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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

Team Navigator Icon

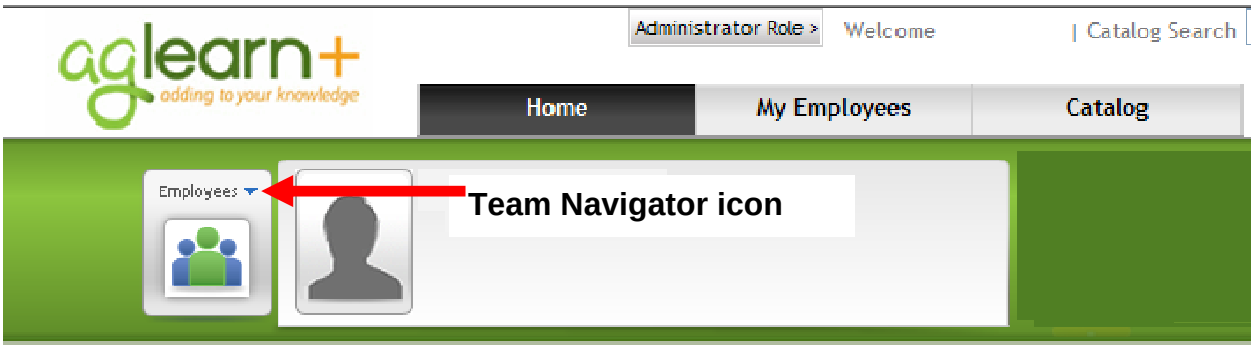


Figure 1 - The Team Navigator icon

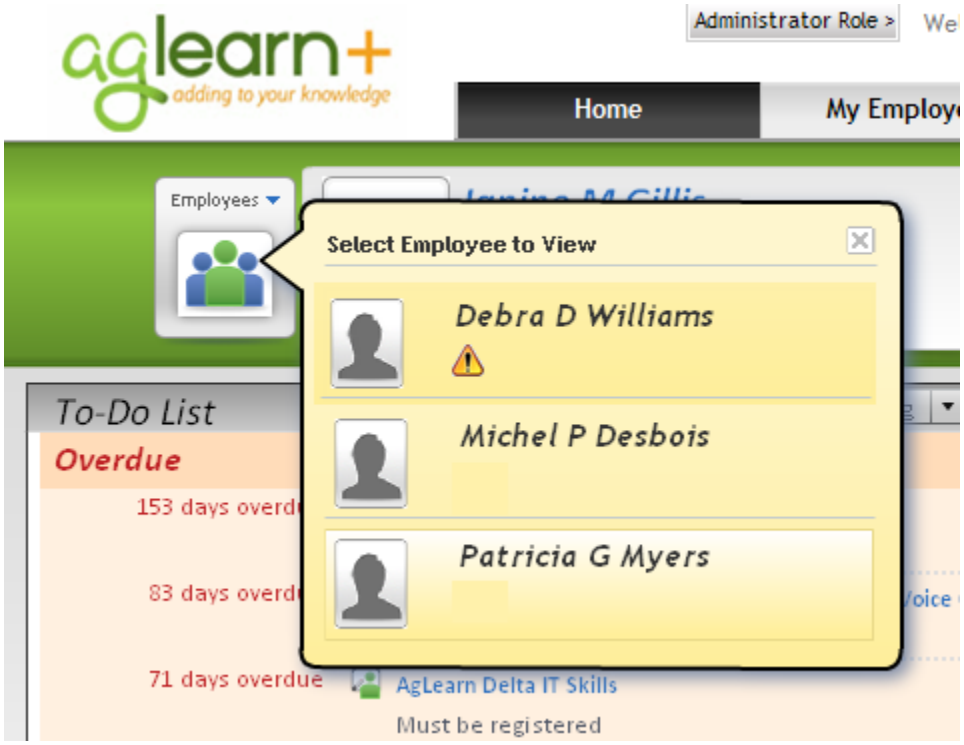
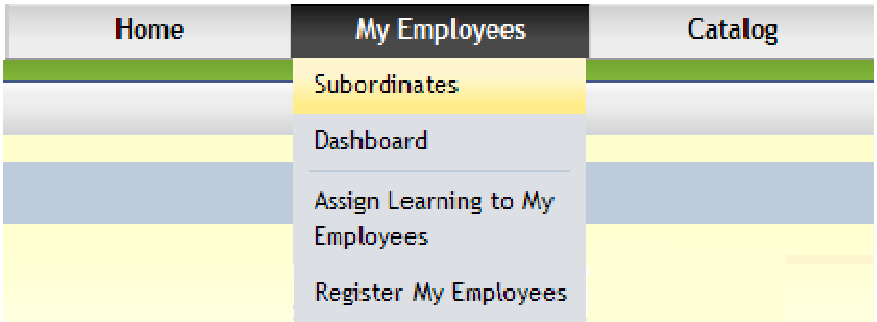


Figure 2 – The Team Navigator icon, expanded

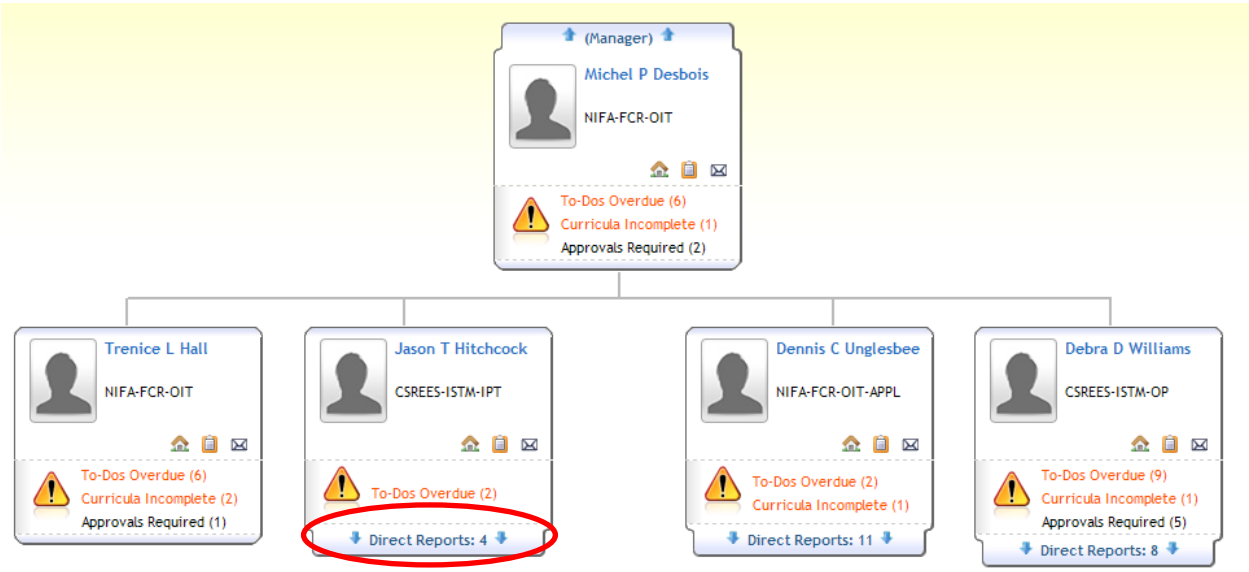
Use the **Team Navigator icon** to click on the name of a direct report to display the **Home** screen for that subordinate. Once on the Home screen, you can quickly navigate to the To-Do List, IDP, Completed Work, or SF182 Requests of the employee.

My Employees

Subordinates

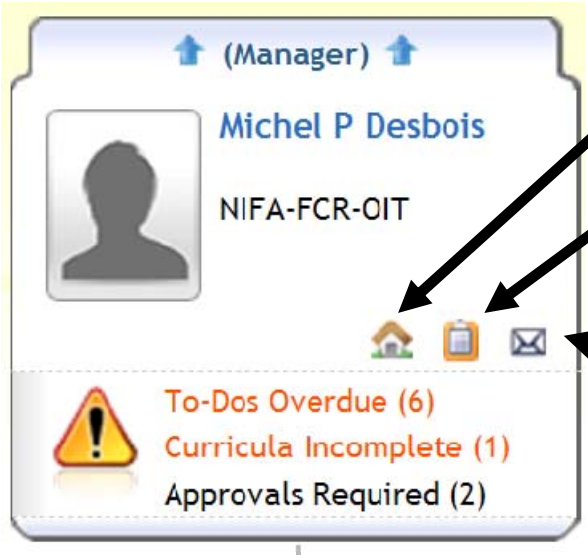


Selecting the **Subordinates** option from the **My Employees** tab will display an organizational chart of your employees. Any subordinates with direct reports will have this indicated on the chart.



NOTE

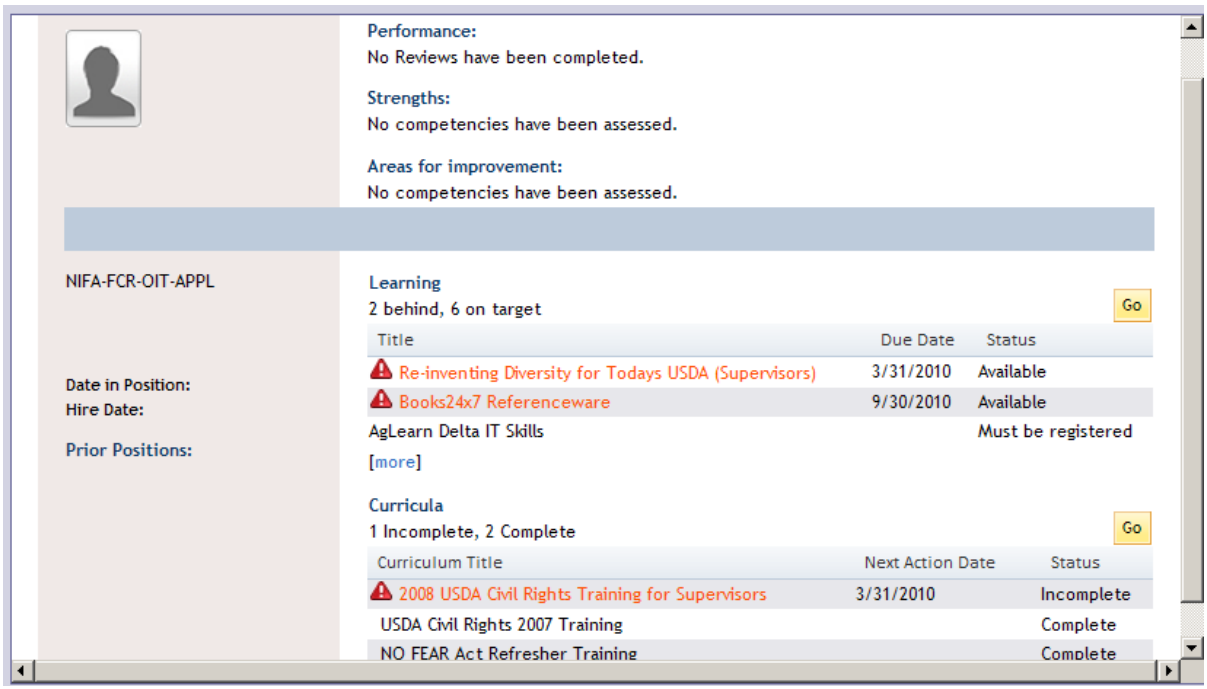
In order to see the direct reports for your subordinate, you must use the **My Employees** tab to click on **Subordinates**. Then click on the **Direct Reports** link to drill down one or more levels.



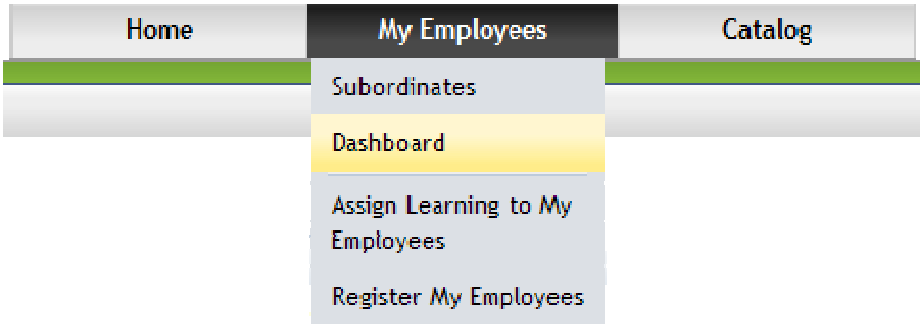
Home – Opens the **Home** page of your team member.

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.



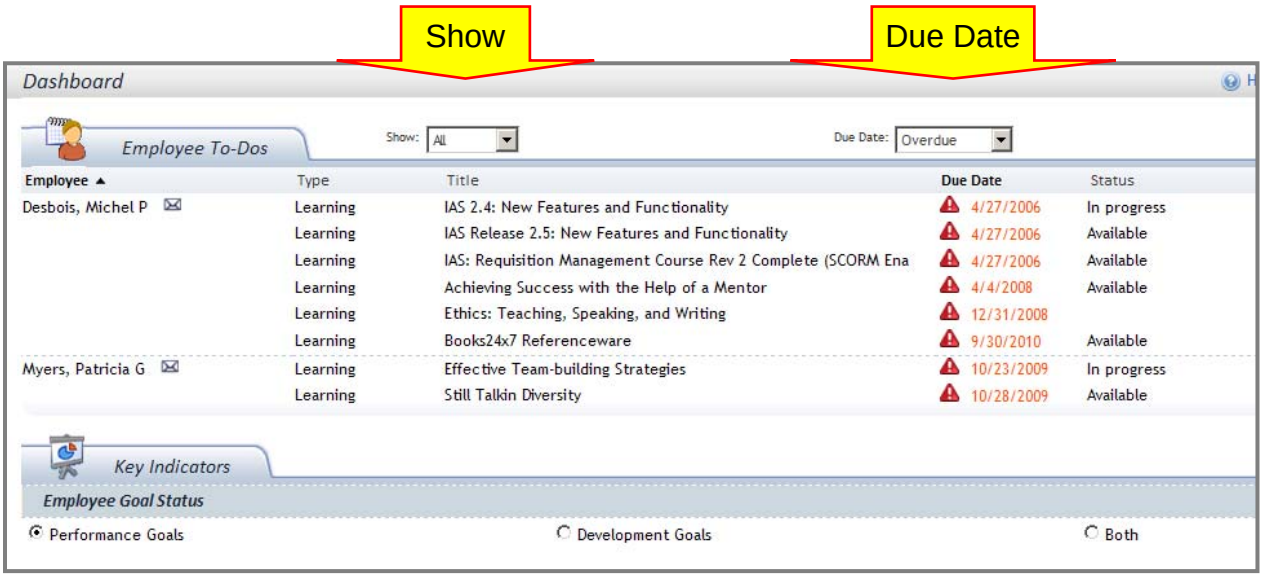
Dashboard



Selecting the **Dashboard** option from 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**.

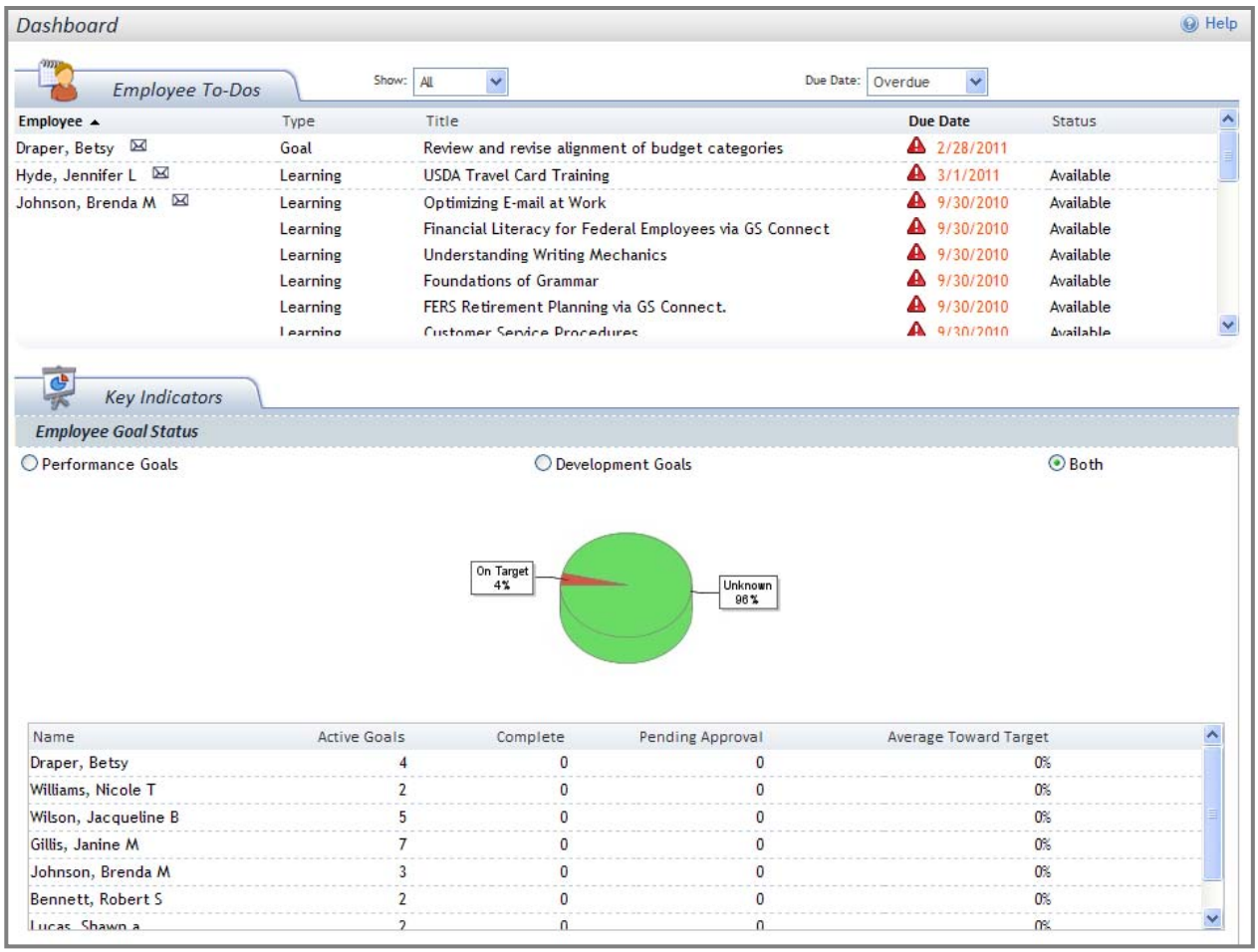
The **Employee To-Dos** section has two filter options:

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



The **Key Indicators** section has three options:

- **Performance Goals**
- **Development Goals**
- **Both**

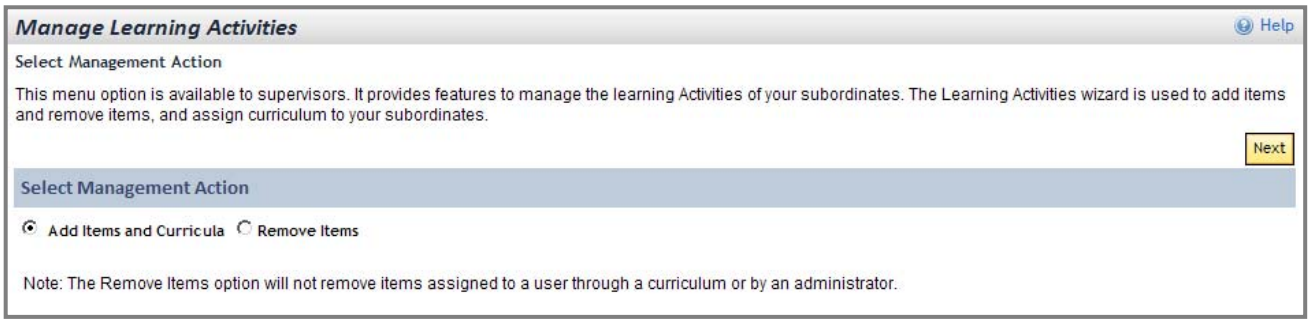


Adding to the To-Do List

Assign a Learning Item

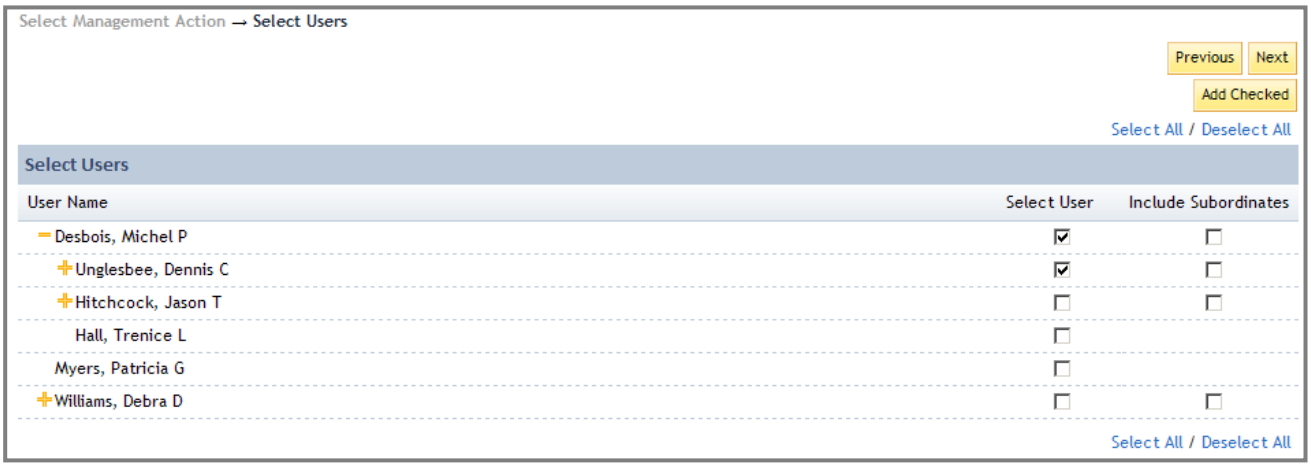
1. Hover over **My Employees**.

2. Click on **Assign Learning to My Employees**. The **Manage Learning Activities** screen will appear. You have the choice of two possible management actions:
   - Add Items and Curricula
   - Remove Items



3. Select the desired management action and click on **Next**.

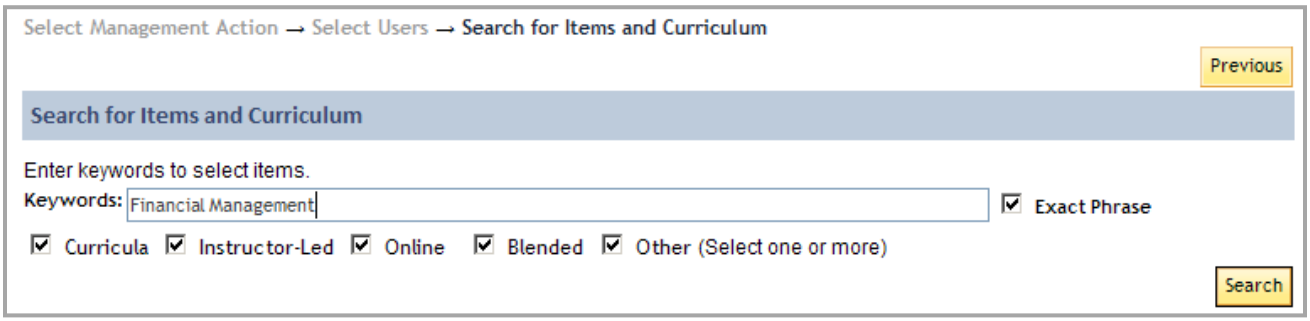
4. The **Select Users** screen will appear. Place a checkmark in the corresponding checkbox for each employee that will be assigned the training. If the employee also has subordinates that you wish to assign training to, click the **Plus** sign to expand the list.



5. Click on **Add Checked**.

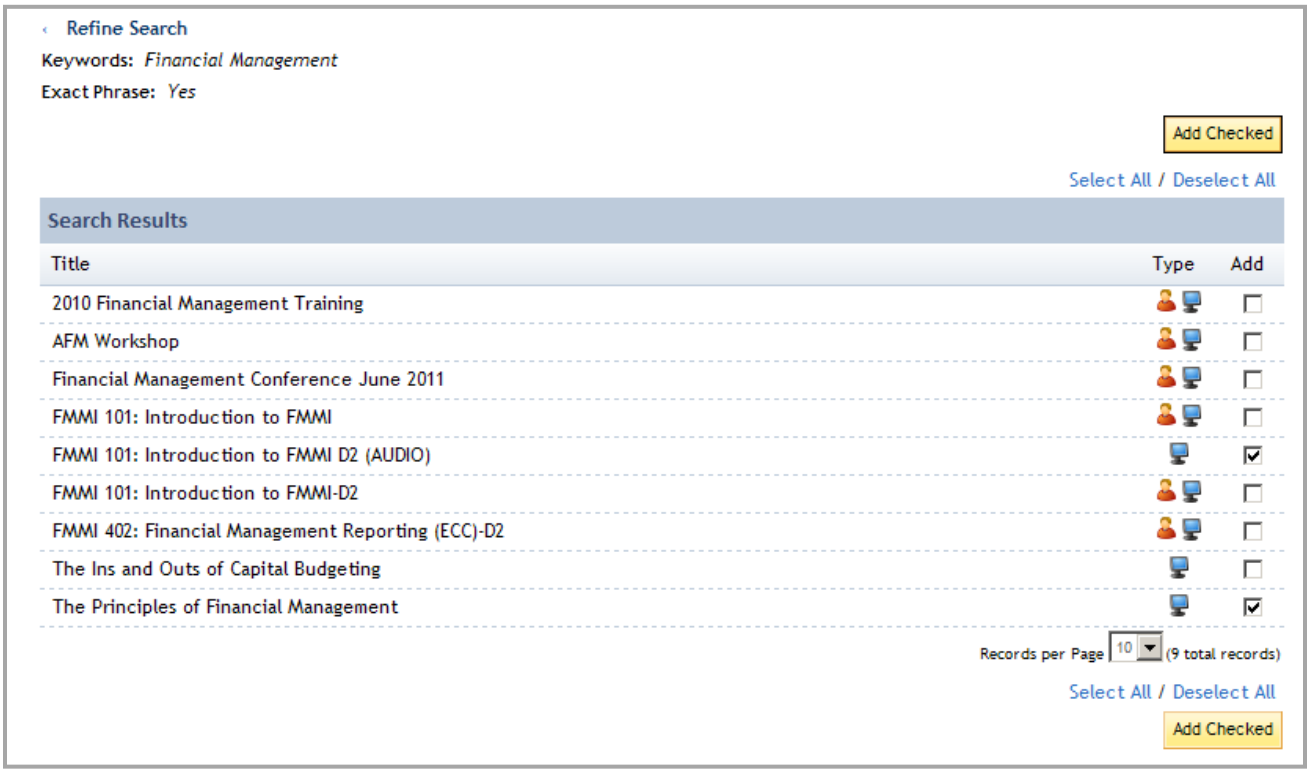
6. Click on **Next**.

7. The **Search for Items and Curriculum** screen is displayed. Enter keywords for your course or curriculum in the **Keyword** text box.

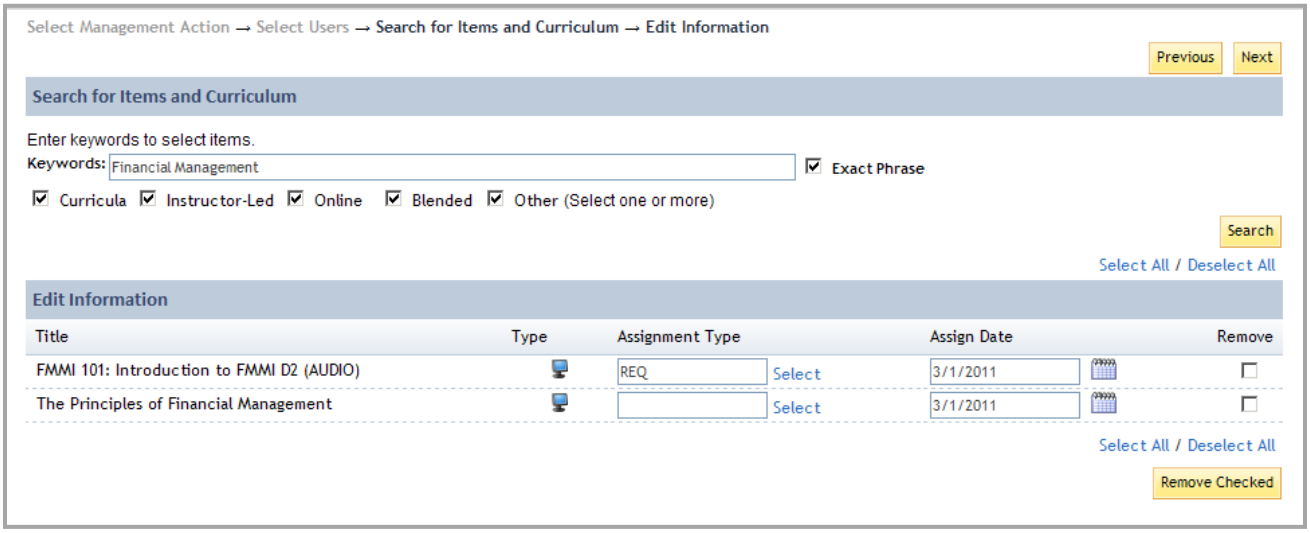


8. Click on **Search**.

9. Your search results will display. Place a checkmark in the desired course checkbox and click on **Add Checked**.

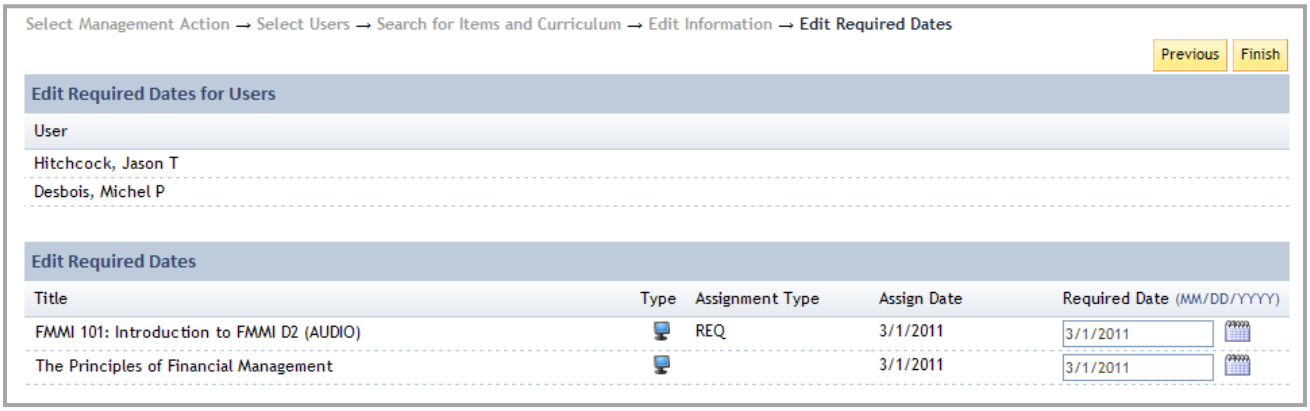


10. The **Edit Information** screen will display. Make any necessary adjustments to the **Assignment Type** field.

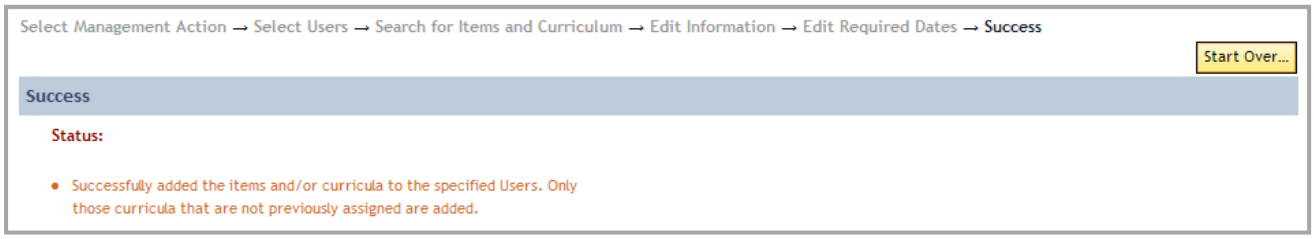


11. Click on **Next**.

12. The **Edit Required Dates** screen will display. Make any necessary adjustments to the **Required Dates** text box.



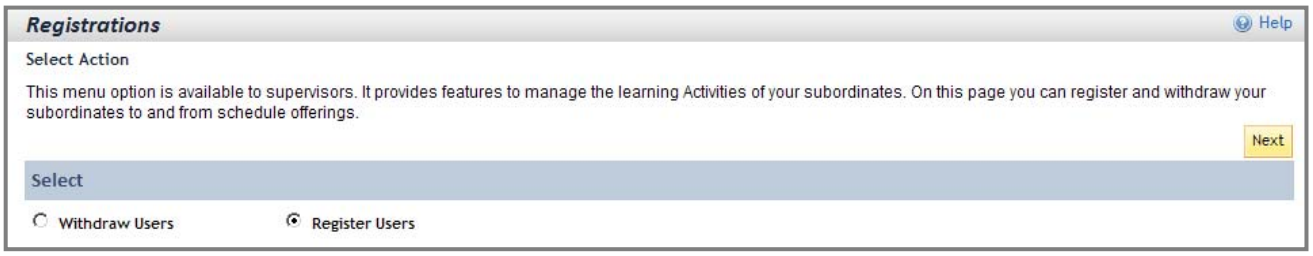
13. Click on **Finish**. You should receive a Status message indicating successful assignment.



Register in a Scheduled Offering

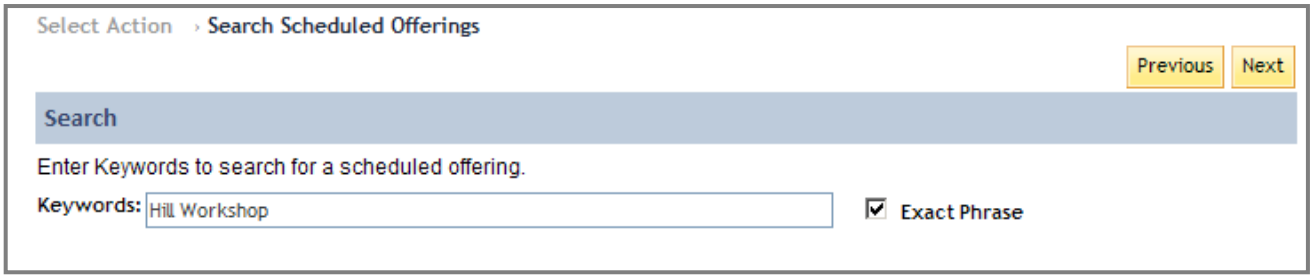
1. Hover over **My Employees**.

2. Click on **Register My Employees**. The **Registrations** screen will appear. You have the choice of two actions:
   - Withdraw Users
   - Register Users



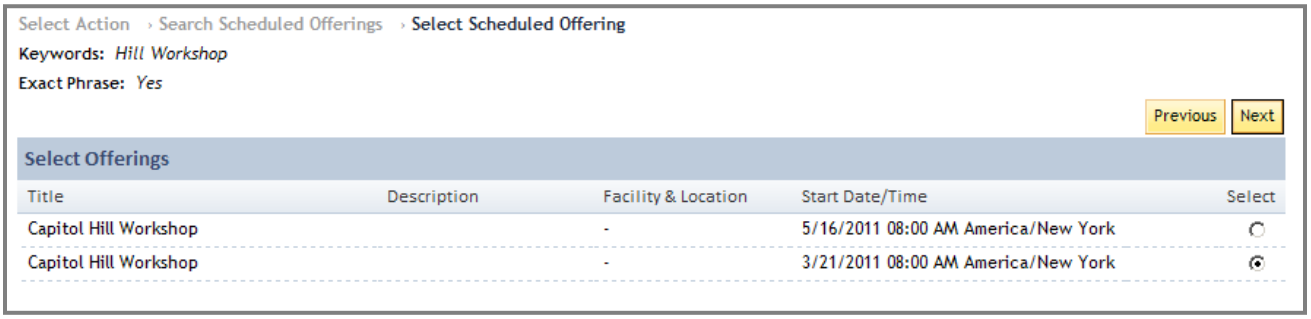
3. Click on **Next**.

4. The **Search Scheduled Offerings** screen will display. Enter keywords in the **Keywords** text box.



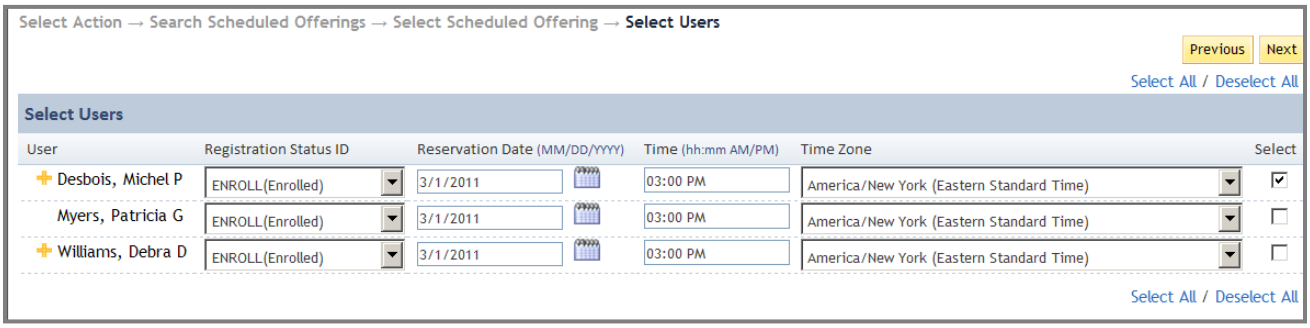
5. Click on **Next**.

6. The **Select Scheduled Offering** screen will display. Select the option that corresponds to the desired scheduled offering.



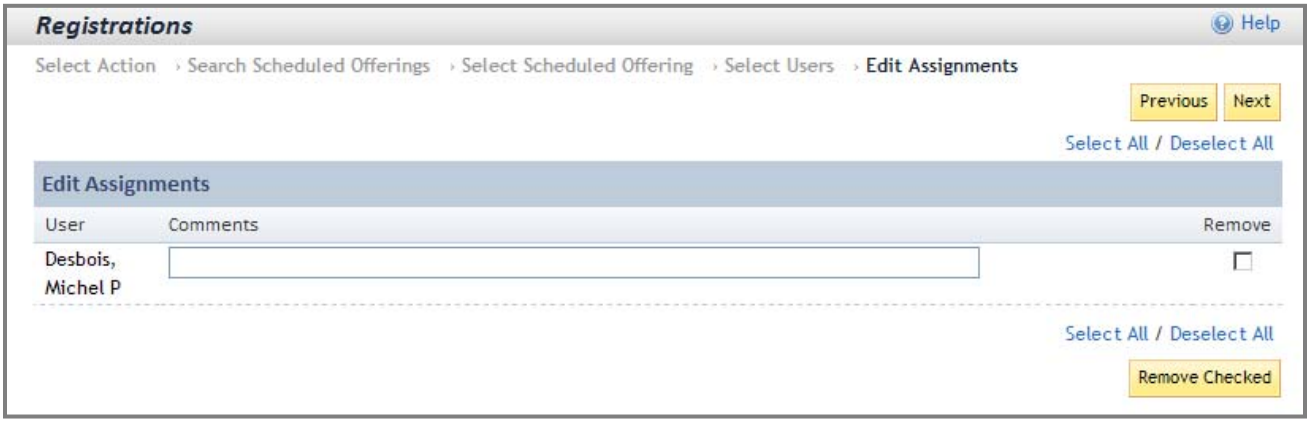
7. Click on **Next**.

8. The **Select Users** screen will display. Place a checkmark in the checkbox that corresponds to selected employees.



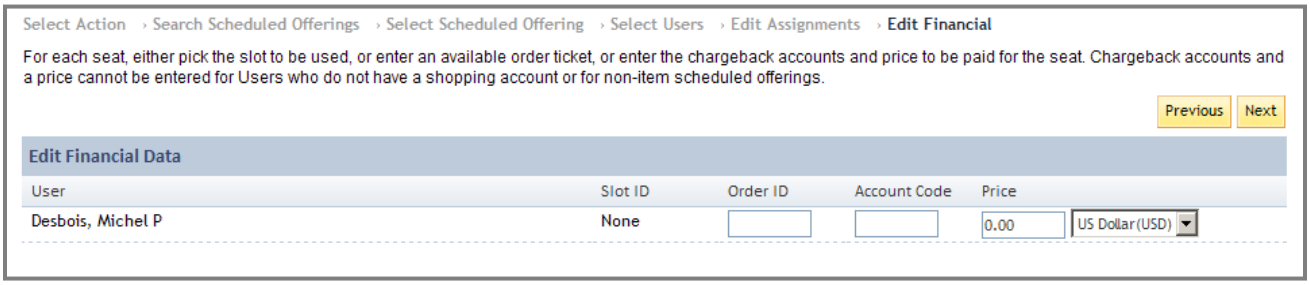
9. Click on **Next**.

10. The **Edit Assignments** screen is displayed. You have the option of adding comments for your employee.



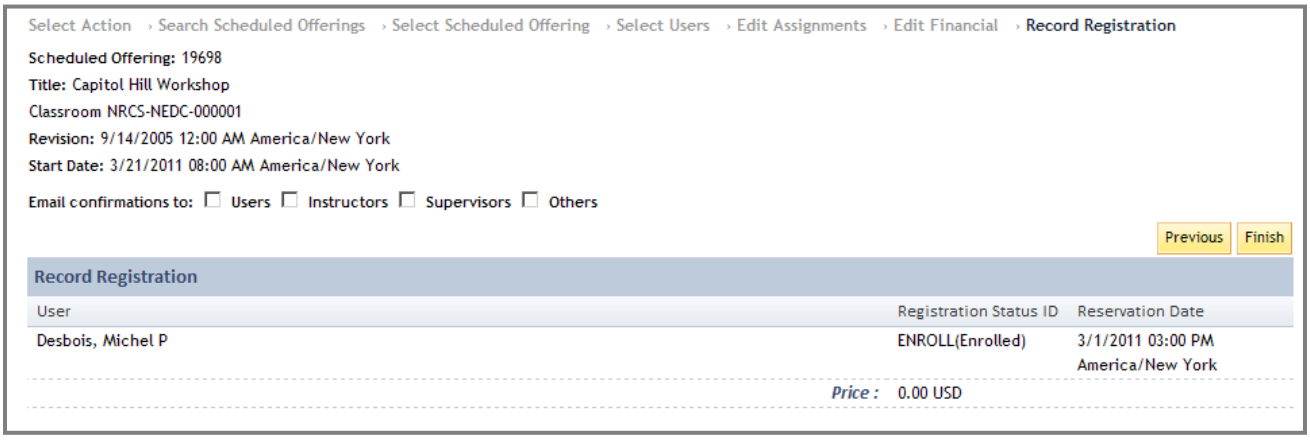
11. Click on **Next**.

12. The **Edit Financial** screen is displayed.

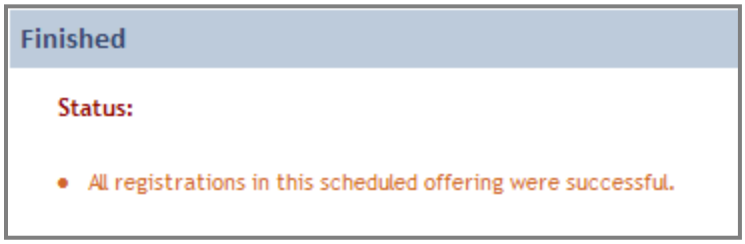


13. Click on **Next**.

14. The **Record Registration** screen is displayed. If you wish for your employee to receive a notification email, place a checkmark in the corresponding checkbox.



15. Click on **Finish**. You should receive a Status message indicating successful registration.



Approval and Disapprovals

Performance Management (IDP) Approvals

If an employee has submitted a request to their supervisor to approve their **Individual Development Plan (IDP),** it will appear in the **Performance Management Approvals** area of AgLearn. As the designated supervisor, you will also receive email notification of IDP submission.

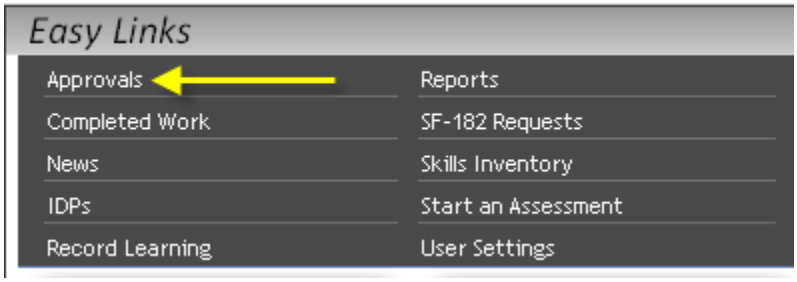
What is an IDP? An IDP represents a commitment that the organization makes to growing and developing employees. They are an important part of succession planning in that they help employees develop skills that will be needed both now and in the future. As part of long-term career planning, employees, supervisors, and training departments can work together to use IDPs to outline training and create activities that will lead to a more engaged, effective, and skilled workforce.

The use of AgLeam for developing and maintaining IDPs is encouraged because it provides an effective way for Agencies to track the number of IDPs in progress and it is linked to the employee's training record.

The USDA Office of Human Resource Management (OHRM) has posted a departmental regulation (DR) on creating IDPs. This DR can be found via the web: http://www.ocio.usda.gov/directives/doc/DR4040-410.pdf. This regulation specifies that supervisors are responsible for ensuring employees have an IDP and that the IDP remains current; providing feedback to employees about job strengths and areas for improvement; and supporting employee training and development, providing training opportunities and funding if related to the mission of USDA and ensuring funds are available.

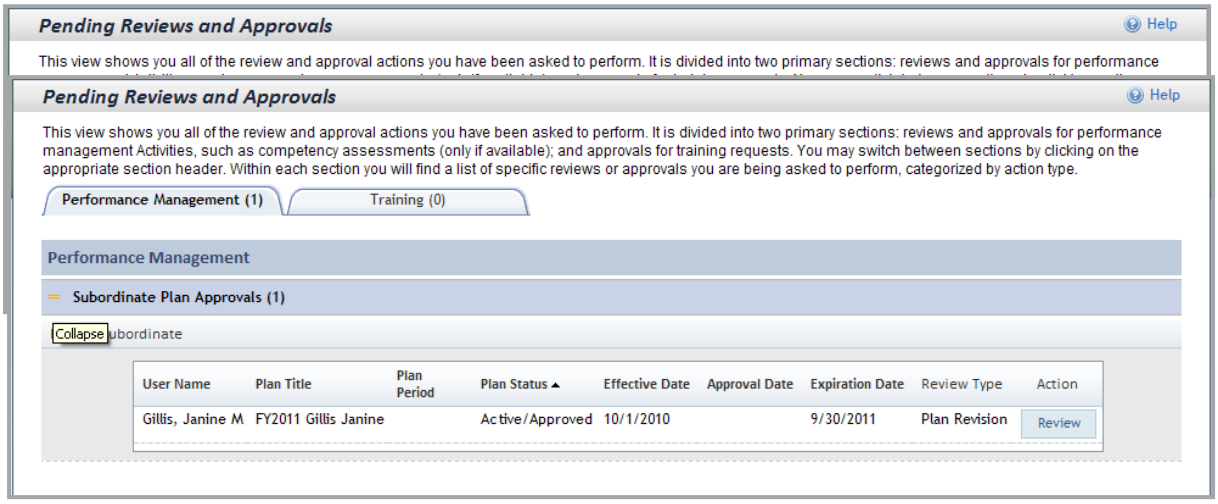
Additionally, OHRM has established a web site that provides guidance and tools for the creation and use of IDPs. This site is http://www.idp.usda.gov.

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

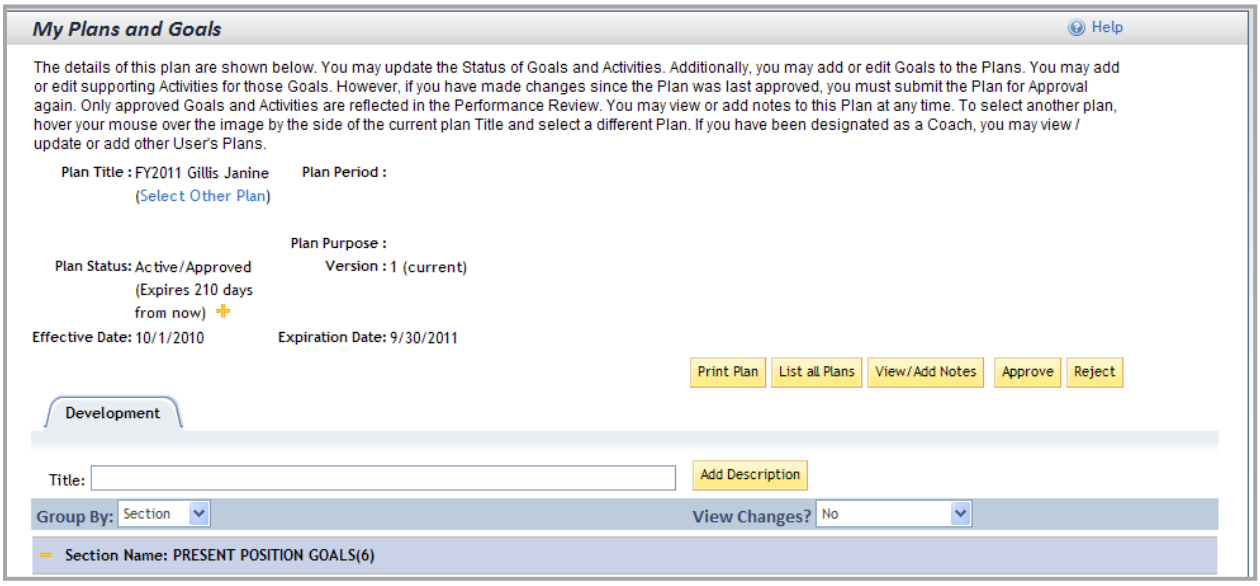


2. The **Pending Reviews and Approvals** screen will display.
3. The screen is divided into two tabs, **Performance Management** and **Training**. Click on the **Performance Management** tab.

4. If you have any subordinates that need to have an **Individual Development Plan (IDP)** approved, it will be indicated in the **Subordinates Plan Approval** section. Click on the plus (+) to expand the section.



5. Any plans that need to be reviewed will be listed. Click on the corresponding **Review** button to open the IDP for review.



6. The IDP of the employee is displayed. If this submission is an update to a previously approved plan, click on the drop-down selection arrow associated with **View Changes?** selection box to see what modifications have been made to the IDP since last approval.

My Plans and Goals

Help

The details of this plan are shown below. You may update the Status of Goals and Activities. Additionally, you may add or edit Goals to the Plans. You may add or edit supporting Activities for those Goals. However, if you have made changes since the Plan was last approved, you must submit the Plan for Approval again. Only approved Goals and Activities are reflected in the Performance Review. You may view or add notes to this Plan at any time. To select another plan, hover your mouse over the image by the side of the current plan Title and select a different Plan. If you have been designated as a Coach, you may view / update or add other User's Plans.

Plan Title : FY2011 Gillis Janine (Select Other Plan)

Plan Period :

Plan Purpose :

Version : 2 (current)

Plan Status: Active/Approved (Expires 206 days from now)

Effective Date: 10/1/2010

Expiration Date: 9/30/2011

Print Plan | List all Plans | View/Add Notes

Development

Title:

Add Description

Group By: Section

View Changes? Since Last Approval

Field Chooser | New Goal

Section Name: PRESENT POSITION GOALS(6)

Goal Name	Changes	Action	Remove
Communications Oral	No	View/Add Notes Move Goal Edit	
Communications Written	No	View/Add Notes Move Goal Edit	
Course Development	No	View/Add Notes Move Goal Edit	
Professional Development	No	View/Add Notes Move Goal Edit	
Program Management and Evaluation	No	View/Add Notes Move Goal Edit	

Details

Activities (4)

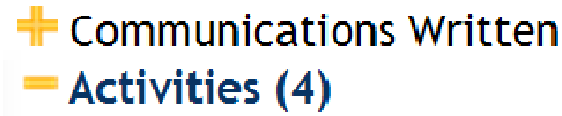
Add Activity

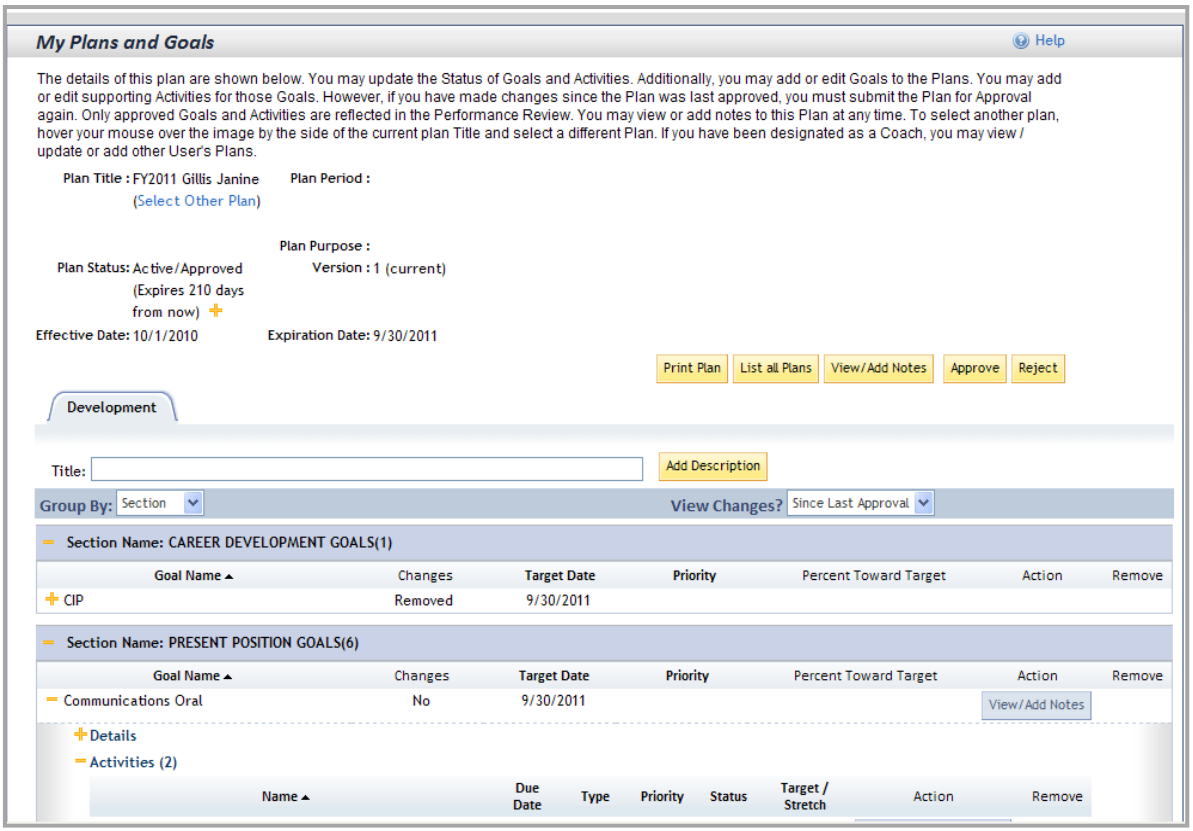
Name	Due Date	Type	Priority	Status	Target / Stretch	Action	Remove
Book [ASTD Handbook of Measuring and Evaluating Training]	9/30/2011	External		Not Started		View/Add Notes Edit Update Activity Status	
Book [Implementing the Four Levels: A Practical Guide for Effective Evaluation of Training Programs]	9/30/2011	External		Not Started		View/Add Notes Edit Update Activity Status	
Book [Online Assessment and Measurement: Foundations and Challenges]	9/30/2011	External		Not Started		View/Add Notes Edit Update Activity Status	
Measurement: Assessment and Metrics	9/30/2011	Item		Available		View/Add Notes Edit Launch content View Item Details	

Changes (0)

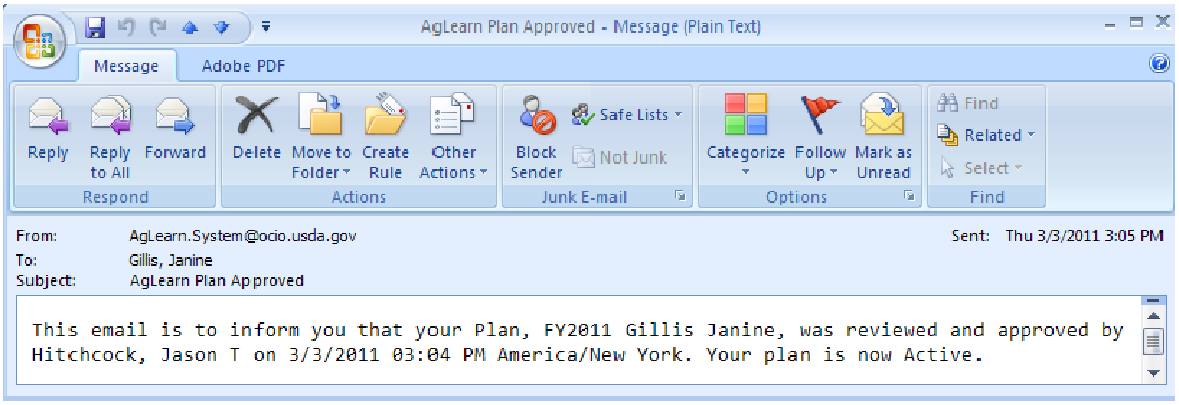
Special Project	No	View/Add Notes Move Goal Edit	

7. The plan will contain **Goals**, with each goal assigned to either the **Present Position** section or **Career Development Goals** section. Each Goal will have one or more **Activities**. Activities can be Learning Items within AgLearn (**internal**) or activities outside of AgLearn (**external**). Click the **plus** and **minus** signs to expand and contract to view all the Goals and Activities.





8. After reviewing the plan, make a determination whether or not to **Approve** or **Reject** the plan and click on the corresponding button. An email notification will be sent by AgLearn to the employee indicating your decision.



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:

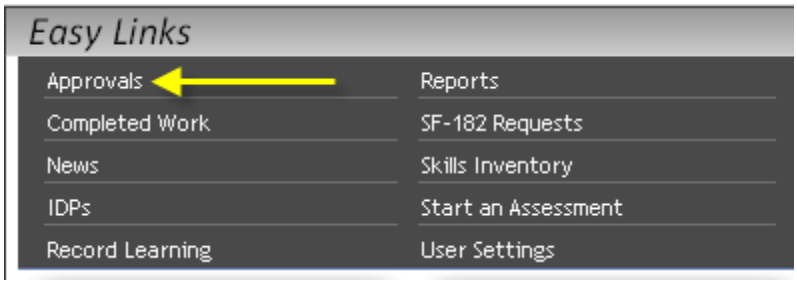
http://www.afm.ars.usda.gov/forms/EMPDEV/SF182-Instructions.PDF

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 disapprove a SF182 request

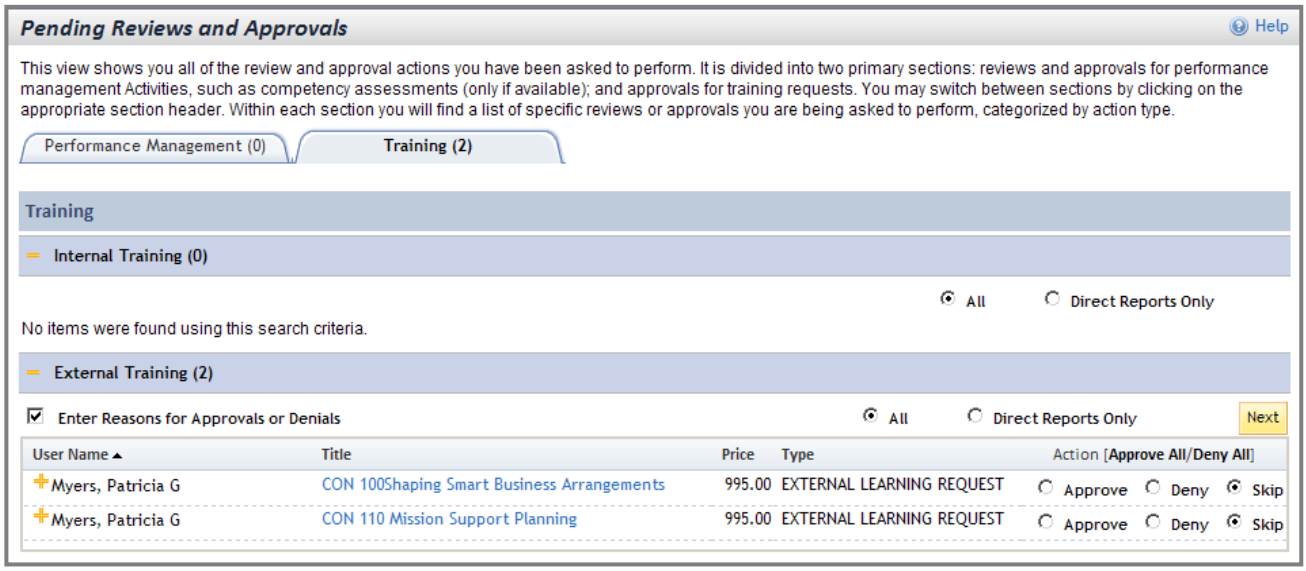
1. Locate and click on **Approvals**, found in the **Easy Links** section located on the right-hand side of the screen.



2. The **Pending Reviews and Approvals** screen will display.

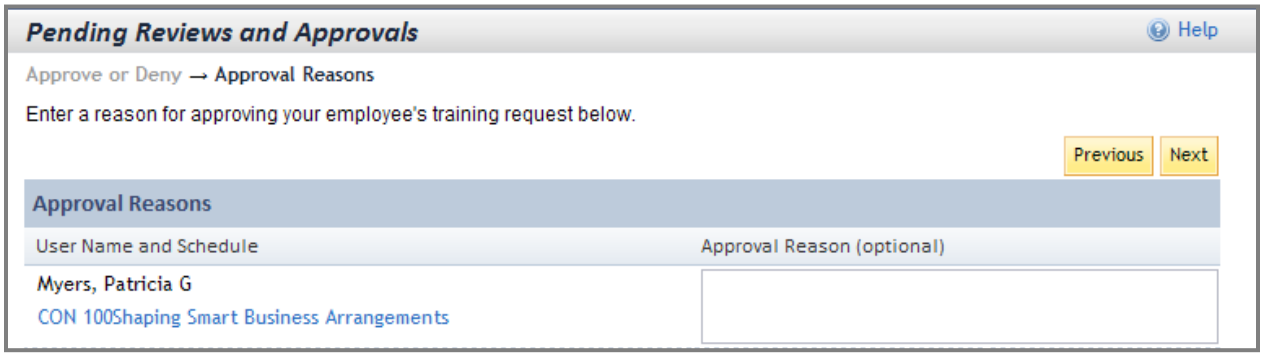
3. The screen is divided into two tabs, **Performance Management** and **Training**. Click on the **Training** tab.

4. 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.

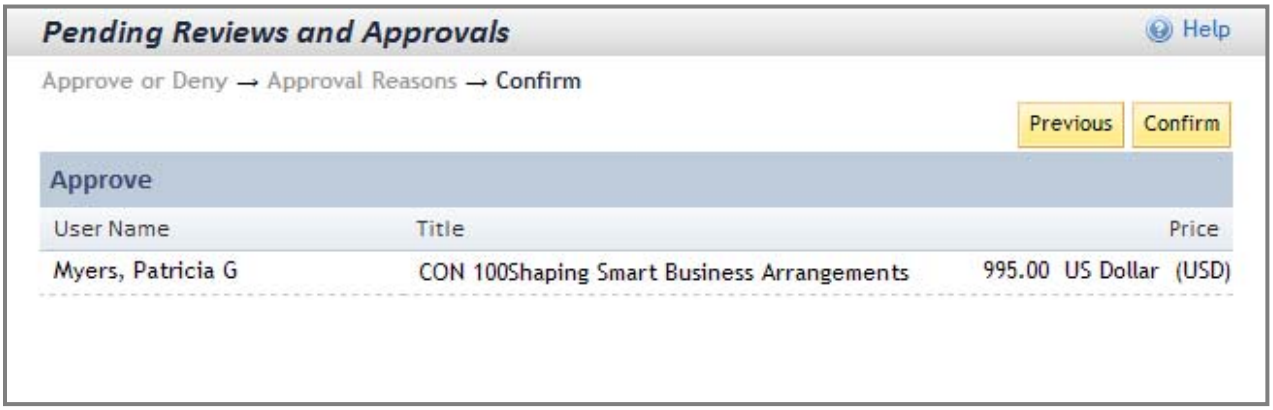


5. To approve /disapprove a request, select that option for the employee and click on **Next**.

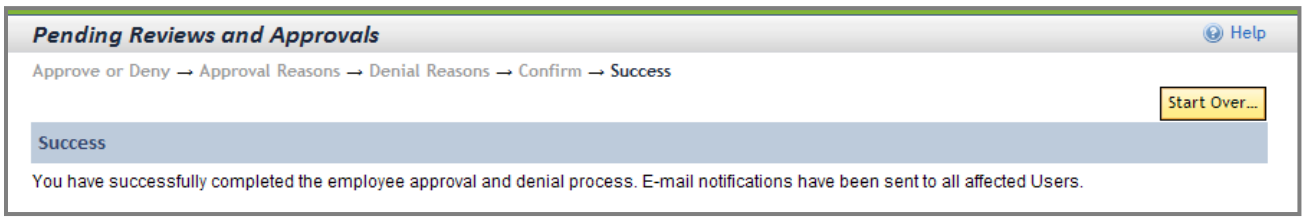
6. The **Approval Reasons** screen will display. If approving, you can enter optional approval comments. If denying, you can enter an optional denial reason.



7. Click on **Next**.
8. The **Confirm** screen will display. Click on the **Confirm** button to finalize.

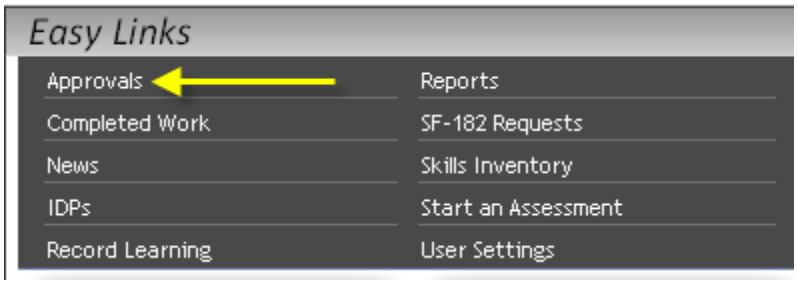


9. You should receive a status message indicating successful approval.



Approve or disapprove a Scheduled Offering Registration

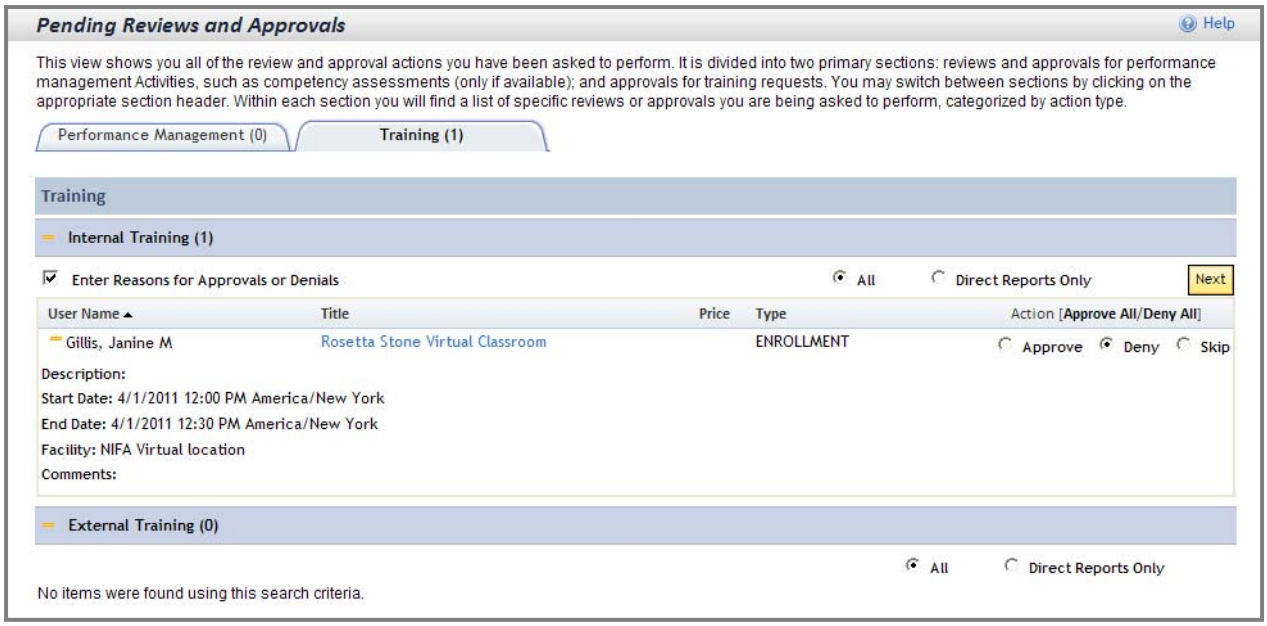
1. Locate and click on **Approvals**, found in the **Easy Links** section located on the right-hand side of the screen.



2. The **Pending Reviews and Approvals** screen will display.

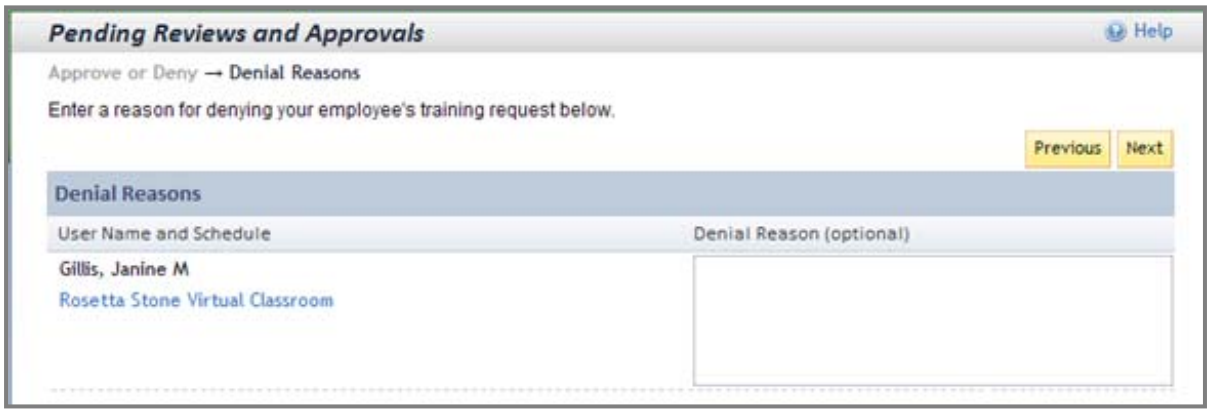
3. The screen is divided into two tabs, **Performance Management** and **Training**. Click on the **Training** tab.

4. The **Training** tab contains sections for **Internal Training** and **External Training**. To see any pending requests for class registration, click on the plus sign associated with **Internal Training** to expand the lists of employees with pending registration requests**. NOTE:** Clicking on the plus sign associated with the **name of the employee** expands the registration details for that particular request.



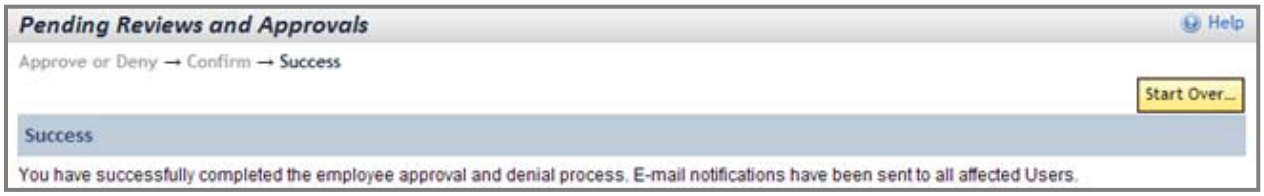
5. Select the **Approve** or **Deny** option and click on **Next**.

6. The **Approve Reason** or **Deny Reason** screen will display. If approving, you can enter optional approval comments. If denying, you can enter an optional denial reason. Click on **Next.**



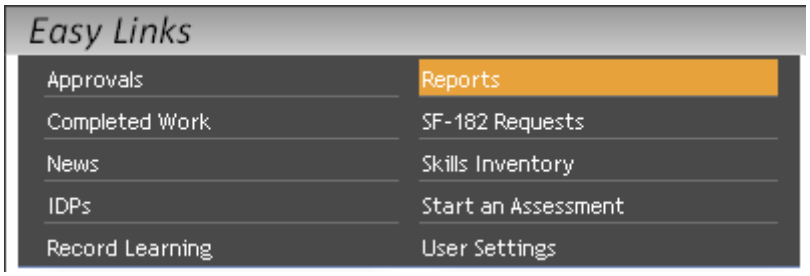
7. The **Confirm** screen will display. Click on the **Confirm** button.

8. You should see a message confirming your action.

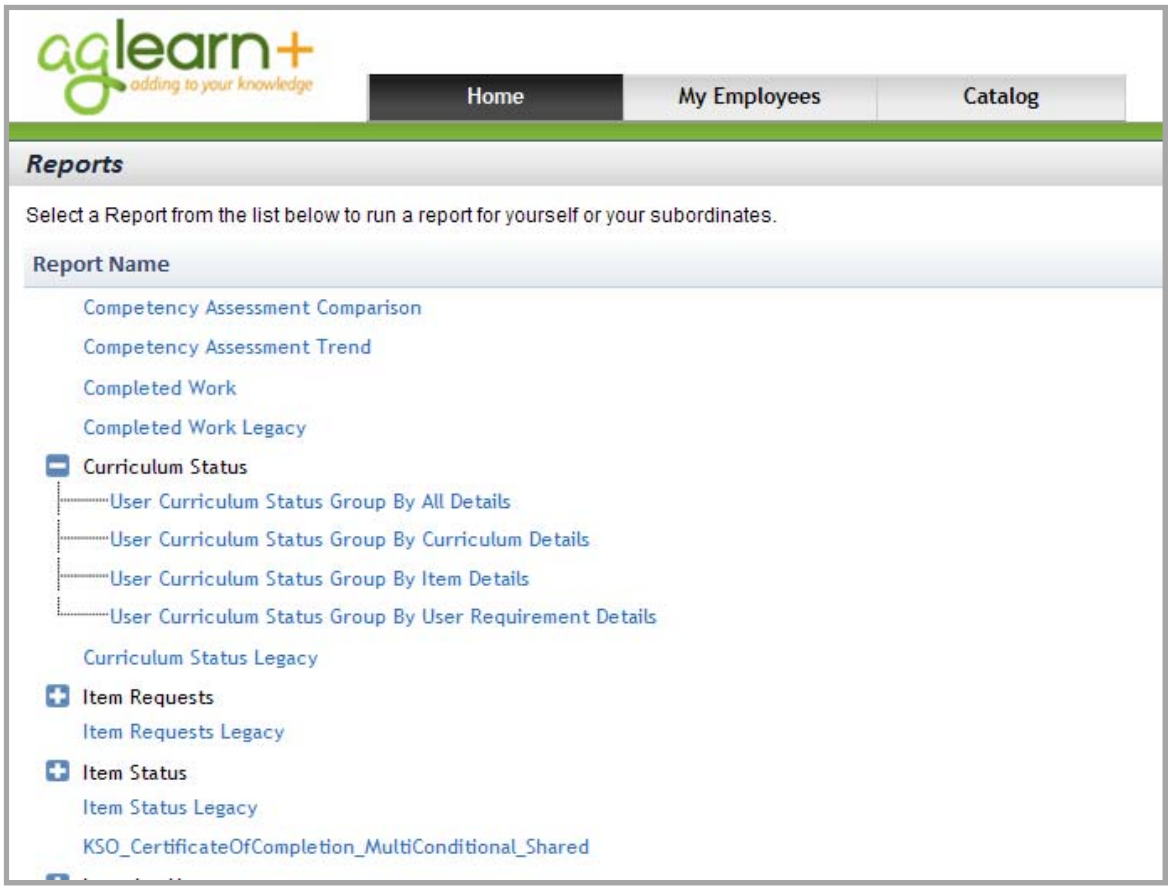


Reports

You can navigate to reports via **Easy Links**, located on the right-hand side of the **Home** 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.



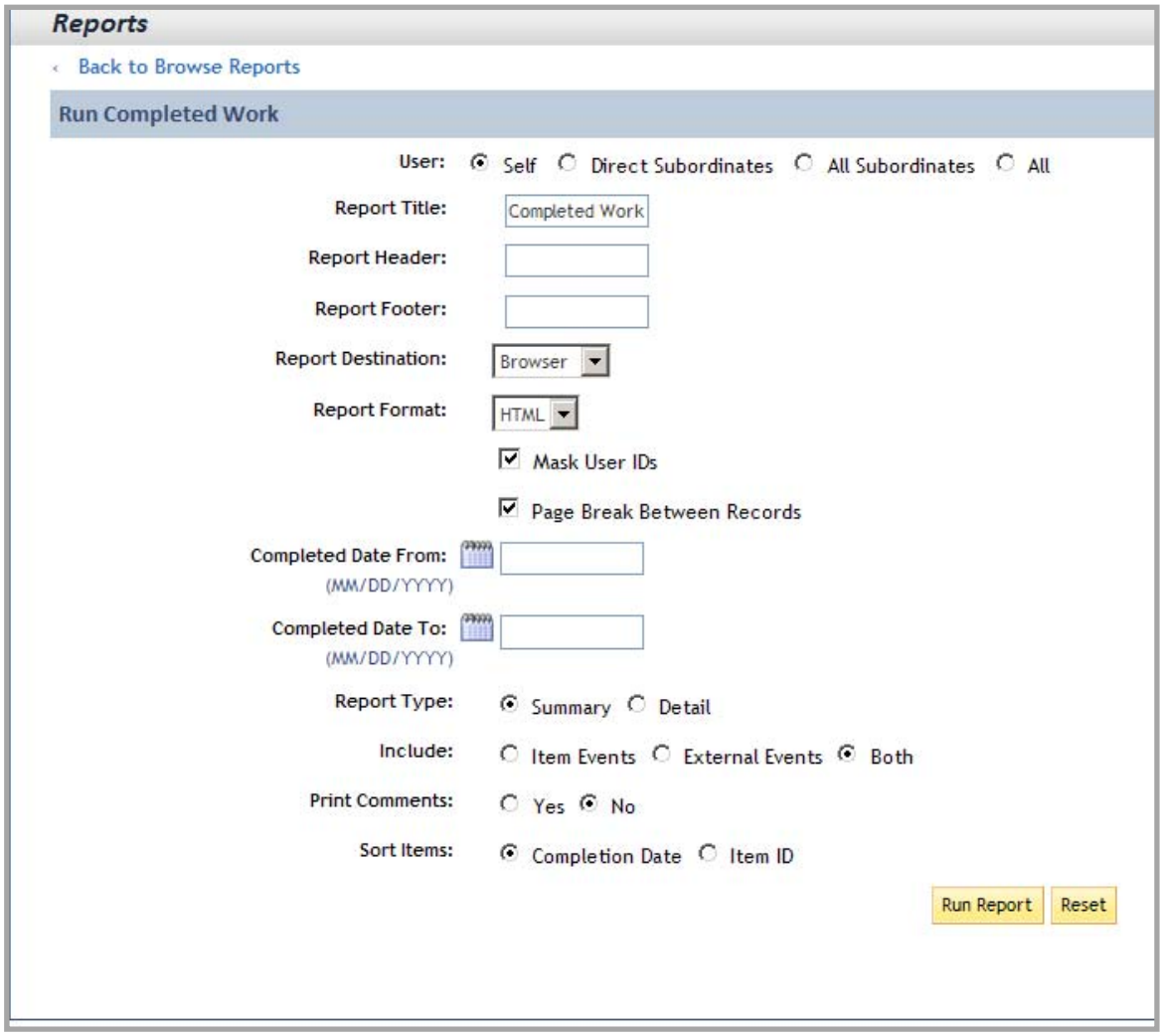
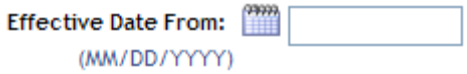
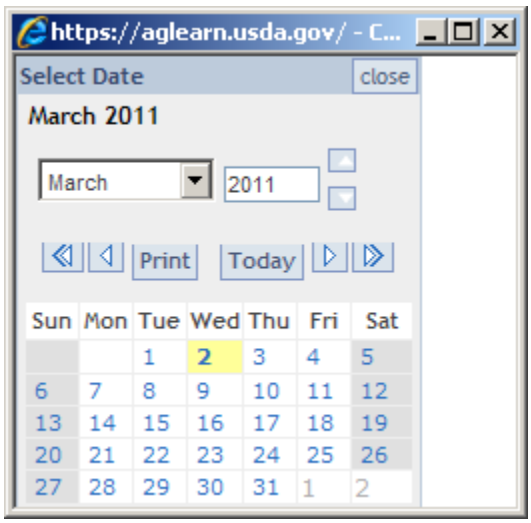


Figure 3 Run Report screen for Completed Work Report



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