

CSU Learn

Manager Quick Guide

CSUCI's portal for learning and professional development

Managers can:

- Quickly view team learning progress
- Assign training to employees
- Register employees for training
- Approve learning requests
- Delegate training tasks to designated proxy

Self-Menu Quick access to your profile and sign out

Manager Menu Fast access to team data

Library Browse more than 60 topics

Search more than 75,000 books, videos and courses

Help context-sensitive help

The screenshot displays the CSU Learn Manager interface. At the top is a navigation bar with icons for user profile, team, library, and help, alongside the Channel Islands California State University logo and search/help icons. Below the navigation bar is a large video player showing a CSU Tutorial with a red overlay that says 'Click here to watch the tutorial'. Under the video player are four main content tiles, each with an icon and a title: 'Assigned Learning' (graduation cap icon), 'Recently Viewed' (bookmark icon), 'Transcript' (paper plane icon), and 'Training Schedule' (calendar icon). Each tile includes a brief description of its function. Below the tiles are four corresponding text blocks providing more detail for each feature.

Assigned Learning
Content assigned based on your role.
One-click access to assigned learning

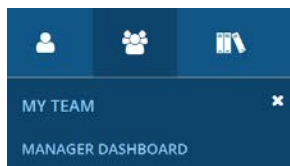
Recently Viewed
Access recently viewed content.
Quickly revisit your last learning activities

Transcript
Access your training records.
Your learning history in one place

Training Schedule
View upcoming training on campus.
See upcoming classes at your campus

Getting started with Manager Tools

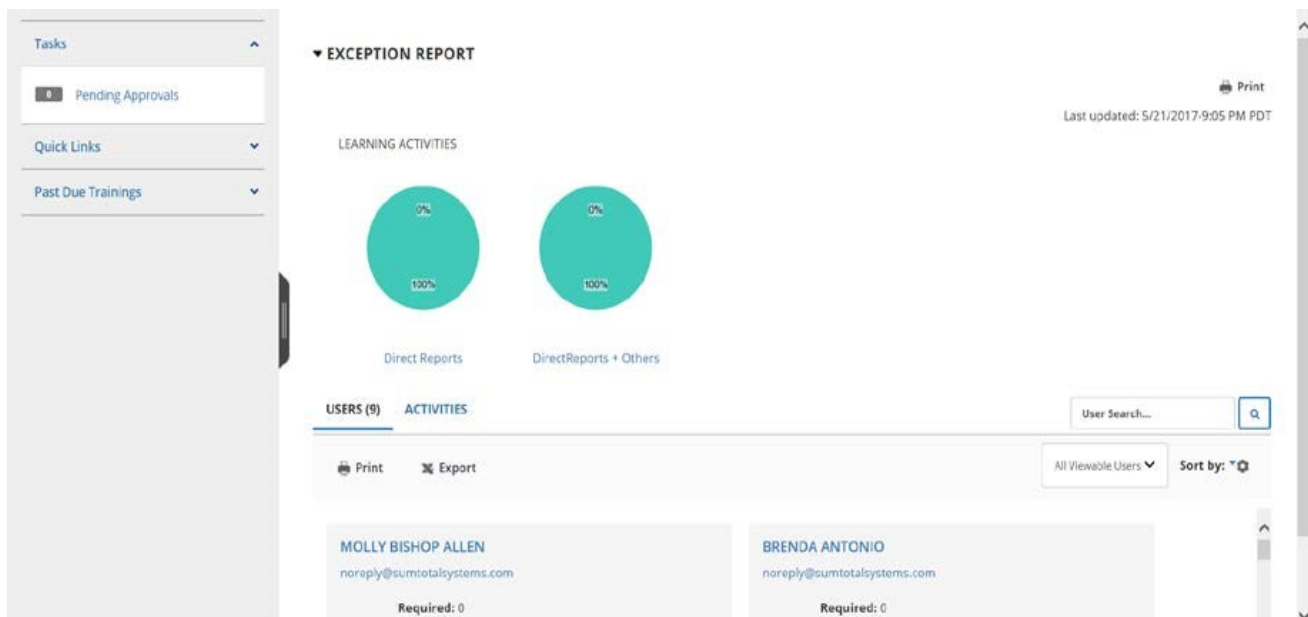
Once you have been identified as the manager of a user in the CSU Learn system, you will automatically have the **My Team** icon appear in the Top Menu. Clicking on that will give you access to a **Manager Dashboard**.



Manager Dashboard

When you navigate to your Manager Dashboard, you will be able to see:

- A snapshot of your current **exception report**, which shows the overall status of your managed users' assigned training.
- A list of your managed users with the status of their individual assigned training.



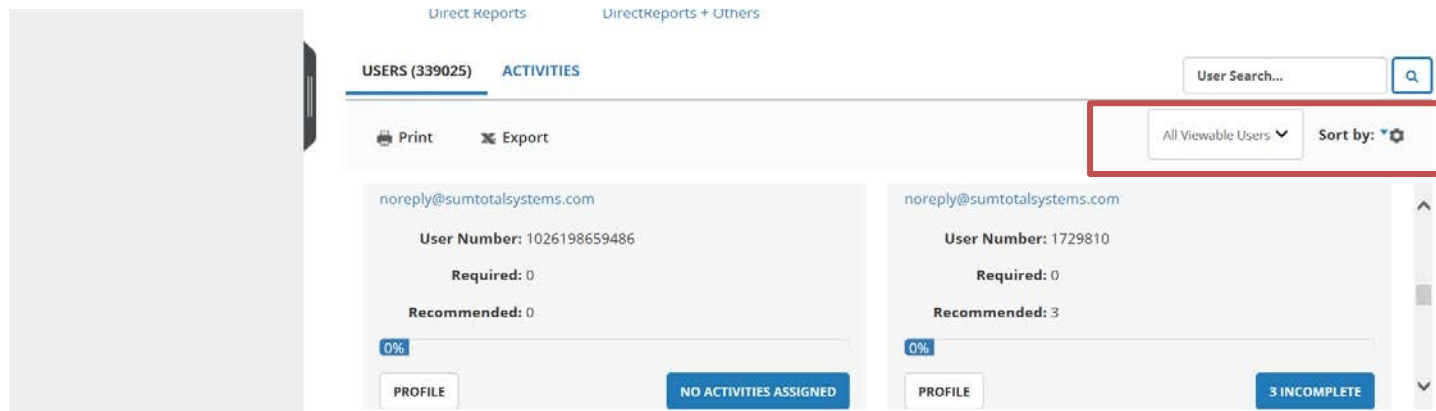
Note: Manager Dashboard is updated nightly, so if one of your users completed training after the last update, it will not appear in this view until the next update. However, the user's training transcript and schedule are displayed in real time and will show you their latest status.

View Managed Users

In the Manager Role, you have the ability to view information about your managed users and the progress of their assigned activities.

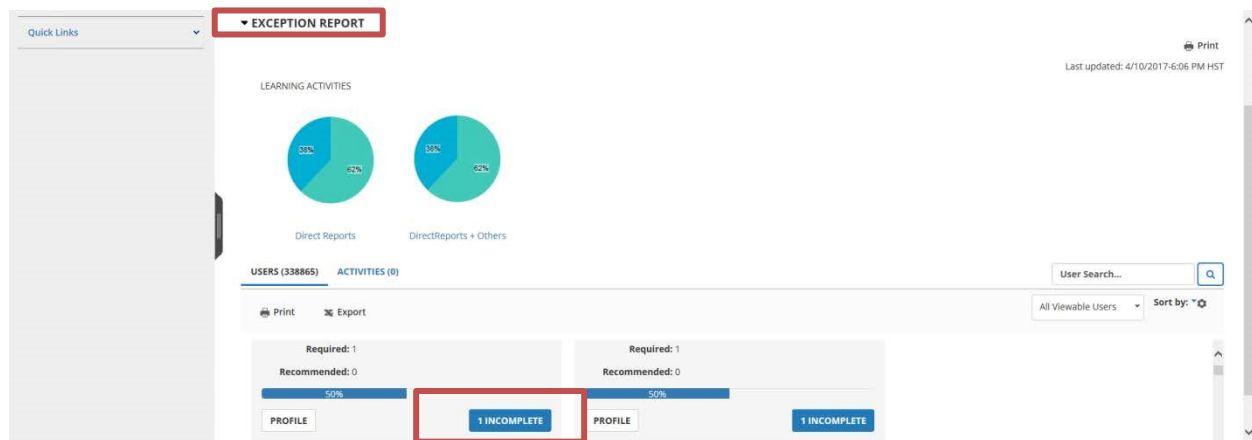
Your viewable users will all be displayed in tiles on your **Manager Dashboard**. You can scroll through these tiles to locate a particular individual or you can search the user by name, or sort in ascending or descending order (by name, assignment progress, etc.).

You will automatically see all users you have been given access to view, either as your direct reports or as managed users whose training you are responsible for managing. If you manage more users than just direct reports, you can change your view from **All Viewable Users** to **Direct Reports** if you wish to only view your direct reports.



View Status of Assigned Training

When you first enter your **Manager Dashboard** you will see an overview of your managed users and the status of their assigned training. The **Exception Report** at the top will show you the percentage of compliance your managed users are currently at for all training assigned to your managed users. For each individual, you will see the overall status of their currently assigned training. Click the blue **incomplete** button to see a more detailed report. Remember, you can also sort this list by process.



Assigned Training by Activity

You can also see which trainings are assigned to your managed users and the overall completion of the training. Switch from the **Users** view **Activities** view to see all the activities that are currently assigned

to your managed users. You will now see how many are still required to complete each training and the overall percentage of completion.