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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, your organization provides you with instant access to online learning courses, 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 also learn about performance management tasks, such as taking a competency assessment and creating a development plan. 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>
<thead>
<tr>
<th>Role</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner</td>
<td><img src="image" alt="Learner Icon" /></td>
<td>Provides access to training and learning activities available to you. If you are an instructor, you can also access your <strong>Instructor Schedule</strong> from this <img src="image" alt="Learner Icon" /> menu.</td>
</tr>
<tr>
<td>Manager</td>
<td><img src="image" alt="Manager 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><img src="image" alt="Administrator 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.
# Exploring the SumTotal Interface

The Dashboard displays when you log in to the system.

The Learner Dashboard offers the following options:

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roles</td>
<td>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.</td>
</tr>
<tr>
<td>📚</td>
<td>Use this menu to access user-related activities such as your Profile and Preferences, Development Plan, or Training Schedule.</td>
</tr>
<tr>
<td>🕵️‍♀️</td>
<td>Navigate to the Alerts pane to view and perform actions on pending tasks.</td>
</tr>
<tr>
<td>📜</td>
<td>Access the Library to look for training-related information such as courses, knowledge documents, and so on.</td>
</tr>
<tr>
<td>🔍</td>
<td>Find the training you need quickly by using the Enterprise Search feature.</td>
</tr>
</tbody>
</table>
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.

▸ To establish your preferences:

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.
Search for Items

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 \( \text{Search icon} \) 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 \( \text{Search icon} \).
   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**).
The Search also displays a section called **Recommended Learning** where you can specify your goals and interests to help customize your search results. If you have not already set preferences or wish to change them, refer to Set Recommended Learning Preferences for instructions.

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 cancellation.
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.

Use Development Plans to Map Your Growth

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

- Establish goals and activities for personal development.
- Establish time frames and actions for addressing the goals.
- Track and report progress.

Features of Development Plan

You can create your own individual development plan or use a group plan assigned by your manager using the Development Plans page. Depending on your permissions, some of the features on your Development Plans page may include the items below. Use the SumTotal online Help to learn more about each feature.

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.
Getting Started as a Learner

► **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 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 learner. Click the **Help** link at the top of the page when accessing Learner pages to access topics relevant to the task you are performing.

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