SumTotal Learn Enterprise 2014.2 Getting Started with Manager Mode
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Introduction

Enterprise Learning is a Web-based application that provides you with the tools necessary for finding training, managing learning, and tracking your professional growth. Through Enterprise Learning, 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.

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

Logging on to SumTotal

The first time you access the Log On 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, contact the SumTotal administrator in your company.
About User Modes

Depending on your role in SumTotal (manager, employee, and so forth) you may access different pages that appear in different modes. Each mode provides features for specific roles, 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 mode, you can switch between these modes by choosing one of the mode buttons at the top of each page. In this document, we will focus on Administrator mode.

The following table displays mode names, descriptions, and corresponding mode icons.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
<th>Mega Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner</td>
<td>Provides access to training and learning activities available to you.</td>
<td>Learner</td>
</tr>
<tr>
<td>Manager</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>
<td></td>
</tr>
<tr>
<td>Content Manager</td>
<td>Provides management features for online course development.</td>
<td>Content Manager</td>
</tr>
<tr>
<td>Author</td>
<td>Provides the features necessary for the development of online courses. Only internal courseware developers have access to these areas.</td>
<td>Author</td>
</tr>
<tr>
<td>Content Reviewer</td>
<td>Allows reviewers to evaluate courses for accuracy, effectiveness, and completeness. Reviewers can raise issues for discrepancies they find.</td>
<td>Content Reviewer</td>
</tr>
<tr>
<td>Administrator</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 mode to make training available.</td>
<td>Administrator</td>
</tr>
<tr>
<td>Reporting</td>
<td>Provides interactive reporting and analysis for measuring the impact of training within an organization.</td>
<td>Reporting</td>
</tr>
<tr>
<td>TotalPerformance</td>
<td>Users with appropriate permissions can set employee goals, conduct performance appraisals, and produce useful reporting and analytics giving you up-to-date insight into the organization’s talent management.</td>
<td></td>
</tr>
</tbody>
</table>
Establishing 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.

To establish your preferences:
1. Click the Profile link on the top-right corner of the SumTotal interface.
2. Click Preferences.
3. Select the Regional settings to reflect your preferred language.
4. Select the Time zone to reflect your local time zone. All training activities and events display in your time zone.
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 update your password and other information in SumTotal. To do this, click the Profile link, then select the Profile tab. Be sure to click the OK button at the bottom of the screen to save your changes.

Viewing Individual Users or a Workgroup

In Manager mode, you can work with an entire workgroup or the individuals in a workgroup. Workgroup view is used for tasks such as group competency assessments and development plans; this view is the default view in Manager mode. Switch between workgroup view and individual view by clicking the name of the View.

To switch to individual view:
1. Click the name of the View on the top-right corner of any page.
2. Enter the name of a user you wish you view and click GO.
3. Select the user from the list that appears.
4. Click OK.

When you are viewing an individual user, Manager mode behaves much like Learner mode.

**Using 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.

**Adding 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.

**Adding 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

**Adding 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
Working with Competency Assessments

A competency assessment measures how well an individual utilizes skills and understands concepts. These assessments can be used to:

- Analyze employee skills and competencies
- Assist with employee reviews
- Survey employee satisfaction
- Conduct 360-degree reviews
- Generate needs assessments
- Assist with planning for the future (company and employee)

A competency assessment contains questions entered by the person who creates the assessment. After preparation of a competency assessment is complete, it is assigned to specific people who answer the questions. As soon as the time period to answer the questions in the assessment has expired, the results are available in a report.

Additional Information

Online help has more information about tasks you can complete in Manager mode. Click the Help link in any page in Manager mode to access topics relevant to the tasks you are performing.
Survey Invitation

Your Opinion Counts!

We would like to know your thoughts about our documentation. We are committed to providing the best documentation to you and your candid feedback is critical to our focus on continuous improvement.

This survey should take about 3 to 5 minutes to complete.

Please click the link below to start the survey:

Documentation Survey
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