Job Aid: Managing Subordinates' To-Do Lists

Purpose

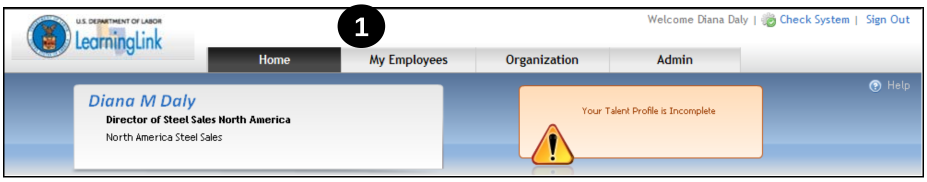
The purpose of this job aid is to guide supervisor users through the step-by-step process of managing subordinates' To-Do Lists within LearningLink.

Task A
View a Subordinate's To-Do List
3 Steps

Task B
Assign Items to a Subordinate's To-Do List – 16 Steps

Task C
Remove Items from a Subordinate's To-Do List – 17 Steps

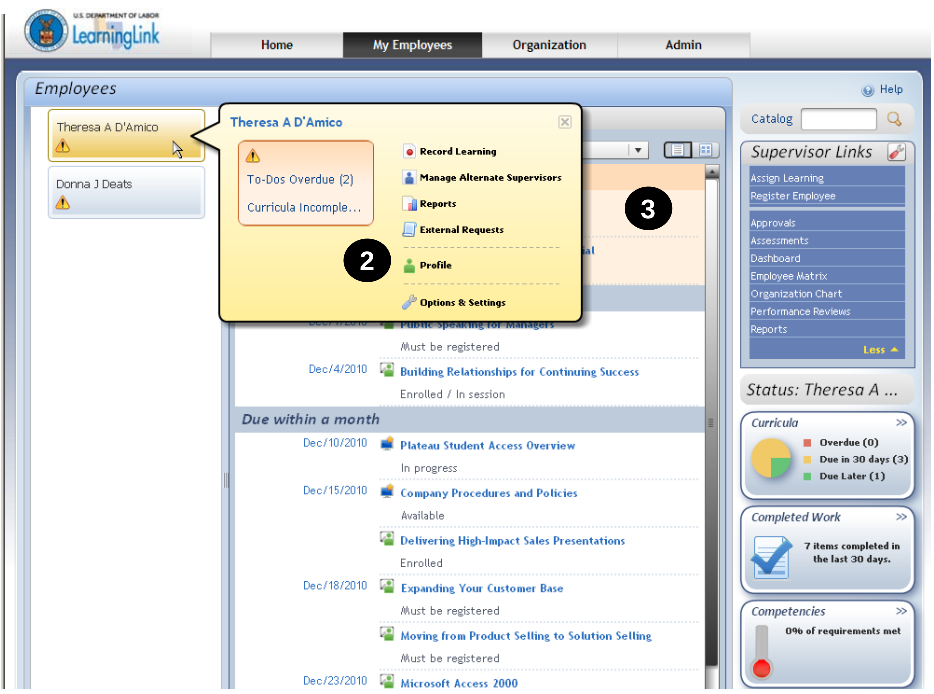
Task D
Record Item Completion for a Subordinate
18 Steps

	Task A.	**View a Subordinate's To-Do List**
1	From the Home page, select the **My Employees** tab.	

Use the employee tree to view the To-Do List of direct and indirect reports.

2 Hover over an employee card to perform the available actions without loading the user's To-Do List.

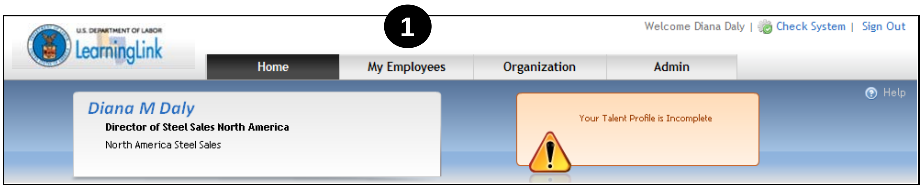
3 When you select an employee card, that user's To-Do List is displayed.



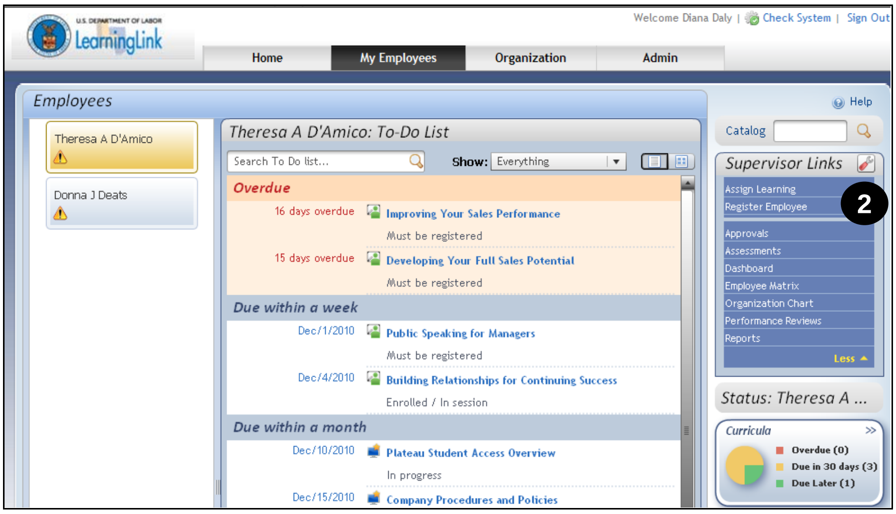
Note: *You may customize the view by filtering the* ***To-Do List*** *to show Learning only, Registrations, etc.*

Task B. Assign Items to a Subordinate's To-Do List

1 From the Home page, select the **My Employees** tab.

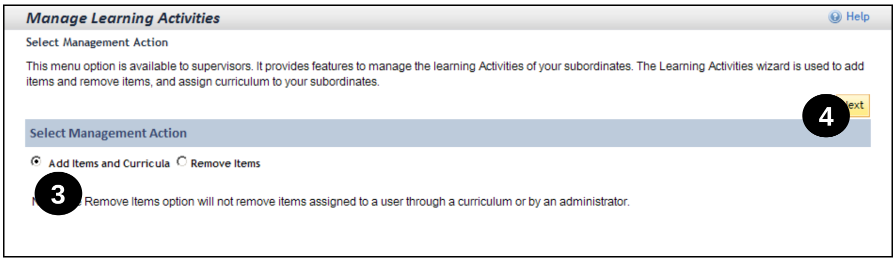


2 Select the **Assign Learning** easy link.



3 Select the **Add Items and Curricula** radio button.

4 Select **Next**.



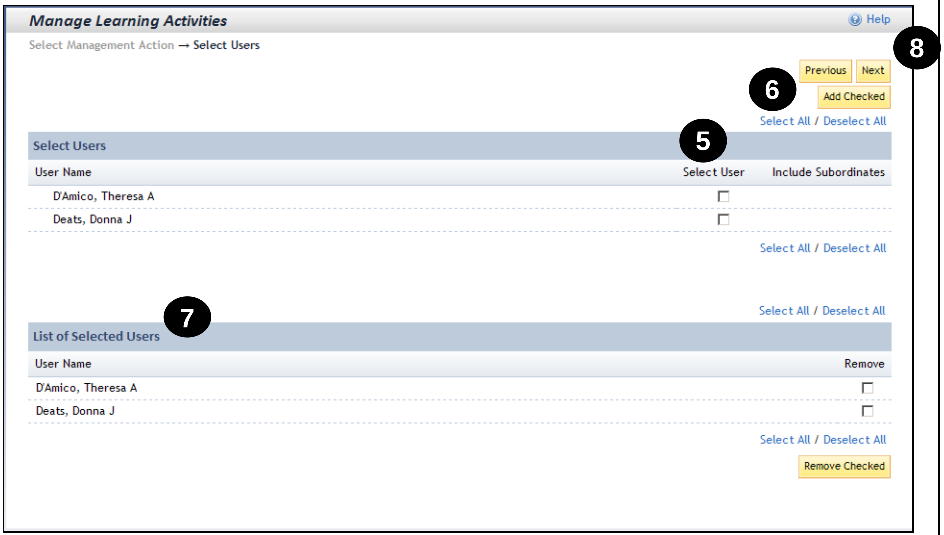
5 Check the **Select** checkbox next to the corresponding subordinate(s) to assign an item.

Note: *If a user has subordinates, you can select the* ***Include Subordinates*** *checkbox to assign the item to those users as well.*

6 Select **Add Checked**.

7 Review the list of selected users.

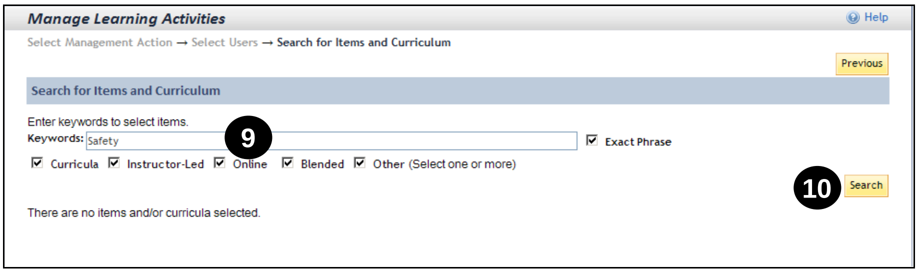
8 Select **Next**.



Search for the item(s) to add.

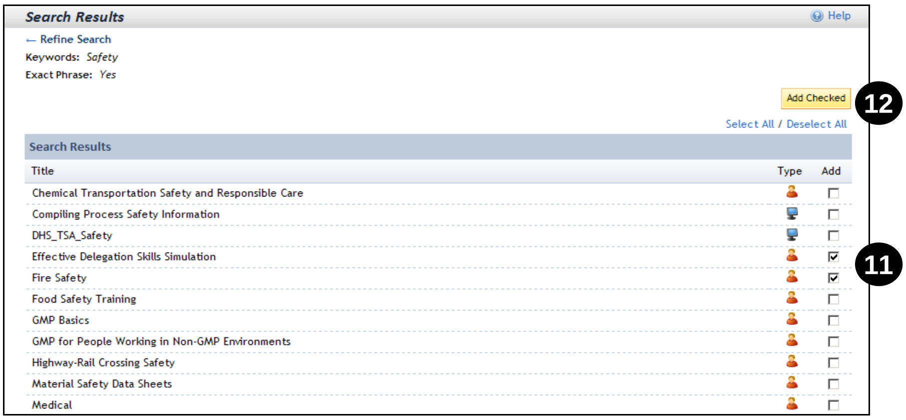
9 Enter keywords in the **Keywords** text field.

10 Select **Search**.



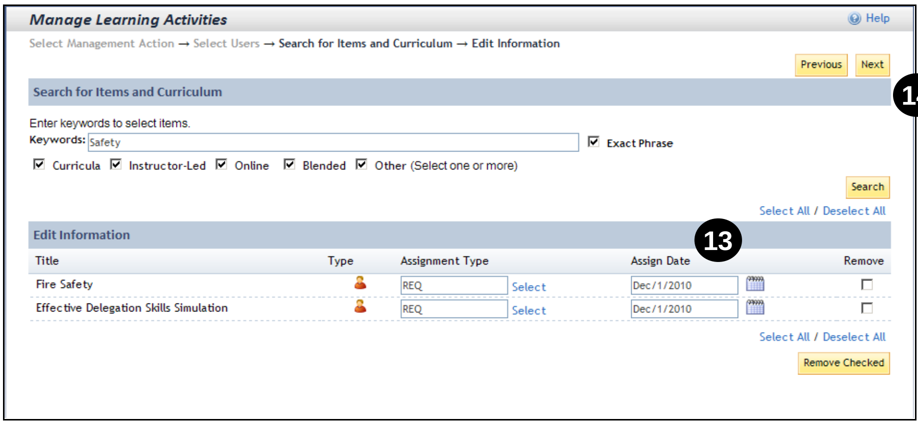
11 Add items by checking the corresponding **Add** checkboxes.

12 Select **Add Checked**.

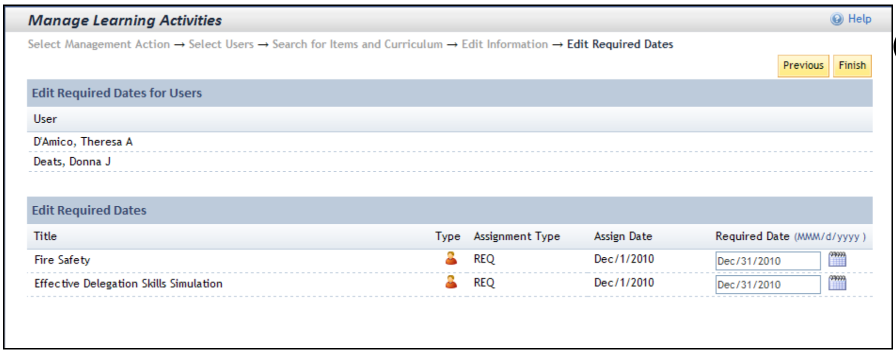


13 Edit the *Assignment Type* and *Assign Date* as needed.

14 Select **Next**.

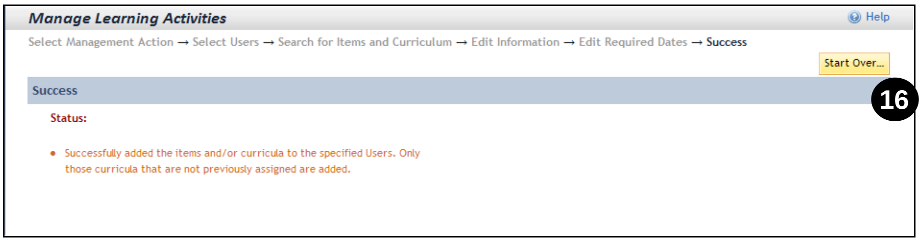


15 Select **Finish**.



A status message displays indicating successful assignment.

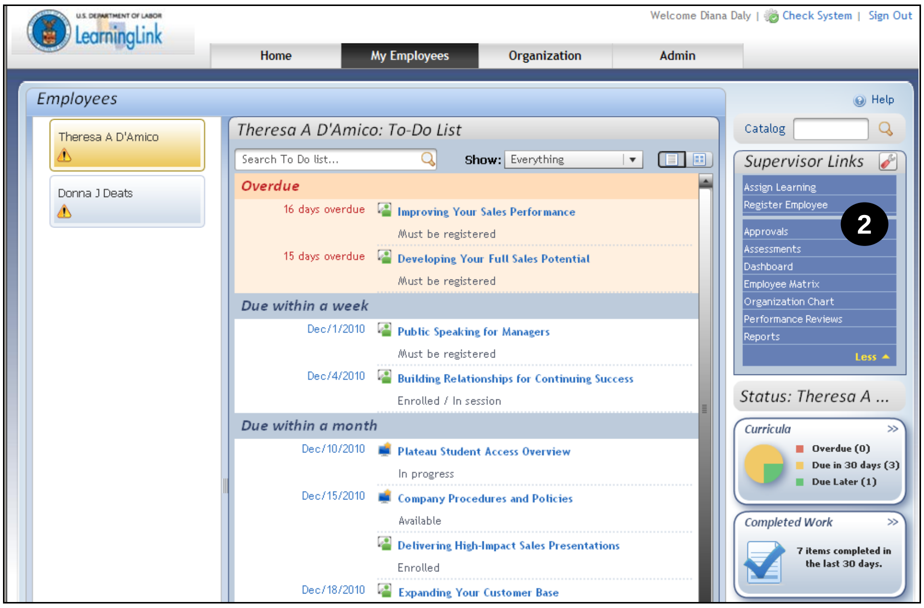
16 Select **Start Over** to add additional items or curricula to the selected subordinates.



Task C. Remove Items from a Subordinate's To-Do List

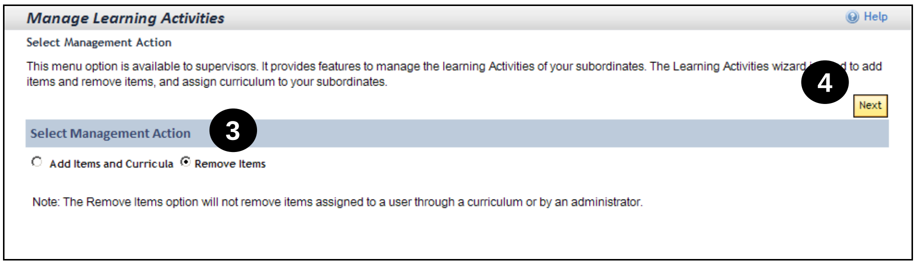
1 From the Home page, select the **My Employees** tab.

2 Select the **Assign Learning** easy link.



3 Select the **Remove Items** radio button.

4 Select **Next**.



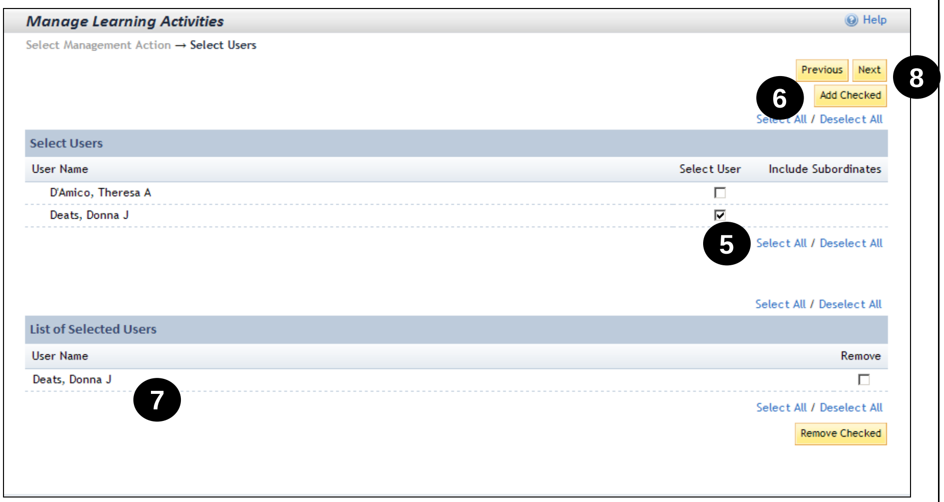
Note: *The* ***Remove Items*** *option will not remove items assigned to a user through a curriculum or by an administrator.*

5 Check the **Select User** checkbox next to the corresponding subordinate to remove an item from his or her To-Do List.

6 Select **Add Checked**.

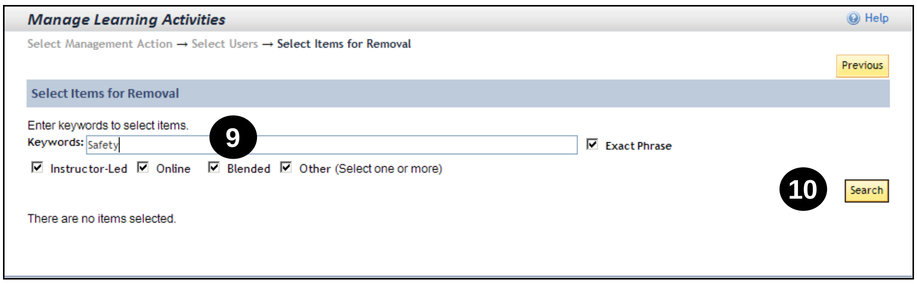
7 Review the list of selected users.

8 Select **Next**.



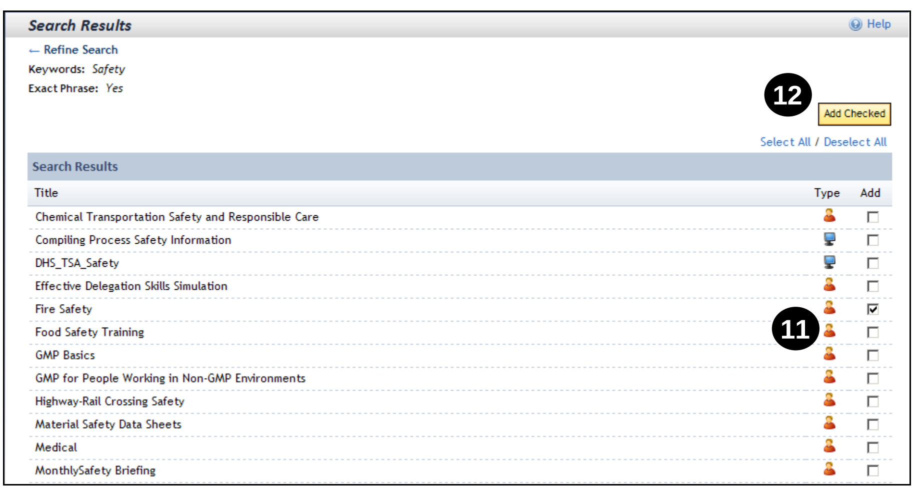
9 Search for the item(s) to remove. Enter keywords in the **Keywords** text field.

10 Select **Search**.



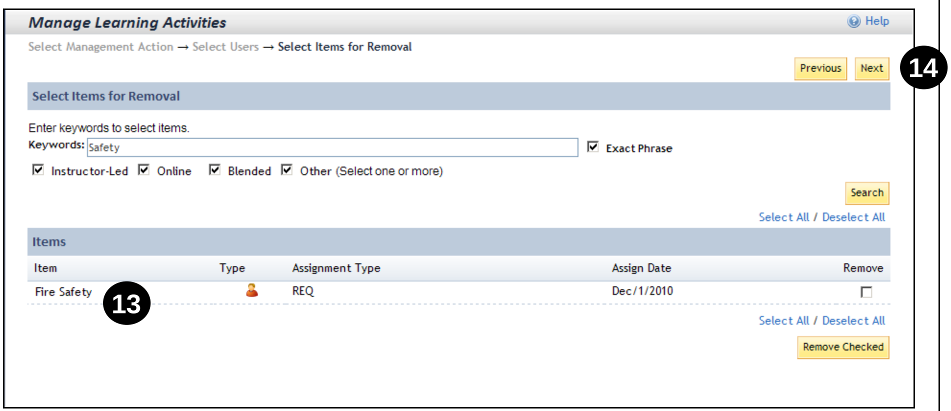
11 Select the items to remove by checking the corresponding **Add** checkboxes.

12 Select **Add Checked**.



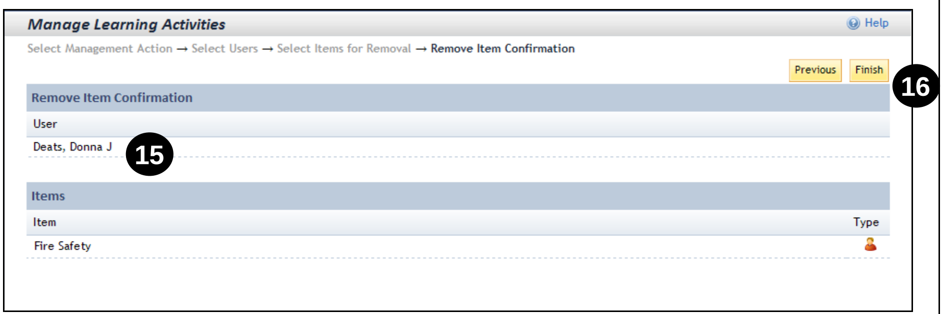
13 Review the item(s) selected to be removed.

14 Select **Next**.



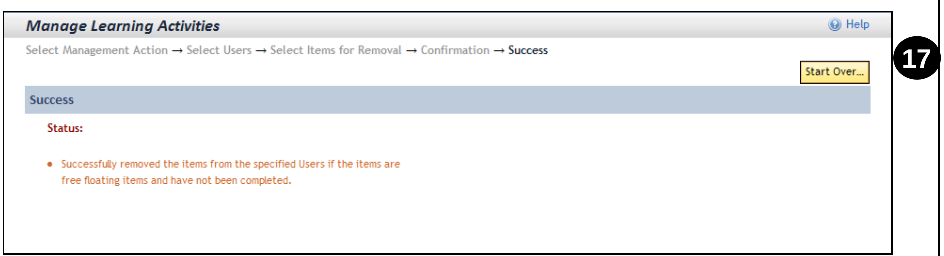
15 Review user and item selections.

16 Select **Finish**.



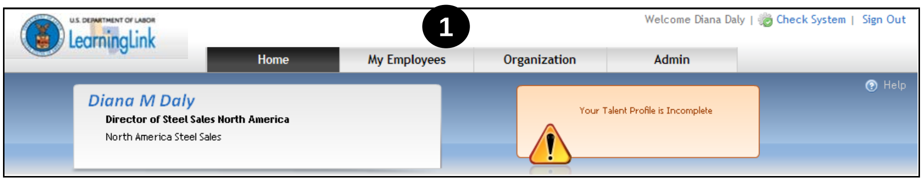
A status message appears indicating successful removal of the item(s).

17 Select **Start Over…** to remove additional items from the selected subordinates' learning plans.

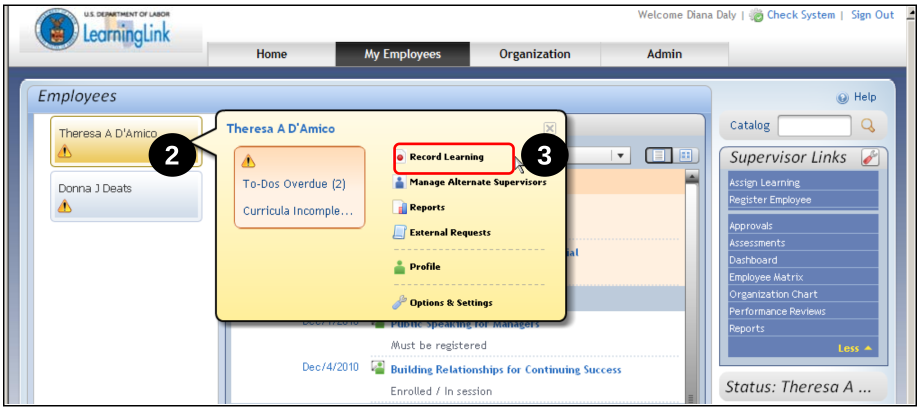


Task D. Record Item Completion for a Subordinate

1. From the Home page, select the **My Employees** tab.



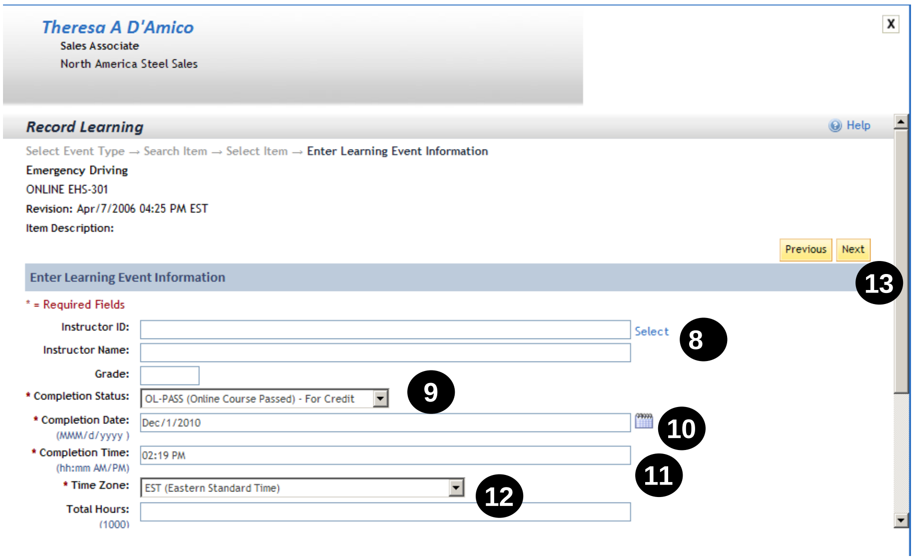
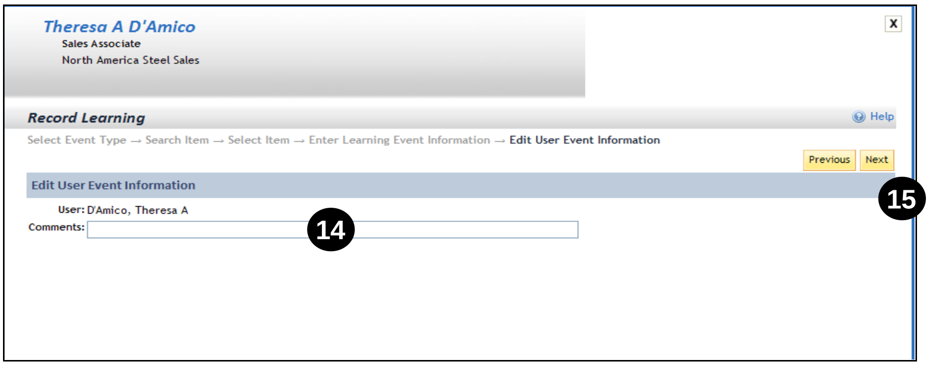
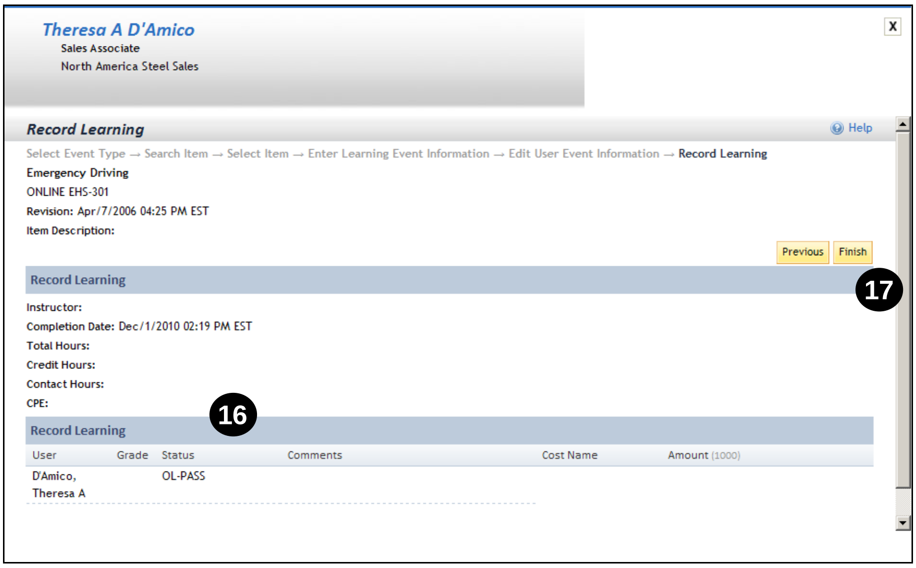
2. Hover over an employee in the employee tree.
3. Navigate to and select the **Record Learning** link.



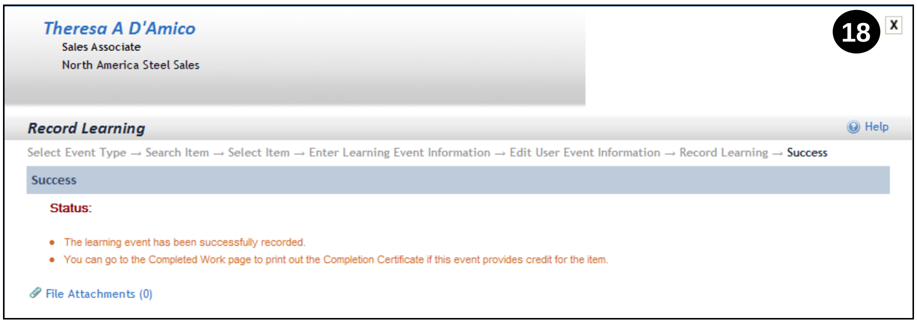
4. Enter keyword(s) to search for an item.
5. Select **Next**.

Note: *Results will depend on catalog access.*

6. Select the radio button for the item to be recorded.
7. Select **Next**.

 8 9 10 11 12 13	Enter learning event information. Select an instructor. Select a completion status. Enter/change the learning completion date. Enter/change the learning completion time. Select the time zone from the drop-down menu. Select **Next**.	
14 15	Enter comments in the text box, if applicable. Select **Next**.	
16 17	Verify the information. Select **Finish**. ***Note:*** *If an E-Signature is required to record the event, the E-Signature page displays. Enter your user name and E-Signature PIN in the corresponding text boxes. Select* ***Confirm****.*	

<table>
<tr>
<td>18</td>
<td>A status message displays indicating the learning event has been successfully recorded.

When you are finished recording learning for a subordinate's record, close the dialog window by selecting the close button (X) to return to your own session.</td>
<td>
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Notes