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

- Items and Curricula

- Employees

There are no items or curricula selected.

There are no employees selected.

[Back] [Continue] [Cancel]
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.

![Search for items and Curricula](image)

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

![Search Results](image)

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

The selected employees are listed.
15. Click **Continue**.
16. Click **Assign Learning**.

A confirmation message displays indicating successful assignment.

17. Click **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.

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**Assign Learning**

Select the action you would like to take:

3. **Remove Assigned Learning**

4. **Continue**

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5. Click the Items **Add** icon (+).  

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**Remove Assigned Learning**

**Enter Learning Activity Details**

* Required

- **Items**

  There are no items selected.

- **Employees**

  There are no employees selected.

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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**.
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
- Employees

There are no employees selected.

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.
14. Click Continue.

Remove Assigned Learning

Enter Learning Activity Details
* Required

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
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</tr>
</thead>
<tbody>
<tr>
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<table>
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</tr>
<tr>
<td>Maxx, Richard,</td>
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</table>

Review and confirm the details of the item removal.

15. Click Remove Learning.
A confirmation message is displayed.

16. Click Close.
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 (+).
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.

![Search for Items](image)

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

![Search Results](image)

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.
Confirm the record learning details.

12. Click Record Learning.

Learning is successfully recorded for the listed employees.

13. Click Close.