SumTotal

TotalLMS

Getting Started with SumTotal: Learner Mode

Contents

Introduction

TotalLMS is a Web-based application that provides you with the tools necessary for finding training, managing learning, and tracking your professional growth. Through TotalLMS, 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 TotalLMS 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 TotalLMS – just enough to get comfortable navigating and exploring some key features and capabilities.

TotalLMS Overview

Learner mode provides many features. Below is an overview of the feature groups and how you can use them to increase your knowledge and your productivity.

- **Training**: You can access online courses, instructor-led training, seminars, documents and more in one easy-to-use location.
- **Performance Management**: Using SumTotal, you can map skills, competencies, and development plans against your company's business objectives. You can manage your career and growth through alternate job analysis and personal development plans.
- **Collaboration Center**: Using a collaboration center, you can access experts and peers for quick answers to questions or clarification of course material. Expert responses to your questions are automatically captured and stored in a knowledge base, providing an ongoing, searchable source of information for everyone. These expert question and response capabilities make it easier for you to acquire the knowledge you need so that you can get your job done faster.

Logging on to SumTotal

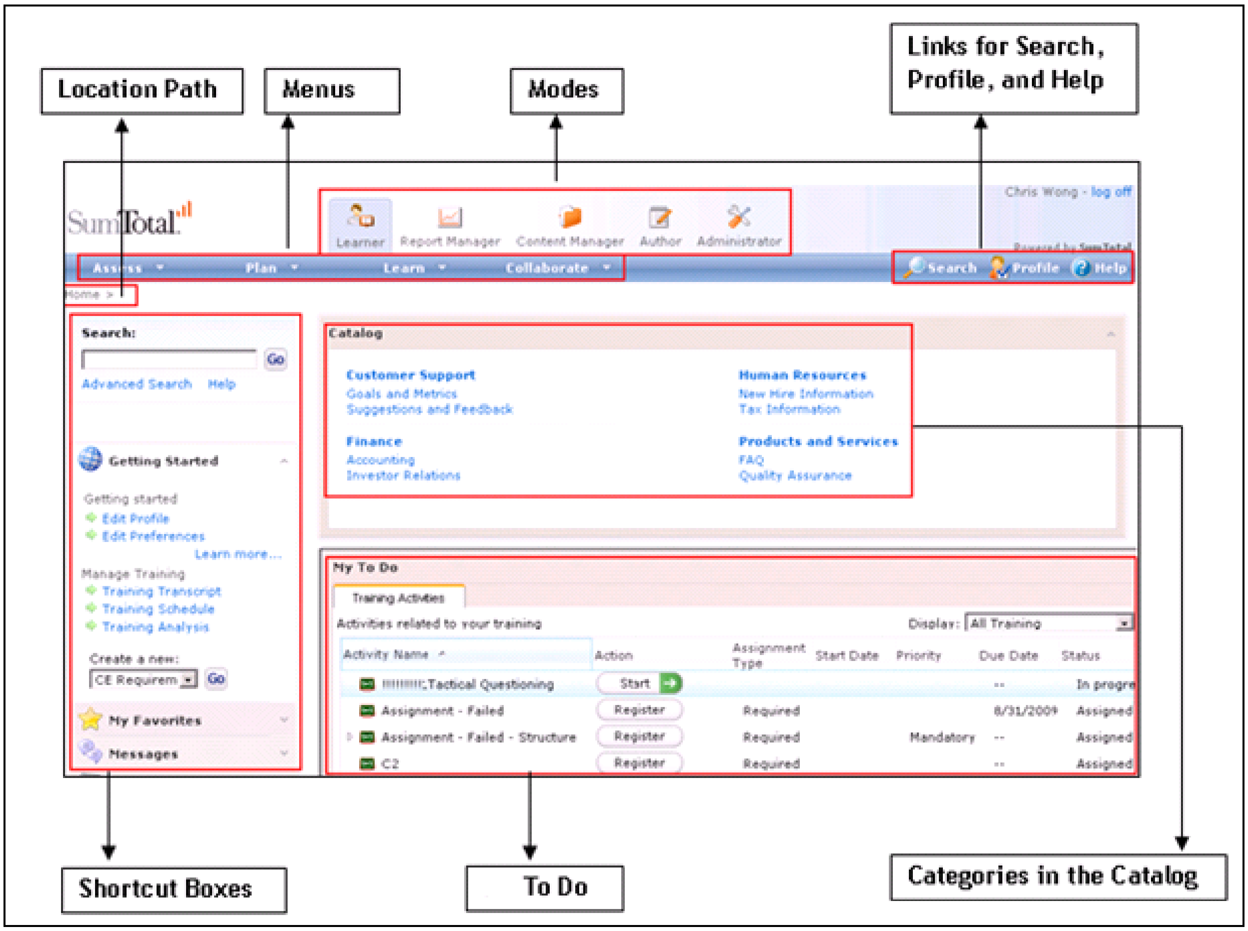
The first time you access the Log On page, you will be prompted to enter the username and password that have been assigned to you.

Log On page

You can change your password after you have successfully logged on to the application. You can reset you password by clicking the *Reset you password* or *Forgot your password* links on the Log On page if you forget your password.

Exploring the SumTotal Interface

After you log on to the application, you will see the Home page.



Home page in Learner mode

The Home page offers the following options:

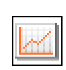
Options	Descriptions
Modes	Navigate to a different mode by clicking the appropriate button. Up to seven modes may be available depending on the permissions granted to you.
Location Path	Use the location path to navigate to other pages quickly. A quick glance at the location path will tell you where you are in TotalLMS.
Learn Menu	Use this menu to access your learning-related activities.
Plan Menu	Use this menu to access your development plan information.
Collaborate	Use this menu to access collaboration centers and communities.
To Do	Navigate to your training and performance related tasks.

Options	Descriptions
Catalog	Access the catalog to look for training related information such as courses, knowledge documents and so on.
Search	Find the training you need quickly by using the SumTotal search feature.
Profile and preferences	Use this option to update your personal profile information. You can also set your preferences such as time zone, regional settings, and home page shortcuts.
Help	Use this option to get online assistance while performing various tasks in the application.

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 application 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 Learner mode.

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

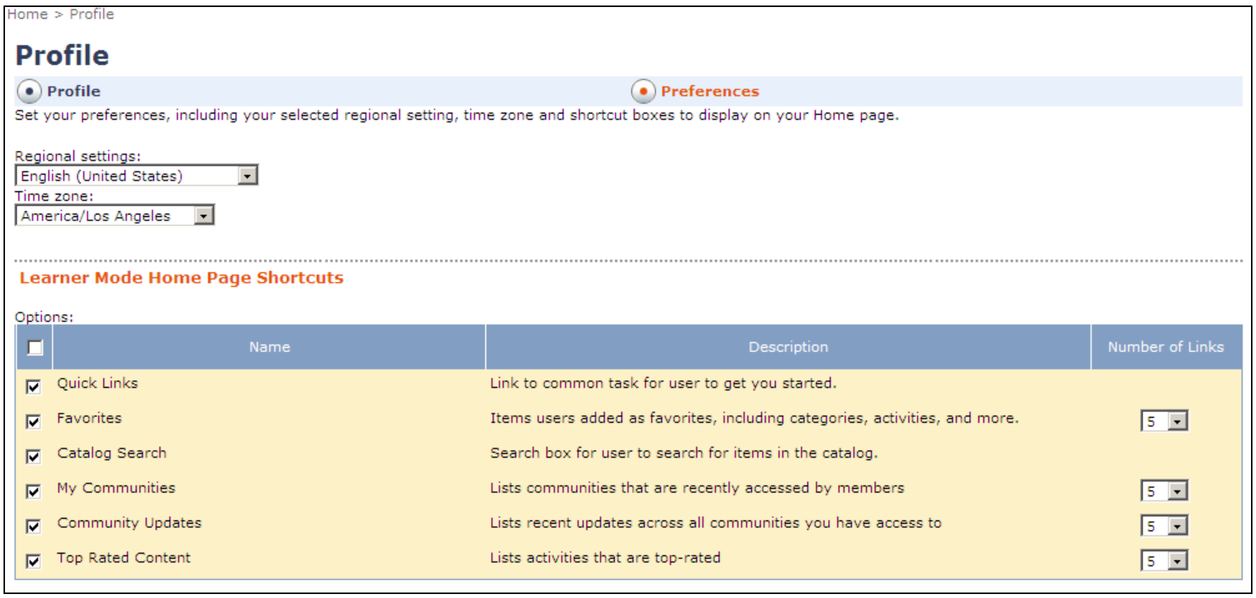
Mode name and Description	Icon
Home mode: Allows users to access features of Enterprise Learning and other SumTotal products from a single location in the form of widgets.	
Learner mode: Provides access to training and learning activities available to you.	
Manager mode: Provides information about training- and performance-related information for users that managers are allowed to view. Reports are available for individuals and workgroups.	
Content Manager mode: Provides management features for online course development.	
Author mode: Provides the features necessary for the development of online courses. Only internal courseware developers have access to these areas.	
Content Reviewer mode: Allows reviewers to evaluate courses for accuracy, effectiveness, and completeness. Reviewers can raise issues for discrepancies they find.	
Administrator mode: 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.	
Report Manager mode: Provides interactive reporting and analysis for measuring the impact of training within an organization.	
TotalPerformance mode: 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.	

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 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.



Options for setting your preferences

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 application will adjust the times for your scheduled training to match the new time zone setting.

Finding the Right Training

On many occasions you will be automatically registered for training. These classes will appear on your Training Schedule. All you have to do is click the name of an activity to review the details. You can also search for documents, classes, and other learning opportunities to satisfy a specific goal or increase your skill set. In SumTotal you have two main ways to access training: by looking in the catalog or by using the search feature.

Using the Catalog to Find Training

On your SumTotal Home page, you may see categories that contain courses and classes that are available to your organization from the SumTotal database. You can also access the items in the catalog by selecting the **Learn** menu and clicking **Catalog**.

Example of a category in the catalog

Using Advanced Search

Sometimes you may want to locate items by a certain set of criteria, such as by location or delivery method.

▶ **To use the Advanced Search feature:**

1. Click the **Advanced search** link below the **Search** text box.
2. Select or enter your search criteria.
3. [Optional] Select **Clear all** (for individual filters) or **Reset all** (for all filters).
4. Click **Go**.
5. Locate the item you want.
6. [Optional] View a consolidated list of relevant categories, locations, and activity types appropriate to your search criteria in by clicking relevant links in the left panel.

Registering for a Learning Activity

After you locate a learning activity that interests you, click the **Register** button to sign up for the activity. 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.

Launching Online Learning

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

► **To launch online learning:**

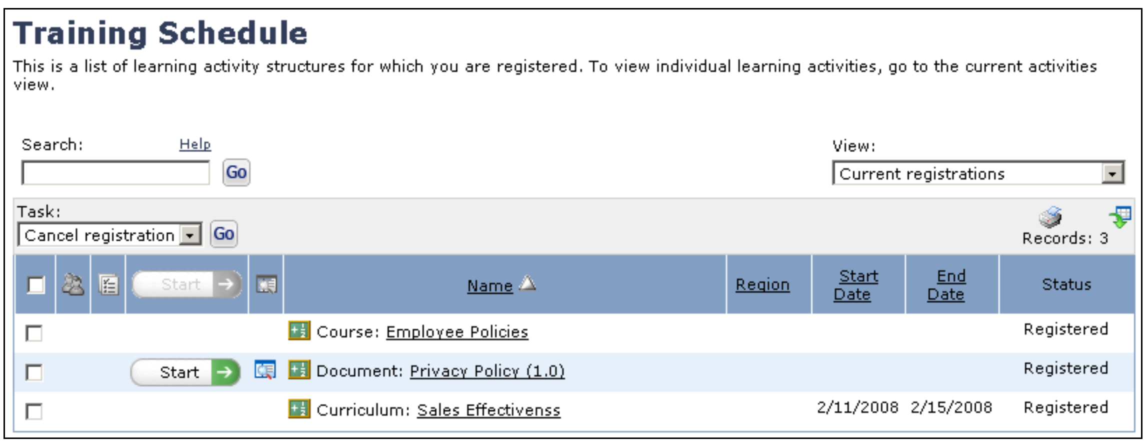
1. Locate an activity by using the Search feature or by looking in the catalog.
2. Next to the name of the activity you want, click **Start**.

Viewing 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. From the **Learn** menu, click **Training Schedule**.
2. In the View list, select 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.
3. If the **Launch** button appears next to the name of the course, you can open it by clicking this button.



Training Schedule page

► **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. In the Task list, select **Cancel registration**.
3. Click **GO**.
4. Click **Cancel Marked** to confirm your cancellation.

Viewing 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. From the **Learn** menu, click **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.

Using SumTotal for Competency Assessments

Competency assessments contain questions developed by someone in your company. 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)

► **To access the assessments assigned to you:**

1. From the **Assess** menu, click **Competency Assessments**.
2. Use the View list to select the type of assessments you want to view. Select Pending Assessments to view assessments you need to complete for yourself (where you are rating your own abilities) as well as the ones you need to complete to evaluate other employees.

Note: Assessments you have completed and submitted will not be available to you until the completion period is over. Once the assessment is closed, you will be able to access your completed assessments by selecting Completed Assessments in the View list.

► **To launch a competency assessment:**

1. Select the assessment you want to launch.
2. Click **Start** next to the assessment.

You can complete an assessment that has been assigned to you by filling out each item in the assessment. The items in an assessment are grouped as competencies, individual skills, and survey questions. You may answer items in a linear fashion or in any order by clicking on the item name. You can also choose to comment about an item or decline any item. Your progress will be noted in the sidebar.

► **To complete a competency assessment:**

1. For each question select the appropriate option button to indicate your response.
2. If desired, enter comments in the **Comment** text area.
3. To clear your selection and comments, click **Clear**.
4. Click **Next** to move to the next question.
5. Enter general comments, if applicable
6. When you are done, click **Finish** on the bottom menu.
7. Click **Submit**.

Using 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 timeframes 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.
- *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 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

Additional Information

Online help has more information about tasks you can complete in Learner mode. Click the Help link at the top of the page in Learner mode to access topics relevant to the task you are performing.