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

Lesson 1: View Direct Reports (Core HR)

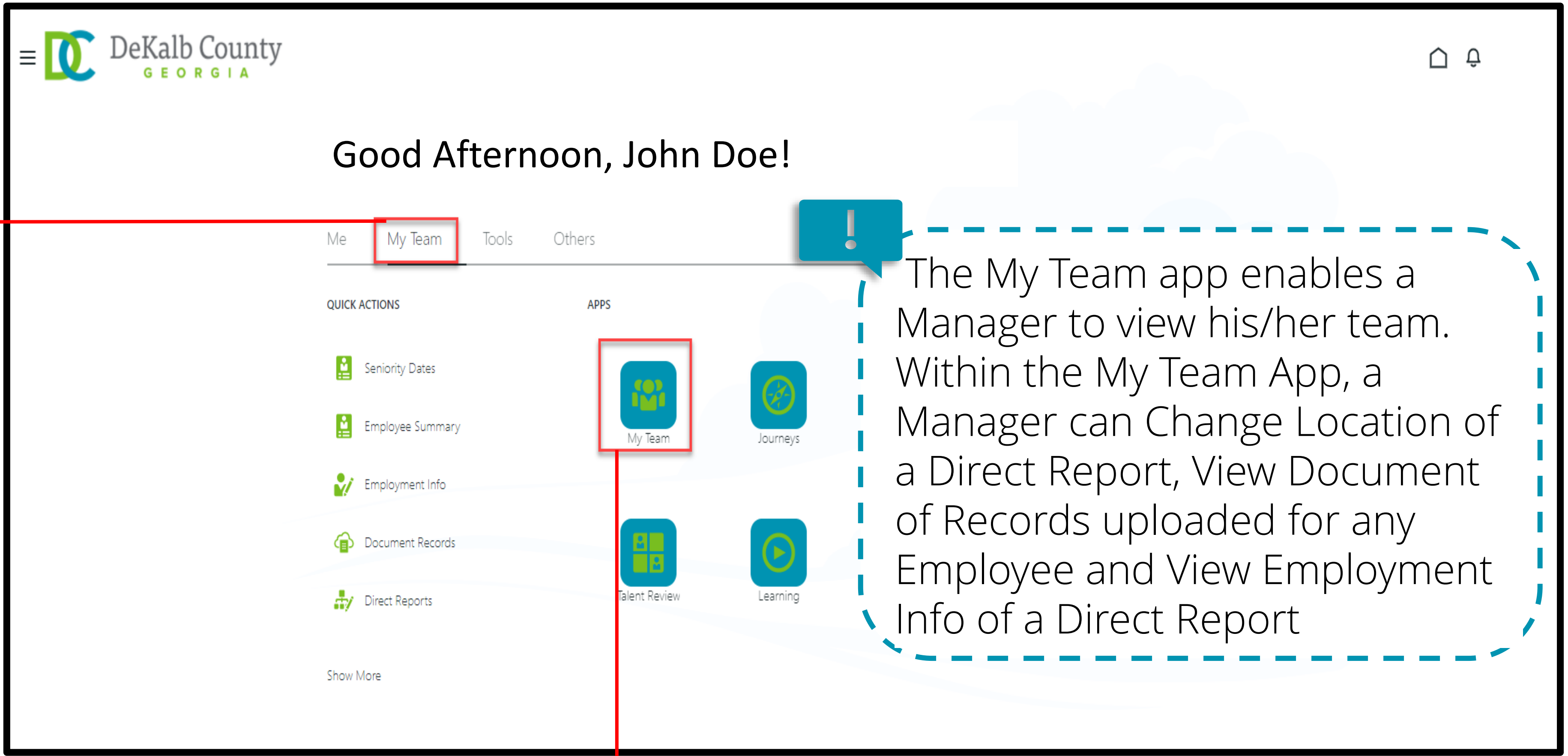
CloudVergent 360

Lesson Objective:

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

Objective
• View Direct Reports

View Direct Reports



!

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

1

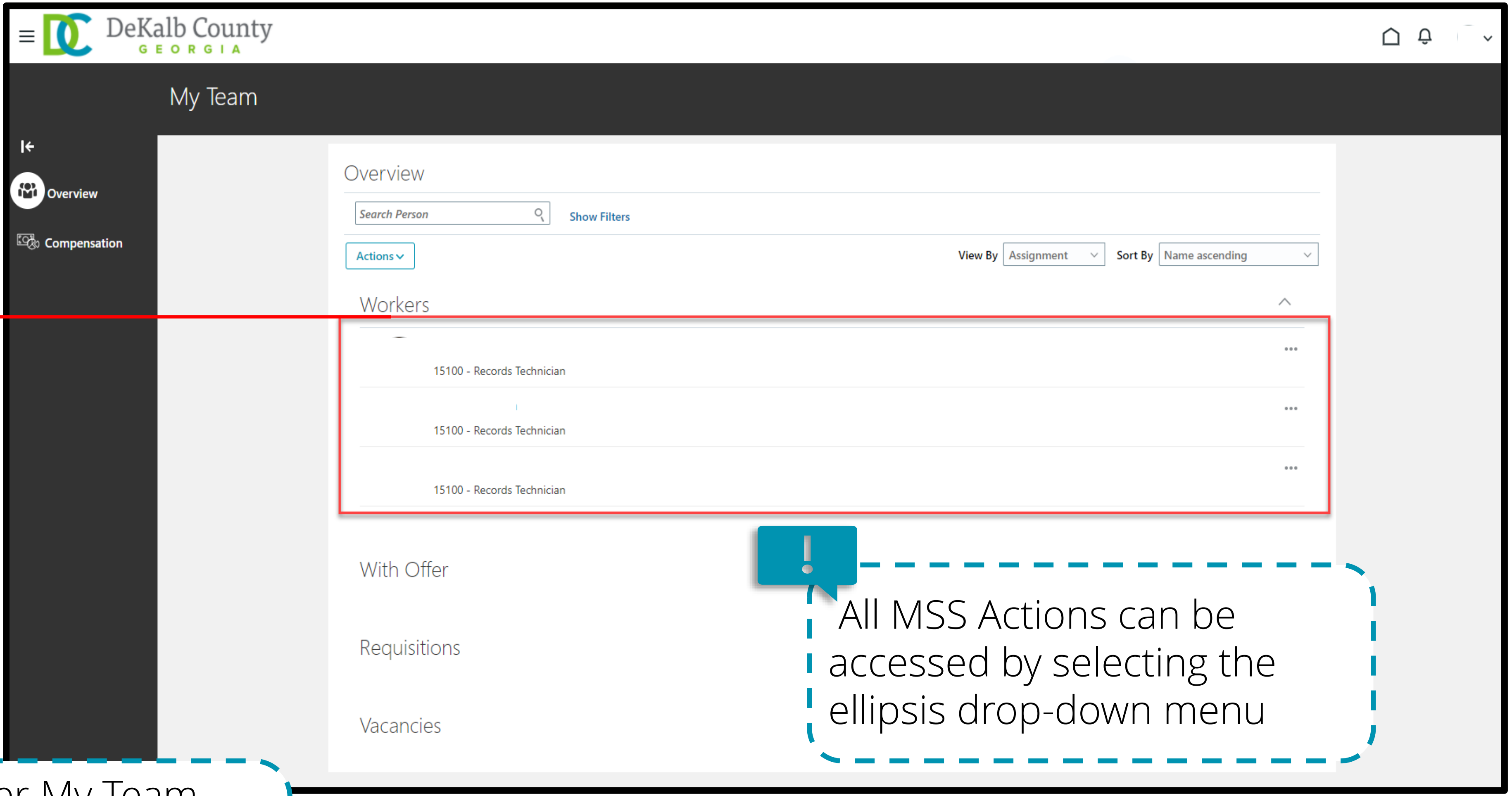
Select the **My Team** tab from the CV360 Homepage

2

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

View Direct Reports

CloudVergent 360



3

View all Direct Reports

!

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

!

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

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

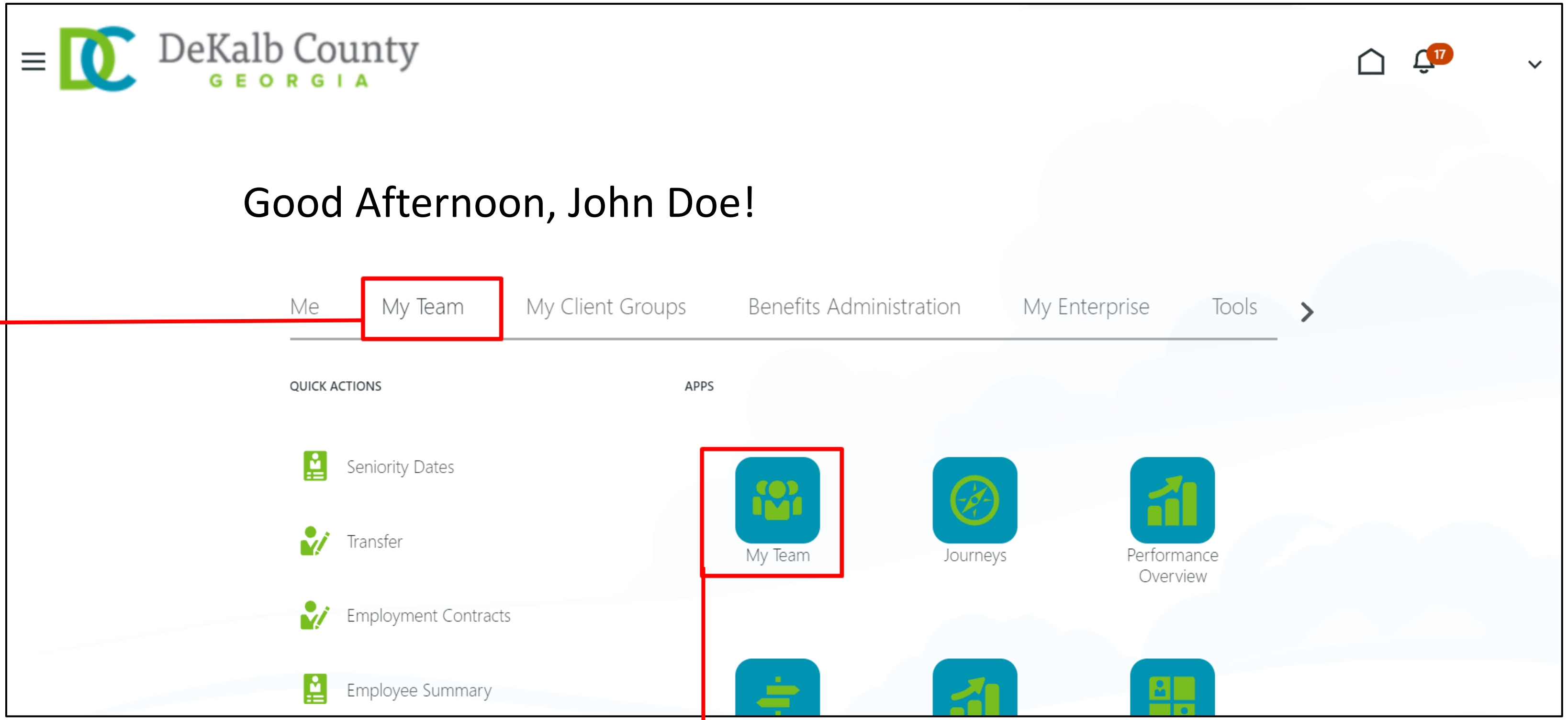
Lesson 2: View Direct and Indirect Report Hierarchy (Core HR)

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



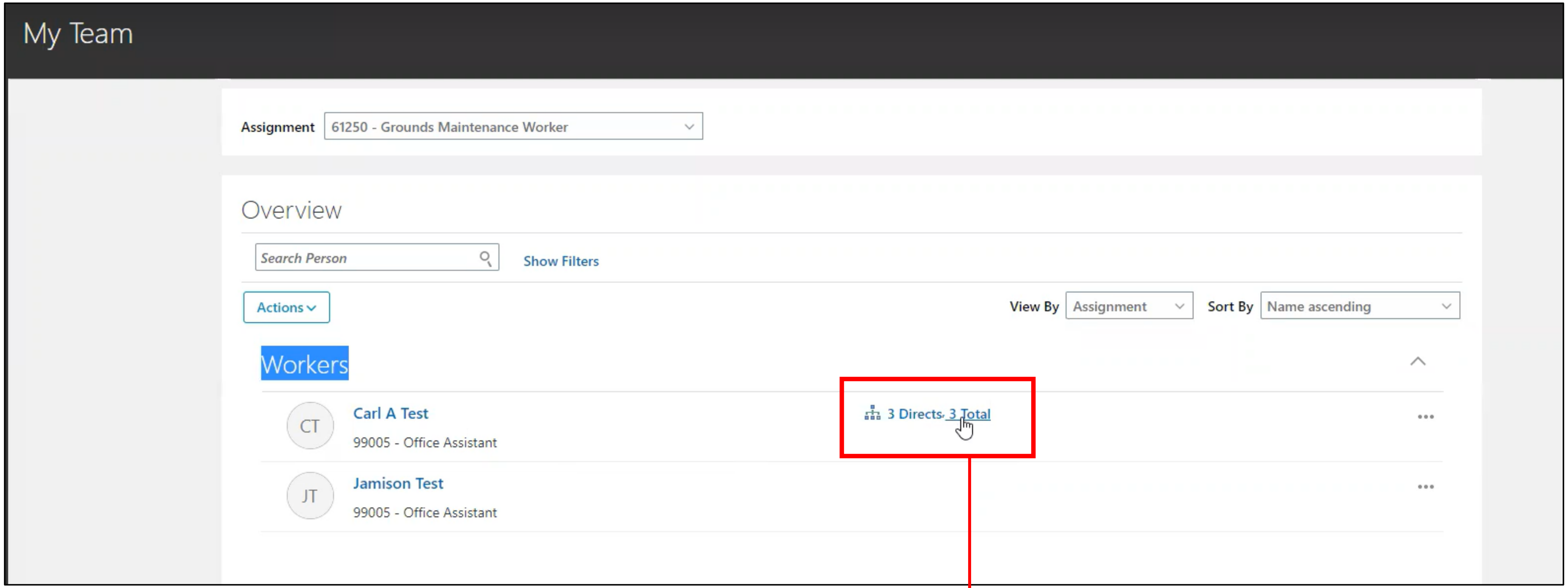
1

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

2

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

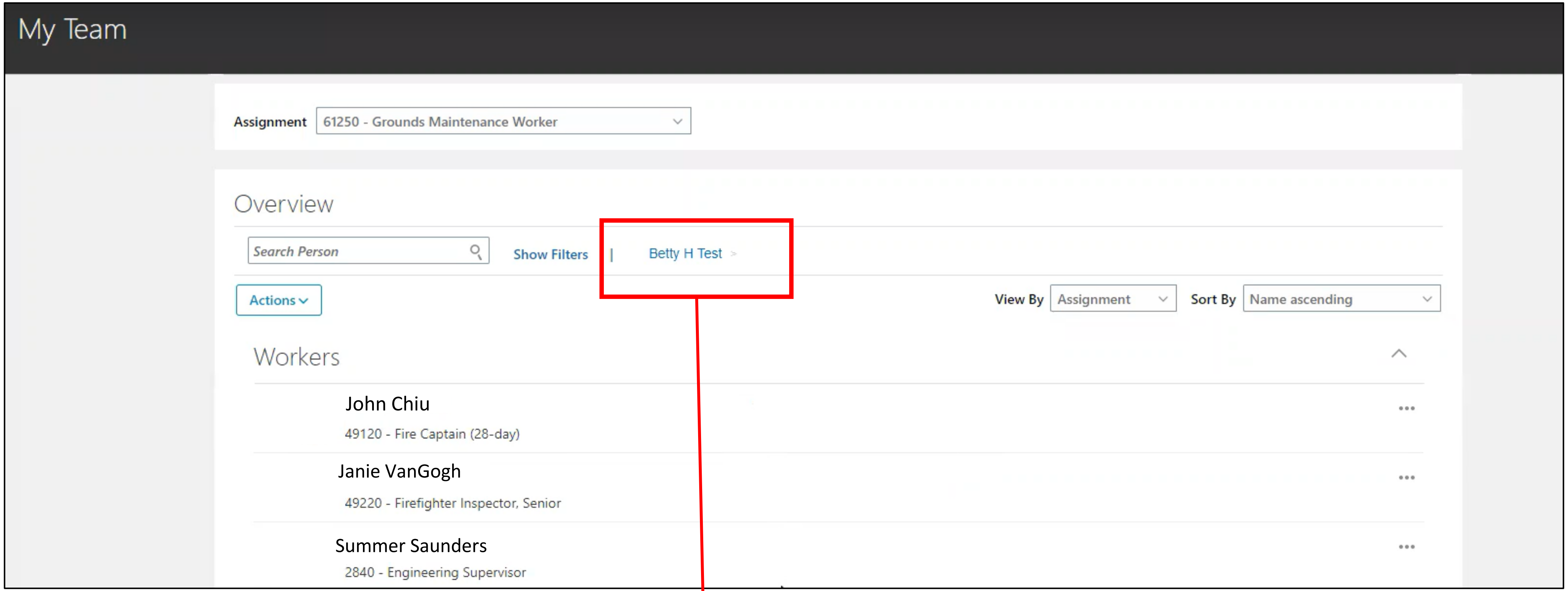
View Direct and Indirect Report Hierarchy



3

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

View Direct and Indirect Report Hierarchy



!

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)

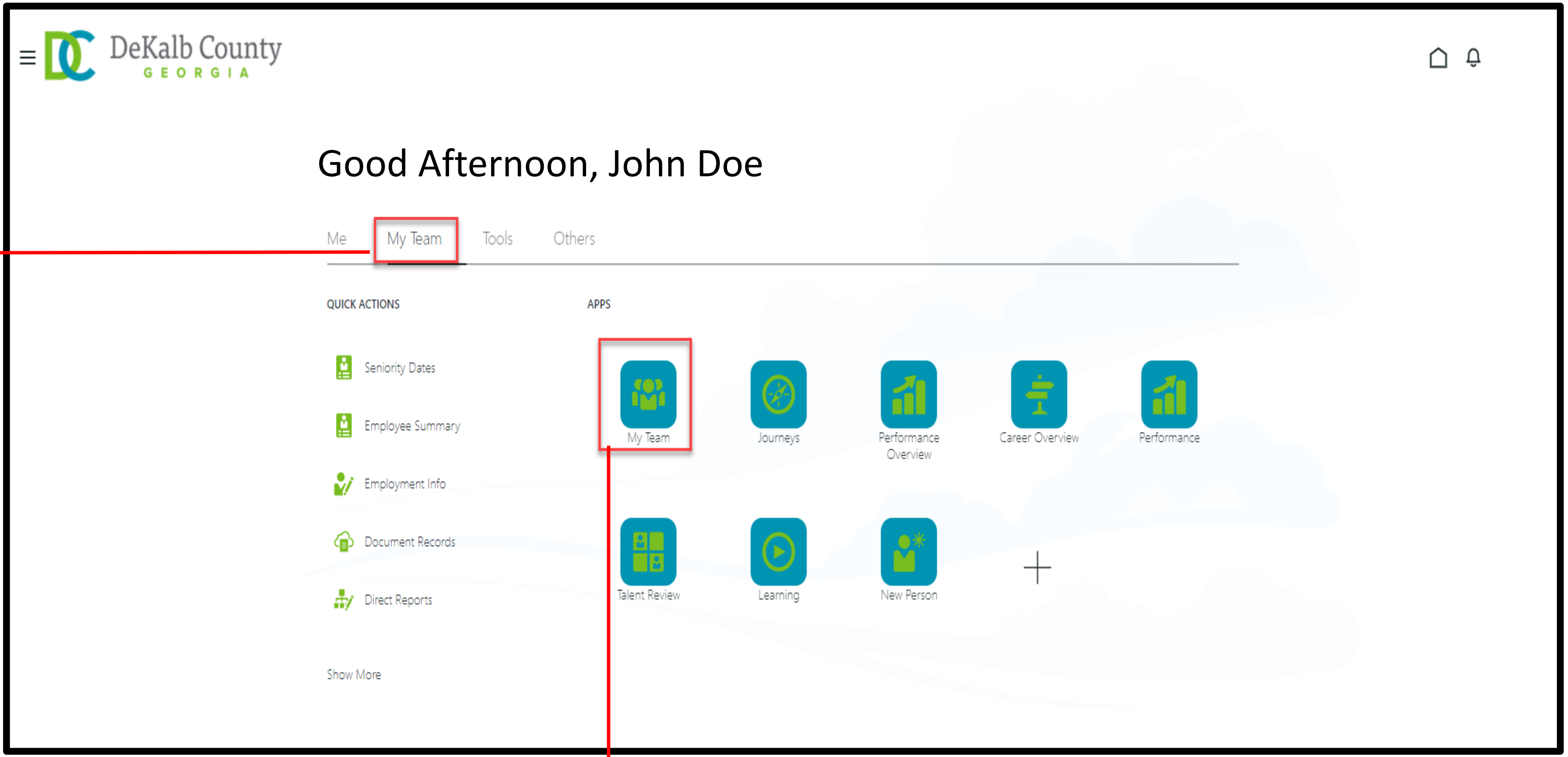
CloudVergent 360

Lesson Objective:

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

Objective
• Change Location of an Employee

Change Location



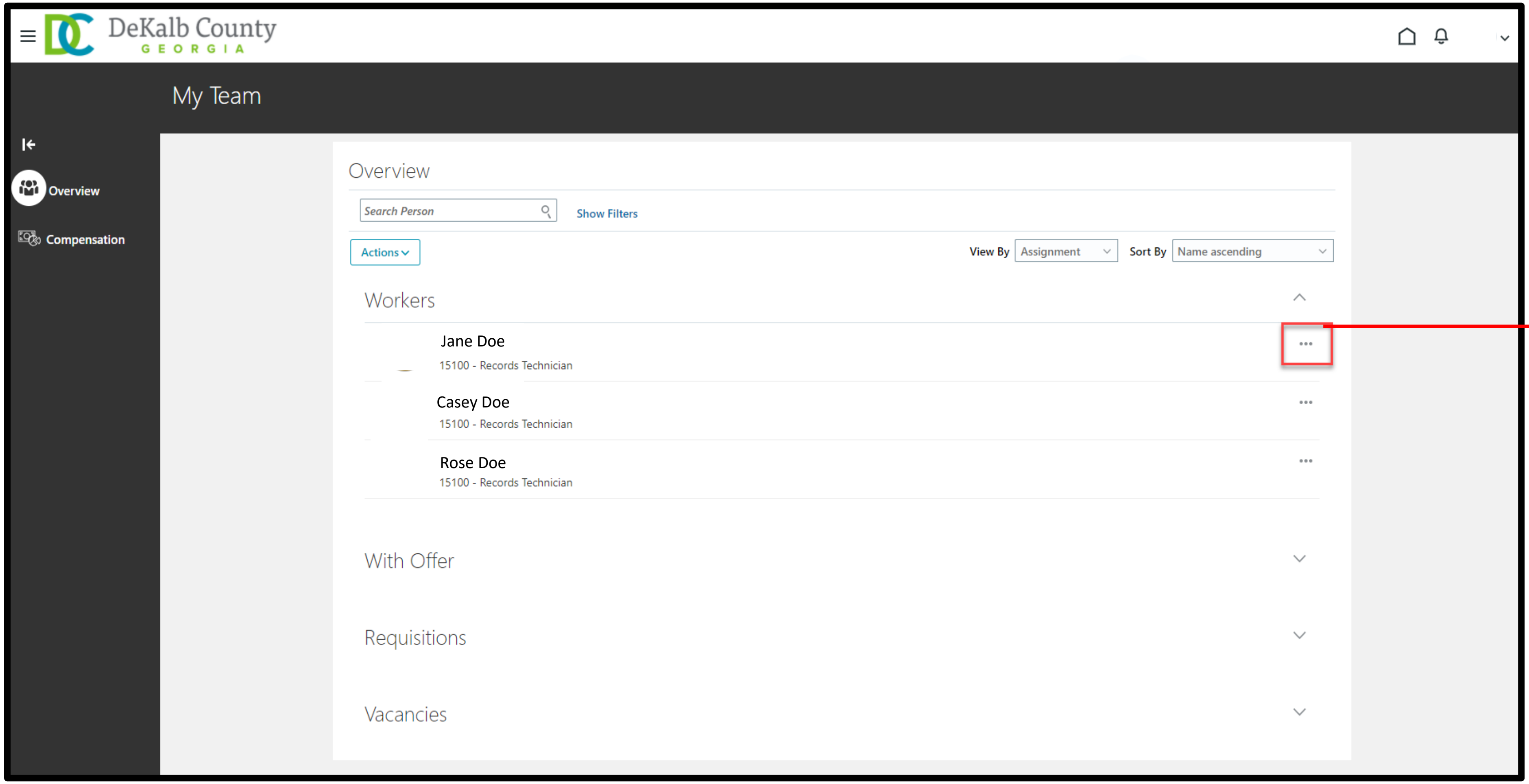
1

Select the **My Team** tab from the CV360 Home page

2

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

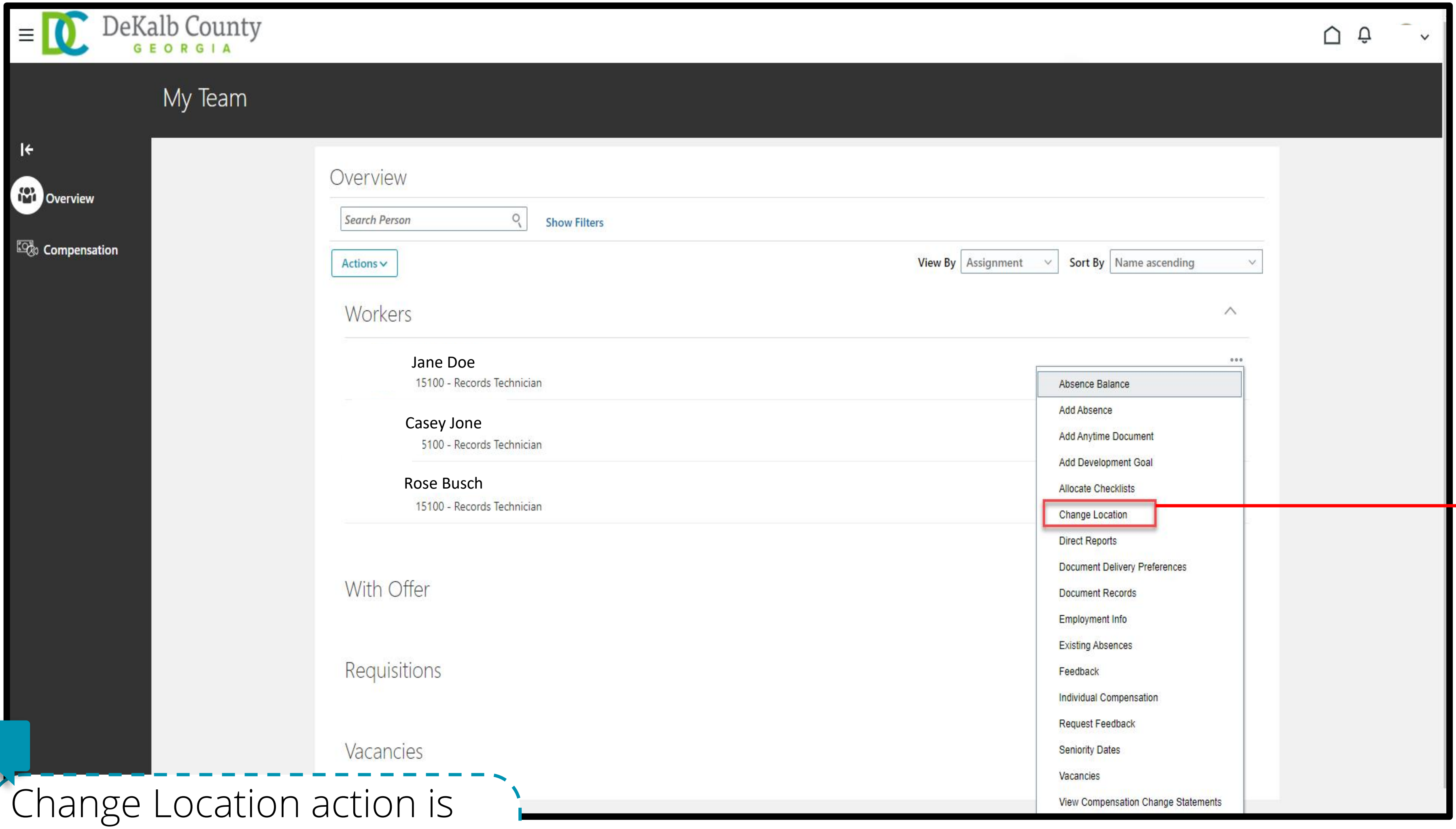
Change Location



3

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

Change Location



4

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

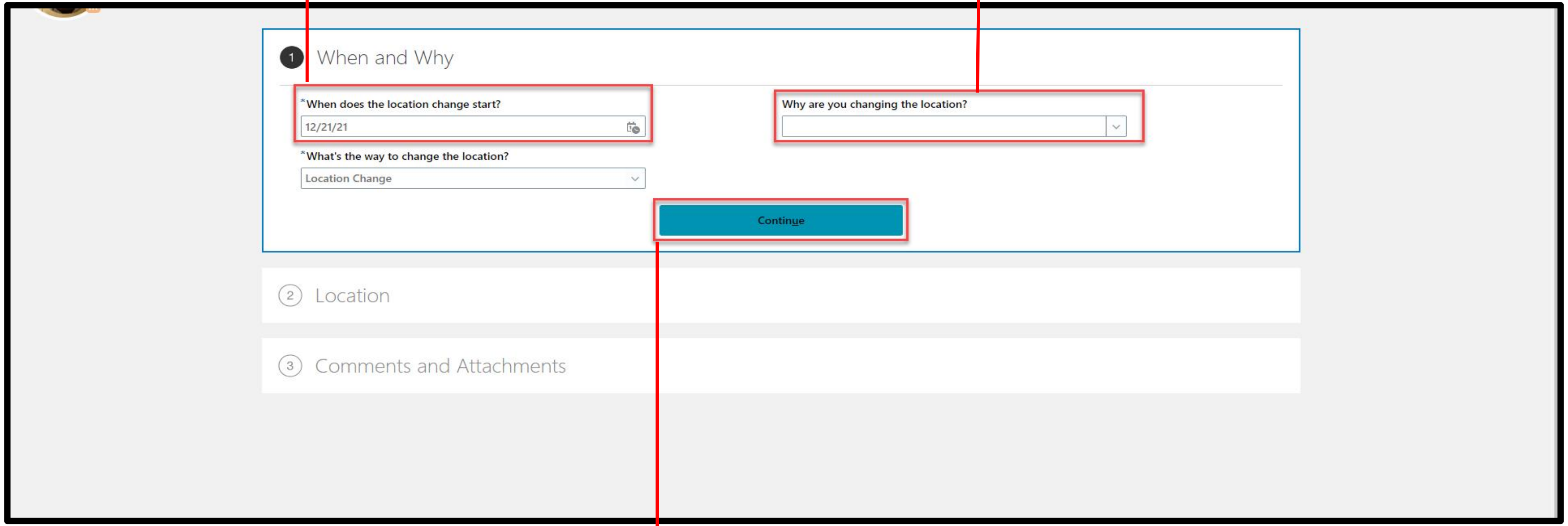
!

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

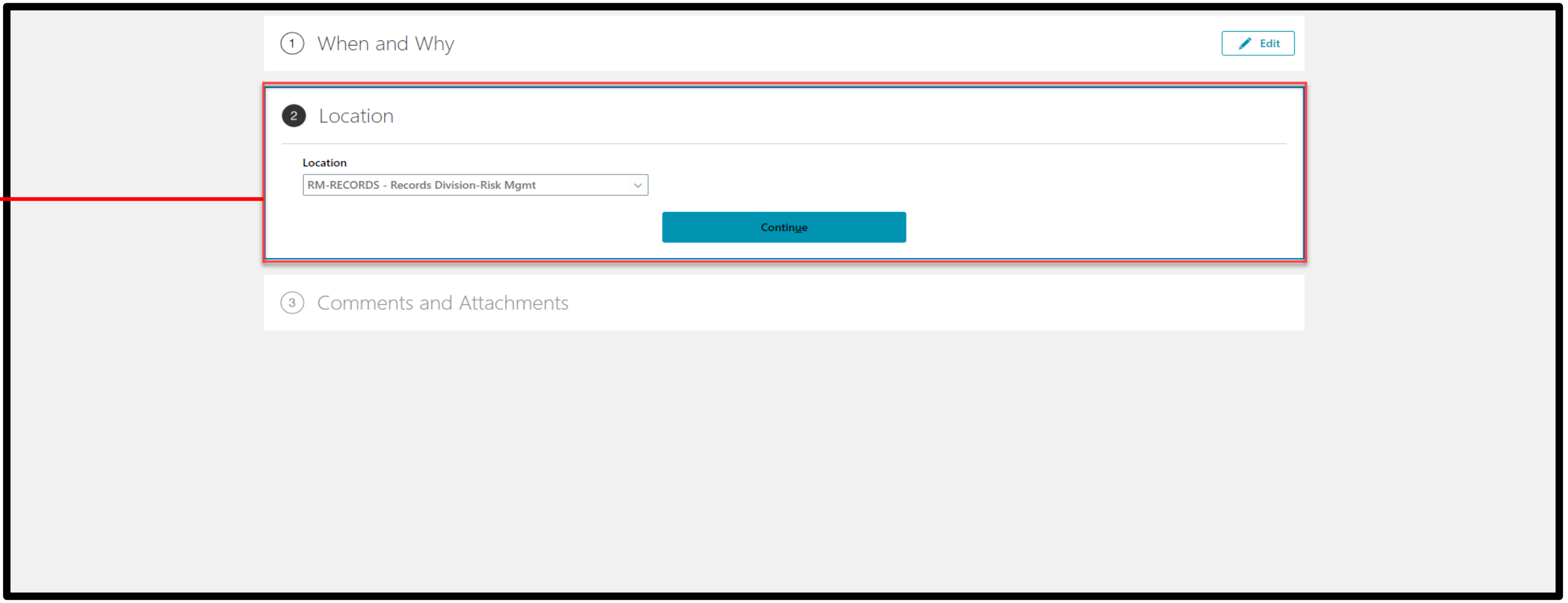


7 Select the Continue button

Change Location

8

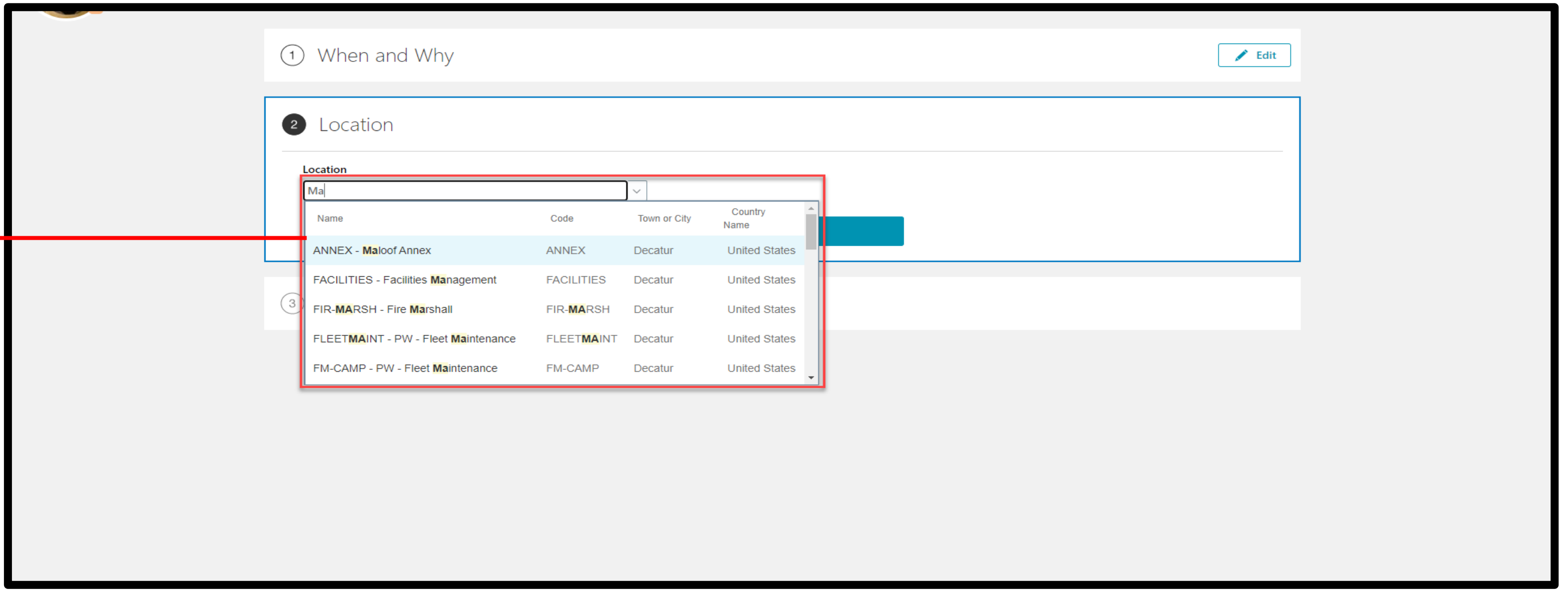
Selecting the **Continue** button will open the Location Section with the Current Location already populated. You can remove the Current Location from the Location field and start keying in the new Location and selecting the correct Location from the suggestions



Change Location

9

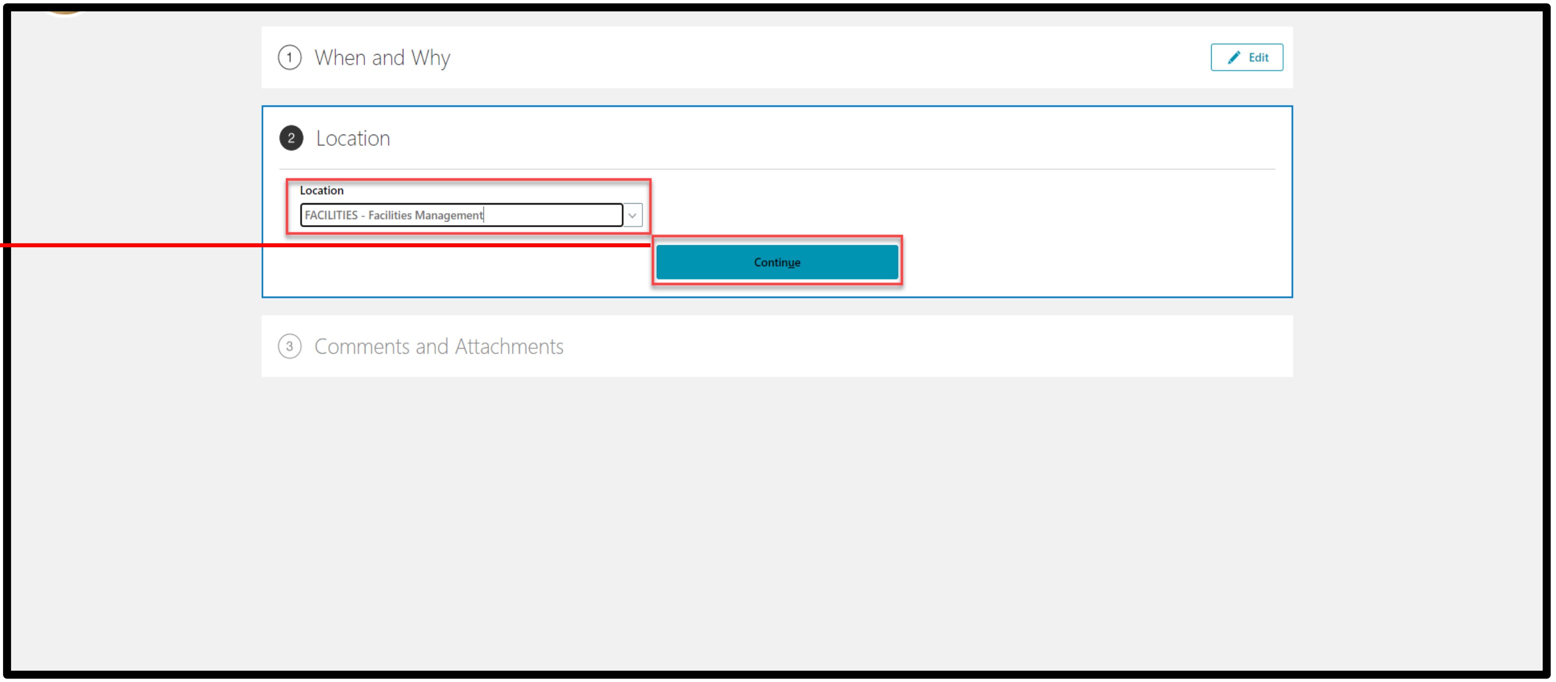
Select the appropriate Location from the drop-down list



Change Location

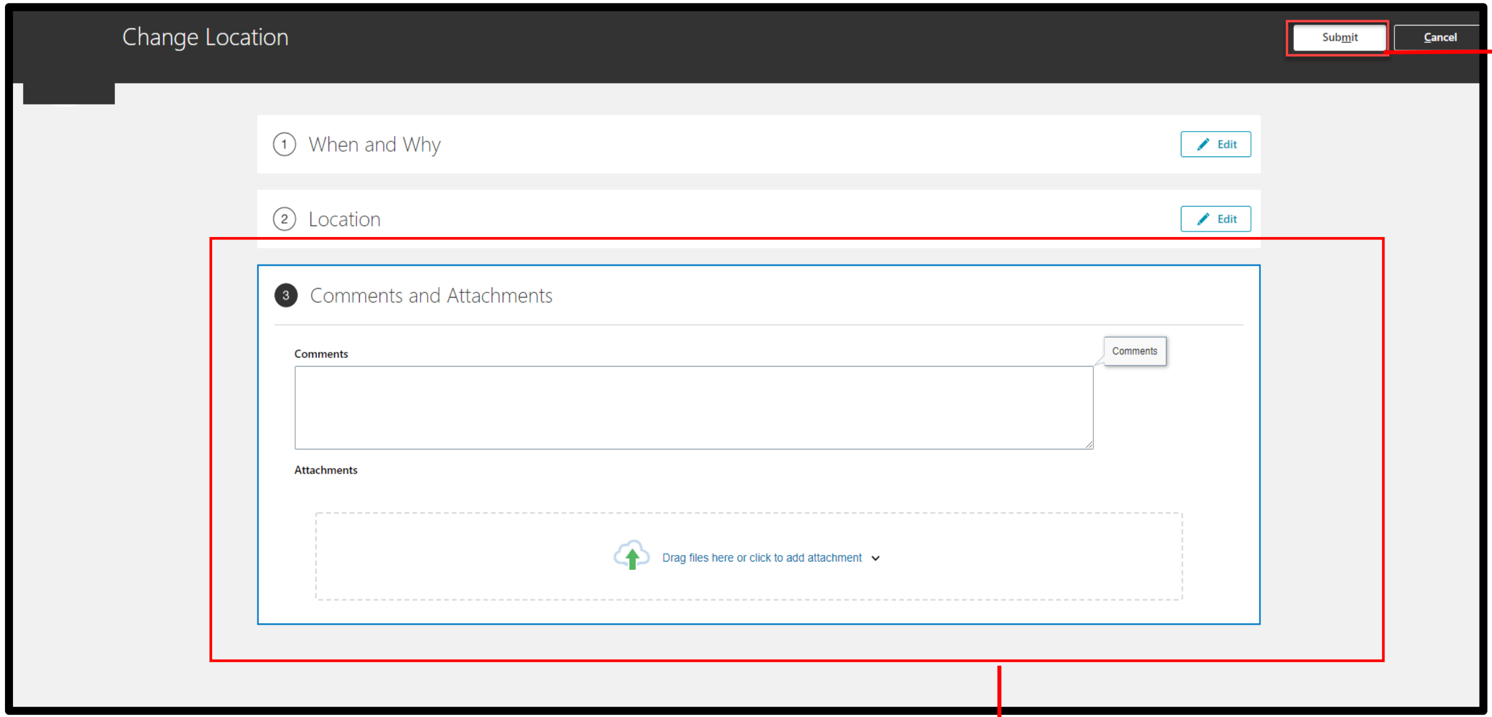
10

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



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



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

Lesson 4: View Document Records (Core HR)

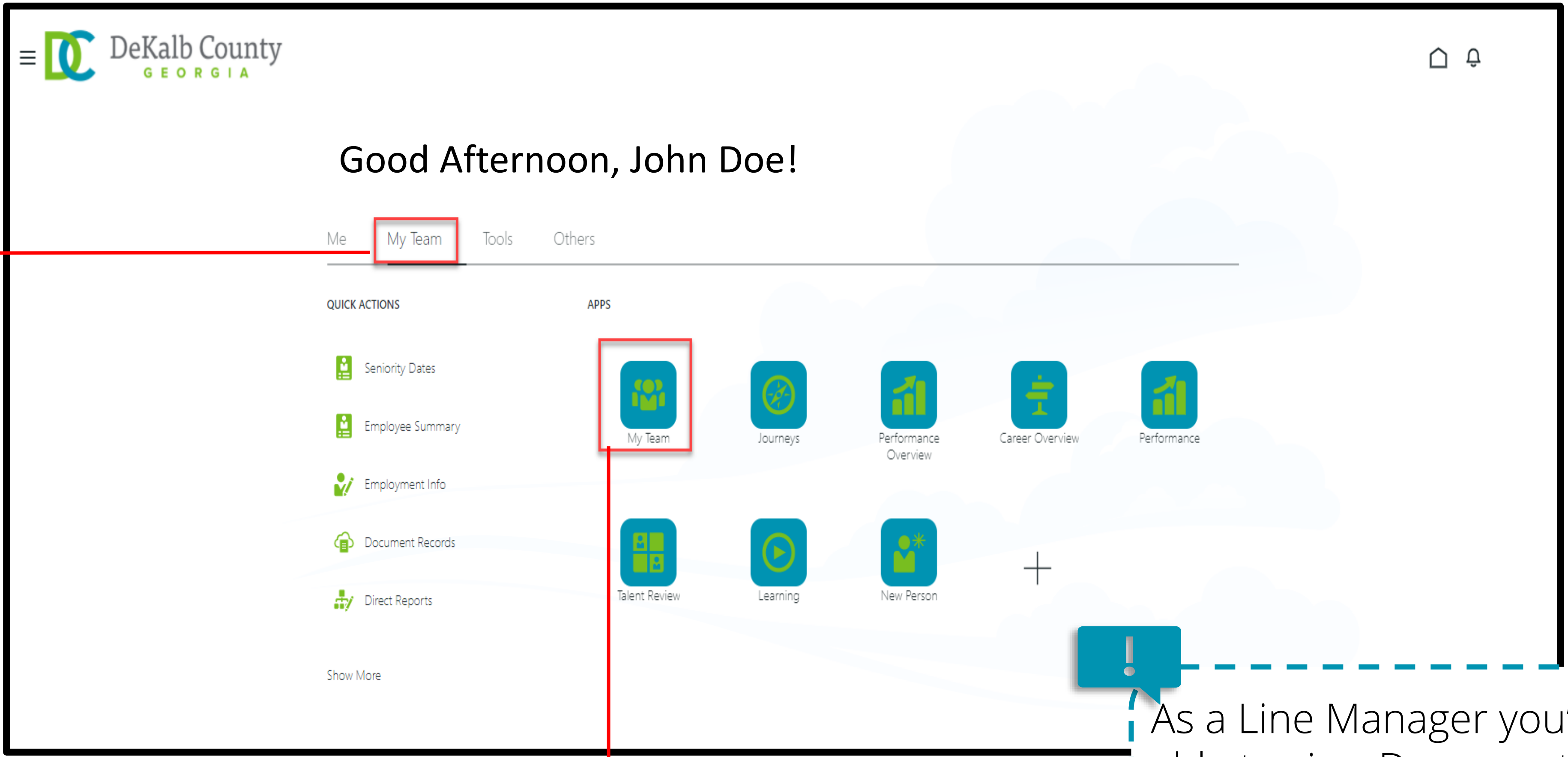
CloudVergent 360

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

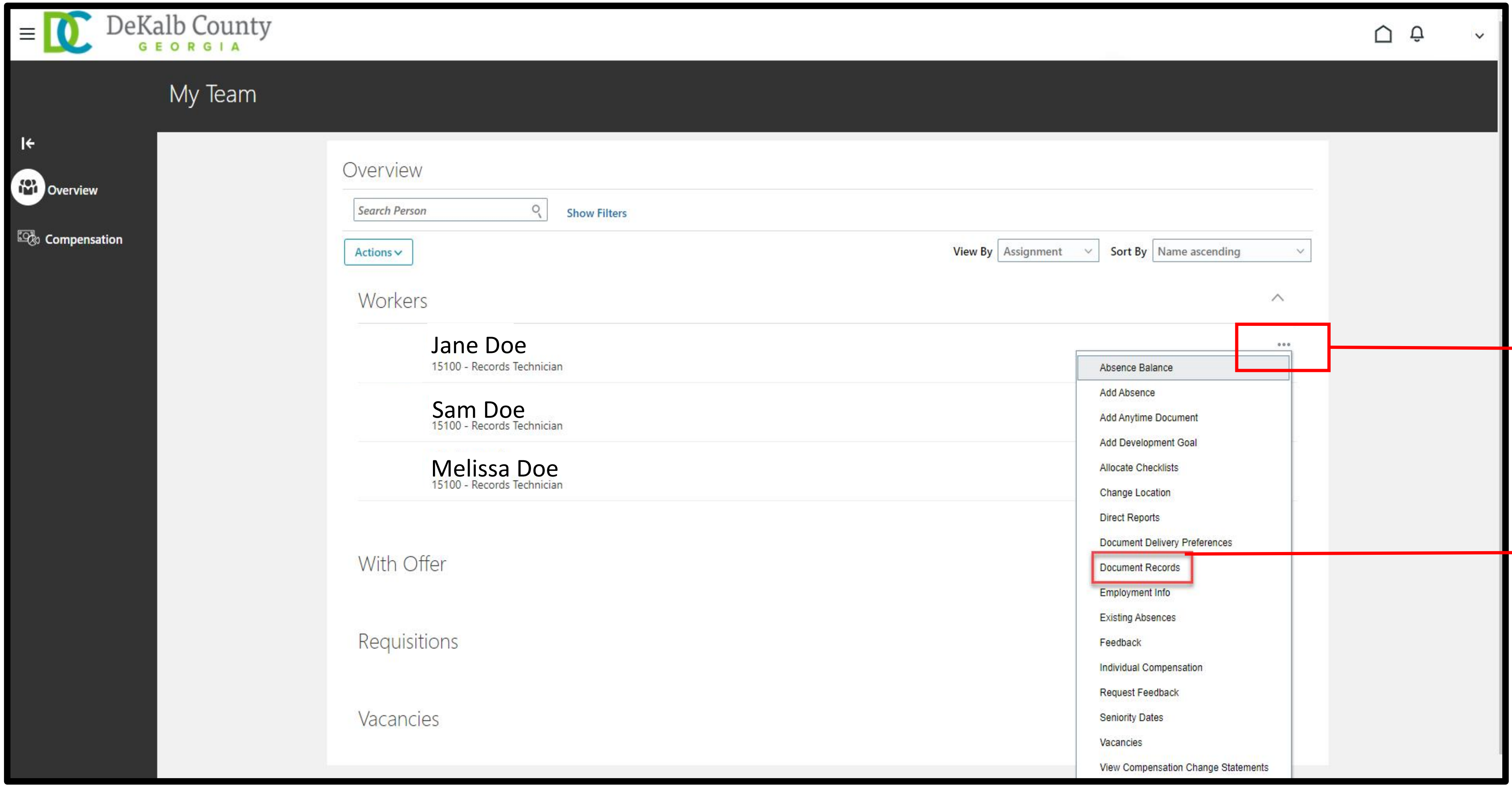
2

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



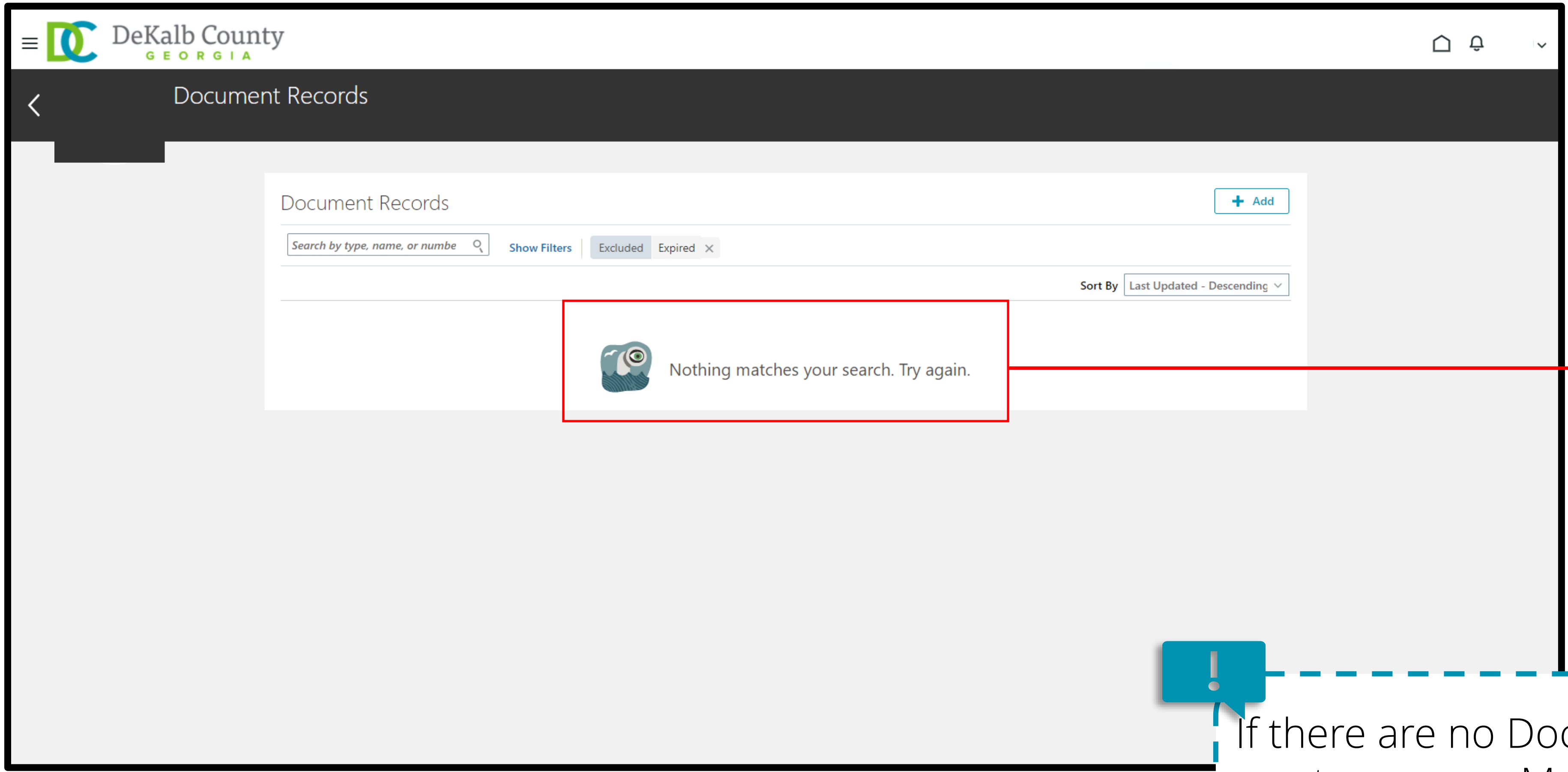
3

Select Ellipses button

4

Select Document Records from the options Ellipses drop-down list

View Document Records



4

Any Document Records will display here, if available

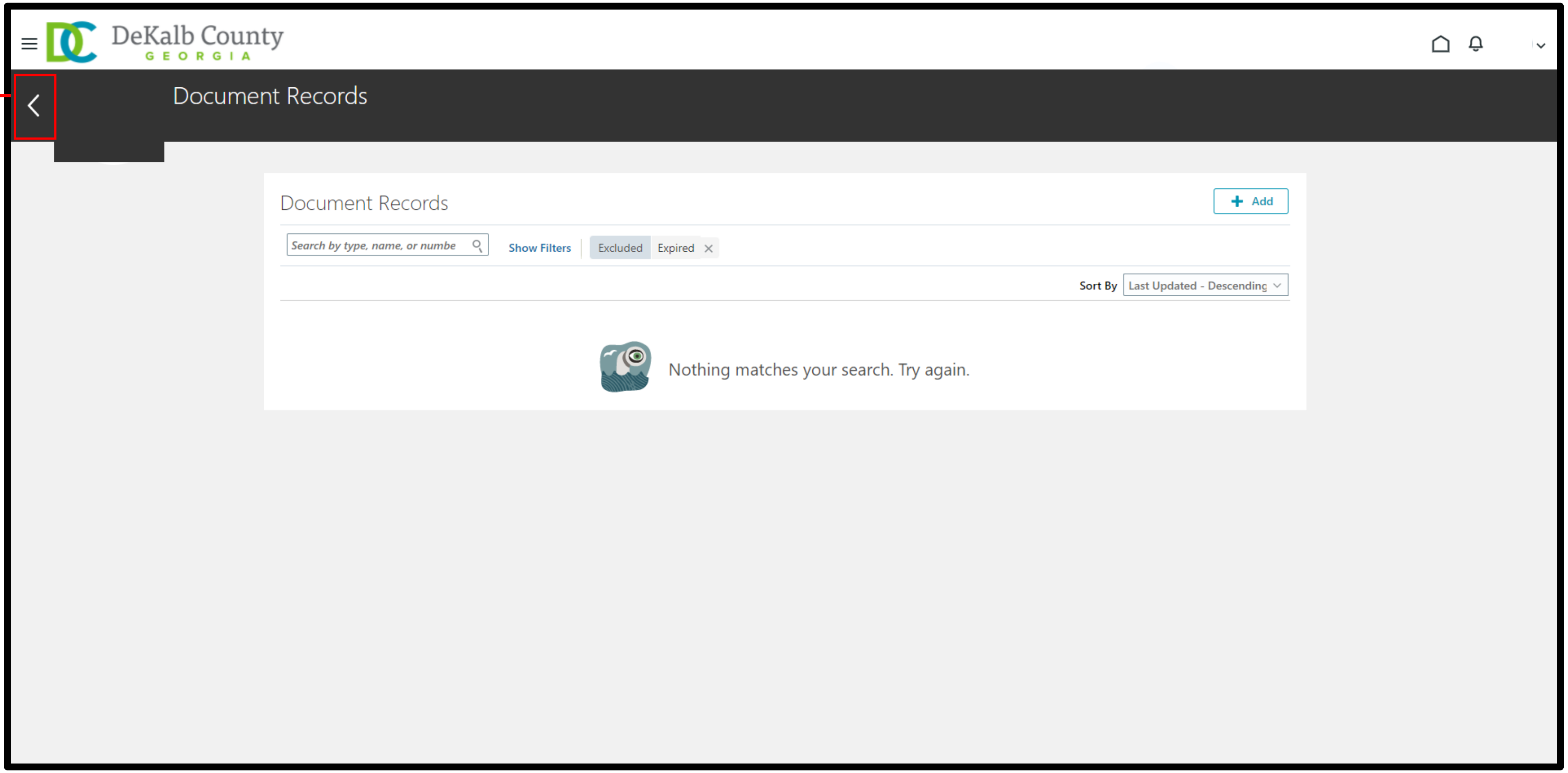
!

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

Lesson 5: View Employment Information (Core HR)

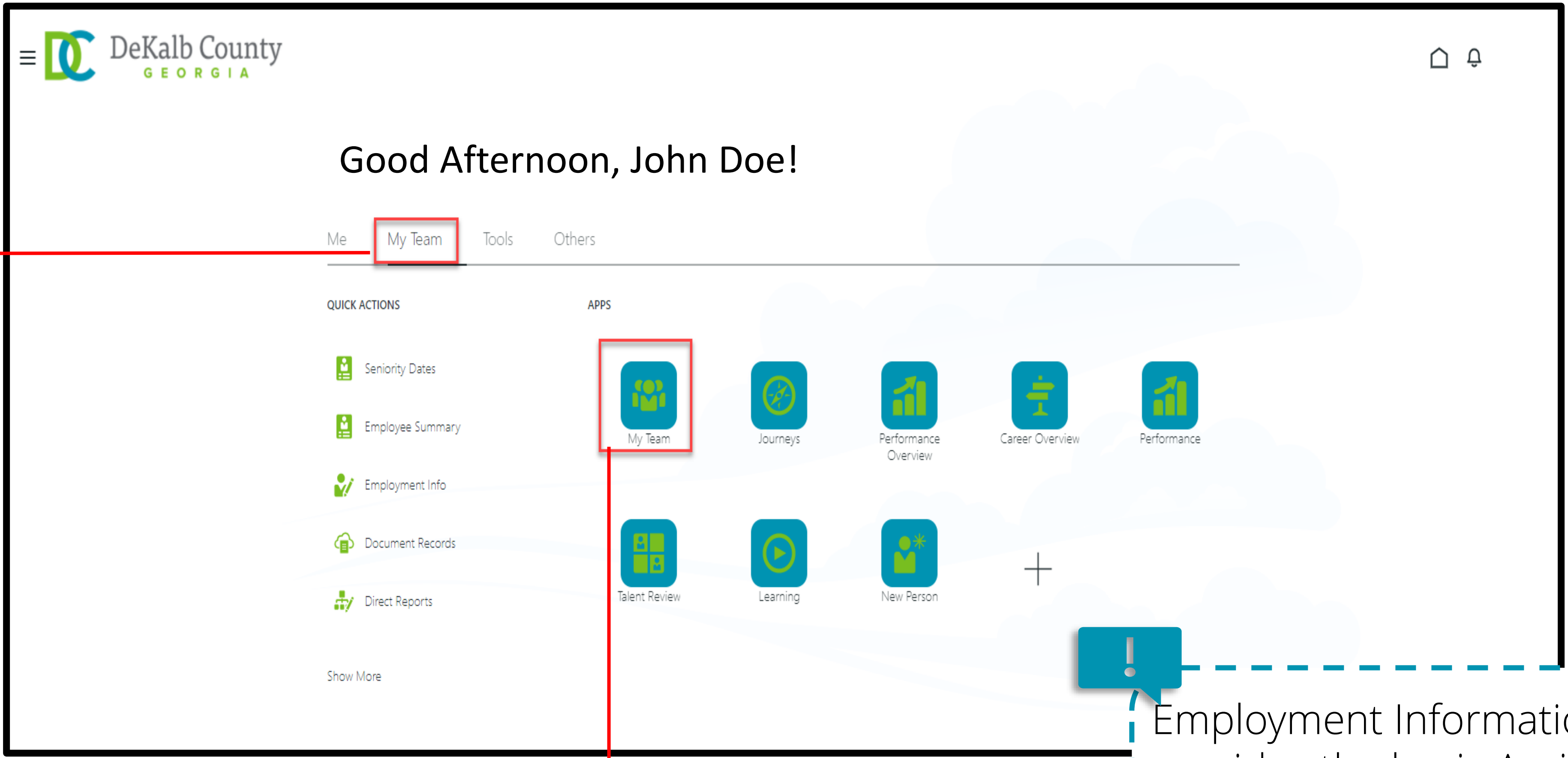
CloudVergent 360

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

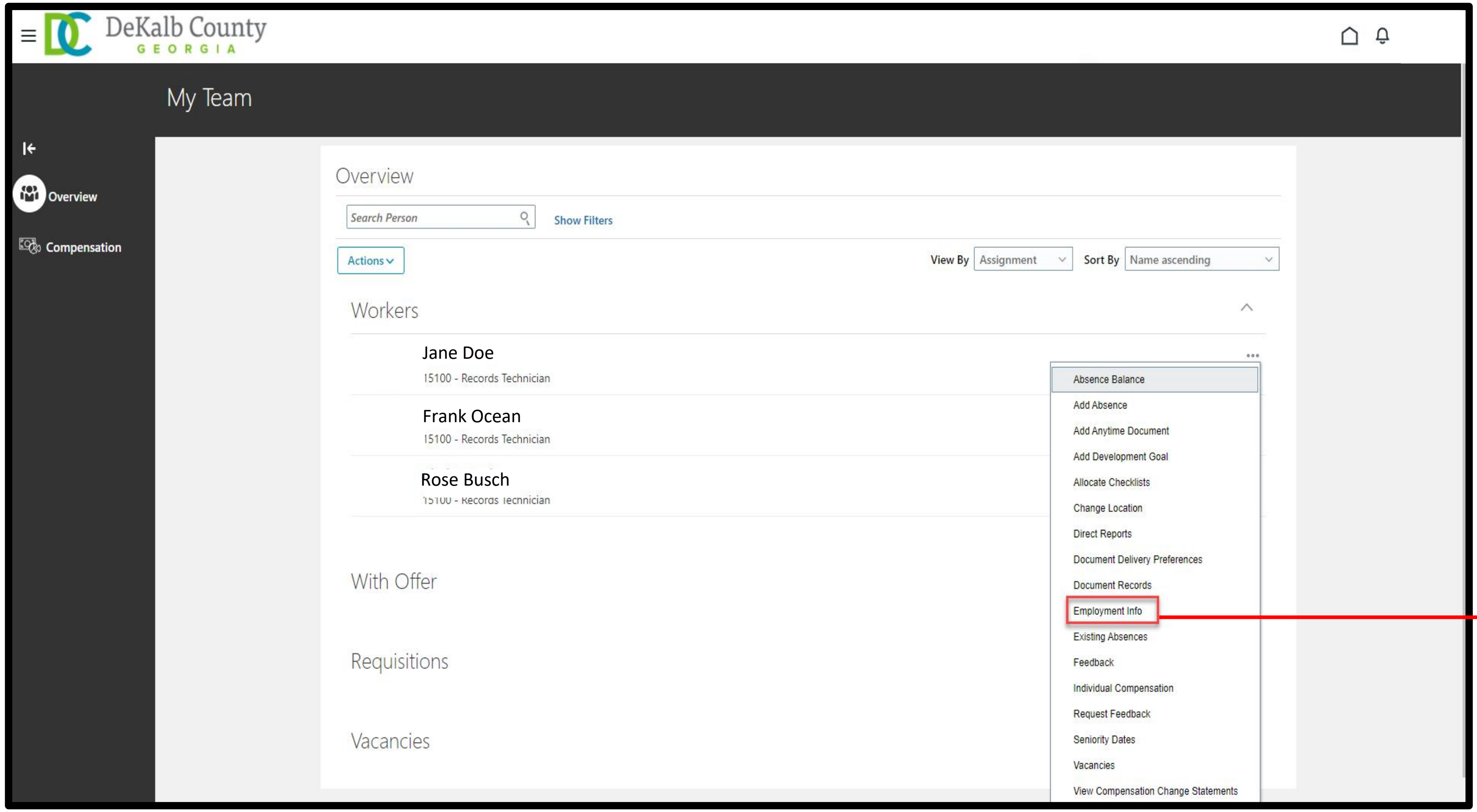
2

Select the **My Team** tile

!

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

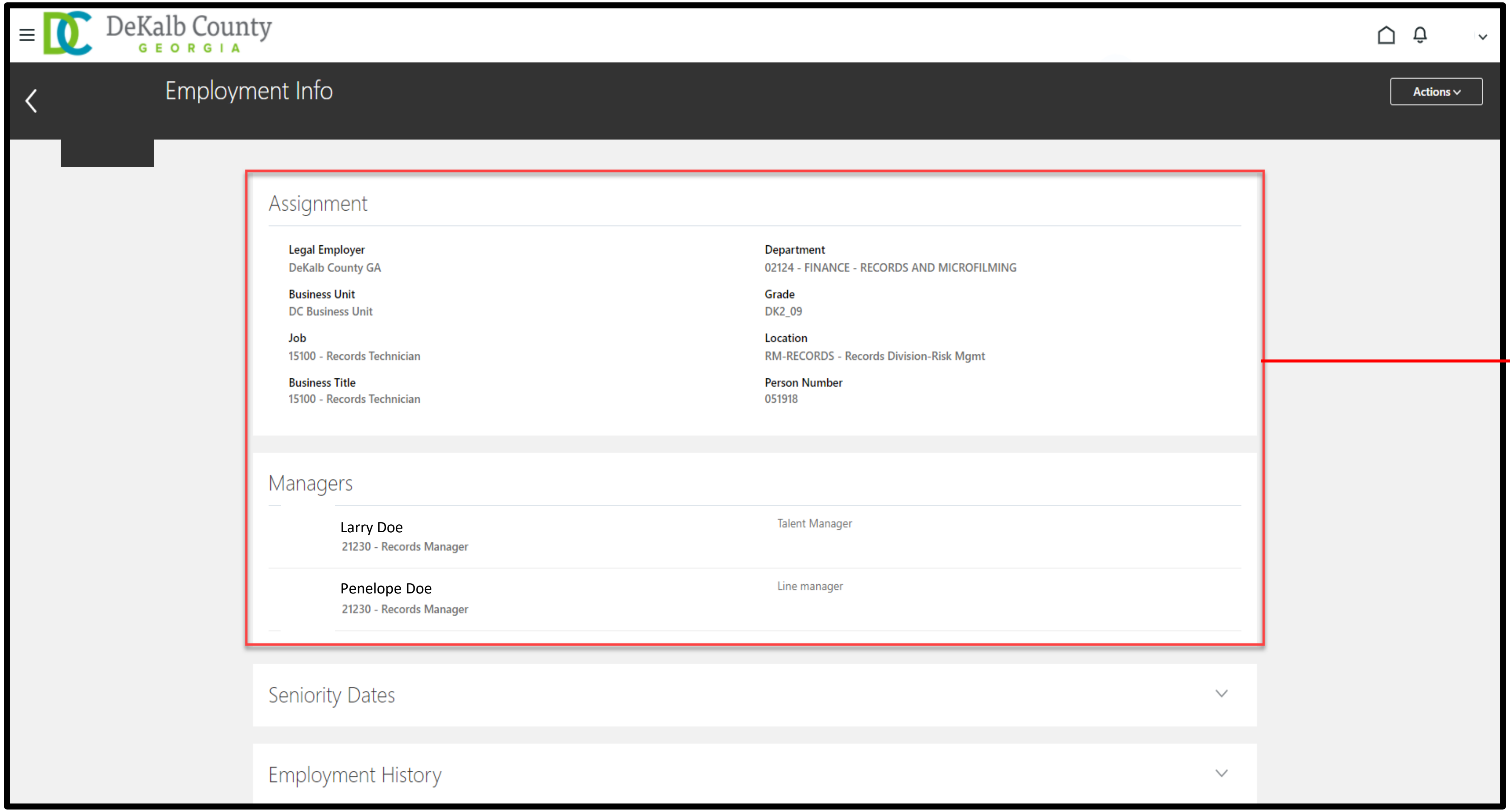
View Employment Information



3

Select Employment Info from the Ellipses drop-down list

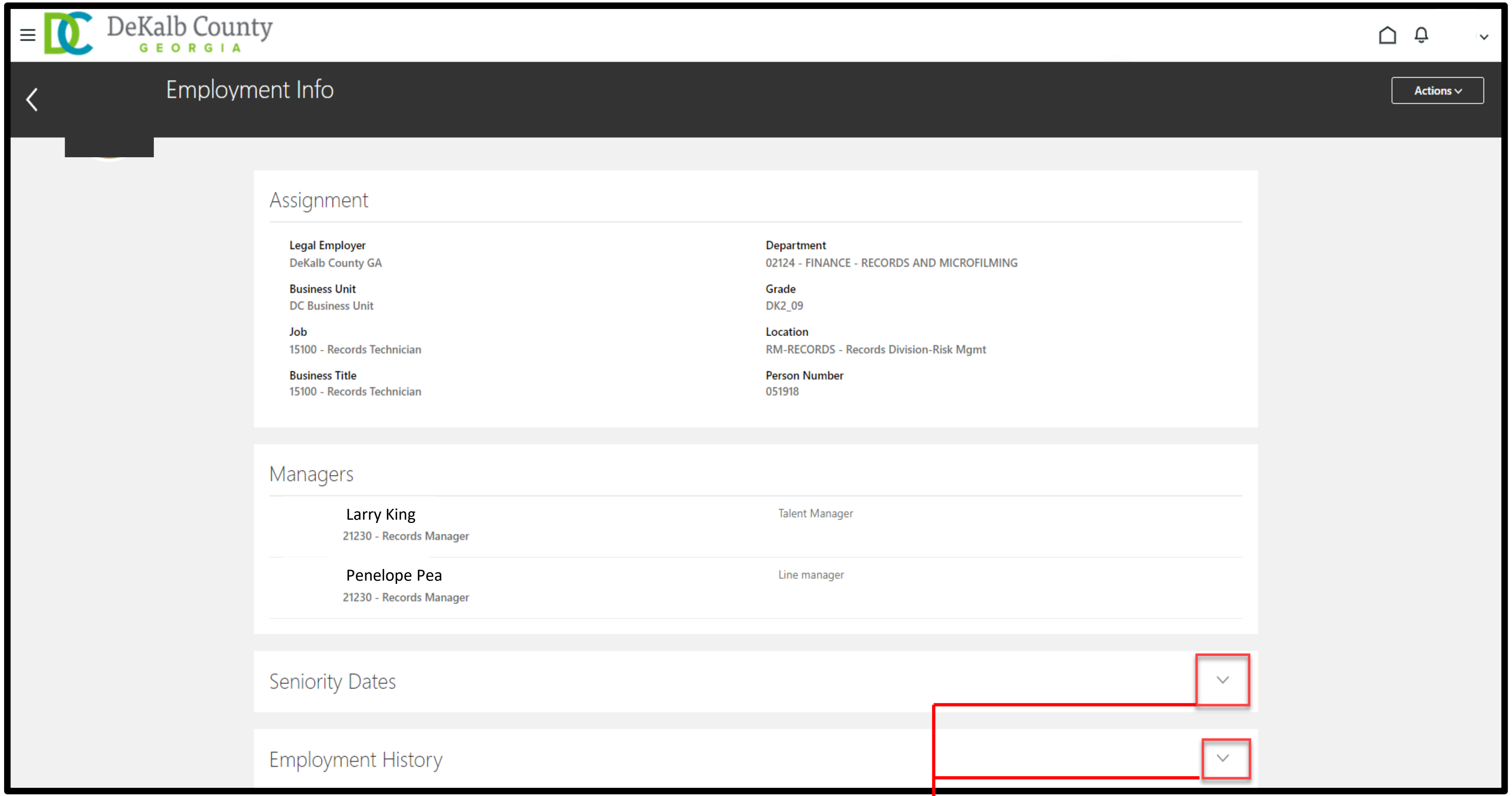
View Employment Information



4

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

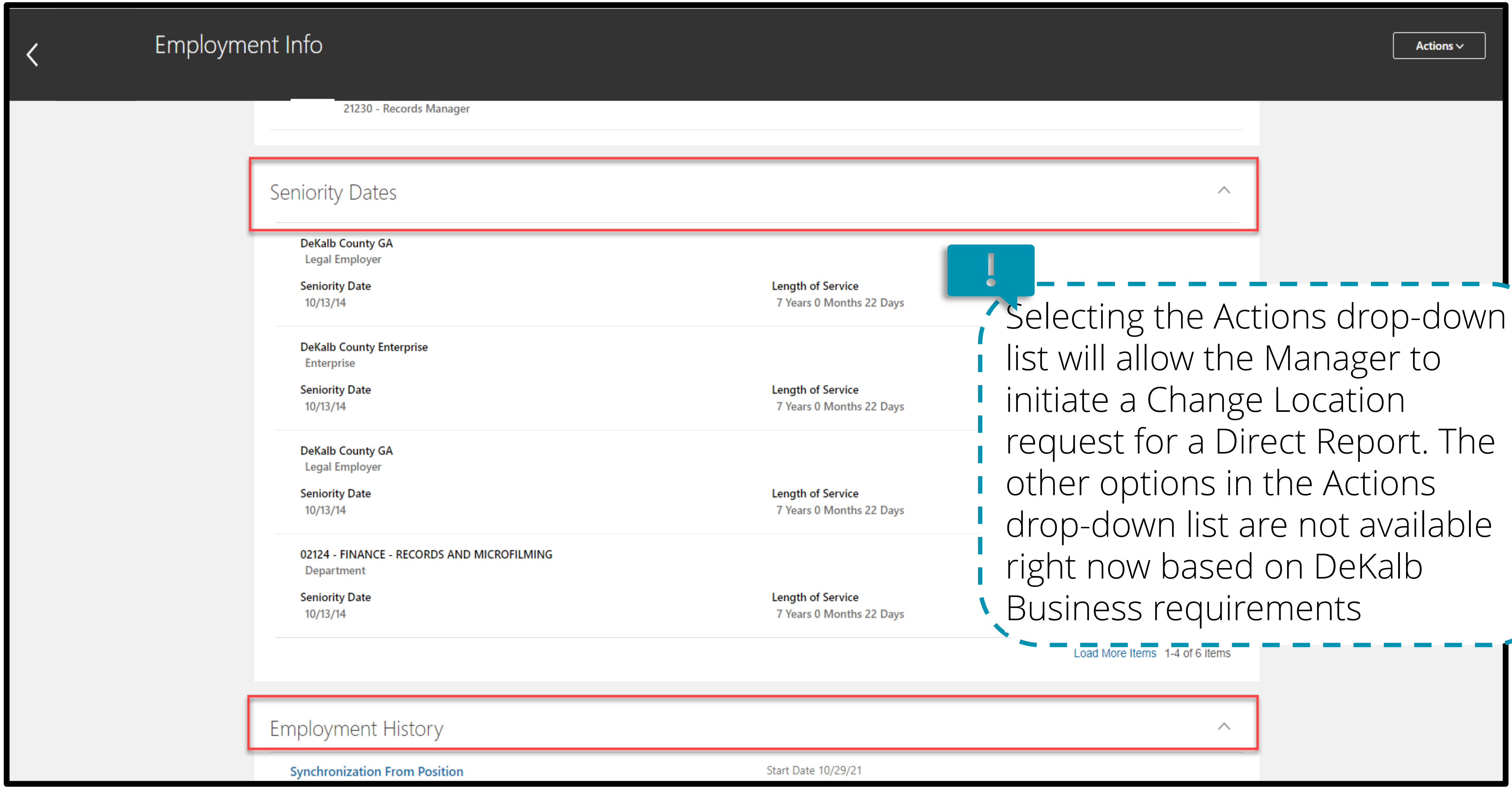
View Employment Information



5

Select the arrow to expand the individual sections

View Employment Information

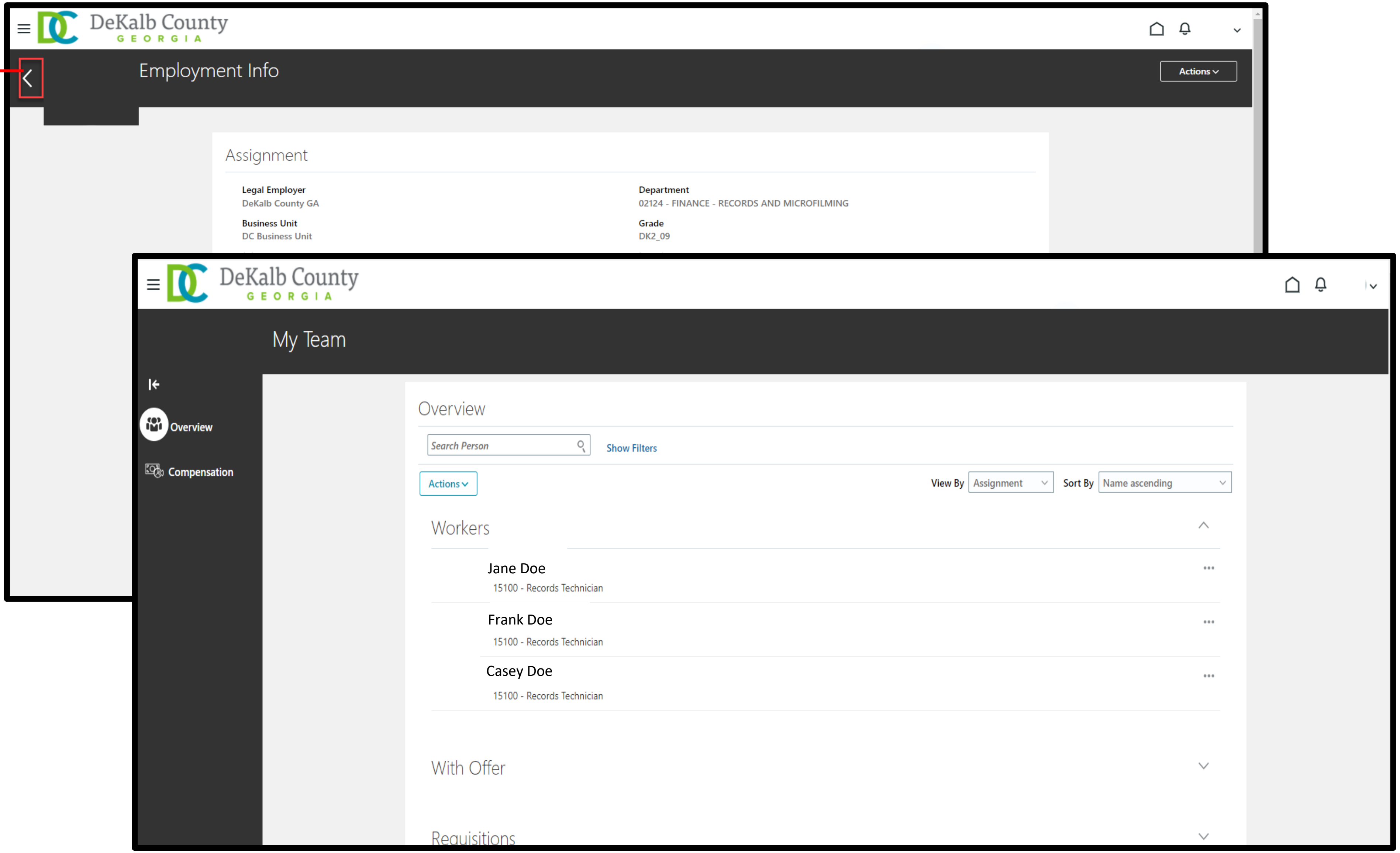


Selecting the Actions drop-down list will allow the Manager to initiate a Change Location request for a Direct Report. The other options in the Actions drop-down list are not available right now based on DeKalb Business requirements

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

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

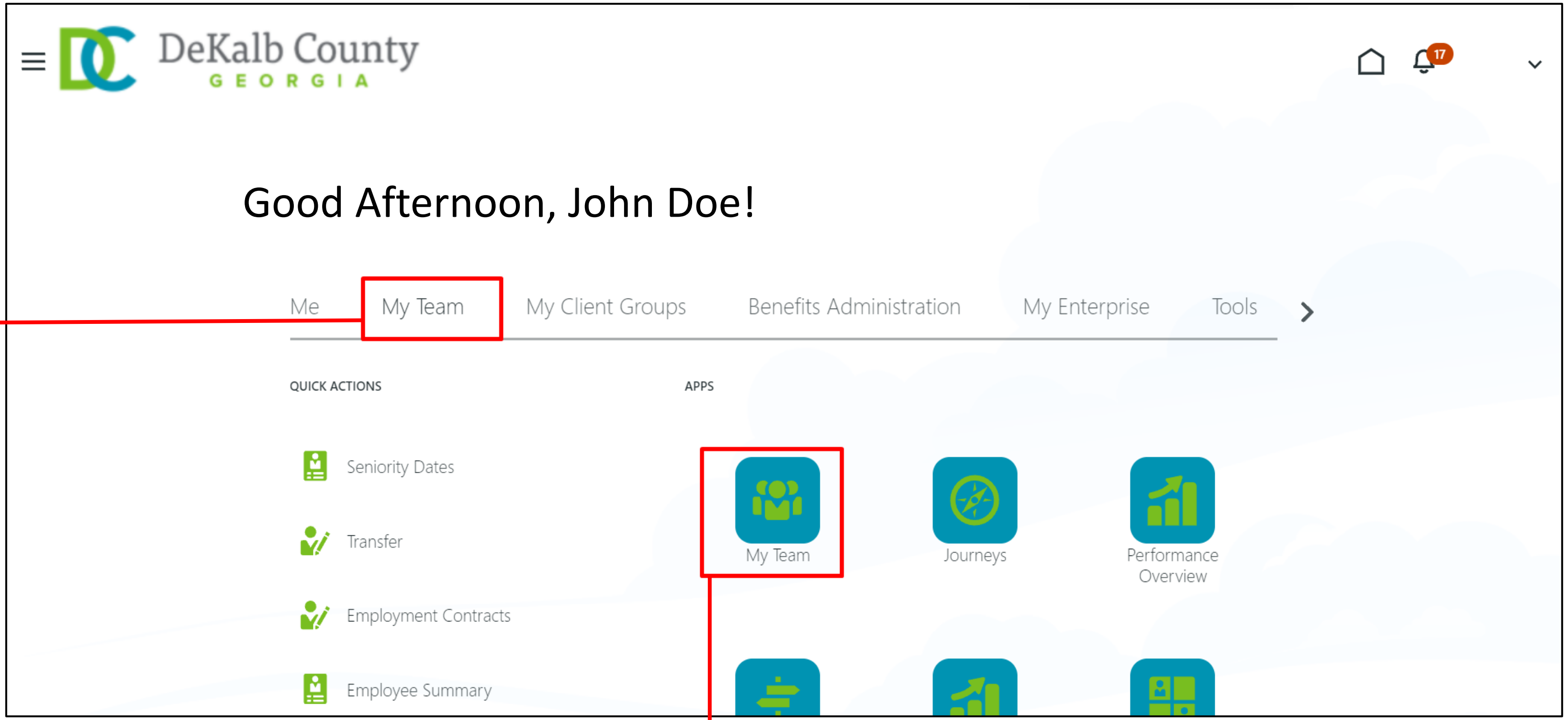
CloudVergent 360

Lesson Objective:

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

Objective
• View Salary and Allowances information for Direct Reports

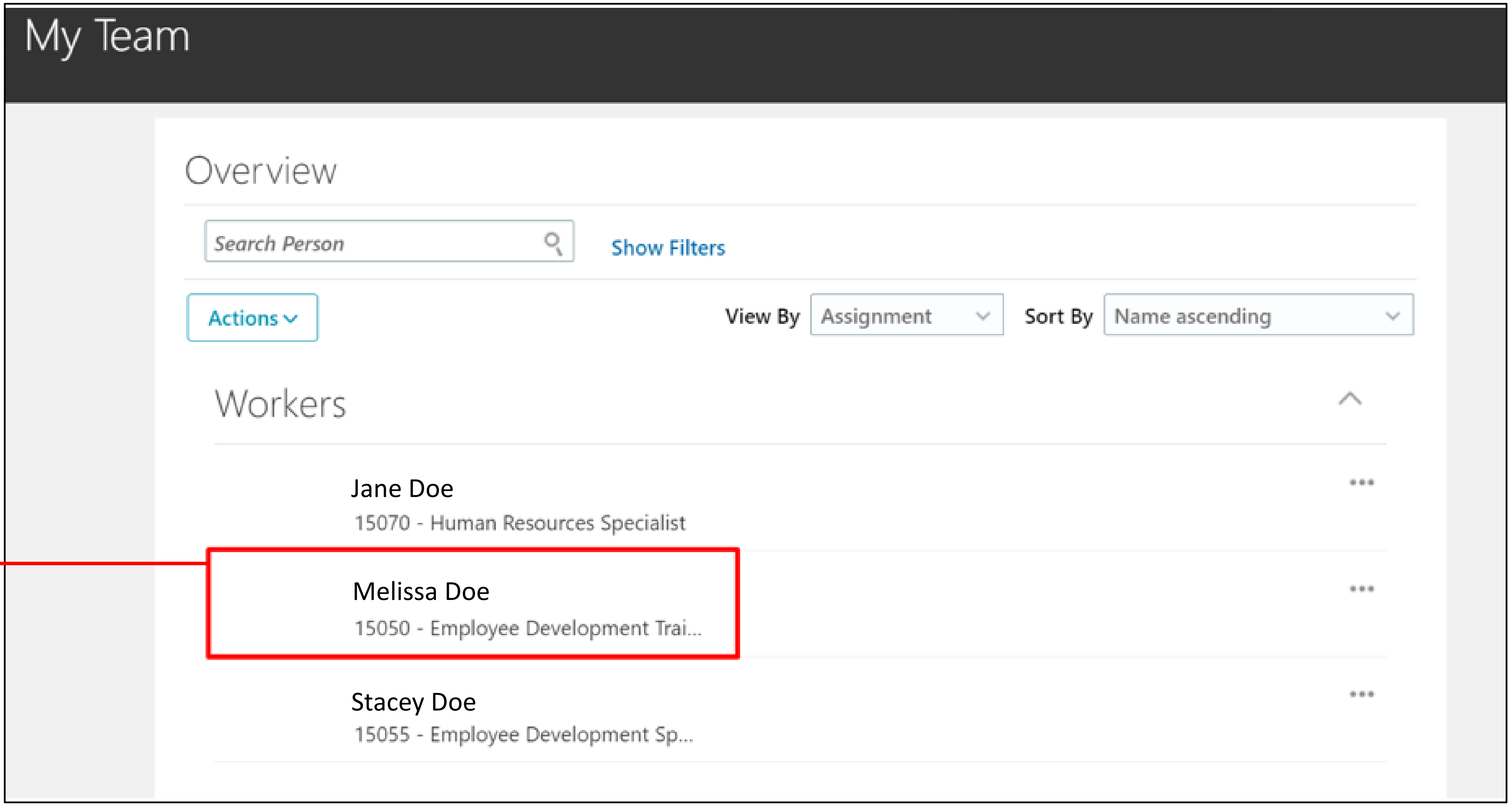
View Direct Report Salary and Allowances Details



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

2 Select the **My Team** tile

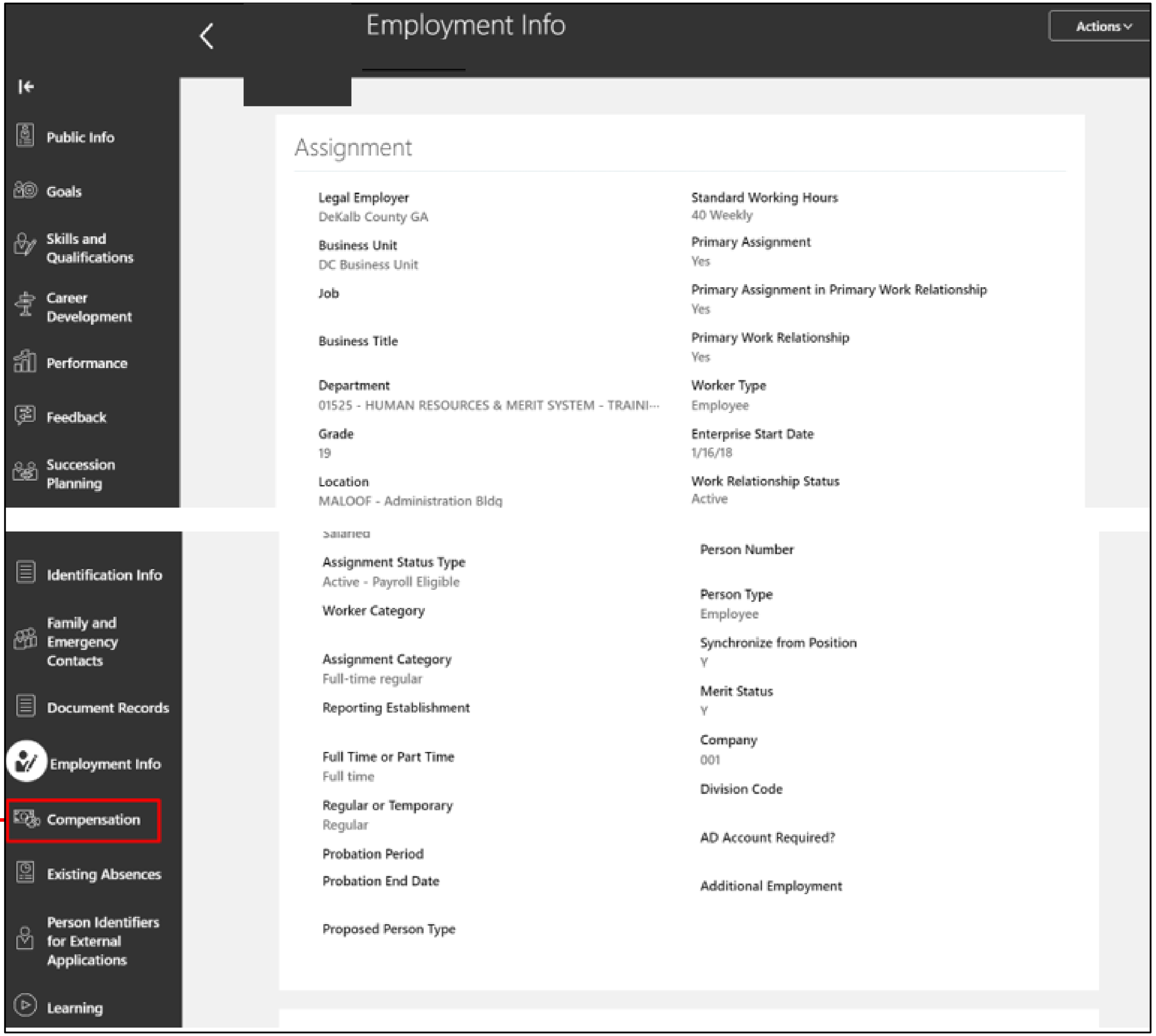
View Direct Report Salary and Allowances Details



3

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

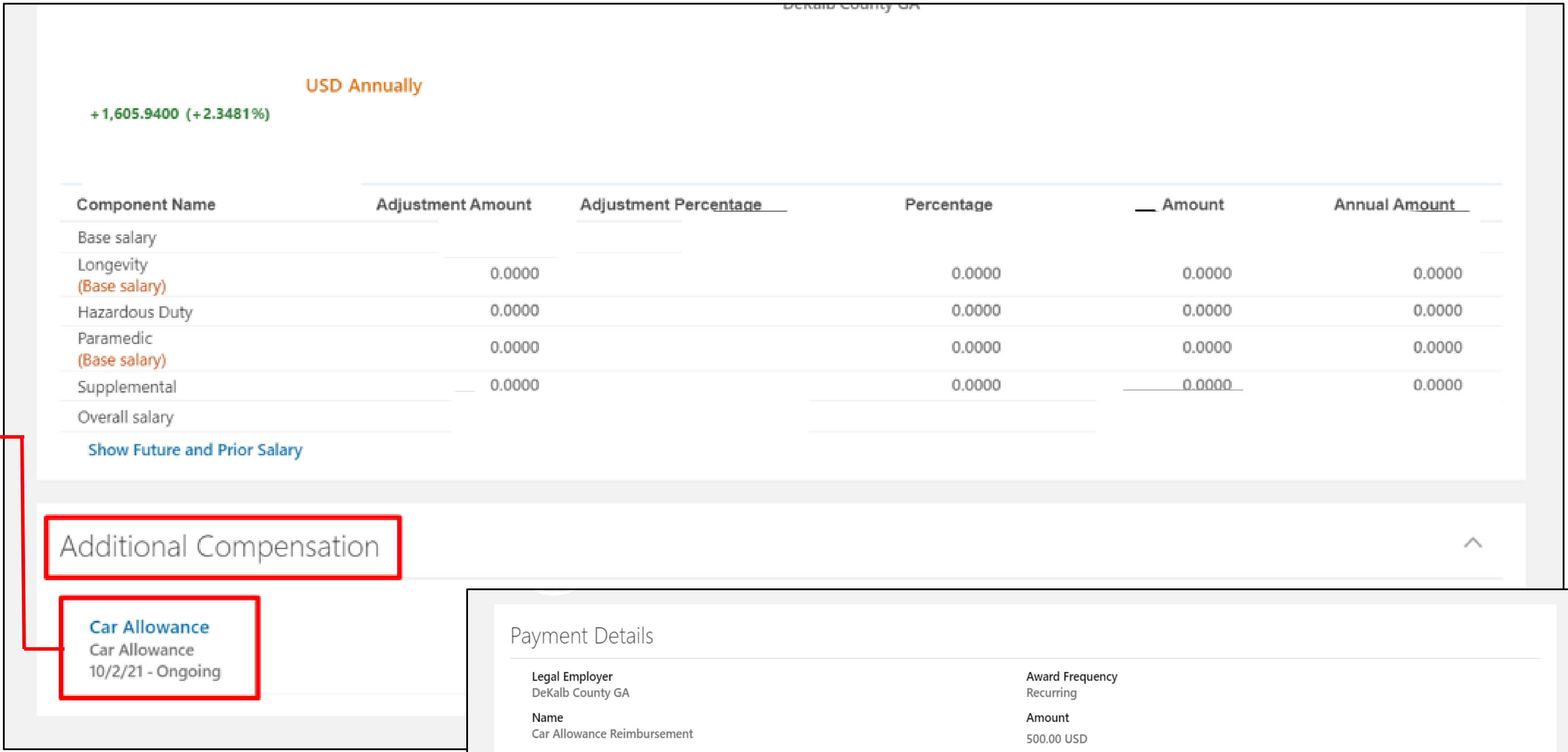
View Direct Report Salary and Allowances Details

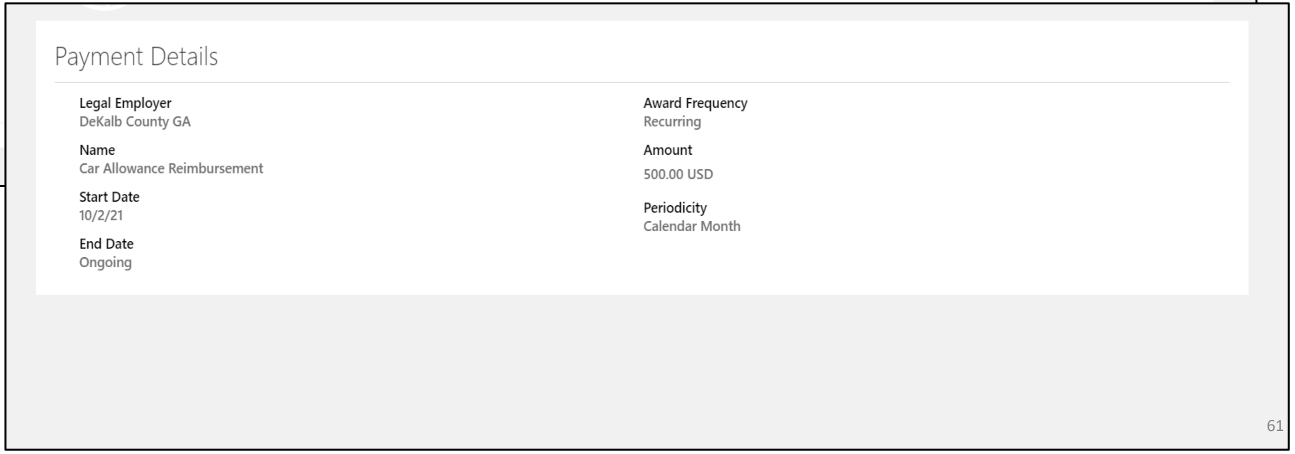


4

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

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

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

CloudVergent 360

Lesson Objective:

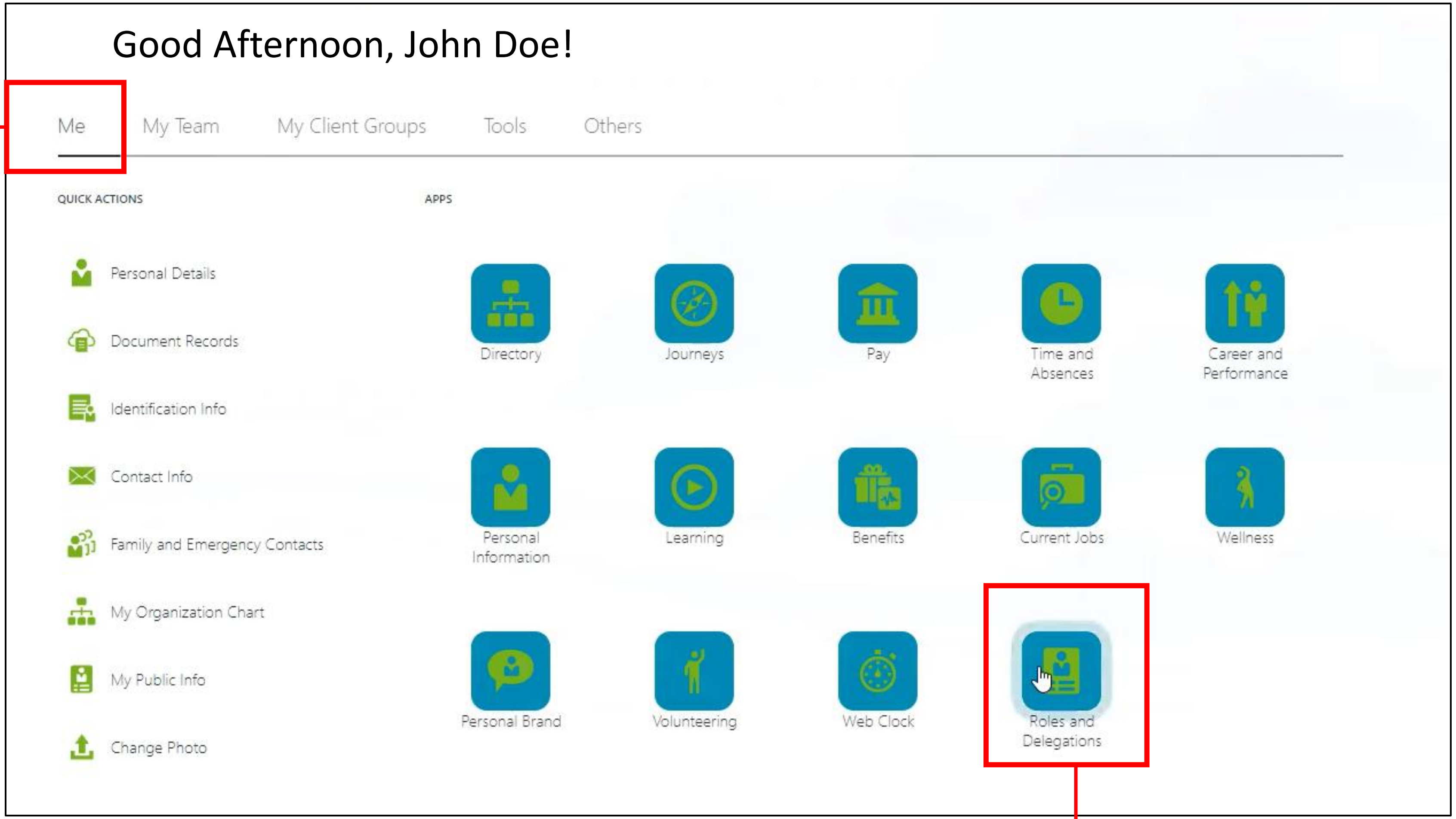
Upon the completion of the Create a Delegation Rule for Approvals Lesson, you will be able to:

Objective
• Submit a Delegation Rule for new Approvals

Create a Delegation Rule for Approvals

1

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



2

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

Create a Delegation Rule for Approvals

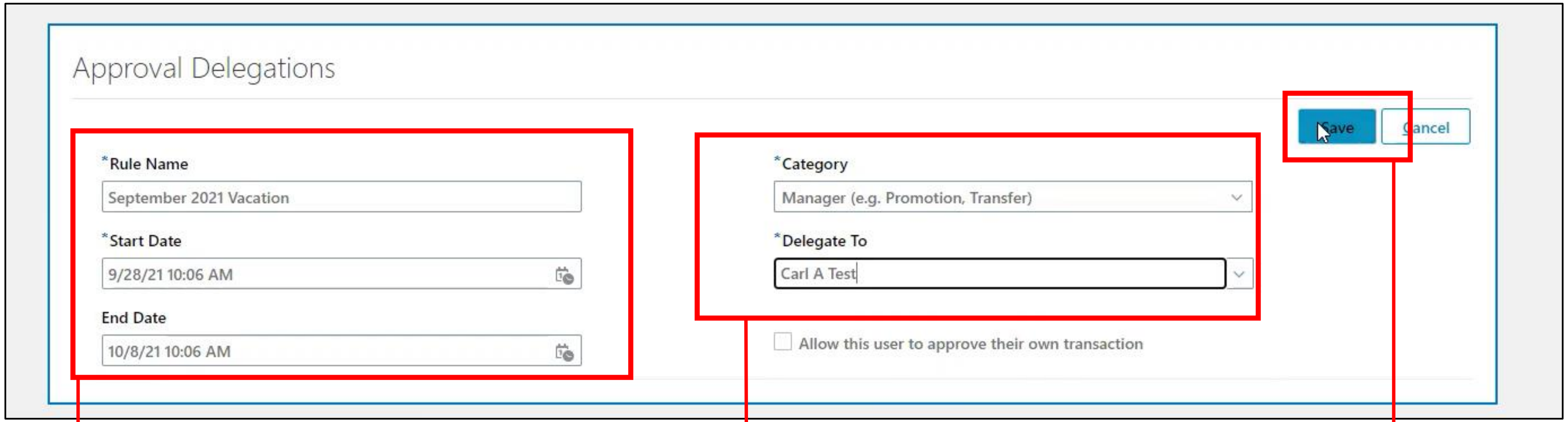
3

Select the drop-down chevron in the Approval Delegations section

4

Select the +Add button

Create a Delegation Rule for Approvals

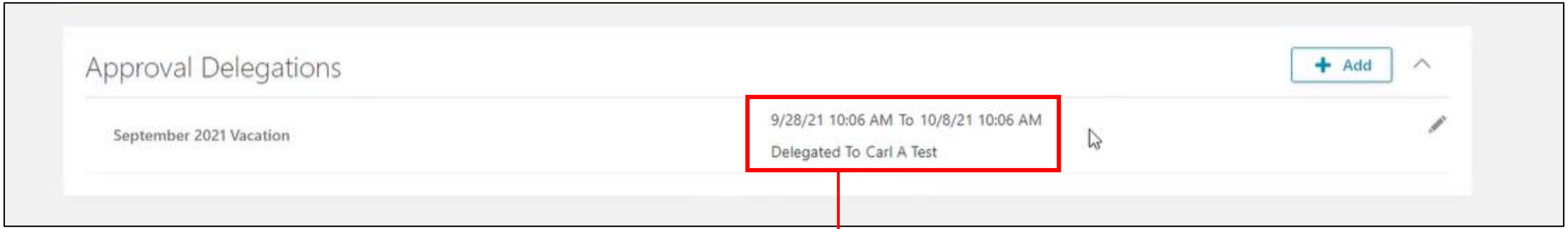


5 Key in the appropriate Rule Name, Start Date, and End Date for the Approval Delegation you wish to create

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



8

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

Lesson 8: View Team Representatives (Core HR)

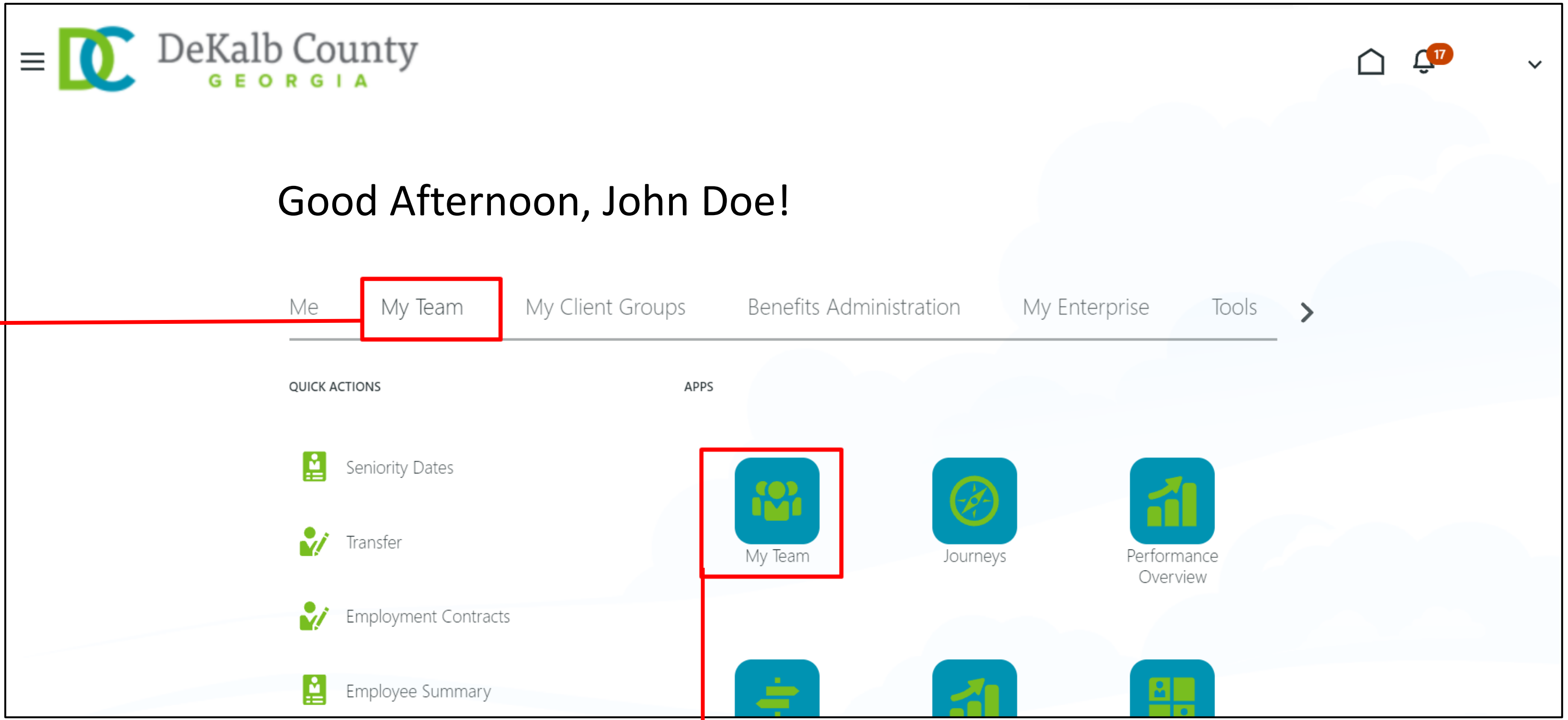
CloudVergent 360

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

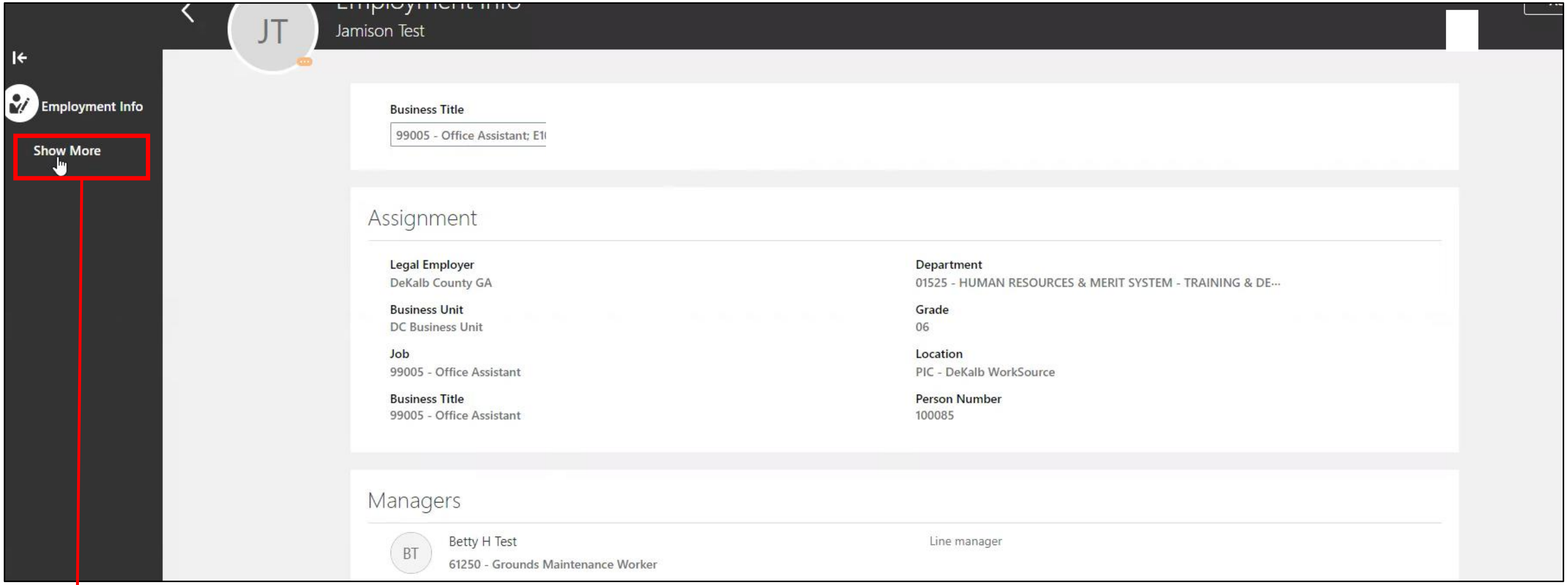
2 Select the **My Team** tile from the Apps section

View Team Representatives

3

Select the **Employee Name link**

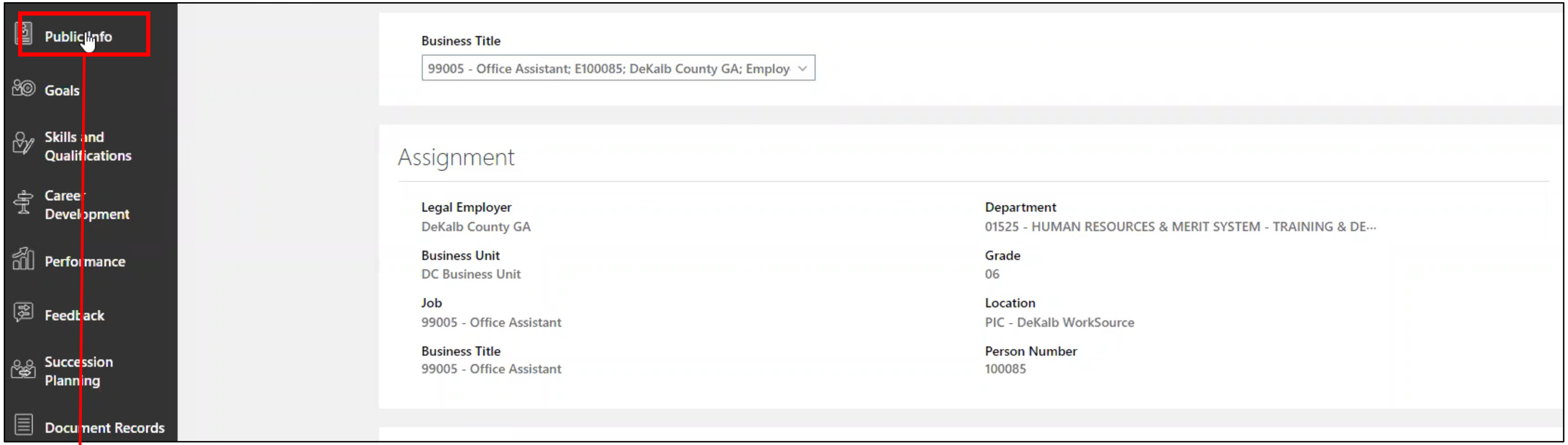
View Team Representatives



4

Select the **Show More** button

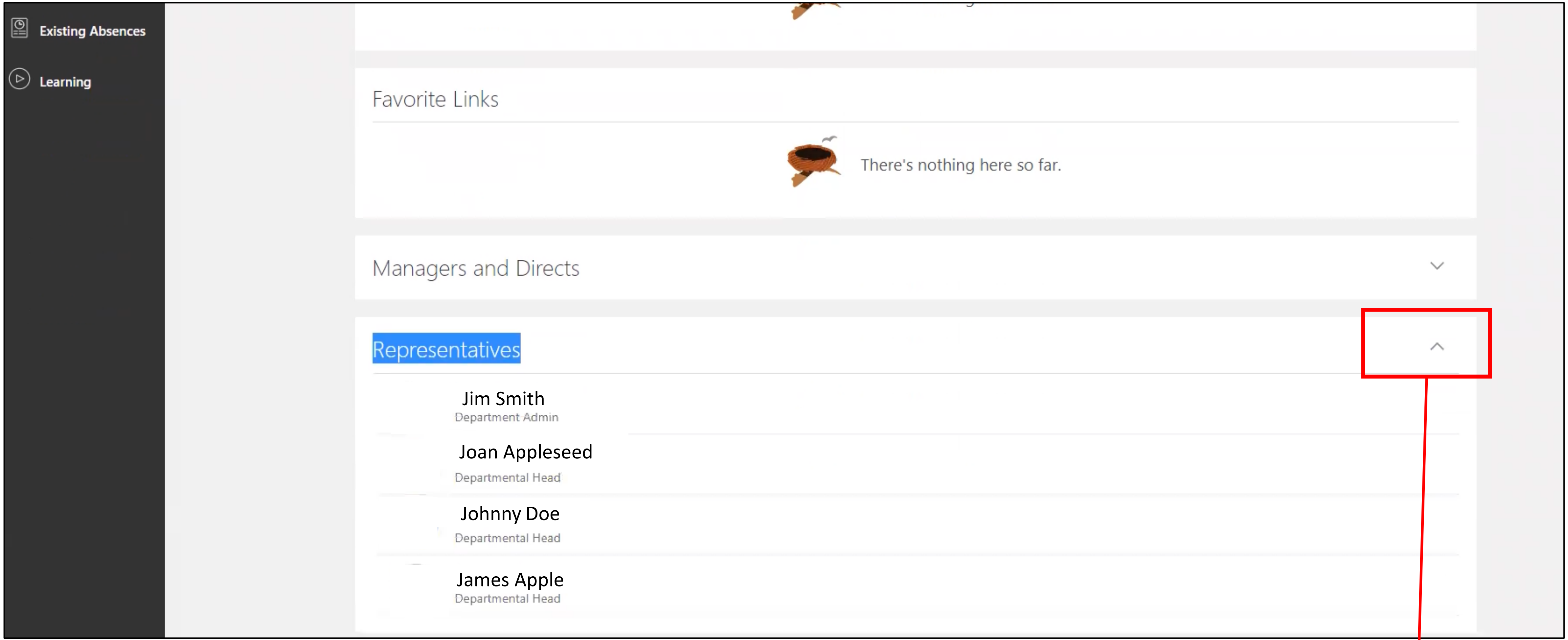
View Team Representatives



5

Select the **Public Info** button

View Team Representatives



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

6

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

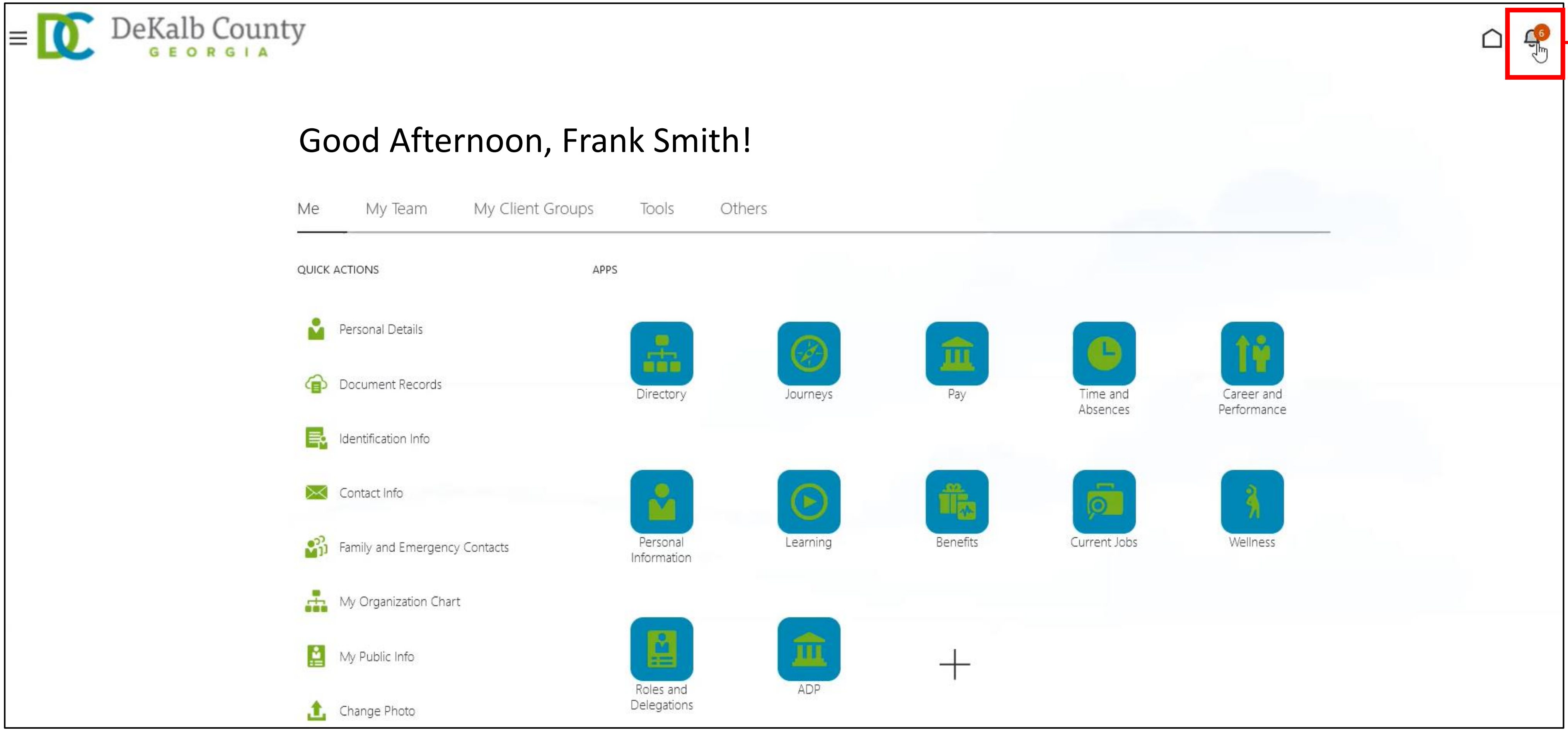
Lesson 9: Approve/Reject Time Off Requests (Absence)

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

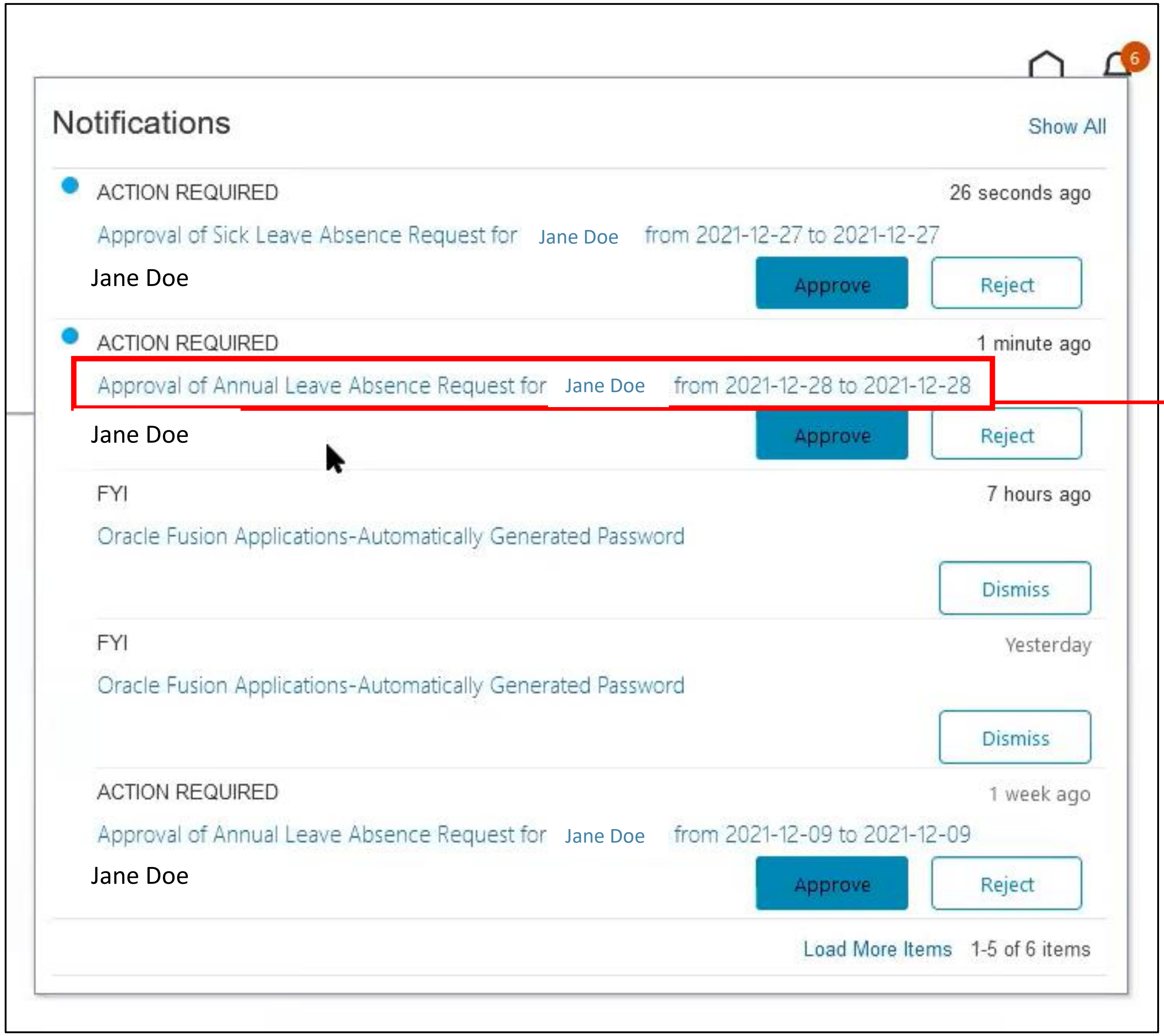
Approve/Reject Time Off Requests



1

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

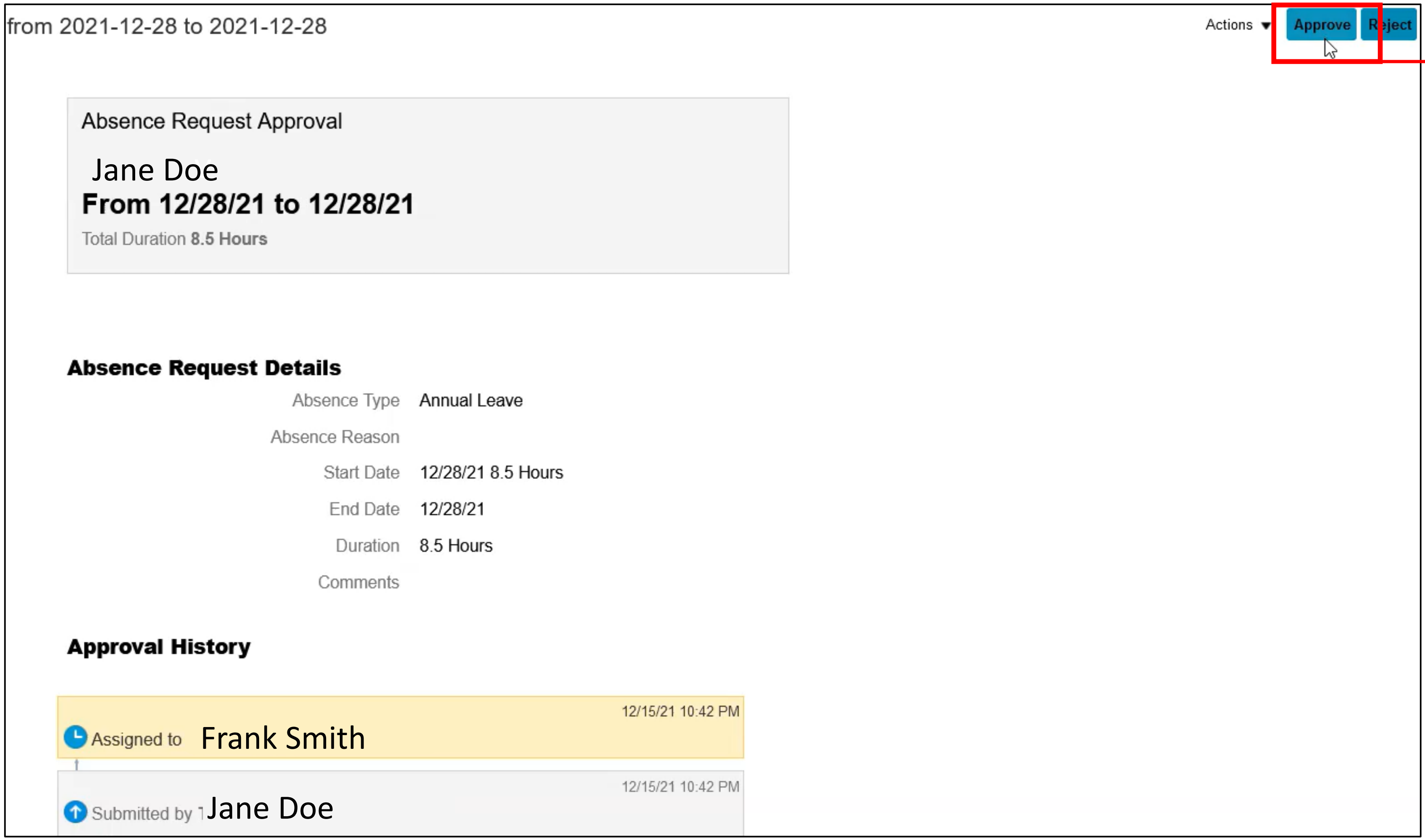
Approve/Reject Time Off Requests



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

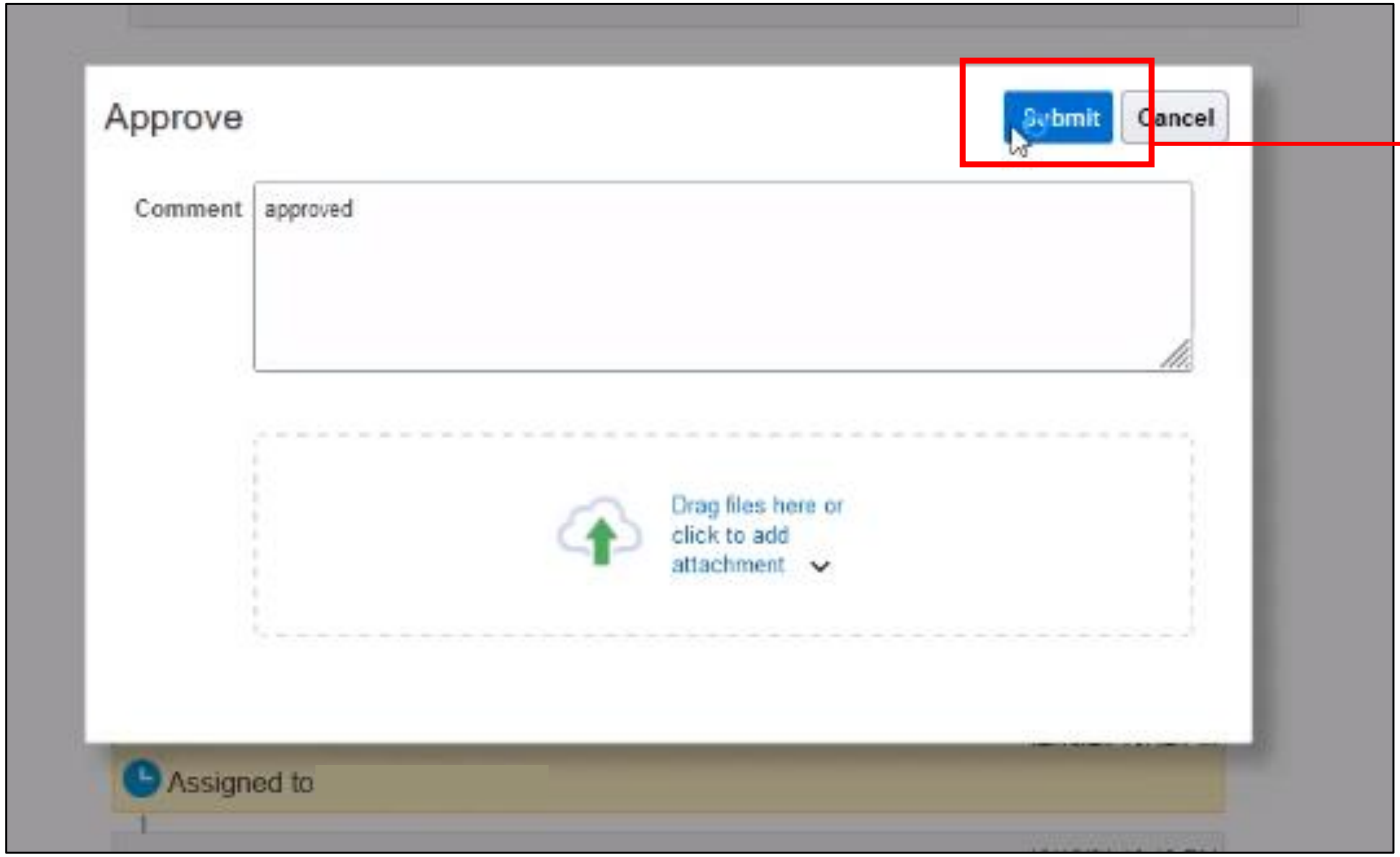
12/15/21 10:42 PM
Assigned to Frank Smith

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

3

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

Approve/Reject Time Off Requests

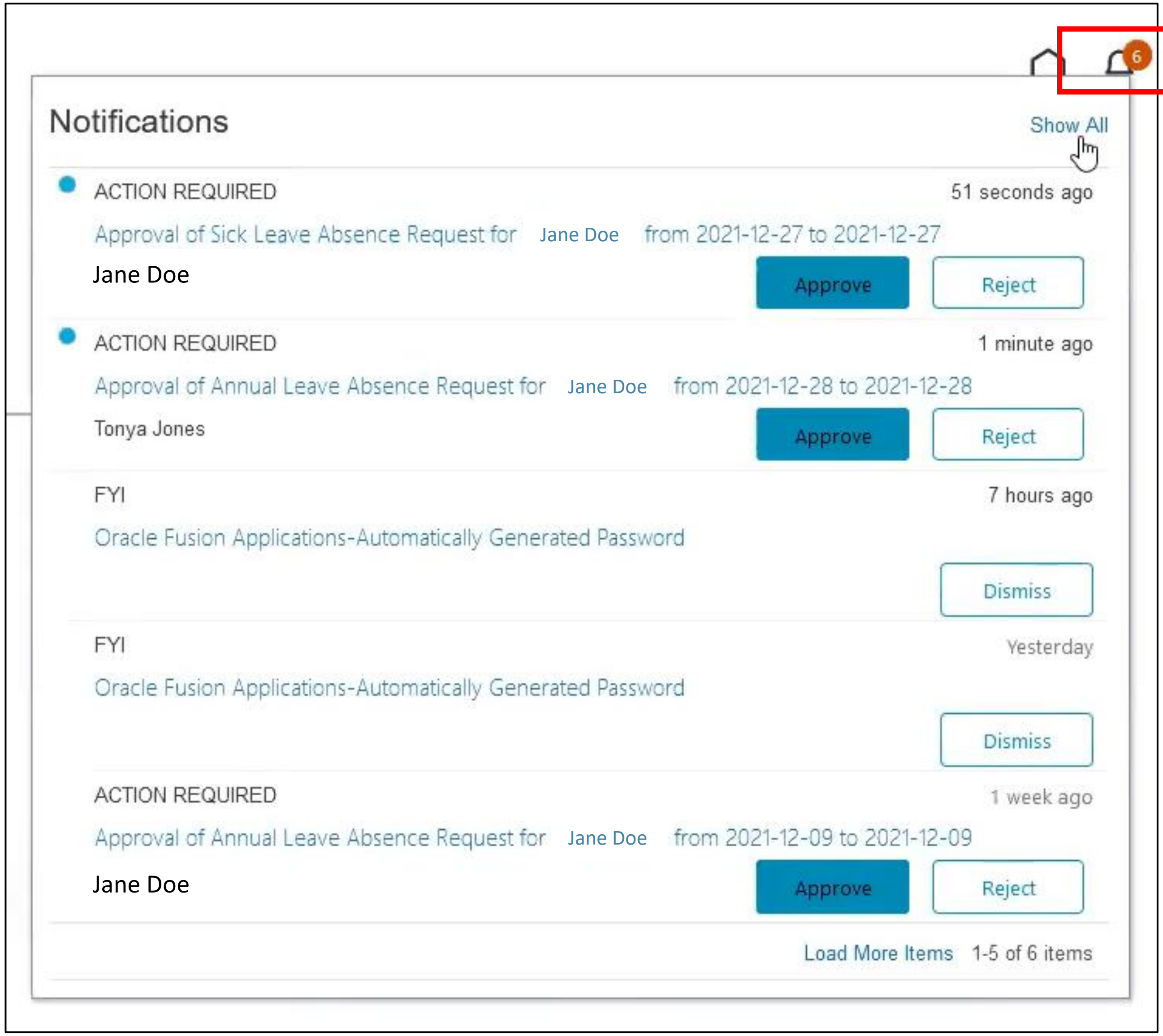


4

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

Approve/Reject Time Off Requests

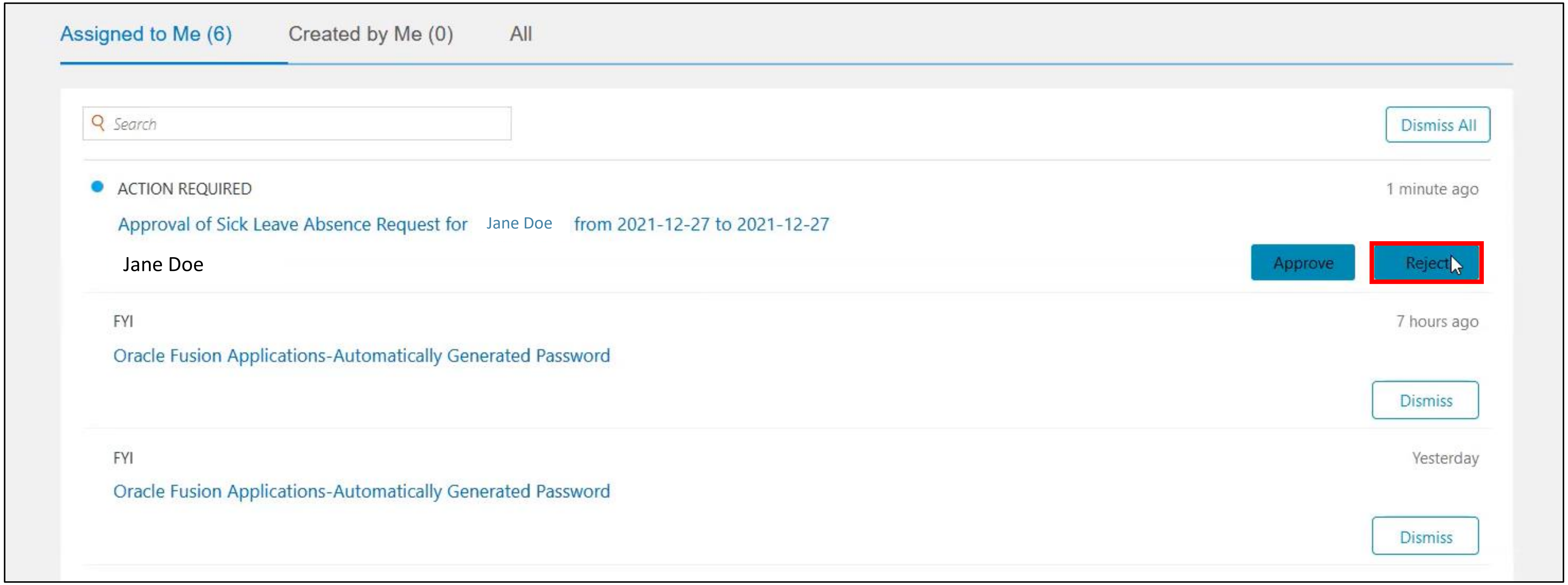
CloudVergent 360



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



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

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

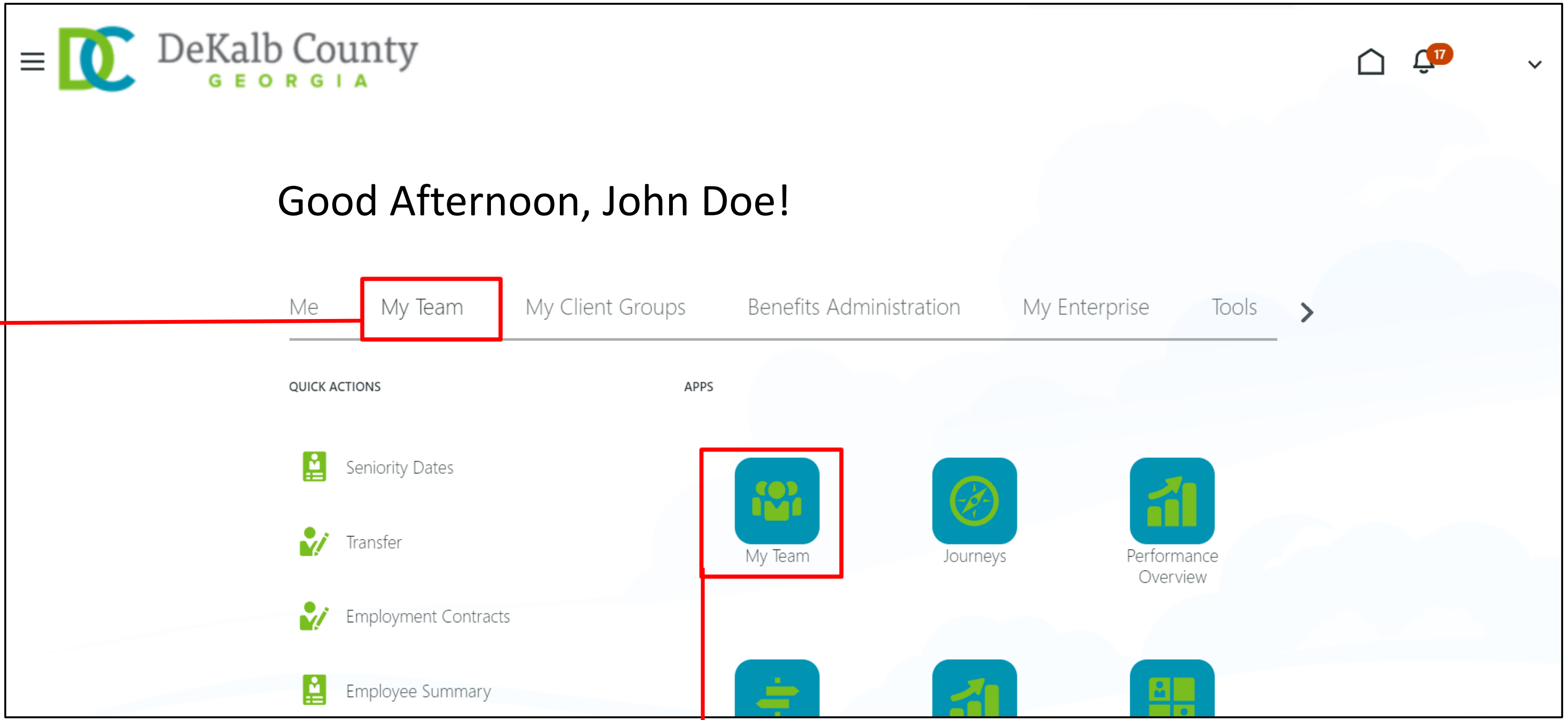
CloudVergent 360

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



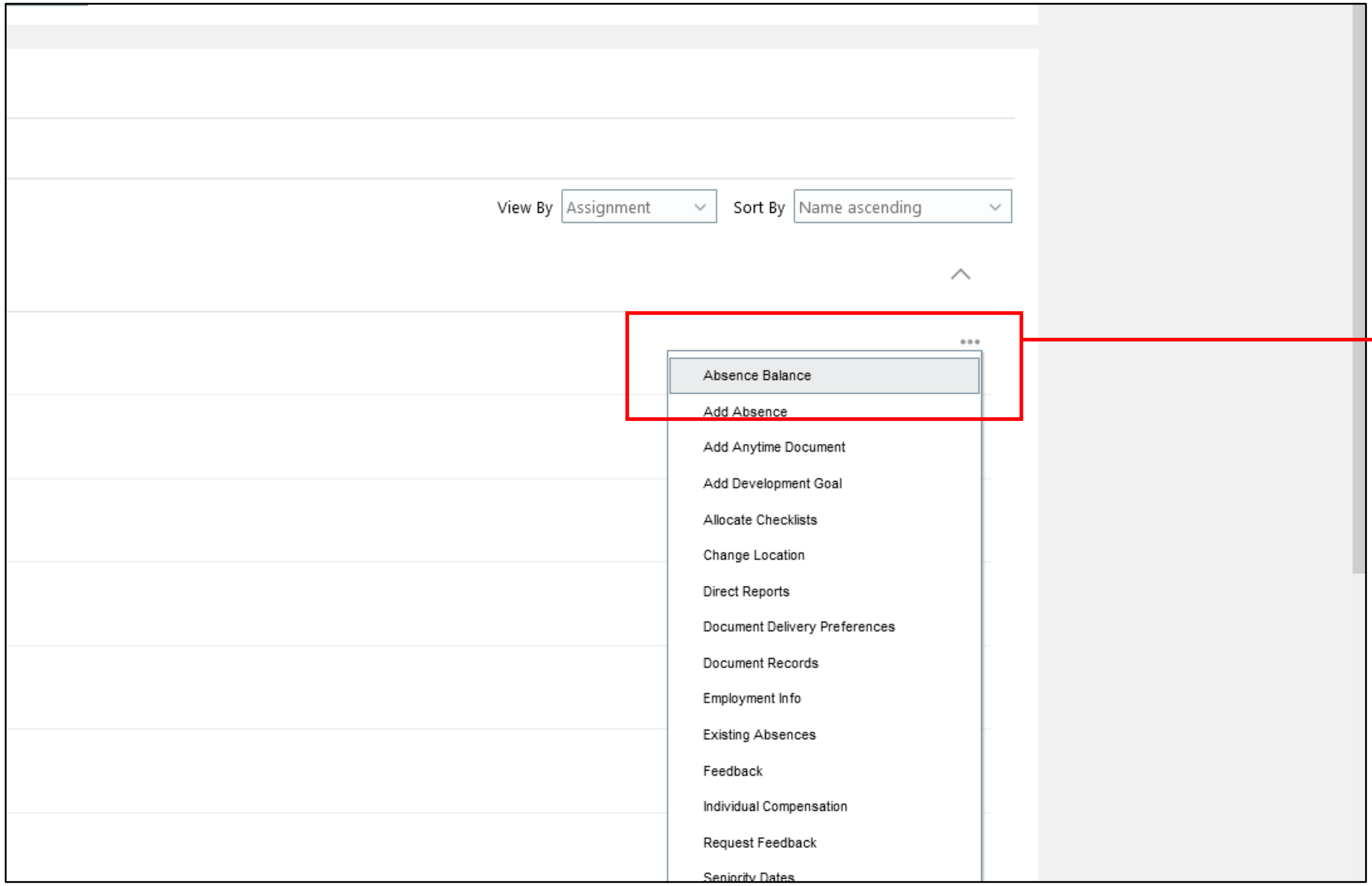
1

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

2

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

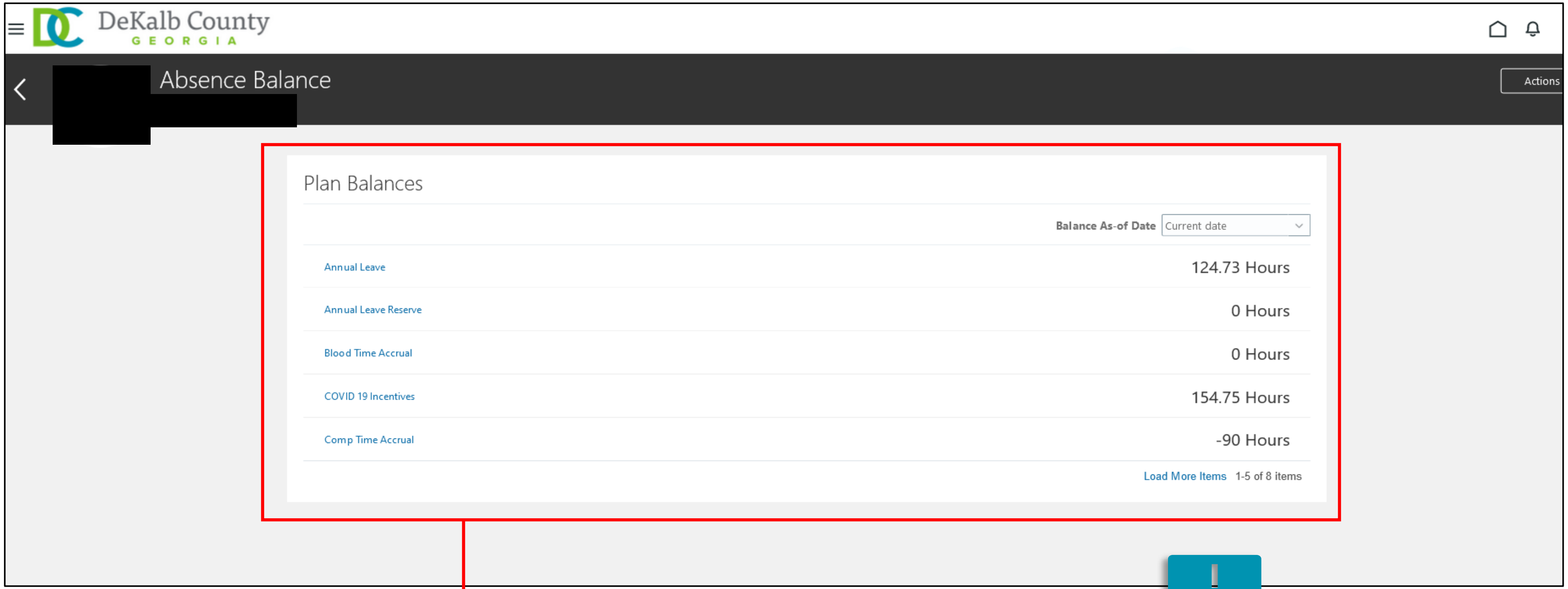
View an Employee's Existing Leave Balances



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



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

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

Lesson Objective:

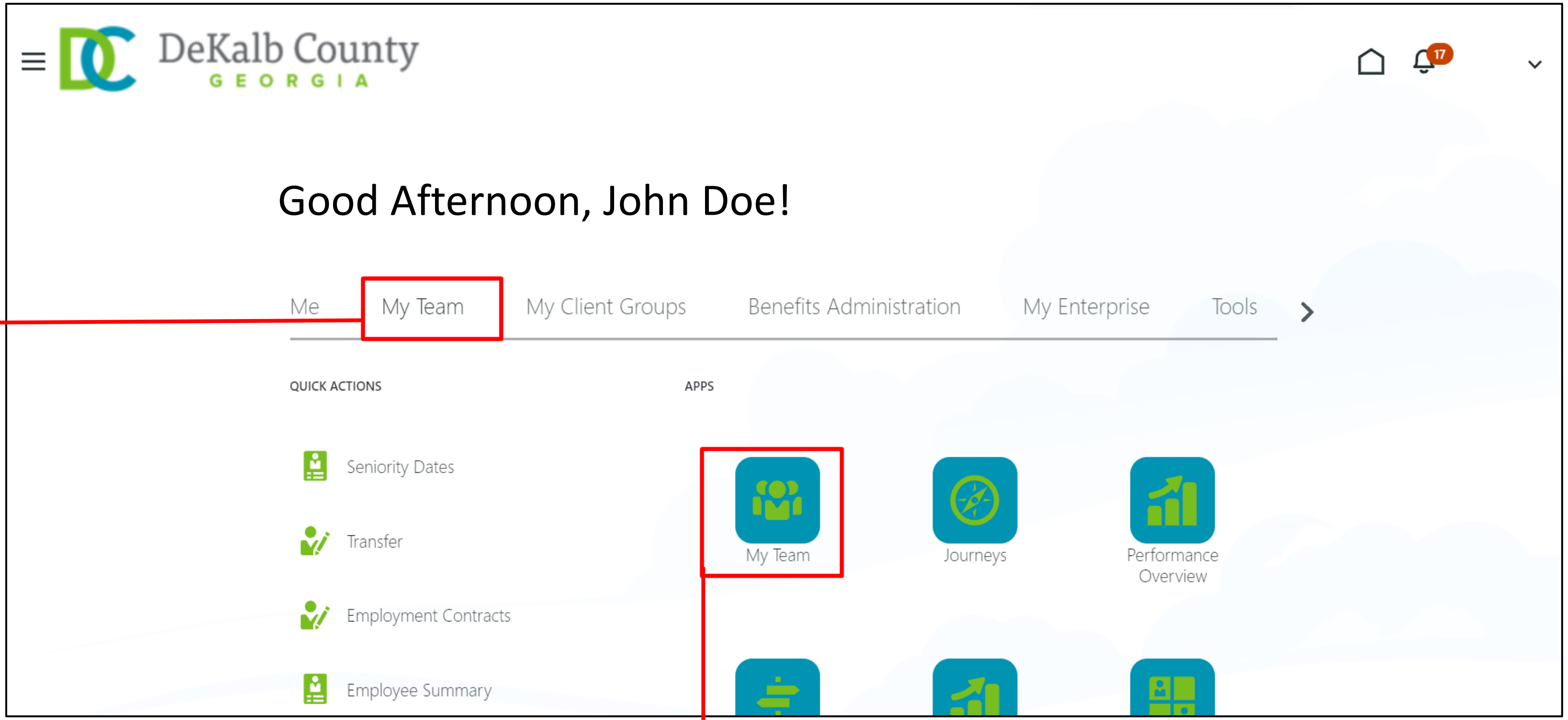
Upon the completion of the Request Absence on Behalf of an Employee Lesson, you will be able to:

Objective
• Request Absence on Behalf of an Employee

Request Absence on Behalf of an Employee

1

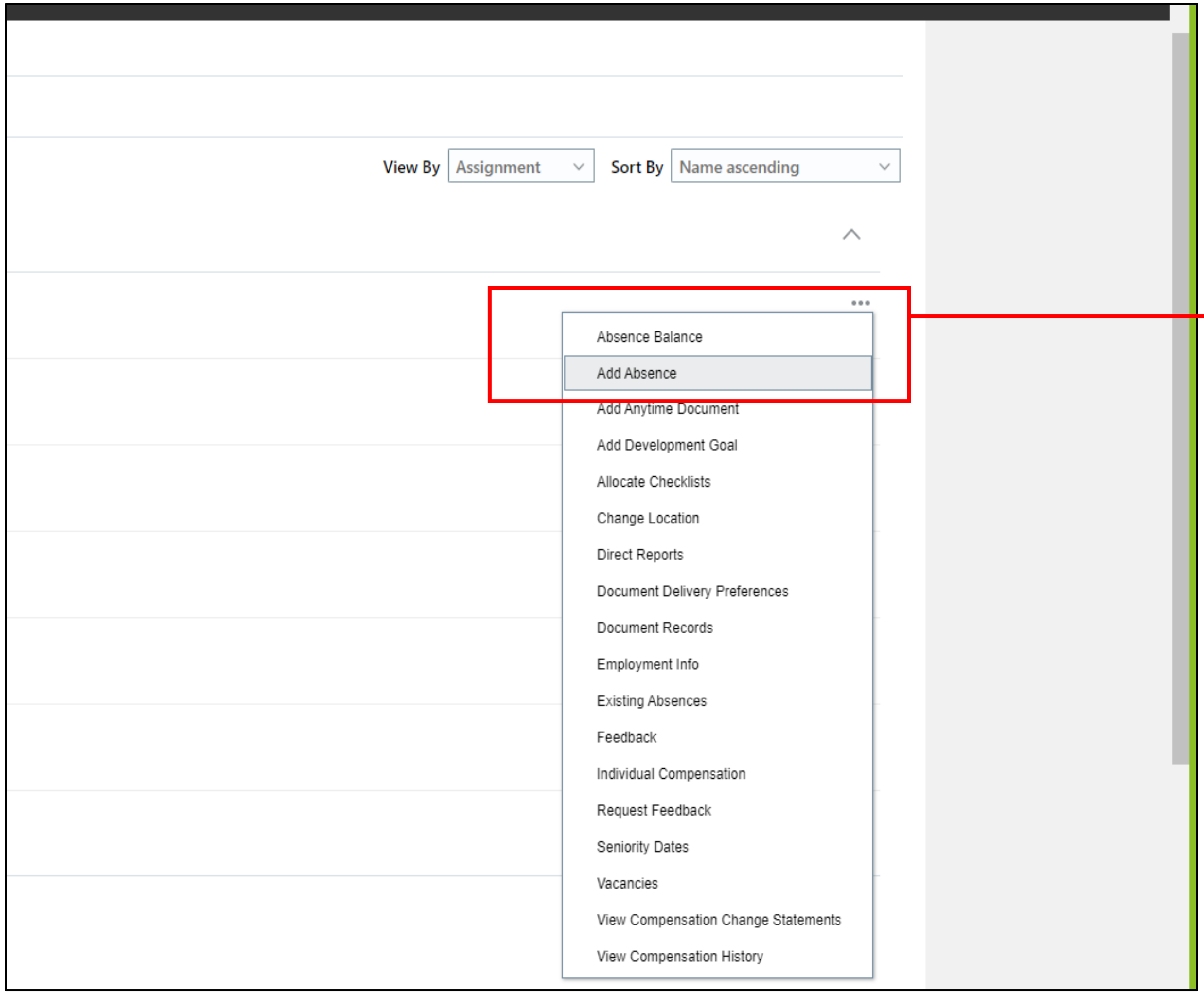
Select the **My Team** tab from the CV360 homepage



2

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

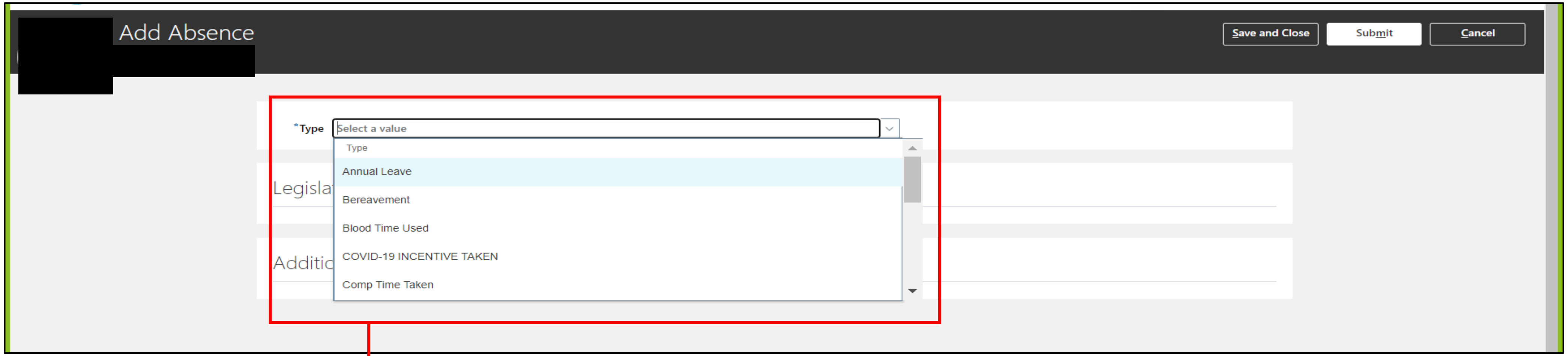
Request Absence on Behalf of an Employee



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



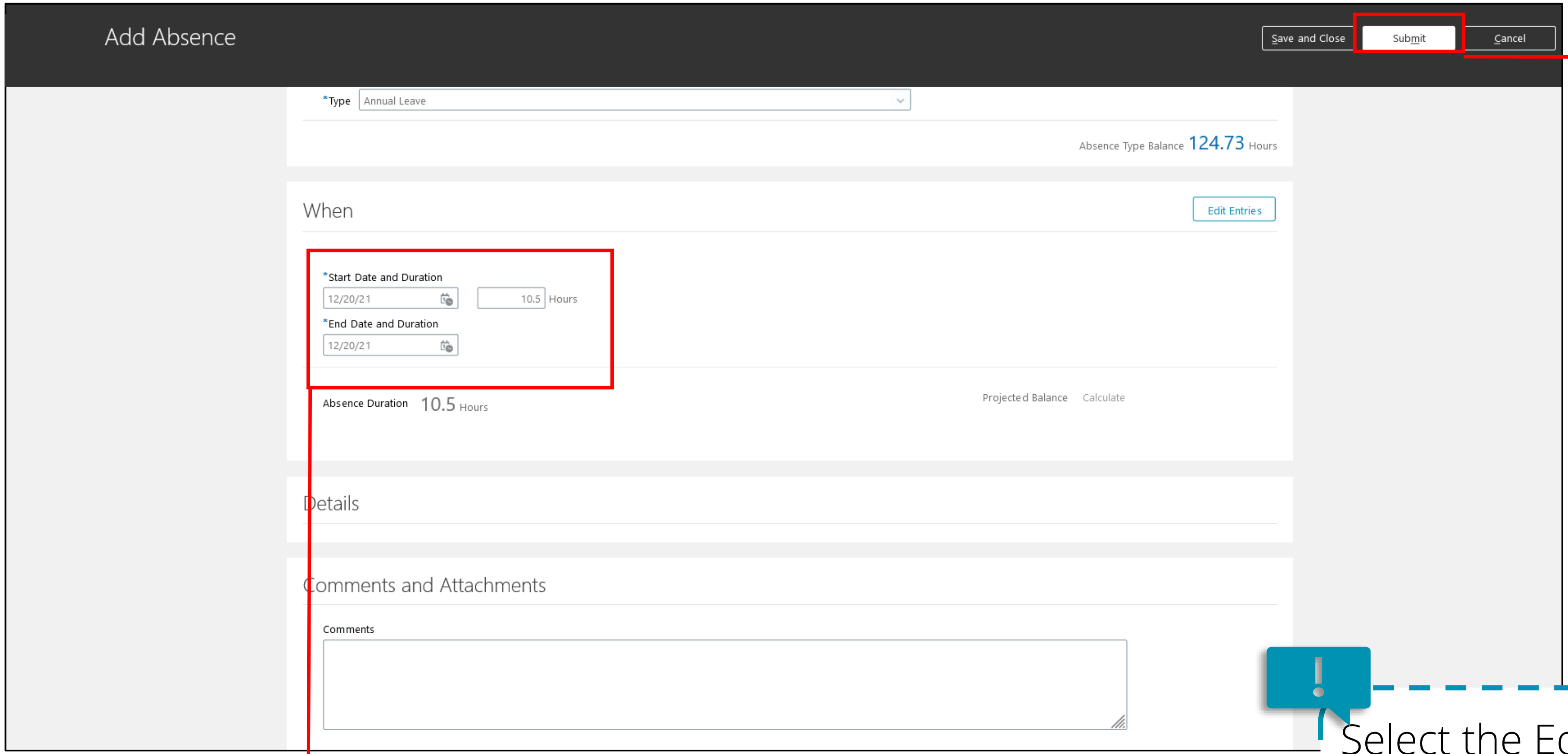
4

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



6

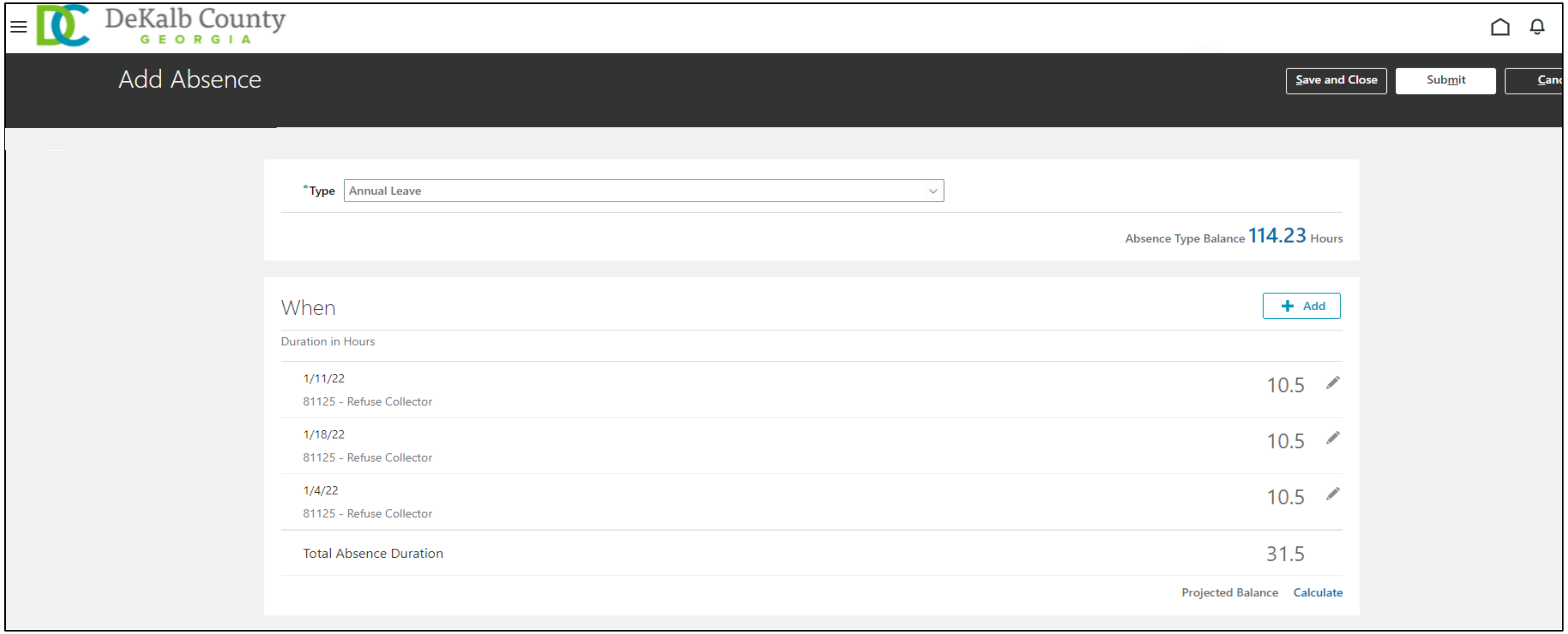
Select the **Submit** button to submit the request

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



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

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

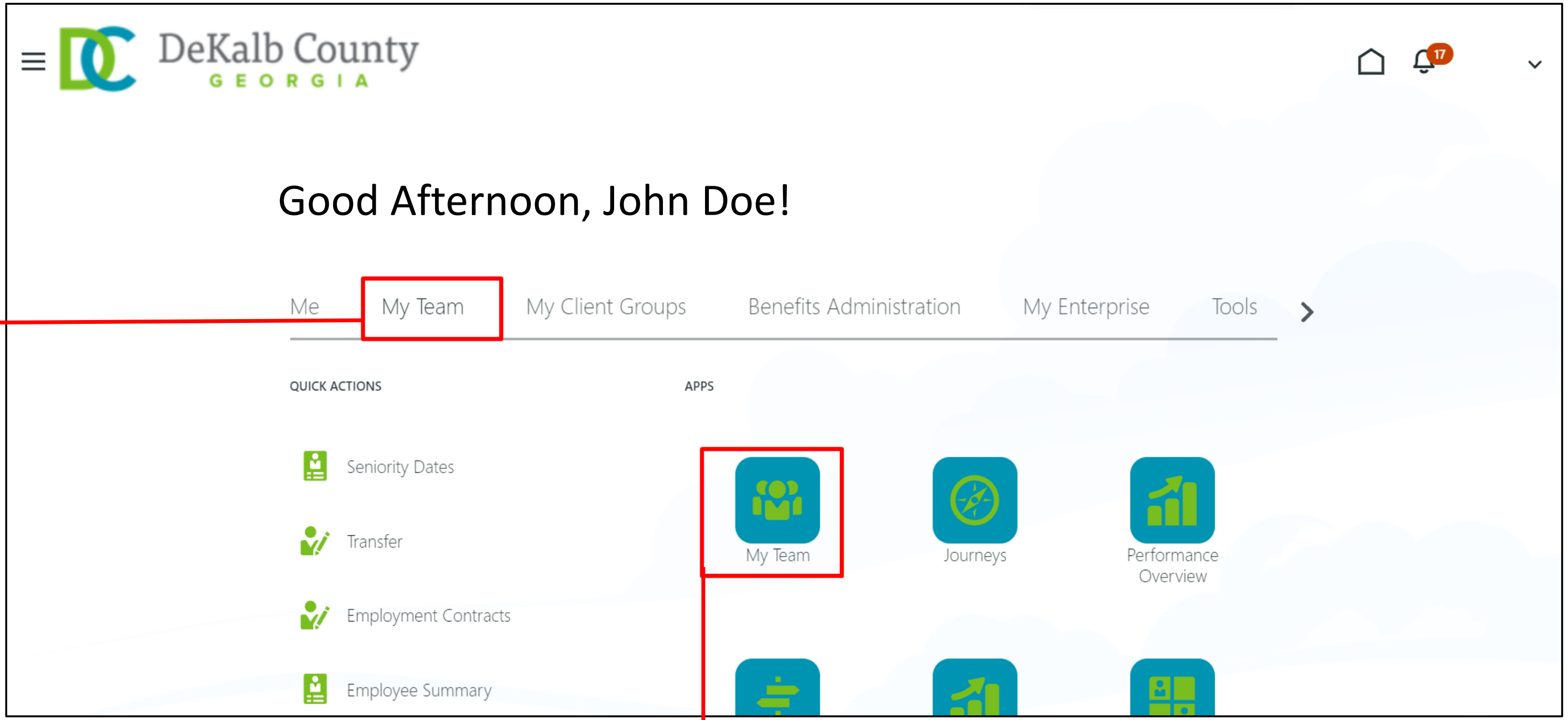
CloudVergent 360

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



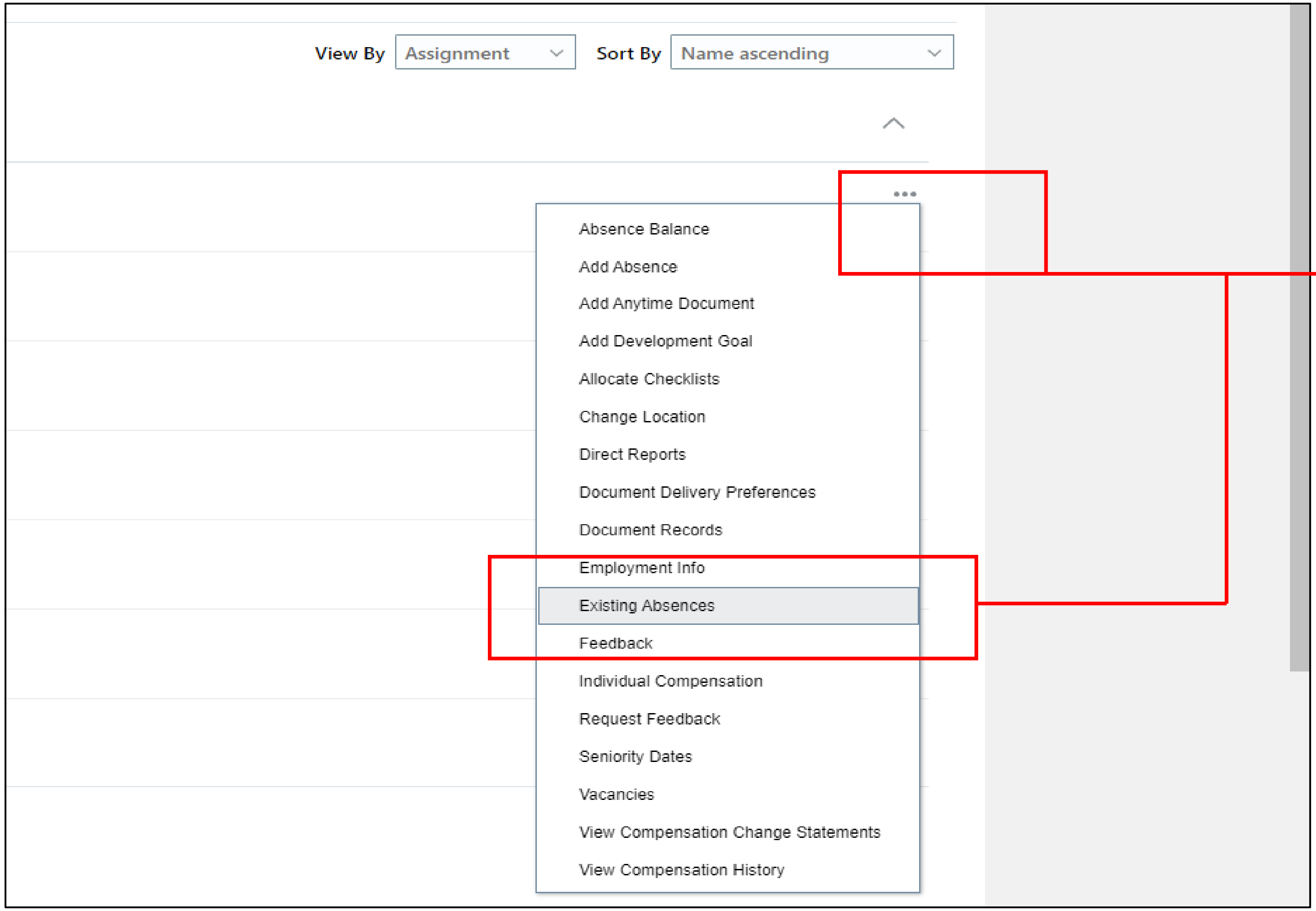
1

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

2

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

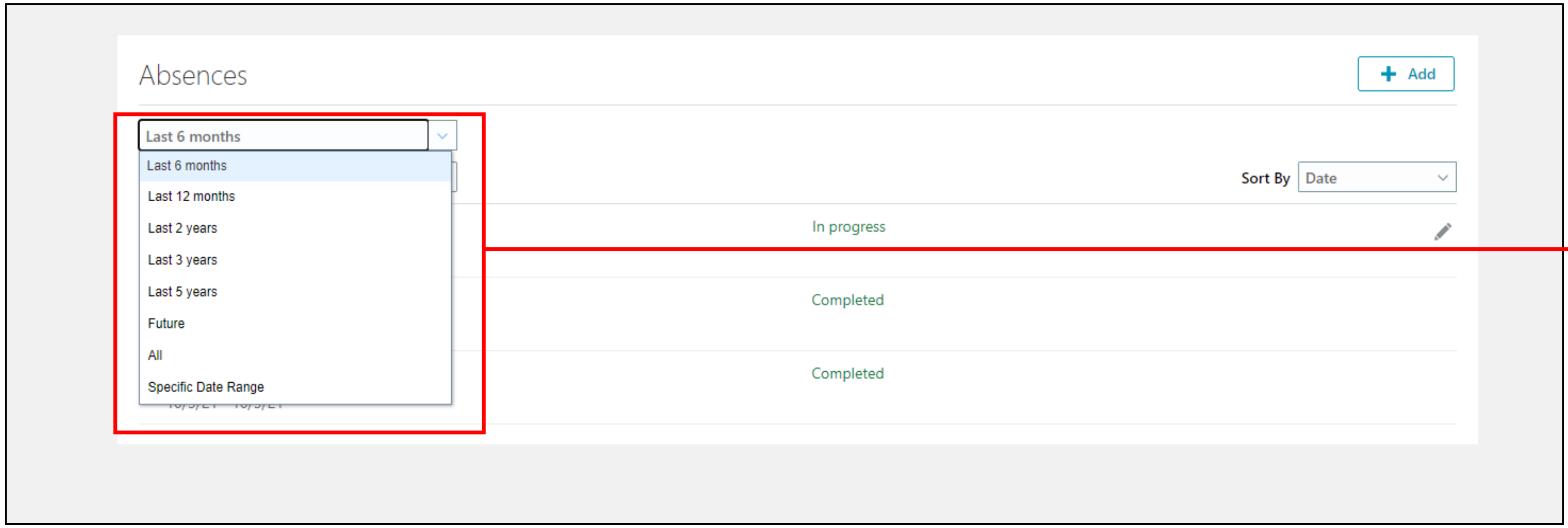
View an Employee's Existing Absences



3

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

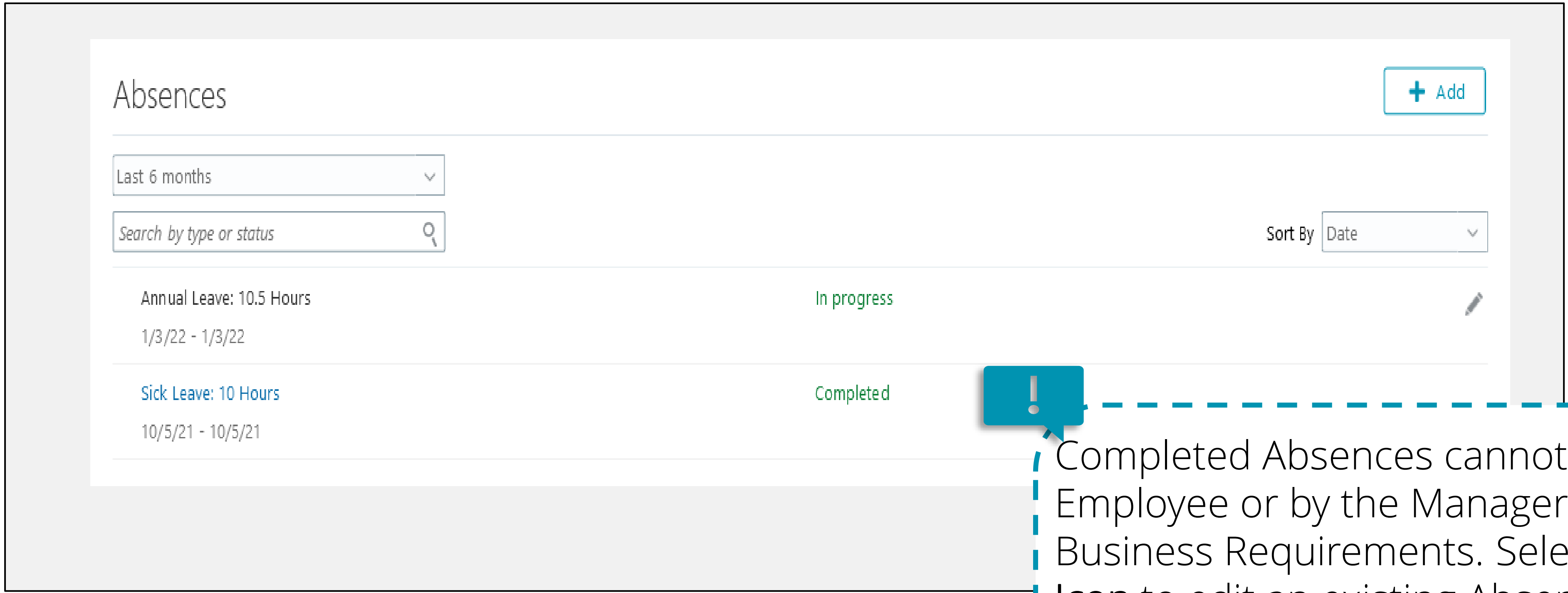
View an Employee’s Existing Absences



4

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

View an Employee's Existing Absences



!

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

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

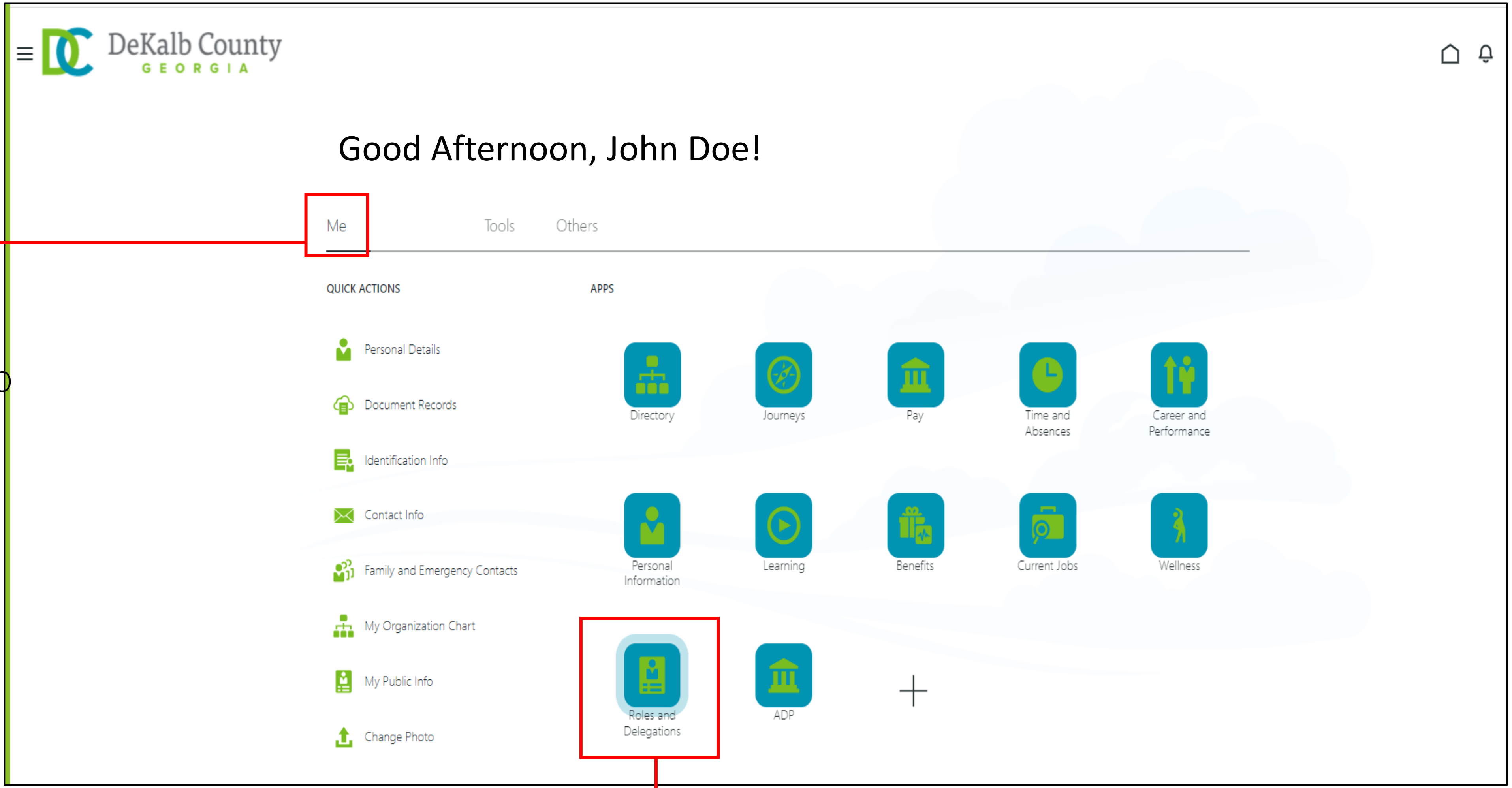
CloudVergent 360

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



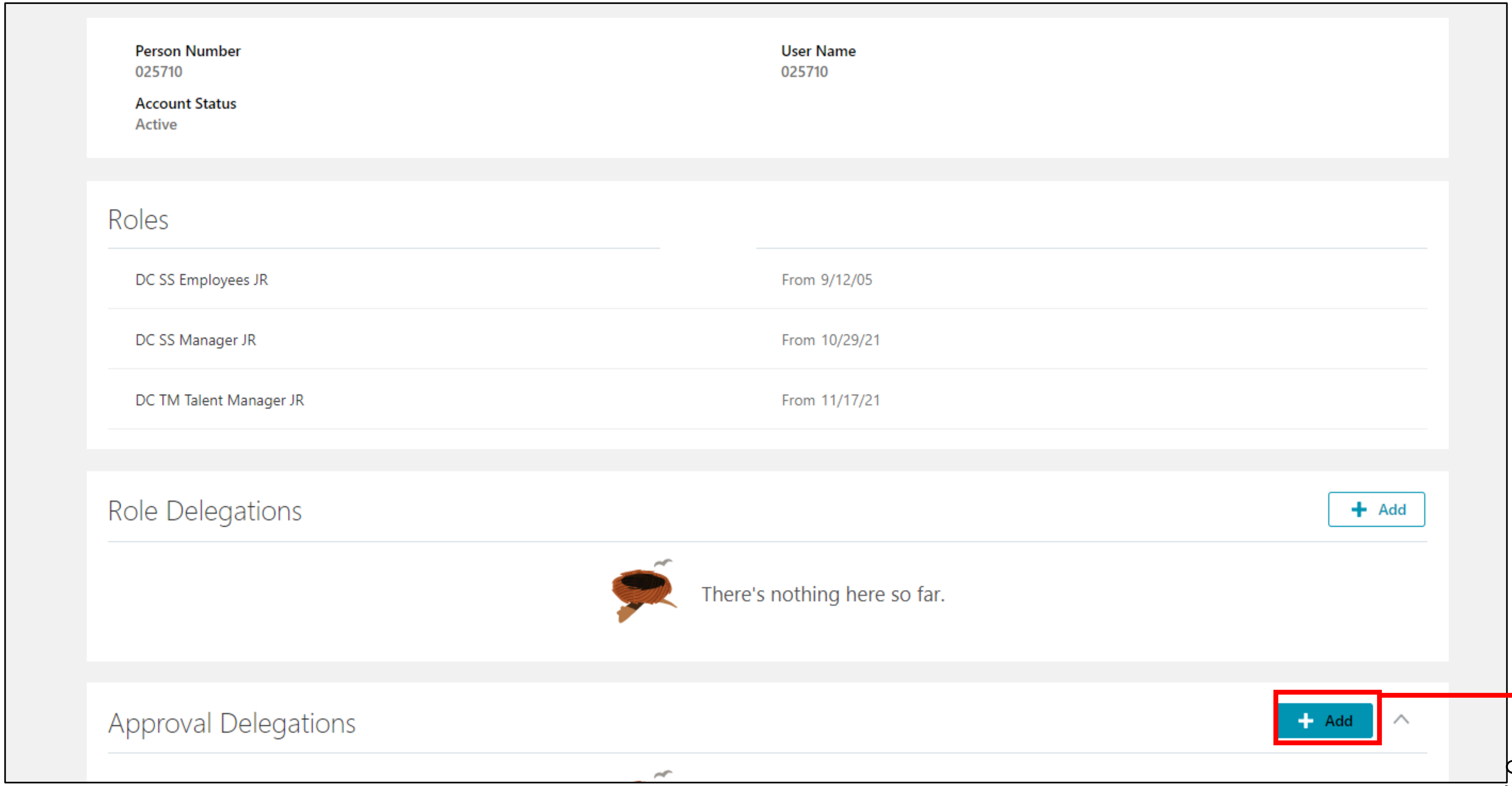
1

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

2

Select the **Roles and Delegations** tile

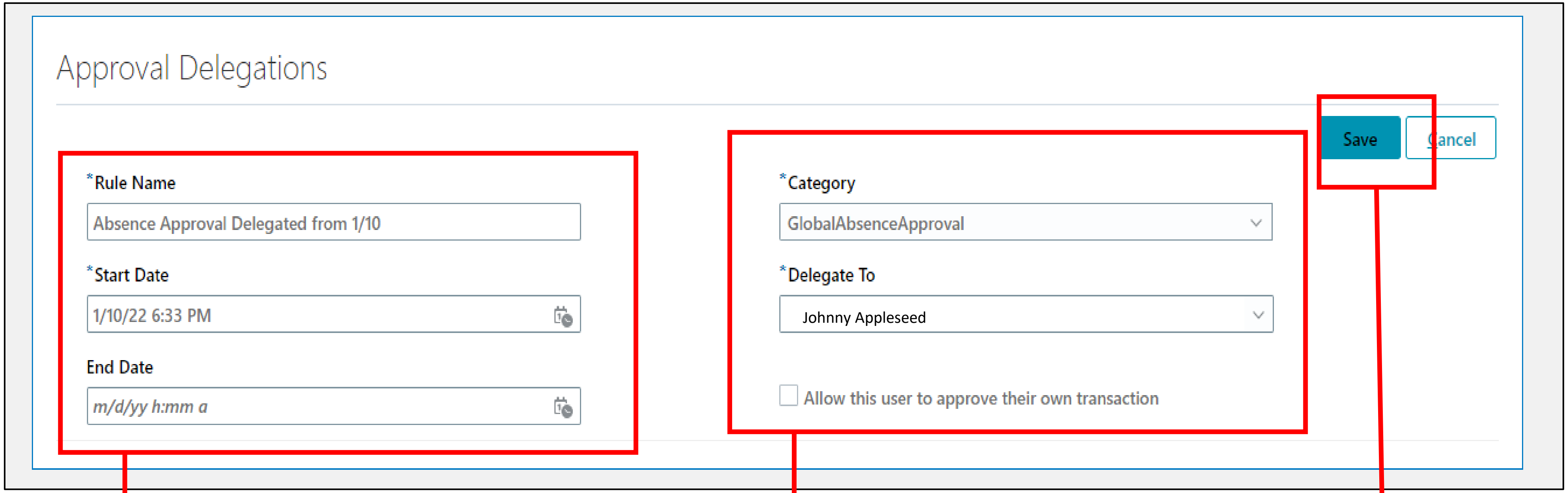
Create a Delegation for Absence Approvals



3

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

Create a Delegation for Absence Approvals

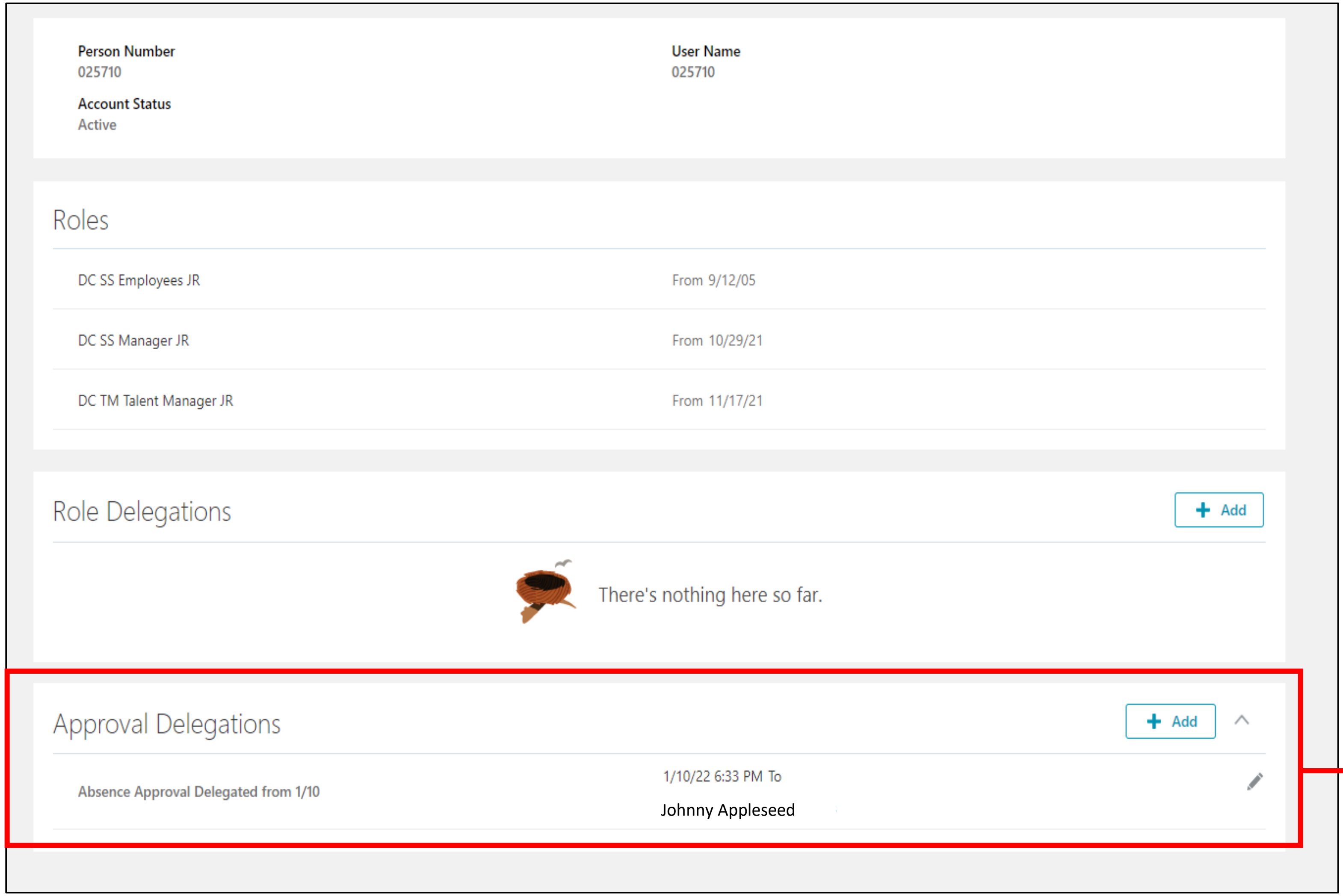


4 Key in a Rule Name, and select a Start Date and an End Date for the Approval Delegation

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



7

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

Lesson 14: Recommend Learnings (Learning)

CloudVergent 360

Lesson Objective:

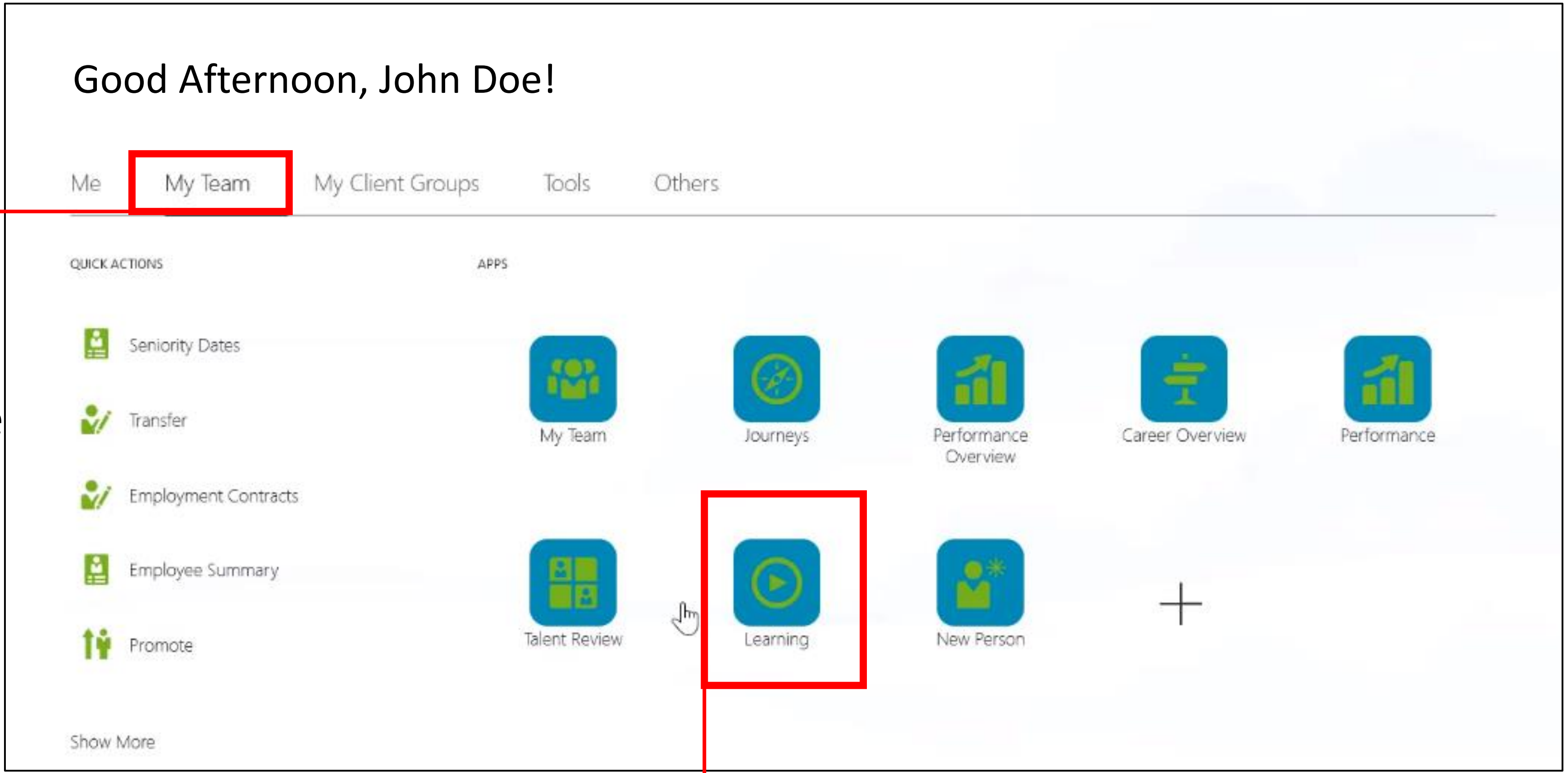
Upon the completion of the Recommend Learnings lesson, you will be able to:

Objective
• Recommend Learning Items to specific Direct and Indirect Reports

Recommend and Assign Learnings

1

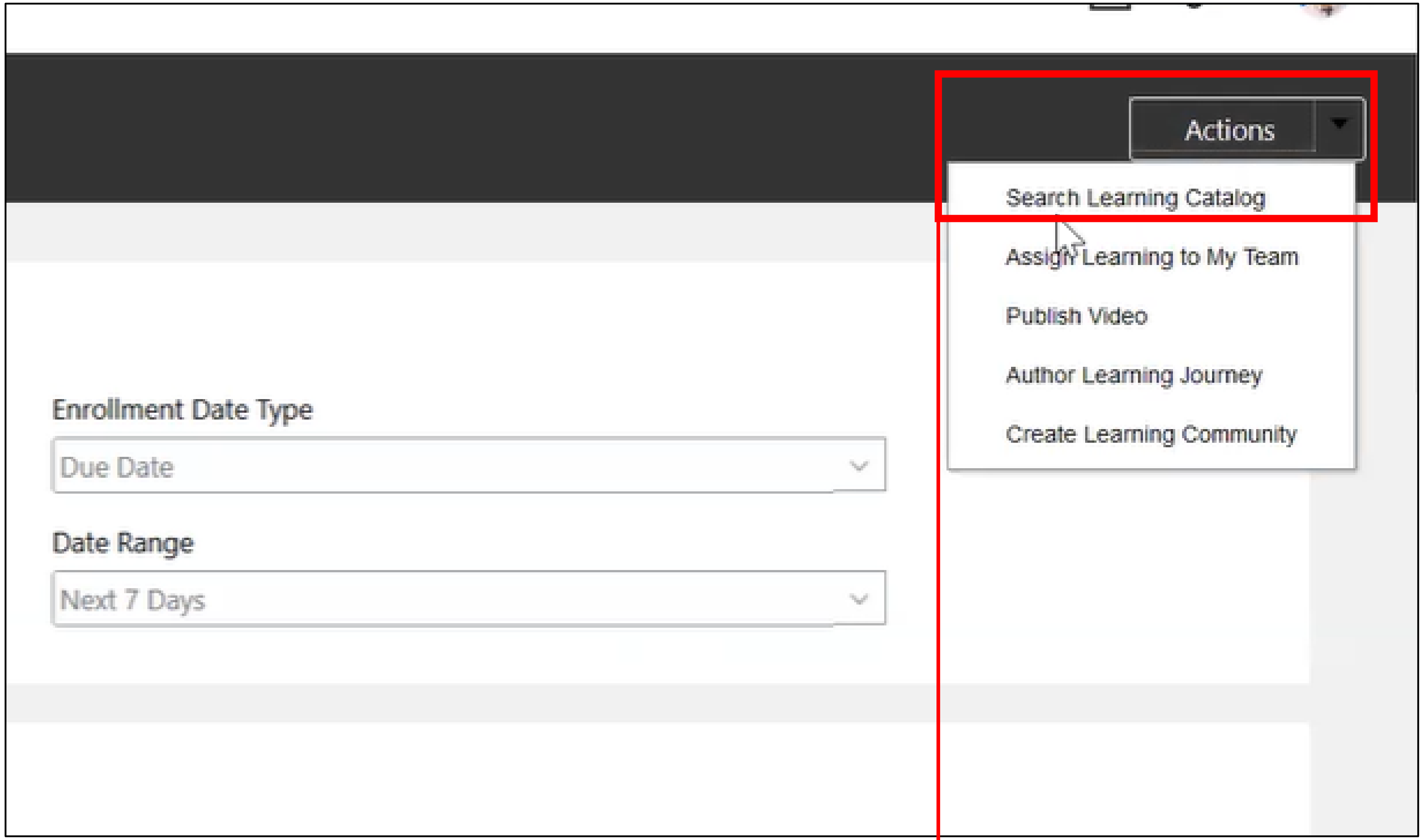
Select the **My Team** tab from the CV360 homepage



2

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

Recommend and Assign Learnings

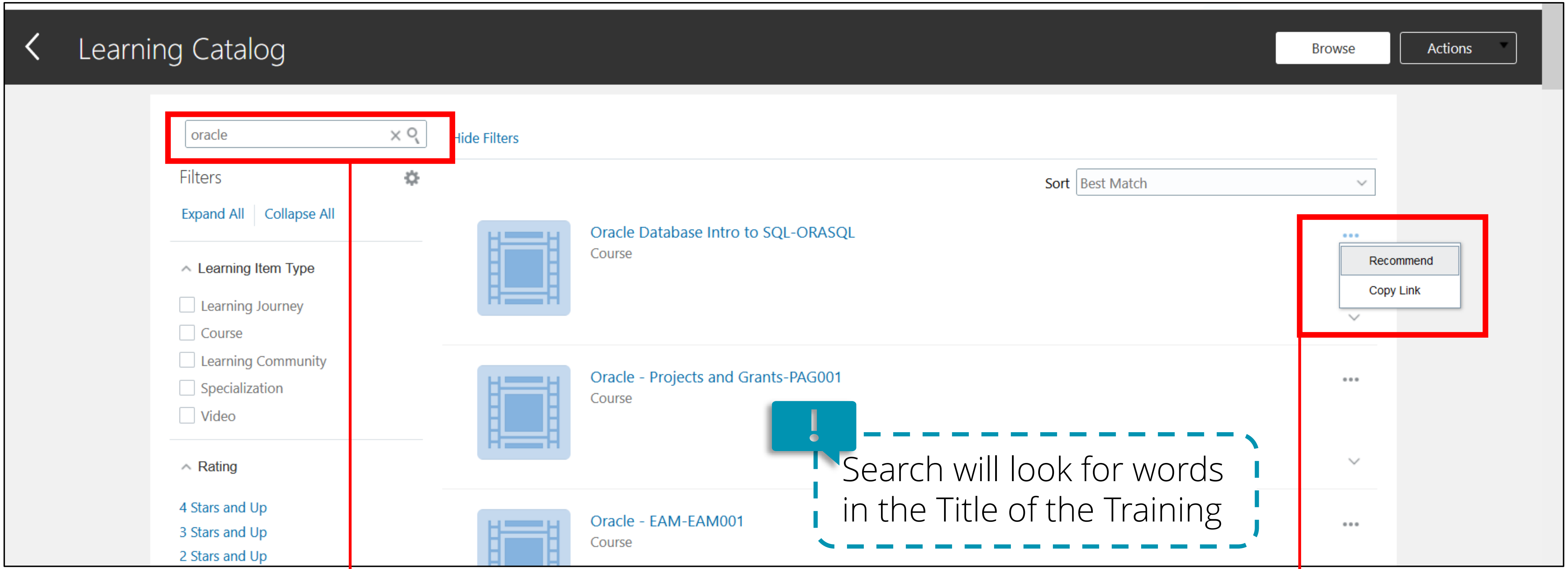


3

Select Search Learning Catalog from the Actions drop-down list

Recommend and Assign Learnings

CloudVergent 360



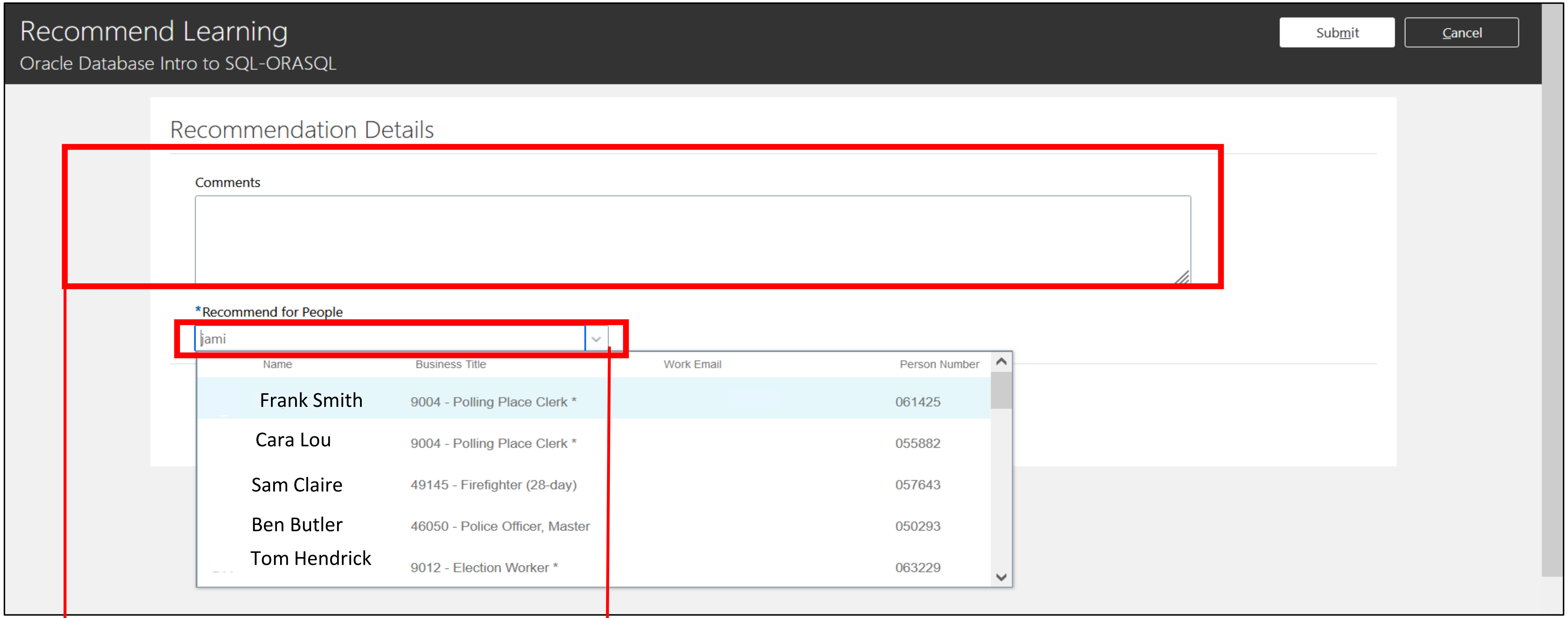
4

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

5

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

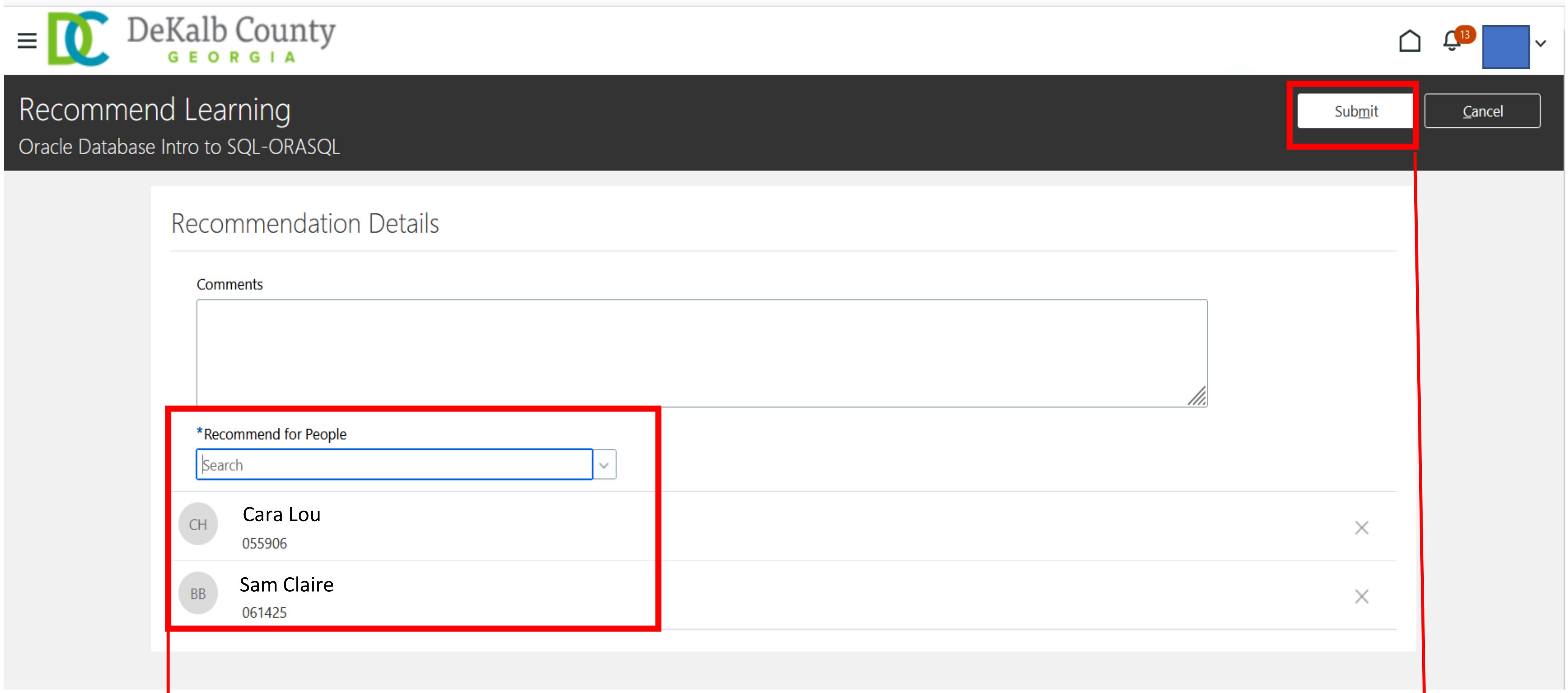
Recommend and Assign Learnings



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

Lesson 15: Assign Learnings (Learning)

CloudVergent 360

Lesson Objective:

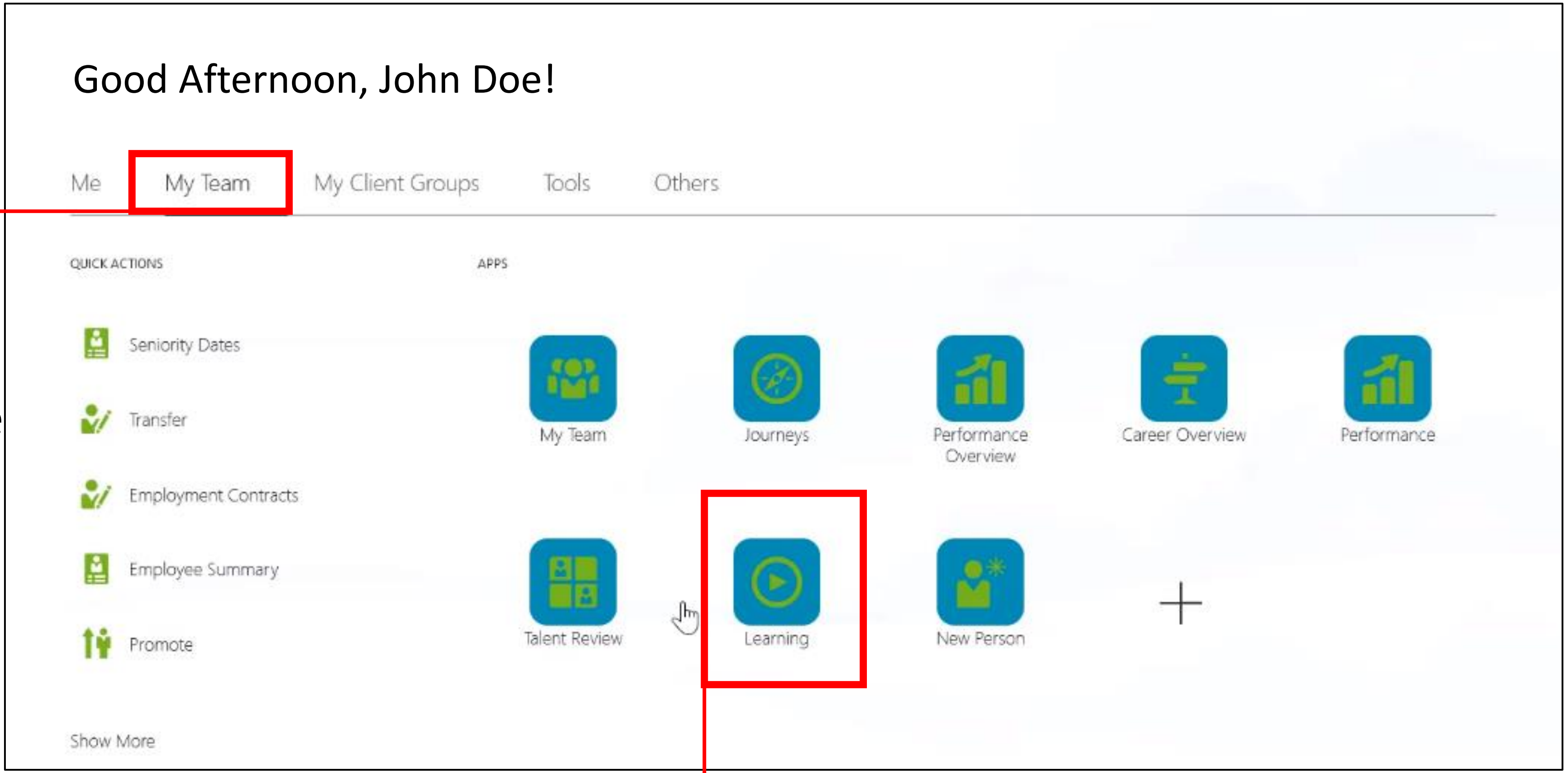
Upon the completion of the Assign Learnings lesson, you will be able to:

Objective
• Assign Learning to Direct and Indirect Reports

Recommend and Assign Learnings

1

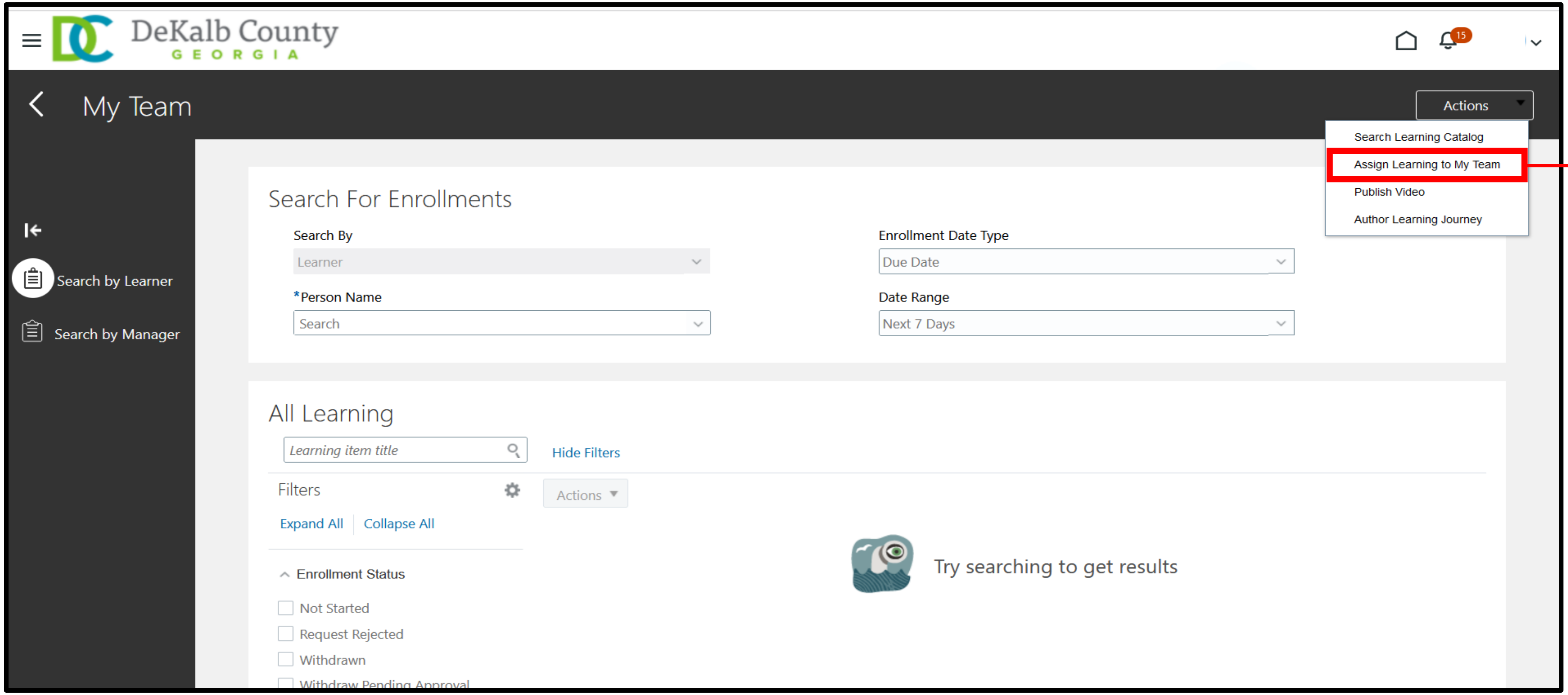
Select the **My Team** tab from the CV360 homepage



2

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

Assign Learnings



3

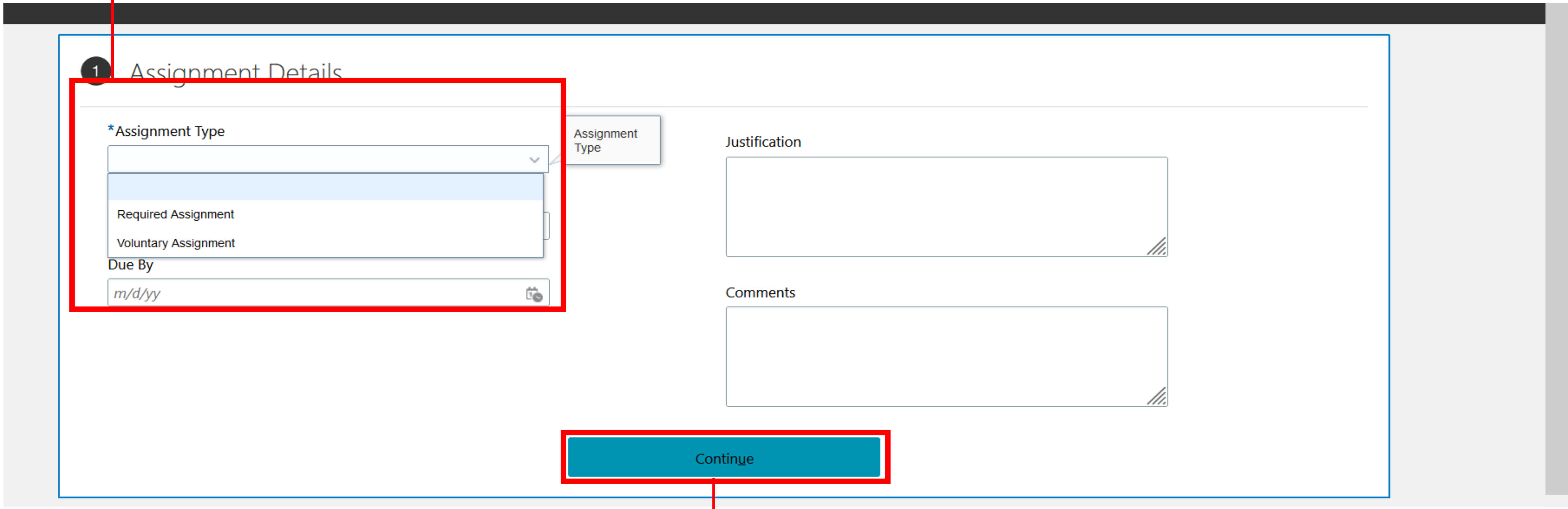
Select **Assign Learning to My Team** from the **Actions** drop-down list

!

This begins the process of assigning Learning to Direct Reports

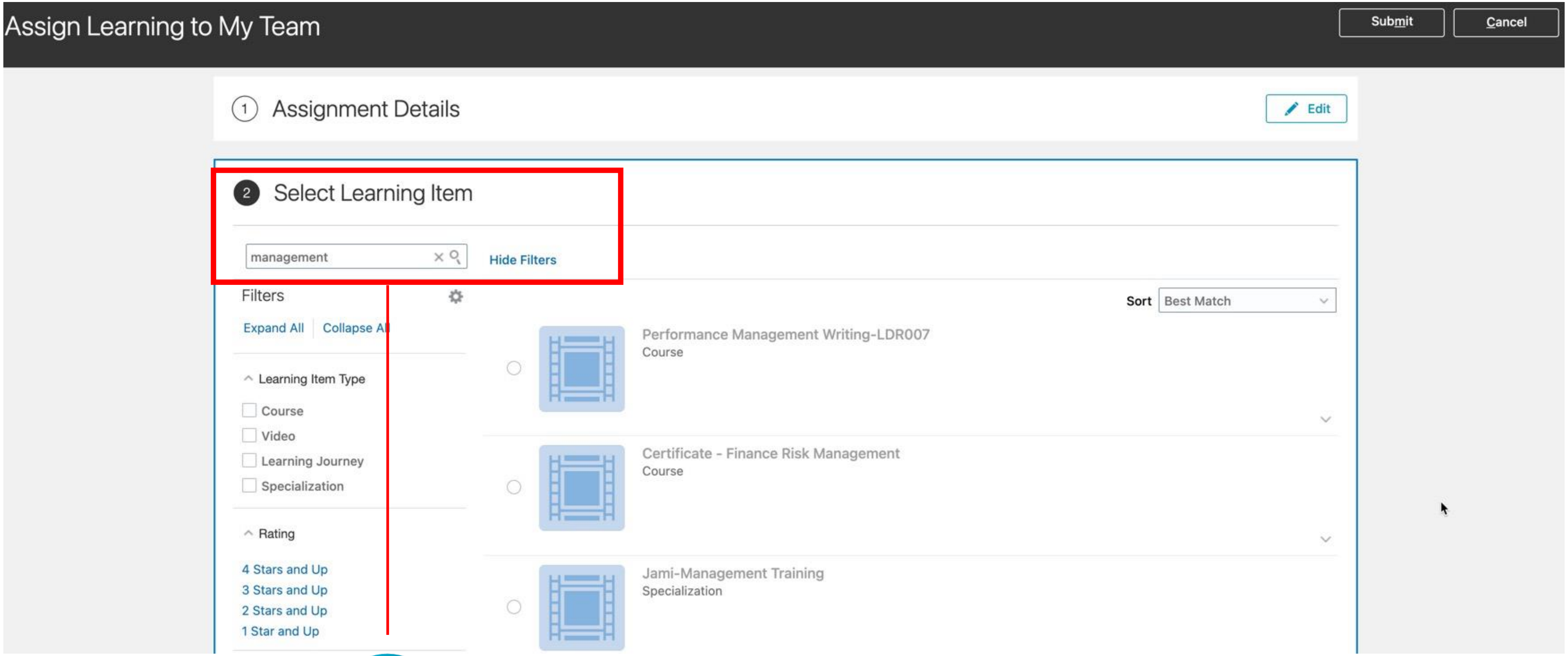
Recommend and Assign Learnings

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



5 Select the **Continue** button

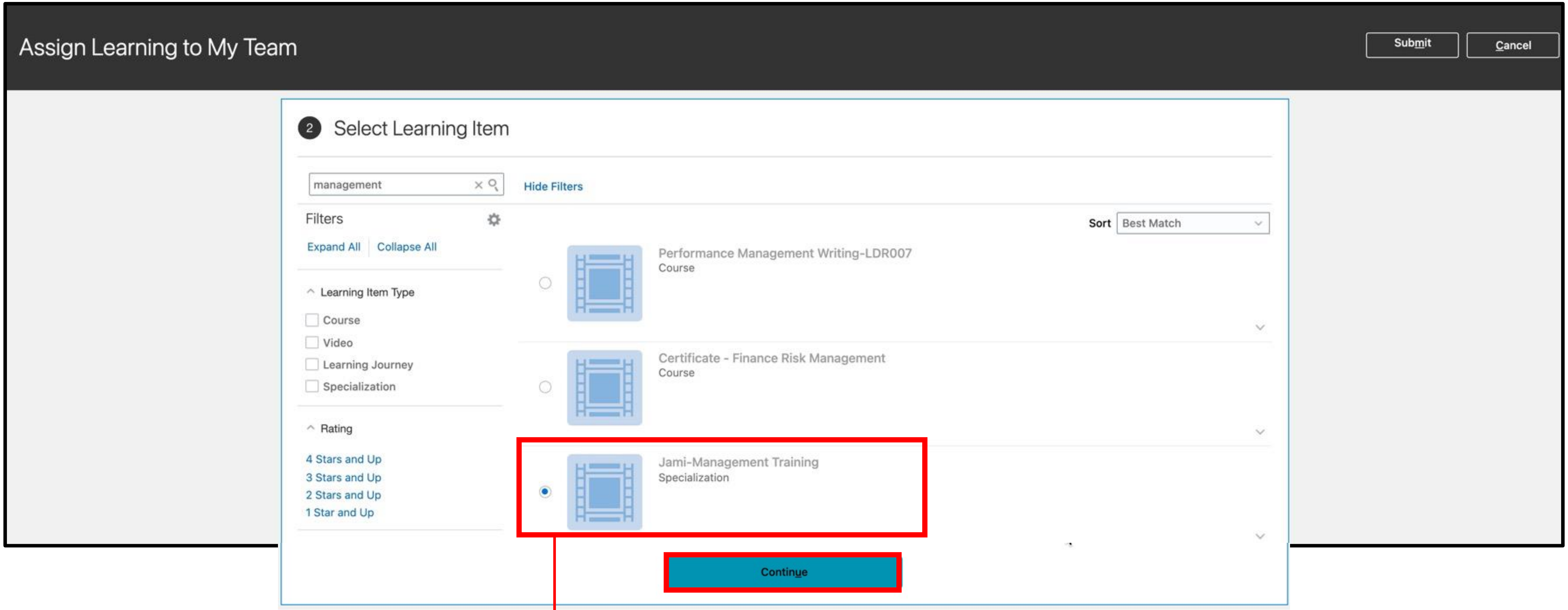
Recommend and Assign Learnings



13

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

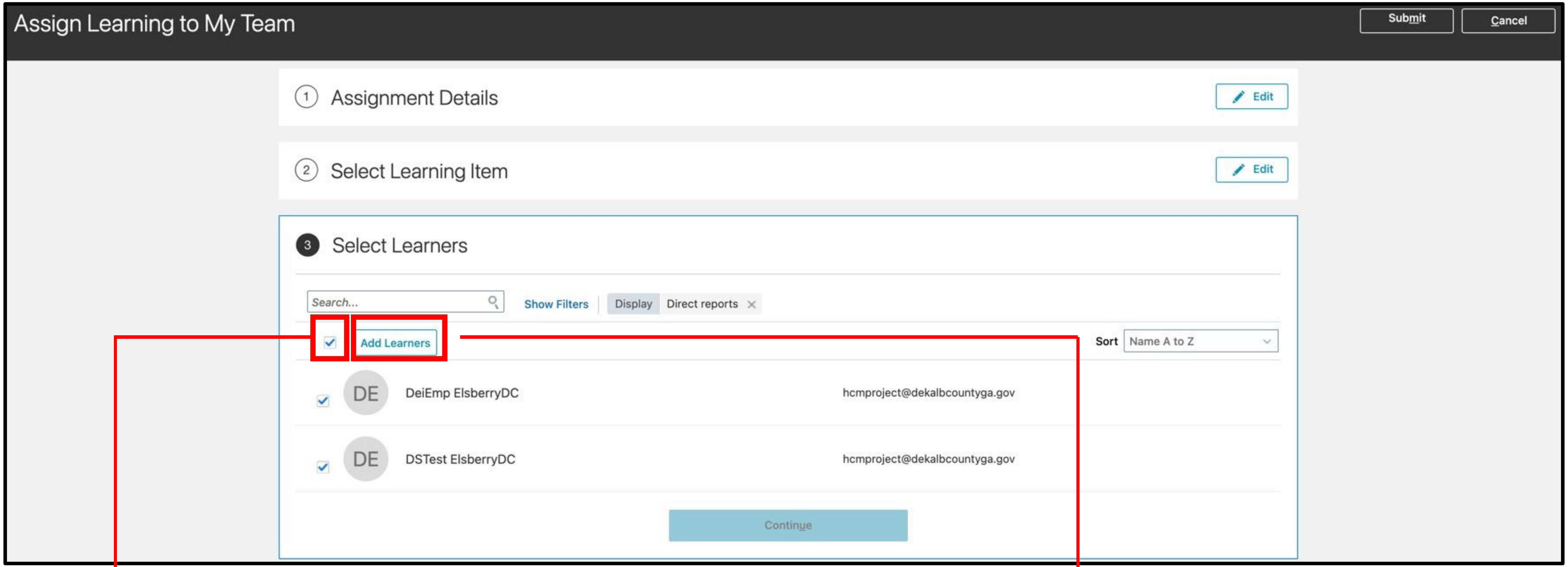
Recommend and Assign Learnings



14

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

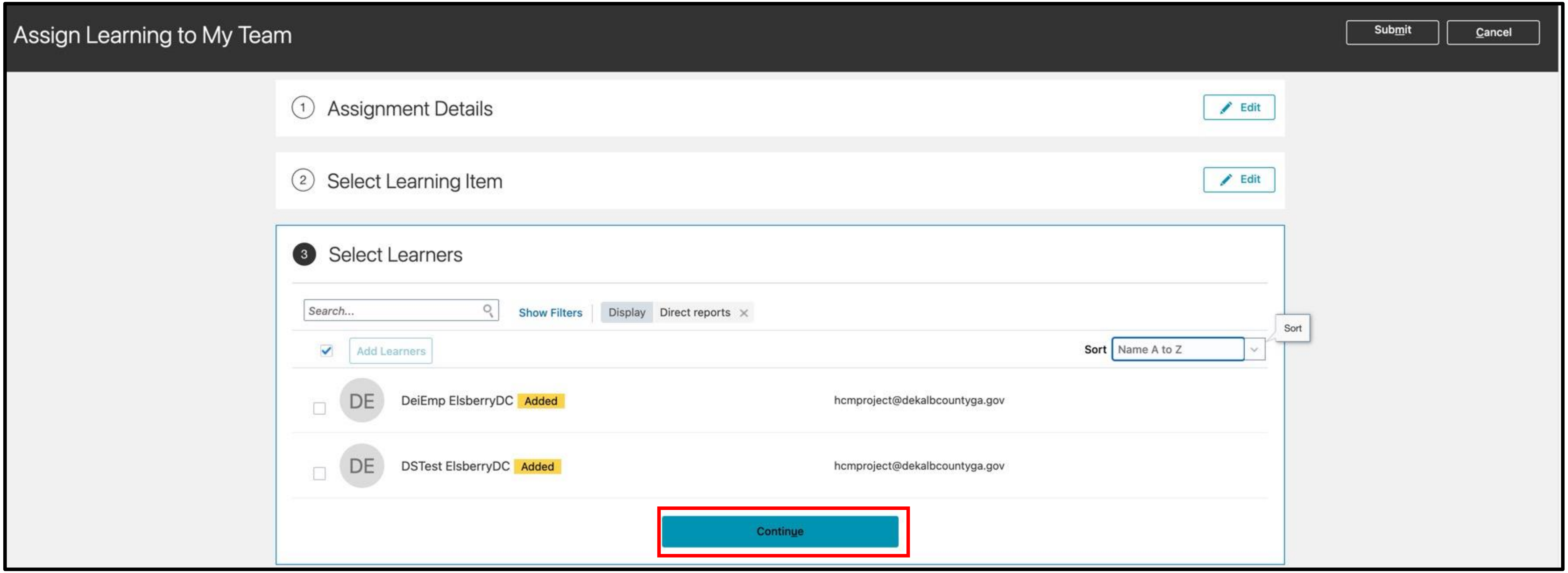
Recommend and Assign Learnings



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

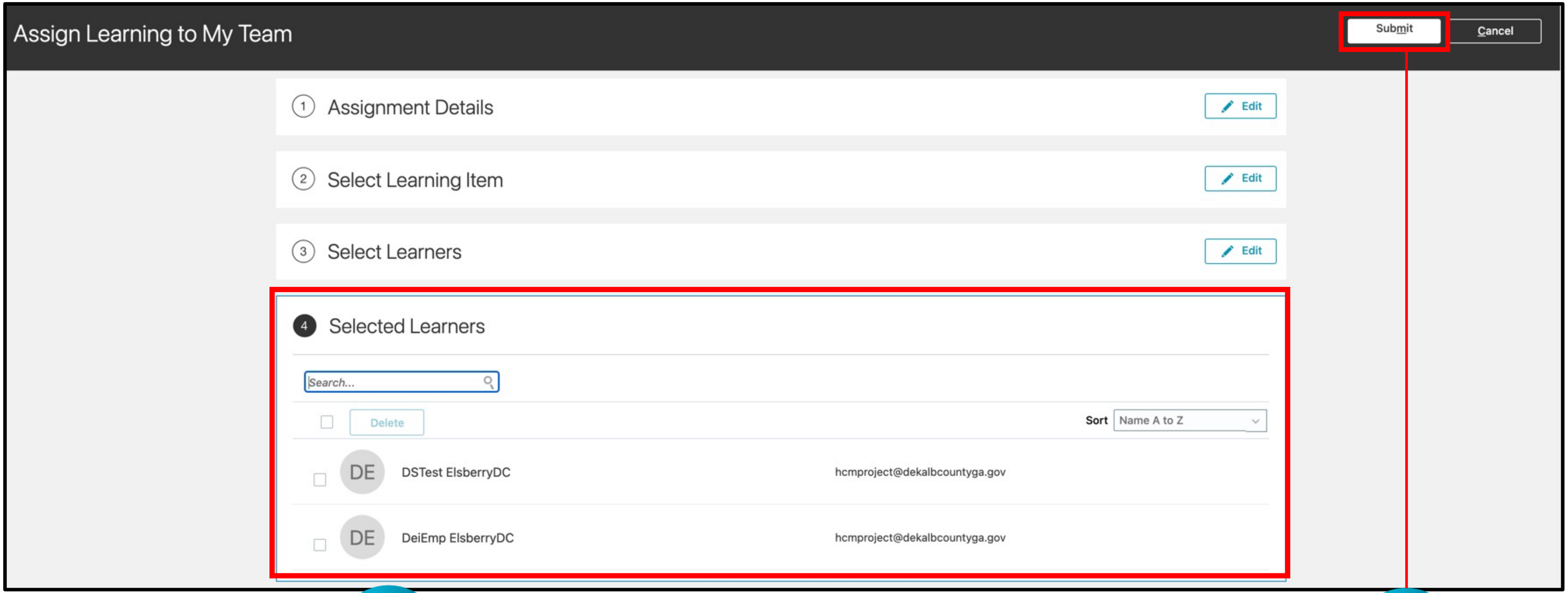


17

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

Select the Continue button.

Recommend and Assign Learnings

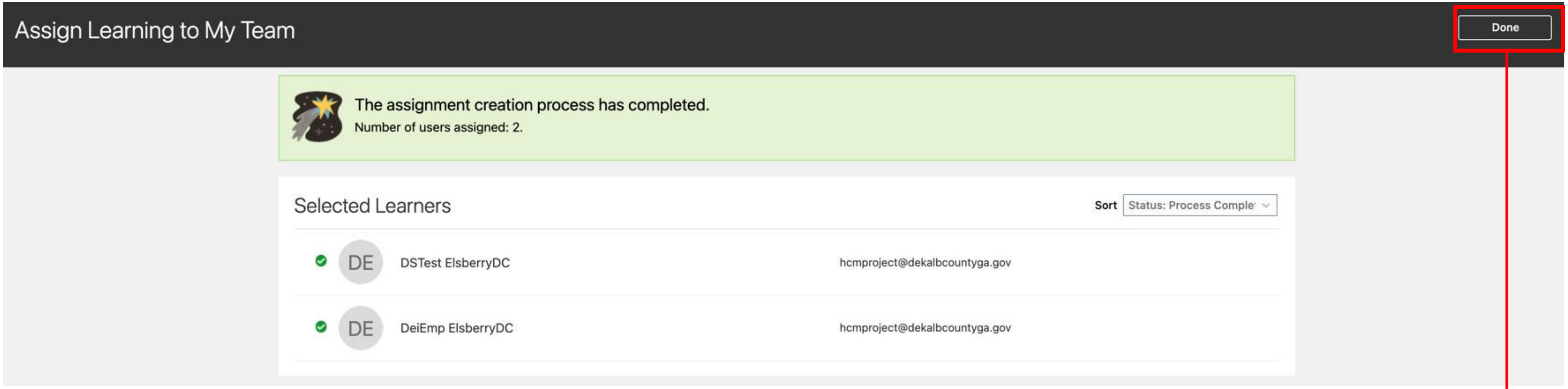


18 Confirm that the selected list of learners is correct.

Select the Submit button. 19

Recommend and Assign Learnings

CloudVergent 360



20

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

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

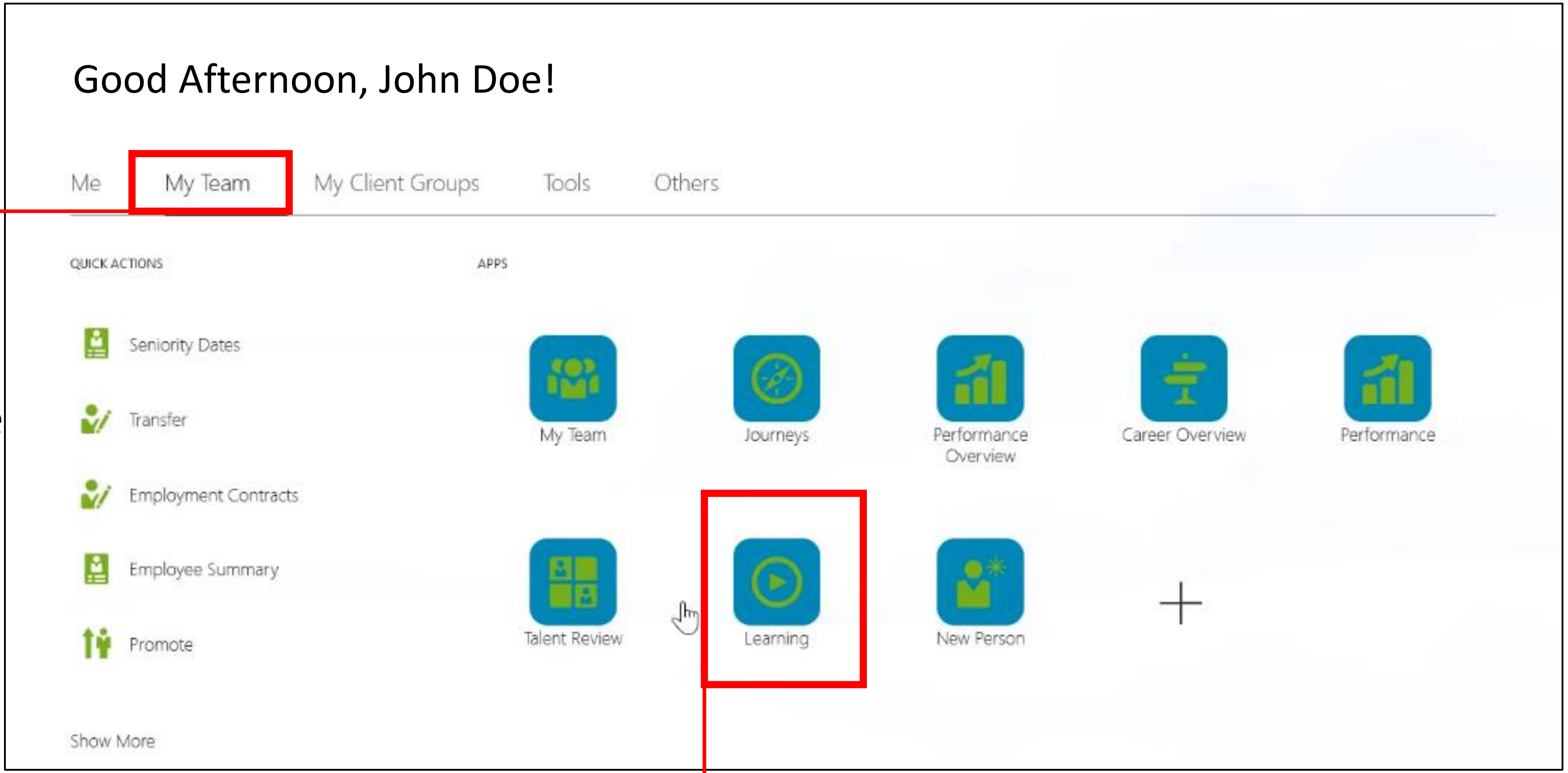
CloudVergent 360

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



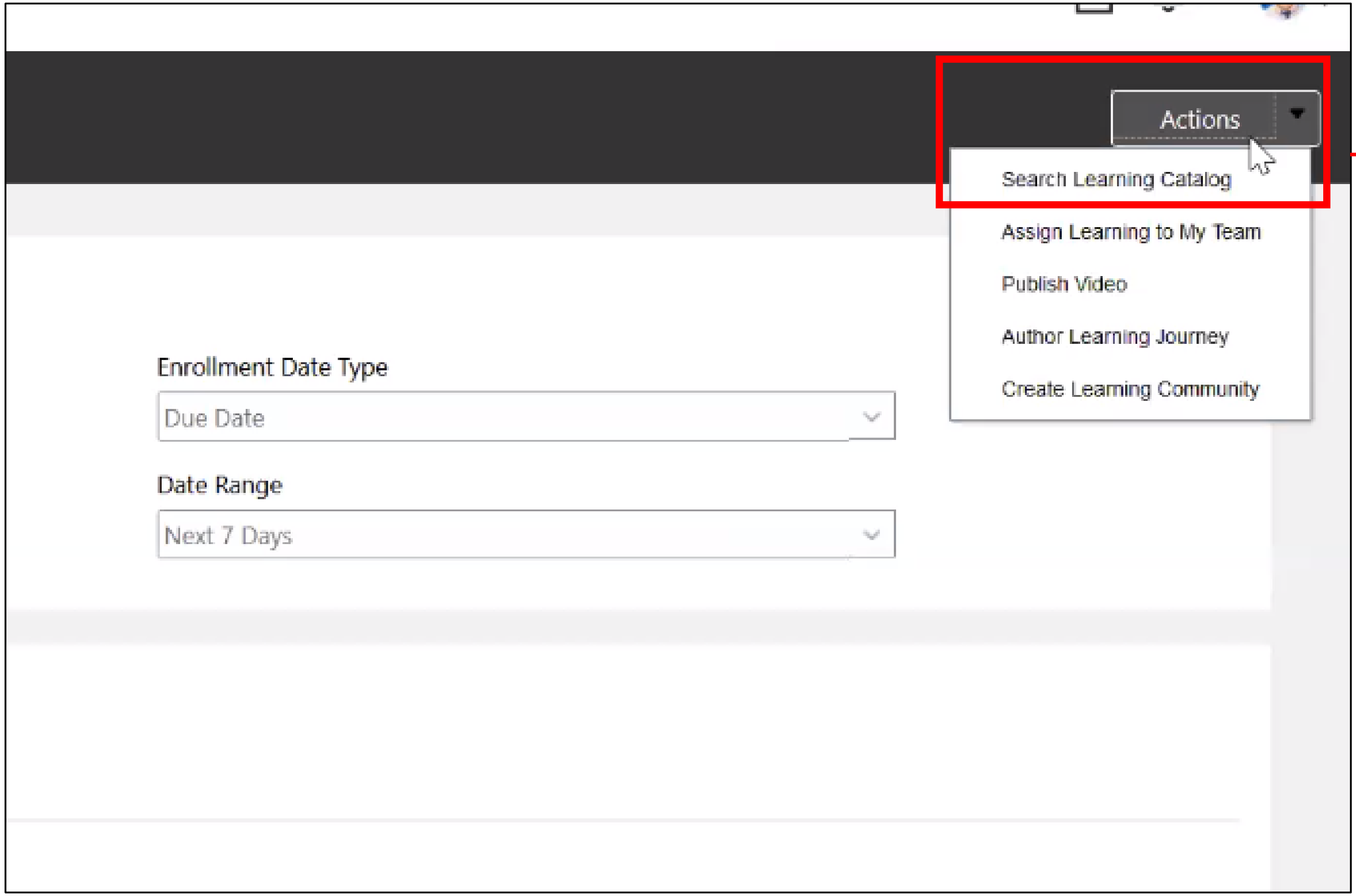
1

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

2

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

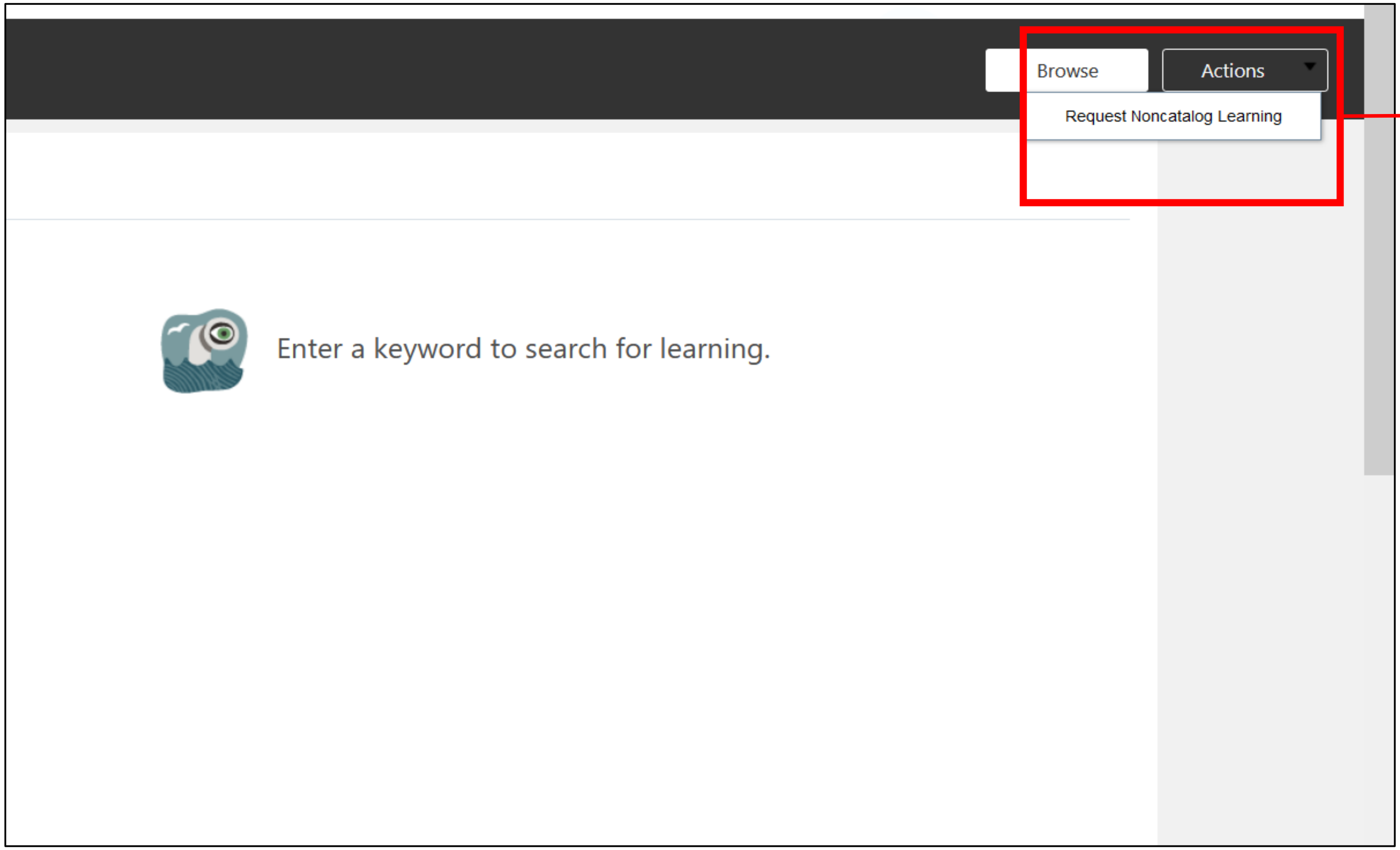
Request Non-Catalog Learning Item



3

Select Search Learning Catalog from the Actions drop-down list

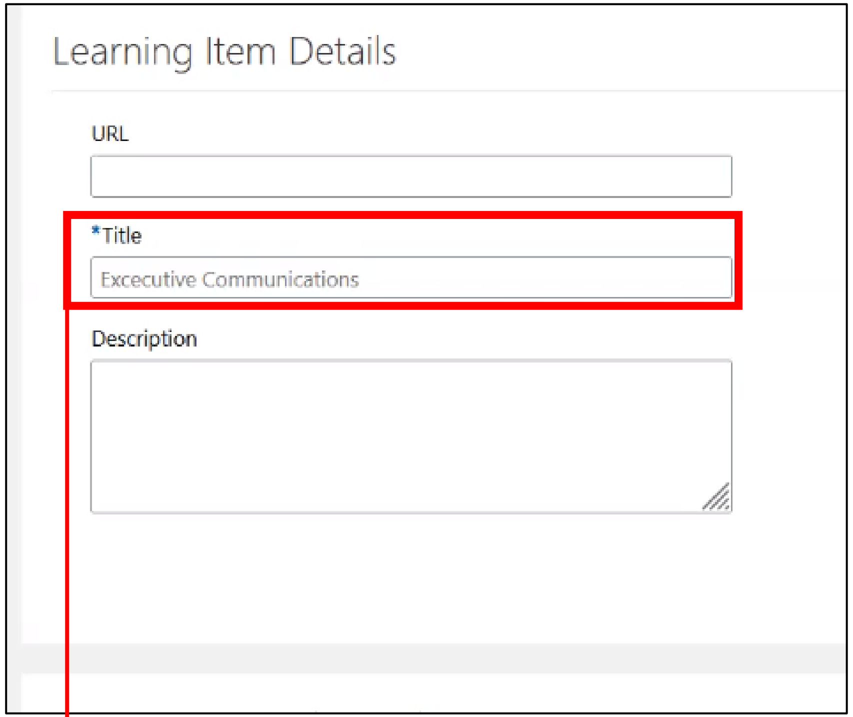
Request Non-Catalog Learning Item



4

Select Request Noncatalog Learning from the Actions drop-down list

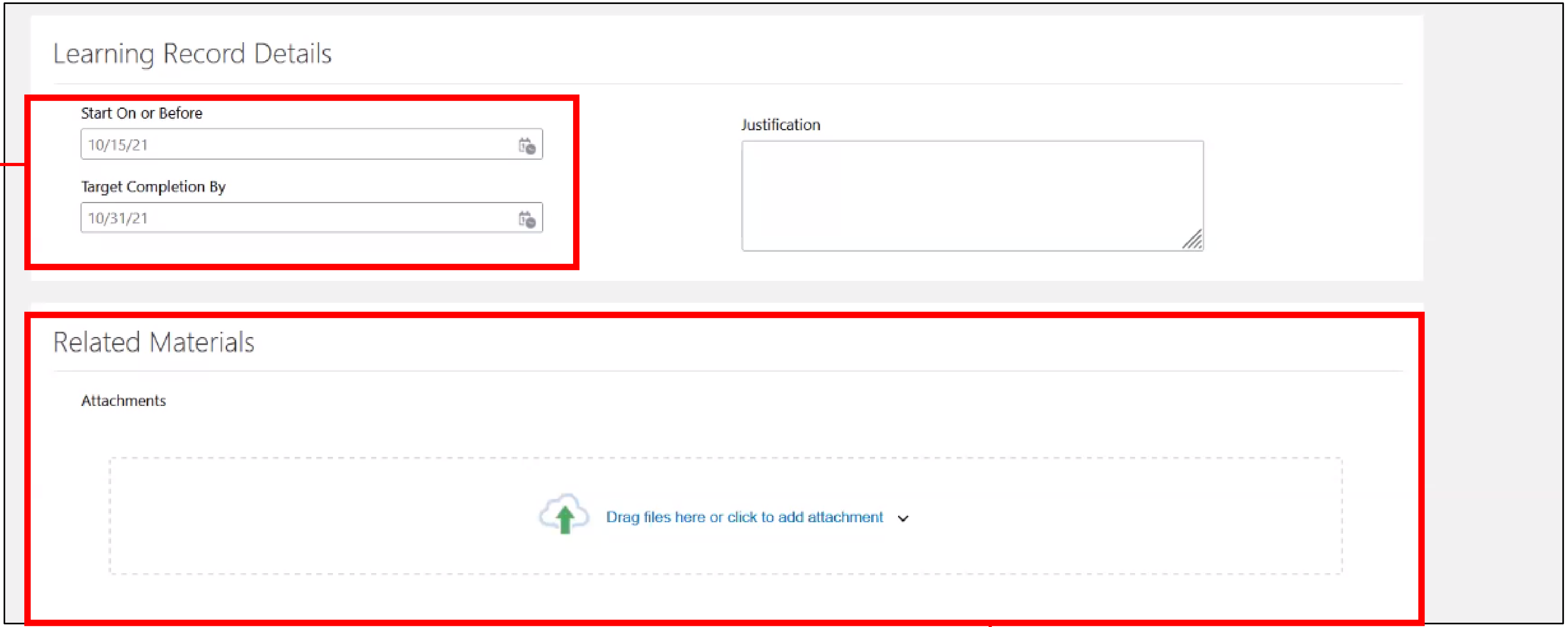
Request Non Catalog Learning Item



5

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

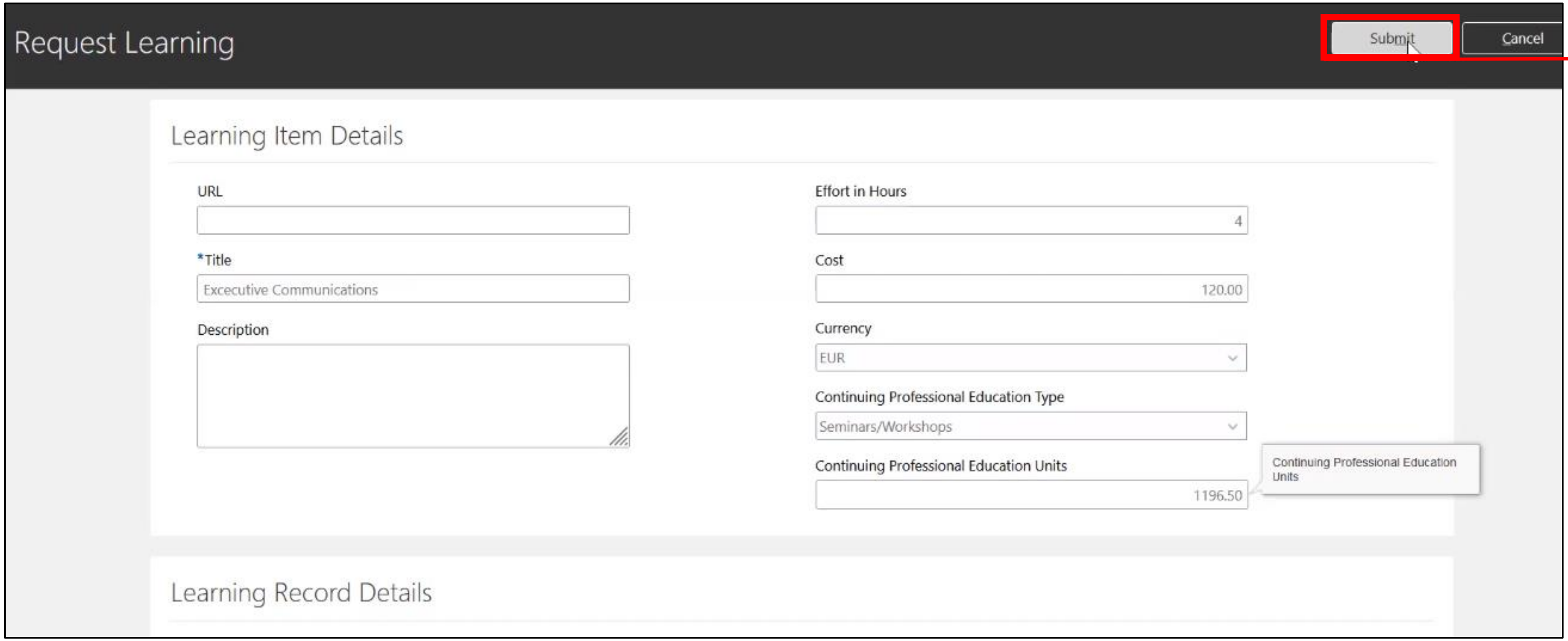
Request Non Catalog Learning Item



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



8

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

Lesson 17: View Learning Status (Learning)

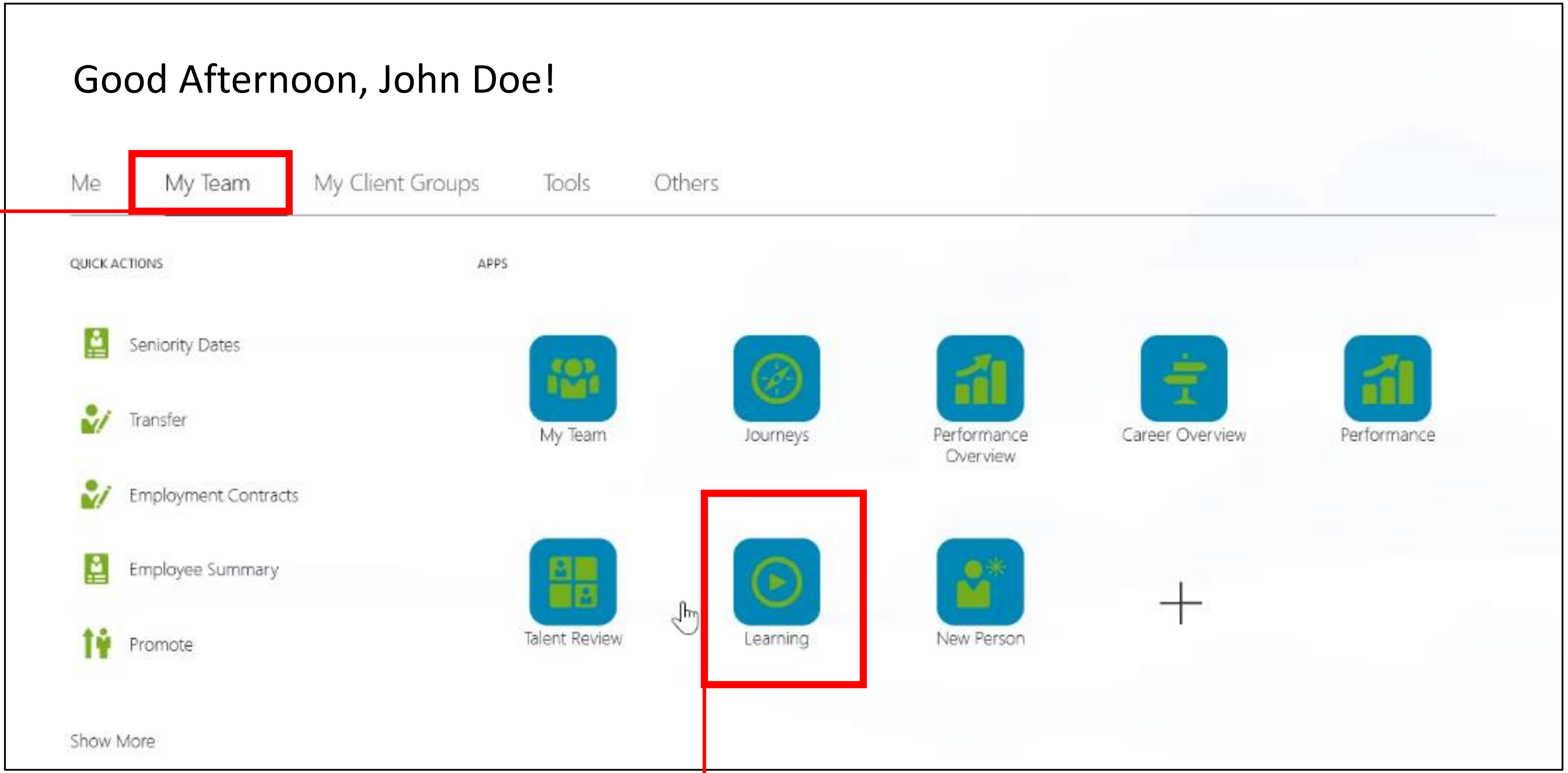
CloudVergent 360

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

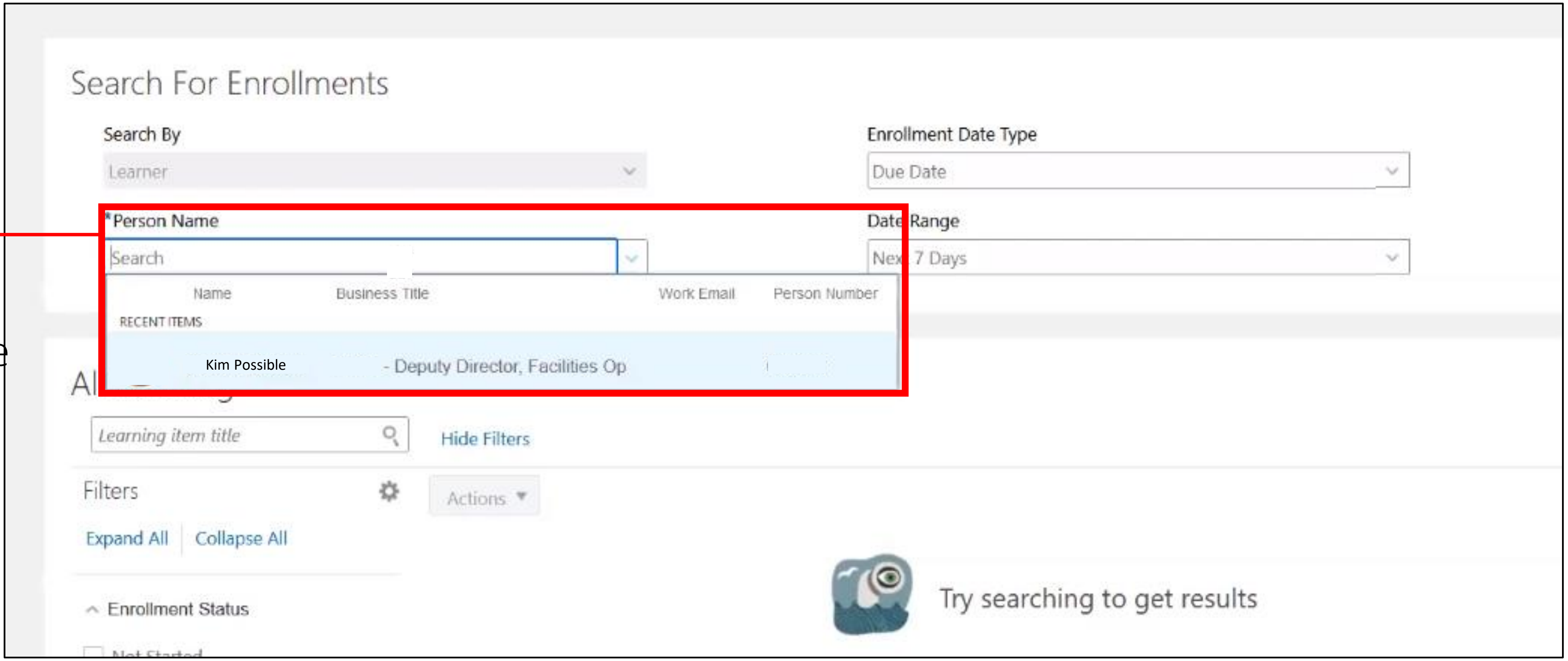
2

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

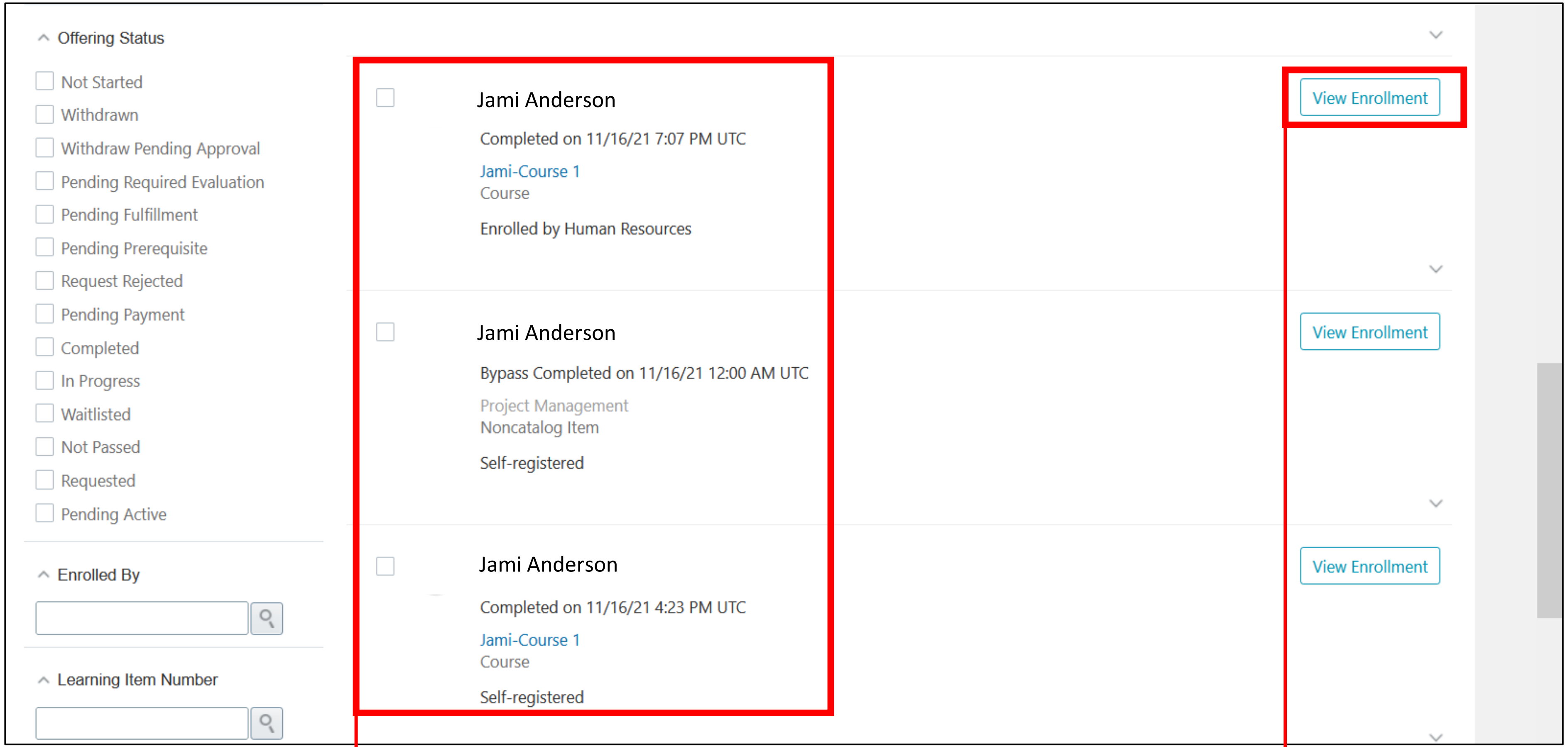
View Learning Status

3

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



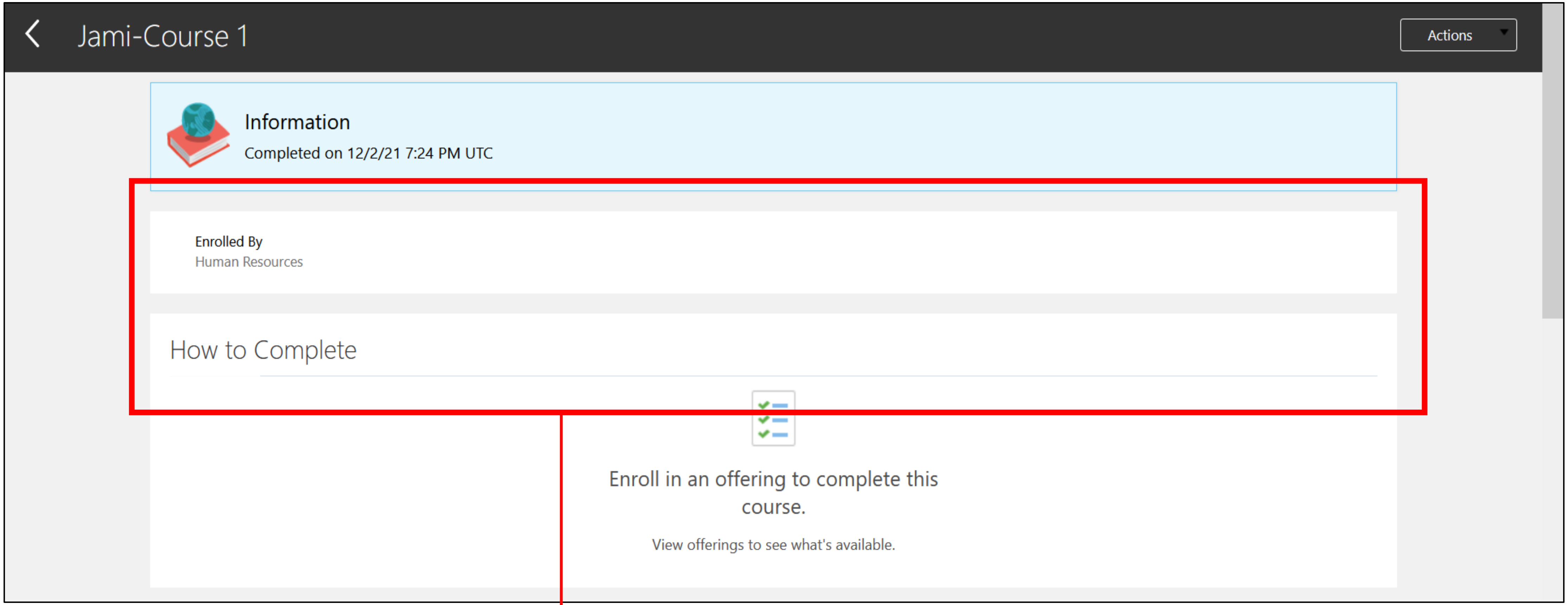
View Learning Status



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



6

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

CloudVergent 360

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 witdraw. 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.