

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:

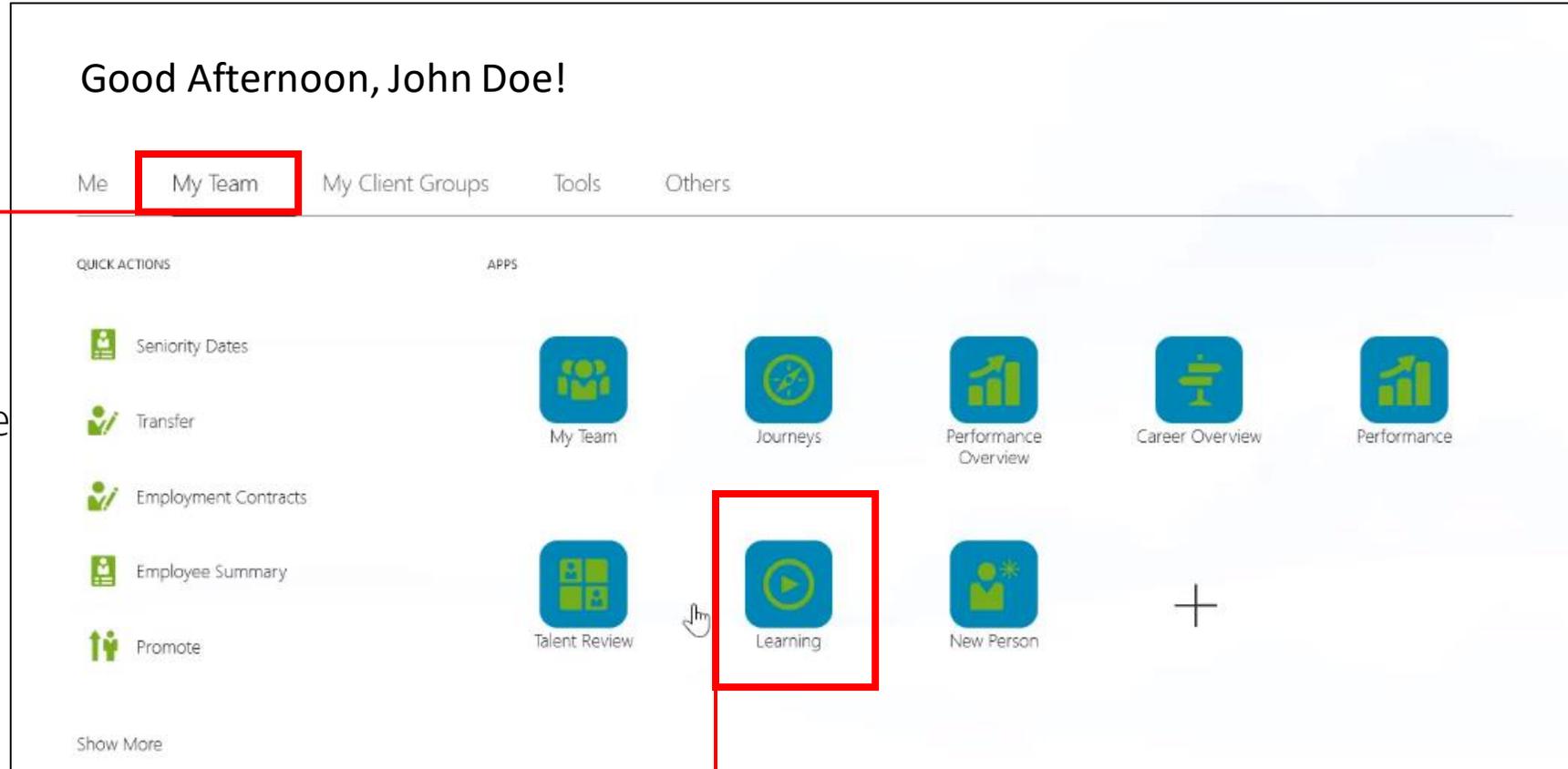
Objective

- Recommend Learning Items to specific Direct and Indirect Reports

Recommend and Assign Learnings

1

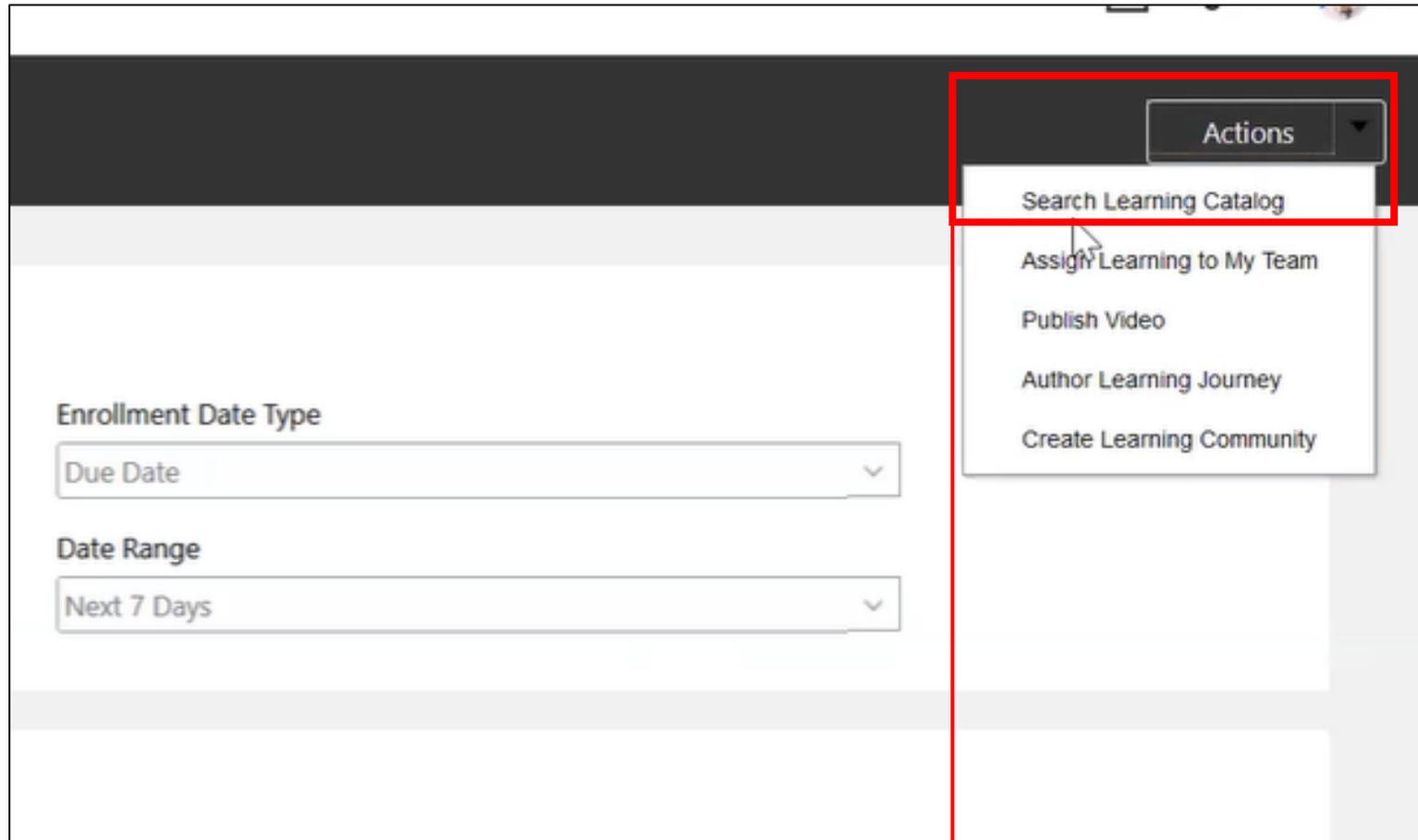
Select the **My Team** tab from the CV360 homepage



2

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

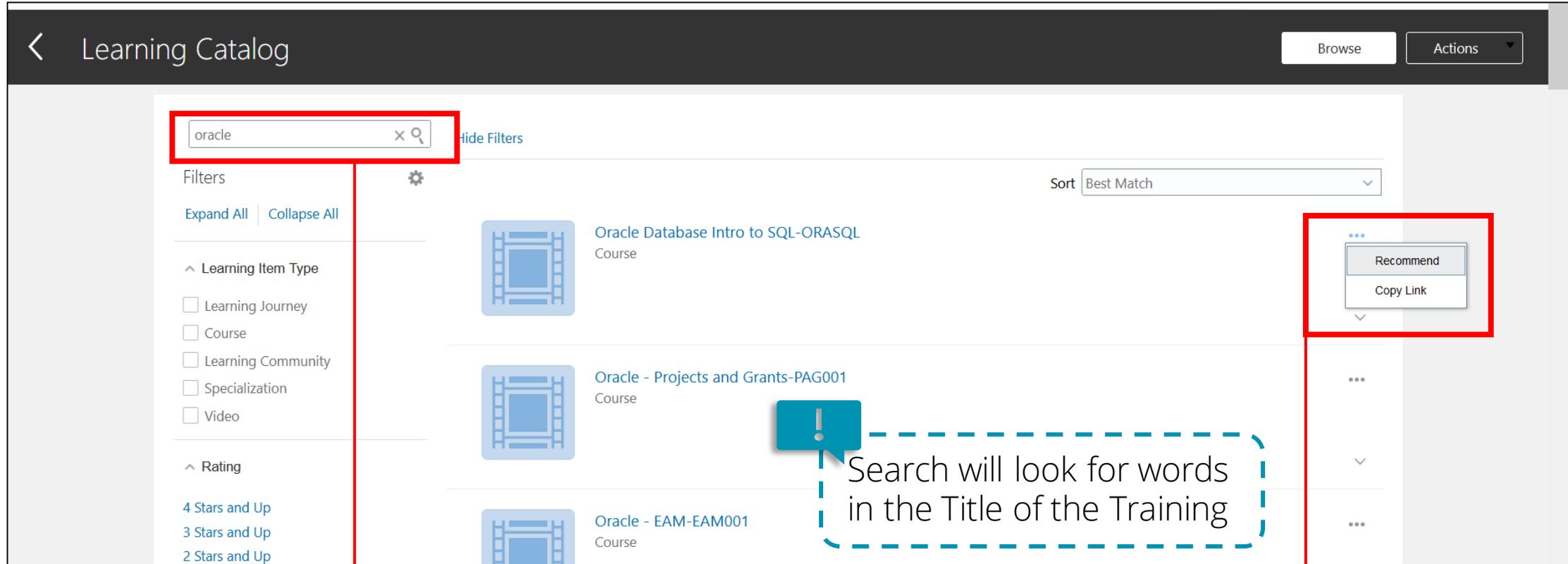
Recommend and Assign Learnings



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 search bar containing the text 'oracle'. Below the search bar, there are filter options under 'Filters', including 'Learning Item Type' (Learning Journey, Course, Learning Community, Specialization, Video) and 'Rating' (4 Stars and Up, 3 Stars and Up, 2 Stars and Up). The search results are sorted by 'Best Match' and list three courses: 'Oracle Database Intro to SQL-ORASQL', 'Oracle - Projects and Grants-PAG001', and 'Oracle - EAM-EAM001'. A red box highlights the search bar, and another red box highlights the 'Recommend' button in the actions menu for the first course. A callout box with a dashed border and a blue exclamation mark icon points to the search results, stating '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

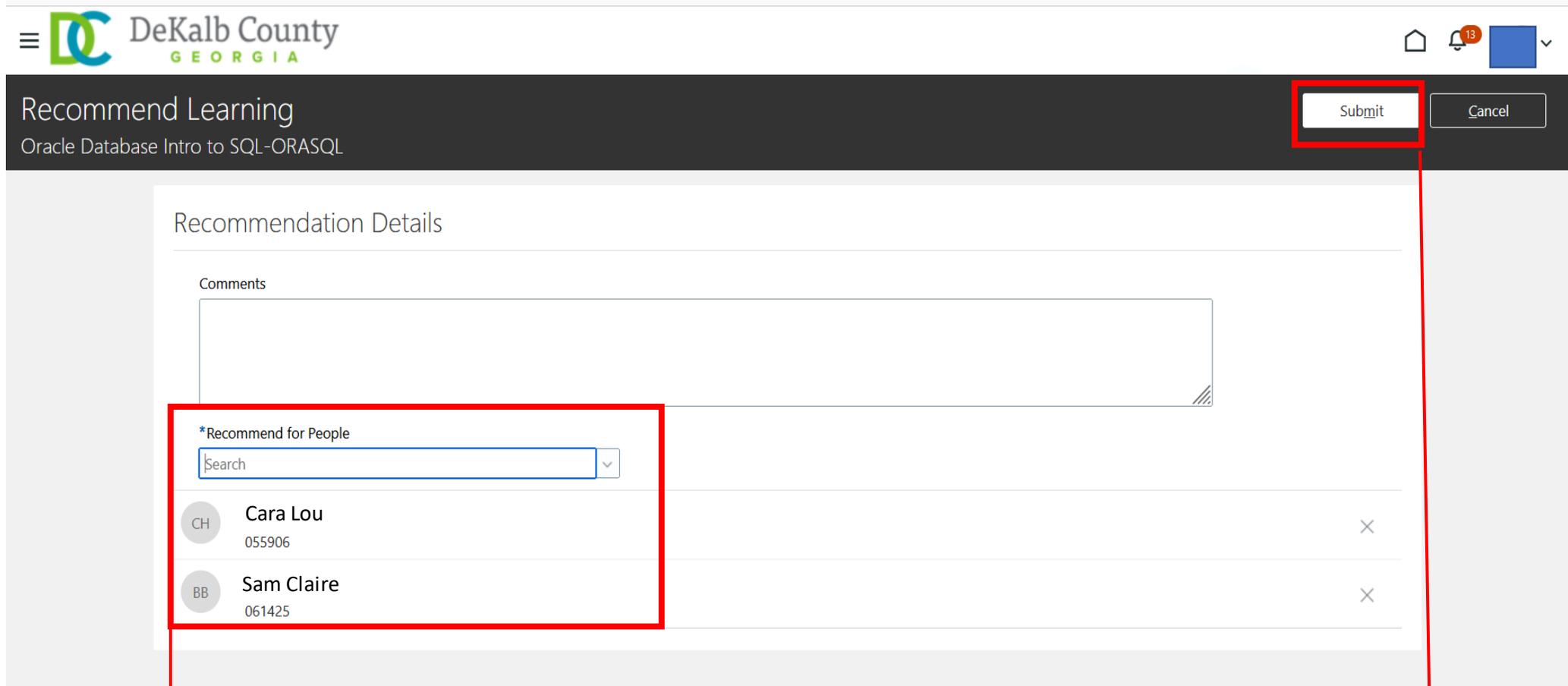
6

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



DeKalb County
GEORGIA

Recommend Learning
Oracle Database Intro to SQL-ORASQL

Recommendation Details

Comments

*Recommend for People

Search

CH Cara Lou
055906

BB Sam Claire
061425

Submit Cancel

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:

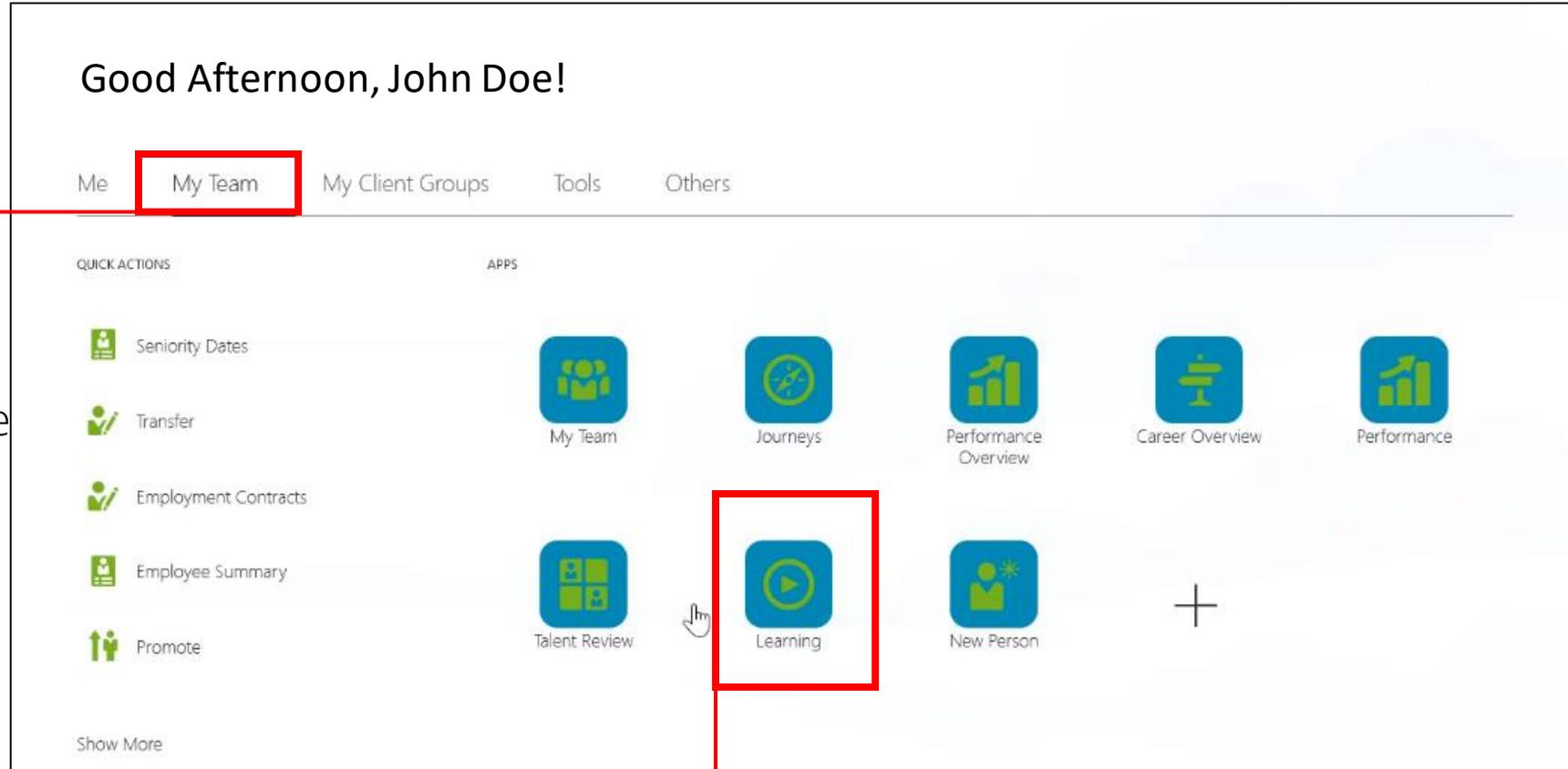
Objective

- Assign Learning to Direct and Indirect Reports

Recommend and Assign Learnings

1

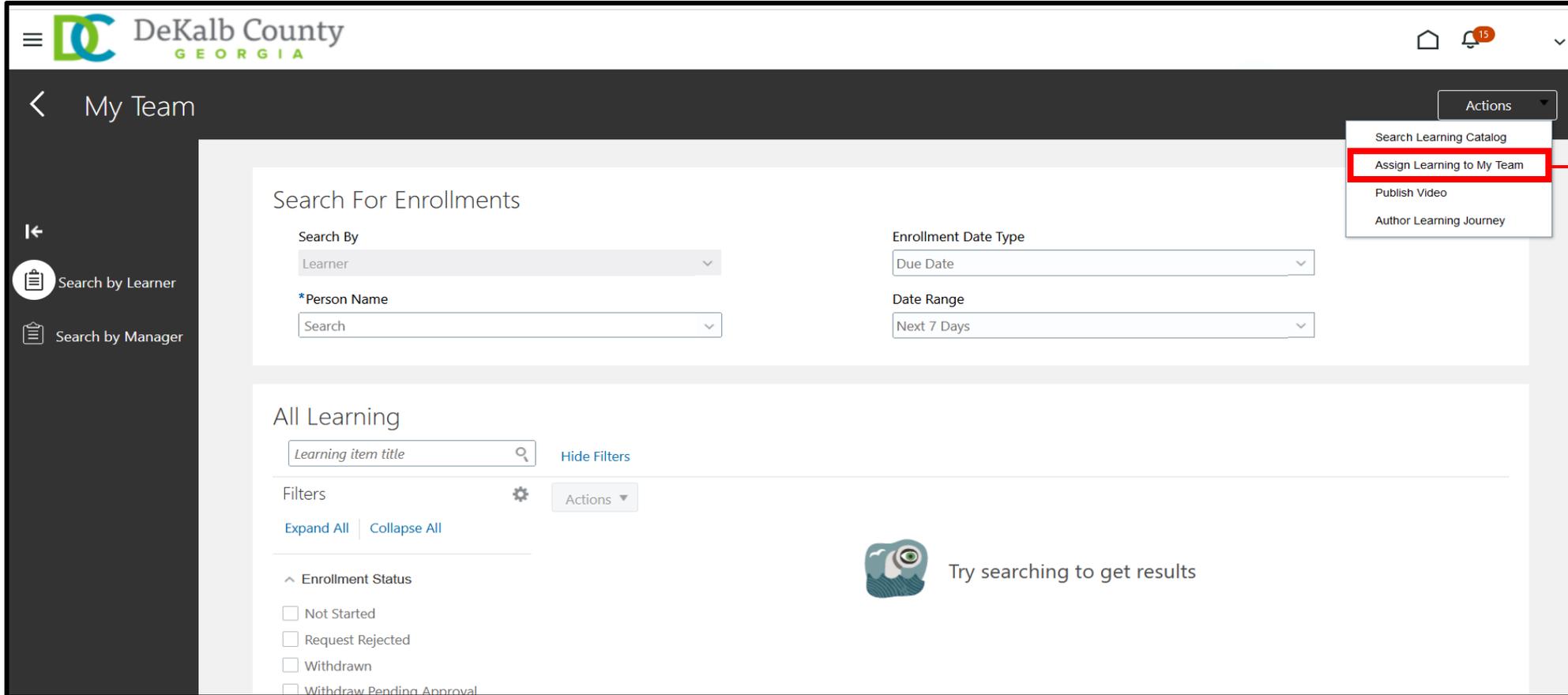
Select the **My Team** tab from the CV360 homepage



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 dropdown arrow. 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', 'Hide Filters', and an 'Actions' dropdown menu. The 'Actions' 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. Below the 'All Learning' section, there are filter options for 'Enrollment Status' (Not Started, Request Rejected, Withdrawn, Withdraw Pending Approval) and a message 'Try searching to get results' with a magnifying glass icon.

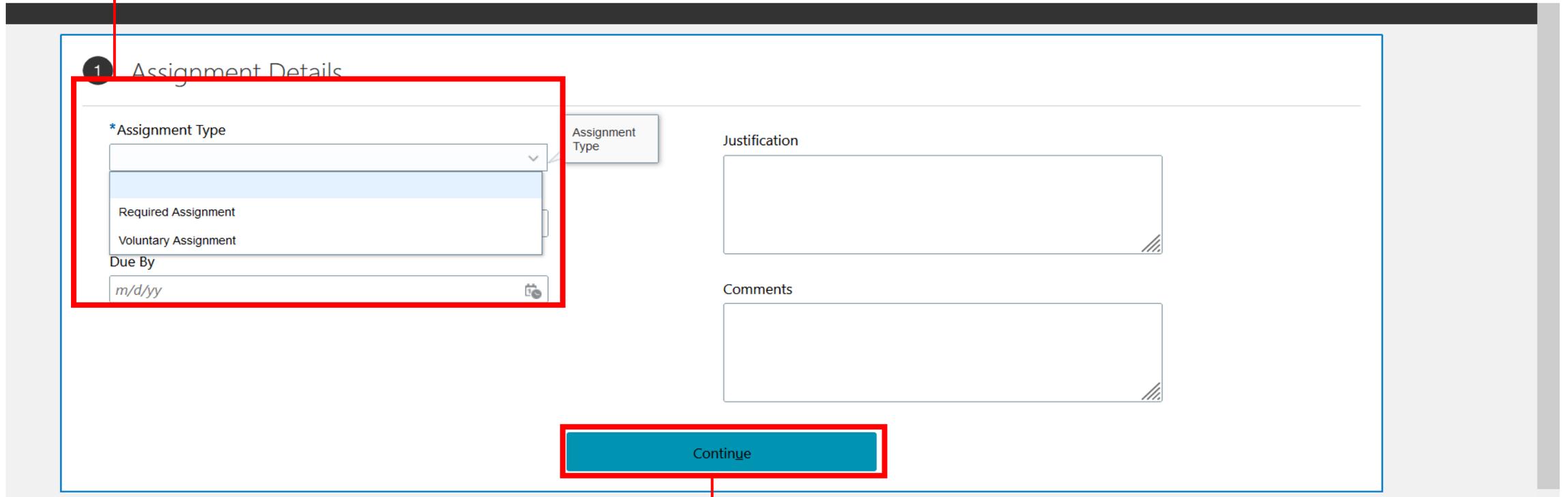
3
Select **Assign Learning to My Team** from the **Actions** drop-down list

! 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



1 Assignment Details

*Assignment Type

Assignment Type

Required Assignment

Voluntary Assignment

Due By

m/d/yy

Justification

Comments

Continue

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



Sort Best Match

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



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 Hide Filters

Filters Expand All Collapse All

Sort: Best Match

- Performance Management Writing-LDR007 Course
- Certificate - Finance Risk Management Course
- 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 × Sort Name A to Z ▾

Add Learners

<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

[Delete](#) Sort

<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:

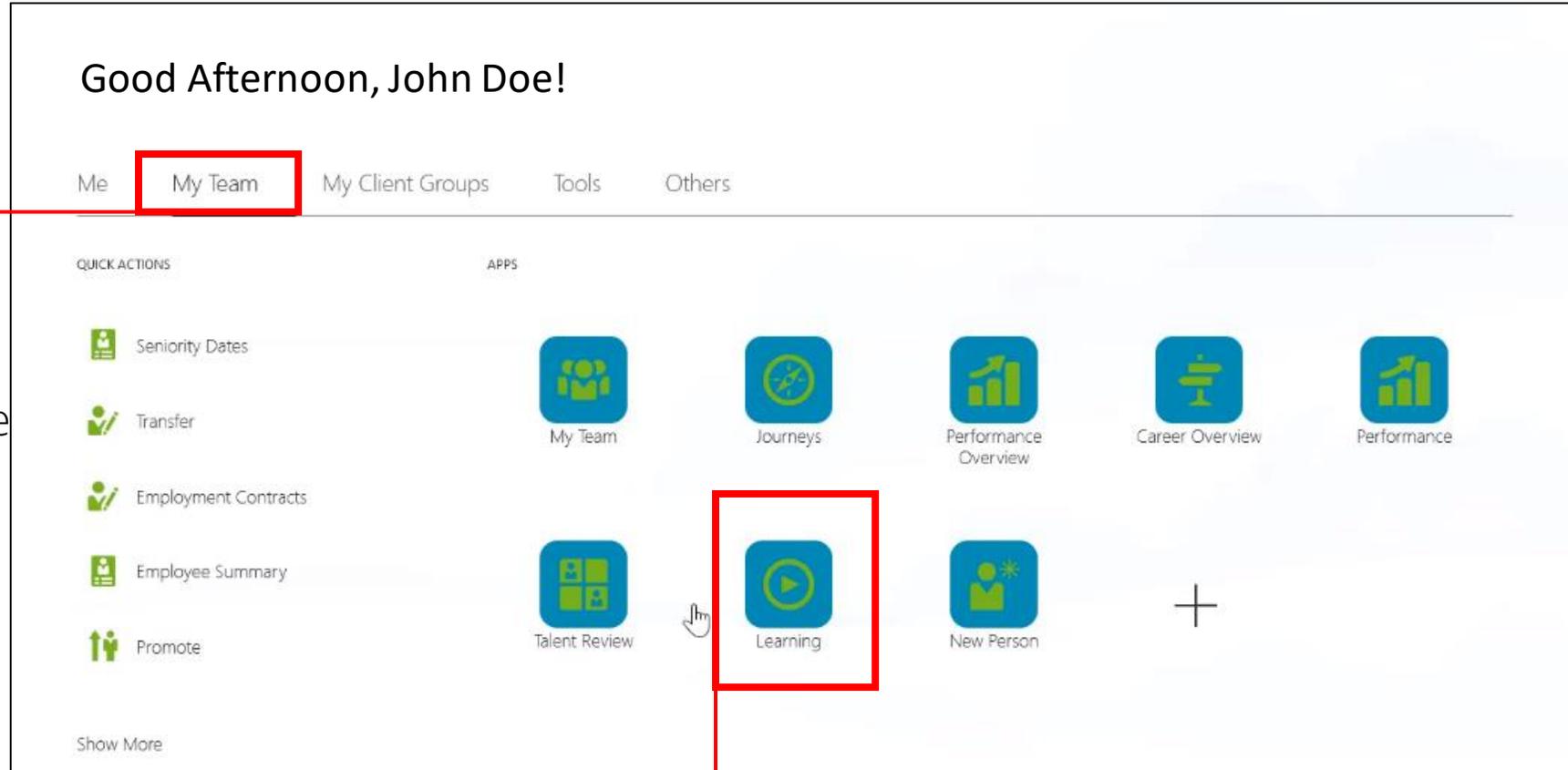
Objective

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

Request Non-Catalog Learning Item

1

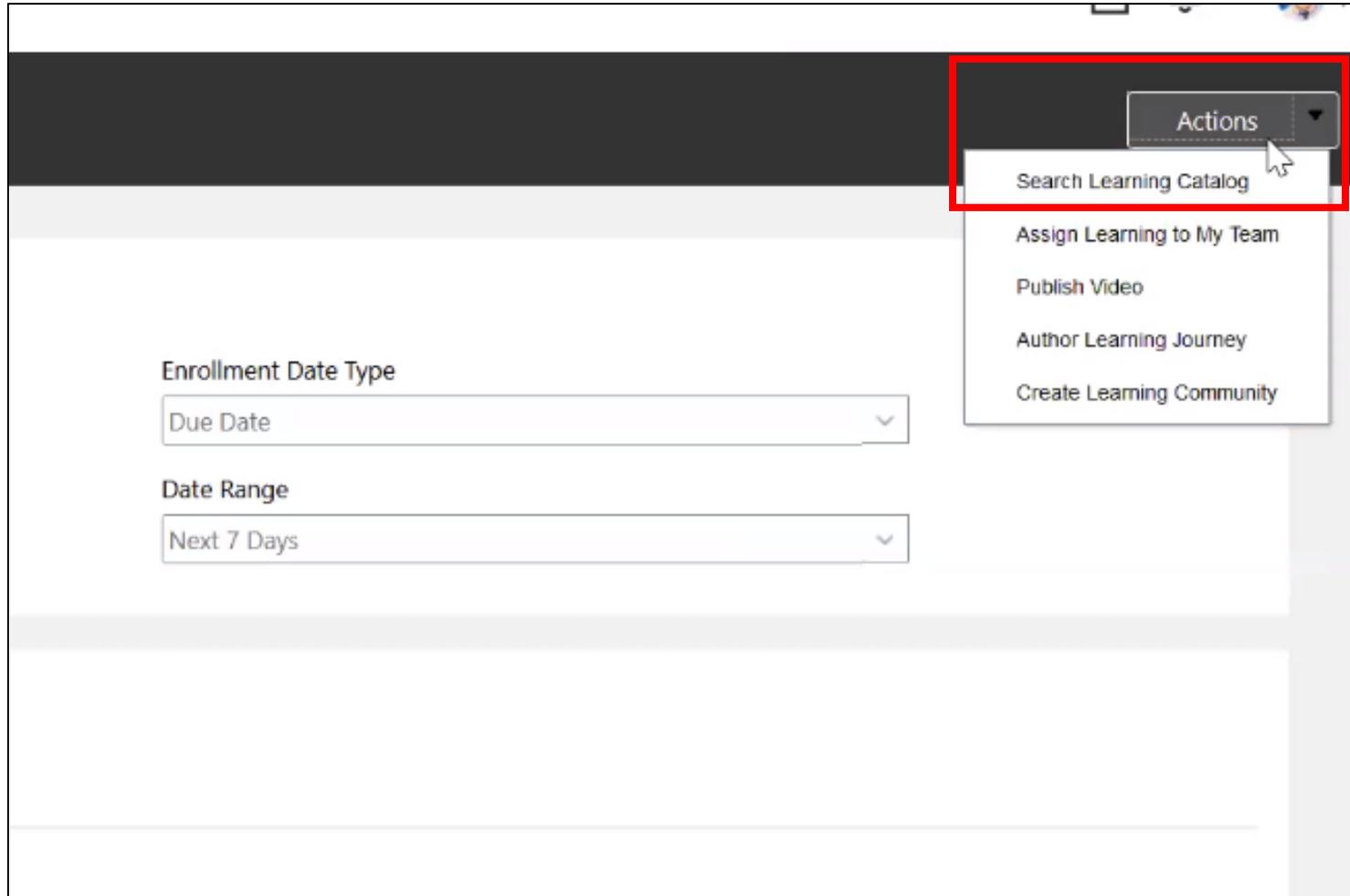
Select the **My Team** tab from the CV360 homepage



2

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

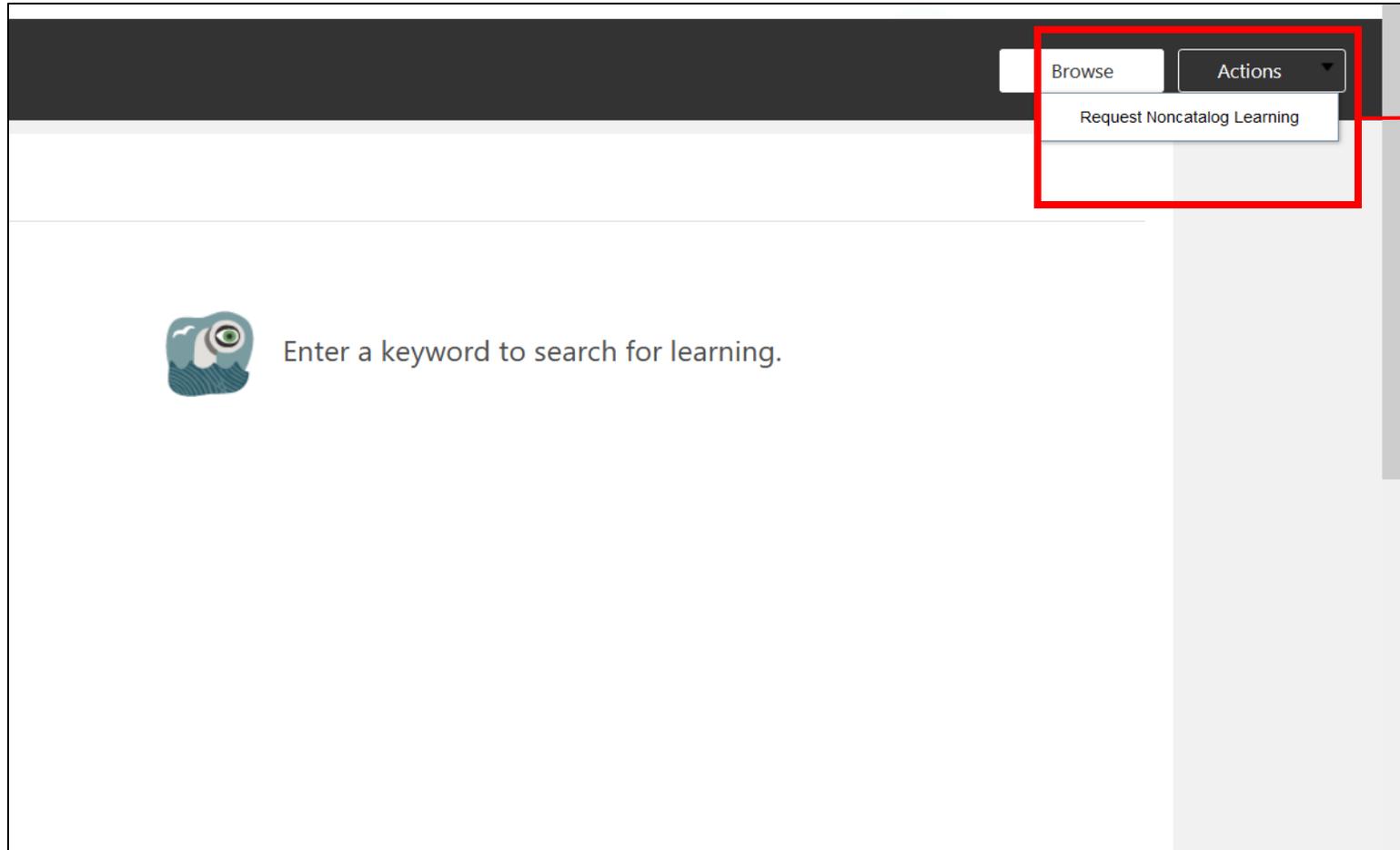
Request Non-Catalog Learning Item



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

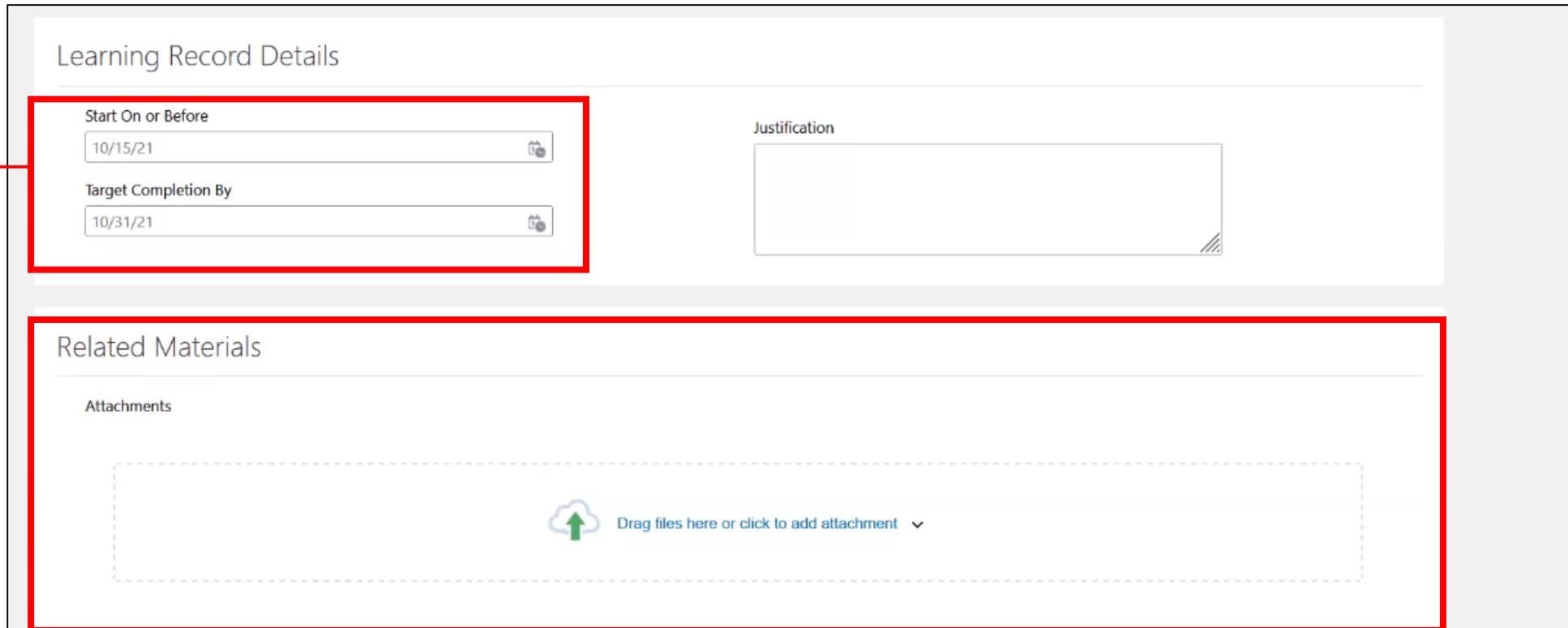
*Title

Description

5

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

Request Non-Catalog Learning Item



Learning Record Details

Start On or Before
10/15/21

Target Completion By
10/31/21

Justification

Related Materials

Attachments

Drag files here or click to add attachment

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:

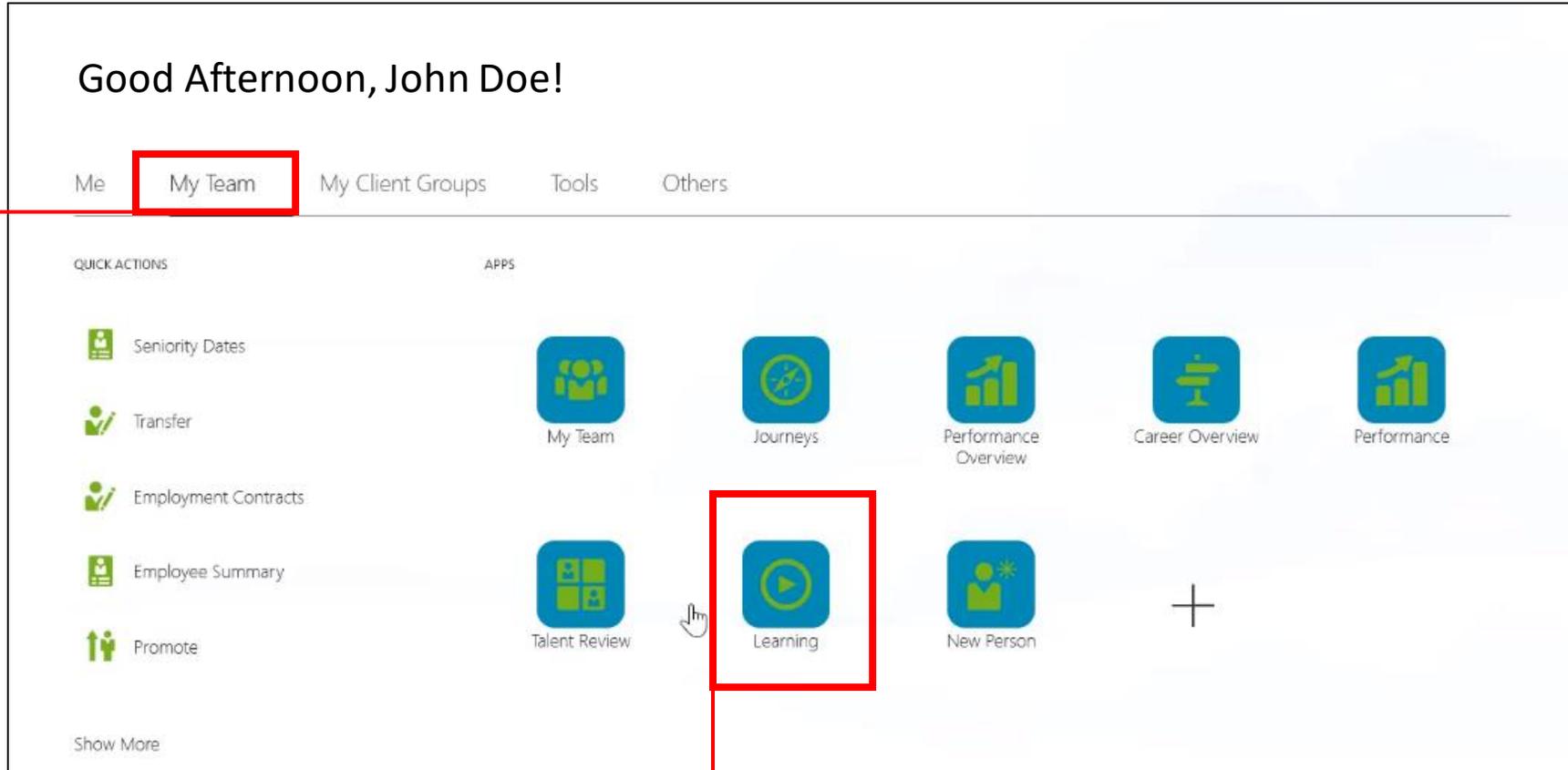
Objective

- View the Learning Status for specific Direct and Indirect Reports

View Learning Status

1

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



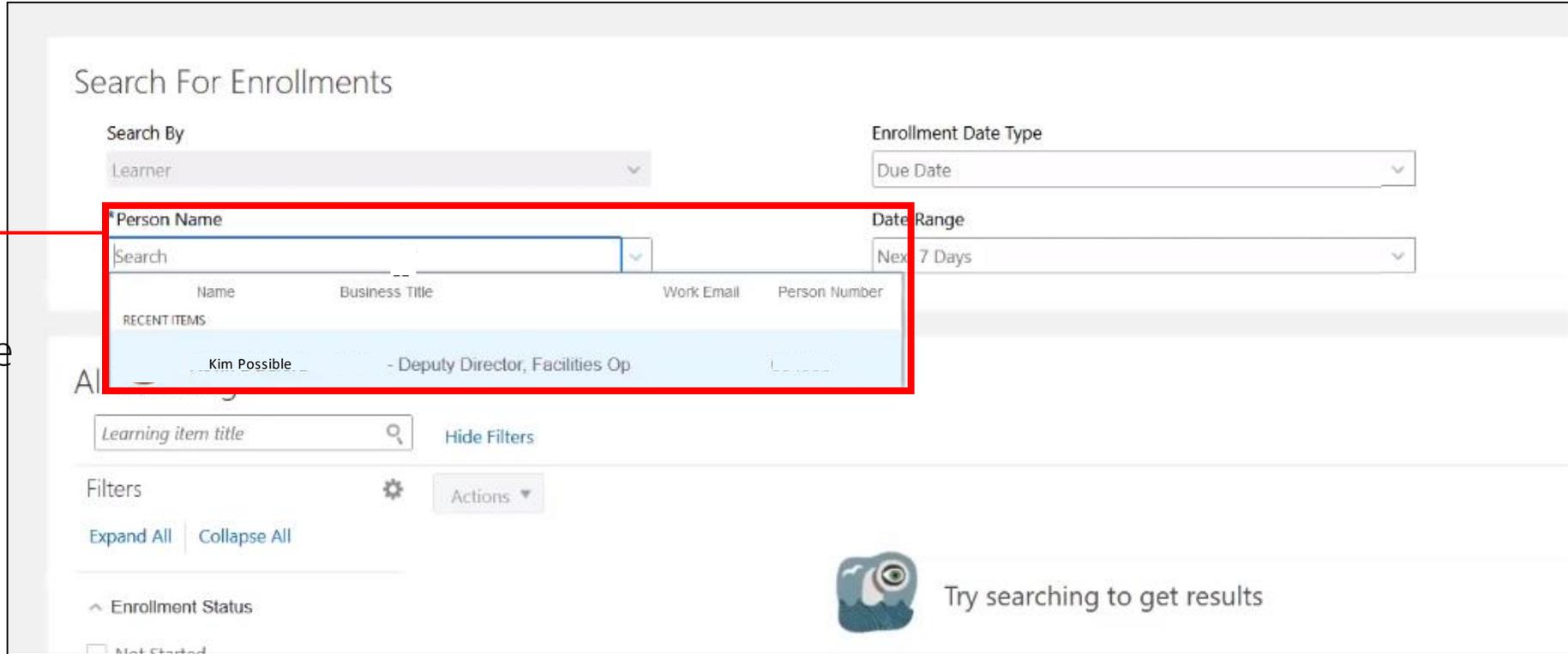
2

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

View Learning Status

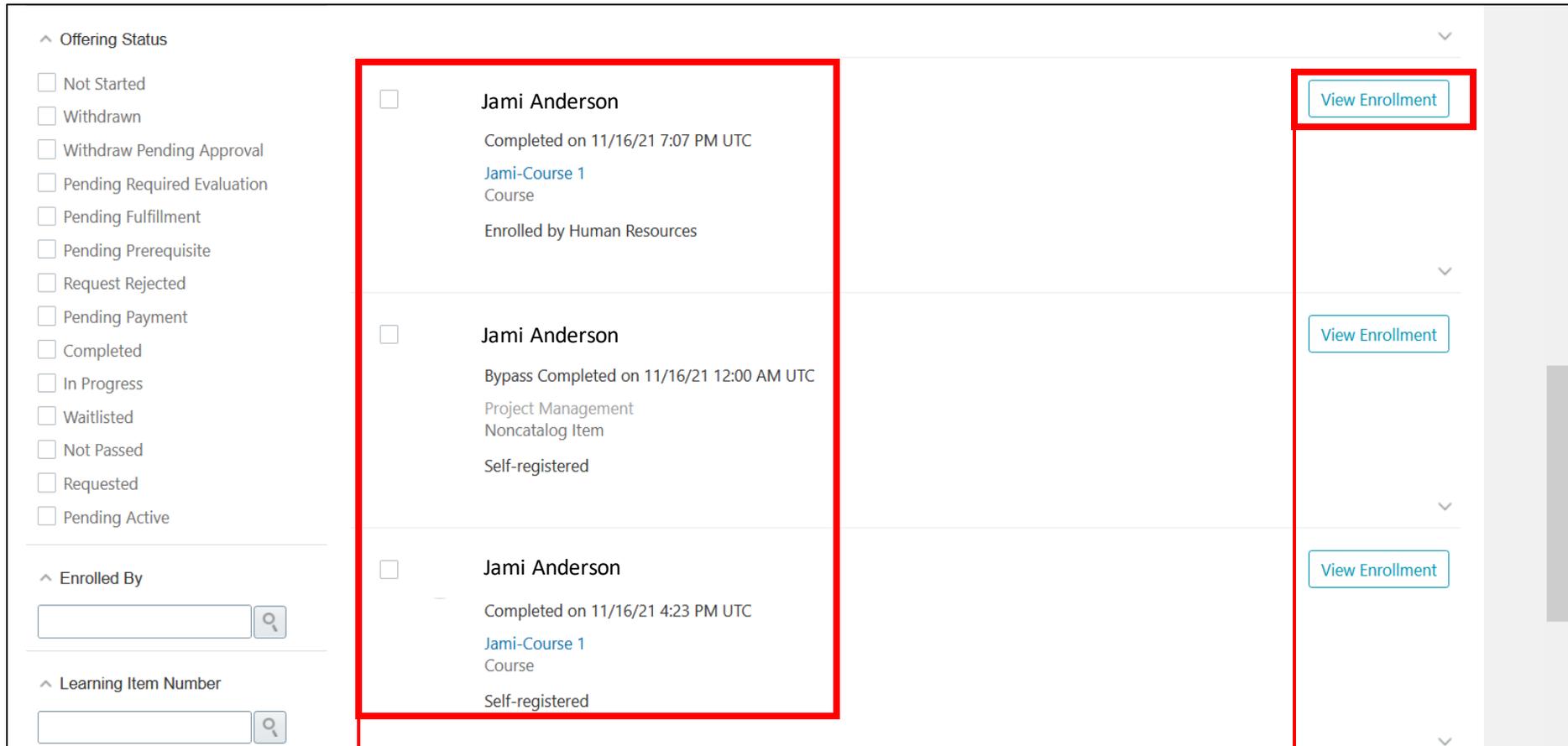
3

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



The screenshot shows the 'Search For Enrollments' interface. The 'Search By' dropdown is set to 'Learner'. The 'Enrollment Date Type' is set to 'Due Date'. The 'Date Range' is set to 'Next 7 Days'. The 'Person Name' field is highlighted with a red box, and a dropdown menu is open showing a search result for 'Kim Possible - Deputy Director, Facilities Op'. Below the search field, there is a table with columns for Name, Business Title, Work Email, and Person Number. The table shows a recent item for 'Kim Possible - Deputy Director, Facilities Op'. Below the table, there is a search bar for 'Learning item title', a 'Hide Filters' button, and a 'Filters' section with 'Expand All' and 'Collapse All' buttons. At the bottom, there is an 'Enrollment Status' section with a 'Not Started' checkbox and a 'Try searching to get results' button.

View Learning Status



The screenshot displays a web interface for viewing learning status. On the left, there are filter sections for 'Offering Status' and 'Enrolled By'. The 'Offering Status' section contains a list of checkboxes for various statuses: Not Started, Withdrawn, Withdraw Pending Approval, Pending Required Evaluation, Pending Fulfillment, Pending Prerequisite, Request Rejected, Pending Payment, Completed, In Progress, Waitlisted, Not Passed, Requested, and Pending Active. Below this is the 'Enrolled By' section with a search input field. The main area shows a list of three entries for 'Jami Anderson'. Each entry includes a checkbox, the name, completion date, course name, and enrollment type. The first entry is 'Completed on 11/16/21 7:07 PM UTC', 'Jami-Course 1 Course', and 'Enrolled by Human Resources'. The second entry is 'Bypass Completed on 11/16/21 12:00 AM UTC', 'Project Management Noncatalog Item', and 'Self-registered'. The third entry is 'Completed on 11/16/21 4:23 PM UTC', 'Jami-Course 1 Course', and 'Self-registered'. To the right of each entry is a 'View Enrollment' button. A red box highlights the first entry and its button, and another red box highlights the second and third entries and their buttons.

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