SumTotal Learn

Getting Started as a Manager

Version 17.1
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Introduction

SumTotal Learn is a Web-based application that provides you with the tools necessary for finding training, managing learning, and tracking your professional growth. Through Learn, you have access to classes and courses, training schedules and details about traditional learning events, as well as access to performance support and knowledge documents.

Objectives of this Guide

In this document, you will learn how to use Learn for managing training and tracking skills for performance management in Manager mode. You will not learn everything about Learn – just enough to get comfortable navigating and exploring some key features and capabilities.
Log on to SumTotal

The first time you access the Sign In page, you will be prompted to enter the username and password that have been assigned to you.

You can change your password after you have successfully logged on to the system. If you forget your password, click the Forgot your password? link on the logon page.
About User Roles

Depending on your role in SumTotal (such as learner or manager) you may access different pages that appear under different menus. Each role provides options for specific tasks, such as the ability to publish training to the system or to manage employee information. If you have permission to access features in more than one role, you can switch between these roles by choosing one of the icons in the Header menu.

The following table displays role names, menu icons, and descriptions.

<table>
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<tr>
<th>Role</th>
<th>Icon</th>
<th>Description</th>
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<tbody>
<tr>
<td>Learner</td>
<td>![User Icon]</td>
<td>Provides access to training and learning activities available to you. If you are an instructor, you can also access your Instructor Schedule from this menu.</td>
</tr>
<tr>
<td>Manager</td>
<td>![Users Icon]</td>
<td>Provides information about training- and performance-related information for users that managers are allowed to view. Reports are available for individuals and workgroups.</td>
</tr>
<tr>
<td>Administrator</td>
<td>![User Icon]</td>
<td>Allows users to create, manage, and configure all components that are tracked by SumTotal. Employees with permissions to publish online training use this role to make training available.</td>
</tr>
</tbody>
</table>

Depending on your role, permissions, and product licenses, you may not have access to every menu icon or option.
Establish Your Preferences

SumTotal allows you to arrange how you will see and access information on the site. Once you access the site, you should immediately set your preferences to ensure that you have quick access to the information you need.

1. Click the icon on the top-right corner of the SumTotal interface.
2. Click Edit Your Profile.

3. Select the Regional settings to reflect your preferred language.
4. Select the Time zone to reflect your local time zone.
   
The time zone that you choose on the Preferences page determines what you see as the start time and end time for classes and other training events. You will see all training activities in your time zone.
   
   If you change the time zone setting, the system will adjust the times for your scheduled training to match the new time zone setting.

5. Select the check boxes under Options to determine the items that should appear on your Home page.
6. Scroll to the bottom of the page and click OK to save your changes.

Note: You can also update your password and other information in SumTotal. To do this, click the Profile link. Be sure to click OK at the bottom of the screen to save your changes.
Search for Items

The Search icon displays at the top of all SumTotal pages. You can use Enterprise Search to find:

- **Navigation**: Search for menu items and pages within the SumTotal Suite. You can click on the item to go directly to the page.
  
  For instance, if you want to access your Profile but are unsure of its location in the menu structure, enter "Profile" in Enterprise Search and it displays menu items under the Navigation search type. If you are an administrator, entering "Profile" also retrieves a link to the Profile and Team Configuration page.

- **People**: Search for employees by applicable attributes, such as first name, last name, or job title.

- **Activities (Learn users only)**: Search for learning activities and content, such as curricula, courses, or documents. If you are integrated with Skillsoft, you can also search for Skillsoft assets.

- **Reports (Advanced Reporting users only)**: Search for Reports, Ad Hoc Views, or Domains (if the user has permission to create Ad Hoc Views in reporting) that you have the security rights to access by either name or keywords within the title or description.

- **Learning Content (Skillsoft integrated users only)**: Search for Skillsoft Books and Videos.

**Note**: Enterprise Search tailors its results to your role and permissions. So, for example, only users with administrative permissions receive results related to Administrator menu items.

1. Click .

   The Enterprise Search panel slides out to reveal a Search entry box as well as a graphical menu of available, common actions (such as Find a Course or Find Another Person).

**Note**: The widgets displayed vary depending on settings defined by your administrator, as well as your permissions and integrated products. For example, if you do not use Advanced Reporting, then tiles related to reports do not display.
2. (Optional) Click on any of the available widgets for a guided experience about how to use Enterprise Search to find the desired information and/or perform any necessary actions. For example, clicking **Find a Course** displays a general description, tips for what you can enter in the **Search** box, and links to alternate suggested pages where you can find the desired activity.

You can click on any available options or search for information using the **Search** box. See the next step for details.
3. (Optional) If you know you want to look for a specific search type, use the drop-down to the left of the **Search** box to immediately narrow your results.
You will have opportunities later to narrow your results by type as well.

4. Enter your search criteria in the **Search** box.
Enterprise Search allows users to enter complete, partial, or grouped keywords in fragments (manage team book jane Smith) using their language preference. It is flexible enough to handle:

a) Variant endings. For example, searching for Manage also returns results for Manager or Management.

b) Synonyms. For example, searching for Manager also returns results for Supervisor. Synonyms are system-defined and not editable.

Once you begin typing, Enterprise Search suggests content that most closely matches your selected object type. You can select one of those results, or, if no matching results appear, you can press **Enter** to see a list of all results that match what you have entered. If you press **Enter**, the left-hand panel also shows an at-a-glance summary of the number of results found in each search type category (such as **Activity** or **People**).
5. Locate the item you want.

The most relevant results display in the Enterprise Search panel. From here:

- If you see what you need, click the item to navigate to the appropriate page, or perform any available Actions.
- Click on one of the Search Types such as **Activity** or **People** using either the left-hand panel or the drop-down menu next to the **Search** box to see a full list of search results from that type.
- Click View All for a complete list of results, organized by Search type, and use filters to narrow your search.
- Save your search for future use.
Use Development Plans to Map Professional Growth

Development plans bring together skills, training, experiences, and user-defined items to:

• Establish goals and activities for personal development.
• Establish timeframes and actions for addressing the goals.
• Track and report progress.

You can create a group plan from the Plan menu by clicking the New button on the Development Plans page. Use online Help to learn more about these features:

• Create, delete, and update plans. Development plans are powerful tools if they are relevant and up-to-date. Keep your development plans current by updating them to reflect goals.
• Assign a plan to participants.
• Change the status of a plan. You can activate or deactivate a plan.
• Print a plan. If you prefer to review details in a hard copy format, you can print a development plan.
• Export data. You can review a plan offline by exporting it to Microsoft Excel.

Add to a Development Plan

You can add goals and activities to an existing individual development plan from many sections in SumTotal. A development plan contains goals and goals contain activities. You can add goals and activities as your need for learning develops. This keeps your development plan relevant and current.

Add Skills

If you select a skill and add it to a development plan, SumTotal will add a new goal with the name of the skill. You can add skills to a development plan from the following sections:

• Skill analysis
• Alternate job analysis for skills required
• Alternate organization analysis for skills required
Add Training

If you select training to add to a development plan, SumTotal will add a new goal called **New Goal** and add an activity with the name of the selected training course. You can add training to a development plan from the following sections:

- Training
- Alternate job analysis for training required
- Alternate organization analysis for training required
Additional Information

Online help has more information about tasks you can complete as a manager. Click the Help link on any manager menu page to access topics relevant to the tasks you are performing.

You can also refer to the SumTotal Learn Manager Guide for more information about working as a Manager.