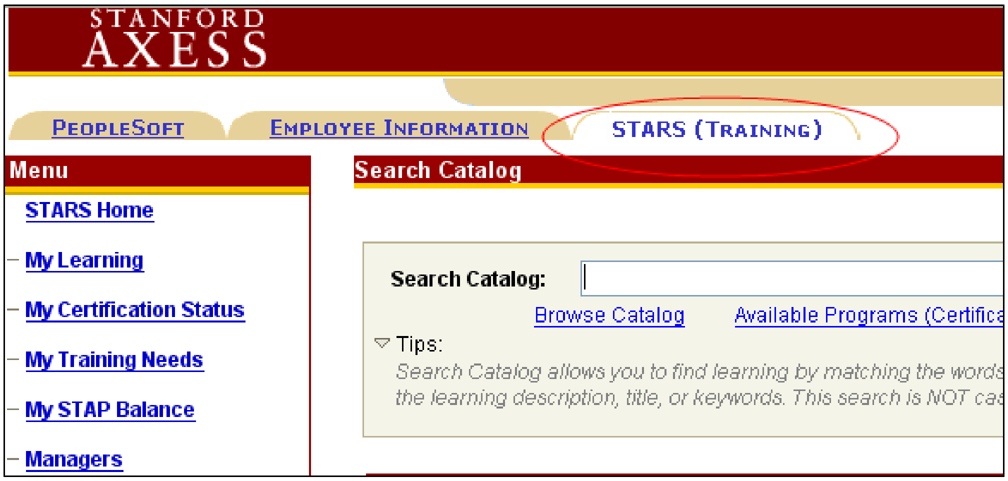
Job Aid: Manager Self-Service in STARS

The Manager Self-Service feature in STARS enables managers to view the Learning Histories of their direct reports (and those in the organizational hierarchy below their direct reports) in STARS. Managers can also view employees' Certification Status and add courses/programs as "planned" activities to employees' My Learning pages.

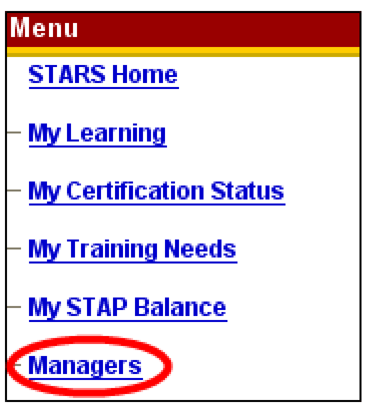
Access Manager Self-Service

Manager Self-Service is available via the **STARS (Training)** tab within the Axess portal. To access it:

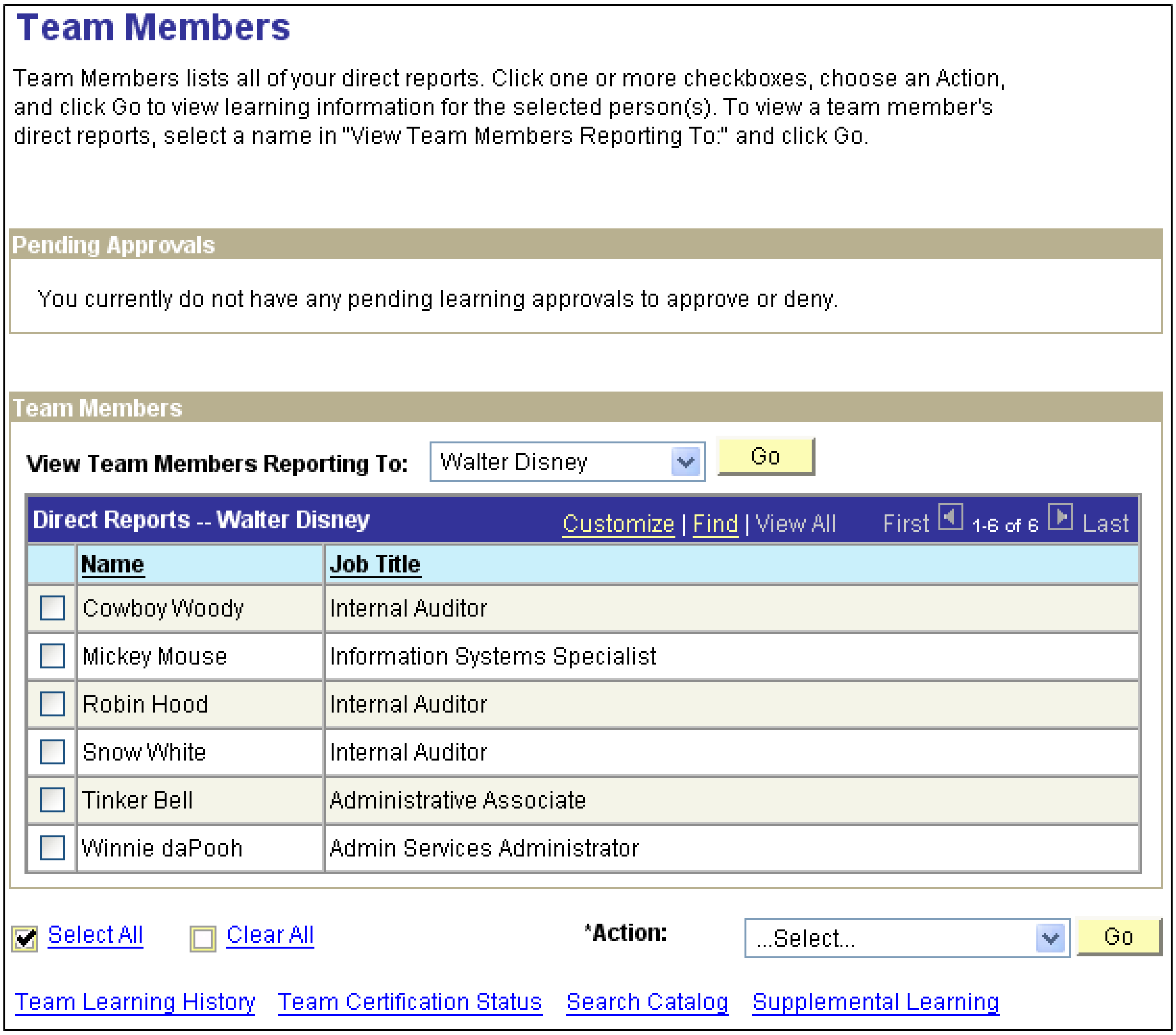
1. Point your web browser to http://axess.stanford.edu.
2. Login with your SUNet ID and password.
3. Click on the **STARS (Training)** tab.



4. Click on the **Managers** link in the main menu on the left. This link is only available to individuals with staff reporting directly to them.

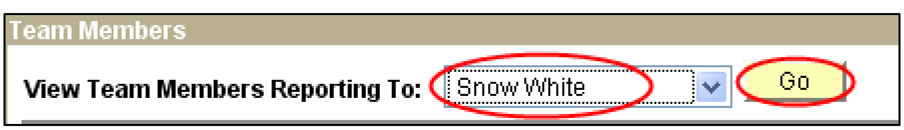


The resulting page displays the list of your direct reports and provides options for various actions related to your team's learning activities.

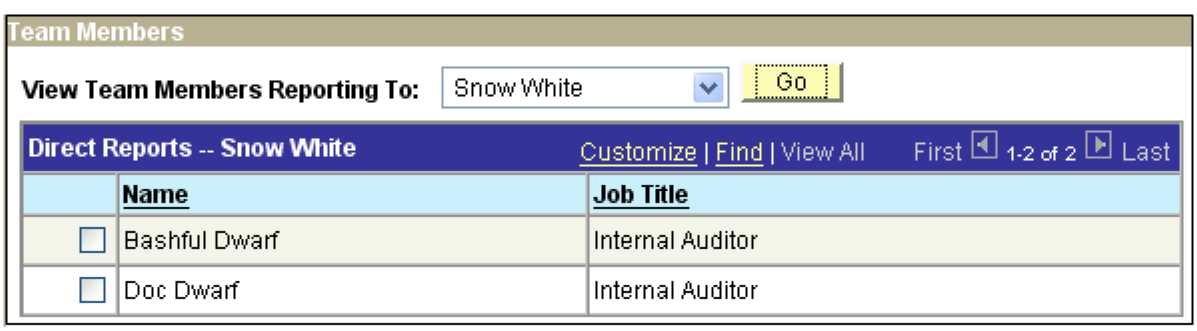


Drill Down through Your Team Hierarchy

You may view the list of team members who report to one of your direct reports by choosing a name from the "View Team Members Reporting To:" dropdown list and clicking the **Go** button:



The resulting page displays the selected employee's direct reports:



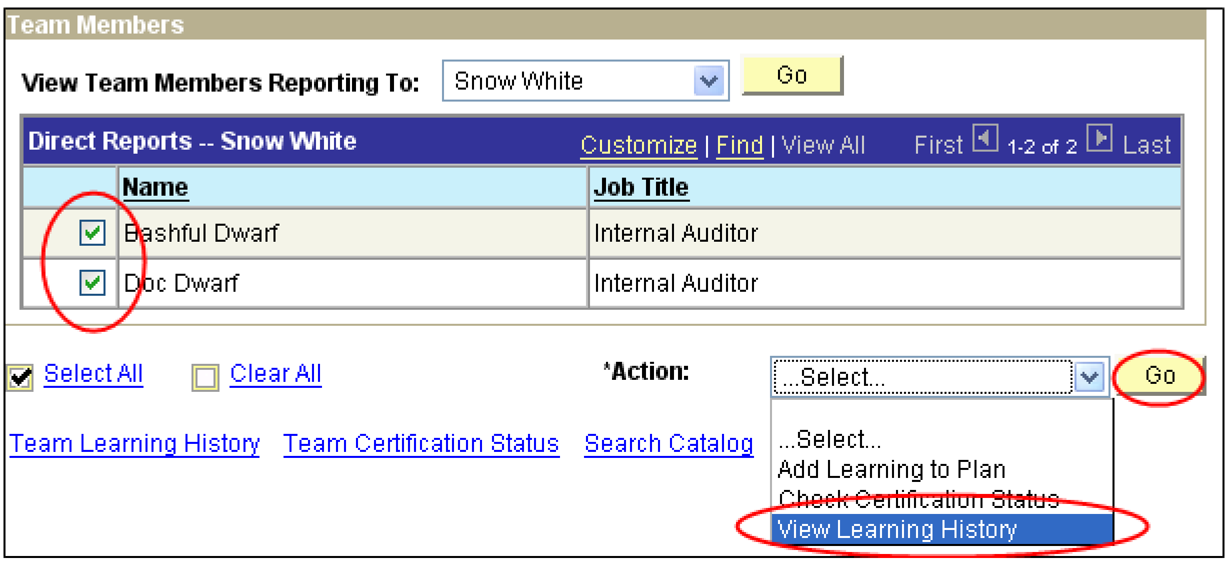
You may drill down in this way all the way to the bottom of your team's hierarchy.

View Team Members' Learning Histories:

1. Click the checkbox beside one or more team members' name(s).

2. Choose "View Learning History" from the Action dropdown menu.

3. Click the **Go** button.
   *Note that you may click the **Team Learning History** link on the lower left without having to click all the checkboxes to see the complete learning history for the entire team.



The resulting page displays the Learning Histories for all selected team members:

Team Member Learning

For: Bashful Dwarf | Go

View All | First 1-10 of 65 Last

Name	Title	Type	Status	Status Date
Bashful Dwarf	Property Reports in ReportMart3	Classroom (hands-on)	Enrolled	09/23/08
Doc Dwarf	Moving from Sundial to Stanford Calendar	Classroom	Enrolled	06/30/09
Doc Dwarf	Effective Communication to Build Work Relationships	Classroom	Enrolled	07/02/09
Doc Dwarf	Success at Work Through Clarifying Personal Motivators		Requested	06/26/09
Bashful Dwarf	How to Get More of What You Want From Your Job	Classroom	Completed	04/23/02
Bashful Dwarf	Introduction to iJournals	Classroom	Completed	10/09/03
Bashful Dwarf	Labor Schedules	Classroom	Completed	11/18/03
Bashful Dwarf	Property Policies and Procedures	Classroom	Completed	10/28/03
Bashful Dwarf	Managing Customer Interactions	Classroom	Completed	02/16/01
Bashful Dwarf	Introduction to Project Management	Classroom	Completed	04/24/02

Note the various View options available for the results

This search result includes a combined 65 records of training events for Doc Dwarf and Bashful Dwarf. The current view shows the first 10 items; left and right arrows allow scrolling through the complete list, or you can View All on one long screen. The spreadsheet icon offers the option to export the search results to Excel.

- Click on any **column title** (Name, Title, Type, Status, Status Date) to sort the results by that column.
- Click on any **course title link** to see detailed information about that particular course.

Check Team Members' Certifications:

You can view what certifications your team members have completed (or currently have in progress) by clicking the **Team Certification Status** link on any Team Members page. To view certification information for selected team members, click the checkbox(es) beside the team members' name(s) , choose Check Certification Status from the "Action" dropdown menu, and click the Go button:

Team Members

View Team Members Reporting To: Snow White | Go

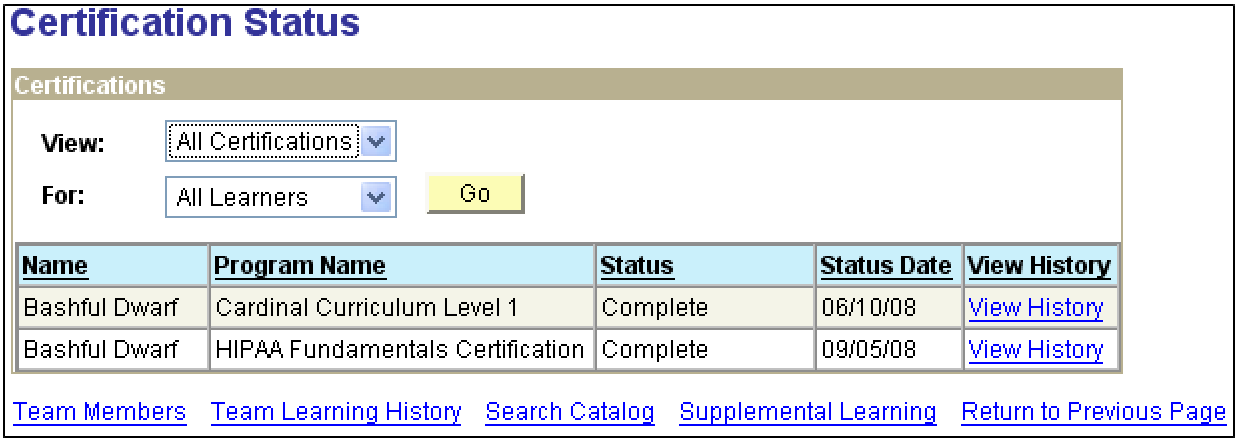
Direct Reports -- Snow White Customize | Find | View All First 1-2 of 2 Last

	Name	Job Title
☑	Bashful Dwarf	Internal Auditor
☐	Doc Dwarf	Internal Auditor

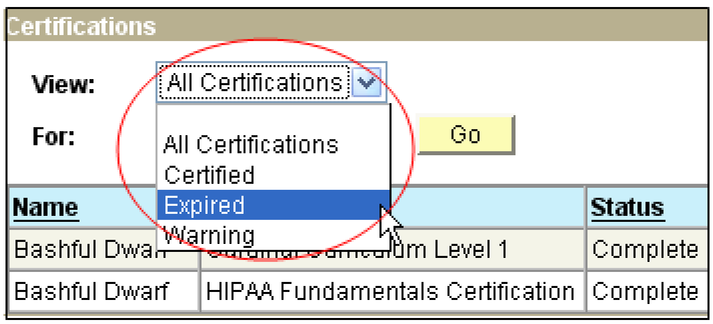
☑ Select All ☐ Clear All *Action: Check Certification Status | Go

Team Learning History Team Certification Status Search Catalog Supplemental Learning

The resulting page displays certification information for the selected team member(s):



You may further refine your search to display certifications of a selected status (Certified, Expired, or Warning):

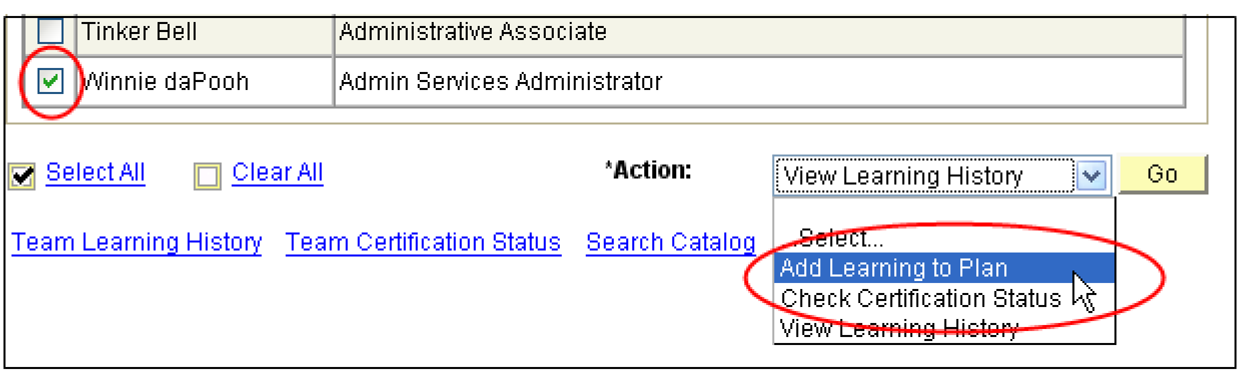


Add Learning to a Team Member's Plan

As a manager you can add learning activities to the Learning History/Plan for any of your team members. You may add activities directly from the STARS catalog, or manually add information about external learning activities not found in STARS ("Supplemental Learning").

To Add Learning from the STARS Catalog:

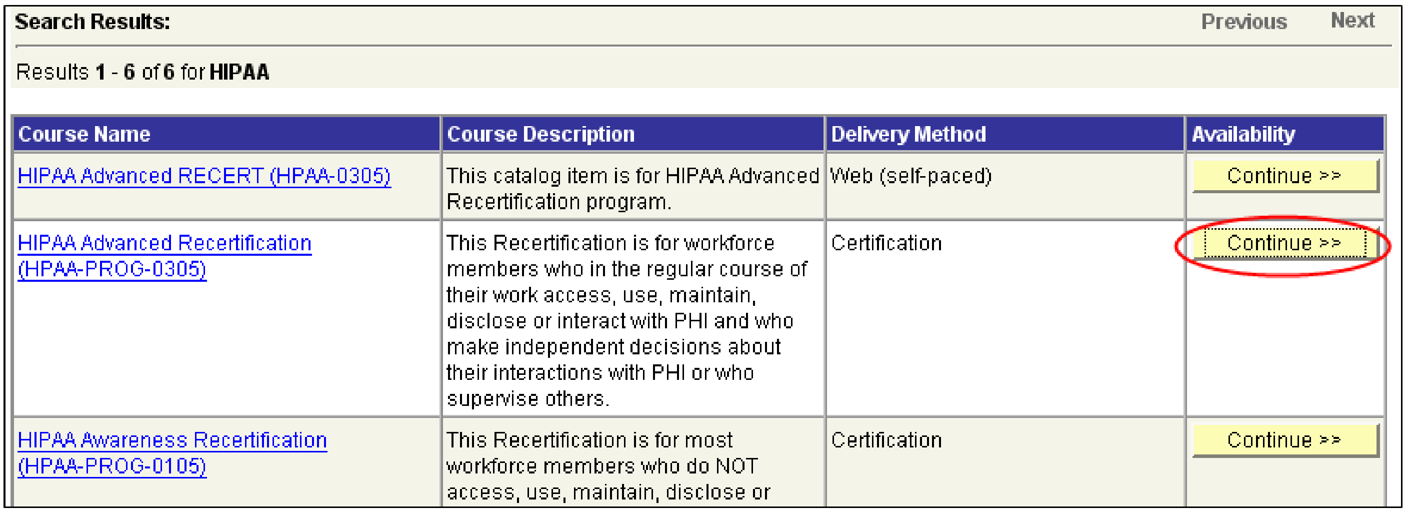
1. On the Team Members page, click the **checkbox** to select a team member, choose **Add Learning to Plan** from the Action pulldown menu, and click **Go**.



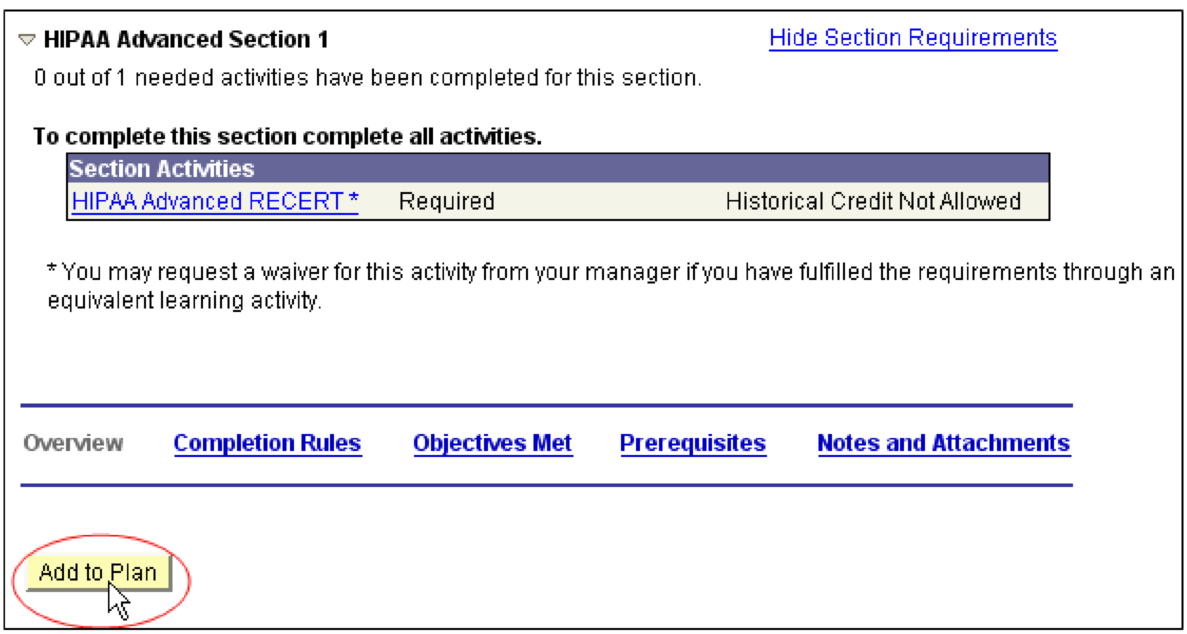
2. The Search Catalog page appears. **Enter a course title or other keyword** relevant to the training activity you'd like to add to your employee's Training Plan and click the **Search** button:

If the results do not include the course you're looking for, try searching for a different term.

3. When the desired learning activity appears in the results, click the **Continue** button to select it.



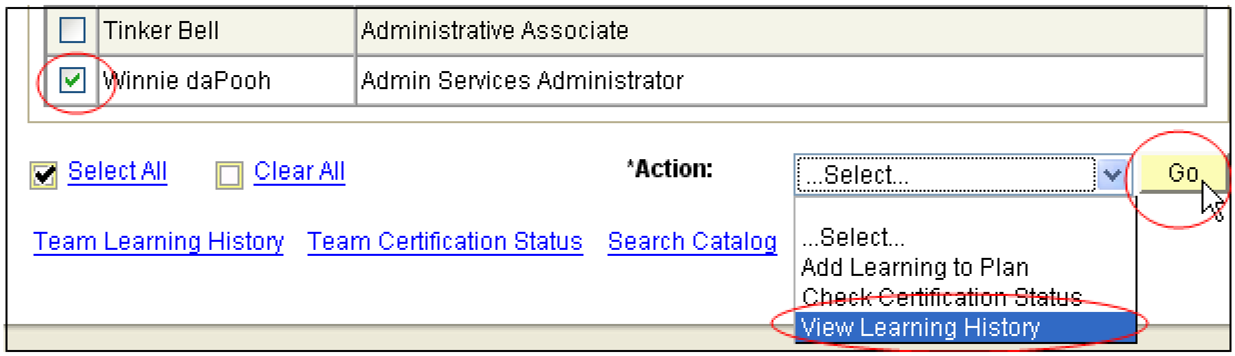
4. On the resulting detail page, click the **Add to Plan** button to add the activity to your employee's record as a Planned activity:



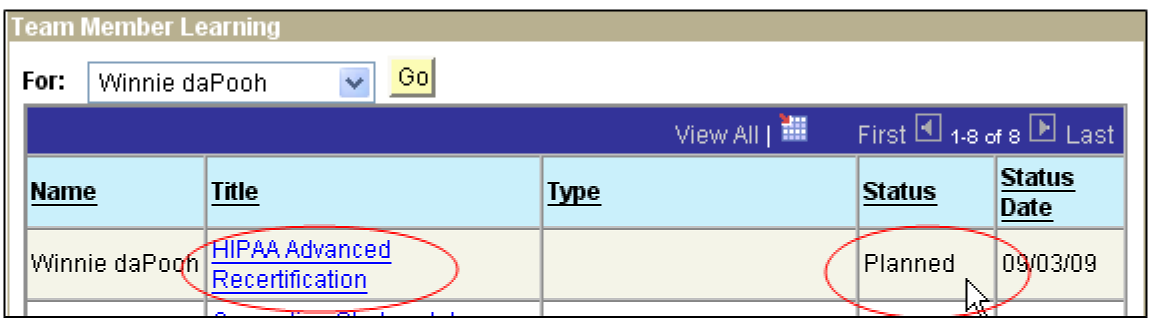
NOTE: Courses for which enrollment is currently **Closed** will not have an "Add to Plan" button available and you will not be able to add them to an employee's plan.

5. The system confirms that the training activity has been added to your employee's plan. Click the **Team Members** link to return to your team list.

6. Click the employee's **checkbox**, select **View Learning History**, and click **Go**:



7. The training activity has been added to the employee's learning history with a status of "Planned":



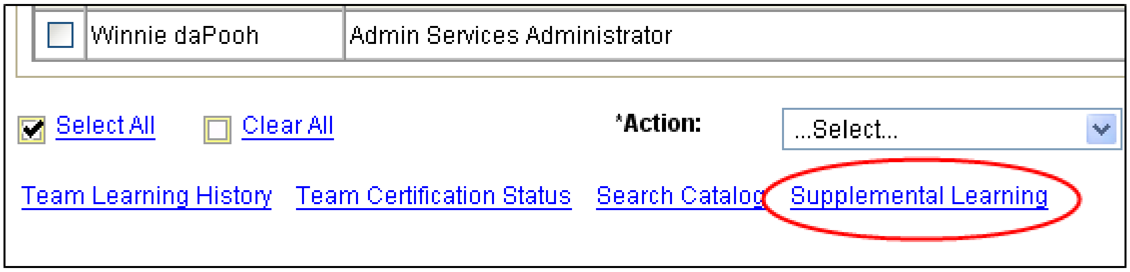
The employee will receive an e-mail message notifying him that you have added a training activity to his Learning plan.

IMPORTANT: Adding an activity/program to your employee's learning record DOES NOT REGISTER HIM or HER for the activity/program. You are effectively adding a bookmark to the employee's record as a recommendation of a training activity that you would like him/her to complete. Please be sure to let your employee know that s/he must go in to STARS and actively enroll in the recommended activity or program.

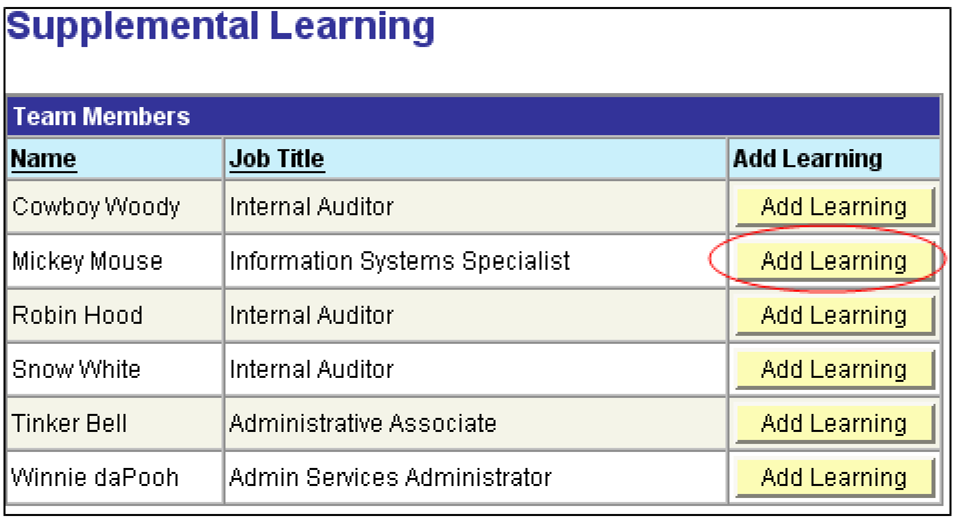
To Add Supplemental (i.e., External) Learning Activities or Events:

Managers may add learning activities not found in the STARS system to their employees' learning records (whether as recommended training or as after-the-fact notations) through the Supplemental Learning function.

1. On the Team Members page, click the **Supplemental Learning** link at the bottom.

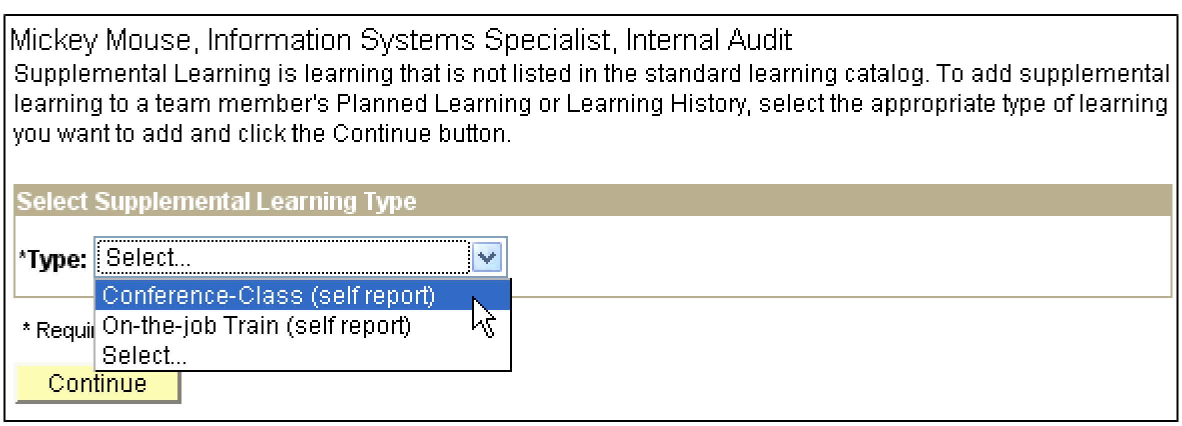


2. Click the **Add Learning** button in the row for the team member for whom you would like to add a learning activity.

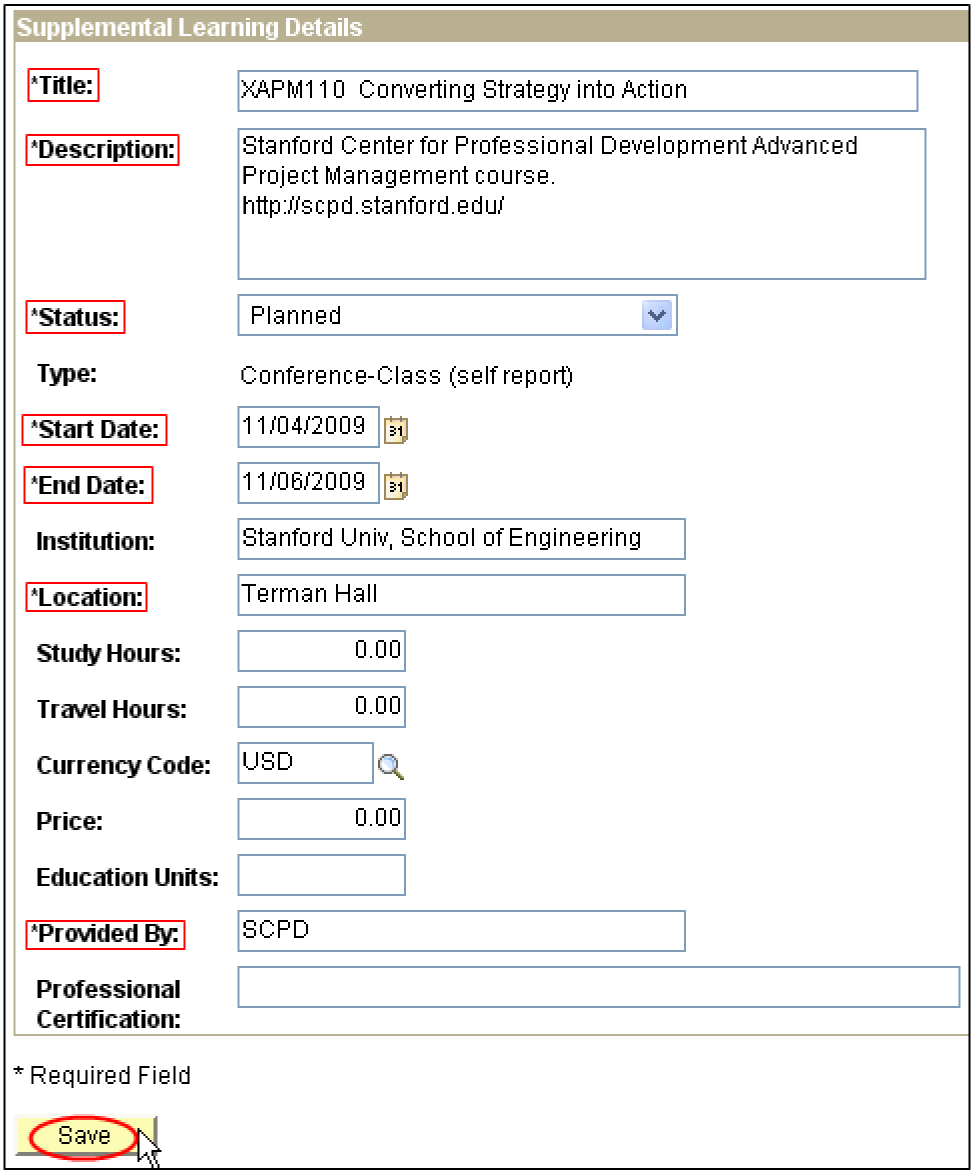


Name	Job Title	Add Learning
Cowboy Woody	Internal Auditor	Add Learning
Mickey Mouse	Information Systems Specialist	Add Learning
Robin Hood	Internal Auditor	Add Learning
Snow White	Internal Auditor	Add Learning
Tinker Bell	Administrative Associate	Add Learning
Winnie daPooh	Admin Services Administrator	Add Learning

3. Choose the type of learning activity you'd like to add to the employee's learning plan or history from the dropdown menu and click **Continue**.



4. Complete the information about the external training activity on the Supplemental Learning Details page and click **Save**. Be sure to provide information in all of the required fields.



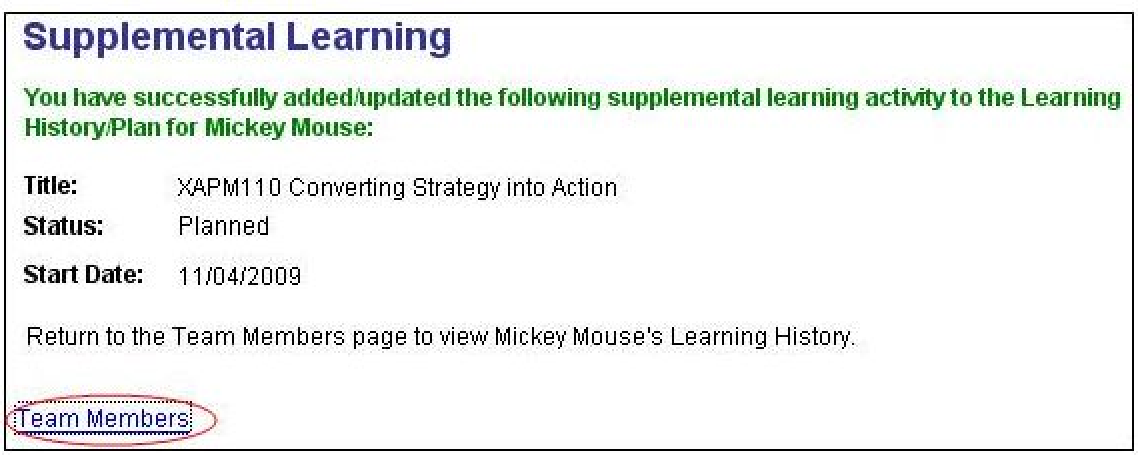
Supplemental Learning Details

*Title:	XAPM110 Converting Strategy into Action
*Description:	Stanford Center for Professional Development Advanced Project Management course. http://scpd.stanford.edu/
*Status:	Planned
Type:	Conference-Class (self report)
*Start Date:	11/04/2009
*End Date:	11/06/2009
Institution:	Stanford Univ, School of Engineering
*Location:	Terman Hall
Study Hours:	0.00
Travel Hours:	0.00
Currency Code:	USD
Price:	0.00
Education Units:	
*Provided By:	SCPD
Professional Certification:	

* Required Field

Save

A confirmation page will display:



Supplemental Learning

You have successfully added/updated the following supplemental learning activity to the Learning History/Plan for Mickey Mouse:

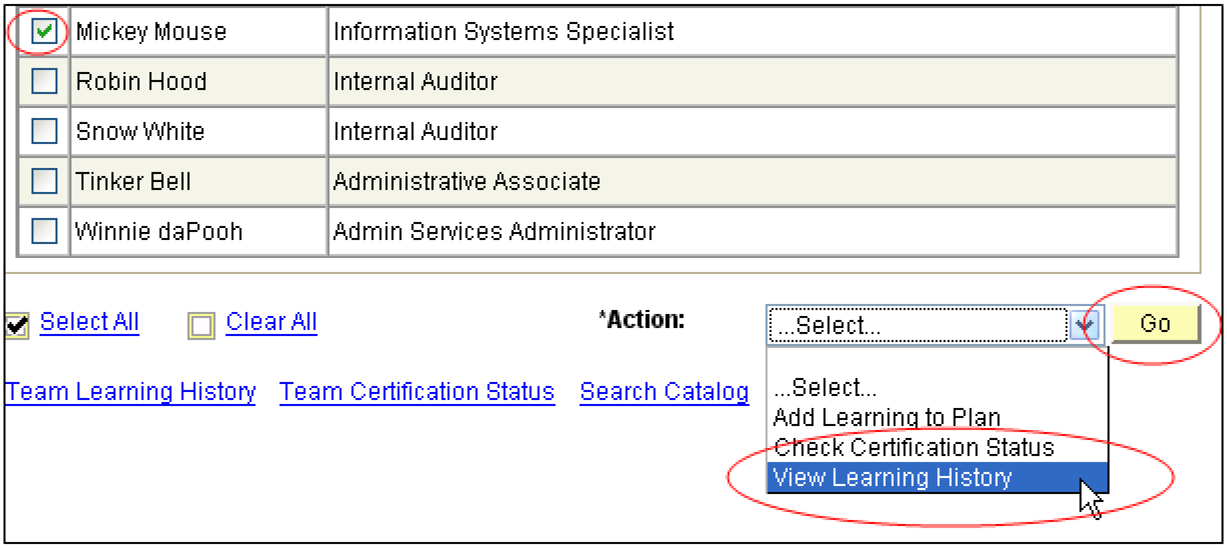
Title: XAPM110 Converting Strategy into Action
Status: Planned
Start Date: 11/04/2009

Return to the Team Members page to view Mickey Mouse's Learning History.

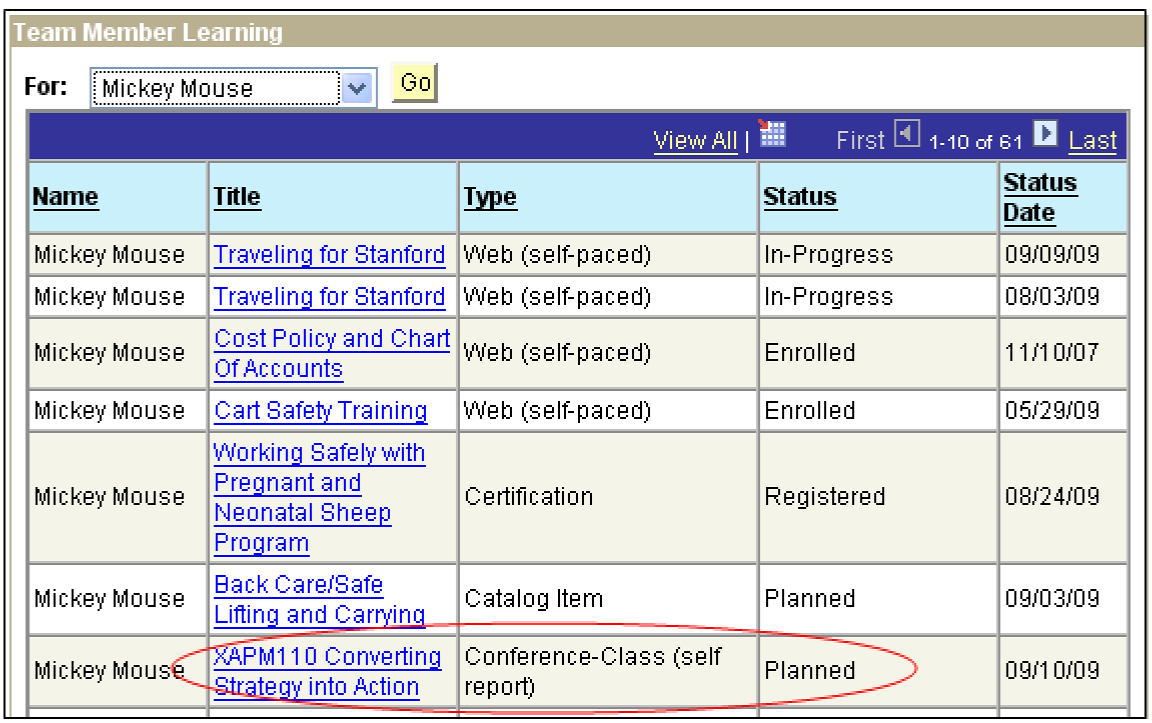
Team Members

5. Click the **Team Members** link to return to the Team Members page, from which you may pull up the employee's Learning History and confirm that the supplemental learning activity is now included there.

6. Click the employee's **checkbox**, select **View Learning History** from the dropdown menu, and click **Go**.



The newly added learning activity appears on the employee's Learning record with a status of "Planned".



Team Member Learning

For: Mickey Mouse Go

View All | First 1-10 of 61 Last

Name	Title	Type	Status	Status Date
Mickey Mouse	Traveling for Stanford	Web (self-paced)	In-Progress	09/09/09
Mickey Mouse	Traveling for Stanford	Web (self-paced)	In-Progress	08/03/09
Mickey Mouse	Cost Policy and Chart Of Accounts	Web (self-paced)	Enrolled	11/10/07
Mickey Mouse	Cart Safety Training	Web (self-paced)	Enrolled	05/29/09
Mickey Mouse	Working Safely with Pregnant and Neonatal Sheep Program	Certification	Registered	08/24/09
Mickey Mouse	Back Care/Safe Lifting and Carrying	Catalog Item	Planned	09/03/09
Mickey Mouse	XAPM110 Converting Strategy into Action	Conference-Class (self report)	Planned	09/10/09

IMPORTANT: Adding Supplemental Learning to your employee's learning record DOES NOT REGISTER HIM or HER for the learning event. You are effectively adding a learning record as either a recommendation of a training activity, or as acknowledgment of training completed outside of STARS. NOTE that Supplemental Learning items will not appear on ReportMart1 Learning History reports.