Manager Functions in the OLC

Follow the steps below using the *Google Chrome* web browser to perform the following team member tasks:

- Search For and View Team Members
- Complete Corporate Responsibility and DURS for New Hire
- View Team Member Transcript
- Run a Report
- Assign a Course to a Team Member

Note: Switch from *Learner* to *Manager* to complete any of the following sections.

Employees

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Search For and View Team Members

1. Click Employees from the menu.

Employee listings display on the right side of the screen.

2. Click an employee name.

The following employee widgets display on the right side of the screen:

- Profile
- Courses (Enrolled)
- Certification Programs (Enrolled)
- Course Statistics



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Internal Distribution Only

Complete Corporate Responsibility and DURS for New Hire

1. Click **Employees** from the menu.



Employee listings display on the right side of the screen.



2. Click an employee name.

The following employee widgets display on the right side of the screen:

- Profile
- Courses (Enrolled)
- Certification Programs (Enrolled)
- Course Statistics





3. Click the checkbox to select the

_Corporate Responsibility Department/Unit/Role Specific Orientation - CR DURS course in the *Courses* widget.

Courses	
Corporate Responsibility Department/Unit/Role Specific Orie	entation -
(1)	\bigcirc
Status: NOT STARTED	3
Type: CLASSROOM	
_Department/Unit/Role Specific Orientation - DURS 2020	-
(/) Status: NOT STARTED	
Type: CLASSROOM	

4.	Click the calendar icon. Enter
	the Corporate Responsibility completion date.

Assign Credit	
4 Required	
Event *	
CR DURS 2020 - 12/31/2020 🔻	
E	
Cancel OK	

- 5. Click OK.
- 6. Repeat this process for the _Department/Unit/Role Specific Orientation DURS course.

Note: Managers are still required to place the DURS hard copy form in the team member's file, but all dates are tracked in the Learning Management System/OLC.

Courses	
_Corporate Responsibility Department/Unit/Role Specific Orientation - (/) Status: NOT STARTED	
Type: CLASSROOM	,
_Department/Unit/Role Specific Orientation - DURS 2020	



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View Team Member Transcript

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1. Click **Employees** from the menu.

Employee listings display on the right side of the screen.

Employees ≡ **‡**Bay 2 00 2 0% @baycare.org 0% 23% 6 + Role: ADMINISTRATOR AUTHOR Role: 🕕 Role: ADMINISTRATOR Role: Employee ID: 🔉 Social Learnin ee ID: Title Title: Title: Title: Completed courses: 0 of 0 Completed courses: 0 of 0 Completed courses: 0 of 0 Completed courses: 8 of 34 @baycare.org 0% @baycare.org 0% 2 Mabaycare.org

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2. Click an employee name.

3. From the employee *Profile* widget, click **View Transcript**.

The employee transcript opens on the right side of the screen.





Run a Report

Click the suitcase icon in the upper left corner to change your login type from Learner to Manager.

1. Click **Reports** from the menu.



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	•	
Click on	the name of the report you want to	generate
Category	•	
	Category 🔺	Ad Hoc Reports 🔺
~	Category: Manager Reports	
	Manager Reports	2019 TME Direct Report Exception Report
	Manager Reports	Completion Report by Department
	Manager Reports	Direct Report Completion Report
	Manager Reports	Direct Report Exception Report
	Manager Reports	2 Exception Report
	Manager Reports	Exception Report by Department
	Manager Reports	Transcript by TM Name
	Manager Reports	Transcript by TM Number
	Manager Reports	Transcripts by Department

Report options display on the right side of the screen.

2. Click the **report name** you want to generate.

In this example, click Exception Report.

3. Select report criteria.

In this example, select course name.

4. Click Update Results.





Internal Distribution Only

The report preview displays.

9 (UPDATE R	ESULTS										
Workplac	e Violence Manager	Job Code	Job Title	Login Number	TM #	Hire Date	Organization Code	Process Level	Department	Completion Date	TM Status	Corr
		7053MG	ASSOC PHYSICIAN- PRIMARY CARE			3/11/2019	4310.68371	BAYCARE MEDICAL GROUP INC	WCA_ACEVEDO MD.ILEANA		ACTIVE FULL TIME	
		2935BC	CLINICAL INFORMATICS COORD-SJW			3/1/1993	5100.80107	ST JOSEPH'S HOSPITAL INC	ADMIN - HOSPITAL WOMENS		ACTIVE PRN	
		5016HH	HOME HEALTH CLINICIAN II			3/11/2019	7251.56209	BAYCARE HOME CARE INC	SKILLED NURSING BRADE		ACTIVE FULL TIME	

- 5. Select one of the following:
 - Print the report
 - Export to Excel
 - Change the number of rows that display in the report preview

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	Exce	eption	Repo	ort							
	Course Work	e Name place Viol	ence							+	
	Ð	UPDATE R	ESULTS								
	Workplac	e Violence									
	TM Name	Manager	Job Code	Job Title	Login Number	TM #	Hire Date	Organization Code	Process Level	Department	Comple
			7053MG	ASSOC PHYSICIAN- PRIMARY CARE			3/11/2019	4310.68371	BAYCARE MEDICAL GROUP INC	WCA_ACEVEDO MD.ILEANA	
			2935BC	CLINICAL INFORMATICS			3/1/1993	5100.80107	ST JOSEPH'S HOSPITAL INC	ADMIN - HOSPITAL	

Note: Team member transcripts can also be viewed and printed.

- Transcripts are sorted by most recent completion.
- Sort order can be changed.



Assign a Course to a Team Member

- Managers are able to assign both online training and classroom courses for team members to attend.
- After registering a team member for a classroom course, inform him/her of the course date and time as the OLC does not currently send notification to registered team members.
- Once you assign a training, there is no way to cancel it (other than emailing *OLCAdmin*), so please be careful about what is being assigned to your team members and ensure you have the correct course name.
- Do not assign courses that have audiences assigned to them, as they refresh each night.
 Note: Your assignment that was pushed out to the team member will be removed unless the team member completes the course the same day you registered him/her for it.
- Courses already completed by the team member do not display in the search results as available to add.
- 1. Click **Employees** from the menu.

 On the box of the team member to assign training to, click the + button.

The Add Courses window displays.

- 3. Check the **box** next to the course name to assign.
- 4. Click the **OK** button.

The course displays on the team member's dashboard to complete.





7 of 7 Revised 03/17/2020