



City of Minneapolis

PeopleSoft HCM/ELM v9.2 Upgrade

**ENTERPRISE LEARNING MANAGEMENT
MANAGER SELF-SERVICE:
STEP-BY-STEP INSTRUCTIONS**

ELM-MSS

Created on 6/8/2016 8:20:00 AM

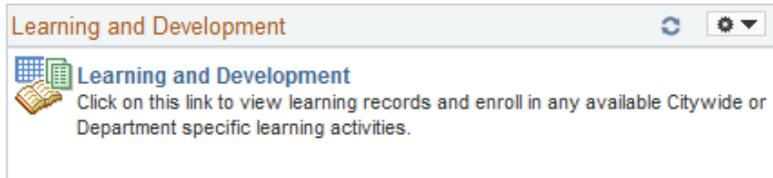


Table of Contents

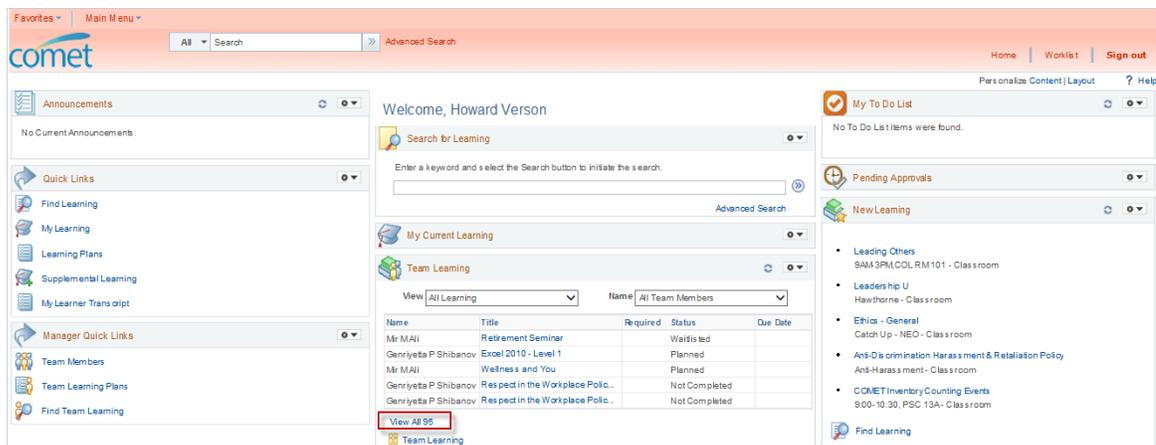
ELM – Manager Self-Service	1
View All Learning for Direct Reports	1
Supplemental Learning Approval for Direct Reports	4
View Learning Plans for Direct Reports	6
Team Members.....	8
Find and Enroll Direct Reports in Classes	11

ELM – Manager Self-Service

View All Learning for Direct Reports



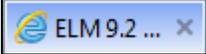
Menu Path: From the COMET 'home' page, select the Learning and Development link.



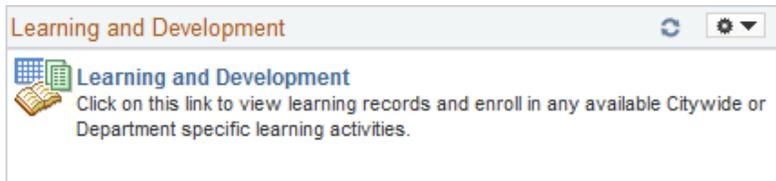
Procedure

Step	Action
1.	<p>At the bottom of the Learning and Development page under the Team Learning section, managers can view all Team Member learning by selection the View All link (View All ##, where ## represents the number of Team Member learnings.</p> <p>Managers can download Team Member learnings into an Excel spreadsheet. These instructions will show how to perform that task.</p> <p>Click the View All ## link.</p> <p>View All 100</p>
2.	<p>The Learning pop-up window displays.</p> <p>Click the View list.</p> <p>All Learning</p>

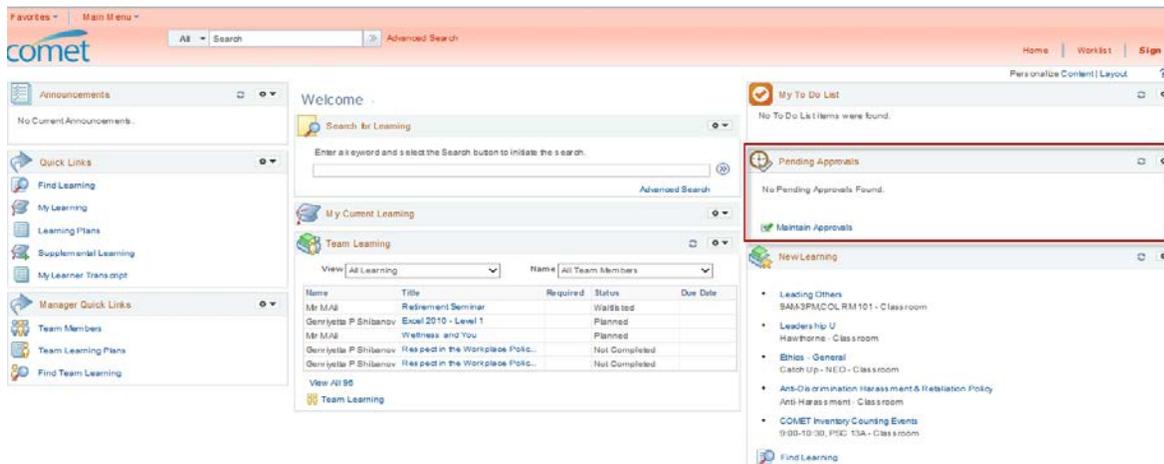
Step	Action
3.	<p>Managers can filter this view by selecting either the "All Learning" view (default view) or the "Required Learning" view. This example will display the "Required Learning" view first.</p> <p>Click the Required Learning list item.</p> 
4.	<p>Required Learnings (if any) are displayed.</p> <p>Click the Return object.</p> 
5.	<p>Click the View list.</p> 
6.	<p>In this example, select "All Learning" to view learnings for all team members.</p> <p>Click the All Learning list item.</p> 
7.	<p>Click the Name list.</p> 
8.	<p>Learning can be filtered by each team member listed in the "Name" drop-down list box, as is the "All Team Members" option (default).</p> <p>Click the All Team Members list item.</p> 
9.	<p>The Download icon will start the process of downloading learnings, based on the "View" and "Name" filter settings, into Excel.</p> <p>Click the Download button.</p> 
10.	<p>A Windows Explorer message displays. Select the Open button to open the file in Excel.</p> <p>Click the Open button.</p>
11.	<p>The download opens in Excel, containing each Team Member's learnings. The spreadsheet can be printed or saved to a file, before closing the file.</p> <p>Click the 'X' in the Excel spreadsheet to close the object.</p> 

Step	Action
12.	Return to your Learning and Development browser session. Click the ELM 9.2 DEV tab. 
13.	From the Learning pop-up window, scroll towards the bottom and click on the Return button. Click the Return button. 
14.	End of Procedure.

Supplemental Learning Approval for Direct Reports



Menu Path: From the COMET 'home' page, select the Learning and Development link.

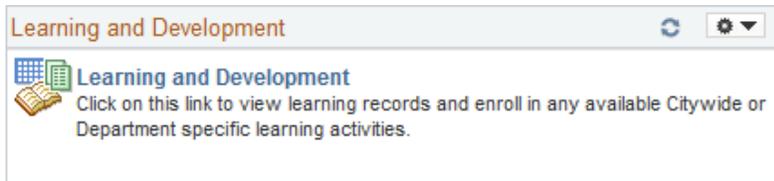


Procedure

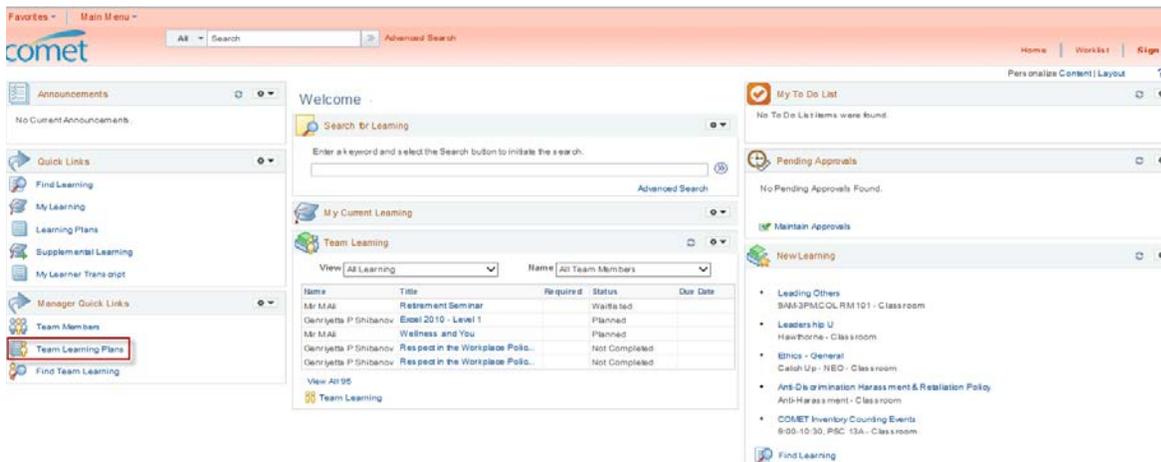
Step	Action
1.	<p>On the Learning and Development home page, Supplemental Approval can be found under the Pending Approvals section in the center of the page.</p> <p>Under the Title column, select the class pending approval for the direct report. In this example, Halogen Conference was selected.</p> <p>Click the Halogen Conference link.</p> <p>Halogen Conference</p>

Step	Action
2.	<p>Approval Details for the supplemental learning selected are displayed in the pop-up window under the Supplemental Learning Details section. Details include:</p> <ul style="list-style-type: none"> * Title * Description * Status * Type * Start Date * End Date * Location * Study Hours * Price * Education Units * Provided By * Instructor/Facilitator
3.	<p>In this example, the "Submit", "Approve" or "Deny" buttons are not selected. This learning will be approved from the Learning and Development home page.</p> <p>Click the Close button.</p> 
4.	<p>On the Learning and Development home page, under the Pending Approvals section, the pending approval for a direct report's learning can be Approved (by selecting the Approve icon) or Denied (by selecting the Deny icon).</p> <p>Click the Approve button.</p> 
5.	<p>End of Procedure.</p>

View Learning Plans for Direct Reports



Menu Path: From the COMET 'home' page, select the Learning and Development link.



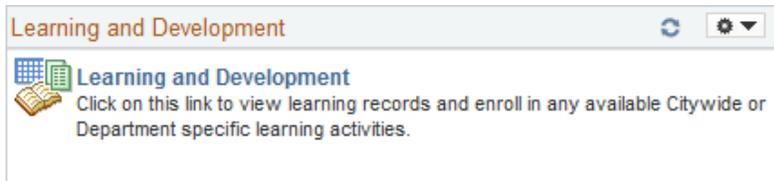
Procedure

Step	Action
1.	<p>On the Learning and Development home page, the Team Learning Plans link can be found under the Manager Quick Links section on the left-side of the page.</p> <p>Click the Team Learning Plans link.</p> <p>Team Learning Plans</p>
2.	<p>The Team Learning Plans page displays Team Member Learning Plans. Select a Learning Plan (My Learning Plan) under the Title column for a direct report.</p> <p>Click the My Learning Plan link.</p> <p>My Learning Plan</p>
3.	<p>The Learning Plan Details page displays a list of courses under the Learning Plan Details section for the direct report selected.</p> <p>Click the Priority list.</p> <p>Low</p>

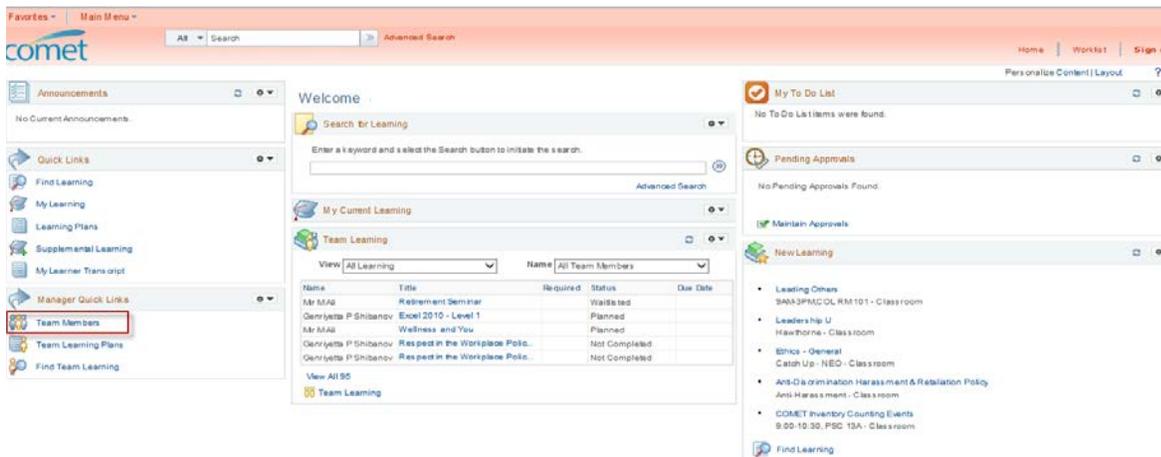


Step	Action
4.	Valid priorities include High, Low (default) and Medium. For this example, High is selected. Click the High list item. 
5.	Save any changes to the Learning Plan Details . Click the Save button. 
6.	Click the Learning Home link.
7.	End of Procedure.

Team Members

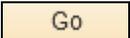
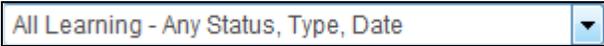
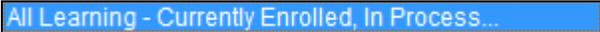


Menu Path: From the COMET 'home' page, select the Learning and Development link.



Procedure

Step	Action
1.	<p>On the Learning and Development home page, the Team Members link can be found under the Manager Quick Links section on the left-side of the page.</p> <p>Click the Team Members link.</p> 
2.	<p>The Team Members page displays. Team Members are listed under the Direct Reports - <Manager Name> section. Select the Action drop-down list box for a direct report.</p> <p>Click the Action list.</p> 

Step	Action
3.	<p>Actions include:</p> <ul style="list-style-type: none"> * Learning Plans * Supplemental Learning * Team Learning <p>For this example, Team Learning is selected.</p> <p>Click the Team Learning list item.</p> 
4.	<p>Click the Go button.</p> 
5.	<p>Learning is displayed for the direct report under the Team Member Learning section. Select the drop-down list box to display Search Filters.</p> <p>Click the Search Filter list.</p> 
6.	<p>Valid Search Filters for Team Learning include:</p> <ul style="list-style-type: none"> * All Learning - Any Status, Type, Date (default) * All Learning - Completed * All Learning - Currently Enrolled, In Process * All Learning - Within Last Month * All Learning - Within Last Year * Supplemental - Continuing Education Only * Supplemental Only - All <p>For this example, "All Learning - Currently Enrolled, In Process" is selected.</p> <p>Click the All Learning - Currently Enrolled, In Process... list item.</p> 
7.	<p>Click the Go button.</p> 
8.	<p>Team Learning is displayed for the direct report, based on the selected filter.</p> <p>Click the For list.</p>
9.	<p>Select another direct report or "All Learners" to view their Team Learning.</p> <p>Click the <Direct Report> list item.</p>
10.	<p>Click the Go button.</p> 

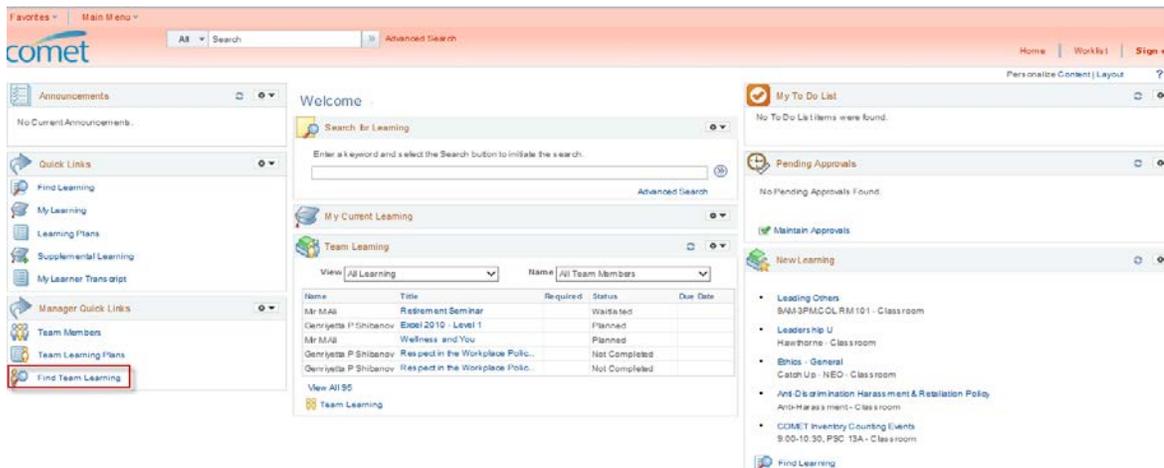


Step	Action
11.	Team Learning is displayed for the direct report selected. Click the Learning Home link.
12.	End of Procedure.

Find and Enroll Direct Reports in Classes



Menu Path: From the COMET 'home' page, select the Learning and Development link.



Procedure

Step	Action
1.	On the Learning and Development home page, the Find Team Learning link can be found under the Manager Quick Links section on the left-side of the page. Click the Find Team Learning link. Find Team Learning
2.	The Find Learning page displays. Search results can be narrowed by performing a search using a keyword. Click in the Search by Keyword field.
3.	Enter the desired information into the Keyword field. Example: ergonomics . Enter a word (e.g. "ergonomics") or a partial word followed by an asterisk (e.g. "ergo*").
4.	Press [Enter] .

Step	Action
5.	<p>A search result is returned. Scroll down the page to find the desired learning. Select the Enroll button next to the desired class to begin the enrollment process.</p> <p>Click the Enroll button.</p> 
6.	<p>Under the Team Members section of the Team Members page, select the checkbox for the employee you'd like to enroll.</p> <p>Click the Checkbox option.</p> 
7.	<p>Select the checkbox for any additional direct reports to be enrolled. To enroll all team members, click on the Select All checkbox.</p> <p>Click the Checkbox option.</p> 
8.	<p>Click the Go button.</p> 
9.	<p>The Enroll in Class page displays.</p> <p>Click the Submit Enrollment button.</p> 
10.	<p>Enrolled team members are listed in the Enroll Learners section, with columns listing a Confirmation ID, Messages and Go to Class Progress.</p> <p>A confirmation e-mail will be sent to the enrolled learners within 15 minutes of enrollment.</p>
11.	<p>Click the Learning Home link.</p>
12.	<p>End of Procedure.</p>