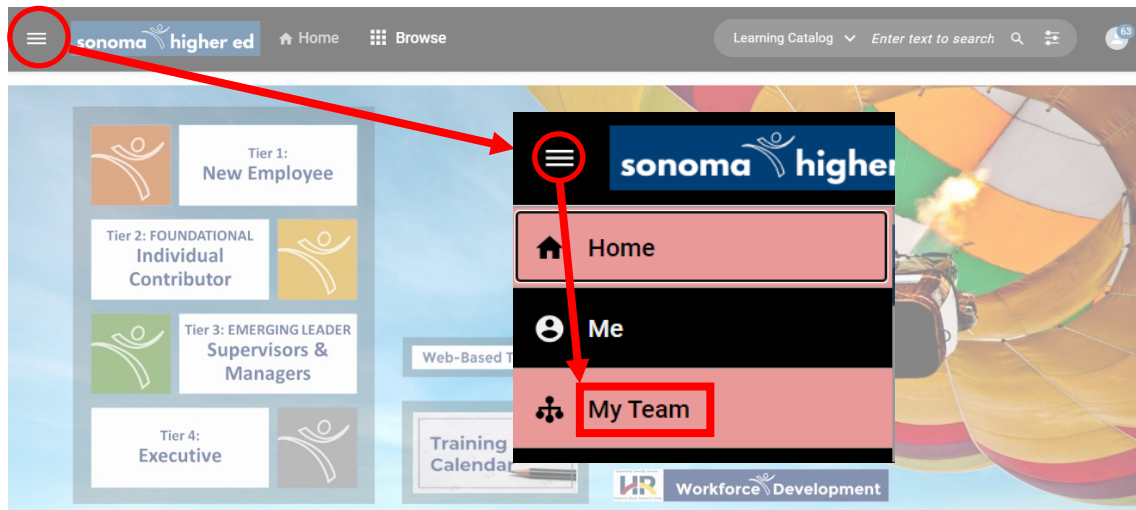


My Team: Overview & Reference Guide

What is My Team?

If you manage or supervise staff, you have access to the My Team function of **sonoma higher ed**. To access, select the **"hamburger"** icon and select **My Team** from the drop down menu.



My Team Overview

The **My Team** overview page gives you a quick preview of your team. Based on your privileges, you can view members and even search for a specific team member directly using the person search. The page also provides you with bulk actions for the entire team.

Note: your team will only consist of your direct reports per the HRIS org structure.

Direct Team		Person	Filters	Pending Approvals 0
NAME	UPCOMING	OVERDUE	APPROVAL	
Judy Bright ! Customer Service Rep Chicago, (GMT-06:00) Central Time (US & Canada) : 12:00 PM Offline Go to	0	14	0	ACTIONS ^ Check-in Nudge Leave an Impression View/Edit Mentors View/Edit Talent Profile
Steve Wade ! Customer Service Team Lead Dallas, (GMT-06:00) Central Time (US & Canada) : 12:00 PM Offline 4 Direct Reports Go to	0	14	0	
Yurika Kubo ! Customer Service Rep Chicago, (GMT-06:00) Central Time (US & Canada) : 12:00 PM Offline Go to	0	13	1	ACTIONS v
Patricia Marks ! Customer Service Rep Chicago, (GMT-06:00) Central Time (US & Canada) : 12:00 PM Offline Go to	0	9	0	ACTIONS v

INSIGHT
TEAM ACTIONS
 Assign Learning
 Request Learning
 Launch Org Chart
 Add Completed Course
 Assign Checklist




View your team overview page

The team overview page displays your team member names in a tabular format with the following columns:

Upcoming - Displays items that are assigned to members with a due date in the next 7 days, including today.

Overdue - Displays items that are assigned to members with a past due date.

Approval - Displays items that a member has submitted but require manager's approval to complete the process.

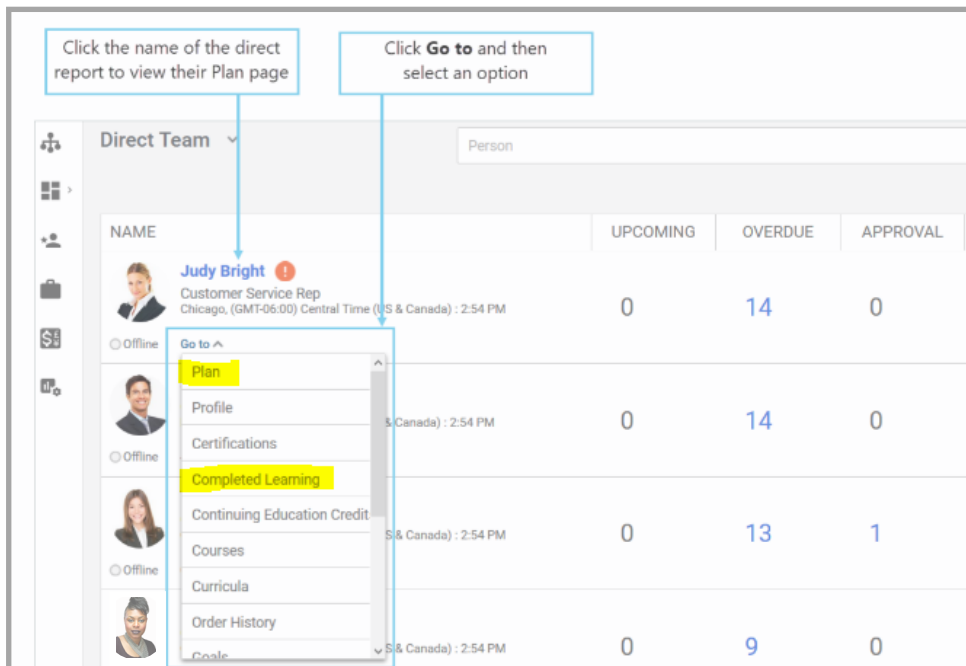
NAME	UPCOMING	OVERDUE	APPROVAL
 Aaron Good ! Customer Service Director Chicago, (GMT-06:00) Central Time (US & Canada) : 1:41 AM Offline 8 Direct Reports Go to ▾	0	66	3
 Todd Oakley ! Consulting Director Sydney, (GMT-06:00) Central Time (US & Canada) : 1:41 AM Offline 6 Direct Reports Go to ▾	0	58	0
 Judy Womack ! Nurse Director Dallas, (GMT-06:00) Central Time (US & Canada) : 1:41 AM Offline 5 Direct Reports Go to ▾	0	26	0





View your team member's plan pages

As a manager, you can view your team member's plan pages or go to specific areas in their plan pages.

Click the name of the direct report to view their Plan page

Click **Go to** and then select an option



NAME	UPCOMING	OVERDUE	APPROVAL
 Judy Bright ! Customer Service Rep Chicago, (GMT-06:00) Central Time (US & Canada) : 2:54 PM Offline Go to ^ Plan Profile Certifications Completed Learning Continuing Education Credit Courses Curricula Order History Goals	0	14	0
 Person 2 ! Customer Service Rep Chicago, (GMT-06:00) Central Time (US & Canada) : 2:54 PM Offline	0	14	0
 Person 3 ! Customer Service Rep Chicago, (GMT-06:00) Central Time (US & Canada) : 2:54 PM Offline	0	13	1
 Person 4 ! Customer Service Rep Chicago, (GMT-06:00) Central Time (US & Canada) : 2:54 PM Offline	0	9	0

Assign Learning to your team members

Use the **TEAM ACTIONS** column...

UPCOMING	OVERDUE	APPROVAL
1	0	0
0	0	0

TEAM ACTIONS

- Assign Learning
- Enhanced Assign Learning
- Request Learning
- Launch Org Chart
- Add Completed Course
- Assign Checklist

... to **ASSIGN LEARNING**

1. Select REGISTER
2. Search for a CLASS or training topic
3. Click the + symbol
4. Indicate if the course is MANDATORY
5. Click the + symbol
6. Click REGISTER

Assign Learning

☒ Register ☐ Add to plan ☐ Assign & Enroll

Register for **1** more classes now. Order Contact [] Currency: US Dollars

Select Learning Item

email [] Filters

Title	Delivery Type	Seats	Due Date	Select
WORKDEV - Email Etiquette 61691435	Web-Based	N/A	Select date	3 +

Add Person

Person Search [] Filters

Direct Team UPLOAD CSV ☐ SELECT ALL

Name	Manager	Mandatory	Select
0768-RMAJH - RISK MANAGEMENT ANALYST III (HRD - Workers Compensation Ins.)	[]	4 Yes No	5 +
0766-RISKMANAGER - RISK MANAGER (HRD - Benefits Administration)	[]	Yes No	+

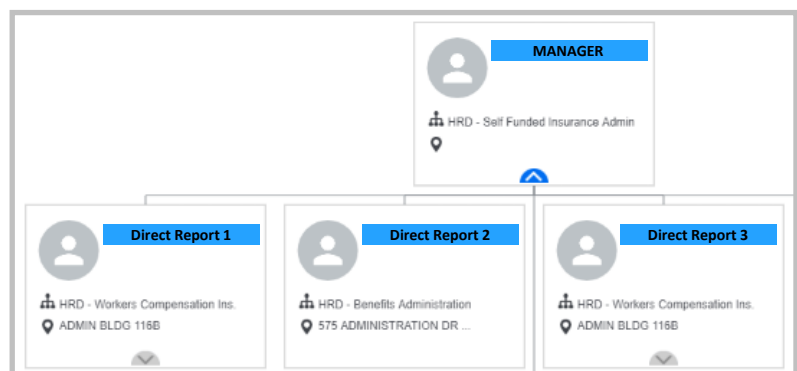
5 PER PAGE < 1 > Of 1

6 REGISTER

... to **LAUNCH ORG CHART**

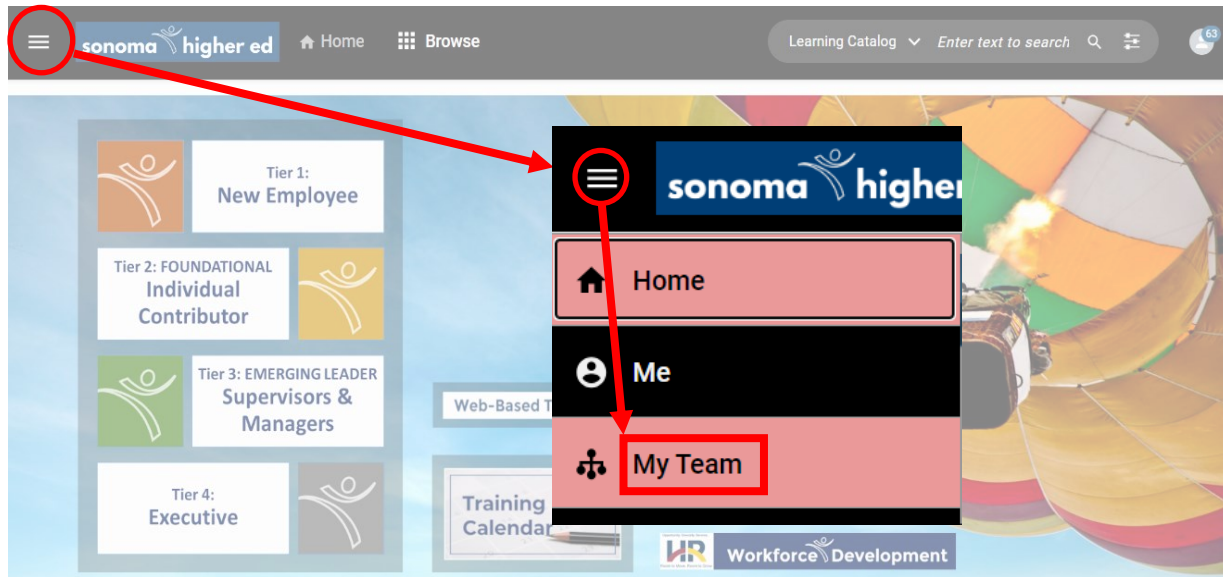
If you have direct reports listed who are no longer in your unit, share this information with your department payroll clerk.

Payroll clerks must update the HRIS record of employee to remove from your unit.

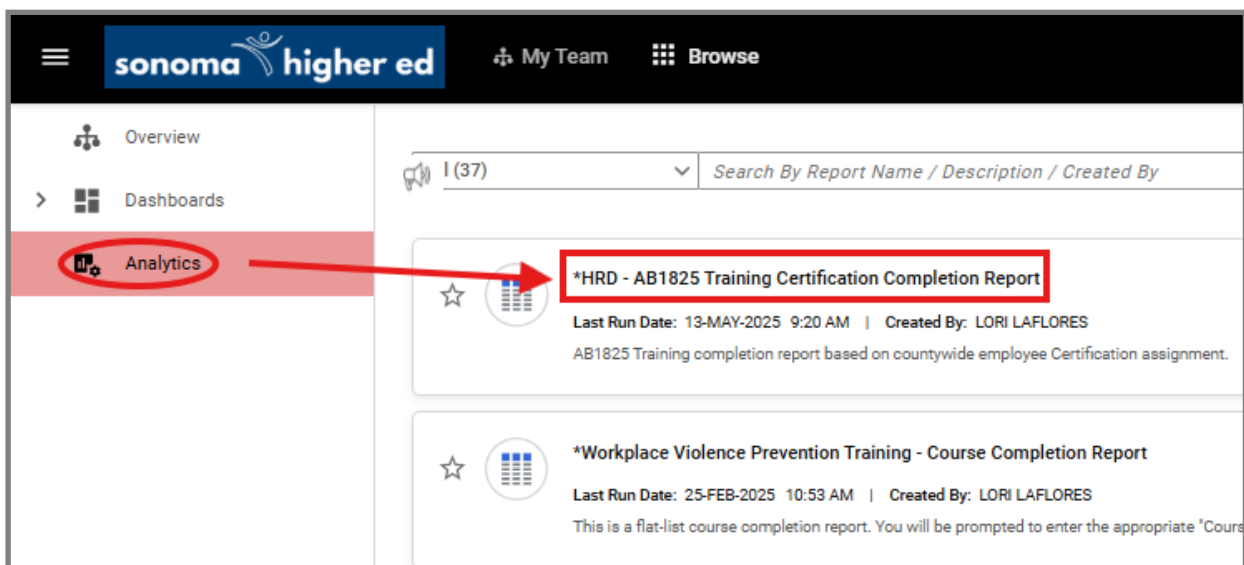


View Reports for your team members

Go to **MY TEAM...**



Select **ANALYTICS** and click report name...



**NOTE: Managers can only see Direct Reports per HRIS data org structure.
Reach out to your payroll clerk with discrepancies.**