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Learning Objectives

Learning Objectives

After completing this lesson you will be able to:

- **Viewing Using the AgLearn Supervisor Interface**
  - View the AgLearn record of one or more employees using the **My Employees** and the **Organization Chart**
  - View the AgLearn record of one or more employees using the **Team Navigator** icon
  - Toggle between your AgLearn record and that of a subordinate
- **Adding to the To-Do List**
  - **ASSIGN** a learning item to one or more subordinates
  - **REGISTER** one or more subordinates in an instructor-led course
- **Approval/Disapproval**
  - Approve or disapprove the **REGISTRATION** of one or more subordinates in an instructor-led course
  - Approve or disapprove the **EXTERNAL TRAINING REQUEST** (Standard Form 182) of a subordinate
  - Describe the routing steps involved in AgLearn's electronic approval of SF182 external training request submissions
  - State the pertinent fields of the SF182 form that will assist you in determining the suitability of the training request
- **Reports**
  - Run a report [Self, Direct Subordinates, or All Subordinates]

Viewing Using the AgLearn Supervisor Interface

My Employees

Figure 1 –My Employee's Tab

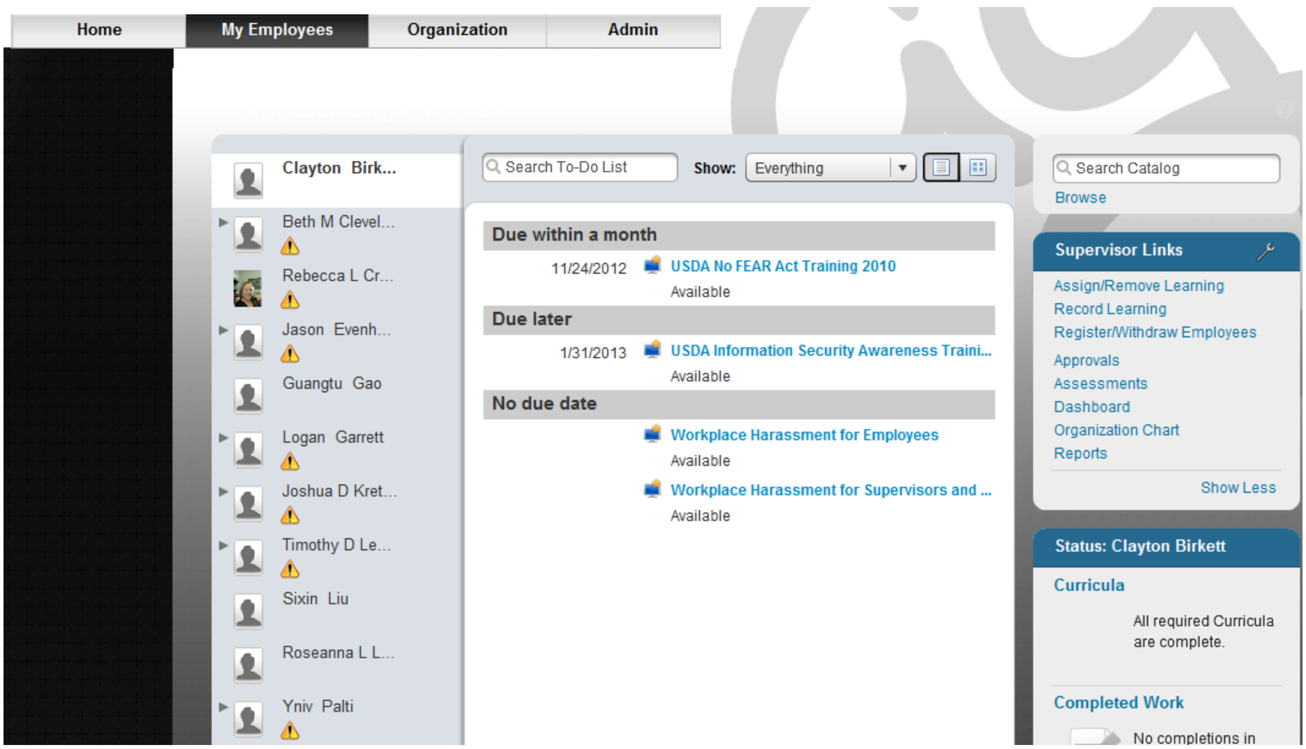


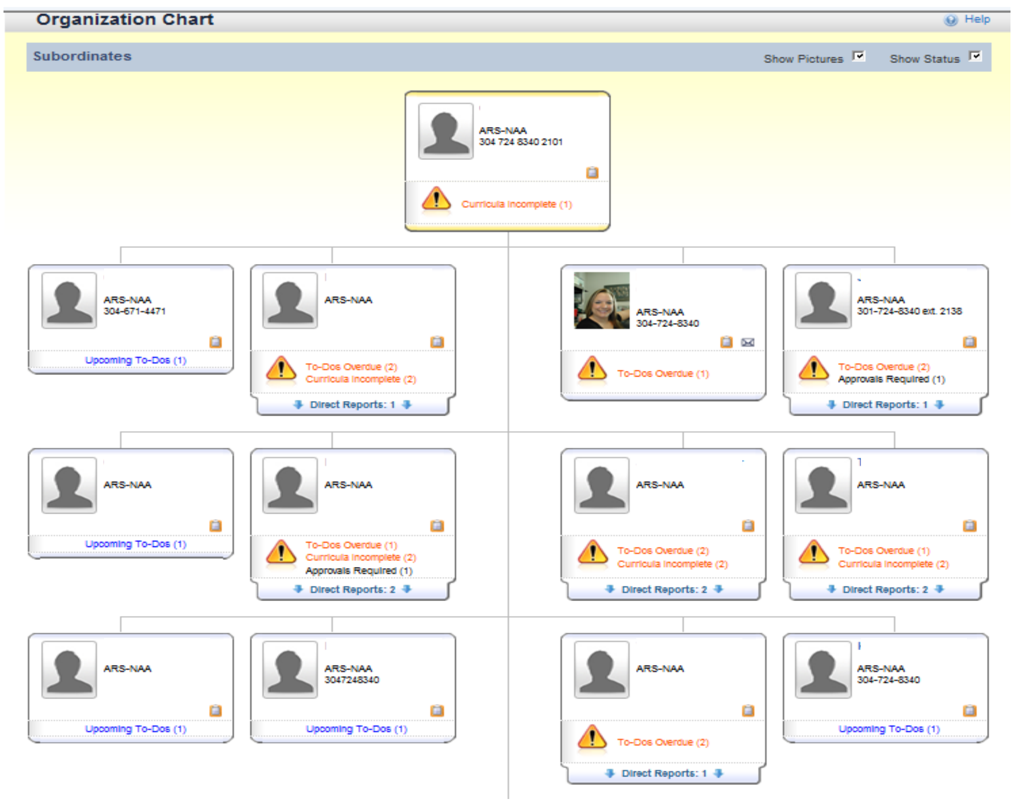
Figure 2 – My Employee's Tab, expanded

Use the **My Employee's tab** to view your employees. Click on the name of a direct report to display the **Home** screen for that subordinate. Once on the Home screen, you can quickly navigate to the To-Do List, IDP, Completed Work employee.

My Employees

Organization Chart

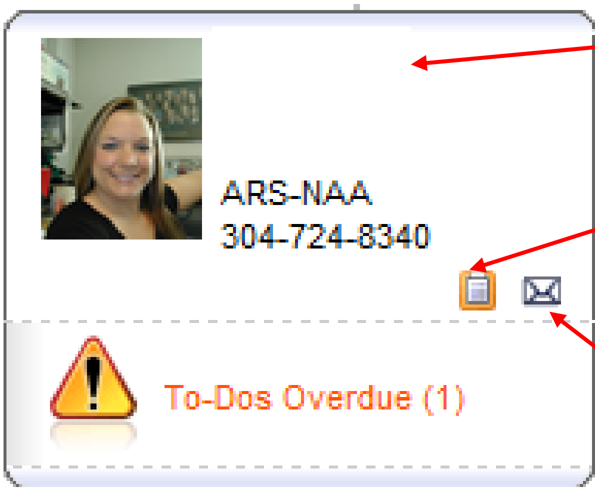
Selecting the **Organization Chart** link from the **Supervisor Links** will display an organizational chart of your employees. Any subordinates with direct reports will have this indicated on the chart.



NOTE

From the Organization Chart, you can also view the subordinates employee's by clicking the **Direct Reports** link to drill down one or more levels.

Organization Chart



Employee Name – Opens the **Profile,** you can view the employee information & phone number.

Snapshot – Opens the snapshot of the subordinate. All **To-Do List** learning items and Curriculum are listed.

Send Email – Opens a new email message within Microsoft Outlook.

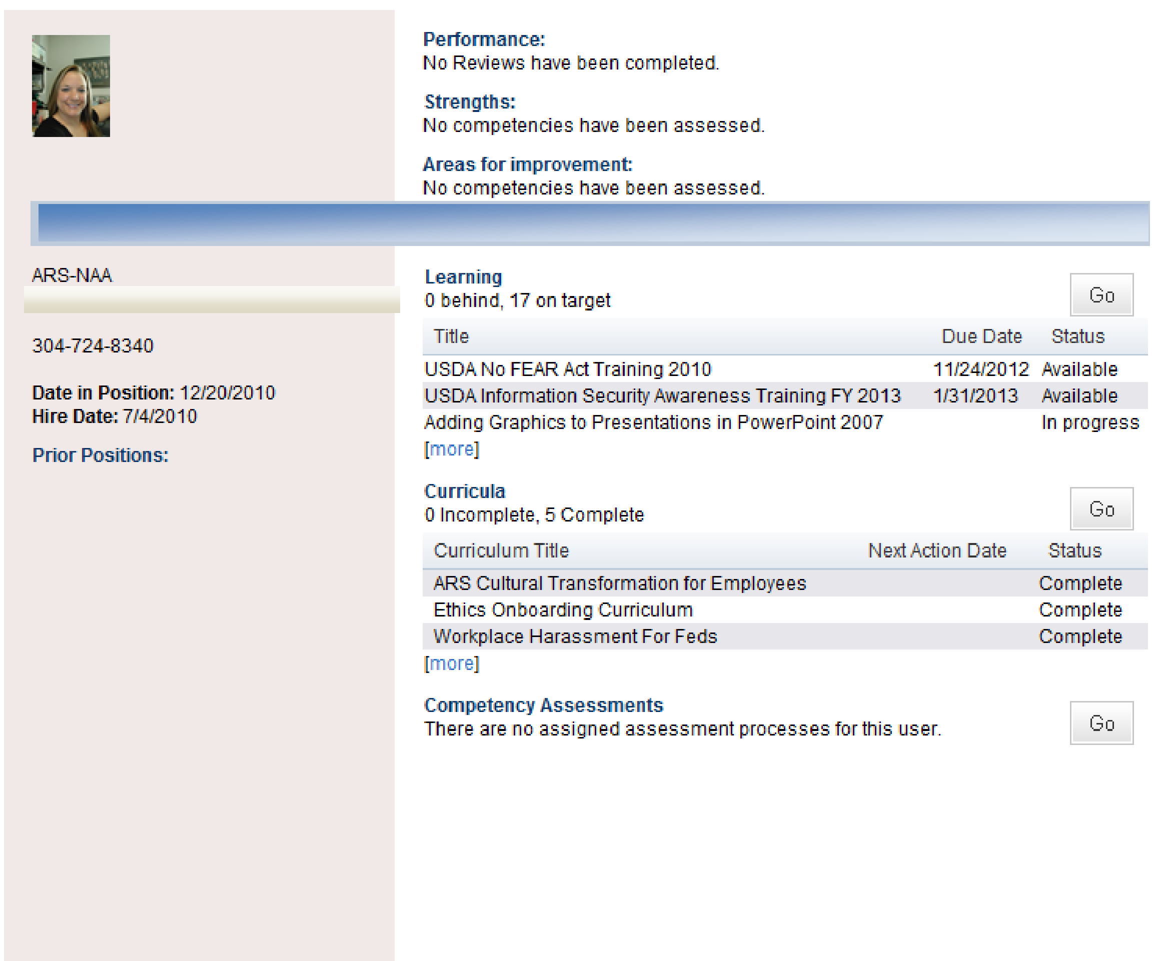
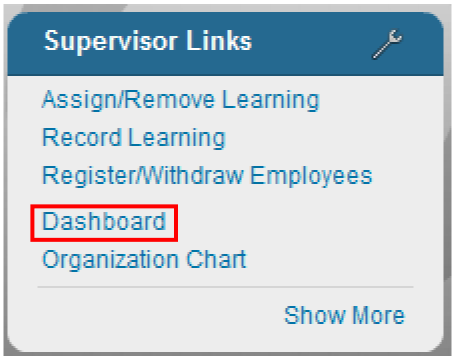


Figure 3 - Snapshot

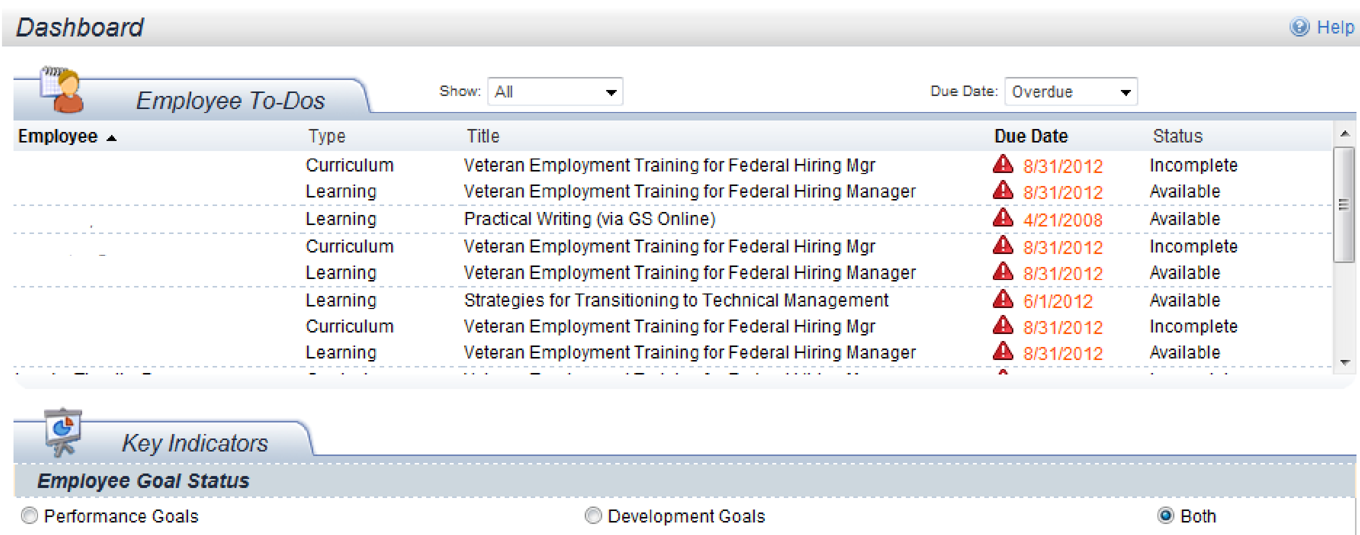
Dashboard



Selecting the **Dashboard** option from the **Supervisor Links** in the **My Employees** tab will display a listing of your direct reports. The Dashboard is divided into two sections: **Employee To-Dos** and **Key Indicators**.

The **Employee To-Do's** section has two filter options:

- **Show –** Choices are **All**, **Learning**, **Curricula**, **IDP Goals** & Assessments.
- **Due Date** – Choices are **Overdue**, **Next 30 days**, and **Next 60 Days**.



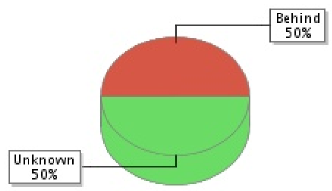
The **Key Indicators** section contains two subsections and its purpose is to inform you of the status of performance reviews and employee goals:

- **Performance Goals:** The Performance Goal section lists all of the performance reviews for your direct reports; therefore, you have a role in completing all of the performance reviews that are listed. This section also shows a graphical representation of the completion status of the *entire list* of performance reviews.
- **Development Goals:** The Development Goal Status section list all of the performance and development goals for all of your direct reports and a graphical representation of the completion status for the entire list of goals.
- **Both**

Key Indicators

Employee Goal Status

○ Performance Goals ○ Development Goals ◉ Both



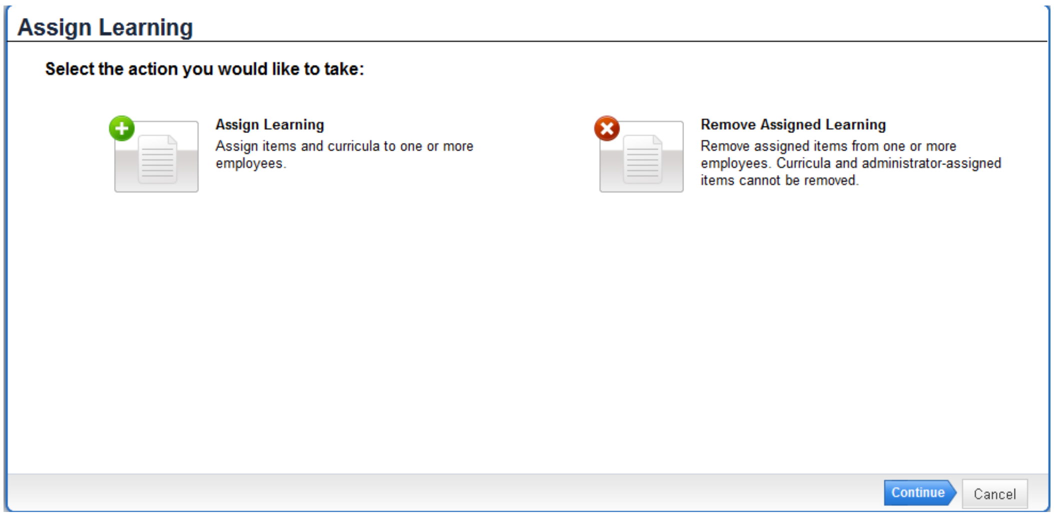
Name	Active Goals	Complete	Pending Approval	Average Toward Target
Chamberlin, Scott L	1	0	0	0%
O Donnell, Christine	1	0	0	0%
Gudmunds, Karl N	3	0	0	0%
Maher, Mary E	4	0	0	0%
Custer, Adrie S	3	0	0	0%
Breneman, Vincent E	1	0	0	0%
Garber, Molly E	3	0	0	0%

Assign Training to Subordinate To-Do List

Assign a Learning Item

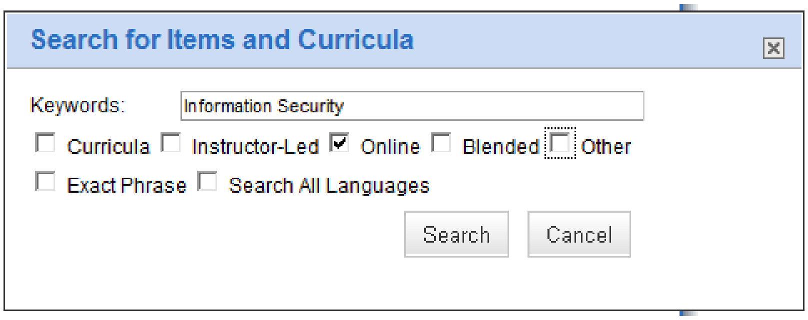
1. Click the **My Employee's** Tab

2. From the Supervisor Links section, click **Assign/Remove Learning**

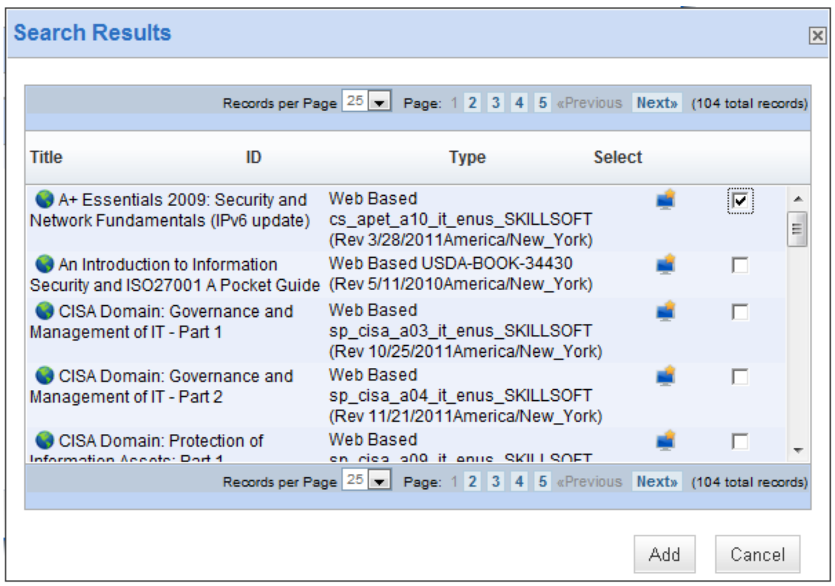


3. From the Assign Learning pop-up, click **Assign Learning** and click **Continue**.

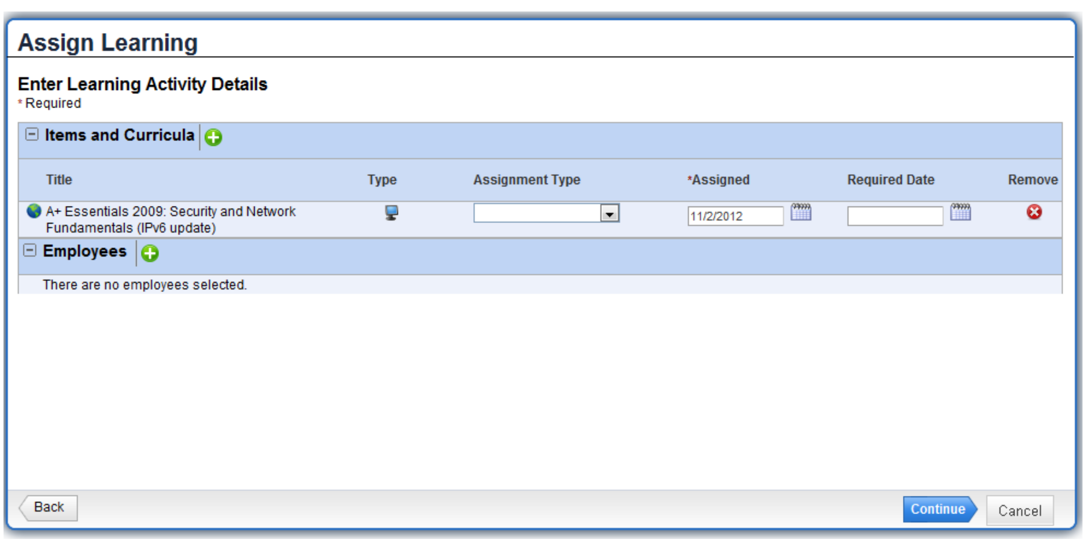
4. First, add the training item to the filter. To add the training, click the icon next to **Items and Curricula**.



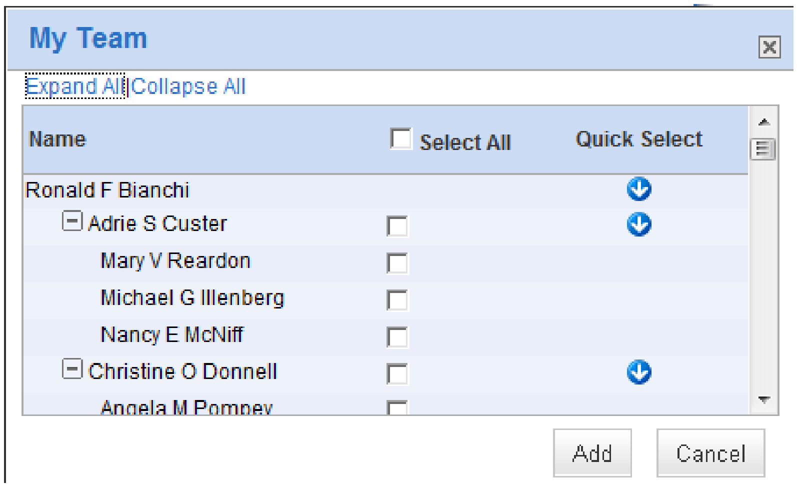
5. On the **Search for Items and Curricula** page, insert keywords for the training. You can also select the type of training: Online, Instructor Led, Other. By default, these are all selected.



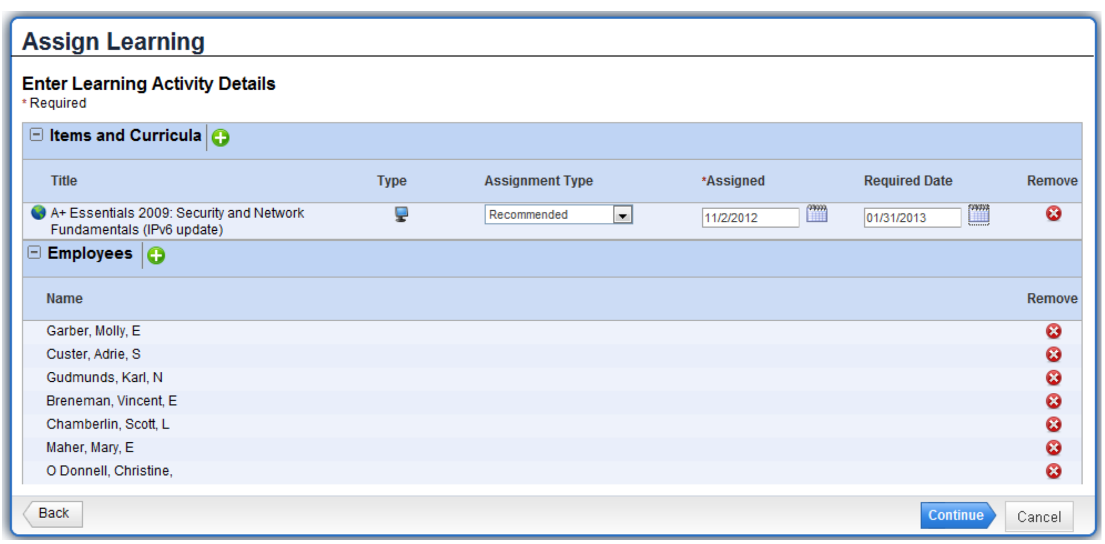
6. Locate the desired training and place a **Checkmark** in the add box. Then click **Add**.



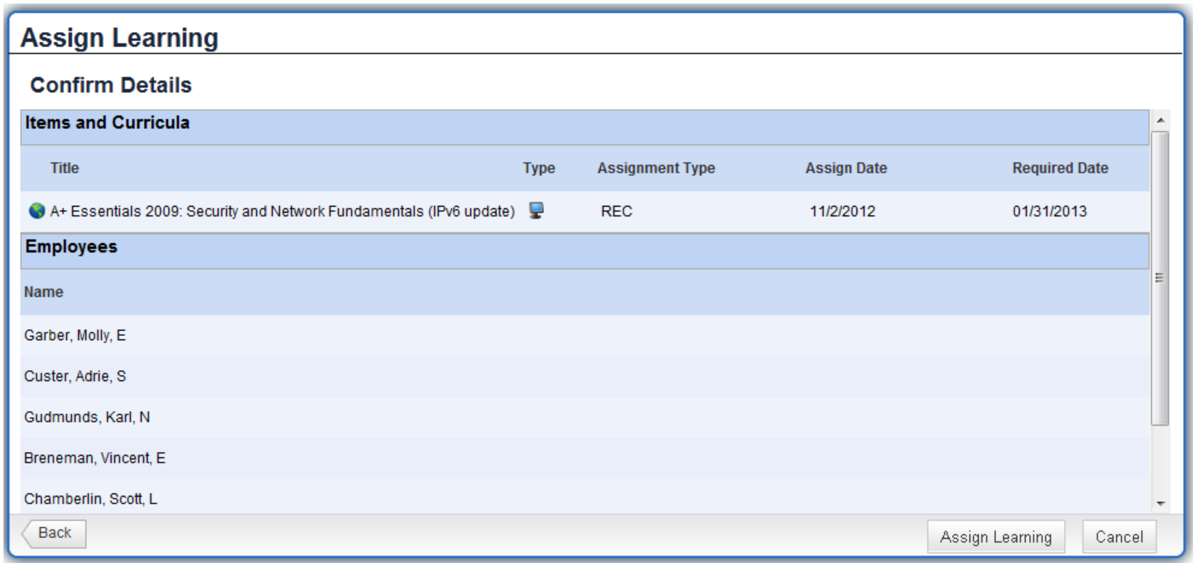
7. Once back in the **Assign Learning** page, you change the Assign type and add a Required Date for completion. Assign Type would Required, Optional, Mandated or Recommended. To add a Date of Completion, select the calendar icon and choose a date. *Note manually entering a date will cause an error in the system. Click the icon to add the Employees to filter.



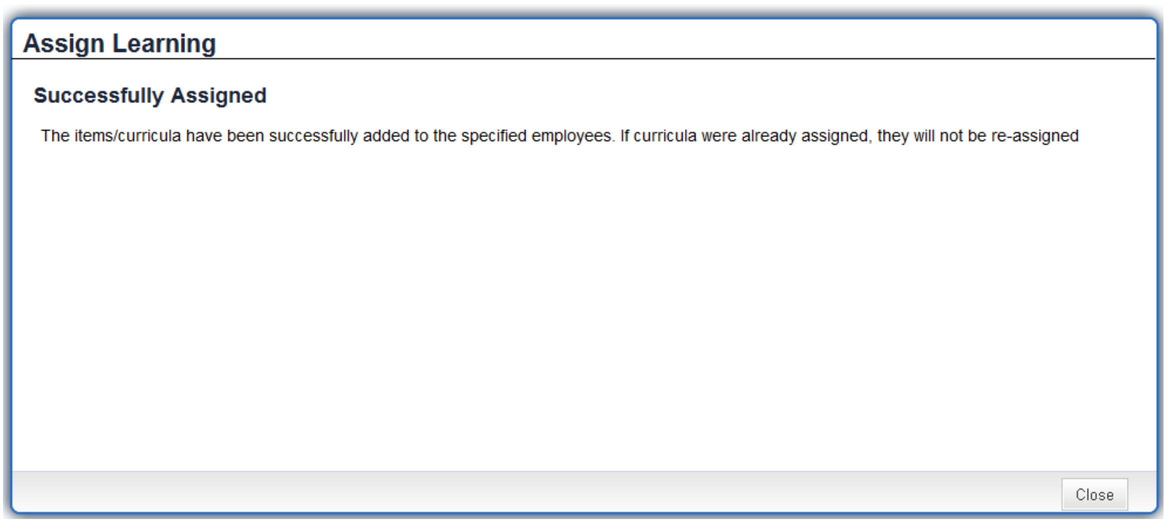
8. In the **My Team** pop up. Click Expand All if you wish to view all of the direct reports of your subordinates. You can manually place a checkmark in specific employee's check box or click **Select All** to select all employees from the list. You can also click the drop down arrow under **Quick Select**, when available, to select all direct reports and/or all reports from the list. Once this is complete, click **Add**.



9. If any employee's or training items need to be removed, click the icon to remove them. If not, click **Continue**.



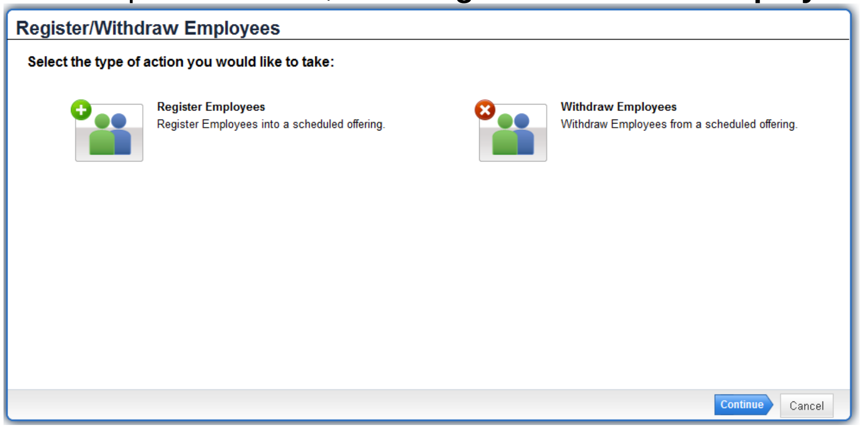
10. This is the final review screen. If any changes need to be made, click **Back**. If not, click **Assign Learning**.



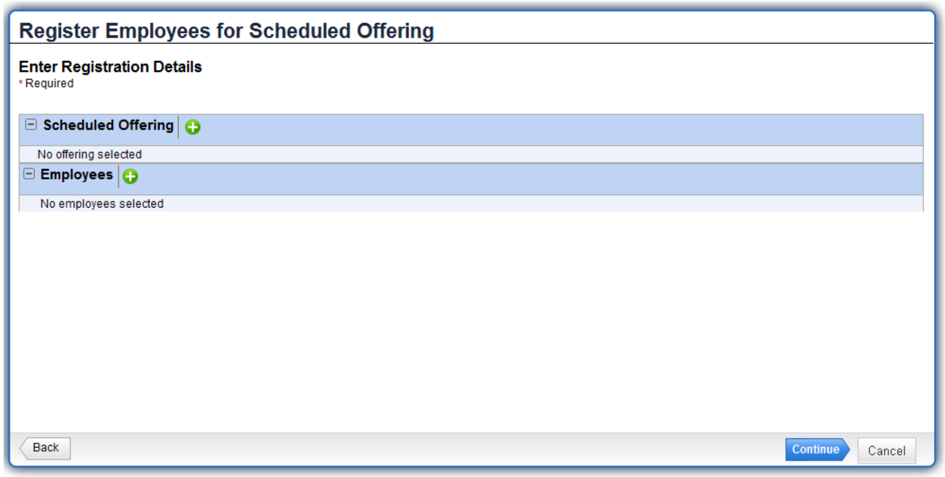
11. This is the confirmation message that the training has been added to the Employee's accounts. Clicking **Close** will take you back to the My Employee's tab.

Register in a Scheduled Offering

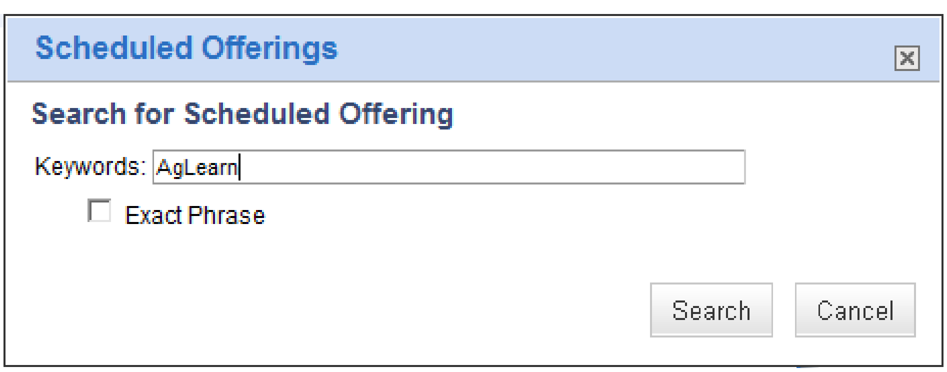
1. Click the **My Employees** tab link
2. In the Supervisor Links, click **Register/Withdraw Employees**.



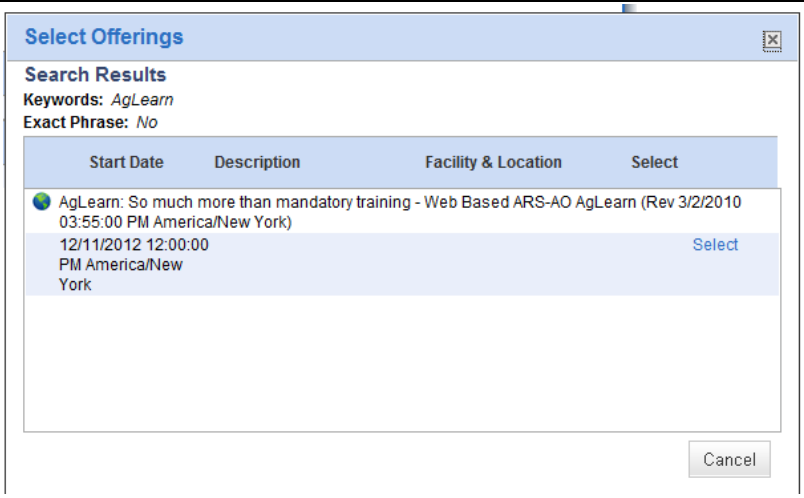
3. From the Register/Withdraw Employees pop up, click **Register Employees**. Then click **Continue**



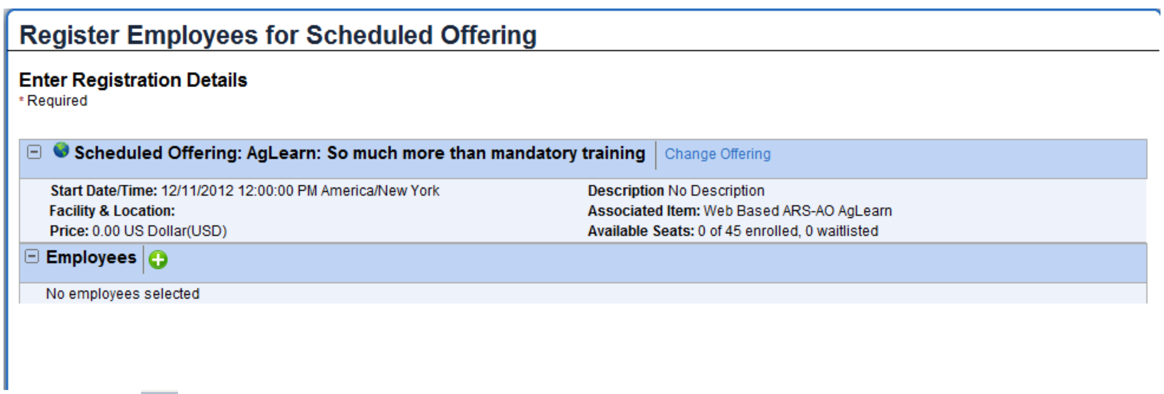
4. First, add the Scheduled Offering to the filter by clicking the  icon next to **Scheduled Offering**.



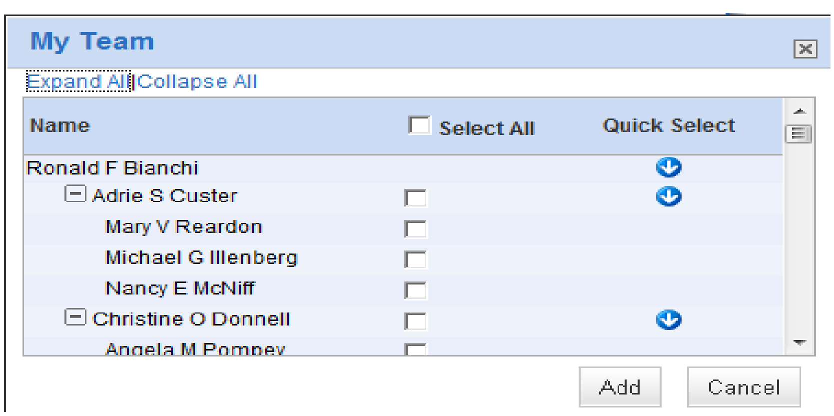
5. Enter the title for the Scheduled Offering in the **Keyword** section and click **Search**.



6. From the Search Results page, choose the Scheduled Offering by clicking **Select**.



7. Click the next to Employees to add your subordinates to the list of attendees.



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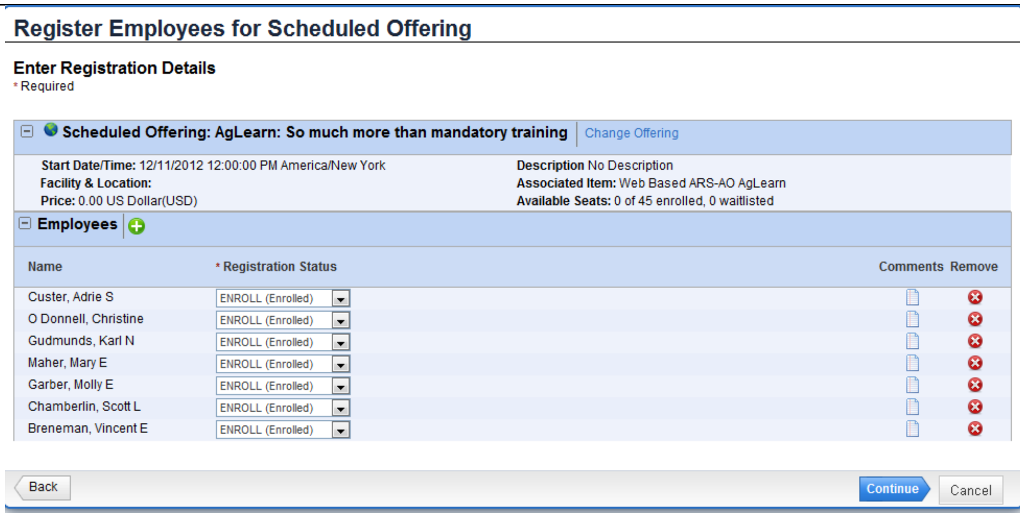
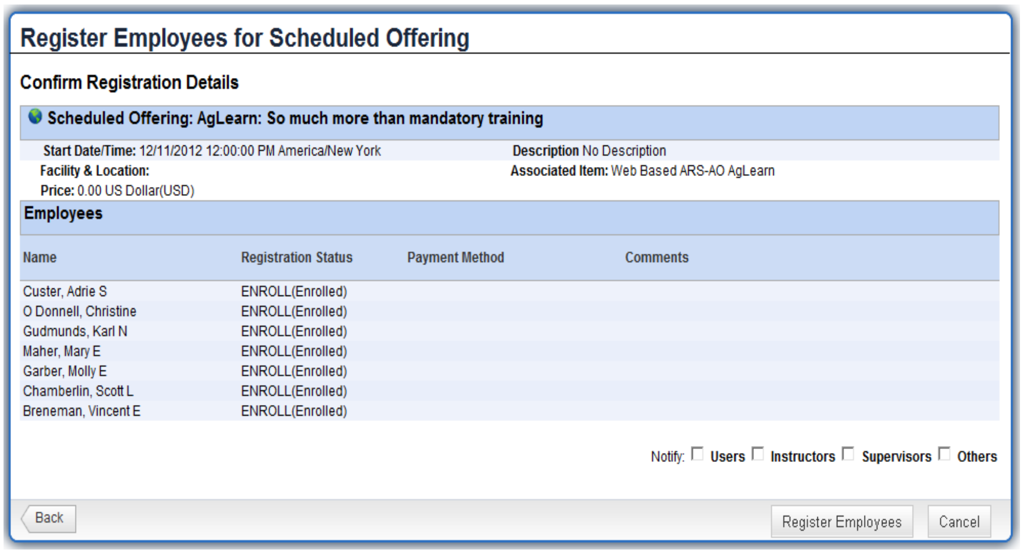
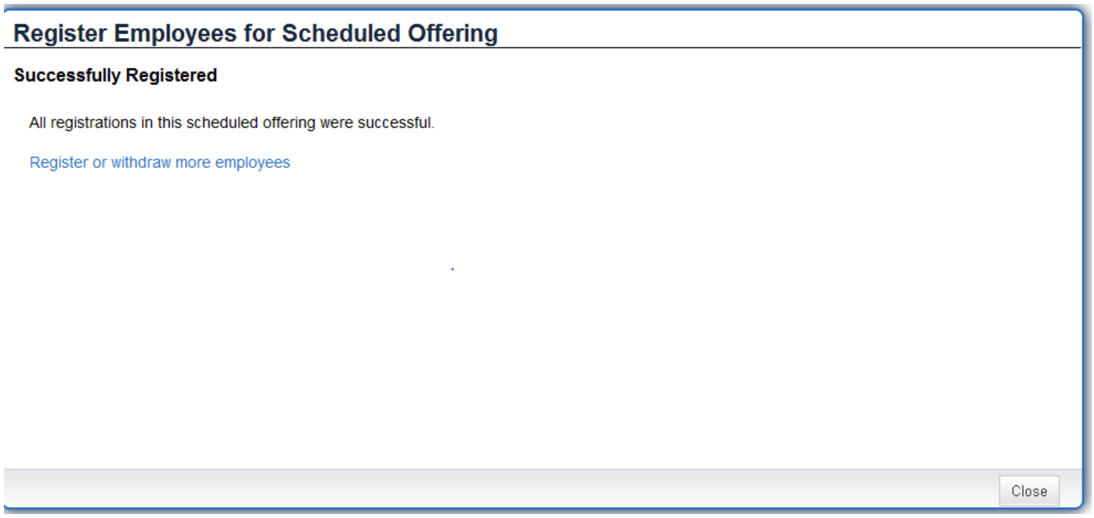


9. Once the employee's have been added to the roster, they can be removed by clicking the next to their name. Once all updates have been made, click **Continue** to proceed.



10. At the Final Review screen, you can have the AgLearn system send out notifications to the employee (user), instructors, supervisors or others to inform them that the employee(s) have been registered for this training. *Note this only works, if the employee has listed an accurate email address in their AgLearn account. If you do not wish to notify the employee, click **Register Employees**.



11. If you click the **Register or withdraw more employees link**, it will take you back to the beginning of the registration process where you can select **Register** or **Withdraw Employees.**

AgLearn Electronic Routing of SF182 Requests

The Standard Form (SF) 182 form is the **Office of Personnel Management (OPM)** form for **Authorization, Agreement and Certification of Training**. By completing this form through AgLearn, we are able to reduce the amount of typing required by the employee; route the request for approval/disapproval; electronically transfer data to comply with OPM's Enterprise Human Resources Integration (EHRI) requirements; and ensure that completion of the training will appear on the Completed Work of the employee.

USDA issued a memo mandating the use of the online Standard Form (SF)-182 for external training requests and approvals in AgLearn, effective October 1, 2007.

The **Administrative & Financial Management** section of **Agricultural Research Service** (ARS) has created supplemental instructions for completing the SF182 form. These instructions can be found via the web:

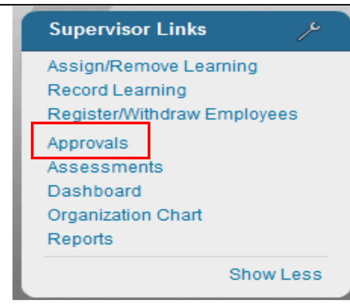
http://www.afm.ars.usda.gov/forms/EMPDEV/SF182-Instructions.PDF

SF182 Considerations before Approving

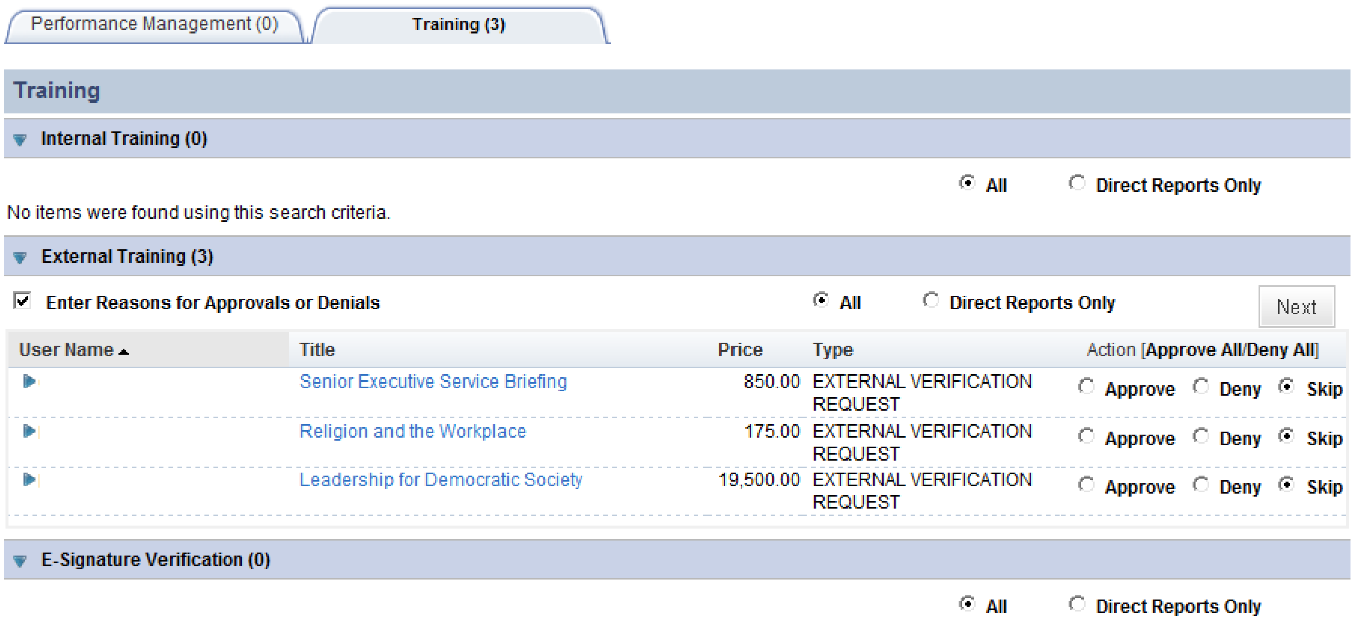
Field	Considerations
Course Title	Based upon the current or future job requirements of the employee and their position title, grade, and series, is this course appropriate? Does this course align with the performance elements of the employee? Is it listed on their individual development plan (IDP)? Has either the supervisor or employee searched AgLearn to see if an equivalent online course is available?
Tuition	Is the amount over $3,000? As a result, will this need processing by ARS? Does this request, coupled with others for this fiscal year, exceed the amount allocated for the employee?
Location / Indirect Costs	Is there travel and travel costs associated with this request? Is so, is this course also offered locally?
Start Date / End Date	When is the class being held? Does it coincide with a high activity period in the office? Are there one or more duties that someone else will need to perform during the absence of the employee? If the tuition amount is over $3,000, is there sufficient time for processing by ARS before the start date of the course or before all class slots are filled?
Duty hours / non duty hours	For courses that exceed more than 40 hours, what plans does the employee have for balancing the responsibilities of the job and the course?
Vendor	Is this a known and reputable vendor? Is the level of instruction offered by this vendor of high quality?

Approve or Deny a SF182 request

1) Locate and click on **Approvals**, found in the **Supervisors Link** section located on the right-hand side of the screen.

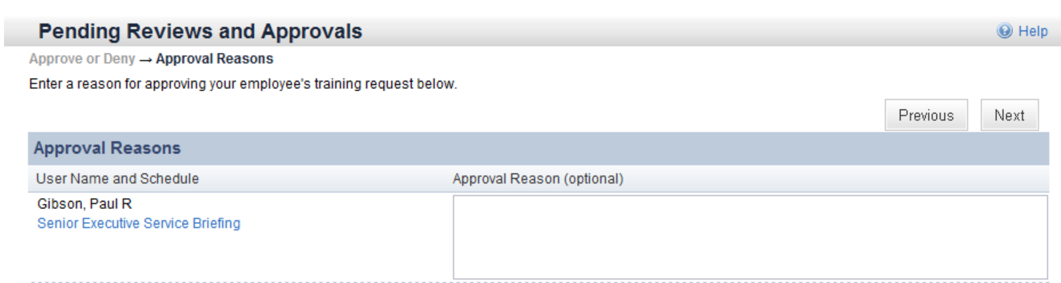


2) The **Pending Reviews and Approvals** screen will display. The screen is divided into two tabs, **Performance Management** & **Training**.

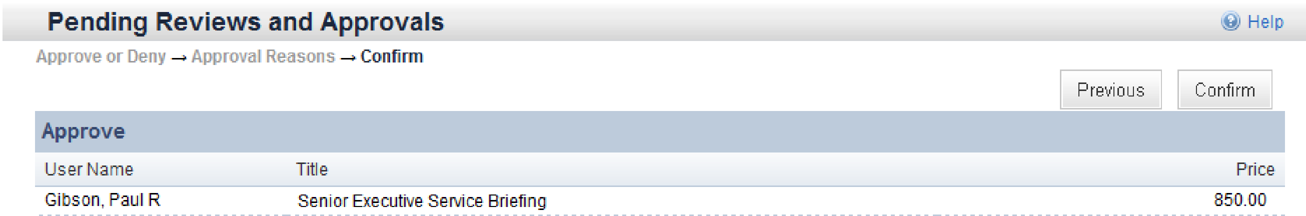


3) The **Training** tab contains sections for **Internal Training** and **External Training**. Any SF182 requests needing approval/disapproval will be listed. Clicking on the blue hyperlink associated with the course title to display the training request details.

4) Place a mark in the **Approve** or **Deny** section and click **Next**.



5) You can give a reason for the Approval or Denial in the comment section. This is an optional section. Click **Next** to continue.

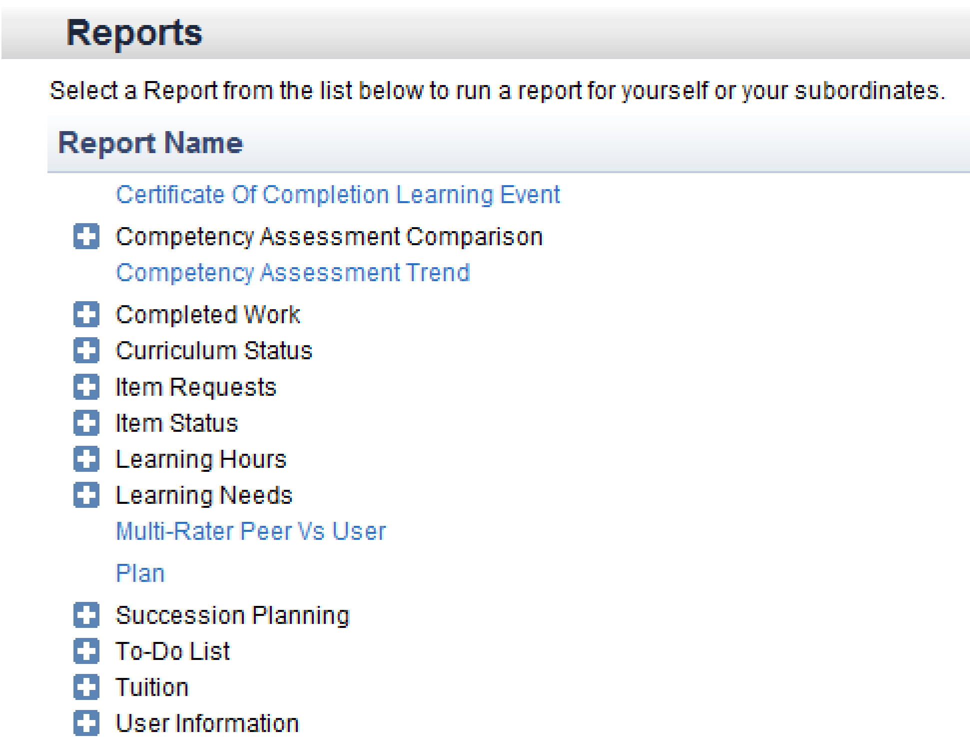


6) Verify the information in this section. Once all information has been verified, click **Confirm** to submit the Approval or Denial of the request.

Reports

You can navigate to reports via **Supervisor Links**, located on the right-hand side of the **My Employees** screen.

Click on the plus (+) sign associated with a report name will expand the list. Click on the hyperlink to navigate to the Run Report screen.



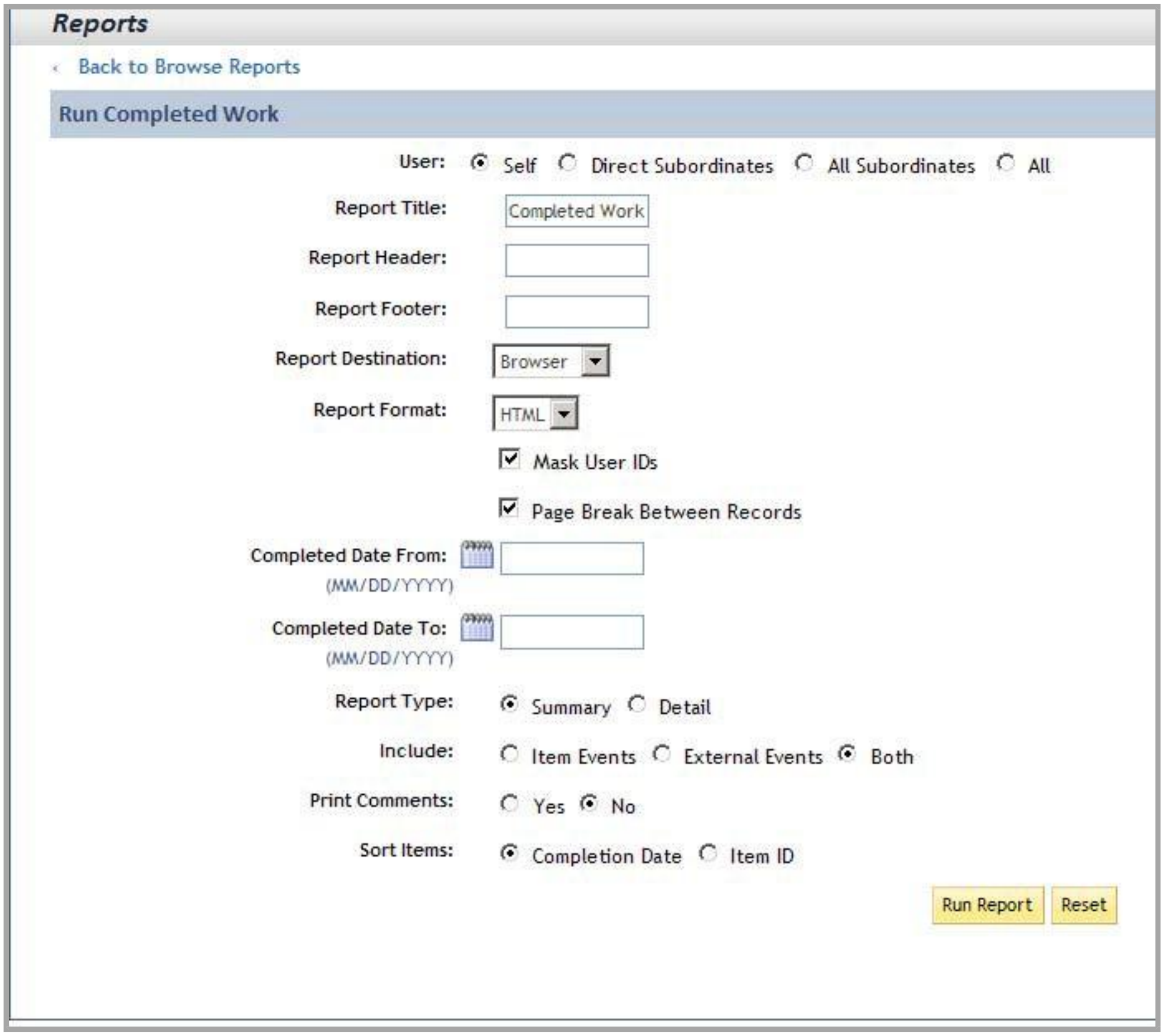
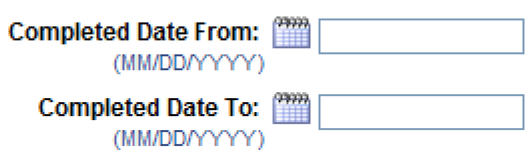


Figure 3 Run Report screen for Completed Work Report



NOTE: Clicking on the calendar icon associated with a date criteria field will open and display the **Select Date** dialog box.