# YU Learn for Managers & People Partners


This guide outlines the key features in YU Learn for managers with direct reports, including special notes for Human Resource People Partners and others with an HR role. It assumes that you are already familiar with using YU Learn as an employee, including locating and registering for learning opportunities.

## Contents



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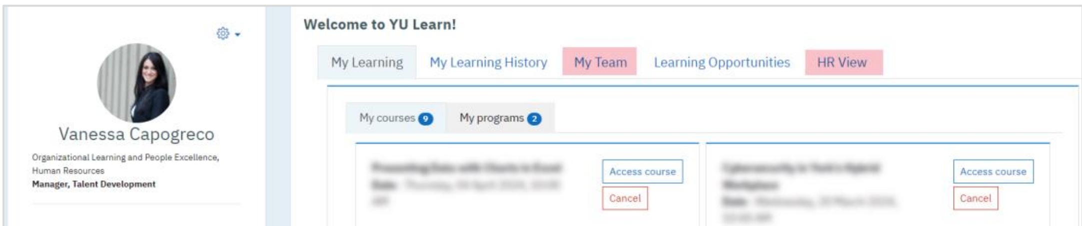
# Your Dashboard

On the YU Learn dashboard, managers with direct reports will find the **My Teams** tab listing their direct reports. People Partners and others with an HR role will find an **HR View** tab to access similar features for their entire organization. This information comes from PeopleSoft.

If your team views are inaccurate or you don't see the My Team tab, report it to [hrhelp@yorku.ca](mailto:hrhelp@yorku.ca) as a PeopleSoft issue.




## Casual Employees

You won't see your casual employees under My Teams unless they have a "reports-to" property in PeopleSoft. As long as they have a Passport York account and an active job, all casual employees do have access to YU Learn but you will not receive notices about their activity. Please coordinate with these employees directly.

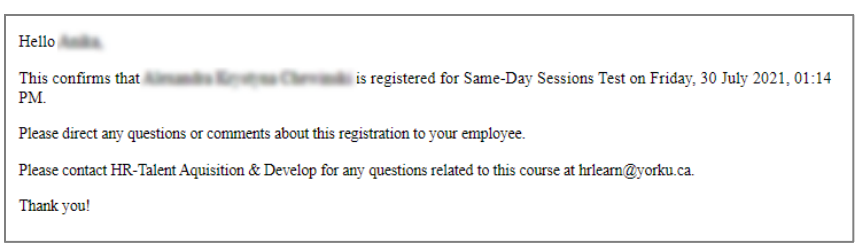
# Automated Notifications

As your employees engage with YU learn, you will receive email notifications when they register to attend a scheduled course, join a program, or cancel registration.

**Assumption of Approval:** YU Learn presumes that course registration was **pre-approved in principle** by the manager during routine conversations about learning with the employee.

When an employee self-registers, YU Learn reserves a seat immediately and sends a notification to the manager. If you don't wish to grant approval, please speak to your employee and arrange for their registration to be cancelled. If there is a waiting list, YU Learn will automatically enrol the next person in line.

This assumption of approval ensures that employees won't lose a seat in a popular course or program if their manager cannot respond to email promptly.


Hello

This confirms that is registered for Same-Day Sessions Test on Friday, 30 July 2021, 01:14 PM.

Please direct any questions or comments about this registration to your employee.

Please contact HR-Talent Aquisition & Develop for any questions related to this course at hrlearn@yorku.ca.

Thank you!

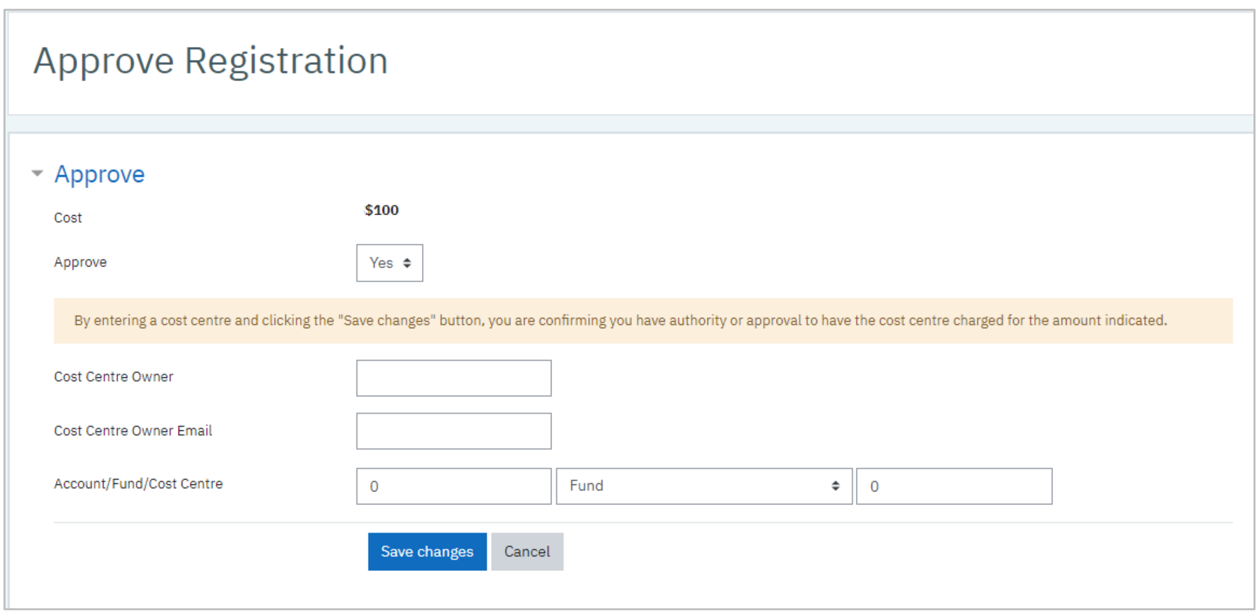
## Courses and Programs Requiring Pre-Approval

Some courses require pre-approval before registration is confirmed, such as the Standard First Aid course where a registration fee is charged back to the department.

- As manager, you will receive an email with a link to an approval page where you will select Yes or No, and enter a cost centre to be charged, if applicable.
- If you can't fill in the approval form right away, click Cancel but keep the notification email at hand. You can go back to complete the approval later.
- Once you approve the request, a seat is reserved for your employee. Both you and your employee will receive registration confirmation emails.
- If you do not approve the registration, the employee will be notified via email, and you will receive a registration cancellation email.
- If there is a waitlist, your cost centre will be charged only if your employee gets a seat.

**YU Learn does not directly charge your budget.** It collects your cost centre information for the learning provider, who prepares a journal entry following standard York budget processes.

If you make a mistake in the cost centre or need to follow up about budget charges in any way, please contact the learning provider.

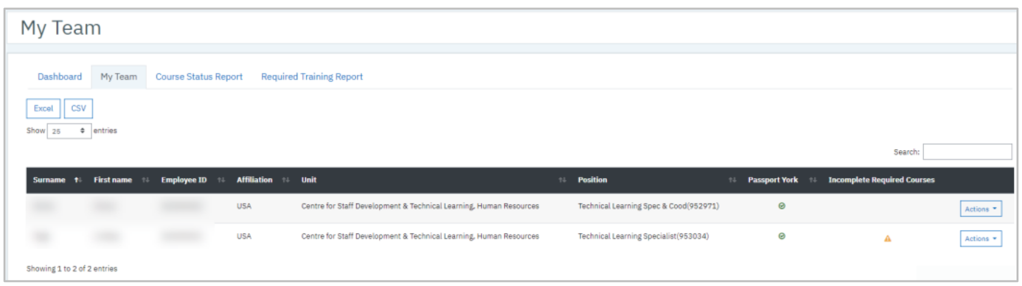


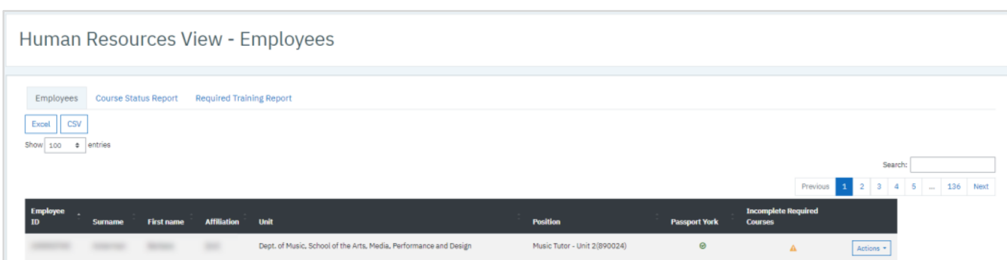
# Locate an Employee

1. From your Dashboard, click **My Team** or **HR View**
2. If needed, type a name into the Search field to narrow down the results


From here you can:

- **Search** for any data on the form to narrow down the list to a unit or employee
- **Sort** the list by clicking on any column
- Change how many entries are displayed per page
- **Export** the visible records to Excel for filtering and analysis
- Use the Actions button button Actions to view an employee's individual learning history, or assign learning to them
- **Access course reports** from the tabs above the employee list




In the employee list, watch for these alerts:

**Caution Icon** ⚠ The employee is behind on one or more required training courses. To view the employee's required courses, click on the icon or click the Actions button and select View Learning History.

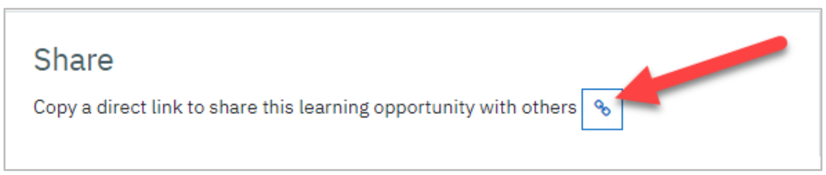
**Passport York inactive** The employee doesn't have a Passport York account. They cannot log into YU Learn, and will not receive automatic notifications if you enrol them into courses.

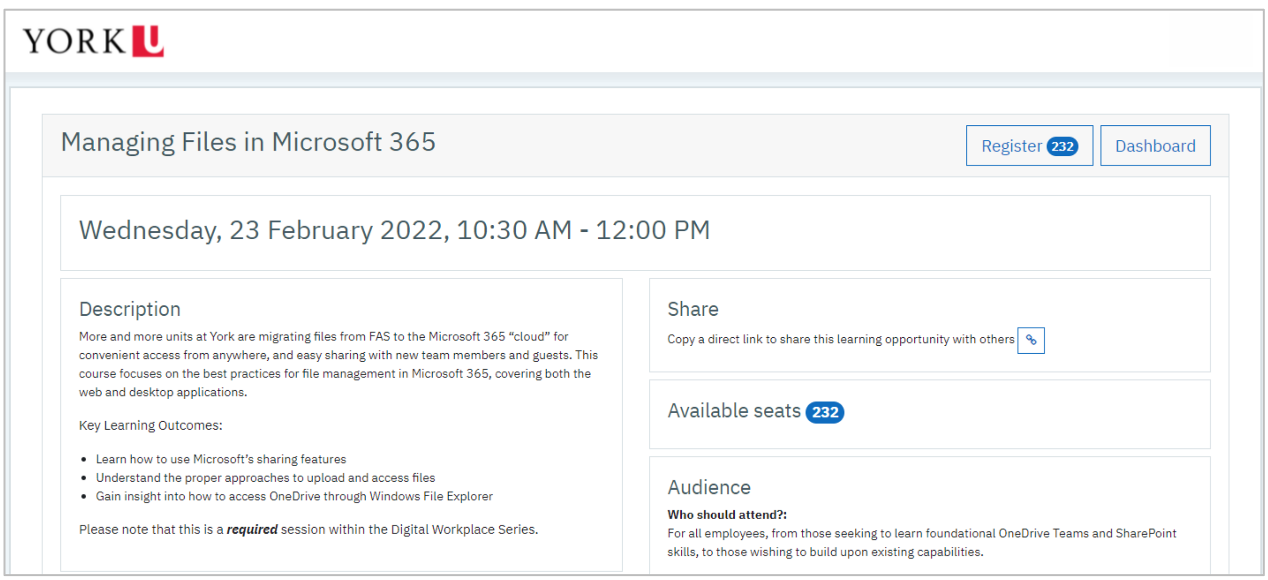
# Recommend Learning Opportunities

You can use a sharing link to recommend any YU Learn opportunity to your team, including instructor-led courses, e-learning courses, non-credit learning packages, and programs. The sharing link leads to a self-registration page where your employee can register themselves.

1. Locate the learning opportunity
2. Open the course description and click the Share icon to copy the link—*do not copy the link from the address bar in your web browser, as it may be specific to you!*
3. Share the link via an email or post it on a web page

People who follow the link must log in with Passport York, but then they'll see the description and a Register button without having to search for the course.



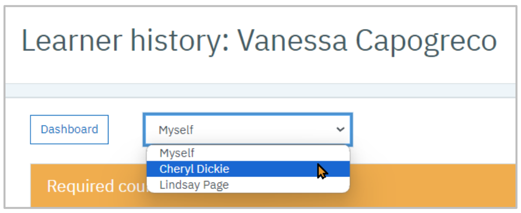



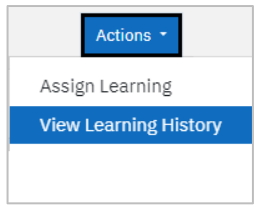
# View an Employee's Learning History

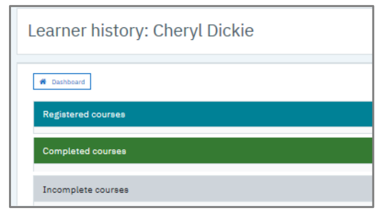
If you are a manager:

1. Open your own My Learning History page
2. Click the drop-down menu next to the Dashboard button and select an employee

If you are a People Partner, click on the HR View tab, search for the employee, click their Actions button and select View Learning History.



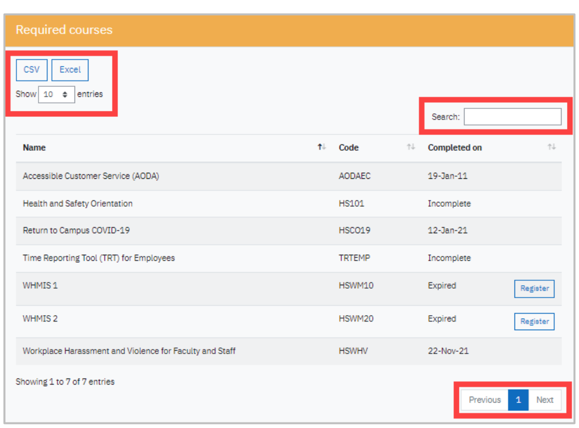




The employee's Learner History page appears, with sections for courses that are:

- **Required:** Courses required for compliance with legislation or University policies, identified based on the employee's affiliation (e.g., YUSA or CPM) or role (manager with direct reports). If a required course is incomplete or expired, a Register button will appear—you can use this to register the employee, if you wish. If the employee already registered but hasn't completed the course, there will be no Register button.
- **Registered:** Employee registered but hasn't attended/completed yet
- **Completed:** Courses the employee completed successfully
- **Incomplete:** Registered but not yet complete. Courses listed here could be ones where the learning provider hasn't marked attendance yet, or ones where the employee was marked as Absent or Incomplete.

The Dashboard button at the top of the page returns you to your own Dashboard.

Within each section you can browse through pages, change the number of courses visible per page, search for a course, or export the data.




| Name | Code | Completed on | |
|---|---|---|---|
| Accessible Customer Service (AODA) | AODAEC | 19-Jan-11 | |
| Health and Safety Orientation | HS101 | Incomplete | |
| Return to Campus COVID-19 | HSCO19 | 12-Jan-21 | |
| Time Reporting Tool (TRT) for Employees | TRTEMP | Incomplete | |
| WHMIS 1 | HSWM10 | Expired | Register |
| WHMIS 2 | HSWM20 | Expired | Register |
| Workplace Harassment and Violence for Faculty and Staff | HSWHV | 22-Nov-21 | |

# Assign Learning to an Employee

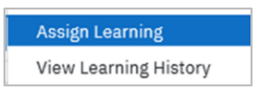
You can **directly register** employees who report to you into learning opportunities including instructor-led courses, eLearning courses, learning packages, and programs. Please ensure your team is aware that you plan to register them—don't let a notification email be the first they hear about it!

For **standard required learning courses** such as WHMIS or TRT, open the employee's learning history page, click Register in the Required courses section, then click Register on the course description page.

To register an employee into any other learning opportunities:

1. Locate the employee in your My Team or HR View
2. Click their **Actions** button 

and select **Assign Learning**




You'll see a Learning Opportunities page with your team member's name instead of your own. Any actions you take while here are *on behalf of* the employee. Any rules such as audience restrictions apply to your employee, not you.


3. Locate the learning opportunity
4. Click **Register**

The employee will receive a notification stating that you registered them into the course or program, with advice to speak directly to you if they have any questions.

An employee that you register into a course can cancel the registration on their own behalf if they are unable to attend. If they are unable to cancel for themselves, you can use Actions > Assign Learning to locate the course and cancel on their behalf.

# Required Training Report

Use this report to monitor your team's compliance with standard legislated or University-mandated training such as the WHMIS or Time Reporting Tool (TRT) courses. If a required training course can be identified based on the employee's affiliation (e.g., YUSA or CPM) or role (manager with direct reports), the course and the employee's status on it will be listed here.

This report **does not include job-specific training**. If your employees require additional courses such as Ladder Safety or Laser Safety, use the **Course Status Report** to monitor their completion status.

You can also monitor required training from your My Team or HR View. Look for a caution symbol ⚠️ in your employee list and click on it to view the employee's required courses. One or more courses will be incomplete or expired.

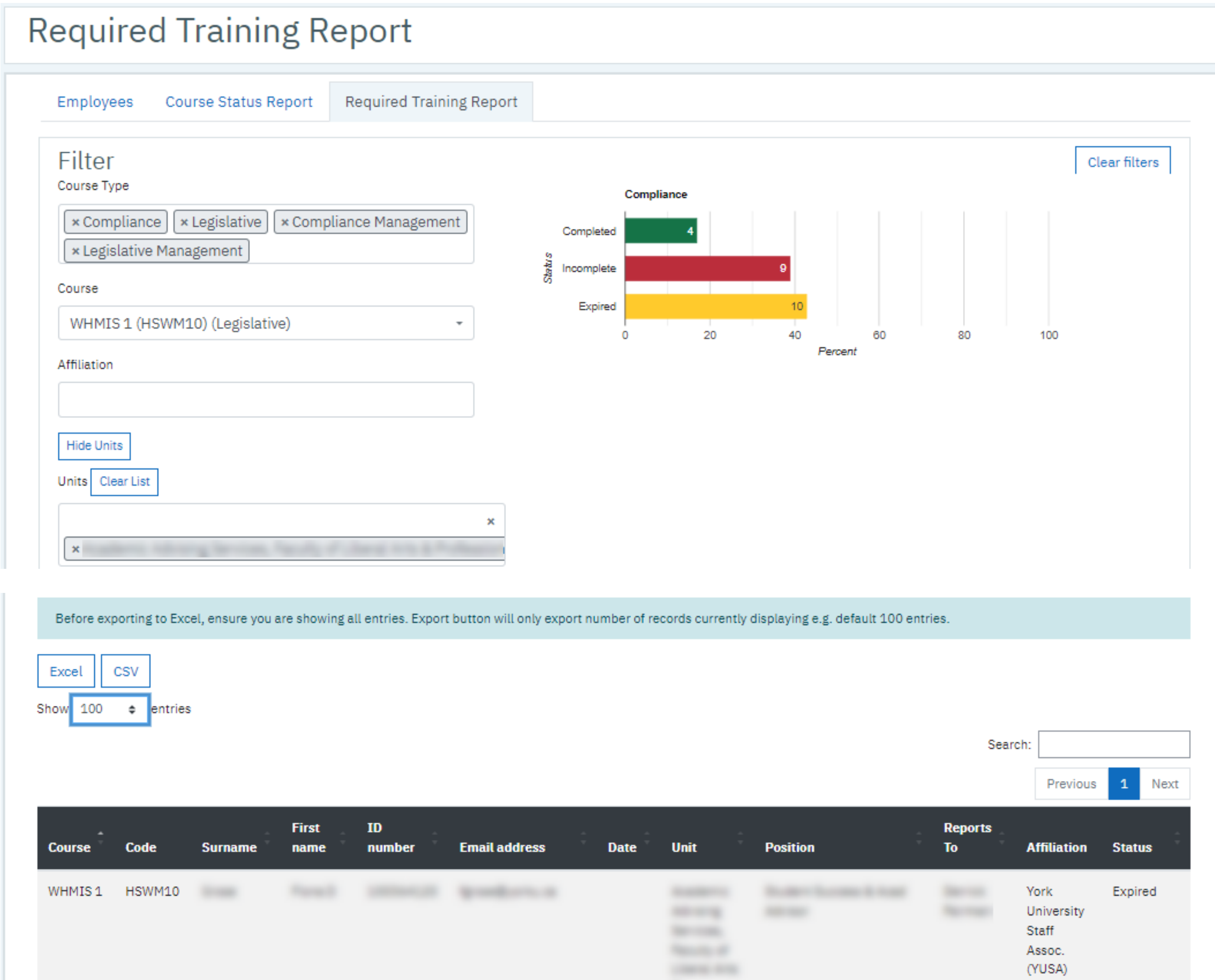
To get the Required Training Report:

1. Go to **My Team** (or HR View)
2. Click on the **Required Training Report** tab. The report is blank initially.
3. Chose **filter settings**—you must choose at least the course title. The other filters are optional and explained below.
4. Click **Apply** (the Apply button only appears after you have chosen a course)

## Filter Options

Only the course title is required to generate a Required Training report, but by default the report will include all your employees, even if you're responsible for multiple units. You can further refine the report with these Filter options.

- **Course type:** All course types used for legislated / University-mandated courses are included by default—if needed, click on any one to eliminate it.
- **Course:** Only courses that fall under the types chosen above will be available to select from the drop-down list.
- **Affiliation:** optionally, choose an affiliation such as YUSA to narrow down the results.
- **Show Units (HR only):** Click to select only specific units within your area. By default employees from all units are shown.
- **Clear Filters:** Appears only after generating results. Click to reset the form and start over.




To export the entire report to Excel for further analysis, adjust the **Show** drop-down menu so that all records are on display on one page, then click **Excel** or **CSV** to download the data.

| Status | Meaning |
|---|---|
| **Completed** | Employee completed this course as required. |
| **Incomplete** | Employee has never completed this course.<br>“Incomplete” might also mean that an employee hasn’t completed **the current version** of the course under its current course code. For legislated / mandated training, the course code can change when all employees must re-take the training. |
| **Expired** | Employee completed the course in the past, but it has expired and requires renewal. |

# Course Status Report

Use this report to list your entire team's history on all courses in YU Learn. This report is useful for monitoring job-specific training that YU Learn cannot automatically assign.

If an employee does not appear on this report for a given course, it means they have never completed it and are not currently registered for it.

To get a Course Status Report:

1. Click the My Team (or HR View) tab
2. Click on the **Course Status Report** button (or tab)

By default, the report displays all courses for all your employees.

3. **Search** by any data on the form to narrow down the list to a single course, unit, or employee

You can also:

- Sort the list by clicking on any column
- Change how many entries appear per page
- Export the visible records to Excel for filtering and analysis

CSV Excel

Show 25 entries

Search:

| Course | Code | Employee ID | Surname | First name | Affiliation | Unit | Position | Completed on | Status |
|---|---|---|---|---|---|---|---|---|---|
| (LDS5) Finance Essentials | LD5FIN | [illegible] | [illegible] | [illegible] | CPM | DFA-Office of the VPFA | Program Dir, Sustainability(950672) | 27-Jul-01 | Completed |
| (LDS5) Finance Essentials | LD5FIN | [illegible] | [illegible] | [illegible] | USA | UIT-Project Management Office | Project Manager(952302) | 27-Jul-01 | Completed |
| (LDS5) Finance Essentials | LD5FIN | [illegible] | [illegible] | [illegible] | USA | LAPS - Human | Administrative Coordinator(951530) | 27-Jul-01 | Completed |