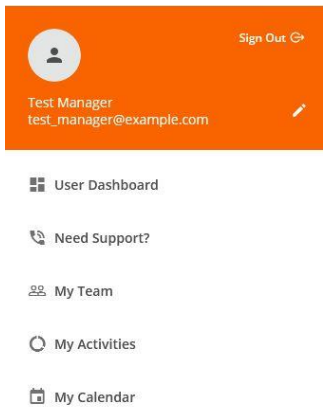
Compliance Learning Manager

User Guide – My Team

My Team

A manager can be given visibility of their direct reports in Compliance Learning Manager (CLMS), allowing them to review how members of their team are progressing on training and act accordingly.



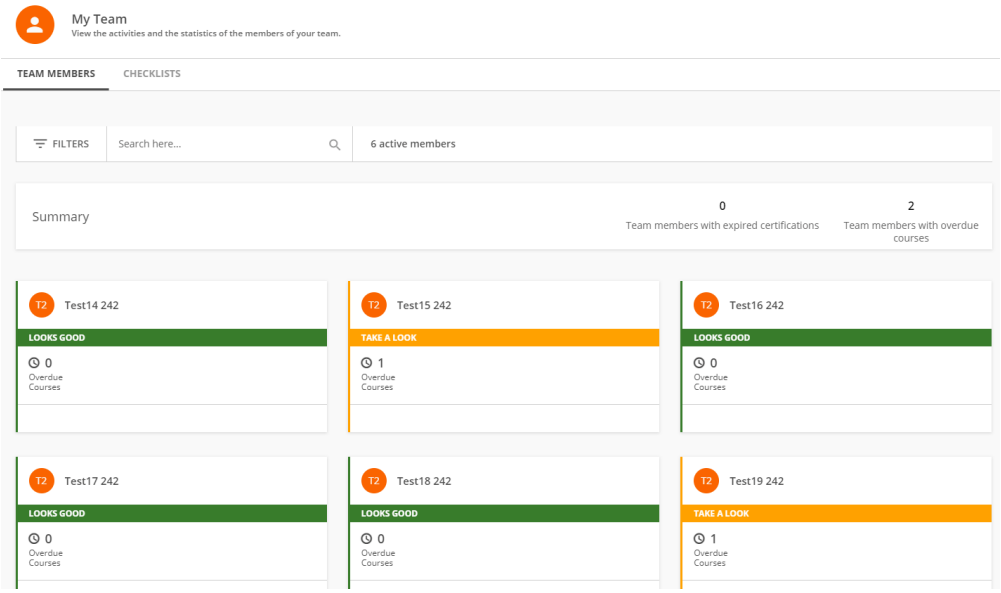
When enabled, the "My Team" page is available on the left-hand menu and is only visible to managers with direct reports. If someone is not a manager this page will not appear.

The page acts as a dashboard where the manager can see the status of their teams training and if any staff have overdue courses.

Managers will be able to see their direct reports and also drill down into their team members reports. NOTE: This is standard functionality and cannot be changed.

Notifications can be set-up and will be sent to a manager if a member of their team has outstanding training.

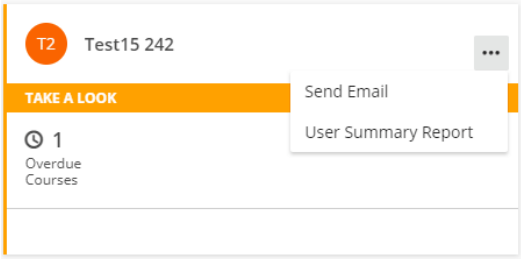
This image below shows the view that managers have when they navigate into their "My Team" page. For a user's card to appear they must be active. The summary section at the top allows managers to quickly and easily see how many team members have overdue courses.



A card will appear green as long as the user has no overdue courses. The user could have 10 incomplete courses, but if the deadline has not passed it will display as green.

A card will appear orange if the user has one or more overdue courses.

Each user's card offers further functionality by clicking on the 3 dots icon in the top right of the card.



Send Email: opens up a panel to email this individual. There is no option to select multiple people and send a mass email.

User Summary Report: this will bring up the user summary

Overdue courses: this will jump directly to the "Courses" page of the user personal summary.

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How to set up

This feature is automatically enabled when the relevant relationship between managers and direct reports has been configured. The following criteria need to be met:

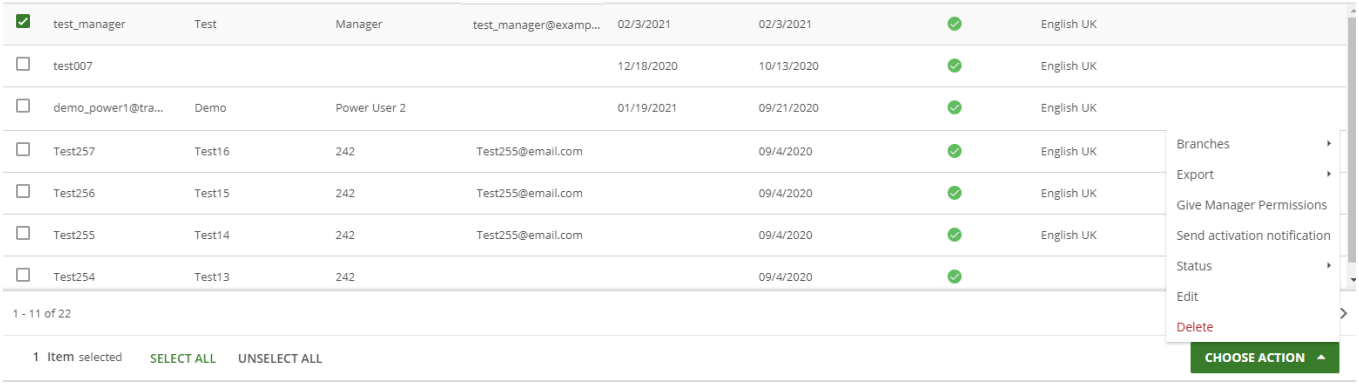
- The user must be set as a manager
- They must have at least one direct report

NOTE: If all of the managers direct reports are deactivated, the page will still appear but will be blank.

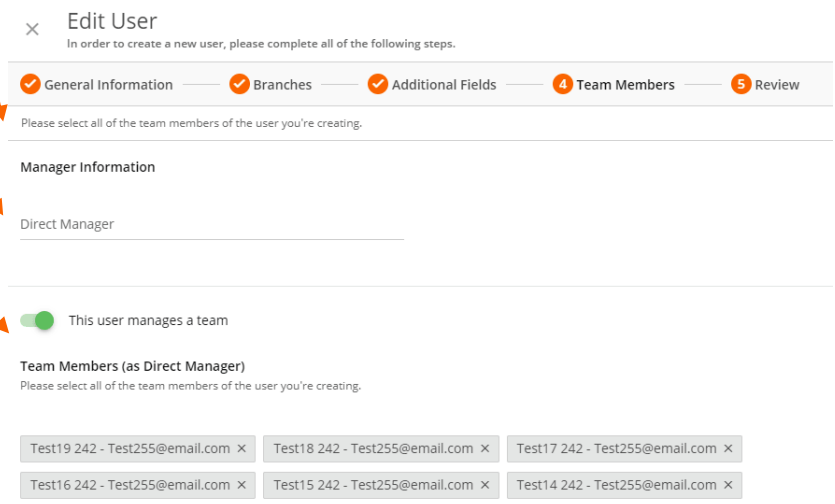
You can either update users in CLMS interface or through a bulk upload.

To update in CLMS interface

1. Select a user > CHOOSE ACTION > Give Manager Permissions



2. Set manager permissions and direct report relationships by: Ellipsis icon > Edit > Team Members tab
3. set the user's direct manager toggle on to give manager permissions
4. set this user's direct reports



To update using bulk upload tool

To add managers to the system or update existing accounts to enable this feature a .csv file needs to be created with the following data.

Column A: the username of users

Column B: identify the managers by entering "1" (the system will also accept Yes)

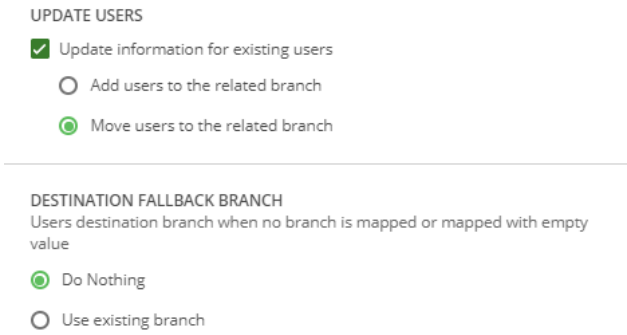
Column C: the username of this individual's direct manager

NOTE: The order doesn't matter (i.e. the managers don't have to be at the top of the file).

1	Username	Is a manager	Direct Manager
2	User 1@yourcompany.com	1	Manager 1@yourcompany.com
3	User 2@yourcompany.com	0	Manager 1@yourcompany.com
4	User 3@yourcompany.com	1	Manager 2@yourcompany.com
5	User 9@yourcompany.com	0	Manager 2@yourcompany.com
6	User 10@yourcompany.com	0	Manager 1@yourcompany.com
7	Manager 1@yourcompany.com	1	Manager 1@yourcompany.com
8	User 12@yourcompany.com		Manager 3@yourcompany.com
9	User 13@yourcompany.com		Manager 3@yourcompany.com
10	Manager 2@yourcompany.com	1	Manager 2@yourcompany.com
11	User 15@yourcompany.com		Manager 2@yourcompany.com
12	User 16@yourcompany.com		Manager 2@yourcompany.com
13	Manager 3@yourcompany.com	1	Manager 2@yourcompany.com

To carry out the update and upload the new information:

1. Select to Update information for existing users. As users are not be moved select "Do Nothing" on the Destination fallback.
2. These are the two fields you will be updating:
   Is a manager = 1 (column B)
   Direct manager = username of their manager (column C)



Username	User 1@yourcompany.com	User 2@yourcompany.com	User 3@yourcompany.com	+14
Is a Manager	0	0	0	+14
Direct Manager	Manager 1@yourcompan...	Manager 1@yourcompan...	Manager 2@yourcompan...	+14

Downloading manager details

To view the current manager-direct reports relationship on CLMS:

1. Select users > CHOOSE ACTION > Export > Export as CSV/XLS
2. Select the fields you would like in the report. Ensure you include the fields:
   - Username
   - Manager Permissions
   - Direct Manager
3. The system will provide you with a download. NOTE: the manager field will read "Yes" or "No"