Manager Guide

Overview

Who is assigned as a manager in Eureka?

The 'Manager' role is automatically assigned to individuals who have employees that report to them. This employee data is refreshed nightly from CAPS.

What can managers do within Eureka?

Managers are granted the following permissions:

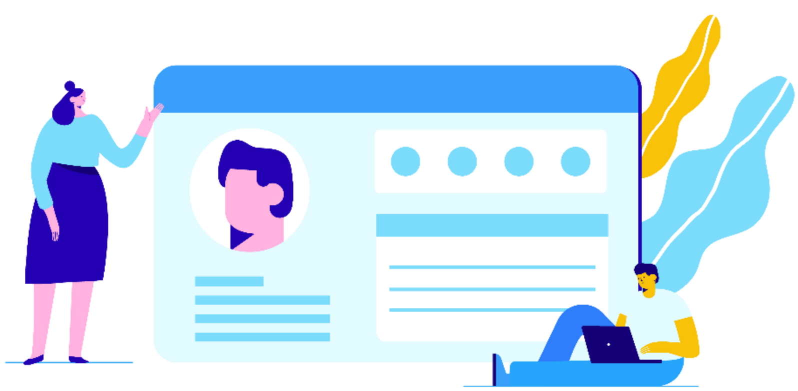
- Access to view team member details and transcripts
- Access to manage training requests
- Access to generate and export reports based on their employees

The following sections provide step-by-step instructions to use the manager permissions.

View Team

As a manager, you are able to view information about the individual(s) who report to you as well as the individual you report to in the organization. To access the 'My Team' view, follow these steps:

1. From the icon, expand the **Home** tab
2. Select **Universal Profile & My Team**
3. Scroll down to the **My Team** section of the page



Manage Employee Learning

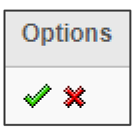
From the Manage Employee Learning page, you can access to manage pending requests and access to view transcripts. To open this page, follow these steps:

1. From the icon, expand the **Learning** tab
2. Select **Manage Employee Learning**

Manage employee training requests

From the Manage Pending Requests page, you can view training requests you must approve or deny. To manage pending requests:

1. From the **Manage Employee Learning** page, select **Manage Pending Request** at the top
2. On the **View Pending Requests**, under the **Training Pending Approval** section, you will see the following training requests details: requested by, training title, type of training, request submission date, and purpose of request. You will also see an option to approve or deny the request under the **Options** column on the far right:



3. Click to approve or click to deny the training request
4. Before you submit your decision on the next page, you will be promoted to enter any additional comments and identify the percentage the employee will be required to pay by credit card.
5. Click Submit to submit your decision

View employee transcripts

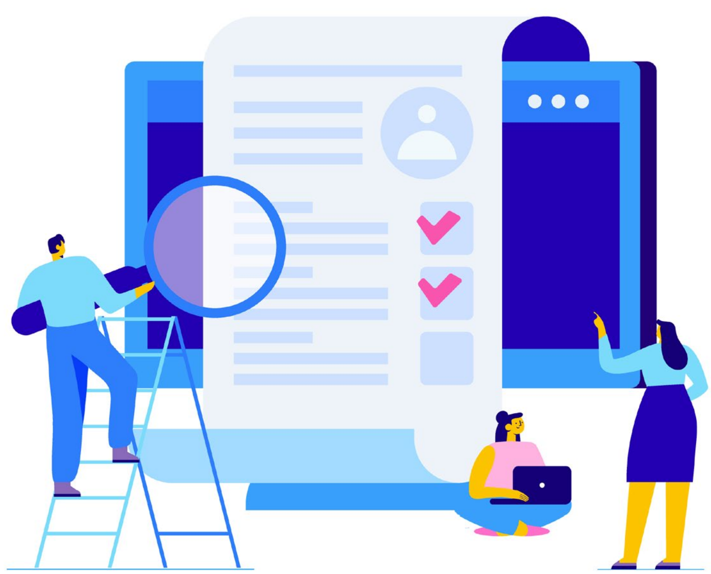
From the Manage Employee Learning page, you can stay up-to-date with your employees' training by accessing their transcripts. To view their transcripts:

1. From the **Manage Employee Learning** page, you will see a list of your subordinates
2. Locate the employee whose transcript you would like to view from your list
3. From the **View Transcript** column on the far right, click the icon next to the employee's name

Manage Employee Exemptions

As a manager, you have the ability to exempt your employees from certain training they send you an exempt request for in Eureka. To access this permission, follow these steps:

1. From the ☰ icon, expand the **Learning** tab
2. Select **Exemption Tracking**
3. On the **Exemption Requests** page, select the **Active** tab
4. Locate the individual whose request you would like to respond to
5. Click **Respond** under the **Options** column on the far right of the page
6. From the **Response** dropdown, select 'Approve' or 'Deny'
7. From the **Indicate Reason** dropdown, select the reason for your decision
8. In the **Comments** section, add any comments related to your decision



View Team Reports

As a manager, you are able to generate and export standard reports associated with your employee(s). To access these reports, follow these steps:

1. From the icon, expand the **Reports** tab
2. Select Standard Reports
3. From the Track Employees section, you will see the following report options:
    - **No Show Details**
        - Displays sessions where one or more employees did not attend the required number of parts
    - **Past Due**
        - Displays employees who are past due for training
    - **Past Requests**
        - Displays training requests you have already approved, deferred, or denied. You may also change your decision for training that your employee has not already registered for.
    - **Pending Requests**
        - Displays outstanding training requests you must approve, defer, or deny.
    - **Records**
        - Displays user data and transcripts for individual employees
    - **Session Withdrawal**
        - Displays a list of employees who registered for sessions and later withdrew their registration, including reasons for withdrawal
    - **Training Progress Pie Chart**
        - Displays a pie cart summary of subordinates' training progress
    - **Training Status Summary**
        - Displays a summary of how many training items each employee has that are not started, in progress, or completed
    - **Transcripts**
        - Displays transcripts for employees for whom you are the approver, manager, or cost center approver
4. Depending on the report you selected, you may have the options to adjust report criteria by user, date, event, facility, provider, type, or other options. Adjust your criteria as needed.
5. Depending on the report you selected, the data may be visible from the report page immediately. In some cases, you will need to click Printable Version or Export to Excel to view data. And in other cases, you will need to click Process Report before you are able to generate or export the data.

Assign Employee Training

As a manager, you are able to assign training to your employees. Once the training has been assigned, your employee will see it in their transcript. To assign training, follow these steps:

1. From the icon, expand the **Learning** tab
2. Select **Learner Home**
3. Locate the desired training in the Learner Home page or use the search bar
4. Once you have located the desire training, click the icon below the desired training's title
5. Select **Assign** from the dropdown
6. On the next page, click the icon to select a due date
7. Add a comment (optional)
8. Check the box below the comment box to automatically register your employees. (This skips the step that requires your employee to register for the training before accessing it.)
9. Check the box next to the desired employee(s)
10. Click Submit to assign the desired training to the desired employee(s)