SumTotal Learn

Getting Started as a Learner

Version 18.1

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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 finding and managing your training. 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.

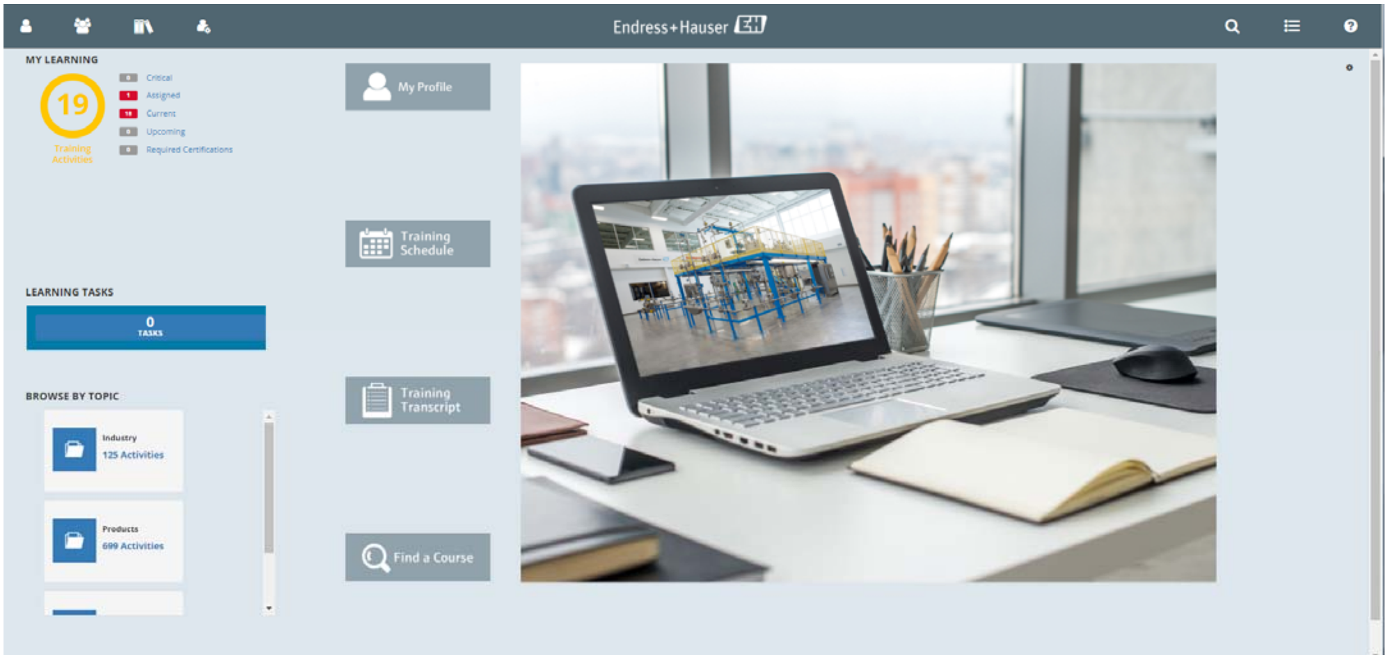
The following table displays role names, menu icons, and descriptions.

Role	Icon	Description
Learner		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.
Manager		Provides information about training- and performance-related information for users that managers are allowed to view. Reports are available for individuals and workgroups.
Administrator		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.

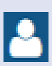
Depending on your role, permissions, and product licenses, you may not have access to every menu icon or option.

Exploring the SumTotal Interface

The Dashboard displays when you log in to the system.



The Learner Dashboard offers the following options:

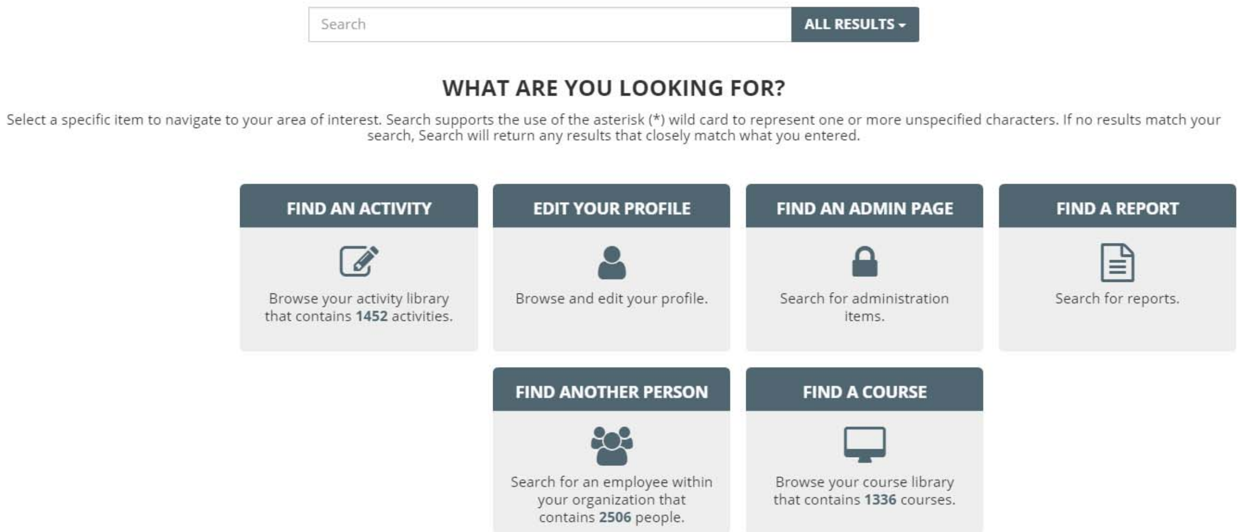
Options	Descriptions
Roles	Navigate to different roles by clicking the appropriate icon (such as  for administrative functions). The number of available roles vary based on your security permissions.
	Use this menu to access user-related activities such as your Profile and Preferences or Training Schedule.
	Navigate to the Timeline to view and perform actions on pending tasks.
	Access the Library to look for training-related information such as courses, knowledge documents, and so on.

Options	Descriptions
	Find the training you need quickly by using the Enterprise Search feature.
	Use this option to get online assistance while performing various tasks in the application.

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.

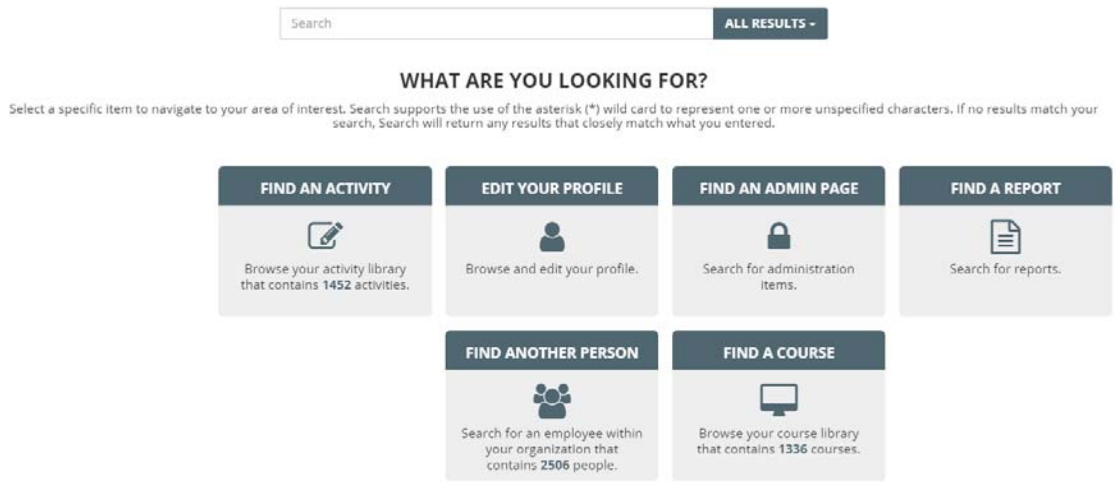
- **People**: Search for employees by applicable attributes, such as first name, last name, or job title.
- **Activities (Learn users only)**: Search for learning activities and content, such as curricula, courses, or documents. If you are integrated with Skillsoft, you can also search for Skillsoft 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 .

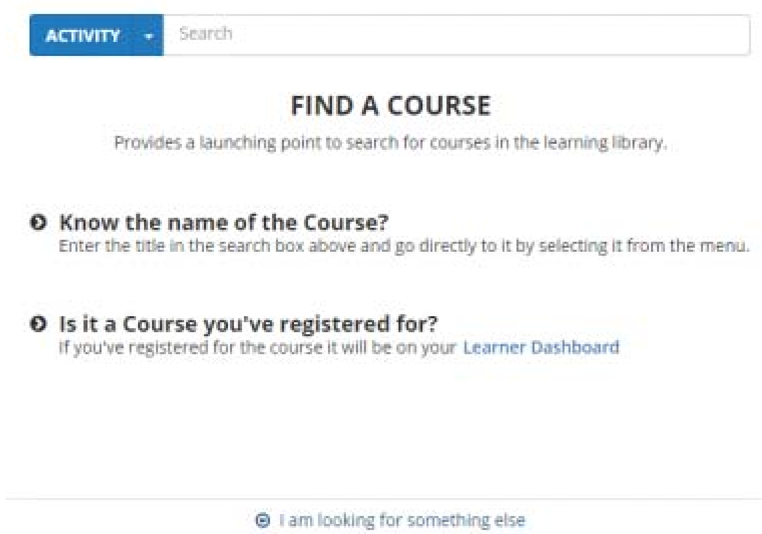
    The Enterprise Search panel slides out to reveal a **Search** entry box as well as a graphical menu of available, common actions (such as **Find a Course** or **Find Another Person**).

***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.

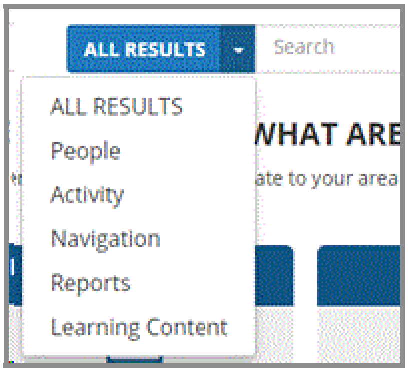
   For example, clicking **Find a Course** displays a general description, tips for what you can enter in the **Search** box, and links to alternate suggested pages where you can find the desired activity.



   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.

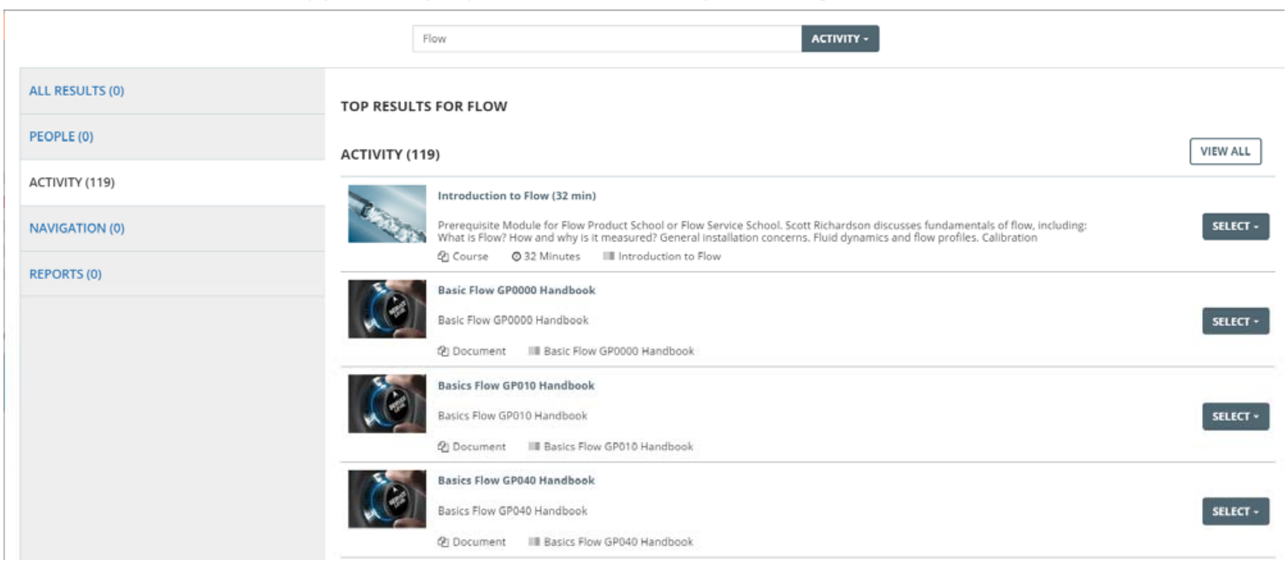


4. Enter your search criteria in the **Search** box.

   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:

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

Register for a Learning Activity

After you locate a learning activity that interests you, click the **Register** button to sign up for the activity. Depending on the type of activity, you may then need to follow the workflow to make additional selections (such as selecting a required number of activities in a curriculum). If the class or activity is already full you will be placed on a waiting list.

Some online activities do not require registration. The **Register** button will not appear for these types of activities.

***Note**: If your company uses E-Commerce or Extended Enterprise, you may need to buy the activity or add it to your Shopping Cart before you can launch or register for it. Refer to the SumTotal Learn E-Commerce and Extended Enterprise User Guide for more.*

Launch Online Learning

When you locate a course, document, or online activity that displays the **Start** icon, you can access it immediately.

1. Locate the activity using Enterprise Search, by looking in the Library, or from your Training Schedule.
2. Click **Start** or **Launch** next to the name of the activity.

If you do not complete this activity in one sitting, you can relaunch the activity by clicking **Start** or **Launch** again.

View Your Training Schedule

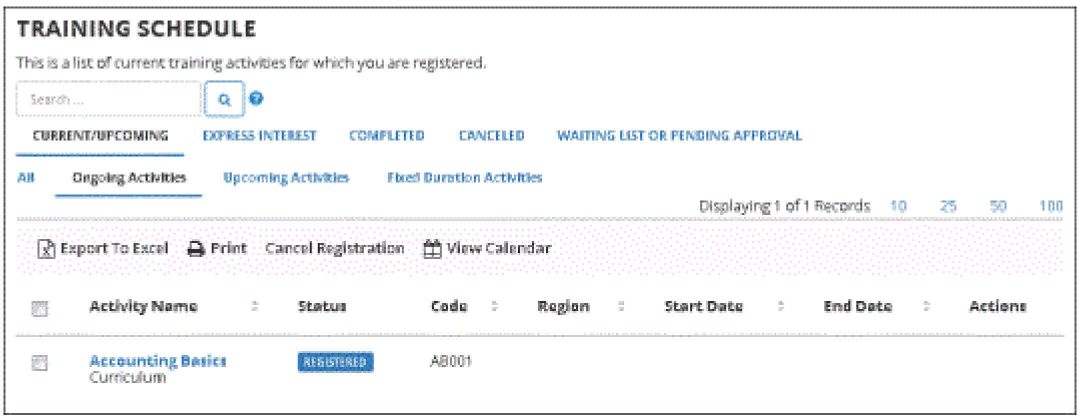
SumTotal makes it easy for you to access the activities and courses you are registered to take. You can choose to view your upcoming scheduled activities, completed activities, or the ones in which you are assigned to the waiting list. On the **Training Schedule** page, you can also search for specific courses or cancel a registration.

- ***To view your Training Schedule:***

1. Navigate to **Learning > Training Schedule**.
2. Click the desired tab to view the type of training you would like to see (such as **Scheduled** or **Completed**).

    A grid displays the names of activities. From this grid you can access information about your progress.

> ***Note:*** *If the* ***Start*** *button appears next to the name of the course, you can open it by clicking this button.*



- ***To cancel your registration for a class or activity:***

1. From the **Training Schedule** page, select the check box next to the activity you wish to cancel.
2. Click **Cancel registration** at the top right corner of the page.
3. Click **Cancel Marked** to confirm your cancelation.

View Your Progress

Once an activity or class is underway, you can check your progress at any time by visiting the **Learning Activity Progress Detail** page. This page displays information such as the content type, your total score, elapsed time, status, launch date, and completion date. If there are lessons associated with the class, the **Lesson** grid displays name, total score, status, and first launch date.

- ***To view information about your progress:***

1. Navigate to **Learning > Training Schedule**.
2. Click the **View progress detail** button to the left of the activity name. The **Learning Activity Progress Detail** page appears.
3. If information is available under the **Lesson** section, click a lesson name to view the status and other details.
4. When you are finished, click **OK** to return to the **Training Schedule** page.

Additional Information

Our online user assistance has detailed information about the tasks you can complete as a learner. Log into your SumTotal site and click the Help icon (?) in the upper-right hand corner to access fully integrated help.

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