

MANAGER'S PROXY

User Guide

hr.uconn.edu/learningatwork

Updated: March 2022

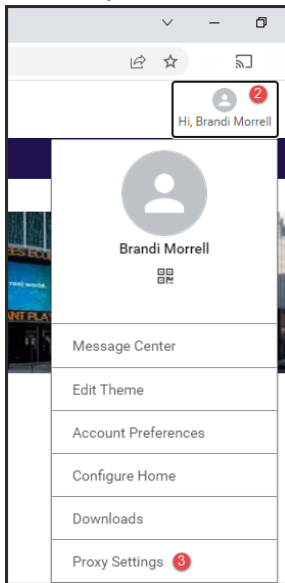


learningatwork@uconn.edu

Learning@Work: Act as Proxy

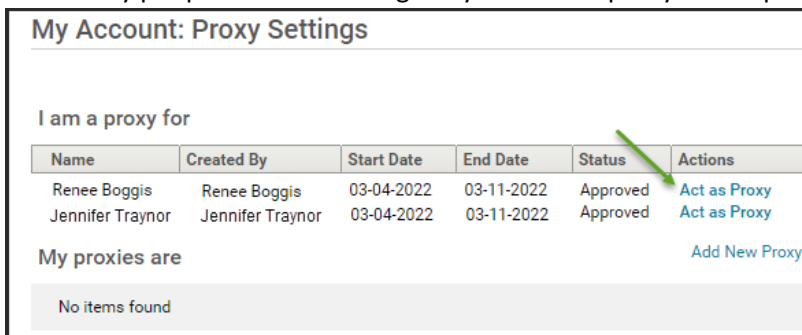
Note: Acting as proxy will take over the person's instance if both are logged into the system at the same time.

1. Log in using your netID and netID password
2. Click on your name in the upper right corner



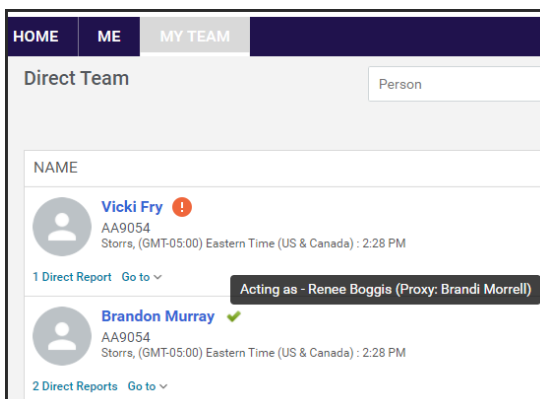
3. Select *Proxy Settings*
4. Select the person you would like to proxy for (e.g. Renee Boggis).

Note: Only people who have assigned you as their proxy will display.

A screenshot of the "My Account: Proxy Settings" page. It features a section titled "I am a proxy for" containing a table with columns: Name, Created By, Start Date, End Date, Status, and Actions. A green arrow points to the "Act as Proxy" link in the Actions column for Renee Boggis. Below the table is a section titled "My proxies are" with a link "Add New Proxy" and a message "No items found".

Name	Created By	Start Date	End Date	Status	Actions
Renee Boggis	Renee Boggis	03-04-2022	03-11-2022	Approved	Act as Proxy
Jennifer Traynor	Jennifer Traynor	03-04-2022	03-11-2022	Approved	Act as Proxy

5. You are now acting "as proxy"

A screenshot of the "Direct Team" page in a Learning@Work application. The page shows a list of team members. The first member is Vicki Fry, with a red exclamation mark icon. Below her name, there is a notification box that says "Acting as - Renee Boggis (Proxy: Brandi Morrell)". The second member is Brandon Murray, with a green checkmark icon.

HOME ME MY TEAM

Direct Team Person

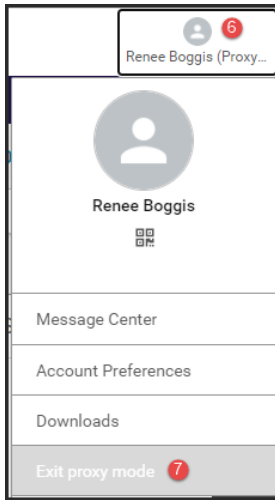
NAME

Vicki Fry !
AA9054
Storrs, (GMT-05:00) Eastern Time (US & Canada) : 2:28 PM
1 Direct Report Go to v

Brandon Murray ✓
AA9054
Storrs, (GMT-05:00) Eastern Time (US & Canada) : 2:28 PM
2 Direct Reports Go to v

Acting as - Renee Boggis (Proxy: Brandi Morrell)

6. Turn off by clicking on the person's name in top right corner
7. Click *Exit Proxy Mode*



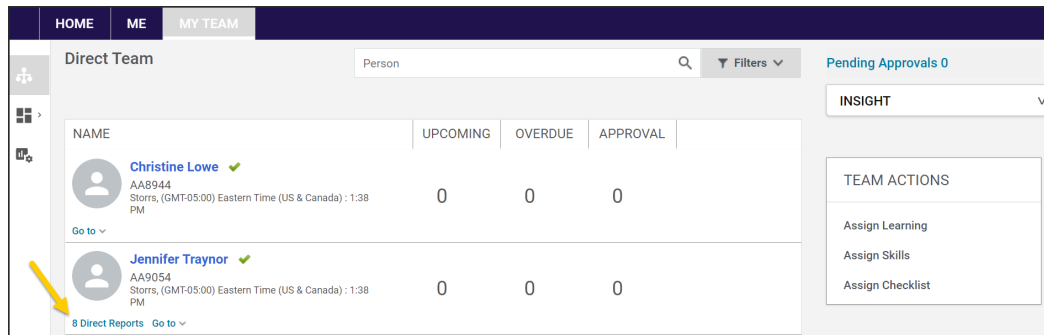
Home Menu Overview



	Home Page	Lists courses you are registered for as a learner as well as recent courses you completed as a learner.										
	My Plan	View Interactive Learner dashboard with filtering options.										
	My Team	List of Direct Team (same as)										
	Direct Team	<p>Names of direct reports and number of upcoming and overdue trainings. To view the trainings, click the # in the column.</p> <p>To view the employees supervised by your direct report, click # Direct Reports under the employee's name</p> <table border="1"> <thead> <tr> <th>NAME</th> <th>UPCOMING</th> <th>OVERDUE</th> </tr> </thead> <tbody> <tr> <td> Anna Adams ✓ 6006UH Storrs, (GMT-05:00) Eastern Time (US & Canada) : 2:50 PM 5 Direct Reports Go to </td> <td>0</td> <td>0</td> </tr> </tbody> </table>	NAME	UPCOMING	OVERDUE	 Anna Adams ✓ 6006UH Storrs, (GMT-05:00) Eastern Time (US & Canada) : 2:50 PM 5 Direct Reports Go to	0	0				
NAME	UPCOMING	OVERDUE										
 Anna Adams ✓ 6006UH Storrs, (GMT-05:00) Eastern Time (US & Canada) : 2:50 PM 5 Direct Reports Go to	0	0										
	Dashboards	<i>Not in use</i>										
	Analytics	<p>Listing of reports (select category and search by report name)</p> <table border="1"> <thead> <tr> <th>Favorite (1)</th> <th>Search By Report Name / Description / Created By</th> </tr> </thead> <tbody> <tr> <td>Recently Viewed (2)</td> <td>Default</td> </tr> <tr> <td>All (19)</td> <td>Set Default</td> </tr> <tr> <td>Favorite (1)</td> <td>Set Default</td> </tr> <tr> <td>Scheduled</td> <td>Set Default</td> </tr> </tbody> </table>	Favorite (1)	Search By Report Name / Description / Created By	Recently Viewed (2)	Default	All (19)	Set Default	Favorite (1)	Set Default	Scheduled	Set Default
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Scheduled	Set Default											

My Team – Dashboard Overview

Managers are granted access to the *Team Dashboard*. The dashboard view provides a high level overview of your teams learning information. Team members with up-to-date training plans will display a green checkmark with a note: *On Target*. If a team member has any items outstanding or overdue, you will see a red exclamation mark and note which reads: *Requires your attention*.

Click on the activities to see the specifics (e.g. Upcoming Activities, Overdue Activities, etc.). Unit level managers and above have access to their direct reports as well as the department managers' teams.



NAME	UPCOMING	OVERDUE	APPROVAL
 Christine Lowe ✓ AA8944 Storrs, (GMT-05:00) Eastern Time (US & Canada) : 1:38 PM Go to ▾	0	0	0
 Jennifer Traynor ✓ AA9054 Storrs, (GMT-05:00) Eastern Time (US & Canada) : 1:38 PM Go to ▾	0	0	0

8 Direct Reports Go to ▾

Pending Approvals 0

INSIGHT ▾

TEAM ACTIONS

- Assign Learning
- Assign Skills
- Assign Checklist

Assign Learning to One Learner

1. Navigate to *My Team* (top navy blue ribbon)
2. Click the person's name from the list
3. Click *Assign learning* under **Actions** drop down menu
4. Click *Add to Plan* (assign course and allow learner to select date of session). Note: Register will assign a specific session date to the user and the user cannot change the date if there are conflicts.)
5. Click the **Next** bottom on bottom right
6. Enter course name in **Search catalog** field and click the magnify glass
7. Click *Select date* under **Due date** column (when adding to plan)
8. Click *Yes* under **Mandatory** column
9. Click the right arrow under **Action** column
10. Click *Add to Plan* button
11. Confirmation will display and an email is sent to the learner
12. Click the *Close* button

Assign Course to Multiple Learners

1. Navigate to *My Team* (top navy blue ribbon)
2. Click *Assign learning* under **Team Actions** (top right)
3. Click *Add to Plan* (assign course and allow learner to select date of session). Note: Register will assign a specific session date to the user and the user cannot change the date if there are conflicts.)
4. Enter course name or course number in **Search catalog** field and click the magnify glass
5. Click *Select date* under **Due date** column (when adding to plan).
6. Click + icon
7. Enter learner's name in **Person Search** field and click the magnify glass – or – scroll down to view full list
8. Click *Yes* under **Mandatory** column for learners being assigned
9. Click + icon
10. Click *Add to Plan* button
11. Confirmation will display and an email is sent to the learner
12. Click the *Close* button

Run Ad-Hoc Reports



1. Navigate to My Team > Analytics
2. Click on the name of the report: **UConn 'My Team' Enrollment Report**
3. Enter specific criteria (e.g. Course name).
4. View report on screen or click *Download* in upper right (follow prompts to complete download).
5. Click x in upper right of reports window to close report.

Help Contact

Additional information is available at: <http://hr.uconn.edu/learningatwork/>

For assistance, contact the Learning@Work admin at learningatwork@uconn.edu