Purpose: This document explains how managers can perform the following actions for their direct reports from the Knowledge Link My Team tab:

- View Learning Plans
- Run Learning Reports
- Assign Learning
- Register/Enroll Employees (Multiple and Individual)
- Withdraw Employees (Multiple and Individual)

View individual learning plans.

1. From your KL home page, select the My Team tab.

To view individual employee Learning Plans, click a name on the left to view that employee’s Learning Plan in the center of the screen.

To view a list of employee required training soon due or overdue, click Dashboard.

2. When the Dashboard displays:
   a. Select Learning from the Show drop-down box
   b. Select Next 30 Days from the Due Date drop-down box

The dashboard lists your employees’ names, required learning items, and their due dates. To send an email to an employee, click the email icon next to his/her name.
Run Learning Reports.

1. From your KL home page, select the My Team tab.
2. Under Supervisor Links, click Learning Reports.

3. On the Reports screen, select the report you wish to run.
   - Learning History (item completions)
   - Learning Hours (item completions with credit and contact hours)
   - Learning Plan (assigned learning – required and optional)
   - User Information (user learning history along with user data from Lawson)

You can choose an HTML version or a CSV (Excel spreadsheet) version of the report.
5. Select the report criteria and run the report.

User criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self</td>
<td>The manager running the report</td>
</tr>
<tr>
<td>Direct Subordinates</td>
<td>All direct reports</td>
</tr>
<tr>
<td>All Subordinates</td>
<td>All direct reports and their direct reports and so on (cascades all the way down the reporting hierarchy)</td>
</tr>
<tr>
<td>All</td>
<td>All subordinates plus the manager running the report</td>
</tr>
</tbody>
</table>

**Assign Learning.**

Managers can assign learning to direct reports.

1. From your KL home page, select the **My Team tab**.
2. Under Supervisor Links, click **Assign/Remove Learning**.
3. On the Manage Learning Activities screen, select **Add Items and Curricula**.
4. Click **Next**.

**Note:** You can also remove assigned items from an individual’s learning plan. However, you can only remove learning that was assigned by you or self-assigned by the individual. To remove assignments created by system administrators, you must contact the IS Service Desk at 215-662-7474.

5. Select the users to whom you wish to assign learning.
6. Click **Add Checked**.
7. Click **Next**.

8. Uncheck the **Exact Phrase** box.
9. Type in a key word in the title of the item you wish to assign.
10. Select the assignment type if known.
11. Click **Search**.
12. Select the item(s) you wish to assign.
13. Click **Add Checked**.

14. Repeat your search to add more items.
15. Click **Next**.

16. Click **Finish**.
Register/Enroll Multiple Employees.

NOTE: For simpler steps for enrolling individual employees (one at a time), see Page 10.

Managers can register employees into specific classes. Please note, if a manager registers the employee, the employee cannot withdraw from the course and may not be able to enroll in an alternate class. The manager must withdraw the employee from the class.

1. From your KL home page, select the My Team tab.
2. Under Supervisor Links, click Register/Withdraw Employees.

3. Click Register Users then click Next.
   *NOTE: If you want to withdraw a user, click “Withdraw Users” instead.*

4. Type the name of the course and click Next. The name of the course should be typed exactly as it appears in Knowledge Link.
5. Select the offering that the employee will be enrolled in and then click **Next**.
   
   **NOTE:** there may be multiple pages of offerings. If withdrawing an employee, you must select the specific class that the employee is enrolled in.

6. Select the employee(s) that should be enrolled (or withdrawn) and click **Next**.

7. Click **Next**. (Comments are optional.)
   
   **NOTE:** If employees were added by mistake, check the “Remove” box and click **Remove Checked**.

8. Click **Next**.
9. Click Finish.

10. The enrollment(s) will be processed.

**Withdraw Multiple Employees.**

1. From your KL home page, select the My Team tab.
2. Under Supervisor Links, click Register/Withdraw Employees.
3. Click **Withdraw Users** then click **Next**.

4. Type the name of the course and click **Next**. *The name of the course should be typed exactly as it appears in Knowledge Link.*

5. Select the offering that the employee will be withdrawn from and then click **Next**. *NOTE: there may be multiple pages of offerings.*

6. Select the employee(s) that should be withdrawn and click **Next**.
7. Click **Finish**.

8. The employee(s) will be withdrawn.

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Register/Enroll Individual Employees.

1. From your KL home page, select the **My Team tab**.
2. Click the name of the employee to enroll.
3. In the employee learning plan, click **Register Now** for the course you wish to enroll them in.
4. Choose the date and click **Register Now**.
5. Click Confirm.

6. The employee is enrolled. Click the “X” to close the window.

**Withdraw Individual Employees.**

1. From your KL home page, select the **My Team tab**.
2. Click the name of the employee to withdraw.
3. In the employee learning plan, click the arrow button then click Withdraw.
4. Click Yes.

5. Click No. (This will keep the associated item on the employee’s learning plan.)

6. The employee is withdrawn. Click the “X” to close the window.