Job Aid: Managing Employees (Supervisors)

Purpose

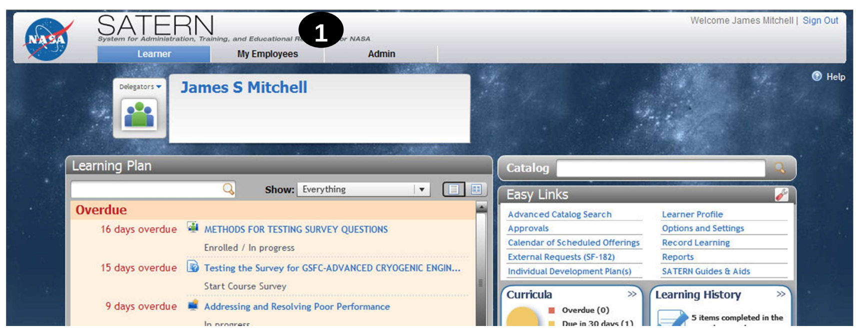
The purpose of this job aid is to guide Supervisor through the step-by-step process of managing Employees within SATERN.

Task A
Open and View an Employee's Record
5 Steps

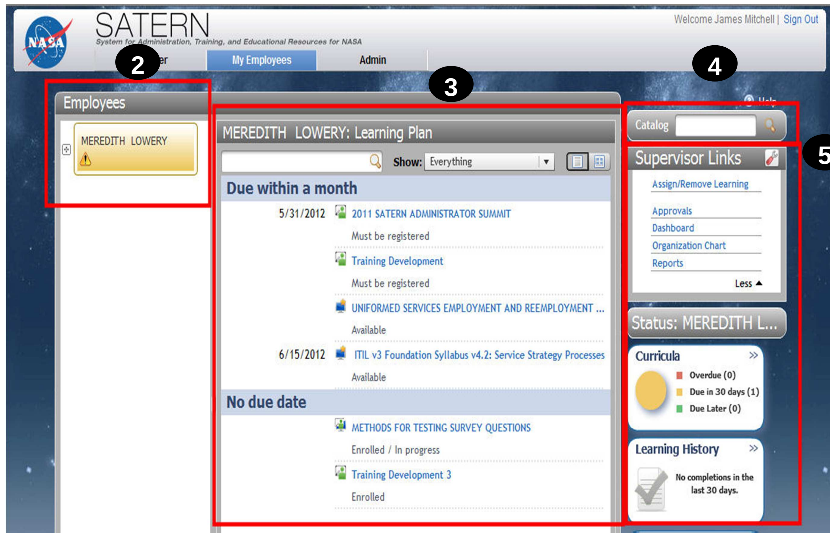
Task B
Approve or Deny Training Requests
9 Steps

Task C
Run Reports
5 Steps

Task A. Open and View an Employee's Record

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

The My Employees section is designed to provide Supervisors with the resources they need to monitor and manage the Learning Activities of their direct and indirect reports.



2 Use the employee tree to view the Learning Plan of direct and indirect reports.

***Note**: If you hover over a Emplyee's Card, you can perform the available actions without loading the Learner's Learning Plan.*

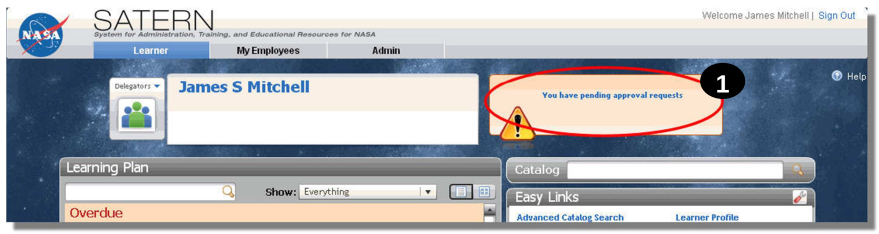
3 When you click an **Employee Card**, the system shows that employee's Learning Plan, which functions exactly like your Learning Plan, but for the selected Employee.

4 Perform a simple catalog search, for example, to find an item to add to your Learning Plan or the Learning Plan of an Employee.

5 The Supervisor Links area is designed so that you can access parts of the application quickly and easily. The Status Pods in the Supervisor area are specific to the Employee who is selected in the

Task B. Approve or Deny Training Requests

1 From the Home Page, click the **You have pending approval requests** link in the Alerts box.



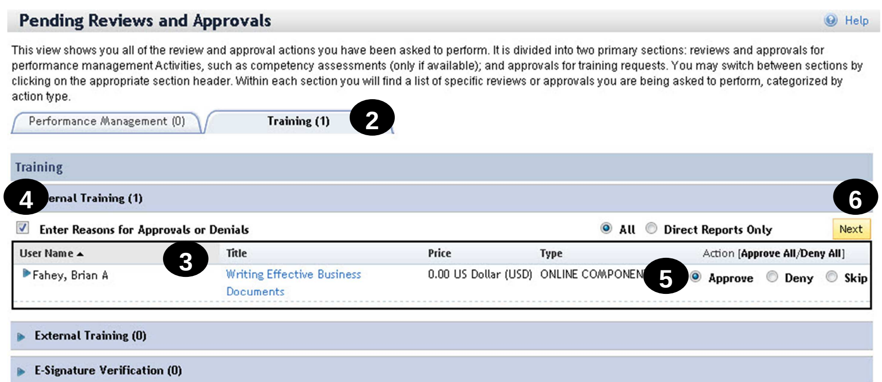
2 The **Pending Reviews and Approvals** page displays and opens to the pending approval.

3 Click the **expand icon** (▶) next to the Learner's name and/or click the **Title** link for additional information.

4 Select the **Enter Reasons for Approvals or Denials** checkbox to allow for comments.

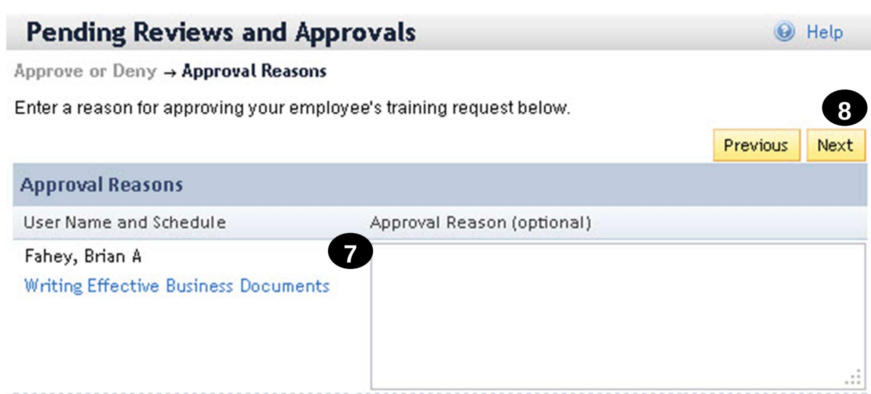
5 Select the **Approve** (or **Deny/Skip**) radio button.

6 Click **Next.**



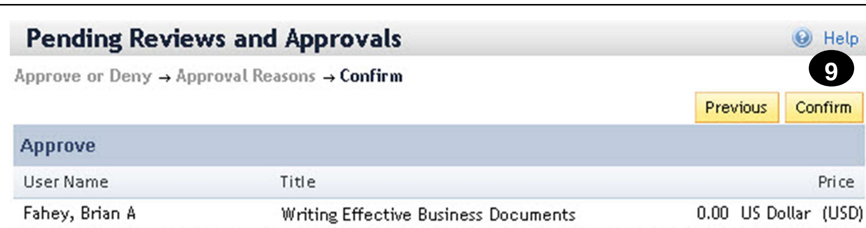
7 Enter reasons for approval/denial, if applicable.

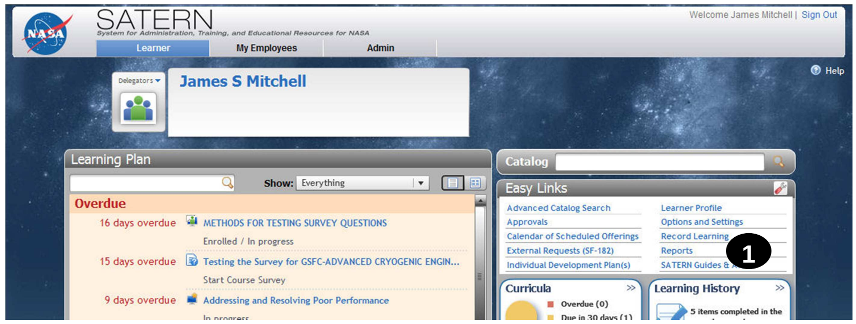
8 Click **Next.**



9 Click **Confirm.**

Notifications are sent to the affected Learners.



<table>
<tr><th colspan="3">Task C.   Run Reports</th></tr>
<tr>
<td>1</td>
<td>From your own Learner tab on the Home Page, click the Reports Easy Link.</td>
<td>
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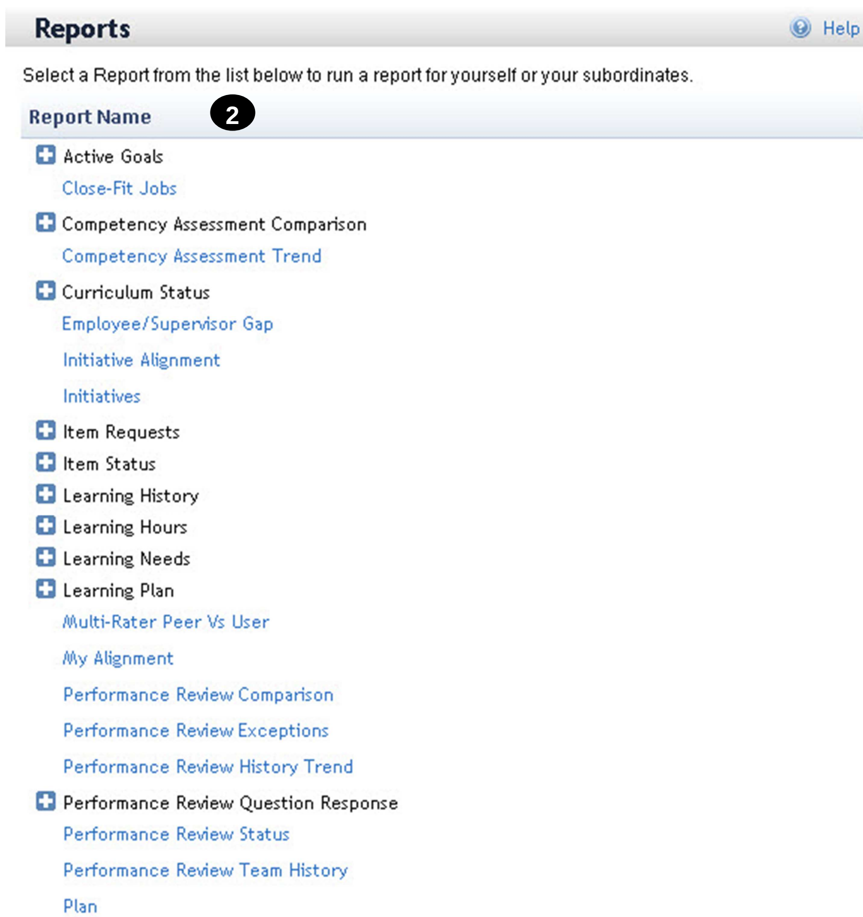
<tr>
<td>2</td>
<td>Click a Report Name to open the report.
Note: Available reports will vary depending on your role.</td>
<td>
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3 Enter the report criteria.

Note: *Available criterion will vary depending on the report.*

4 Click **Run Report**.

or

5 Click the **Back to Browse Reports** link to return to the list of reports.