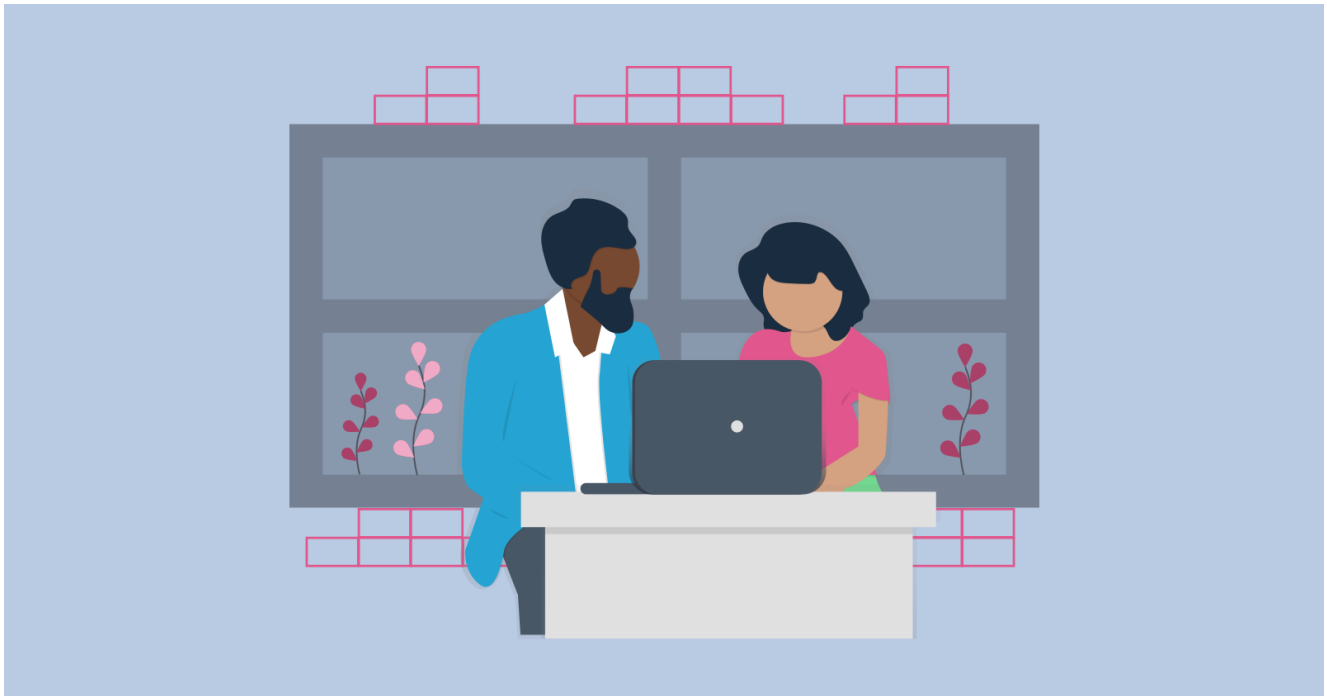


# ALAMEDA COUNTY TRAINING & EDUCATION CENTER



## Learning Management System Supervisor's Guide



ALAMEDA COUNTY TRAINING & EDUCATION CENTER  
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# Introduction

## How to Use This Manual

This manual has been created to give you the best ways to take advantage of the Training & Education Center's Learning Management System (LMS) using the SumTotal Learning Management platform. There are various ways we envision you using this guide; however, our intention is to create a simple and user-friendly process.

## Change Can Be Hard

Excited, concerned, skeptical? Do any of these describe your feelings now that the County has implemented the SumTotal platform? This Guide will build your confidence and allow you to take advantage of the processes and tools available in our LMS. Also, this Guide will push further into using key differentiators of Learning Management to increase your automation, maximize usability for staff, customers and partners, ultimately increasing your productivity and maximizing your personal development.

Read on and find out how to take advantage of basic processes of this LMS: registration, launching, tracking, and reporting, to increase your engagement and growth.

## Customer Support

If you need additional help, please contact the Training & Education Center at [aclearningcenter@acgov.org](mailto:aclearningcenter@acgov.org) or visit us online at [trainingcenter.acgov.org](http://trainingcenter.acgov.org) for County-wide sessions/offerings. For questions regarding departmental offerings, please contact your departmental training representative. If you're not sure who that is, contact us for assistance.

## Suggestions and Feedback

We value your feedback on our performance support materials. Please forward any comments on this manual to the [aclearningcenter@acgov.org](mailto:aclearningcenter@acgov.org).

## Getting Started with the Learning Management System

### Logging on to ALCO SumTotal


Type in your web-browser [alameda.sumtotal.host](http://alameda.sumtotal.host) to get started.

### Alameda County Employees

The first time you access the **Sign In** page, you will be prompted to select the **Manual Login** or **Network ID Login**. Alameda County employees should select **Network ID Login** which is the ability to use your computer's username and password to automatically log into the SumTotal LMS System. Check the **Remember my selection** to bypass this page in the future. If the automatic log-in does not work, please select the **Manual Log-in** and enter the username default password below.

Username: County work email address  
Default Password: Employee ID Number

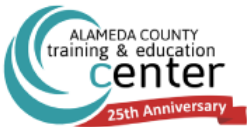
The site you are trying to access requires you to sign in.  
Select your provider to login.



**MANUAL LOGIN**

**NETWORK ID LOGIN**

☐ Remember my selection



**20.1.5.3**

**SIGN IN**

PLEASE ENTER YOUR USERNAME AND PASSWORD.

Username

Password

**SIGN IN**

Don't have an account?  
[Create Your Own Account](#)

[Forgot your password?](#)

After the first time you sign-in, you will be prompted to read and sign an acknowledgement. You will need to type in your name where it states, "Please sign here..." and then hit the **I AGREE** button.

**ALAMEDA COUNTY ACCESS TO ONLINE LEARNING CONTENT**

ALCO SumTotal LMS is an online learning resource system available to you to build your individual strengths, supplement training, and provide professional and personal development. Some Agencies/Departments may assign specific courses to help build job skills. If a course is required by your Agency/Department for your job position, or if your supervisor has specifically assigned you to take a course, you must take and complete the course during your normal working hours at times convenient for your organization and only if approved in advance by your supervisor before you access or take a course.

You also may want to take a course for your personal growth that is not required for your job, nor required or assigned by your supervisor. These non-required or unassigned courses are referred to as elective courses, and should be accessed only on your own time and only outside of your normal working hours. Accessing or taking courses

Please sign here...

**I DISAGREE** **I AGREE**

## Alameda County Employees (reset your Network ID Login email address)

For Alameda County Employees, if your Network ID Login, which is the ability to use your computer's username and password to automatically log into the SumTotal LMS System, does not work, you will need to update your email information on the Alameda County System (HRMS). **PLEASE NOTE THAT ANY UPDATES TO YOUR EMAIL WILL TAKE UP TO 24 HOURS TO PROCESS.**

Update Email in HRMS:



To update email in HRMS type in [http://alcoweb/main\\_app/entry.jsp](http://alcoweb/main_app/entry.jsp) into your browser.

The screenshot shows the @coweb website homepage. At the top is a search bar labeled "Search ALCOWEB" with a "GO" button. Below the search bar is a navigation menu with links: "For You", "For Work", "Go Green", "About the County", and "Contact Us". The main content area is divided into several sections. On the left, there is a "News & Events" section featuring a "ConnectAC" logo and a "Coronavirus COVID-19" banner. The central section contains "For You" (with links to compensation, leave, and training), "For Work" (with a link to ALCOLINK), "About The County" (with links to demographics and maps), and a "Telephone Directory" with search fields for last name, first name, and department/keyword. On the right, there is a "Quick Links" section with a "Set Profile" link. At the bottom, there is a "Documents TEST / Forms" section with a search field and a "New Document Center" link.

Select **For You / Self Service / HR & Payroll**.

This screenshot shows the @coweb website with the "Self Service" menu expanded. The menu includes links for "Training", "Compensation & Benefits", "Retirement", "Programs", "Employment", and "Commuting". The "HR & Payroll" link is highlighted. The rest of the page content, including the navigation menu and the "For You", "For Work", "About The County", "Telephone Directory", and "Quick Links" sections, remains visible in the background.

This will take you to the **Alcolink HRMS** login page.

### System Availability

System is available 24 X 7

**EXCEPTIONS**

SUNDAYS	6:00 AM - 10:00 AM
PAYWEEK MONDAYS*	5:30 PM - 10:00 PM
WEDNESDAYS	7:00 PM - 11:00 PM

Note: \*If Payweek Monday falls on a holiday, the system will not be available on Payweek Tuesday between 5:30 PM and 10:00 PM.

### HRMS Login

User ID

Password

[Forgot/Reset Password?](#)

### Information

For any ALCOLINK HRMS issues:  
Contact ITD Help Desk at 510-383-5000 (x35000) or via email [support@acgov.org](mailto:support@acgov.org)

For Employee Benefits information:  
[Alameda County Employee Benefits Center](#)

Log in using your County credentials. You will have access during the system availability schedule.

### System Availability

System is available 24 X 7


**EXCEPTIONS**

SUNDAYS	6:00 AM - 10:00 AM
PAYWEEK MONDAYS*	5:30 PM - 10:00 PM
WEDNESDAYS	7:00 PM - 11:00 PM


Note: \*If Payweek Monday falls on a holiday, the system will not be available on Payweek Tuesday between 5:30 PM and 10:00 PM.

Select the **Work Email** icon.


Employee Self Service



Timesheet




Benefits




Payroll

Last Pay Date 06/12/2020




Total Rewards

Total Rewards 2019




Work Email

Claudio.Lane@acgov.org



Change My Password



Help Resources

Select your name and update your email information and click on **Save**.

Email ID	Email Type	Primary Email
Claudio.Lane@jacgov.org	Business	✓

Cancel
Email Address
Save

Email Type: Business  
Email Address:

You have now updated your email in the HRMS system.

## Non-County Users

Click here - [Non-County Employees Log In](#)

Select **Create Your Account** and fill in your Contact and Optional information. Create a username and password. After your profile has been created **please allow 24 hours before you can access the site.**

When creating a user account, please make sure to enter all the information that is marked with an \*. It is recommended you set your Login Name to your email address. In the employee ID field please do not delete the prefix. Only add the 3 digits after the prefix “EX – “ to create your employee ID number.

ACCOUNT DETAILS  
ENTER YOUR EMAIL ADDRESS AS YOUR LOGIN NAME AND CREATE A PASSWORD.

Login Name \*
Password \*

PLEASE ENTER 3 DIGITS FOR THE SYSTEM TO CREATE AN ID FOR YOUR PROFILE.







Employee ID \*

## Navigating the Home Page

After you log in, your dashboard should resemble the following:




From here, you can:

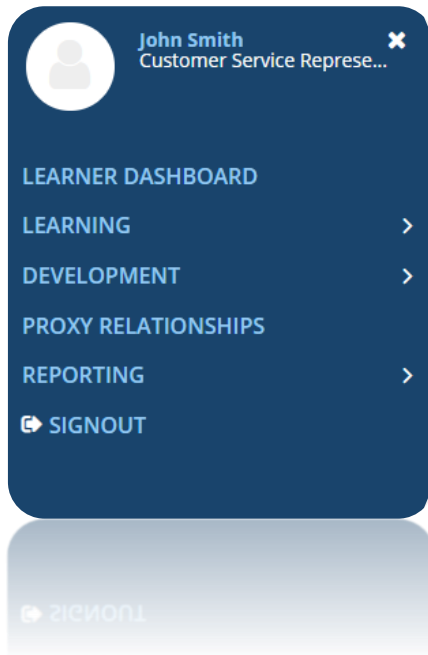
	<ul style="list-style-type: none"> <li>View your <b>Timeline</b> to see what tasks you need to accomplish, including assigned trainings.</li> </ul>
	<ul style="list-style-type: none"> <li>Use <b>Enterprise Search</b> to keyword search information including Live Instructor Led Trainings, Online Courses, learning activities, virtual sessions or menu items.</li> </ul>
	<ul style="list-style-type: none"> <li>Access the <b>Library</b> to browse for training.</li> </ul>
	<ul style="list-style-type: none"> <li>Use the <b>Self</b> (icon) to navigate to a variety of pages that allow you to update your account information, access your Training Schedule, Transcripts, track your assigned training, manage development plans, and much more.</li> </ul>
	<ul style="list-style-type: none"> <li>Use the <b>My Team</b> icon to access and approve trainings for your employees.</li> </ul>
	<ul style="list-style-type: none"> <li>Not sure where to begin? Click the <b>Self</b> icon to begin a guided walkthrough.</li> </ul>



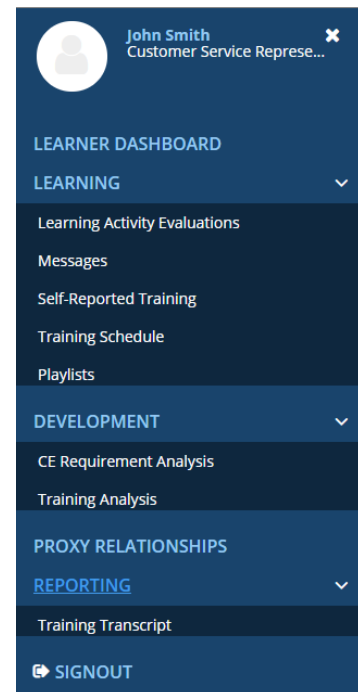
## Understanding User Roles and Menus

Depending on your role, any departmental settings, and personalization, you may access different pages that appear under different menus.

For example, if you click the self icon , a menu like the following displays on the left-hand side of the page:



Click the sub-menus to expand the category and view a list of additional available pages. For example: See screenshot to the right for expanded categories.



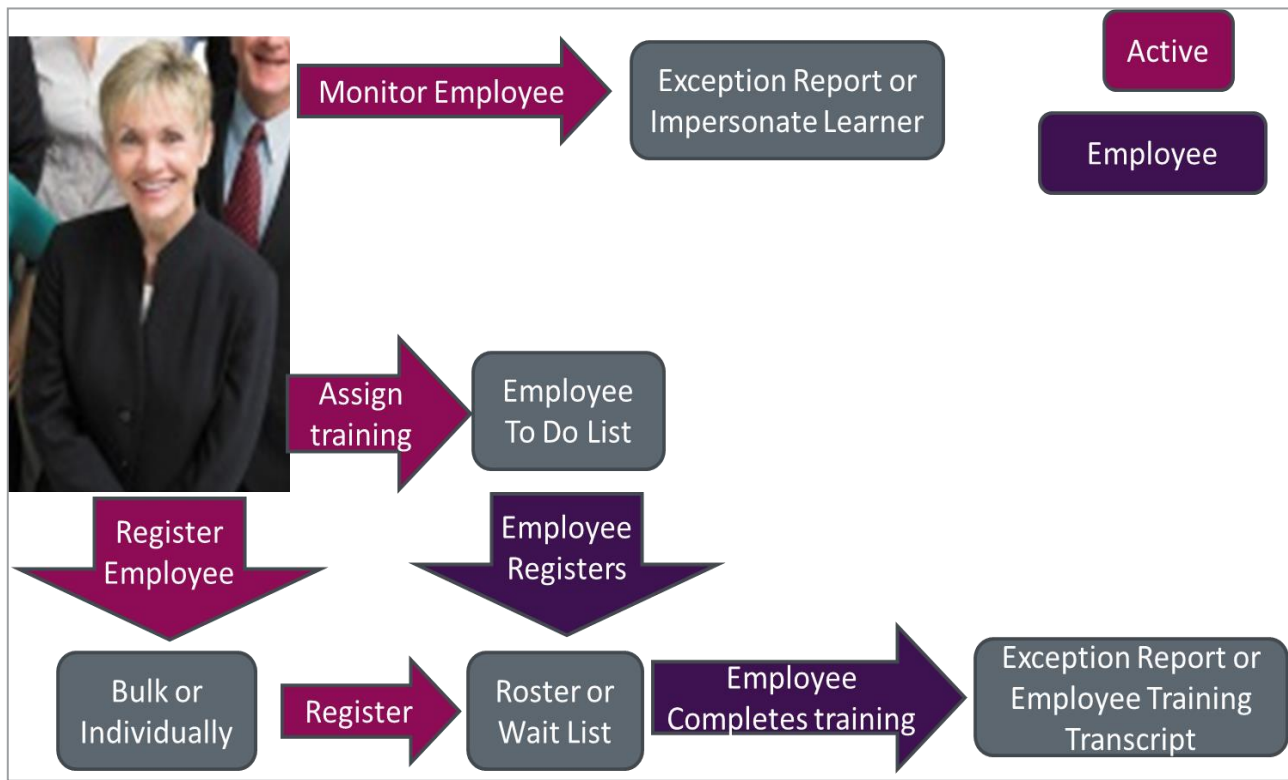
You can access some of your sub-menus from the icons located at the bottom area of your dashboard home page.

## Working as a Manager

### In This Chapter

- **Manager Overview**
- **Register Employees for Training**
- **Explore the Manager Dashboard**
- **Assign Training to Employees**
- **Monitor Team Goals**

## Manager Overview



## Your Employees + Training = Learning + Skills

The basic workflows for the system revolve around you monitoring your employee's progress or actively assigning or registering your direct reports for the training they need. This results in the ultimate purpose of ALCO's LMS. You may assign training to your employees and allow them to choose when to complete it, or register your employees, placing them directly on the roster for a specific training. As a manager, your ultimate focus is making sure your employees complete their assigned training.

Learning activities are any training opportunity available to you in the ALCO LMS. These can be any digital document or e-learning module that you can download and complete at your leisure; it could be a webinar scheduled by a trainer, an instructor-led course held at the Training & Education Center, or an on-the-job training class run by your department. You will be able to monitor your employees' completion of these learning activities.

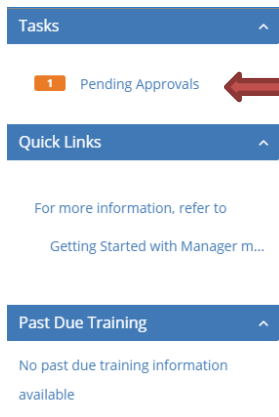
## Approving Employees for Training

There are a couple of ways of approving or denying pending registration requests. One way is through the **Manager Dashboard** and the other way is through the **Learner Approval** link.

## Manage Pending Requests

1. Select **My Team**  icon. Navigate to the **Manager Dashboard**.

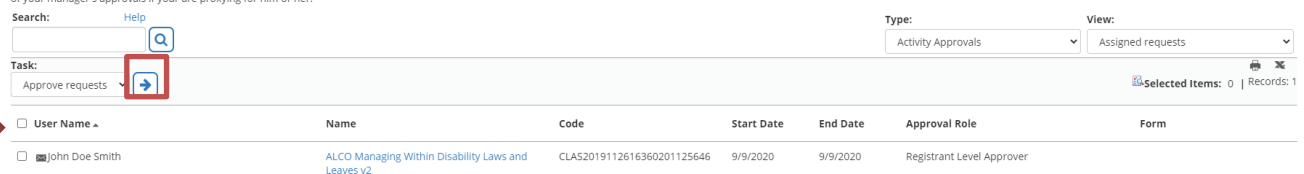
Under **Task** select **Pending Approvals**.



2. The **Learner Approvals** page will appear, and a list of pending registrations will display. Select the checkbox near the name of each registration. Note, you may select more than one entry in the list, or you may select all registrations by checking the checkbox near the **Username**, which will select all. The default task is **Approve requests**. Select the arrow icon next to the **Approve requests**. To reject a registration, prior to selecting the arrow, change the Approve request default to **Reject request** (you must pre-select the registrations in which you will reject).

### LEARNER APPROVALS

This is a list of pending registration approvals. Use the View list to see your assigned approvals, approvals assigned to others, and those without any assigned approver. You may be able to approve requests not specifically assigned to you. You will also be able to see a list of your manager's approvals if you are proxying for him or her.



<input type="checkbox"/> User Name	Name	Code	Start Date	End Date	Approval Role	Form
<input type="checkbox"/> John Doe Smith	ALCO Managing Within Disability Laws and Leaves v2	CLAS2019112616360201125646	9/9/2020	9/9/2020	Registrant Level Approver	

3. The **Approve or Reject Requests** page will appear. Select the **OK** button to complete the approval. Note entry is optional. The system will route you to your **Learner Dashboard**. To return to the home page, simply select the Training & Education Center logo.

### APPROVE REQUESTS

#### APPROVAL FOR JOHN DOE SMITH (EX0002)

Approval Role:  
Registrant Level Approver

Activity Name:  
ALCO Managing Within Disability Laws and Leaves v2


Start Date:  
9/9/2020

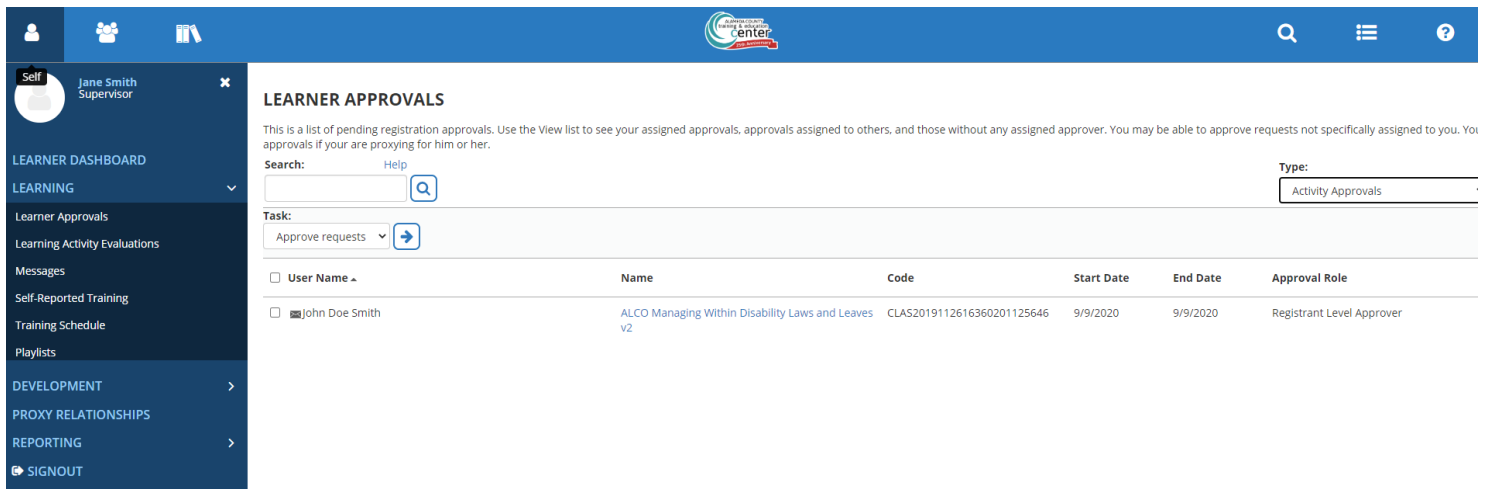
End Date:  
9/9/2020

Note:

OK


CANCEL

4. To access the **Learner Approvals** page through the Learner route, select the Learner (Self) icon. 
- Expand the Learning toolbar, then select the **Learning Approvals** link. The **Learner Approvals** page will appear. A list of pending registrations displays. Select the checkbox near the name of each registration. Note, you may select more than one entry in the list, or you may select all registrations by checking the checkbox near the **Username** which will select all. The default task is **Approve requests**. Select the arrow icon next to the **Approve requests**. To reject a registration, prior to selecting the arrow, change the **Approve request** default to **Reject request** (you must pre-select the registrations in which you will reject).




**LEARNER APPROVALS**

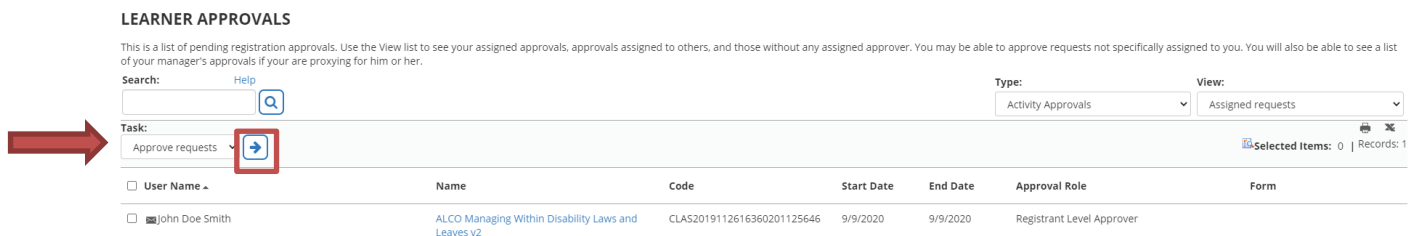
This is a list of pending registration approvals. Use the View list to see your assigned approvals, approvals assigned to others, and those without any assigned approver. You may be able to approve requests not specifically assigned to you. You approvals if you are proxying for him or her.

Search:  [Help](#) 

Type:


Task:  

<input type="checkbox"/> User Name	Name	Code	Start Date	End Date	Approval Role
<input type="checkbox"/> John Doe Smith	ALCO Managing Within Disability Laws and Leaves v2	CLAS2019112616360201125646	9/9/2020	9/9/2020	Registrant Level Approver





**LEARNER APPROVALS**

This is a list of pending registration approvals. Use the View list to see your assigned approvals, approvals assigned to others, and those without any assigned approver. You may be able to approve requests not specifically assigned to you. You will also be able to see a list of your manager's approvals if you are proxying for him or her.

Search:  [Help](#) 

Type:  View:

Task:  

 Selected Items: 0 | Records: 1

<input type="checkbox"/> User Name	Name	Code	Start Date	End Date	Approval Role	Form
<input type="checkbox"/> John Doe Smith	ALCO Managing Within Disability Laws and Leaves v2	CLAS2019112616360201125646	9/9/2020	9/9/2020	Registrant Level Approver	

5. The **Approve or Reject Requests** page will appear. Select the **OK** button to complete the approval. Note entry is optional. The system will route you to your **Learner Dashboard**. To return to the home page, simply select the Training & Education Center logo.

#### APPROVE REQUESTS

##### APPROVAL FOR JOHN DOE SMITH (EX0002)

Approval Role:  
Registrant Level Approver

Activity Name:  
ALCO Managing Within Disability Laws and Leaves v2

Start Date:  
9/9/2020

End Date:  
9/9/2020

Note:

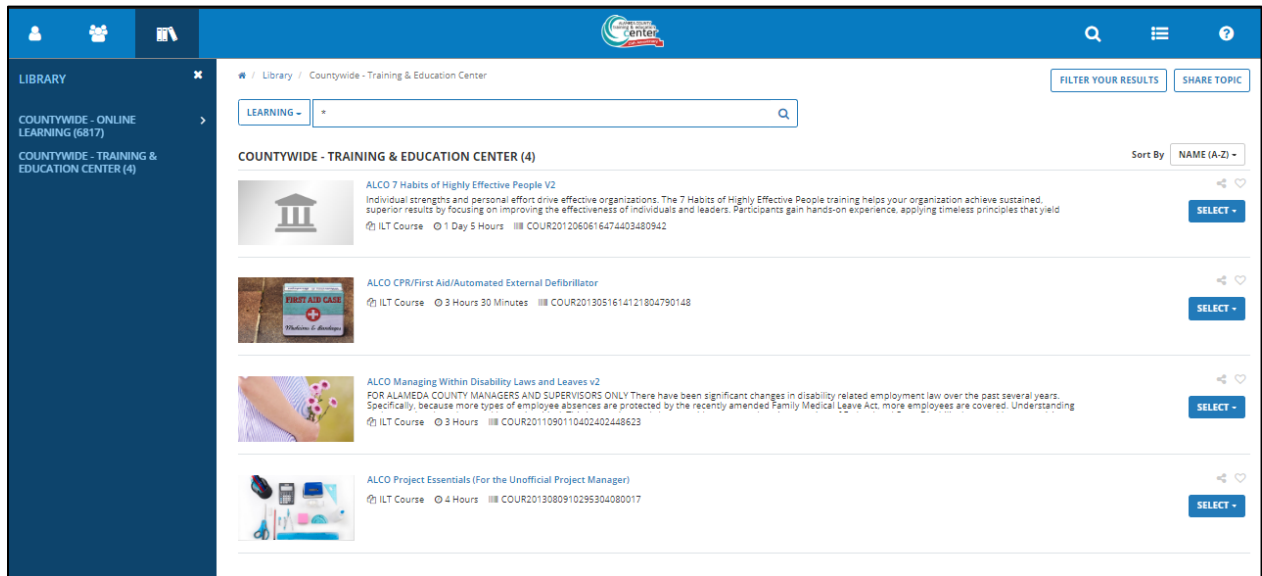


## Registering Employees for Training

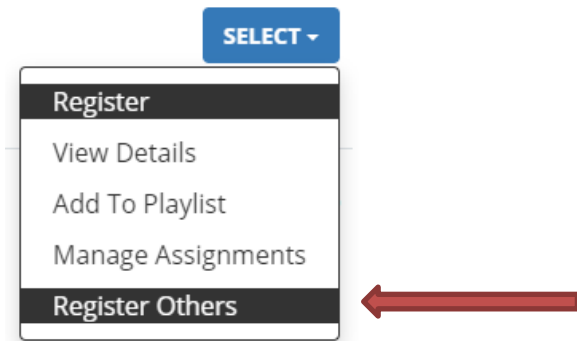
You can register your employee individually or use batch registration to register multiple employees at a time. Similarly, you can cancel the registrations individually or for multiple employees.

### Registering Employees for Training

1. Navigate to Enterprise Search  or the Library .



2. Find the desired learning activity.
3. From the **SELECT** (located to the far right of the activity) drop down, select **Register Others**.



4. Select **Time/Date** then, Click **Continue**. The **Select Users** section becomes available (you may have to scroll down to see this section).

- By default, the system checks for issues when you register others. For example, you cannot add users to the Registration or Waiting list panel if they have a schedule conflict. Select **Skip checking of registration issues** to bypass registration checks if it appears. Selecting this checkbox means the system overrides any issues and registers the user anyway.

- Under **Available Users** click **Add**.

- On the **Select Users** page, choose how you want to find the users to register for the activity (we recommend **Select viewable users**). Click **Next**.

- Select the users you wish to assign to this activity by selecting the checkbox near their name. This list varies depending on what you chose on the **Select Users** page.

- Selected users now appear on the **Available Users** list.

- Select the arrow icon to **Register** the **Available Users** to either the **Registration** or **Waiting List**. If there are any **Warning issues**, select the link to view them and determine how you wish to proceed.

**AVAILABLE USERS**

Available seats: 0  
Selected users: 0  
Available users: 62  
Users not in allocation: 0

Add Select All Clear All

Records: 1-10 of 62  
Page: 1 of 7  
Go To Page:

Name	Status
<input type="checkbox"/> Emily A Arroyo	No issues
<input type="checkbox"/> Roxannes M Bakalar	No issues
<input type="checkbox"/> Robin Banks	No issues
<input type="checkbox"/> Tim O Berger	No issues
<input type="checkbox"/> Franklin J Bowden	No issues
<input type="checkbox"/> Josara G Chavez	Warning issues
<input type="checkbox"/> Mark D Conway	No issues
<input type="checkbox"/> Fergus H Cooper	No issues
<input type="checkbox"/> Andy Denys	No issues
<input type="checkbox"/> Leslie M Frye	Warning issues

**REGISTRATION**

Records: 5  
Available seats: Unlimited  
Users pending approval: 0

Remove All

Name

Rich Banker	X
Tim W Birney	X
Rocco Bodine	X
Rosalie I Bolender	X
Calvin F Bystrickey	X

**WAITING LIST**

Records: 0

Remove All

Name

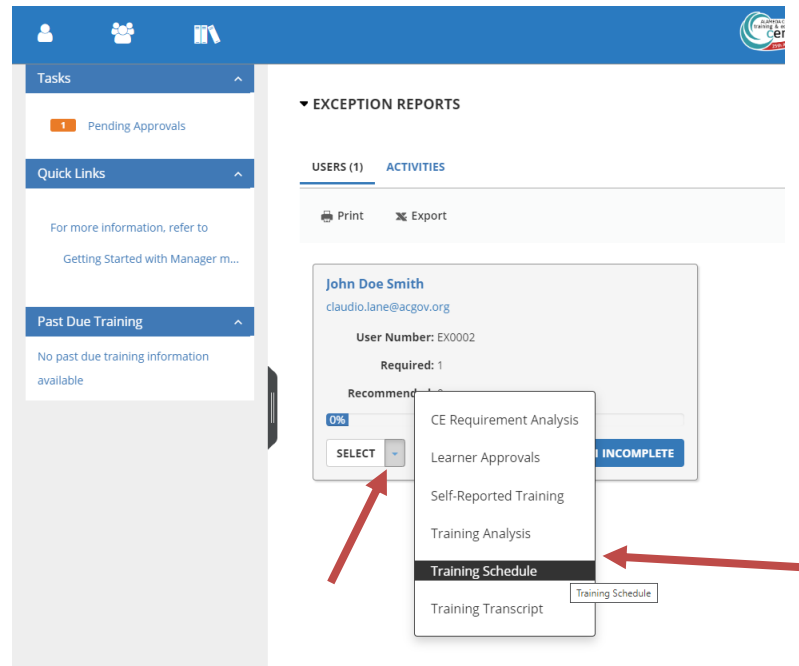
11. Click **Submit**. After clicking the **Submit** button, you will be redirected to your Learner Dashboard. You will receive a Notice of Enrollment via e-mail to confirm the registration.

CANCEL SUBMIT RESET

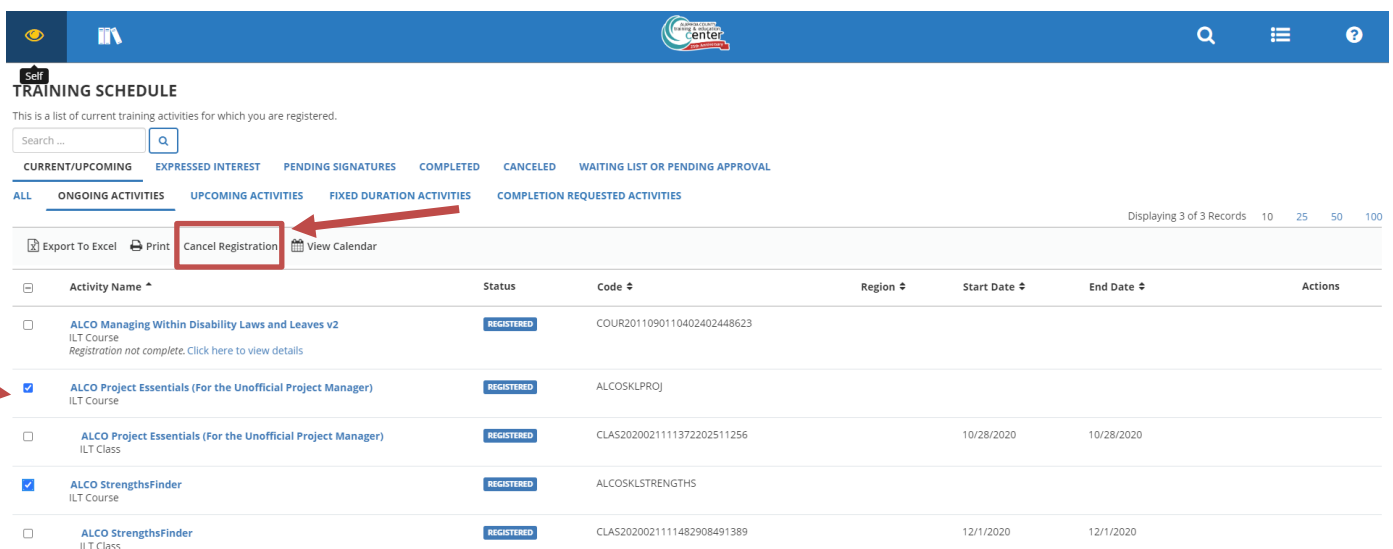
12. For classes with a cost, an additional step is required to register the employee. Select the **Pay Now** button, which is approving the cost of the learning activity. Cost will be processed after the employee attends the learning activity. Some departments/agencies may require a secondary approver by a Departmental Cost Approver to complete registration.

## Cancelling User Registration

Supervisors can cancel registrations individually by navigating to the **Manager Dashboard > Select** the User (Employee), select **Training Schedule**.

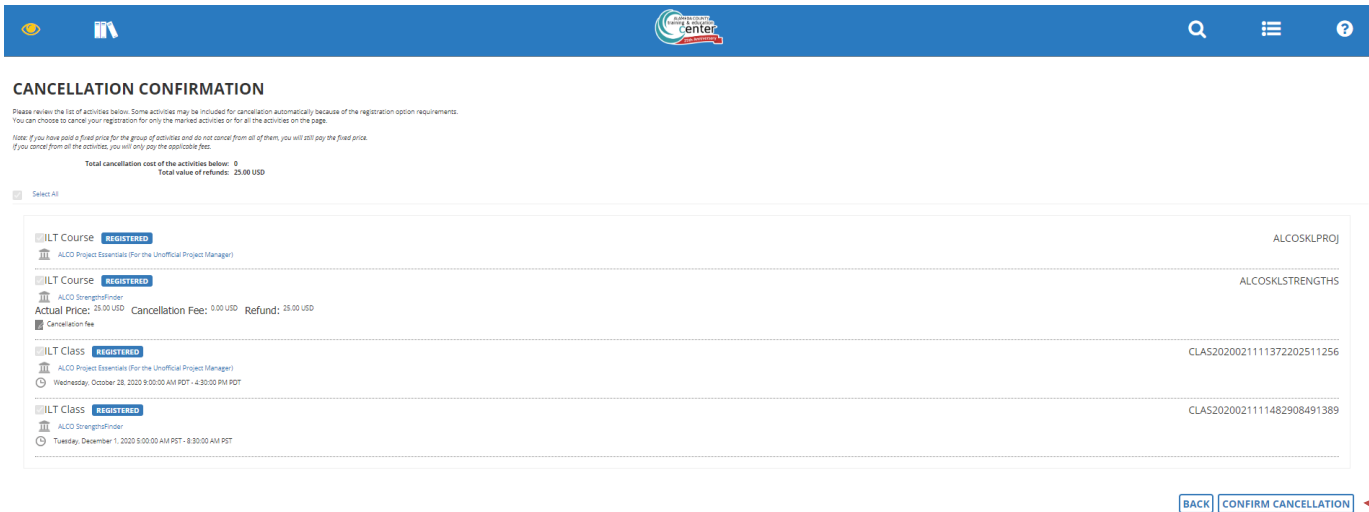


Once selected, this will launch emulation which is the ability to view as if you are the employee. The employee's **Training Schedule** will appear. Select the activity you wish to cancel by checking the checkmark next to the registration. You may cancel more than one activity at a time. Then select, **Cancel Registration**.





The **Cancellation Confirmation** page will appear. Review details and select the **Select All** checkbox. Finally, select the **Confirm Cancellation** button.



**CANCELLATION CONFIRMATION**

Please review the list of activities below. Some activities may be included for cancellation automatically because of the registration option requirements. You can choose to cancel your registration for only the marked activities or for all the activities on the page.


Note: If you have paid a fixed price for the group of activities and do not cancel from all of them, you will still pay the fixed price. If you cancel from all the activities, you will only pay the applicable fees.

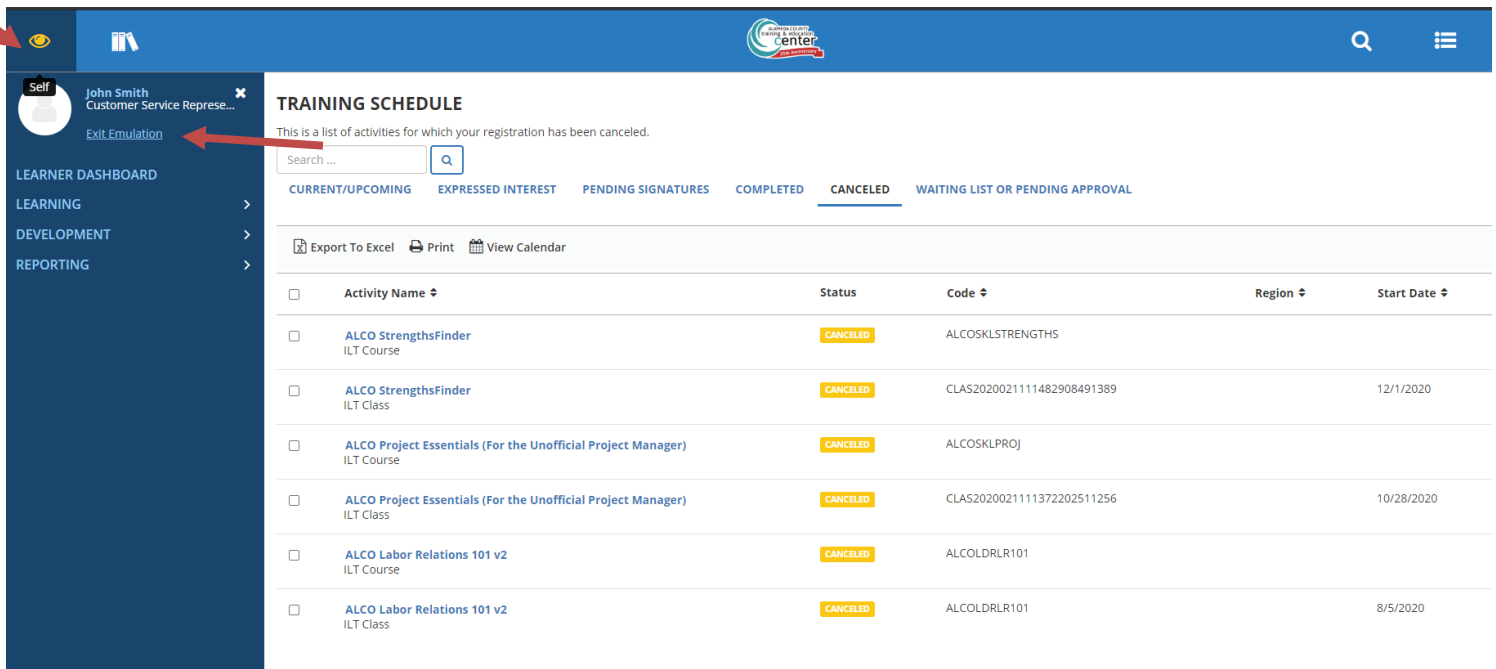
Total cancellation cost of the activities below: 0  
Total value of refunds: 25.00 USD

☐ Select All

ILT Course <b>REGISTERED</b> ALCO Project Essentials (For the Unofficial Project Manager)	ALCOSKLPROJ
ILT Course <b>REGISTERED</b> ALCO StrengthsFinder Actual Price: 25.00 USD Cancellation Fee: 0.00 USD Refund: 25.00 USD Cancellation fee	ALCOSKLSTRENGTHS
ILT Class <b>REGISTERED</b> ALCO Project Essentials (For the Unofficial Project Manager) Wednesday, October 28, 2020 9:00:00 AM PDT - 4:30:00 PM PDT	CLAS2020021111372202511256
ILT Class <b>REGISTERED</b> ALCO StrengthsFinder Tuesday, December 1, 2020 5:00:00 AM PST - 8:30:00 AM PST	CLAS2020021111482908491389

[BACK](#) [CONFIRM CANCELLATION](#)

To verify the cancellation, select the **Canceled** link. The cancelled registrations should appear. To exit out of the employee's profile view, select the yellow eye icon  then select the **Exit Emulation** link. This will end the emulation mode and return you to your own profile.



**TRAINING SCHEDULE**

This is a list of activities for which your registration has been canceled.

Search ...


[CURRENT/UPCOMING](#) [EXPRESSED INTEREST](#) [PENDING SIGNATURES](#) [COMPLETED](#) [CANCELED](#) [WAITING LIST OR PENDING APPROVAL](#)

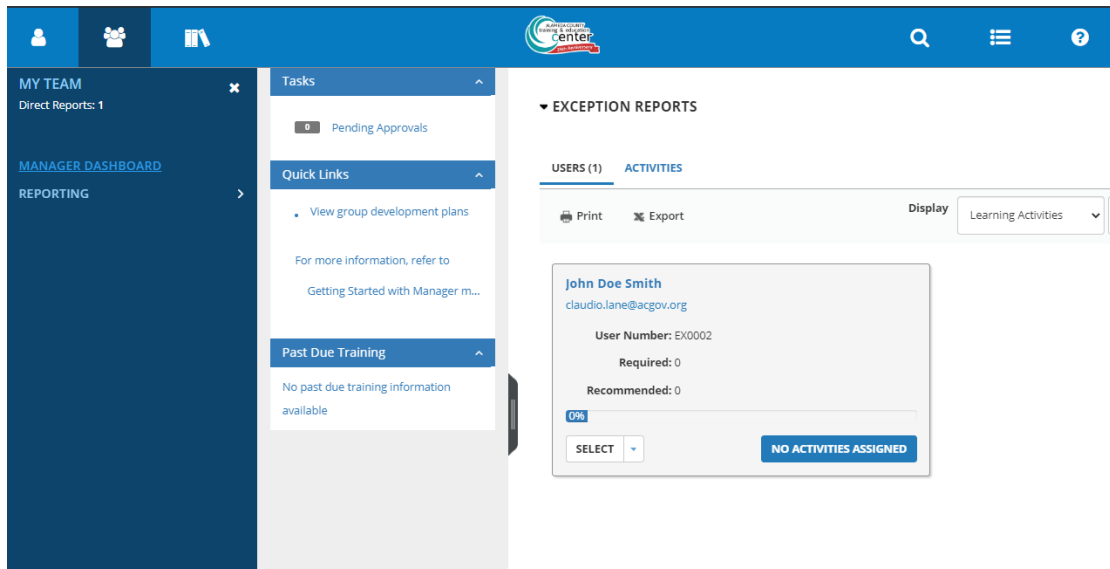
[Export To Excel](#) [Print](#) [View Calendar](#)

<input type="checkbox"/>	Activity Name	Status	Code	Region	Start Date
<input type="checkbox"/>	ALCO StrengthsFinder ILT Course	CANCELED	ALCOSKLSTRENGTHS		
<input type="checkbox"/>	ALCO StrengthsFinder ILT Class	CANCELED	CLAS2020021111482908491389		12/1/2020
<input type="checkbox"/>	ALCO Project Essentials (For the Unofficial Project Manager) ILT Course	CANCELED	ALCOSKLPROJ		
<input type="checkbox"/>	ALCO Project Essentials (For the Unofficial Project Manager) ILT Class	CANCELED	CLAS2020021111372202511256		10/28/2020
<input type="checkbox"/>	ALCO Labor Relations 101 v2 ILT Course	CANCELED	ALCOLDRLR101		
<input type="checkbox"/>	ALCO Labor Relations 101 v2 ILT Class	CANCELED	ALCOLDRLR101		8/5/2020

## Explore the Manager Dashboard

The **Manager Dashboard (My Team)** is the most important page for a manager. From here, you can view, track, and update your direct reports and managed users and their training.

1. In the Header menu, click .
2. Navigate to the **Manager Dashboard**.



You can view the following details on your Manager Dashboard:

- **Left Panel:**
  - ❖ **Quick Links:** contains links to common Manager functions
  - ❖ **Past Due Training:** contains link to see past due trainings for direct reports
- **Right Panel:**
  - ❖ **News:** Displays news from your department or primary organization.
  - ❖ **Exception Report:** Provides information on the overall progress of a user's complete and incomplete assigned activities.

## Assign Training to Employees

If you manage or are assigned to at least one viewable user, you have access to the Manager menus and functions.

### View Exception Reports

You can view your learner's activities from the [Manager Dashboard](#). The Exception Report section displays the user's completion progress in terms of percent complete. You can quickly look at the progress of your direct reports at any point in time. You can also register users for learning activities.

## View Your Learners' Assigned Training from the Manager Dashboard

The **Exception Report** section of the [Manager Dashboard](#) lets you track and manage your direct reports and other managed users and their training. You can use this section to see their complete and incomplete training and to assign (or un-assign) training to your learners.

**Note:** An activity displays as incomplete if the expiration date has passed. Inactive activities are not shown.

The first part of this section displays charts showing your managed users' complete and incomplete assigned **Learning Activities** and **Continuing Education**.

- **Direct Reports** refers to users who have you listed as their primary manager.
- **Others** refers to any other managed users, such as viewable users.

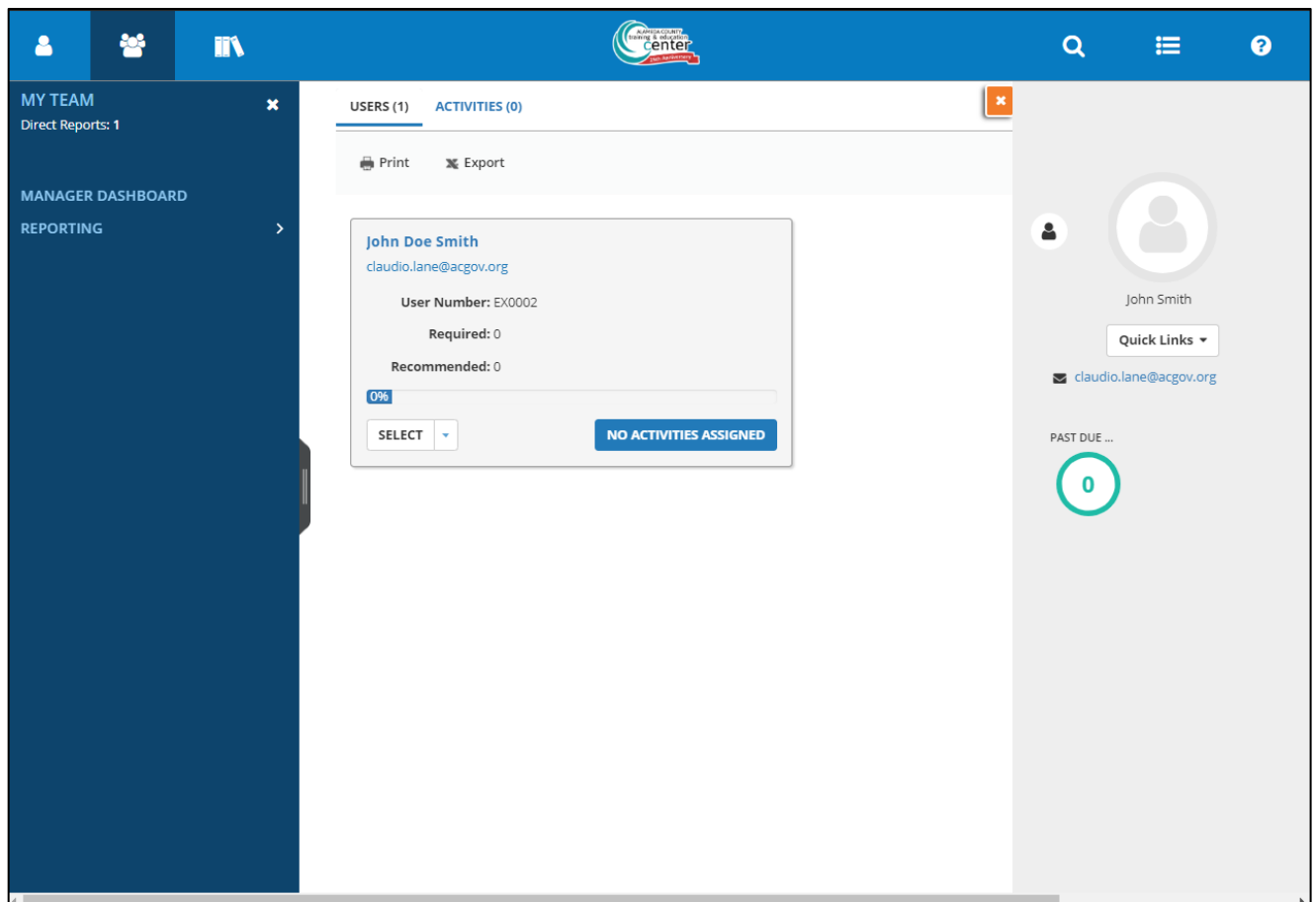
The bottom half of the **Exception Report** varies depending on the tab you select.

**Users:** Displays your direct reports and other managed and viewable users. Use the **Display** options to change the view to show:

- **Learning Activities** or **Continuing Education**
- **Direct Reports** or **All Viewable Users**

The screenshot shows the 'Exception Report' section of the Manager Dashboard, specifically the 'Users' tab. The 'USERS (3)' tab is selected, and the 'ACTIVITIES (6)' tab is also visible. A search bar labeled 'User Search...' is present. Below the tabs, there are buttons for 'Print' and 'Export'. The 'Display' section shows 'Learning Activities' selected for the first dropdown and 'Direct Reports' for the second. The 'Sort by' dropdown is set to 'Default'. Two user profiles are displayed: Tracy Abelson and Emily Arroyo. Each profile shows a progress bar for 'Required' and 'Recommended' activities. Tracy Abelson has 1 Required and 1 Recommended activity, with a 50% completion bar. Emily Arroyo has 2 Required and 0 Recommended activities, with a 33% completion bar. Both profiles have a 'PROFILE' dropdown and a '2 INCOMPLETE' button.

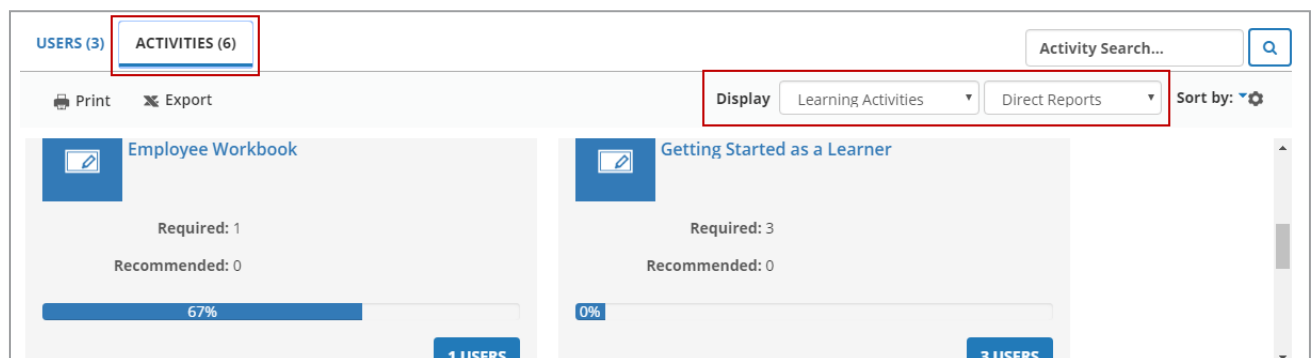
- Click on the name of your team member.



- Click the **Incomplete** or **No Activities Assigned** button to [View an exception report in detail](#) (below)

**Activities:** Displays all activities assigned to your managed users and the progress your learners have made towards completion. Use the **Display** options to change the view to show:

- **Learning Activities** or **Continuing Education**
- **Direct Reports** or **All Viewable Users**




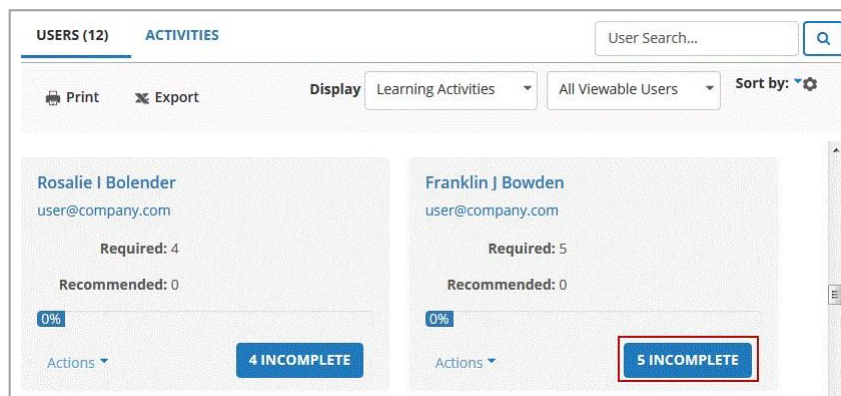
From here, you can click the **Users** button to [View an exception report in detail](#) (below).

**Note:** If every user assigned to the activity has completed it, the progress bar reads 100% and the **Users** button is grayed-out.

## View an Exception Report in Detail

In addition to the overviews provided on the **Manager Dashboard**, you can also access detailed exception reports for each user or activity from this page.

1. In the Header menu, click .
2. Navigate to the **Manager Dashboard**.
3. Select one of the tabs depending on the kind of exception report you want to view:
  - To view all the activities assigned to one user, select **Users**.
  - To view all the users assigned to one activity, select **Activities**.
4. Update the **Display** filters as needed to find the user or activity you need.
5. Access the detailed exception report.
  - If you're on the **Users** tab, find the user you want to view and click the **Incomplete** or **No Assigned Activities** button.
  - If you're on the **Activities** tab, find the activity you want to view and click the **Users** button. Our example is from the **Users** tab.



This takes you to the corresponding detailed exception report:

- ❖ **Users** tab: The **Detailed Exception Report by User** displays data (such as **Due date** and **Progress**) on the user's active assignments. This includes incomplete activities and future assignments. Depending on company settings, you may also see activities that are about to expire (under the **Assignment Status** "Expiring soon").
- ❖ **Activities** tab: The **Detailed Exception Report by Activity** displays data on any of your managed users that are assigned to the activity you selected.

The following is an example of the **Detailed Exception Report by User** page:

**DETAILED EXCEPTION REPORT BY USER** Keith Watson

Overall progress  
57.9%

List of activities assigned to this user.

Search

Q

Current Assignments

Last Processed: Thursday, June 13, 2019 12:00:34 AM EDT

Displaying 8 of 8 Records

Show all assignments (19)

Refresh

Add

Print

Export

Filter by:

Assignment Status

Assigned (5)

Completed (11)

Overdue (2)

Expired (1)

Incomplete (8)

Assignment Type

Assignment By

Activity Name	Assignment Type	Assignment Date	Due date	Progress
● <a href="#">Difficult People: Strategies to Keep Everyone Working Together</a>	Recommended	6/19/2018		0%
● <a href="#">Excel Best Practices</a>	Recommended	2/27/2015		0%
● <a href="#">How To Find Work You Love</a>	Required	1/21/2016	1/20/2017	0%

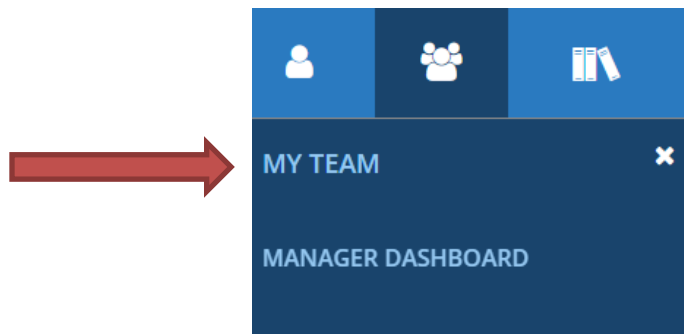
**Detailed Exception Report by User** displays Incomplete assignments by default. This includes all unfinished activities, including Overdue and Expired ones.

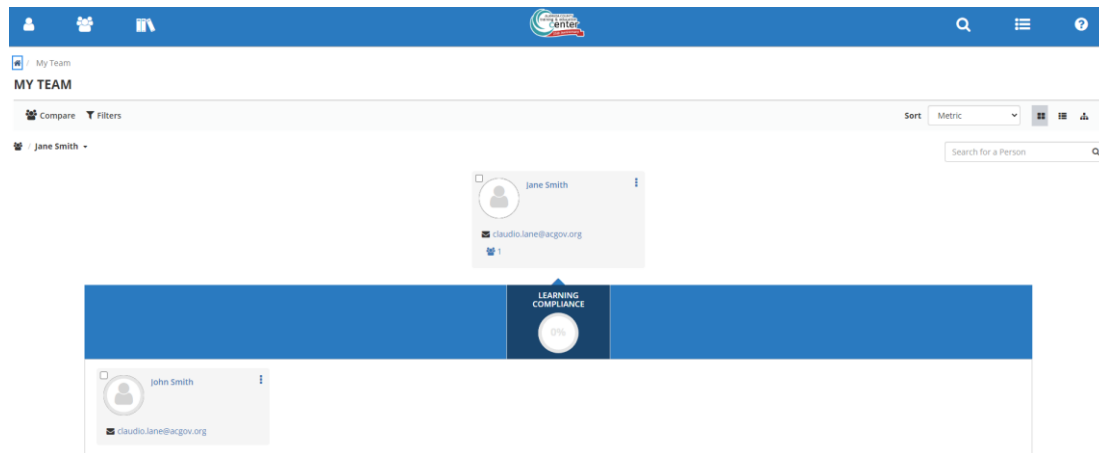
- ❖ From either exception report, you can view progress for your managed user(s). Use the filters to narrow your selection.
- ❖ You can also use the view drop-down to see **Current Assignments** (the assignment start date already occurred) or **Future Assignments** (the assignment start date is scheduled to occur in the future).
- ❖ See **Manage Training Assignments** as a Manager for more on the assignment start date. Depending on the exception report you're viewing, you have other options, too:
  - From the **User** exception report, you can view a **Summary** of the user's assignments or, if you have permission, [add or edit the user's assignments](#).
  - From the **Activities** exception report, if you have permission, you can [Register Others](#) to the activity.

## My Team

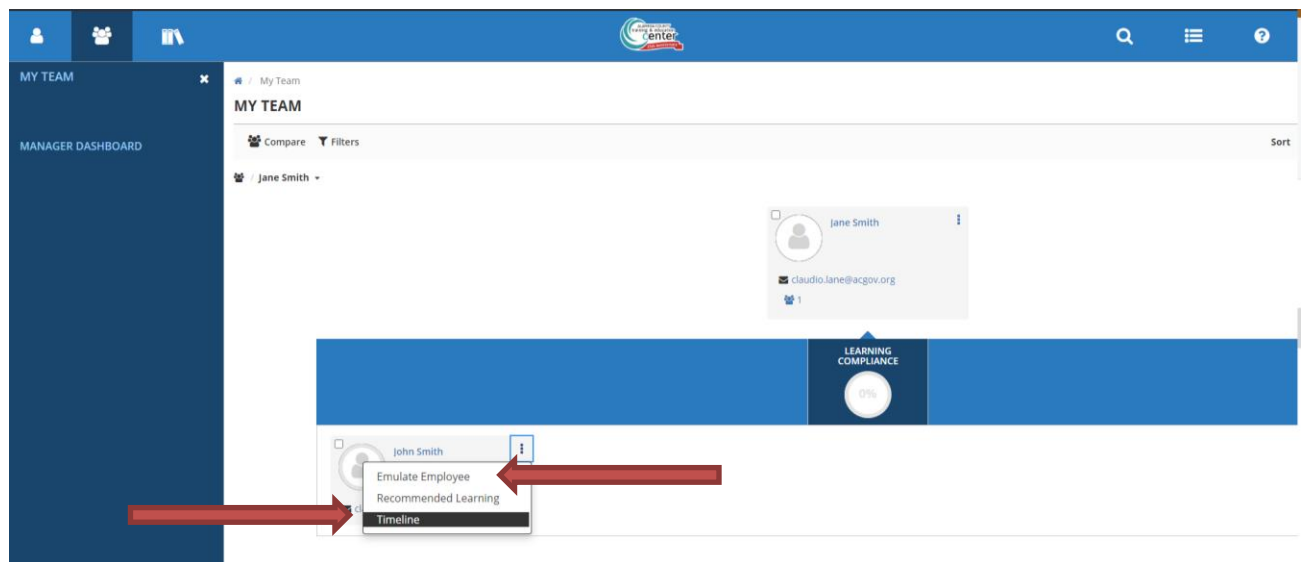
As a **Manager**, from this display you can:

- Select the My Team link to view your employees in an organizational chart structure.

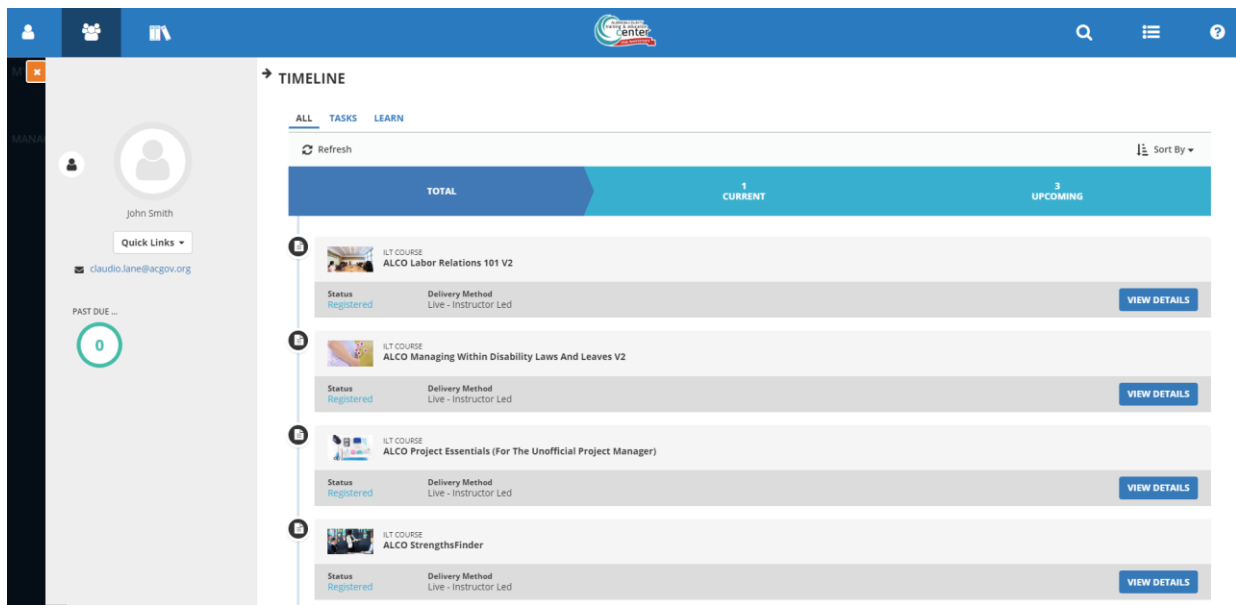




- All your team members will be listed here. At a glance, it will display the employee's Learning Compliance percentage. To dive in further, select the ellipses for the employee in which you would like to see more detail.



The employee's timeline appears.



## Manage Training Assignments

Based on your permissions, you can manage training assignments for your direct reports and other viewable users. You can assign, edit, and remove training assignments.

### Manager Assignment Exceptions and Considerations:

- If you can't access assignments and think that you should, talk to your departmental administrator.
- You can only remove the assignments that you made yourself.
- The assignments you can edit and the assignment properties that you can update depend on system and activity settings.
- Activity exceptions:
  - You can either assign entire ILT (Instructor-Led Training) Courses or individual ILT classes. When you search for ILT activities, either ILT courses or ILT classes will display in your search results. Whichever one displays is the one you need to assign.
  - You can only update assignments made by users.

## Where to Assign Training

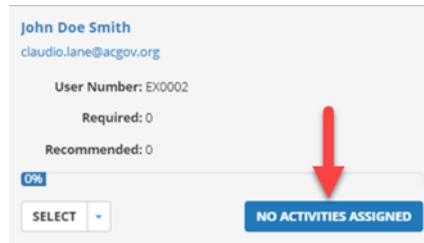
You can manage a learner's training from the following locations:

- Use the **Search** results page to assign, edit, or remove a single learning activity to one or more learners.
- Use the **Exception Reports** page to assign, edit, or remove one or more learning activity to a single learner.

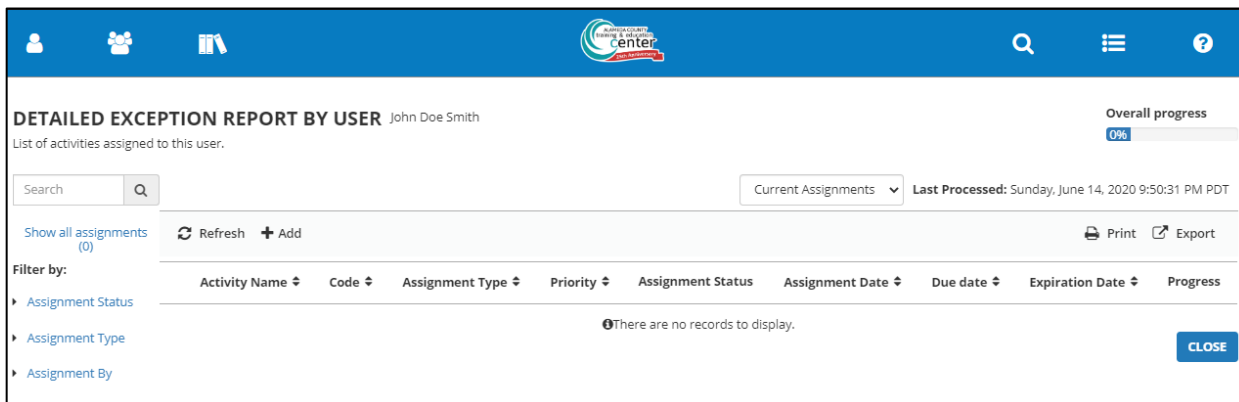


## Add or Edit Assignments

1. Navigate to the **Manager Dashboard**.
2. Under the employee's name in the Exception Reports section, click the button that reads either **No Activities Assigned** or **Incomplete** beside the Actions split button.



3. The **Detailed Exception Report by User** displays Incomplete assignments by default. This includes all unfinished activities, including Overdue and Expired ones.



4. On the **Detailed Exception Report by User** page, perform one of the following:
  - i. Add New Assignment - Click **Add**. Select the required learning activity (or activities) and click **Next**. Go to the next step.

**Tip:** If you're reassigning a completed activity that was previously assigned to the learner, you need to edit the assignment. You can't add it again.

**ASSIGN LEARNING ACTIVITIES TO USER** John Doe Smith

Select activities to assign to this user.

Search

Learning Activities (6883)

Filter by:

- Libraries
- Activity Type
  - Virtual Ses...
  - Document...
  - ILT Course...
  - ILT Class(1)
  - Course(68...

<input type="checkbox"/>	Name	Type	Code	Status	Start Date	End Date
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Arrays & Pr...	Course	it_sdsdp_02_enus	Not Assigned	-	-
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Class Conc...	Course	it_sdsdp_07_enus	Not Assigned	-	-
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Concurrency...	Course	it_sdsdp_14_enus	Not Assigned	-	-
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Core Java L...	Course	it_sdsdp_06_enus	Not Assigned	-	-
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Core JVM E...	Course	it_sdsdp_05_enus	Not Assigned	-	-
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Database A...	Course	it_sdsdp_16_enus	Not Assigned	-	-
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Functional ...	Course	it_sdsdp_09_enus	Not Assigned	-	-

Records 1-15 of 6883 Page 1 of 459 Go To Page

Selected Activities (0)

- ii. Please remember to click on the check box to the left of the activity name before clicking **Next**.

**ASSIGN LEARNING ACTIVITIES TO USER** John Doe Smith

Select activities to assign to this user.

Search

Learning Activities (6883)

Filter by:

- Libraries
- Activity Type
  - Virtual Ses...
  - Document...
  - ILT Course...
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<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Arrays & Pr...	Course
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Class Conc...	Course
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Concurrency...	Course
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Core Java L...	Course
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Core JVM E...	Course
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Database A...	Course
<input type="checkbox"/>	120-816 - Java SE 11 Programmer II: Functional ...	Course

Records 1-15 of 6883

Selected Activities (0)

5. Enter or update the **Assignment Options**. Required users must complete the activity or Recommended to do so.

- i. **Ignore Previous Completions:** Select this if you want to assign the activity to the selected learners even if they've already completed the activity.

**Manage Assignments**

EDIT ASSIGNMENTS FOR John Doe Smith

Select either one or all activities to set assignment options.

Select: All | None

++ Sort by: Name

Activity	Type	Status	Due Date
ALCO Project Essentials (For the Unofficial Project Manager)	Recommended	Assigned	No Due Date

**Assignment Options:**  
Selected Activities (1)

Type:  
☐ Required  
☒ Recommended  
☐ Ignore Previous Completions

Start Date:  
☒ Today  
☐ Days from today  
☐ On

Time zone:  
 UTC

Priority:  
 None

Due Date:  
☒ No Due Date  
☐ Within Day(s)  
☐ By


Time zone:  
 UTC

Assignment Notes:

Status:  
 Assigned

APPLY TO SELECTION

CANCEL BACK DONE

- ii. You can also click  to set a "cutoff date." If the learner completed the activity **before** this date, they're reassigned to it. If you don't set a cutoff date, Learning Management considers the current date as the cutoff date.

**Note:** While editing training assignments, you may realize you cannot change some options because the users you have selected have a combination of indirect and direct assignments. To edit training assignments, you must have the relevant domain or learning activity setting for **Manager Assignments** enabled. You can edit **Status** and **Notes** if you have permissions to edit direct or indirect assignments made by you and other managers. See [Working with Assignment Status](#) for more details on the **Status** options.

## Working with Assignment Status

You can change the assignment status for selected learners to one of the following:

- **Assigned:** This assigns the activity to the learner. The learner's assignment status remains Assigned even if the learner registers or re-registers, is waitlisted, pending approval, overdue, or has an expired certification.

**Assignment Options:**  
Selected Activities (1)

Type:  
☐ Required  
☒ Recommended  
☐ Ignore Previous Completions

Start Date:  
☒ Today  
☐ Days from today  
☐ On

Time zone:  
 UTC

Priority:  
 None

Due Date:  
☒ No Due Date  
☐ Within Day(s)  
☐ By

Time zone:  
 UTC

Assignment Notes:

Status:  
 Assigned

APPLY TO SELECTION

CANCEL BACK DONE

**Tip:** If you're working with multiple assignments at once and you want to update the settings for just a few of the activities, you can hold down the **Ctrl** key and click the names of the activities to select or deselect them.

- **Not applicable:** This denotes that a particular training does not apply to the needs of the learner. For example, the activity may have been assigned to the learner as part of an assignment to a larger group but may not apply to the individual.

The screenshot shows a web application interface for 'Manage Assignments'. At the top, there's a blue header with icons for user, home, and search. Below the header, the page title is 'Manage Assignments'. The main content area is titled 'DETAILED EXCEPTION REPORT BY USER' for 'John Doe Smith'. It includes a search bar, a dropdown for 'Current Assignments', and a 'Last Processed' timestamp. A table lists the assignments with columns for Activity Name, Code, Assignment Type, Priority, Assignment Status, Assignment Date, Due date, Expiration Date, and Progress. One assignment is listed: 'ALCO Project Essentials (For the Unofficial Project Manager)' with a progress bar at 0%. There are buttons for Refresh, Add, Edit Assignment, Remove Assignment, Print, and Export. A 'CLOSE' button is at the bottom right.

## Monitor Team's Progress

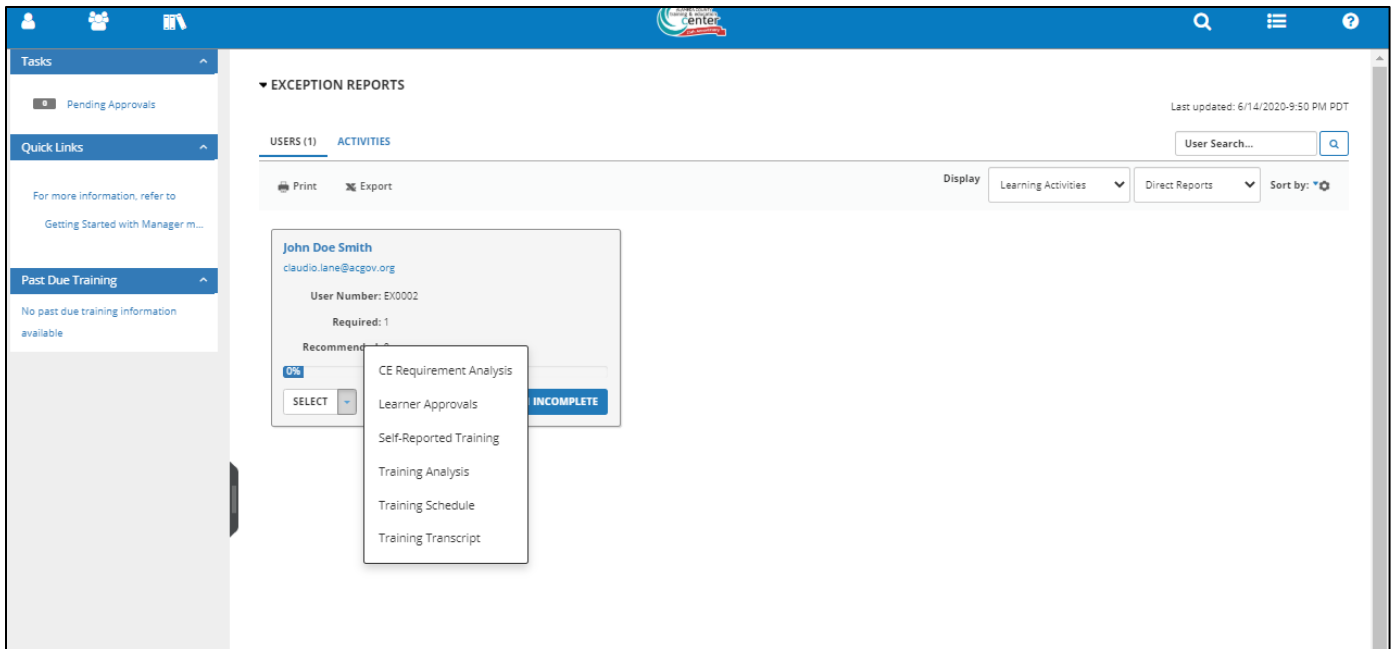
You can monitor your team's progress by analyzing their training. You may also be able to manage training and completion requests from your learners.

### View a Training Analysis for Your Direct Reports

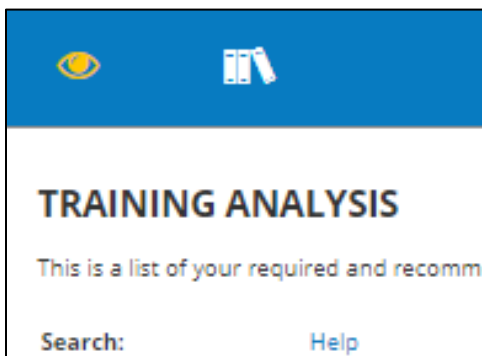
You can view training assigned to your managed and viewable users directly, by job, or by department from the **Training Analysis** page.

#### ► **To conduct a training analysis for a managed user:**

1. In the Header menu, click .
2. Navigate to the **Manager Dashboard**.
3. Under the employee's name in the Exception Reports section, click on **Select > Training Analysis**.



Doing this enables the emulate feature. This means that you will be logged in as the user. You will know that you are under the emulate function by the yellow eye at the upper left corner of your dashboard.



View upcoming or completed training.

- Use the **View** options to narrow the list by:
  - **All assigned training** (both required and recommended)
  - **Training assigned by job**
  - **Training assigned by organization**
  - **Training assigned directly**
  - **Training certifications**
  - **Assigned training requiring registration**
  - **All Completed assigned training**
  - **Certifications history:** All attempted certification training. This view includes details such as activity name, expiration date, and certification status.

**TRAINING ANALYSIS**

This is a list of your required and recommended training. Use the View list to filter the activities that you see below.

Search:  [Help](#)

Filter by: Required and recommended

View: All assigned training

Task: Add to development plan

<input type="checkbox"/>	Name ▲	Code	Priority	Assigned Date	Due Date	Last Completed Date		
<input type="checkbox"/>	ILT Class:ALCO Project Essentials (For the Unofficial Project Manager)	CLAS2020021111372202511256		6/15/2020			Required	Assigned

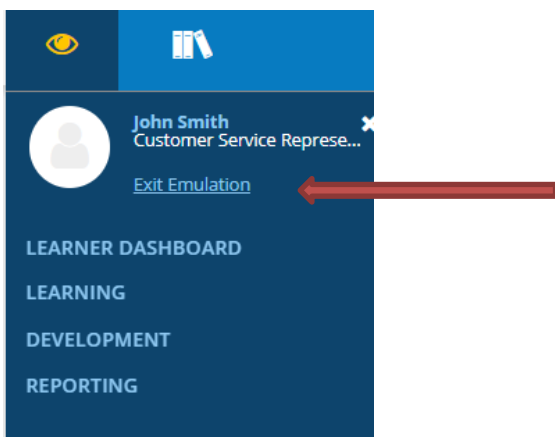
[Delivery Method Legend](#)

- Register for or **Launch** an activity.
- Click an activity name to view its **Activity Summary** page.
- Rate completed activities and view average ratings for rated activities.

To exit emulation mode, click on the yellow eye located at the upper left corner of your dashboard.



Then click **Exit Emulation**.



## Customer Support

If you need additional help, please contact the Training & Education Center at [aclearningcenter@acgov.org](mailto:aclearningcenter@acgov.org), or visit us online at [trainingcenter.acgov.org](http://trainingcenter.acgov.org) for County-wide sessions/offerings. For questions regarding departmental offerings, please contact your departmental training representative.