

## Job Aid: Managing Learning Activities (Supervisor)

### Purpose

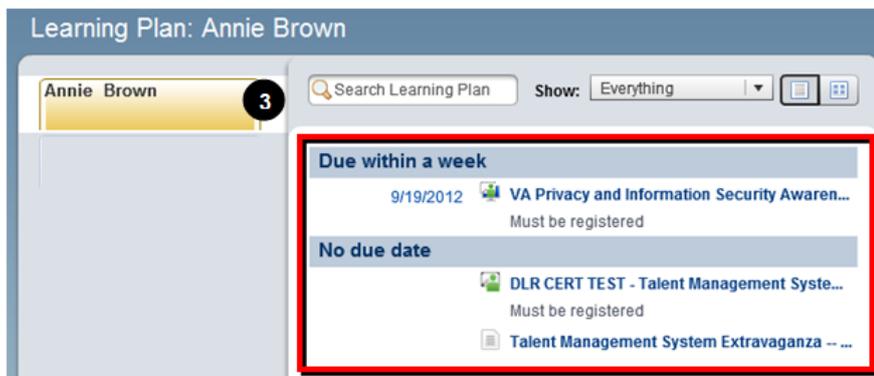
The purpose of this job aid is to guide supervisor users through the step-by-step process of managing employees' Learning Plan within SuccessFactors Learning.

### Task A. View an Employee's Learning Plan

1. Click on the My Employees tab from the VA TMS Home page
2. Hover over an employee card to perform the available actions without loading the user's Learning Plan.



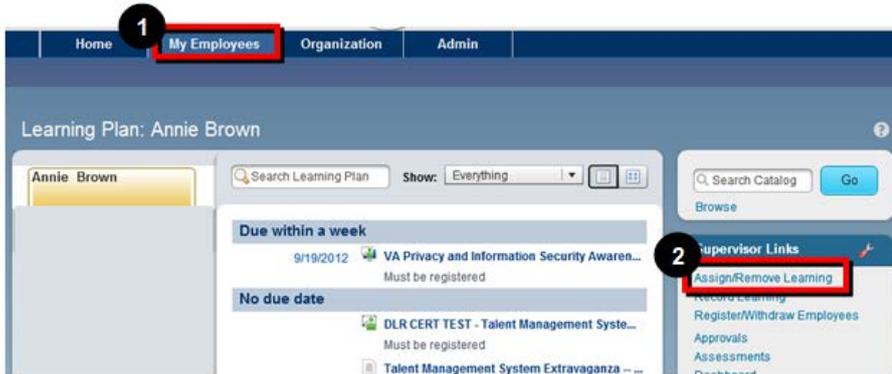
3. When you click an employee card, that user's Learning Plan is displayed.



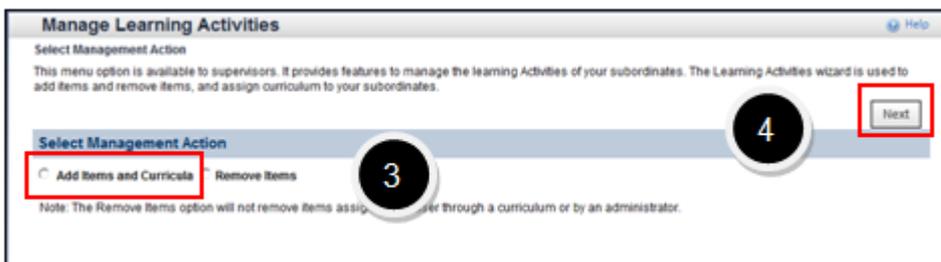
*Note: You may customize the view by filtering the Learning Plan to show Learning only, Registrations, etc.*

### Task B. Assign Items to an Employee's Learning Plan

1. From the Learning page, click the My Employees tab.
2. Click the Assign/Remove Learning supervisor link.



3. Click Add Items and Curricula.
4. Click Next.



5. Click the Items and Curricula Add icon (+).

## Assign Learning

### Enter Learning Activity Details

\* Required

<input type="checkbox"/> <b>Items and Curricula</b> <span style="color: green;">+</span> <b>5</b>
There are no items or curricula selected.
<input type="checkbox"/> <b>Employees</b> <span style="color: green;">+</span>
There are no employees selected.

6. Enter keywords to search for the item/curricula to assign to the employee.
7. Use the checkboxes to further filter your search.
8. Click Search.

9. From the search results list, click the check the Select checkbox.
10. Click Add.

Title	ID	Type	Select
A Rich Tapestry of Cultural Contrasts	ONLINE HR-901 (Rev 11/13/2009CST)		<input type="checkbox"/>
Account Planning, Development, and Growth.	COURSE SALES-101 (Rev 8/19/2009CST)		<input checked="" type="checkbox"/>
AICC Content Example (Articulate)	ONLINE EXAMPLE-AICC-01 (Rev 12/21/2010CST)		<input type="checkbox"/>
AICC Content Example (eTrinsic)	ONLINE EXAMPLE-AICC (Rev 12/21/2010CST)		<input type="checkbox"/>
Alarm Systems	COURSE EHS-148 (Rev 11/25/2008CST)		<input type="checkbox"/>
Allowable and Unallowable Charges	COURSE FA-304 (Rev 11/25/2008CST)		<input type="checkbox"/>

11. Modify the assignment type, assigned date, and required date as necessary.
12. Click the Employees Add icon (+).

**Assign Learning**

Enter Learning Activity Details

\*Required

Items and Curricula					
Title	Type	Assignment Type	*Assigned	Required Date	Remove
Account Planning, Development, and Growth	Account	Required	4/15/2012	4/29/2012	

Employees **12**

There are no employees selected.

13. Click the checkboxes next to the employees you wish to add the item/curricula to.

14. Click **Add**.

**Note:** Click the **Quick Select** icon (⏴) to simultaneously select all direct and/or indirect reports for the corresponding employee.

**My Team** ✕

Expand All | Collapse All

Name	<input type="checkbox"/> Select All	Quick Select
Marcus Q Hoff	<input type="checkbox"/>	⏴
Alexander Thompson	<input checked="" type="checkbox"/> <b>13</b>	
Darlene Sharp	<input checked="" type="checkbox"/>	
⊕ Richard Maxx	<input checked="" type="checkbox"/>	⏴
Sid Mormony	<input type="checkbox"/>	

**14**

The selected employees are listed.

15. Click **Continue**.

**Assign Learning**

Enter Learning Activity Details

\*Required

Items and Curricula					
Title	Type	Assignment Type	*Assigned	Required Date	Remove
Account Planning, Development, and Growth	Account	Required	4/10/2012	4/30/2012	

Employees **15**

Name	Remove
Sharp, Darlene,	
Thompson, Alexander,	
Maxx, Richard,	

Review and confirm the details of the item/curriculum assignment.

16. Click Assign Learning.

**Assign Learning**

**Confirm Details**

**Items and Curricula**

Title	Type	Assignment Type	Assign Date	Required Date
Account Planning, Development, and Growth.		REQ	4/10/2012	4/30/2012

**Employees**

Name

Sharp, Darlene,  
Thompson, Alexander,  
Max, Richard,

Back 16 Assign Learning Cancel

A confirmation message displays indicating successful assignment.

17. Click Close.

**Assign Learning**

**Successfully Assigned**

The items/curricula have been successfully added to the specified employees. If curricula were already assigned, they will not be re-assigned

17 Close

**Task C. Remove Items from an Employee’s Learning Plan**

1. From the Learning page, click the My Employees tab.

2. Click the Assign/Remove Learning Supervisor Link.

3. Click Remove Assigned Learning.
4. Click Continue.

Note: The Remove Items option will not remove items assigned to a user through a curriculum or by an administrator.

### Assign Learning

Select the action you would like to take:



**Assign Learning**  
Assign items and curricula to one or more employees.

3


**Remove Assigned Learning**  
Remove assigned items from one or more employees. Curricula and administrator-assigned items cannot be removed.

4
Continue
Cancel

5. Click the Items Add icon (+).

## Remove Assigned Learning

### Enter Learning Activity Details

\* Required

Items + 5

There are no items selected.

Employees +

There are no employees selected.

Back
Continue
Cancel

6. Enter keywords to search for the item to remove from the employee's To-Do List.
7. Use the checkboxes to further filter your search.
8. Click Search.

### Search for Items

X

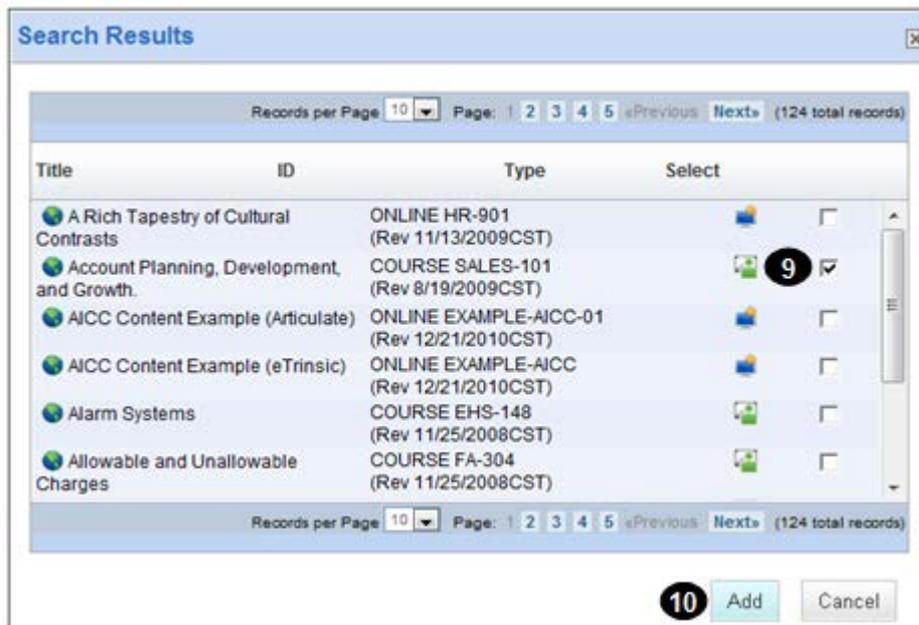
Keywords:  6

Instructor-Led
  Online
  Blended
  Other

Exact Phrase
  Search All Languages 7

Search
Cancel

9. From the search results list, click the check the **Select** checkbox.
10. Click **Add**.



11. Click the Employees Add icon (+).

## Remove Assigned Learning

### Enter Learning Activity Details

\* Required

[-] Items +

Title	Type	Remove
Account Planning, Development, and Growth.		

[-] Employees + 11

There are no employees selected.

Back
Continue
Cancel

12. Click the checkboxes next to the employees you want to remove the item from.
13. Click **Add**.

**Note:** Click the **Quick Select** icon (⬇️) to simultaneously select all direct and/or indirect reports for the corresponding employee.



Name	<input type="checkbox"/> Select All	Quick Select
Marcus Q Hoff		↓
Alexander Thompson	<input checked="" type="checkbox"/>	
Darlene Sharp	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Richard Maxx	<input checked="" type="checkbox"/>	↓
Sid Mormony	<input type="checkbox"/> 12	

13 Add Cancel

14. Click Continue.

## Remove Assigned Learning

### Enter Learning Activity Details

\* Required

[-] Items +		
Title	Type	Remove
Account Planning, Development, and Growth.		
[-] Employees +		
Name	Remove	
Sharp, Darlene,		
Thompson, Alexander,		
Maxx, Richard,		

Back 14 Continue Cancel

Review and confirm the details of the item removal.

15. Click Remove Learning.



## Remove Assigned Learning

### Confirm Details

Items	
Title	Type
Account Planning, Development, and Growth.	

Employees
Name
Sharp, Darlene,
Thompson, Alexander,
Maxx, Richard,

15

A confirmation message is displayed.

16. Click Close.

### Remove Assigned Learning

#### Successfully Removed

Assigned learning has been successfully removed from the specified employees. Only incomplete and free-floating items (those not associated with curricula) were removed.

16

**Task D. Record Item Completion for an Employee**

1. From the Learning page, click the My Employees tab.



2. Hover over an employee in the employee tree.

3. Navigate to and click the Record Learning link.



4. Click the Item Add icon



**Record Learning**

**Enter Item Details**  
\* Required

Item  **4**

No item selected.

Employees 

Name	* Grade	Costs	Comments	Remove
Maxx, Richard				

Continue Cancel

5. Enter keywords to search for the item to record completion for your employees.
6. Use the checkboxes to further filter your search.
7. Click Search.

8. From the search results list, click the Select link.

Title	ID	Type	Select
Account Planning, Development, and Growth.	COURSE SALES-101 (Rev 8/19/2009 1316 CST CST)		<a href="#">Select</a>
American Sign Language	COURSE HR-119 (Rev 11/25/2008 0800 CST CST)		<a href="#">Select</a> <b>8</b>
Benefits	COURSE HR-300 (Rev 11/25/2008 0800 CST CST)		<a href="#">Select</a>
Budgeting	COURSE FA-302 (Rev 11/25/2008 0800 CST CST)		<a href="#">Select</a>
Business Communication Simulation	COURSE HR-120 (Rev 11/25/2008 0800 CST CST)		<a href="#">Select</a>
Business Ethics	COURSE HR-107 (Rev 11/25/2008 0800 CST CST)		<a href="#">Select</a>

9. Enter all the item details.
10. Select a Grade/ Completion Status for the employee from the drop-down menu.
11. Click Continue.

**Note:** Click **Assign Defaults** to assign a default grade/completion status, comments, user costs, and currency to all employees selected.



### Record Learning

#### Enter Item Details

\* Required

Item: American Sign Language (HR-119) Rev 11/25/2008 0800 CST [Change Item](#)

\*Completion Date: 4/11/2012 **9** Total Hours:

\*Completion Time: 1132 Contact Hours:

\*Time Zone: Select CST Credit Hours:

Instructor ID:  CPE:

Instructor Name:

**Employees** [Assign Defaults](#)

Name	Grade	* Completion States	Costs	Comments	Remove
Max, Richard	<b>10</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**11** [Continue](#) [Cancel](#)

Confirm the record learning details.

12. Click Record Learning.

### Record Learning

#### Confirm Learning Details

Item: COURSE HR-119 Rev 11/25/2008 0800 CST

Completion Date: 4/11/2012 Total Hours:

Completion Time: 1132 CST Contact Hours:

Instructor: Credit Hours:

CPE:

**Employees**

Name	Grade	Completion Status	Comments	Costs	Amount
Richard Maxx		COURSE-PASS			

[Back](#) **12** [Record Learning](#) [Cancel](#)

Learning is successfully recorded for the listed employees.

13. Click Close.

### Record Learning

#### Recording Status

**Learning Recorded Successfully**

Item: COURSE HR-119 Rev: 11/25/2008 0800 CST

- Maxx, Richard [File Attachments \(0\)](#)

**13** [Close](#)