MANAGER MANUAL

MANAGER GUIDE

Manager reviews the Team tab in MyLearning and learns how to take specific actions on the subordinates

Manager role in MyLearning explanation ........................................................................................................................................... 2
Check Direct & Virtual Reports enrollments .................................................................................................................................. 3
Add & view External Training (certificate) of your subordinate ...................................................................................................... 6
Assign training for your subordinate ................................................................................................................................................... 8
View & print subordinate's certificate ............................................................................................................................................... 10
My Approval – External Training certificates management ............................................................................................................ 12
Changes notes ......................................................................................................................................................................................... 13
Manager role in MyLearning explanation

Direct Reporting

As an Internal ABB User, the data about your Manager role and subordinated employees is inherited from HR Feed. Hence, it is not necessary to fulfill any request. As the Manager at any level, you should be able to display all the Users that report to you right away after logging in to MyLearning. You can manage their learning directly from the Team tab (following instructions below describe all the actions that you can perform as the Manager in MyLearning).

1 NOTE: In case you wouldn’t be able to display the Team tab in MyLearning, we highly recommend to clear the cookies & cache data in your browser and try to access this tab one more time before reaching our Support Team.

2 NOTE: In case of some subordinated Users would be missing in your Team tab, please review the organizational details in your Outlook/Skype/Teams software. Depending on whether they are displaying properly for you there or not, please follow with AskHR (for general issue) or MyIS (for only MyLearning-related issue) ticket.

Virtual Reporting

MyLearning is also equipped with additional type of reporting called Virtual. Virtual reporting means that you can become the Manager (called Other Manager in the system) for any desired Users in MyLearning, e.g. if you would like to manage the training for particular group of external customers.

This type of access has to be requested via MyServices(IS) and might be gained even without being a Manager in organization structures. In order to receive the Other Manager role in MyLearning, please follow the steps from our MyLearning Support manual.

Refer to the section A. Access Requests and provide required details in your request such as:

- Role that you would like to obtain – Other/Virtual Manager
- Business reason/approvals – what is the legal basis of your request (e.g. you need to manage accounts of external company partner and it is agreed on both sides).
- Attach a file or type in the list of Users (or name of specific Learner Group created in MyLearning for that purpose) that you would like to become a Manager for

3 NOTE: Please note that Other Manager is only a name for the system feature that allows you to manage training assignment for defined Users. It doesn’t mean that you become the real manager of any User listed.
Check Direct & Virtual Reports enrollments

As a Manager, you are able to view additional Team tab that offers you Virtual and Direct Reports managing options. There is no difference between tracking & managing your Virtual and Direct Reports’ activities in the system.


2. Go to the Team tab.

3. Use Refine filters from the left Panel. Tick the Direct Report checkbox to filter your direct reports or Virtual Report to view other subordinates.

4. **NOTE:** You are also able to refine the results by Location or Country (this filtering possibilities will show up only if your reports come from different places).

4. Find the desired subordinate on the Team view listing and click on View Learning button next to the desired User.
5. **NOTE:** The only actions performed by subordinates in MyLearning that Managers are notified about refer to the Classroom trainings and pending orders. Managers are also notified about No-Show status marked by Instructor in Class for particular User.

6. **NOTE:** Recommended way to track subordinates’ enrollments for particular Class is to use Reports functionality. The Report name is: ABB BASIC: ENROLLMENTS BY MANAGER. You can find out more about using Reports in our REPORTS MANAGEMENT job aid.

5. Depending on the Classes and Training Plans enrollment status, you are empowered to decide on your subordinate’s enrollments.
   a. You can cancel the enrollment by clicking **Reject** (under Action column). It will cancel an active enrollment for the User. If you are sure that you want to cancel the enrollment, click **Yes** in the following pop-up window. Enrollment status will be changed to Canceled.
   
   ![Cancel enrollment pop-up](image)

   b. You can also force Completed status for particular enrollment. Simply unveil the drop-down next to **Reject** button and select **Mark Complete**.
System will ask you to provide the **Completion Date** the **Score (optional)**. Select **Apply** to proceed. In the following pop-up, click **Yes** to confirm your action.

**NOTE:** This option won’t be possible for Classes scheduled in the future.

**NOTE:** Completion Date cannot be past date.

c. You can also use change registered Class for particular User in order to switch the enrolled Class on his/her behalf. Simply unveil the drop-down next to Reject button and select **Change Class**.

System will list all the available Classes under particular Course. Pick the most suitng option for the User and click **Register**. In the following pop-up, select **Yes**.

**NOTE:** Manager can decide to cancel the enrollment if:

- there is no reason for particular subordinate to take the training which generates additional cost for BU
- PO number / Cost Center / Invoice number was incorrect in the order for particular priced Class
6. **View Learning** option enables you to check the session details for particular Virtual or Classroom Class. Simply select the down arrow next to particular title of a Class and the session details will be displayed for you.

![Image of View Learning](image)

Add & view External Training (certificate) of your subordinate

1. In the **Team** tab, locate the subordinate that you would like to view or add the new External Training for. You can use **Refine** filters from the left Panel. Tick the **Direct Report** box to filter your direct reports or **Virtual Report** to view the external subordinates.

2. Find the desired subordinate on the Team list and unveil the drop-down right next to **View Learning**. Click **View External Training**.

![Image of External Training](image)

3. New window with the list of User’s External Trainings added will show up. From this view, you are able to:
   a. **Edit** the currently existing External Training
   b. **Delete** currently existing External Training
   c. **Check the status and view** desired External Training
4. To upload new External Training for currently selected User, select **Add External Training**.

5. In the displayed pop-up window, please provide all the required details:
   a. **Type** of External Training: Training, License or Workshop
   b. **Title**
   c. **Issued by** – name of the issuer or organization
   d. **Certificate number** – if there is one
   e. **Completed on** – date of completion
   f. **Validity** – if the External Training validity should be limited in any way, e.g. will expire in one year
   g. **Upload Certificate** – upload the file with Learner’s Certificate (.pdf, .png, .jpg and .jpeg file formats accepted only)
   h. **Show to Others** – this functionality is not active for ABB, please skip it

**NOTE:** Mandatory fields are marked with red asterisk ‘*’.

6. Make sure that all the details are correct and **Submit** the external training. It might take a while for the system to load the file so please make sure not to close the window until the upload process is finished.
Assign training for your subordinate

1. In the **Team** tab, locate the subordinate that you would like to assign training for. You can use **Refine** filters from the left Panel. Tick the **Direct Report** box to filter your direct reports or **Virtual Report** to view the external subordinates.

2. Find the desired subordinate on the Team list and unveil the drop-down right next to **View Learning**. Click **Assign Learning**.

3. From the Assign Learning pop-up box, define the Class or Training Plan type. Click on the **arrow next to Any button** and select desired type of training.
4. Use the search bar to locate desired training. Provide Class or Training Plan title or code and click the magnifier icon. You need to provide at least 3 following characters to make the system auto-populate suggested objects.

5. Pick desired Class or Training Plan and click on Assign to register User for particular training. You can also decide if the assignment should be Mandatory for your subordinate by ticking the relevant checkbox.

6. In case of Training Plan with multiple Classes available under a Course, system will display another pop-up with the Class selection pane. Please pick the desired Class in each Mandatory Course available by selecting relevant radio button and click Done to proceed.
7. If there is the **Prerequisite** option available, simply click on it, select the displayed Course and Class from the expandable drop-down menu and proceed with **Assign**.

![Assign Learning screenshot](image)

8. Your subordinate is now enrolled for the desired Class or Training plan. You can check the status and manage the enrollments.

**NOTE:** Please be aware of that all the actions that you take on your reports will result in relevant notifications being sent to the User(s).

**View & print subordinate’s certificate**

As the Manager, you are allowed to view & download User’s completion certificate directly in the listed enrollments of specific subordinate view.

1. **Go to Team > Manage > My Team** and locate the relevant User on the Team listing. You can use Refine filters and search bar to find the desired subordinate more quickly.

2. **Select View Learning.**
3. On the assigned training list, you can notice the **View or Download Certificate** icon. You will be able to view the completion certificate only for already completed Classes or Training Plans of particular User.


4. The Certificate will be displayed in a separate pop-up window. In order to download it, simply proceed with **Convert to PDF** and save the file to the desired location on your computer.

**NOTE:** If particular Web-based or Video Class has the Recurring registration allowed Business Rule applied (which means that User can take and finish it multiple times), make sure that you are viewing the relevant Certificate of completion (check by displayed date).
5. Enter the saved file and select **Print** icon. Adjust the desired printing settings and simply print your certificate.

**NOTE:** The Certificate layout is oriented horizontally by default.

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My Approval – External Training certificates management

Next to the My Team, you can also notice the **My Approval** section of Team tab. My Approval is dedicated for managing all the requests from Managers’ subordinates that would like to upload External Training certificate/license/workshop to MyLearning via Profile tab (you can find more details in the PROFILE TAB job aid for the Learners).

In order to **Verify** or **Reject** specific pending External Training requested by your subordinate, you need to:
1. Go to Team > Manage > My Approval and locate the pending External Training that you would like to reject or approve for particular User.

![My Approval Table]

2. Click Verify if you are sure that the External Training certification is valid.

![My Approval Table]

3. Pick Reject if you think that the uploaded Certification does not meet required standards.

14 NOTE: You can peek at the uploaded document by clicking the relevant Certificate icon.

15 NOTE: Managers are also notified about pending verification External Trainings on their mailbox. It is possible to Verify/Reject particular Certificate right away through the link that is included in the notification.

Changes notes

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