University Supervisor Guide

Supervisors have a **My Team** tab listing their supervisees as identified through the Penn Profiler. If the team members’ data is incorrect, they can log into Profiler themselves and easily correct the information. Other new functionality includes:

- **Learning Plans**: can see currently assigned, incomplete training as well as completed training that has retraining requirements (periodicity) for all their supervisees. Optional self-enrolled courses can also be seen.
- **Dashboard**: with one click, it lists details on all supervisees’ overdue and soon due (30 days and 60 days options) courses. An efficient way to see an overview of all supervisees’ training at once.
- **Learning Reports**: can efficiently run and download Learning Plan and Learning History reports for direct and indirect reports (supervisees).
- **Organizational Chart**: see at a glance the organizational structure below them including direct and indirect reports.

### OVERVIEW DASHBOARD

1. Click the **Dashboard** link in **Supervisor Links**

   By setting the **Due Date**, you can see which employees have overdue or soon due courses and what they are.

### LEARNING REPORTS

1. Click **Learning Reports** in **Supervisor Links**
2. Expand **Learning Plan** for current courses
3. Select the **CSV** option if you want to manipulate the results, otherwise select **Learning Plan**
4. Set your formatting as desired
5. Click **Run Report**
6. The status of the report (in queue, generating) will display as your report runs in the browser window.

PSOM supervisors will have the option to set up a **delegate**. This tool is being piloted and may be more widely available in the future. For more information, click [here](#) for manager tutorial.
OVERVIEW DASHBOARD – view overdue and soon-due courses for all team members

REPORTS – select report

REPORTS – set criteria

REPORTS – results