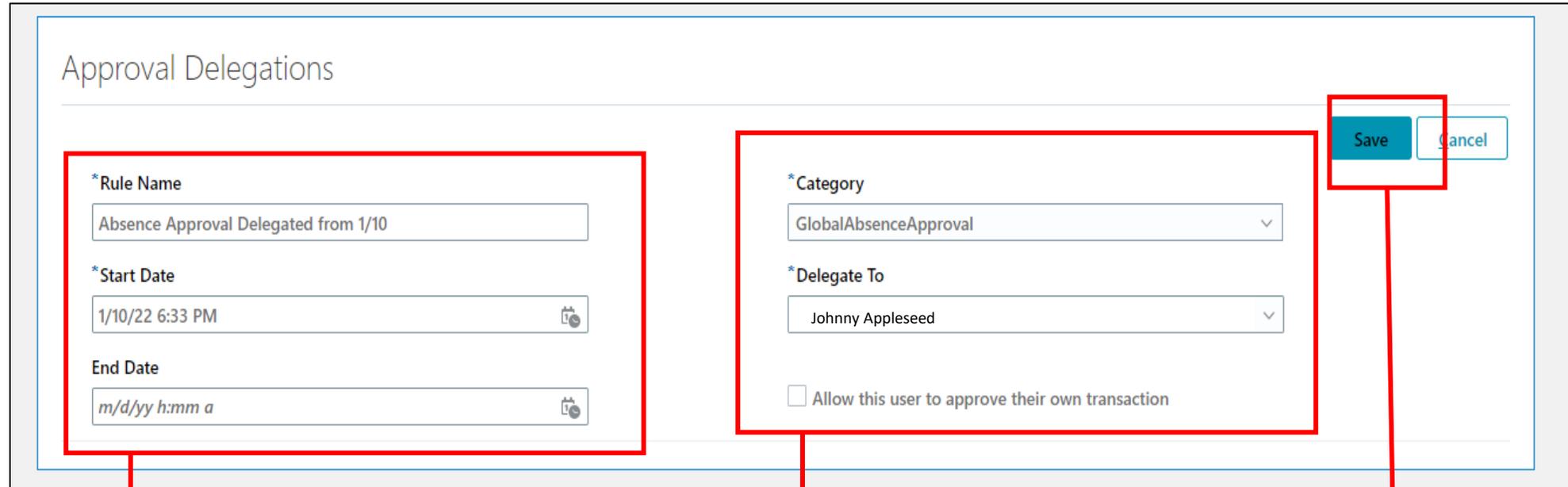
Approval Delegations

[+ Add](#) [^](#)

3

Select the **+Add** button from the Approval Delegations section

Create a Delegation for Absence Approvals



The screenshot shows the 'Approval Delegations' form. It contains several input fields and buttons. A red box highlights the 'Rule Name' field with the text 'Absence Approval Delegated from 1/10', the 'Start Date' field with '1/10/22 6:33 PM', and the 'End Date' field with a placeholder 'm/d/yy h:mm a'. Another red box highlights the 'Category' dropdown menu with 'GlobalAbsenceApproval', the 'Delegate To' dropdown menu with 'Johnny Appleseed', and a checkbox labeled 'Allow this user to approve their own transaction'. A third red box highlights the 'Save' and 'Cancel' buttons at the top right of the form.

4

Key in a **Rule Name**, and select a **Start Date** and an **End Date** for the Approval Delegation

5

Select a **Category** for the rule, and an Employee to **Delegate To** from the drop down menus

6

Select the **Save** button

Create a Delegation for Absence Approvals

Person Number
025710

User Name
025710

Account Status
Active

Roles

DC SS Employees JR	From 9/12/05
DC SS Manager JR	From 10/29/21
DC TM Talent Manager JR	From 11/17/21

Role Delegations

[+ Add](#)

 There's nothing here so far.

Approval Delegations

[+ Add](#) 

Absence Approval Delegated from 1/10	1/10/22 6:33 PM To Johnny Appleseed	
--------------------------------------	--	---



To Delete an existing Approval Delegation, select the **Edit** Pencil Icon

Managing Direct and Indirect Reports

Lesson 14: Recommend Learnings (Learning)

Lesson Objective:

Upon the completion of the Recommend Learnings lesson, you will be able to:

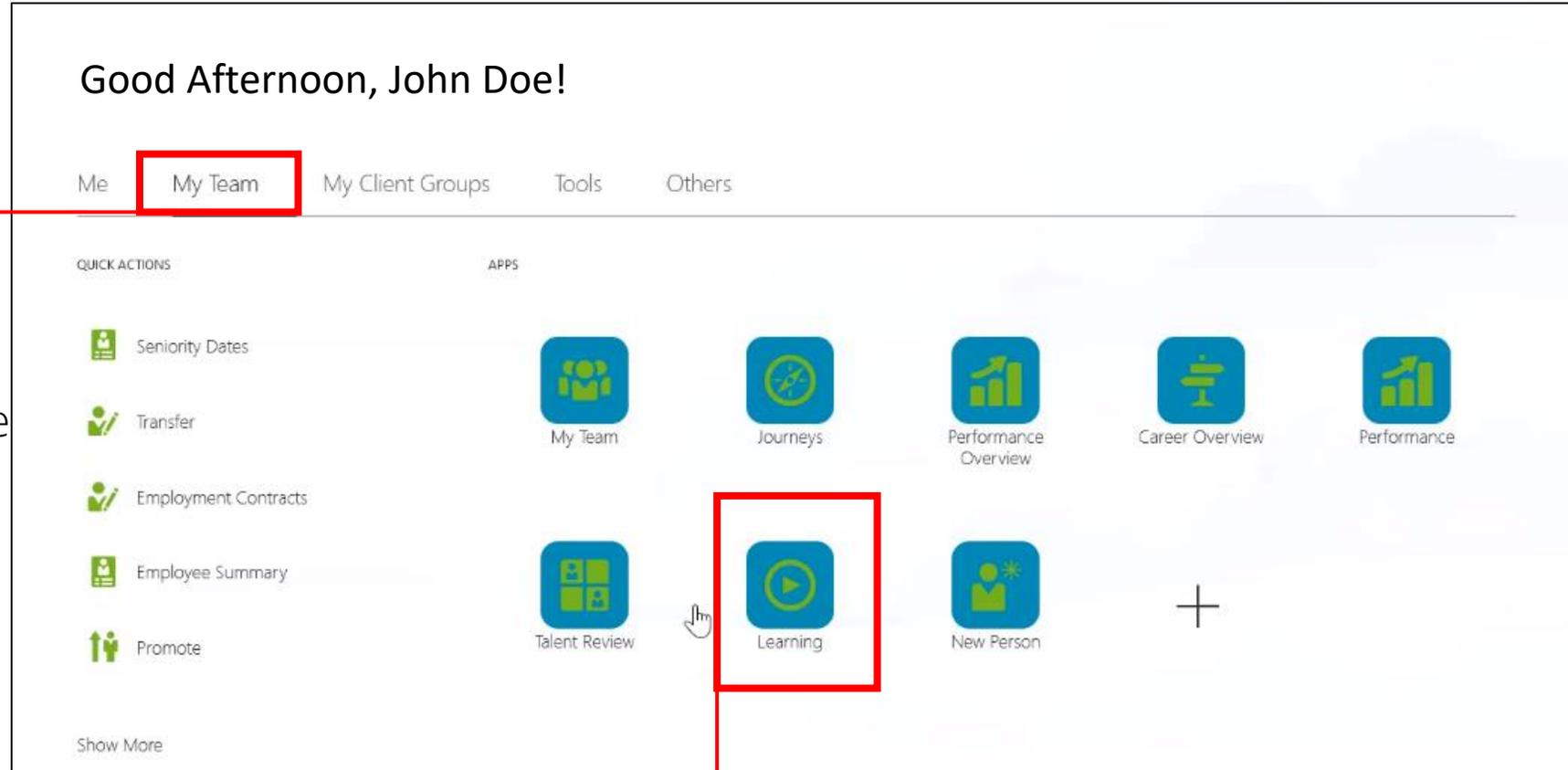
Objective

- Recommend Learning Items to specific Direct and Indirect Reports

Recommend and Assign Learnings

1

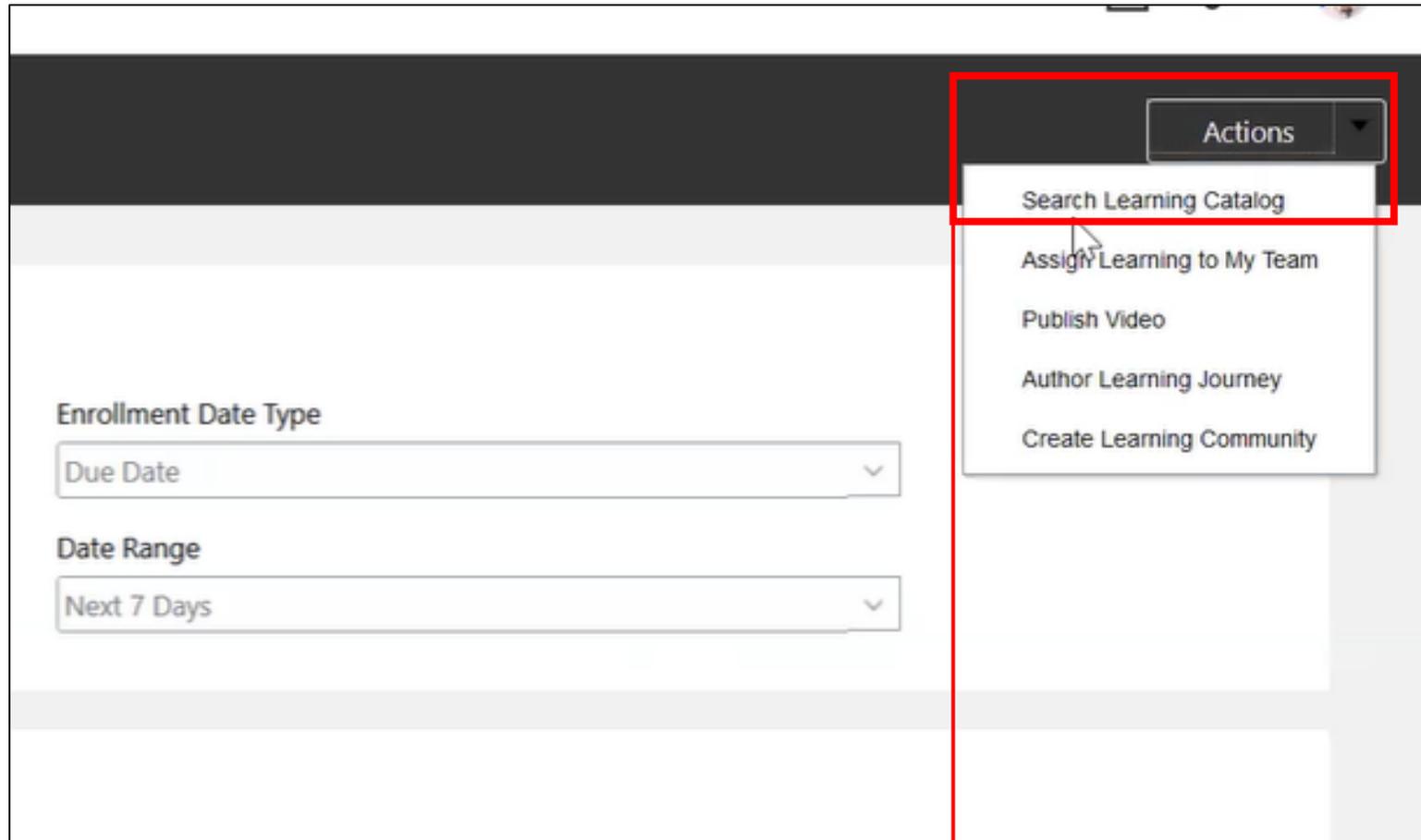
Select the **My Team** tab from the CV360 homepage



2

Select the **Learning** tile from the Apps section

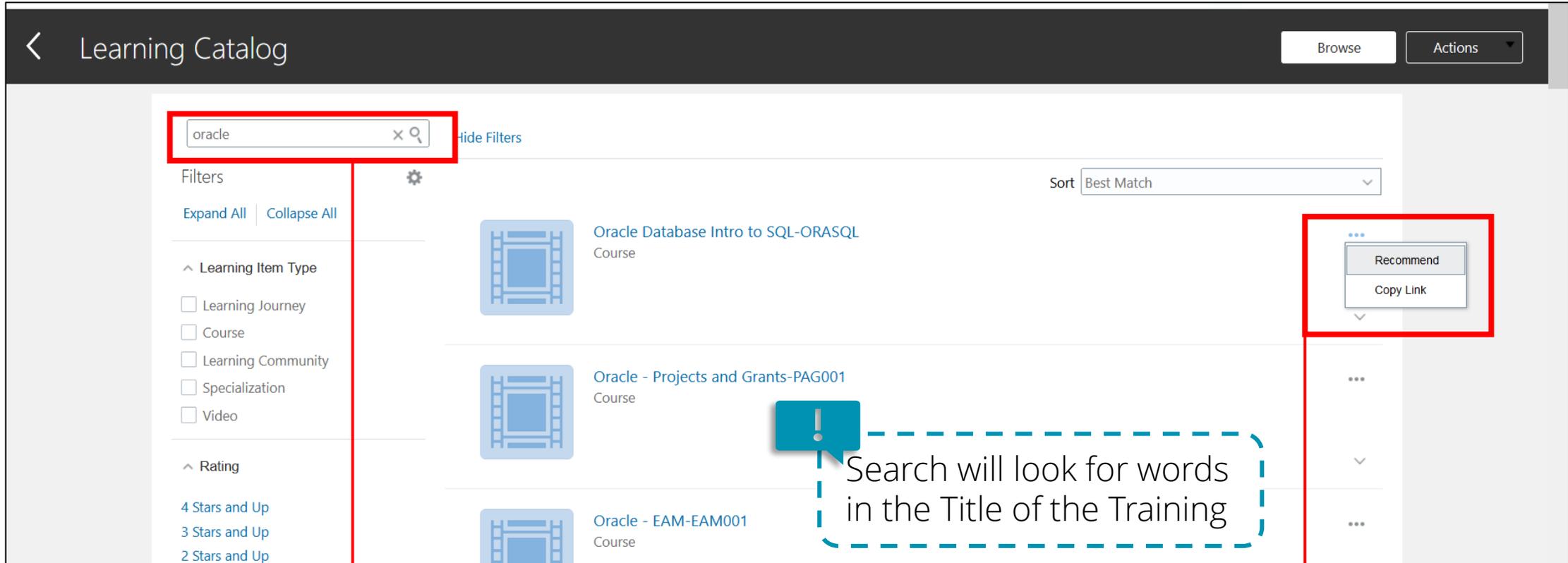
Recommend and Assign Learnings



3

Select **Search Learning Catalog** from the **Actions** drop-down list

Recommend and Assign Learnings



The screenshot shows the 'Learning Catalog' interface. At the top left, there is a back arrow and the text 'Learning Catalog'. On the top right, there are 'Browse' and 'Actions' buttons. A search bar at the top left contains the text 'oracle' and is highlighted with a red box. Below the search bar, there are filter options for 'Learning Item Type' (Learning Journey, Course, Learning Community, Specialization, Video) and 'Rating' (4 Stars and Up, 3 Stars and Up, 2 Stars and Up). A 'Sort' dropdown menu is set to 'Best Match'. The main content area displays three search results, each with a filmstrip icon and a title: 'Oracle Database Intro to SQL-ORASQL Course', 'Oracle - Projects and Grants-PAG001 Course', and 'Oracle - EAM-EAM001 Course'. A red box highlights the 'Recommend' and 'Copy Link' options in the ellipsis menu for the first result. A dashed blue box with an exclamation mark icon contains the text 'Search will look for words in the Title of the Training'.

4

Key in the appropriate keyword ("Oracle" is used in this example) in the search box

5

Select **Recommend** from the ellipses drop-down list

Recommend and Assign Learnings

Recommend Learning
Oracle Database Intro to SQL-ORASQL

Submit Cancel

Recommendation Details

Comments

*Recommend for People

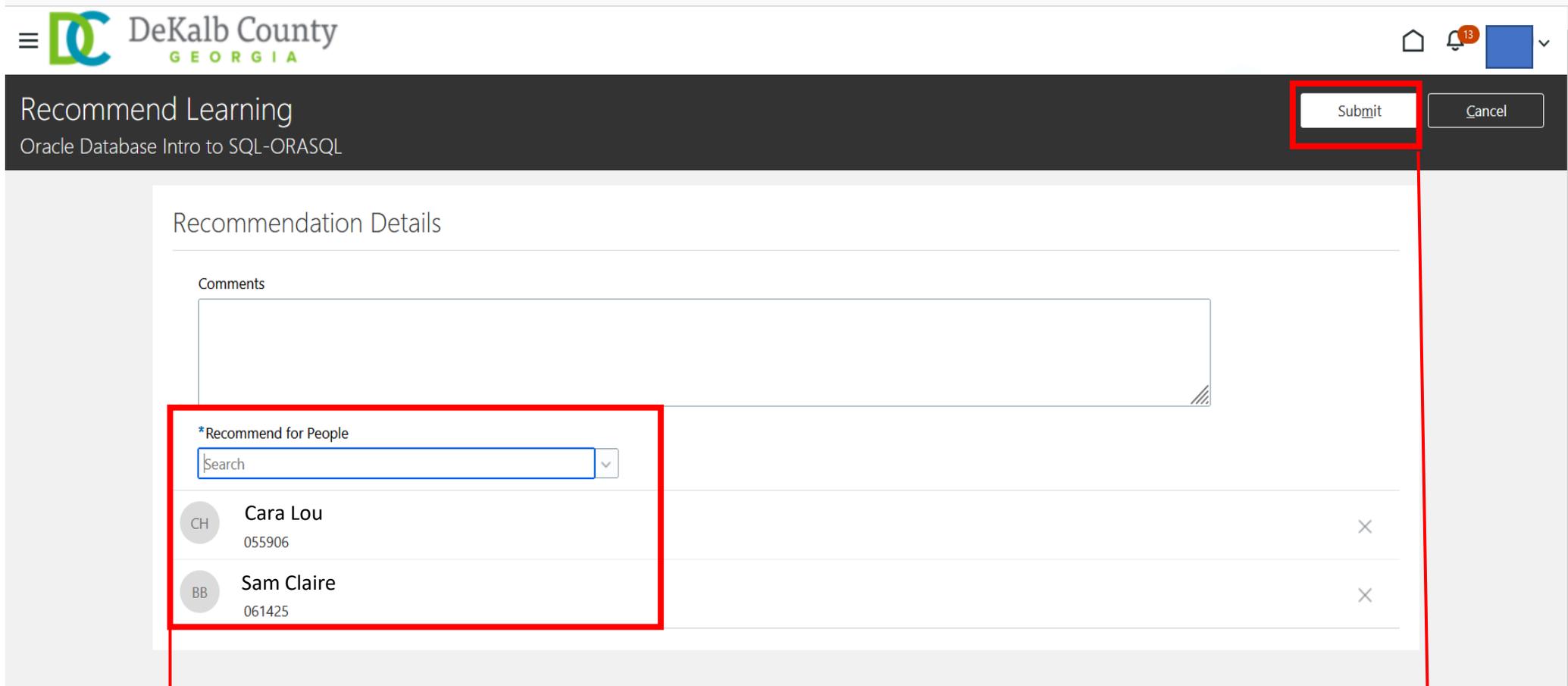
jami

Name	Business Title	Work Email	Person Number
Frank Smith	9004 - Polling Place Clerk *		061425
Cara Lou	9004 - Polling Place Clerk *		055882
Sam Claire	49145 - Firefighter (28-day)		057643
Ben Butler	46050 - Police Officer, Master		050293
Tom Hendrick	9012 - Election Worker *		063229

6 Key in the appropriate **Comments** in the **Comments** field

7 Key in the appropriate **Employee(s) name** in the **Recommend for People** field and select the Employee from the search results list to assign the Course

Recommend and Assign Learnings



9

Select multiple Learners you want to Recommend a Course Offering

Select the Submit button

8

Managing Direct and Indirect Reports

Lesson 15: Assign Learnings (Learning)

Lesson Objective:

Upon the completion of the Assign Learnings lesson, you will be able to:

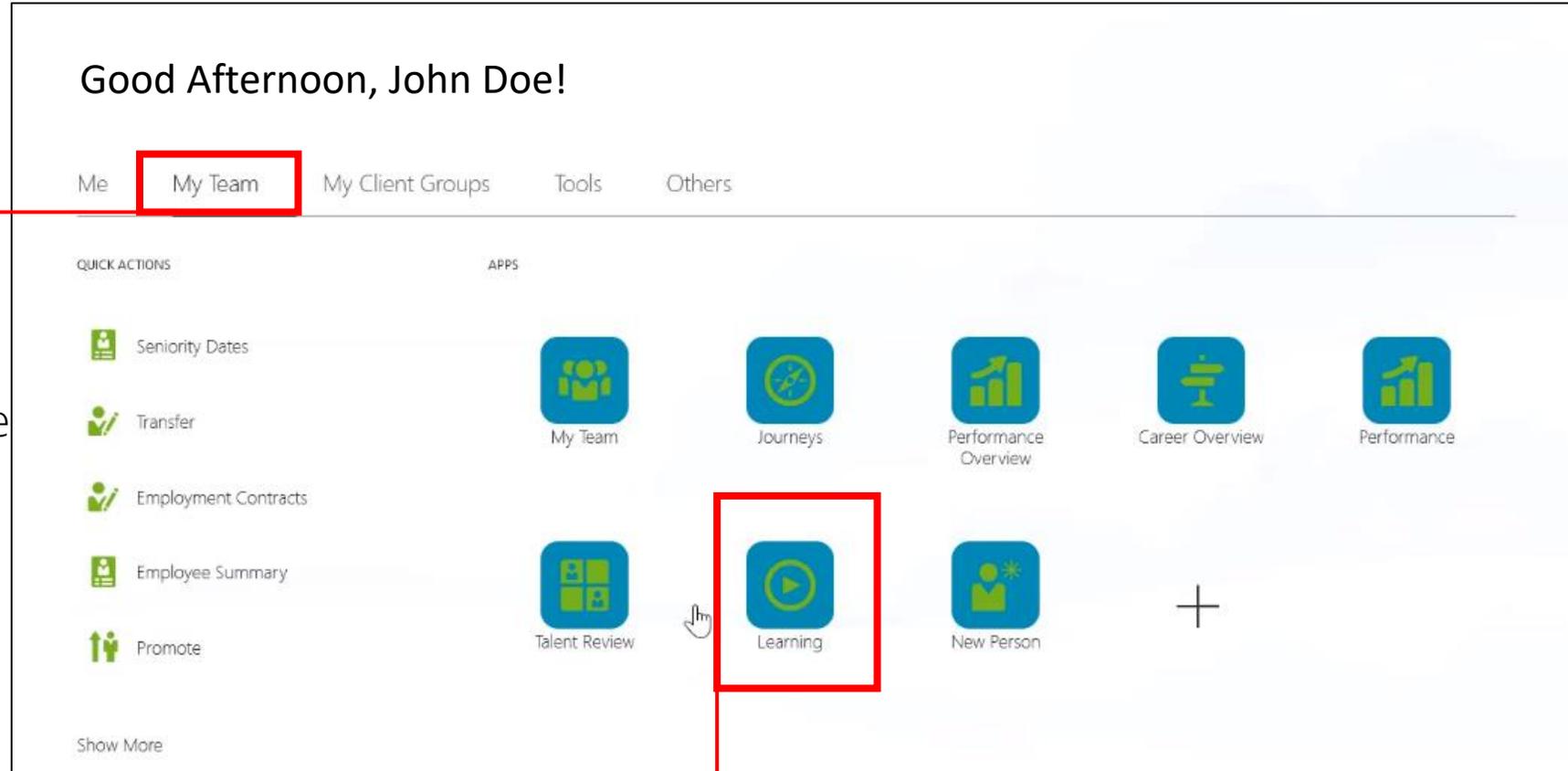
Objective

- Assign Learning to Direct and Indirect Reports

Recommend and Assign Learnings

1

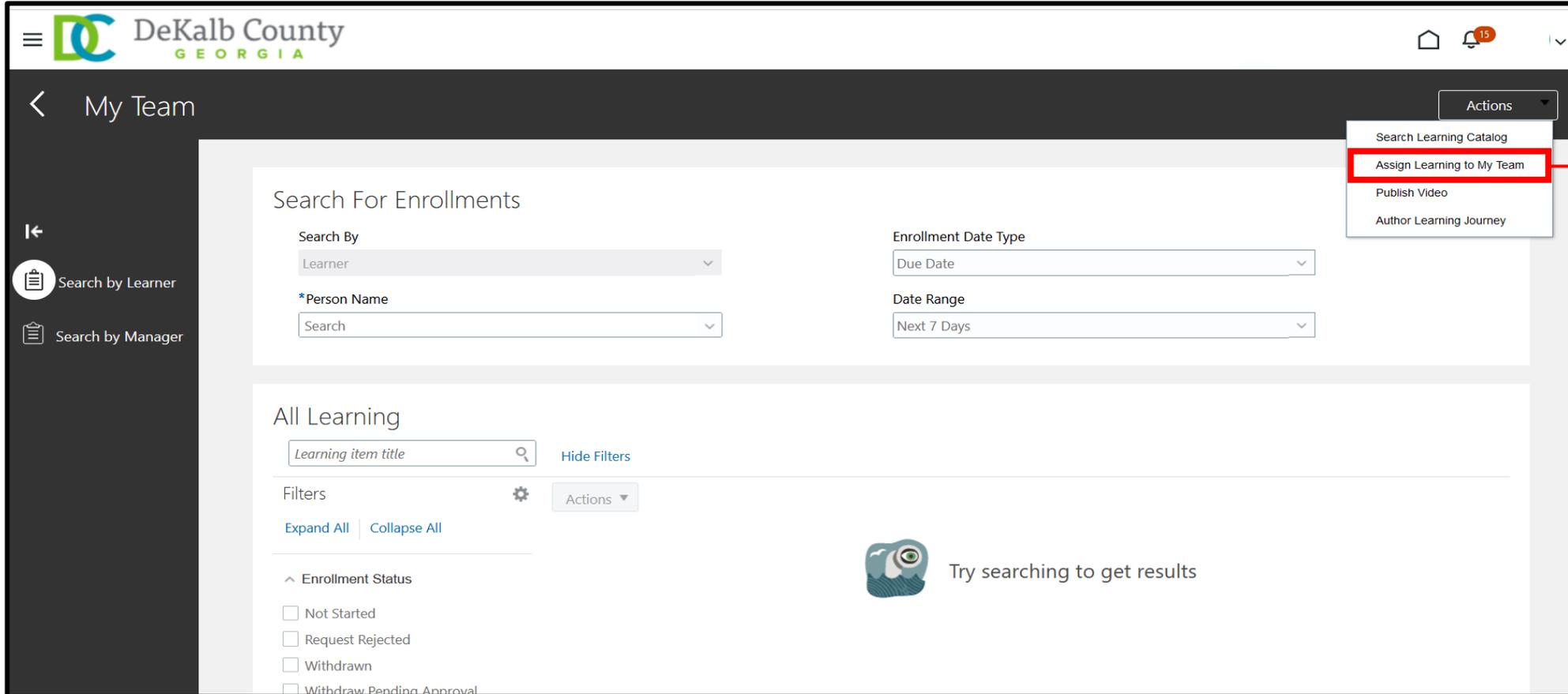
Select the **My Team** tab from the CV360 homepage



2

Select the **Learning** tile from the Apps section

Assign Learnings



The screenshot shows the DeKalb County Georgia LMS interface. At the top left is the DeKalb County Georgia logo. The main header area includes a home icon, a notification bell with '15', and a user profile icon. Below the header, the page title is 'My Team'. On the left sidebar, there are search options: 'Search by Learner' and 'Search by Manager'. The main content area is titled 'Search For Enrollments' and contains several filters: 'Search By' (set to 'Learner'), '*Person Name' (with a search input), 'Enrollment Date Type' (set to 'Due Date'), and 'Date Range' (set to 'Next 7 Days'). Below this is the 'All Learning' section with a search bar for 'Learning item title' and a 'Hide Filters' button. Underneath are filter options for 'Enrollment Status' with checkboxes for 'Not Started', 'Request Rejected', 'Withdrawn', and 'Withdraw Pending Approval'. An 'Actions' dropdown menu is open, showing options: 'Search Learning Catalog', 'Assign Learning to My Team' (highlighted with a red box), 'Publish Video', and 'Author Learning Journey'. A blue circle with the number '3' is positioned to the right of the menu, with a red line pointing to the 'Assign Learning to My Team' option.

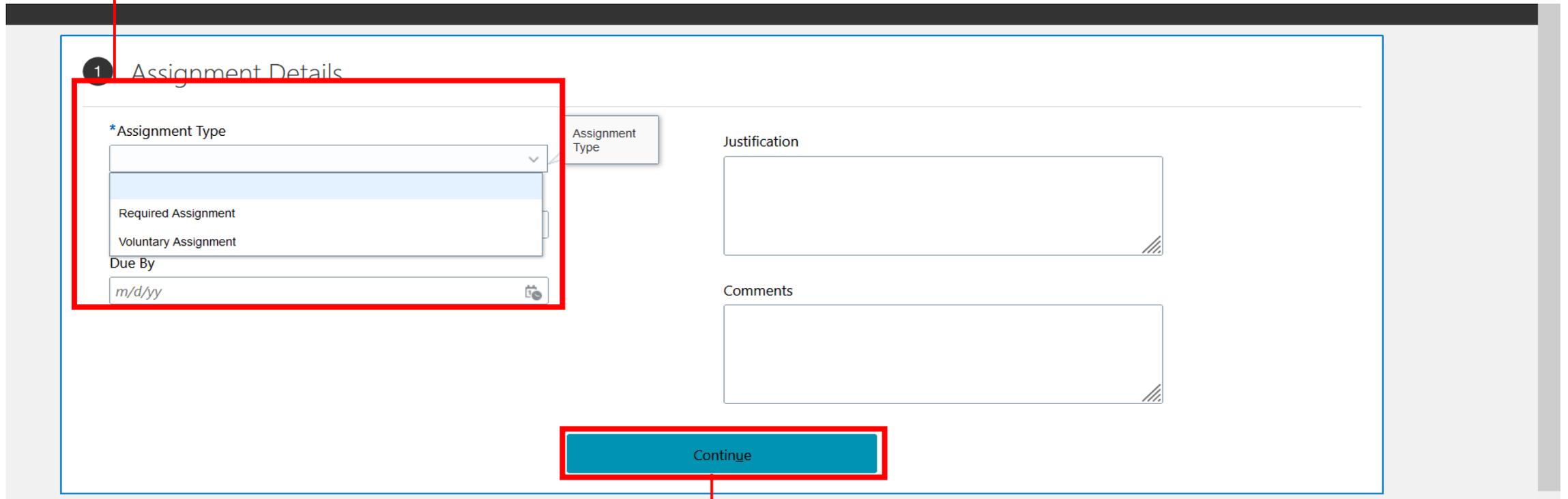
3
Select **Assign Learning to My Team** from the **Actions** drop-down list

! This begins the process of assigning Learning to Direct Reports

Recommend and Assign Learnings

4

Key in the appropriate **Assignment Type** and other relevant information



The screenshot shows a web form titled "Assignment Details" with a blue border. A red box highlights the "Assignment Type" dropdown menu, which is open to show "Required Assignment" and "Voluntary Assignment" options. A tooltip labeled "Assignment Type" points to the dropdown. Below the dropdown is a "Due By" field with a calendar icon and the placeholder "m/d/yy". To the right are "Justification" and "Comments" text areas. At the bottom center, a blue "Continue" button is highlighted with a red box. A small "1" in a circle is positioned above the "Assignment Details" title.

5

Select the **Continue** button

Recommend and Assign Learnings

Assign Learning to My Team

Submit

Cancel

① Assignment Details

Edit

② Select Learning Item

management



Hide Filters

Filters



Expand All Collapse All

Learning Item Type

Course

Video

Learning Journey

Specialization

Rating

4 Stars and Up

3 Stars and Up

2 Stars and Up

1 Star and Up

Sort Best Match



Performance Management Writing-LDR007
Course



Certificate - Finance Risk Management
Course



Jami-Management Training
Specialization

13

Key in the appropriate keyword (“Management” is used in this example) in the search field.

Recommend and Assign Learnings

Assign Learning to My Team Submit Cancel

2 Select Learning Item

management x

Filters Sort: Best Match

Learning Item Type

- Course
- Video
- Learning Journey
- Specialization

Rating

- 4 Stars and Up
- 3 Stars and Up
- 2 Stars and Up
- 1 Star and Up

<input type="radio"/>		Performance Management Writing-LDR007 Course
<input type="radio"/>		Certificate - Finance Risk Management Course
<input checked="" type="radio"/>		Jami-Management Training Specialization

14

Select the **radio button** next to the course to select it, then select the **Continue** button.

Recommend and Assign Learnings

Assign Learning to My Team Submit Cancel

1 Assignment Details Edit

2 Select Learning Item Edit

3 Select Learners

Search... Show Filters Display Direct reports ×

Add Learners Sort Name A to Z

<input checked="" type="checkbox"/>	DE DeiEmp ElsberryDC	hcmproject@dekalbcountyga.gov
<input checked="" type="checkbox"/>	DE DSTest ElsberryDC	hcmproject@dekalbcountyga.gov

Continue

15 Listed will be your team of direct reports. You can select them individually or use the **Select All** checkbox. In this example, the Select All checkbox was used.

16 Select the **Add Learners** Button

Recommend and Assign Learnings

Assign Learning to My Team Submit Cancel

1 Assignment Details Edit

2 Select Learning Item Edit

3 Select Learners

Search... Show Filters Display Direct reports ×

Add Learners Sort Name A to Z

<input type="checkbox"/>	DE	DeiEmp ElsberryDC Added	hcmproject@dekalbcountyga.gov
<input type="checkbox"/>	DE	DSTest ElsberryDC Added	hcmproject@dekalbcountyga.gov

Continue

17

The names will have an Added label and the Continue button should now be Active.

Select the **Continue** button.

Recommend and Assign Learnings

Assign Learning to My Team

Submit Cancel

① Assignment Details [Edit](#)

② Select Learning Item [Edit](#)

③ Select Learners [Edit](#)

④ Selected Learners

Search...

[Delete](#) Sort Name A to Z

<input type="checkbox"/>	DE	DSTest ElsberryDC	hcmproject@dekalbcountyga.gov
<input type="checkbox"/>	DE	DeiEmp ElsberryDC	hcmproject@dekalbcountyga.gov

18

Confirm that the selected list of learners is correct.

Select the Submit button.

19

Recommend and Assign Learnings

Assign Learning to My Team Done

 The assignment creation process has completed.
Number of users assigned: 2.

Selected Learners Sort

<input checked="" type="checkbox"/>	DE	DSTest ElsberryDC	hcmproject@dekalbcountyga.gov
<input checked="" type="checkbox"/>	DE	DeiEmp ElsberryDC	hcmproject@dekalbcountyga.gov

A confirmation page will appear indicating the assignment creation process has been completed.

Select the **Done** button.

Recommend and Assign Learnings: Knowledge Check

Managers can assign learnings to both Direct and Indirect Reports

True or False?

A. True

B. False



Recommend and Assign Learnings: Knowledge Check

Managers can assign learnings to both Direct and Indirect Reports

True or False?

A. *True*

B. *False*



The correct answer is A. Managers can assign learnings to Direct Reports and Indirect Reports

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercises:

Assignment:

- Recommend a Lesson to an Indirect Report
- Assign a Lesson to a Direct Report

Managing Direct and Indirect Reports

Lesson 16: Request Non-Catalog Learning Item (Learning)

Lesson Objective:

Upon the completion of the Request Non-Catalog Learning Item Lesson, you will be able to:

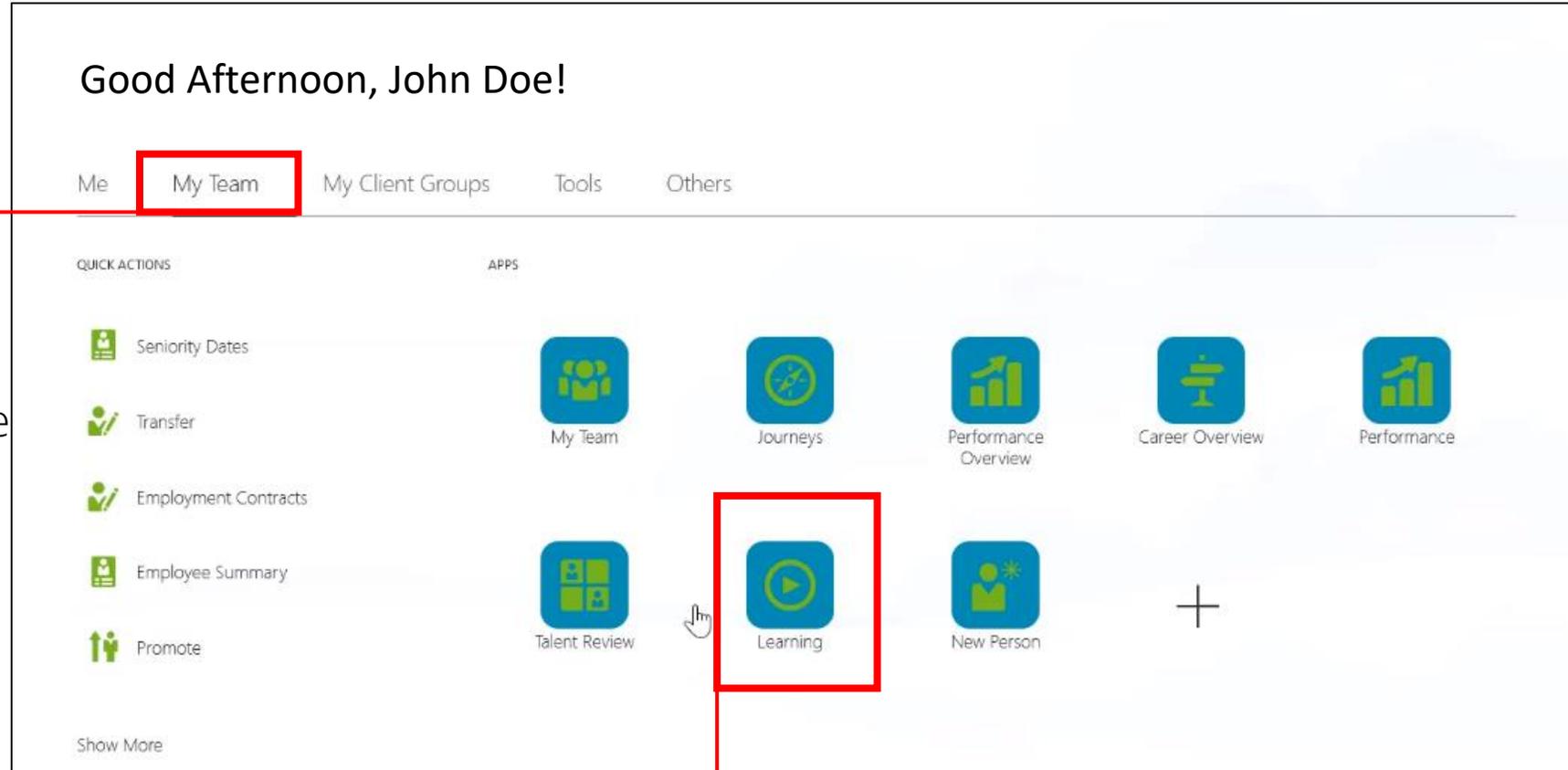
Objective

- Request Learning items that are not already logged in the Learning Catalog

Request Non-Catalog Learning Item

1

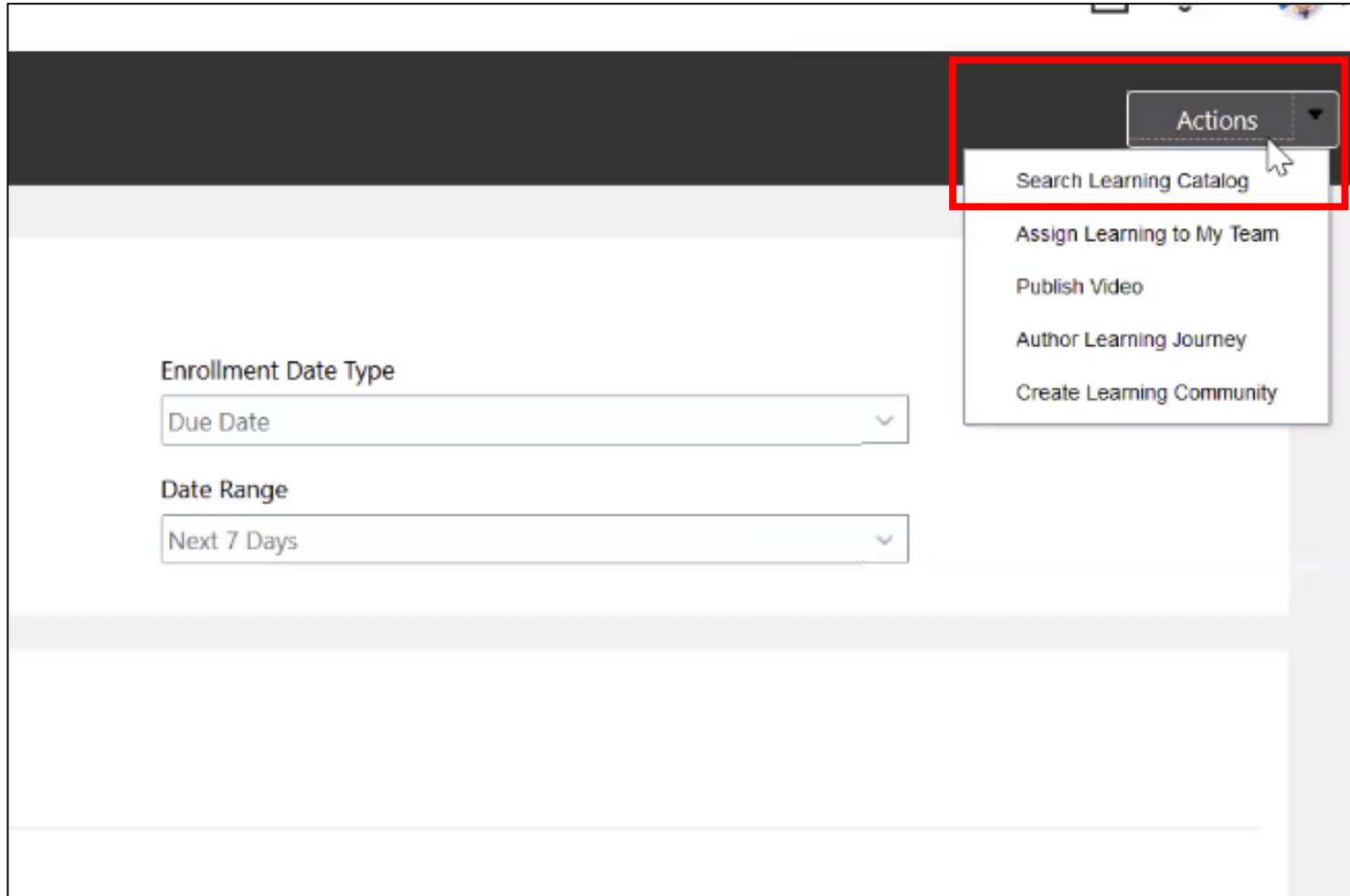
Select the **My Team** tab from the CV360 homepage



2

Select the **Learning** tile from the Apps section

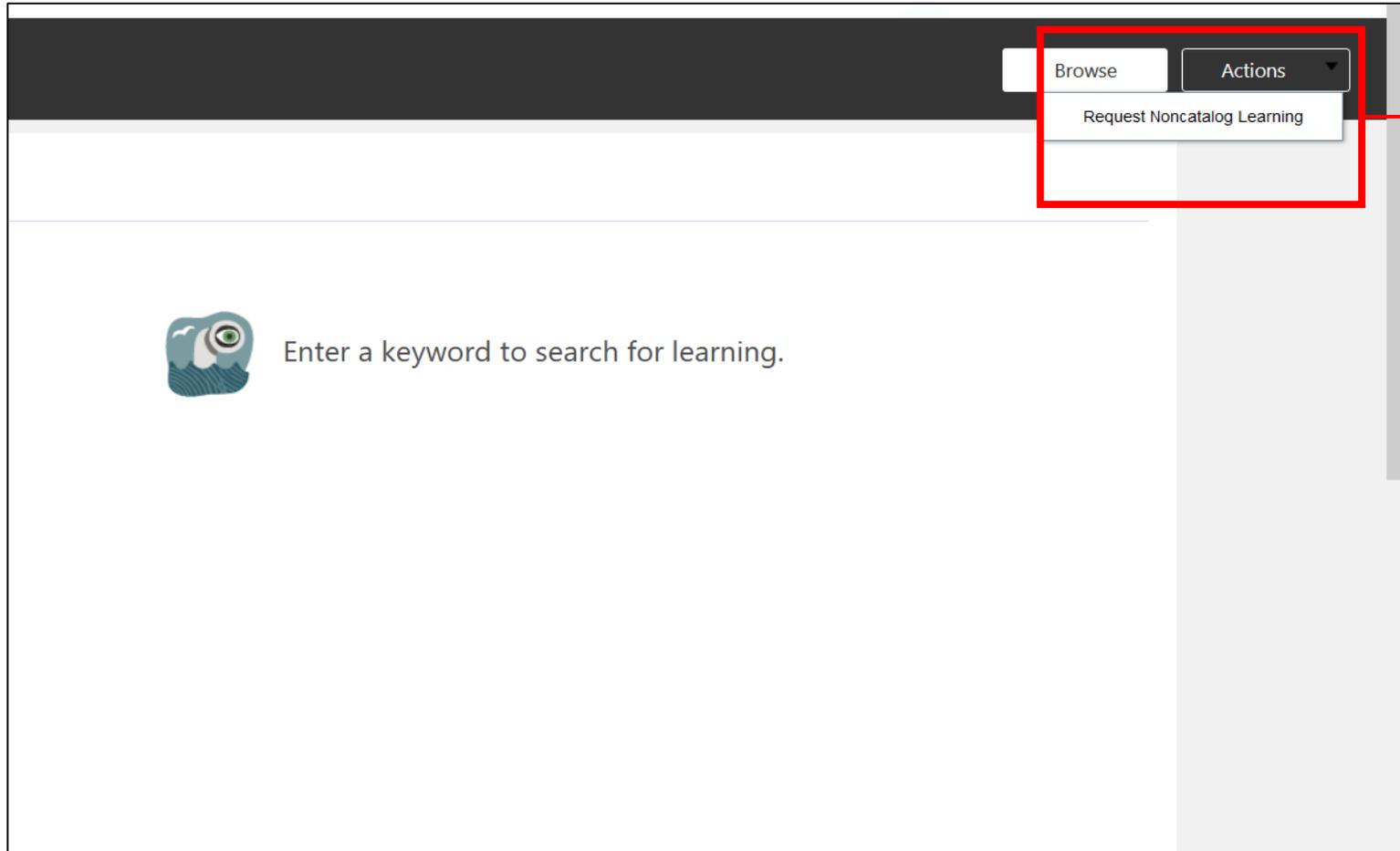
Request Non-Catalog Learning Item



3

Select **Search Learning Catalog** from the **Actions** drop-down list

Request Non-Catalog Learning Item



Select **Request Noncatalog Learning** from the **Actions** drop-down list

Request Non Catalog Learning Item

Learning Item Details

URL

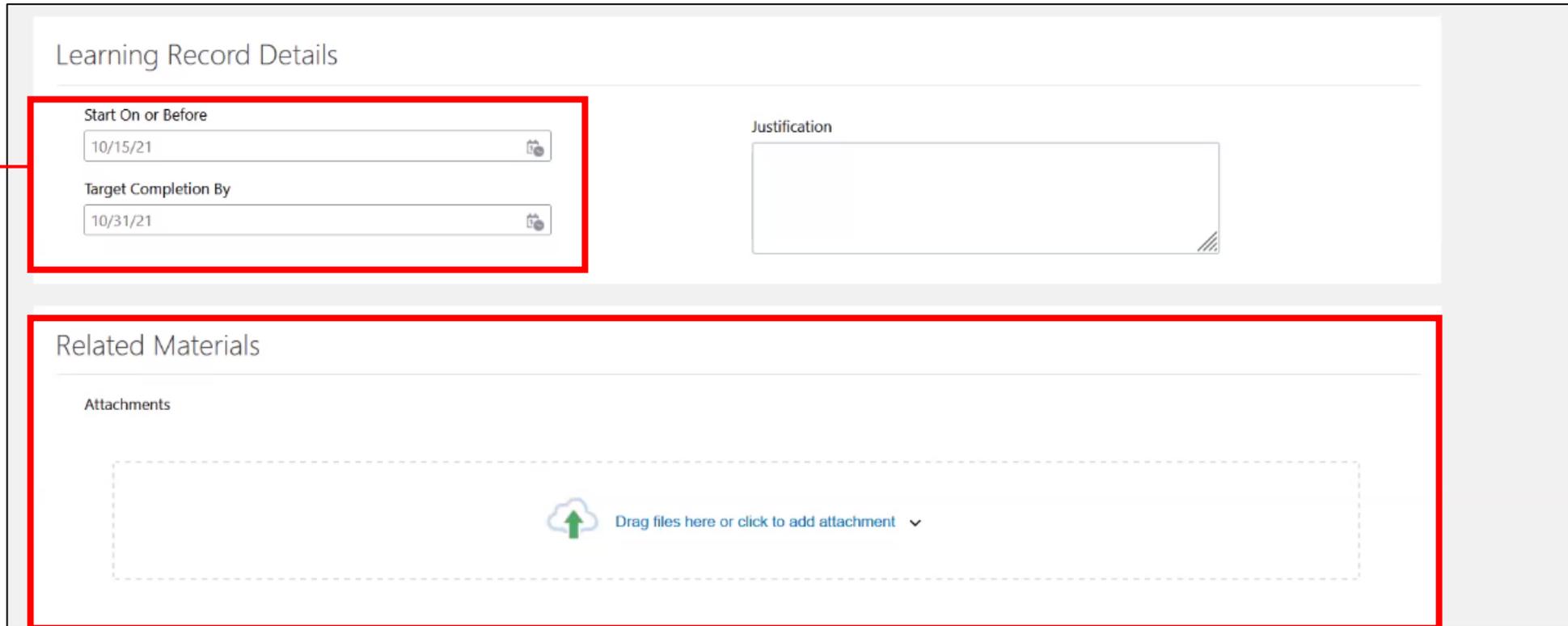
*Title

Description

5

Key in the appropriate information in the **Title** field and any other relevant information

Request Non Catalog Learning Item



The screenshot shows a form titled "Learning Record Details". It contains several input fields: "Start On or Before" with the value "10/15/21", "Target Completion By" with the value "10/31/21", and a "Justification" text area. Below these is a section titled "Related Materials" which includes an "Attachments" area with a dashed border and a green upload icon. A red box highlights the date fields, and another red box highlights the "Related Materials" section. A red line connects the date fields to callout 6 and the "Related Materials" section to callout 7.

6

Key in the appropriate information in the Start On or Before and Target Completion By fields

7

Include any relevant attachments in the Related Materials field

Request Non-Catalog Learning Item

Request Learning Submit Cancel

Learning Item Details

URL	<input type="text"/>	Effort in Hours	<input type="text" value="4"/>
*Title	<input type="text" value="Executive Communications"/>	Cost	<input type="text" value="120.00"/>
Description	<input type="text"/>	Currency	<input type="text" value="EUR"/>
		Continuing Professional Education Type	<input type="text" value="Seminars/Workshops"/>
		Continuing Professional Education Units	<input type="text" value="1196.50"/>

Continuing Professional Education Units

Learning Record Details



Select the **Submit** button to submit the Learning Request

Request Non Catalog Learning Item: Knowledge Check

The Title field is not required when requesting a new Learning Item?

True or False ?

A. True

B. False



Request Non Catalog Learning Item: Knowledge Check

The Title field is not required when requesting a new Learning Item.

True or False ?

A. *True*

B. *False*



The correct answer is B. Managers do have to assign a Title when requesting a new Learning Item

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- Request a Learning item that is not currently logged in the Learning Catalog

Managing Direct and Indirect Reports

Lesson 17: View Learning Status (Learning)

Lesson Objective:

Upon the completion of the View Learning Status Lesson, you will be able to:

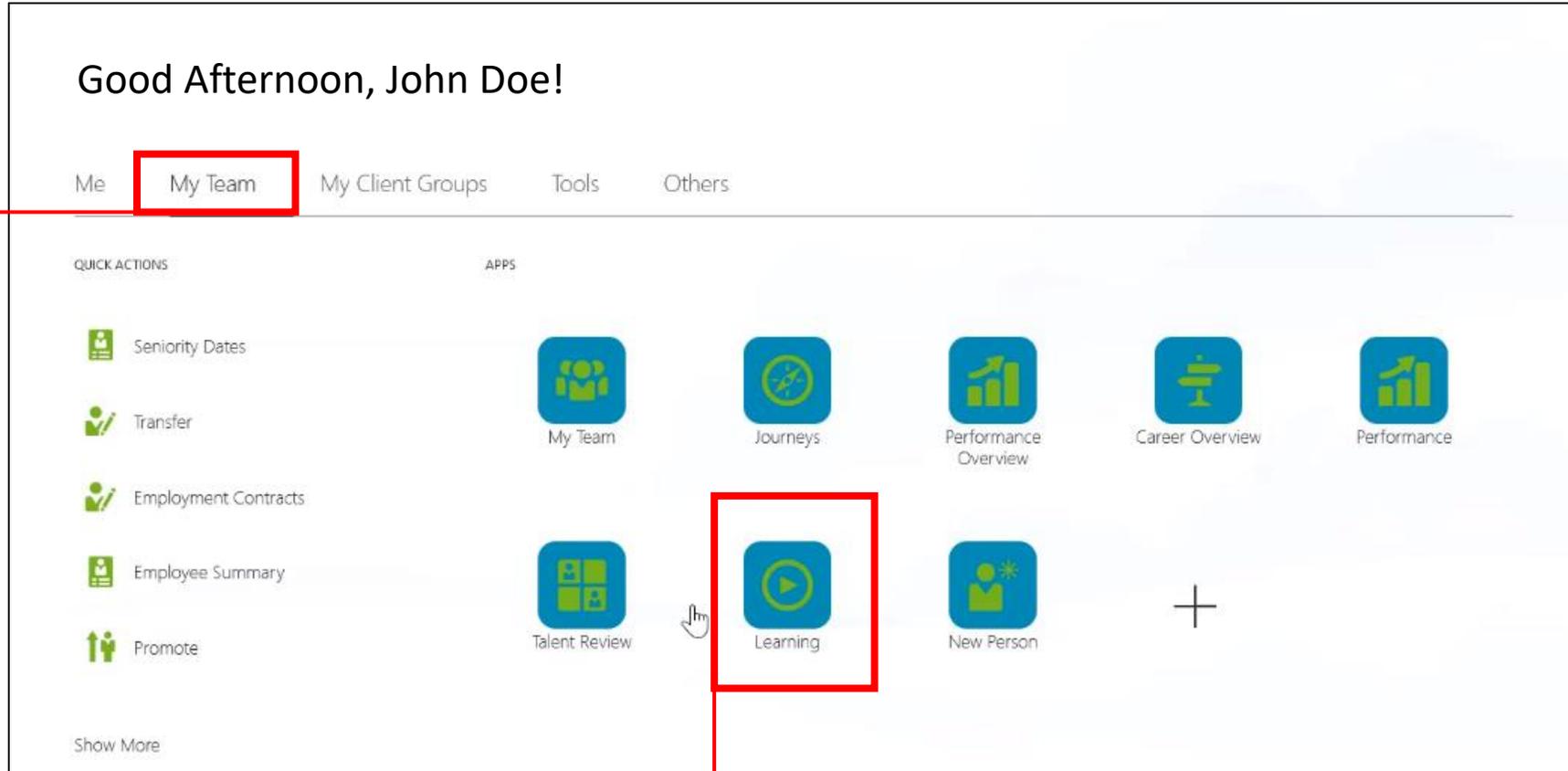
Objective

- View the Learning Status for specific Direct and Indirect Reports

View Learning Status

1

Select the **My Team** tab from the CV360 homepage



Good Afternoon, John Doe!

Me **My Team** My Client Groups Tools Others

QUICK ACTIONS

- Seniority Dates
- Transfer
- Employment Contracts
- Employee Summary
- Promote

SHOW MORE

APPS

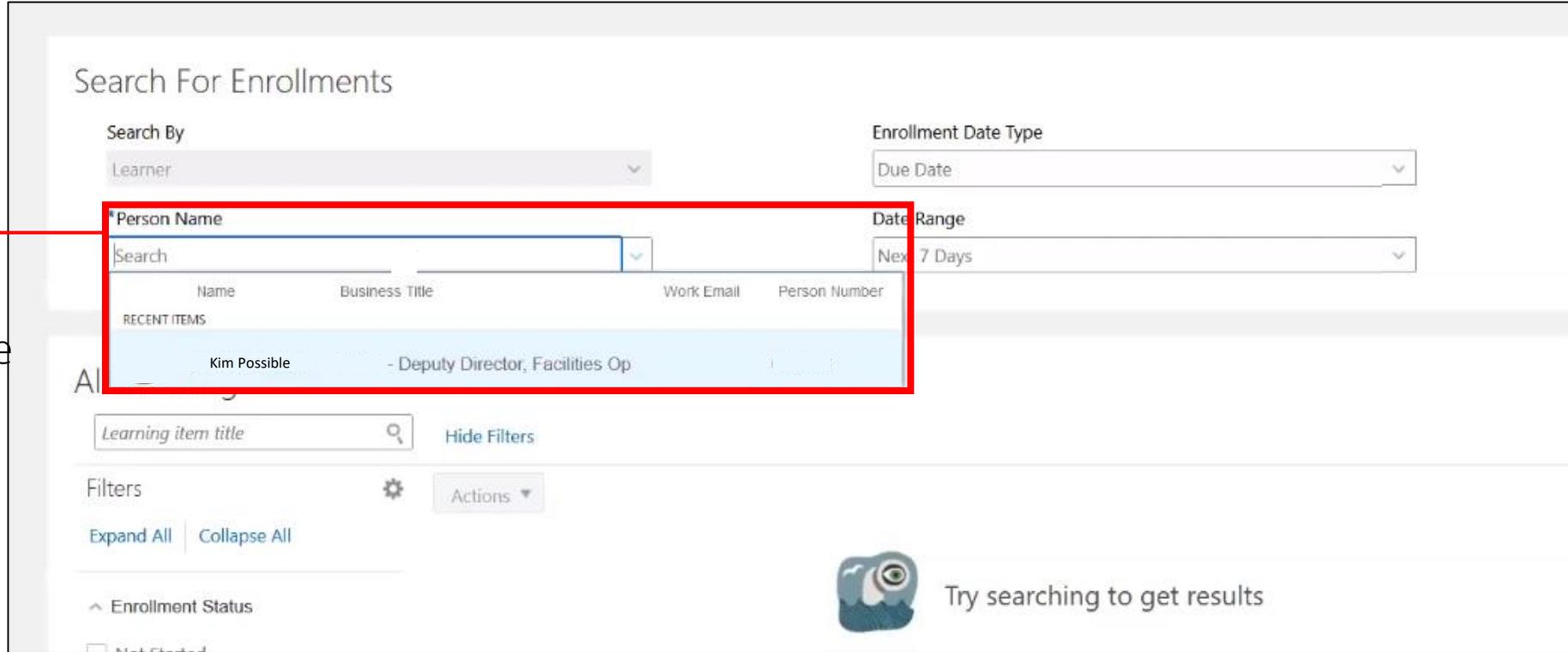
- My Team
- Journeys
- Performance Overview
- Career Overview
- Performance
- Talent Review
- Learning**
- New Person
- +

2

Select the **Learning** tile from the Apps section

View Learning Status

3



Search For Enrollments

Search By: Learner

Enrollment Date Type: Due Date

Person Name: Search

Date Range: Next 7 Days

Name	Business Title	Work Email	Person Number
RECENT ITEMS			
Kim Possible	- Deputy Director, Facilities Op		

Learning item title: [Search]

Hide Filters

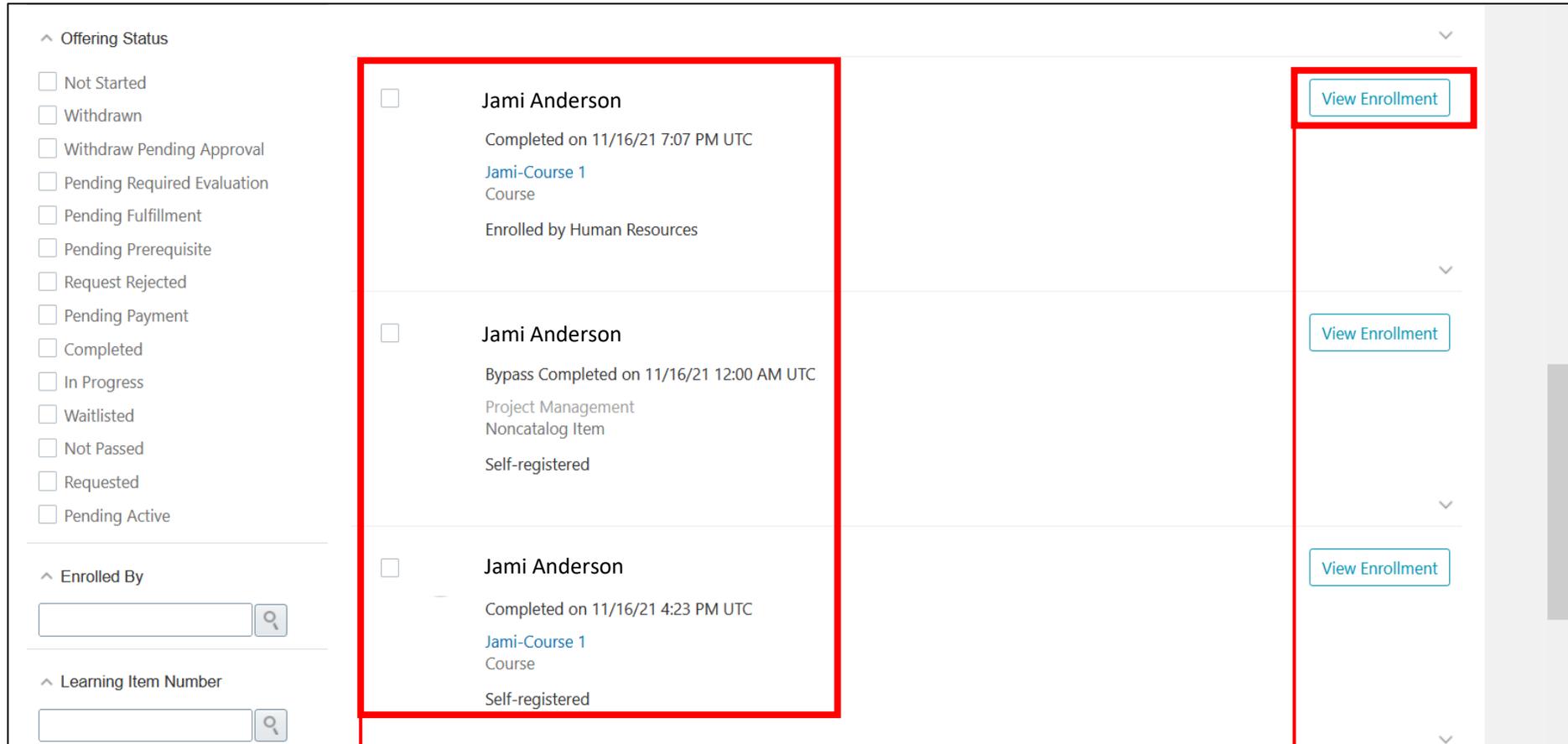
Filters: Expand All | Collapse All

Enrollment Status: [Not Started]

Try searching to get results

Key in the Name of the appropriate Direct Report in the **Person Name** field to find their training history information

View Learning Status



The screenshot displays a web interface for viewing learning status. On the left, there are filter sections for 'Offering Status' (with 15 checkboxes) and 'Enrolled By' (with a search box). Below these are search boxes for 'Learning Item Number'. The main area shows a list of three entries for 'Jami Anderson'. The first entry is highlighted with a red box and includes a 'View Enrollment' button also highlighted with a red box. The second and third entries also have 'View Enrollment' buttons. The interface includes a vertical scrollbar on the right side.

Offering Status	Enrolled By	Learning Item Number
<input type="checkbox"/> Not Started		
<input type="checkbox"/> Withdrawn		
<input type="checkbox"/> Withdraw Pending Approval		
<input type="checkbox"/> Pending Required Evaluation		
<input type="checkbox"/> Pending Fulfillment		
<input type="checkbox"/> Pending Prerequisite		
<input type="checkbox"/> Request Rejected		
<input type="checkbox"/> Pending Payment		
<input type="checkbox"/> Completed		
<input type="checkbox"/> In Progress		
<input type="checkbox"/> Waitlisted		
<input type="checkbox"/> Not Passed		
<input type="checkbox"/> Requested		
<input type="checkbox"/> Pending Active		

Enrolled By	Learning Item Number

Employee	Course	Enrollment Date	Enrollment Type	Action
Jami Anderson	Jami-Course 1 Course	Completed on 11/16/21 7:07 PM UTC	Enrolled by Human Resources	View Enrollment
Jami Anderson	Project Management Noncatalog Item	Bypass Completed on 11/16/21 12:00 AM UTC	Self-registered	View Enrollment
Jami Anderson	Jami-Course 1 Course	Completed on 11/16/21 4:23 PM UTC	Self-registered	View Enrollment

4

Scroll down to view the courses associated with the selected Employee

5

Select the **View Enrollment** link to view additional Enrollment details

View Learning Status

< Jami-Course 1 Actions

 **Information**
Completed on 12/2/21 7:24 PM UTC

Enrolled By
Human Resources

How to Complete


Enroll in an offering to complete this course.
View offerings to see what's available.



View relevant Learning history for the selected Employee

View Learning Status: Knowledge Check

Managers can view an Employee's Learning History through the Performance tile

True or False?

A. True

B. False



View Learning Status: Knowledge Check

Managers can view an Employee's Learning History through the Performance tile

True or False?

A. *True*

B. *False*



The correct answer is B. To view an Employee's Learning History, Manager's must select the Learning tile

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- View Learning Status for a specific Employee

Managing Direct and Indirect Reports

Appendix

Appendix

Below is an appendix of commonly used terms in this training and their corresponding definitions.

Term	Definition
Request Information	Request Information is used to send the notification back to initiator or previous approver when the current approver needs more information on the transaction. The request details tab displays the target users or beneficiary information, and related requests, if any.
Delegate	Role delegation is the assignment of a role from one user, known as the delegator, to another user, known as the proxy. The delegation can be either for a specified period, such as a planned absence, or indefinite. We can delegate roles in the Roles and Approvals Delegated to Others section on the Manage User Account page. We can select Navigator - About Me - My Account. To delegate the task to a user that you can search and select. The delegated user will take actions on the task on your behalf. The privileges of the delegate are based on the delegator's privileges
Reassign	Task assignees can reassign their tasks to other users. For example, if an assignee is going to be out of the office for vacation, the assignee can reassign tasks to another user. When tasks are reassigned, email notifications are sent immediately to reassigned users. To reassign the task to another user, group, or application role. On selecting this option, you can search and select users, groups, or application roles for reassigning.
Route Task	Route Task can be used to look up one or more users for routing. When we specify multiple assignees, we can select whether the list of assignees is for simple (group assignment to all users), sequential, or parallel assignment. If a human task was designed to permit ad hoc routing, the task can be routed in an ad-hoc fashion in the worklist.

Appendix

Below is an appendix of commonly used terms in this training and their corresponding definitions.

Term	Definition
Escalate	Escalations are used when an approver has not responded within a specified time period to a transaction that is pending approval. We can specify the time period (timeout) and you can specify alternate approvers to whom to notify and escalate the approval for further action.
Suspend	We can suspend a request using the suspend task. In the Approval Details page we can search for the request that we want to withdraw. By clicking on the task we can view its details in a new tab. Then, from the Task Actions menu we can withdraw. This will successfully suspend the required request.
Add Comments	We can add comments prior to performing any operation on the task such as approving, rejecting, or reassigning the request. We can add notes for the transaction, for example to track what you're doing to address the issue, or to jot down any service request IDs. Others can see these comments only in the Transaction Console.
Add Attachments	Attachments contain files attached to the overall reconciliation, comments or transactions on the reconciliation. We can add attachments prior to performing any operation on the task such as approving, rejecting, or reassigning the request. An attachment can either be a hyperlink or an actual file. It is recommended that the size of the file attachment that you upload be less than 2 MB. If you want to upload file attachments of size greater than 2 MB, then you must change the ADF configuration and increase the size limit.