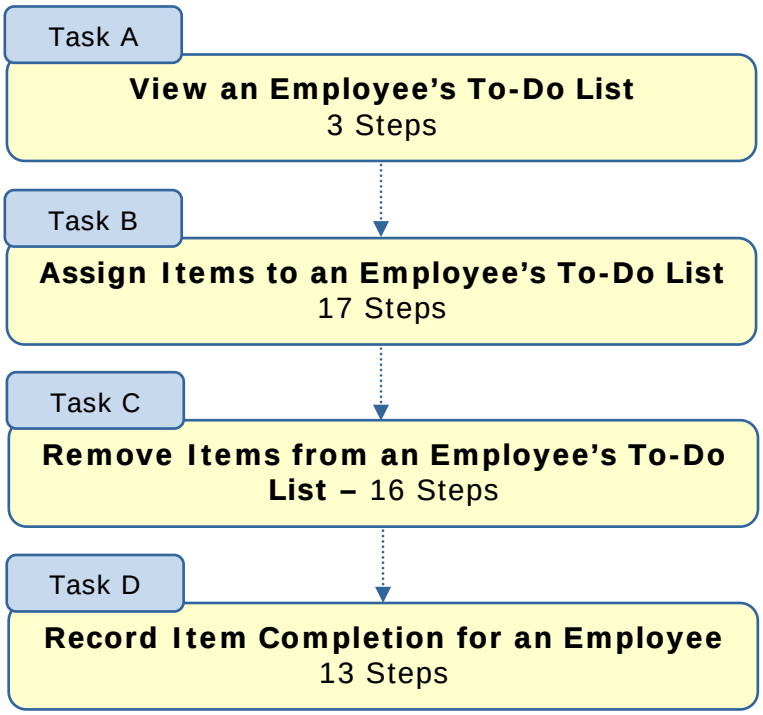
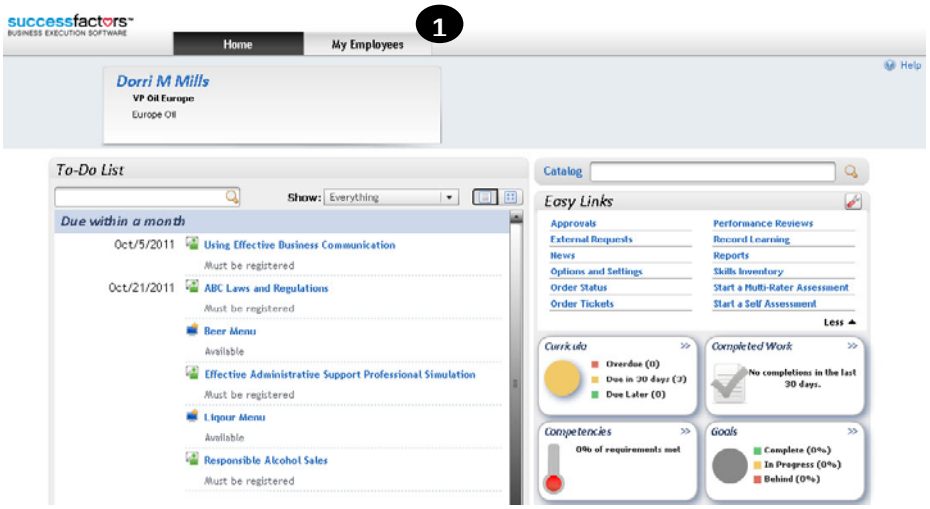
Job Aid: Managing Learning Activities (Supervisor)

Purpose

The purpose of this job aid is to guide supervisor users through the step-by-step process of managing employees' To-Do Lists within SuccessFactors Learning.



Task A. View an Employee's To-Do List

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

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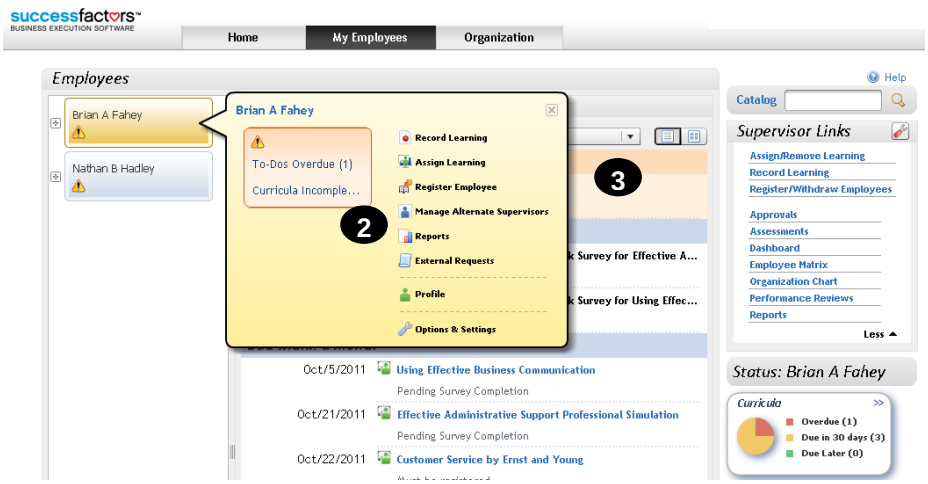
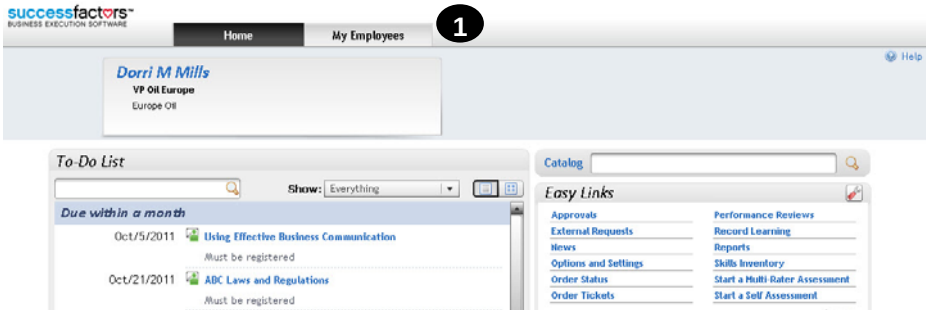
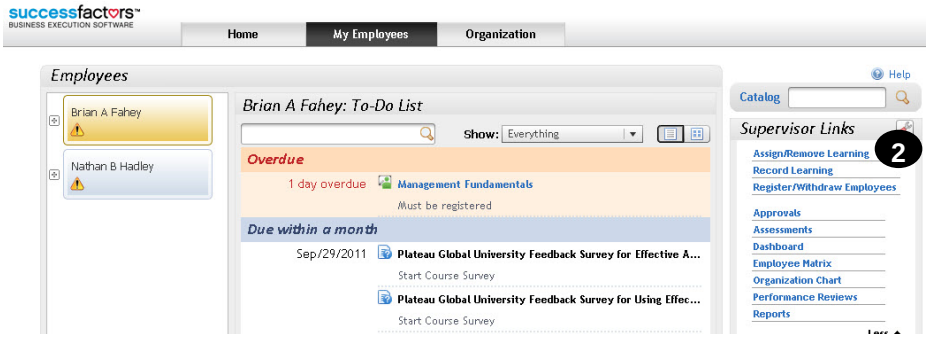
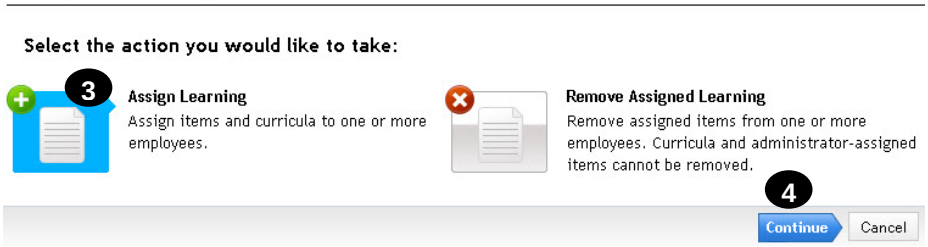
	Use the employee tree to view the To-Do List of direct and indirect reports.	
2	Hover over an employee card to perform the available actions without loading the user's To-Do List.	
3	When you click an employee card, that user's To-Do List is displayed.	

Note: You may customize the view by filtering the To-Do List to show Learning only, Registrations, etc.

Task B. Assign Items to an Employee's To-Do List

1	From the Home page, click the **My Employees** tab.	
2	Click the **Assign/Remove Learning** supervisor link.	
3	Click **Assign Learning**.	
4	Click **Continue**.	

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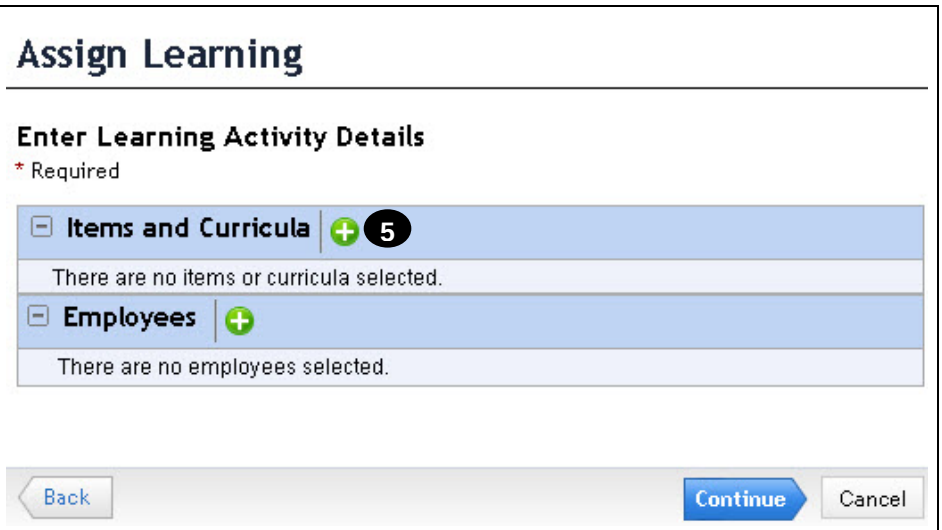
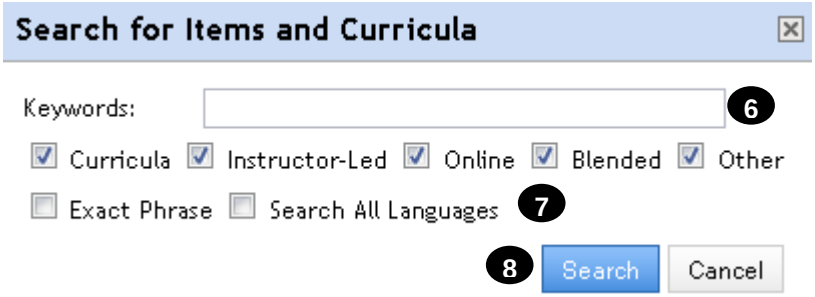
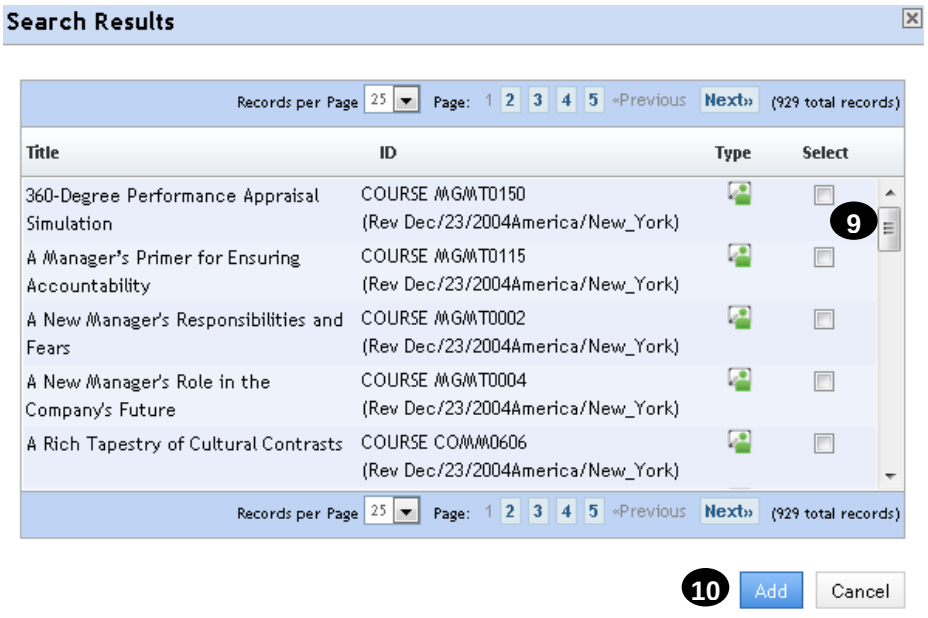
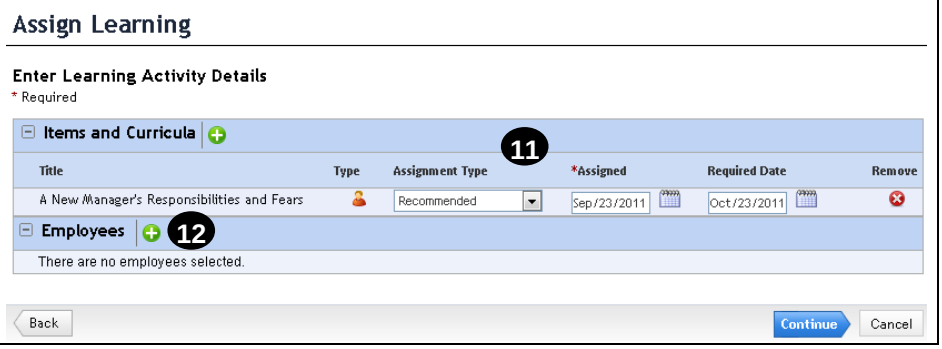
5	Click the Items and Curricula **Add** icon ( ).	
6 7 8	Enter keywords to search for the item/curricula to assign to the employee. Use the checkboxes to further filter your search. Click **Search**.	
9 10	From the search results list, click the check the **Select** checkbox. Click **Add**.	
11 12	Modify the assignment type, assigned date, and required date as necessary. Click the Employees **Add** icon ( ).	

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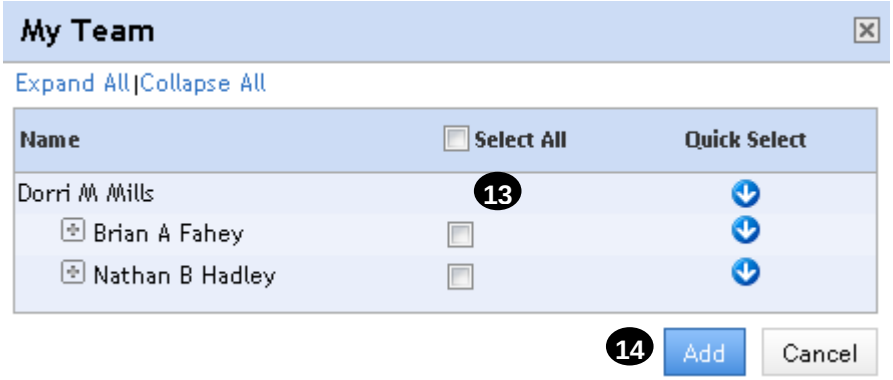
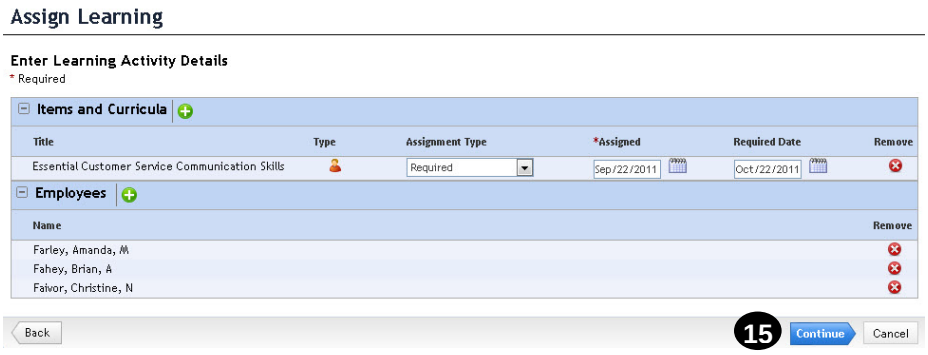
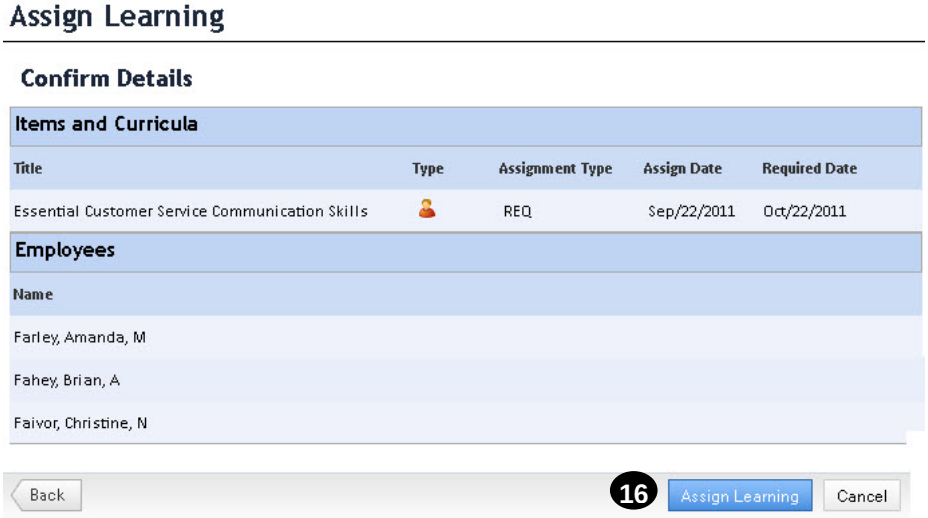
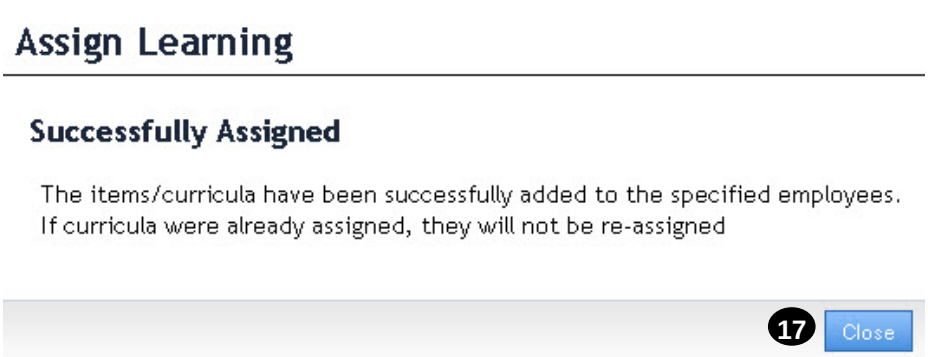
13 14	Click the checkboxes next to the employees you wish to add the item/curricula to. Click **Add**.	 *Note: Click the Quick Select icon ( ) to simultaneously select all direct and/or indirect reports for the corresponding employee.*
15	The selected employees are listed. Click **Continue**.	
16	Review and confirm the details of the item/curriculum assignment. Click **Assign Learning**.	
17	A confirmation message displays indicating successful assignment. Click **Close**.	

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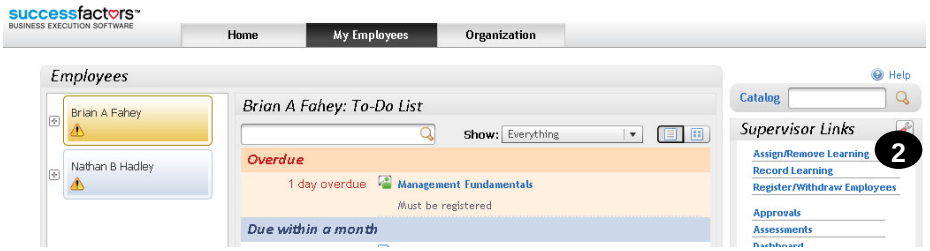
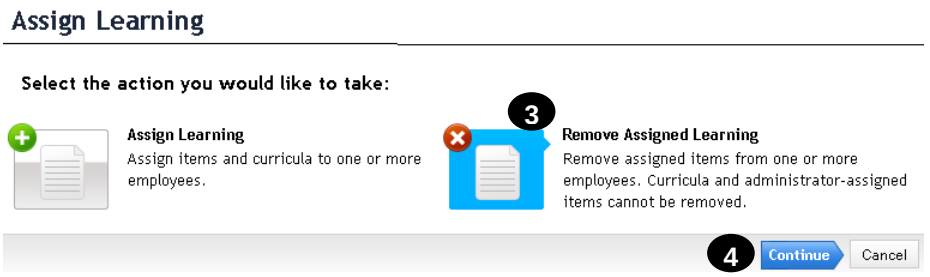
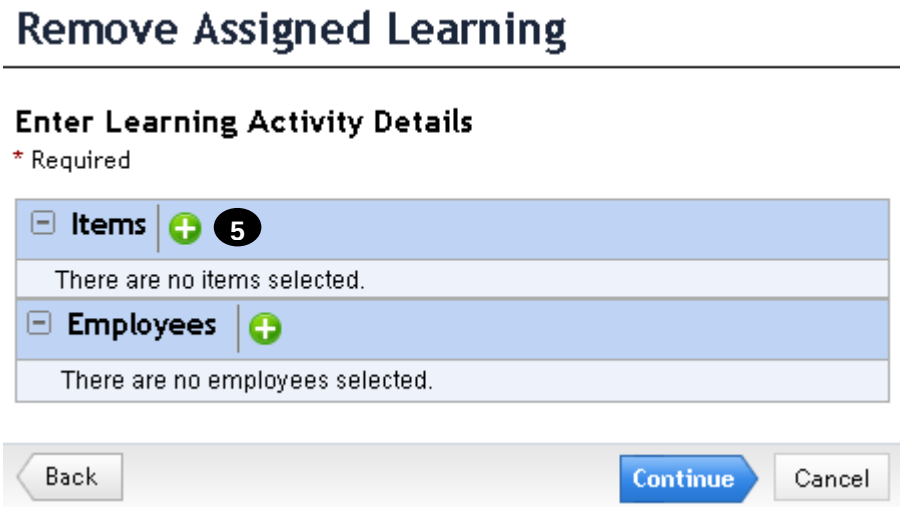
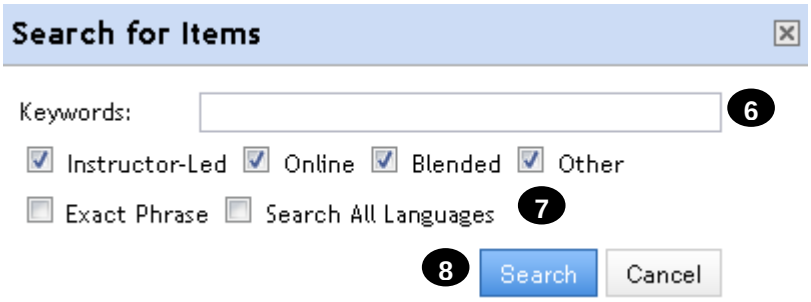
Task C. Remove Items from an Employee's To-Do List

1	From the Home page, click the **My Employees** tab.	
2	Click the **Assign/Remove Learning** Supervisor Link.	
3 4	Click **Remove Assigned Learning**. Click **Continue**.	 *Note: The Remove Items option will not remove items assigned to a user through a curriculum or by an administrator.*
5	Click the Items **Add** icon (⊕).	
6 7 8	Enter keywords to search for the item to remove from the employee's To-Do List. Use the checkboxes to further filter your search. Click **Search**.	

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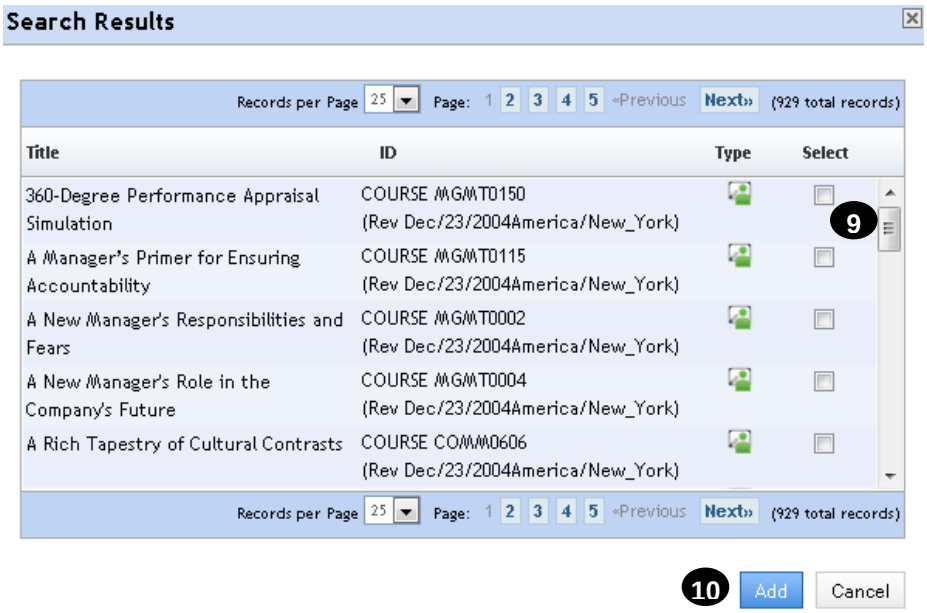
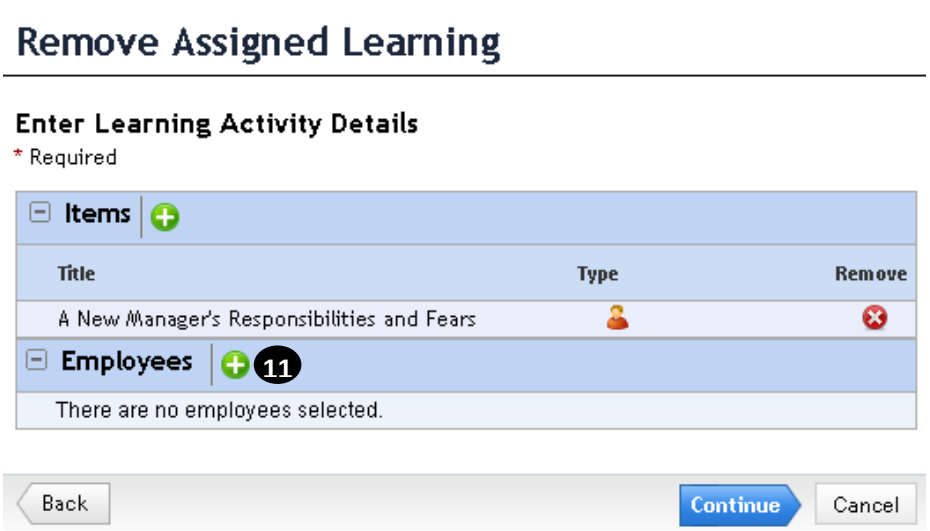
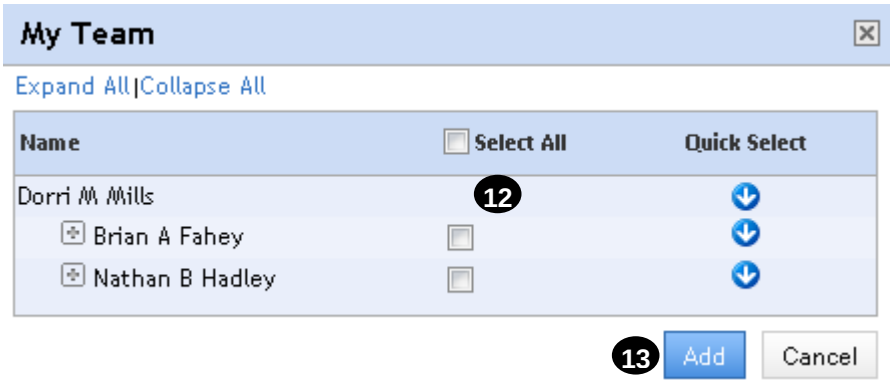
9	From the search results list, click the check the **Select** checkbox.	
10	Click **Add**.	
11	Click the Employees **Add** icon ( ).	
12	Click the checkboxes next to the employees you want to remove the item from.	
13	Click **Add**.	*Note: Click the Quick Select icon ( ) to simultaneously select all direct and/or indirect reports for the corresponding employee.*

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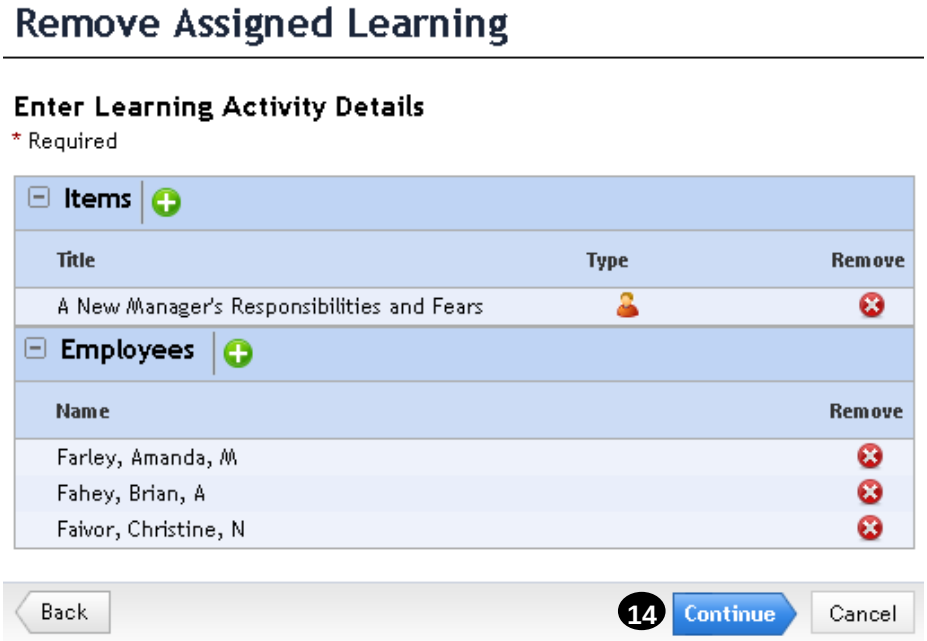
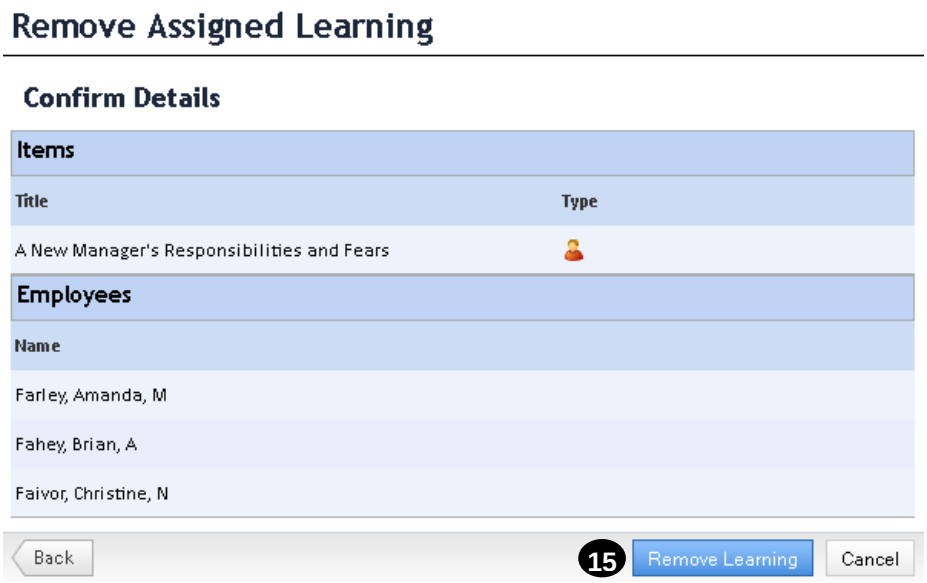
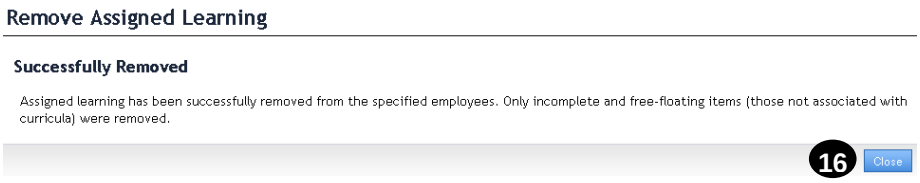
14	Click **Continue**.	
15	Review and confirm the details of the item removal. Click **Remove Learning**.	
16	A confirmation message is displayed. Click **Close**.	

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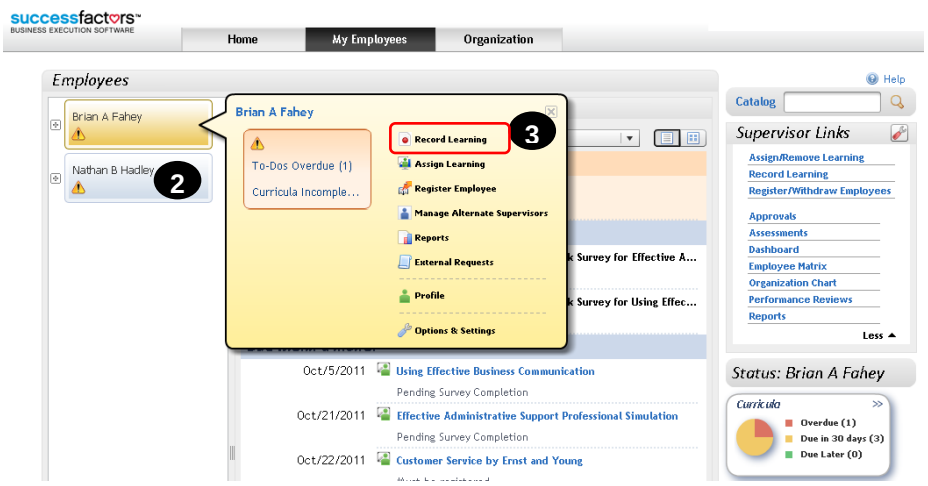
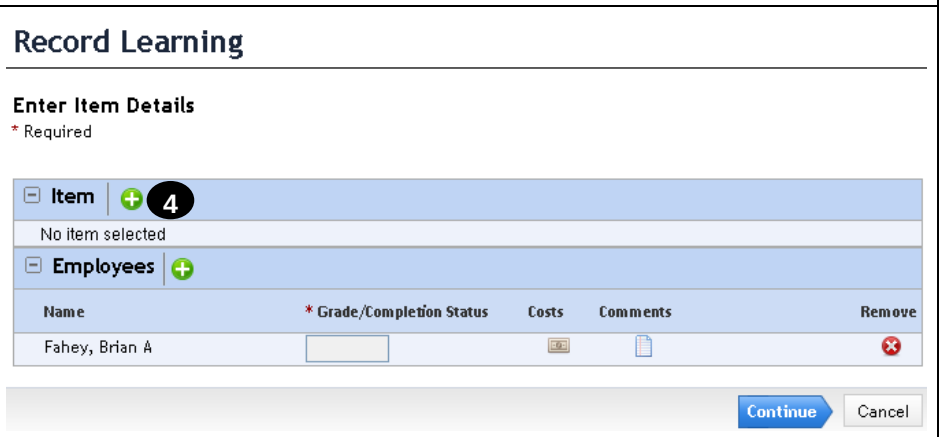
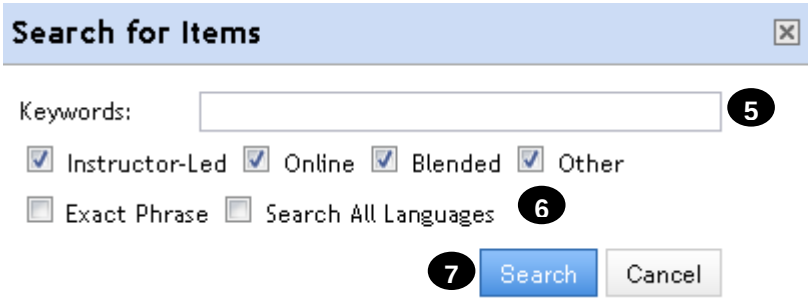
Task D. Record Item Completion for an Employee

1	From the Home page, click the **My Employees** tab.	
2 3	Hover over an employee in the employee tree. Navigate to and click the **Record Learning** link.	
4	Click the Item **Add** icon ( ).	
5 6 7	Enter keywords to search for the item to record completion for your employees. Use the checkboxes to further filter your search. Click **Search**.	

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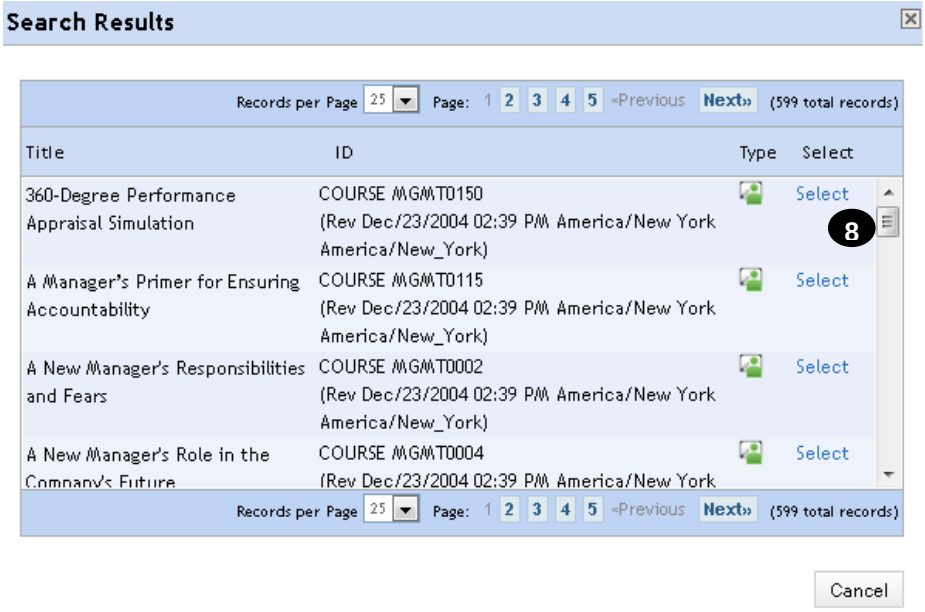
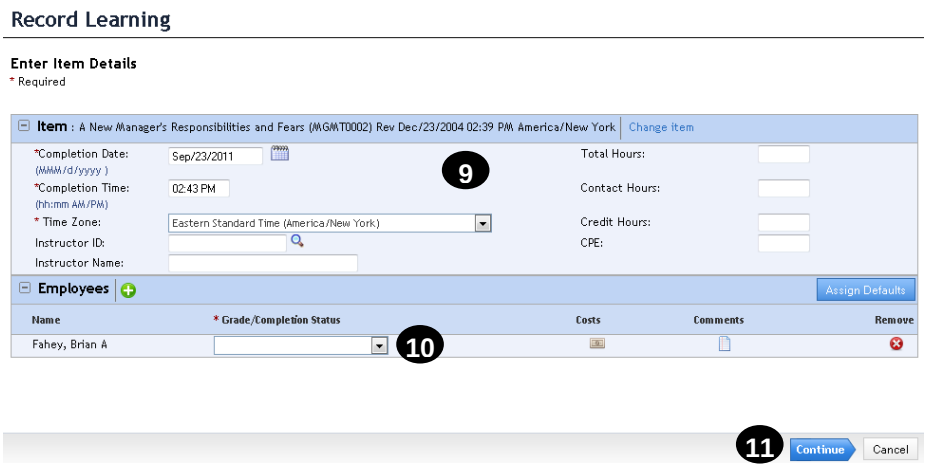
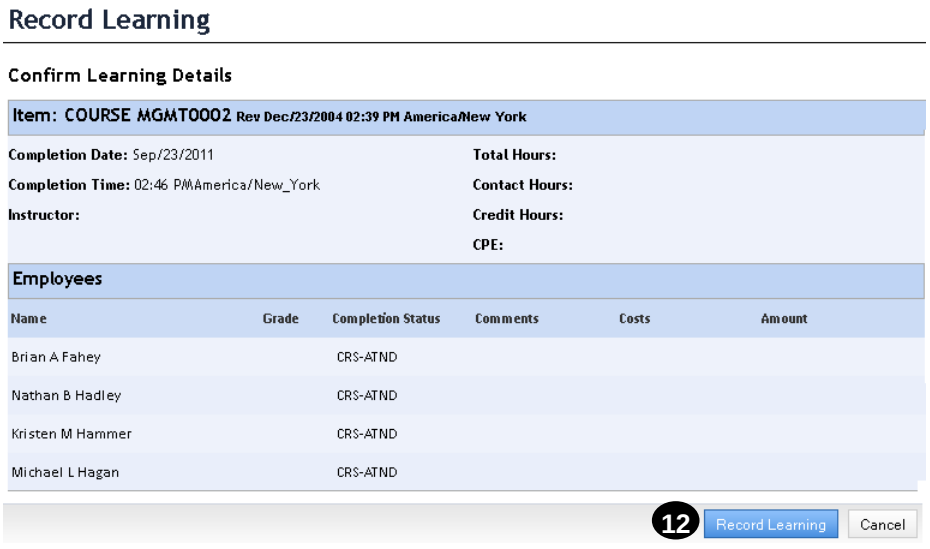
8	From the search results list, click the **Select** link.	
9 10 11	Enter all the item details. Select a Grade/ Completion Status for the employee from the drop-down menu. Click **Continue**.	 *Note: Click Assign Defaults to assign a default grade/completion status, comments, user costs, and currency to all employees selected.*
12	Confirm the record learning details. Click **Record Learning**.	

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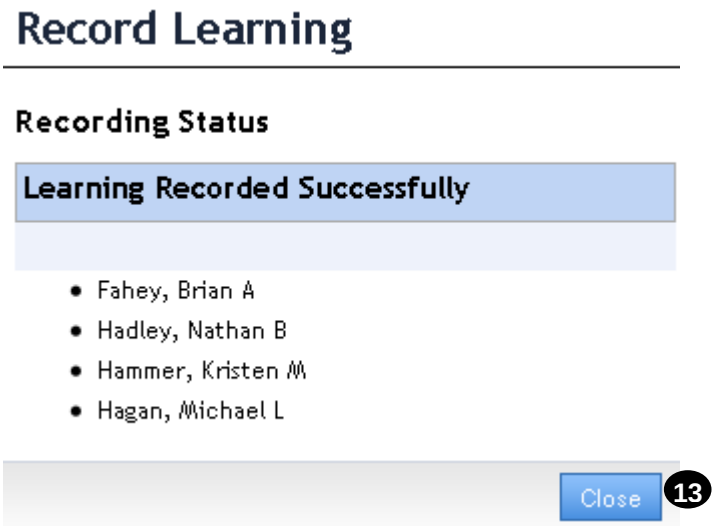
13	Learning is successfully recorded for the listed employees. Click **Close**.	

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