Step-by-Step Instructions

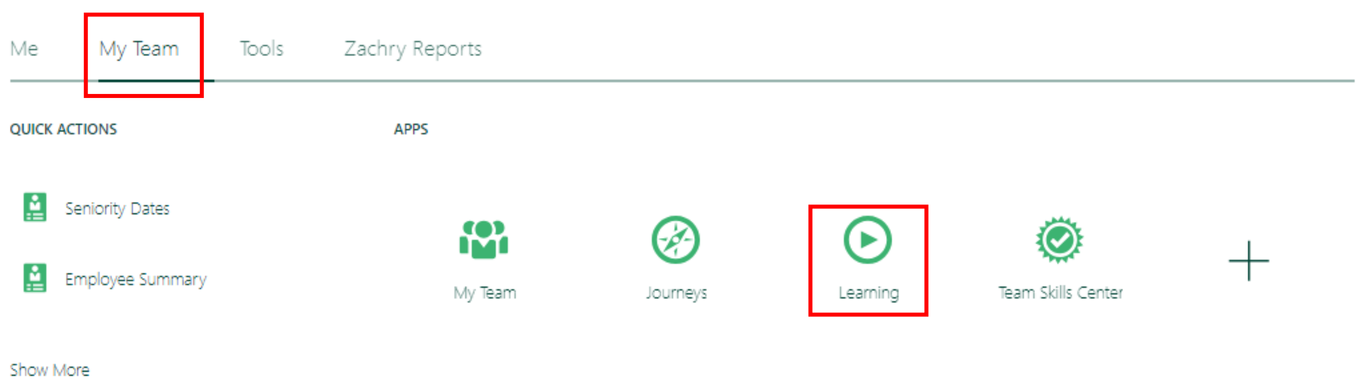
Zachry Business Use Case

Manager's will have the ability to see all trainings that have been started, in progress, and completed by all of their Direct Reports.

View All Learnings Records for Direct Reports

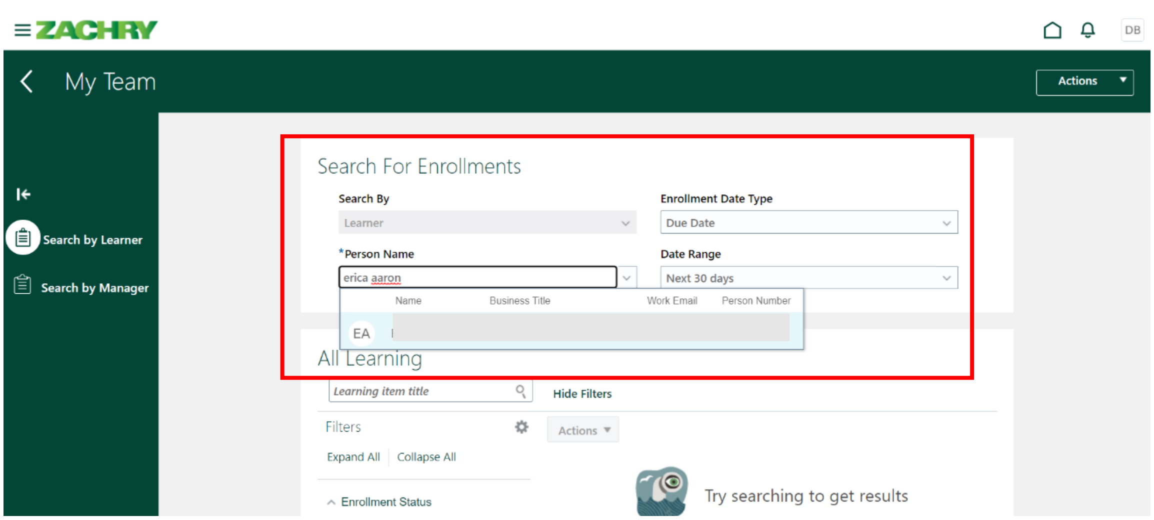
Performed by: Manager

1. From the **Homepage**, navigate to the **My Team** and click on the **Learning** icon**.**



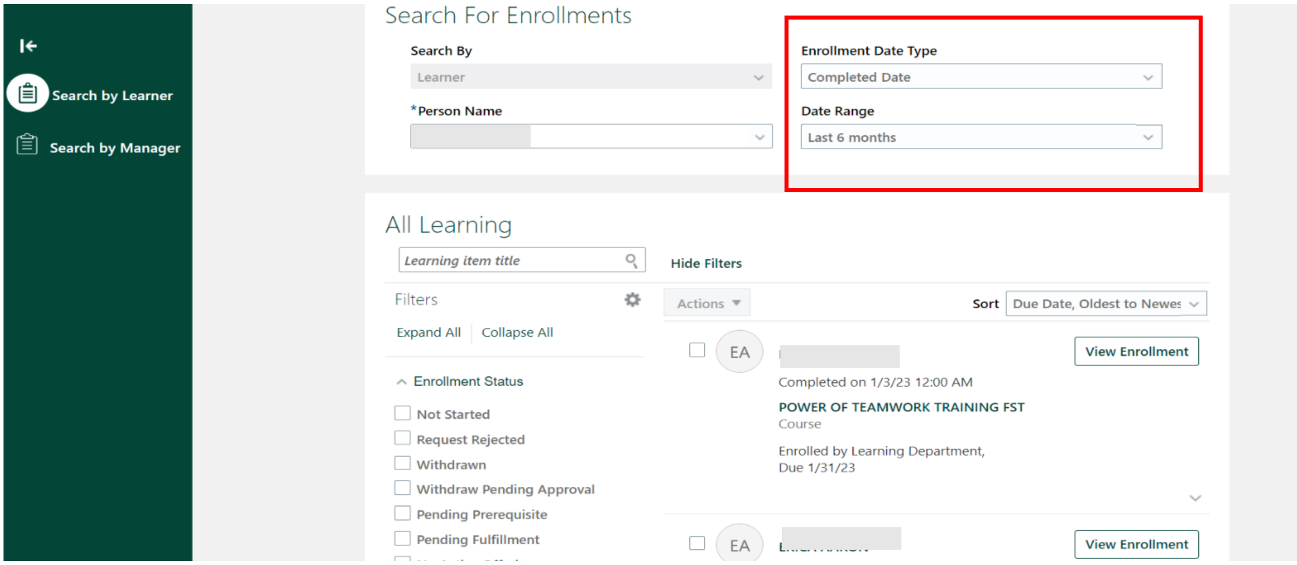
View the Training Status Individually for Learners:

2. On the **Search by Learner** page, search for the employee for whom you wish to view the training by typing their name in **Person Name** field.

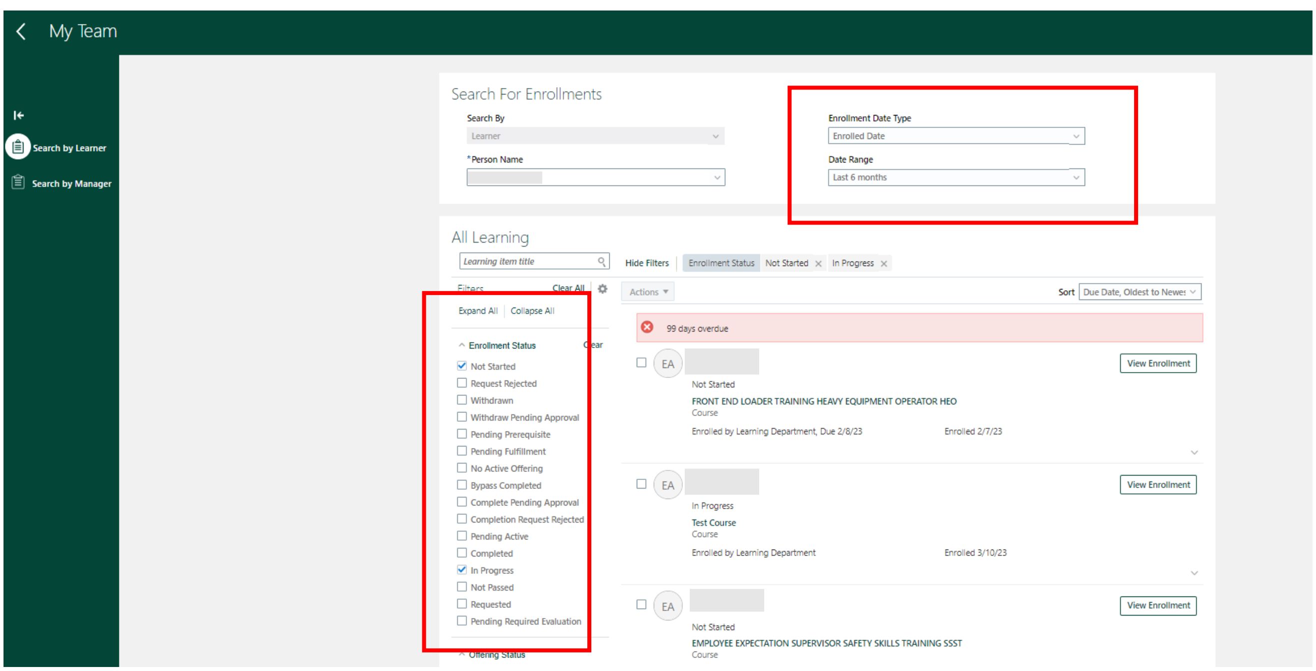


3. Select the appropriate **Enrollment Date Type** and **Date Range**. The results appear based on Date Type and Date Range selected.

4. To view completed trainings, set the **Enrollment Date Type** to *completed* and select the appropriate date range.

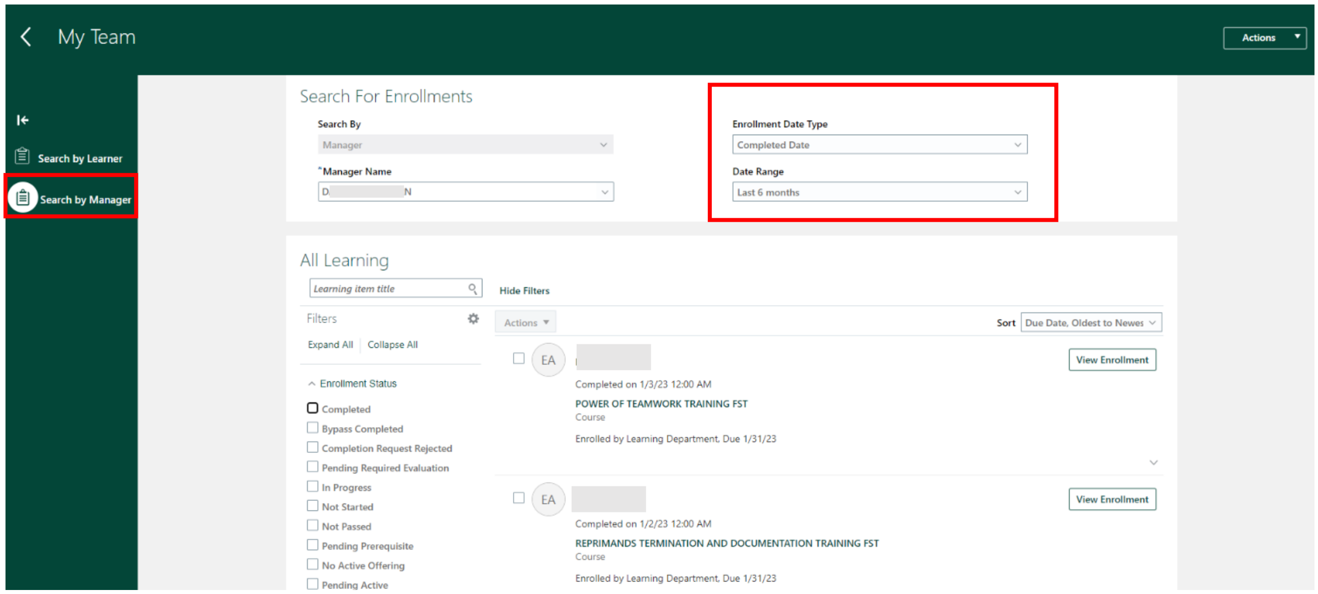


5. To view **In Progress** or **Not Started** trainings, set the **Enrollment Date Type** to *Enrolled* and select the appropriate date range. Additionally, select the **Enrollment Status filter** on the left by clicking on the checkbox next to **In Progress** and **Not Started**.



View the Completed Trainings for the Entire Team:

6. Click on the **Search by Manager** tab, then select the appropriate **Enrollment Date Type** and **Date Range**. The results appear based on Date type and date range selected. If you need to view completed trainings, set the **Enrollment Date Type** as *completed* and select the appropriate date range.



7. To view **In Progress** or **Not Started** trainings, set the **Enrollment Date Type** to *Enrolled* and select the appropriate date range. Additionally, select the **Enrollment Status** filter on the left by clicking on the checkbox next to **In Progress** and **Not Started**.