

# SumTotal

## Manager Guide

### County of Riverside HR

### Business Systems Solutions



# Contents

- Introduction ..... 2**
- Log into COR Learning Center ..... 3**
- Navigation ..... 4**
- Navigation ..... 5**
- View Direct Reports ..... 5**
- View Status of Assigned Training ..... 6**
- Exporting Reports to Excel ..... 9**
- View Transcript ..... 12**
- View Training Schedule ..... 13**
- Other Views ..... 14**
- Registering Others ..... 15**
- Assign Training ..... 18**

## Introduction

If you have direct reports identified in PeopleSoft you will receive the Manager Role in addition to the standard Learner Role in the COR Learning Management System (LMS). This guide covers all the additional abilities Managers have in the system.

With the Manager Role you will be able to:

- View training history and status of assigned training of direct reports.
- View direct reports' current training schedules.
- Register direct reports for activities.
- Assign training to direct reports.
- Approve training requests for direct reports.
- View, modify, or reject Self-Reported Training for Direct Reports.

Log into COR Learning Center

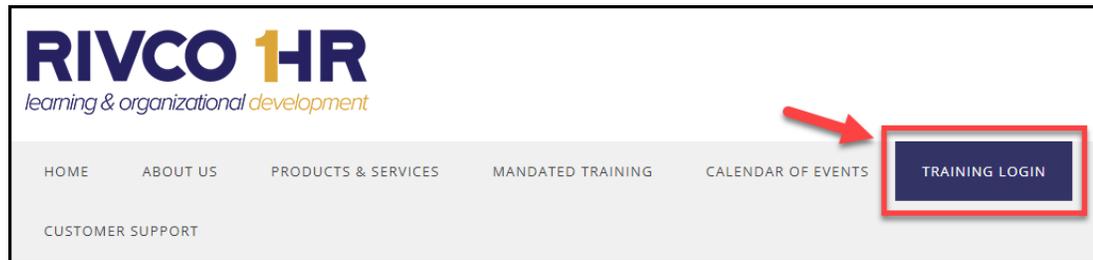
To access COR Learning Center:

Type the URL directly into your web browser: <https://corlearning.sumtotal.host/>,

OR

Go to the HR Learning & Organizational Development website and click the

**Training Login** link in the top menu bar: <https://corlearning.rc-hr.com/>.



- Click the **Login Now** button.

A screenshot of the RivCo Learning Portal login page. At the top, it says "RivCo Learning Portal" with a checkmark icon, followed by "(Access County Mandated Training and Skillssoft online courses)". Below this is a "Login Now" button, which is highlighted with a red rectangular box and a red arrow points to it from the left. Underneath the button, it says "County Employee Network login with @rivco.org and Network Password". At the bottom, there is a section titled "LOGIN SUPPORT:" with three bullet points providing instructions and contact information.

**LOGIN SUPPORT:**

- Please ensure that you **clear your web browser cache** before logging into COR Learning Center (Resource Link).
- If you work for the **Sheriff's Department** please ensure you are utilizing a username that ends in @rivco.org.
- For **Riverside University Health System (RUHS)** if you need assistance with your username, please contact the Help Desk at 951-955-9900 to obtain your login credentials.
- If you have any questions, please visit Customer Support.

- Click **County Employees**.
- Enter your **RIVCO login** ([username@rivco.org](mailto:username@rivco.org)) and **Password**. This will be the same password you use to access your workstation. If you are having trouble logging in, please contact your IT Help Desk.
- Click **Sign In**.

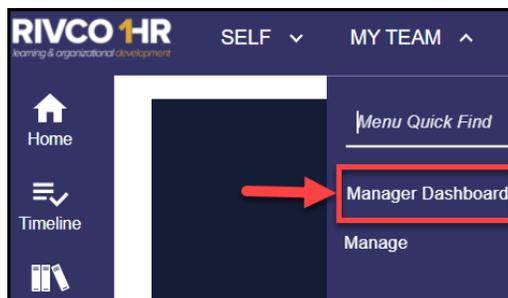


## Navigation

- In addition to **Self**, you will have a **My Team** menu in the top toolbar.



- Clicking the **My Team** button will open a menu with a link to your **Manager Dashboard**. Click Manager Dashboard to enter **Manager Mode**.

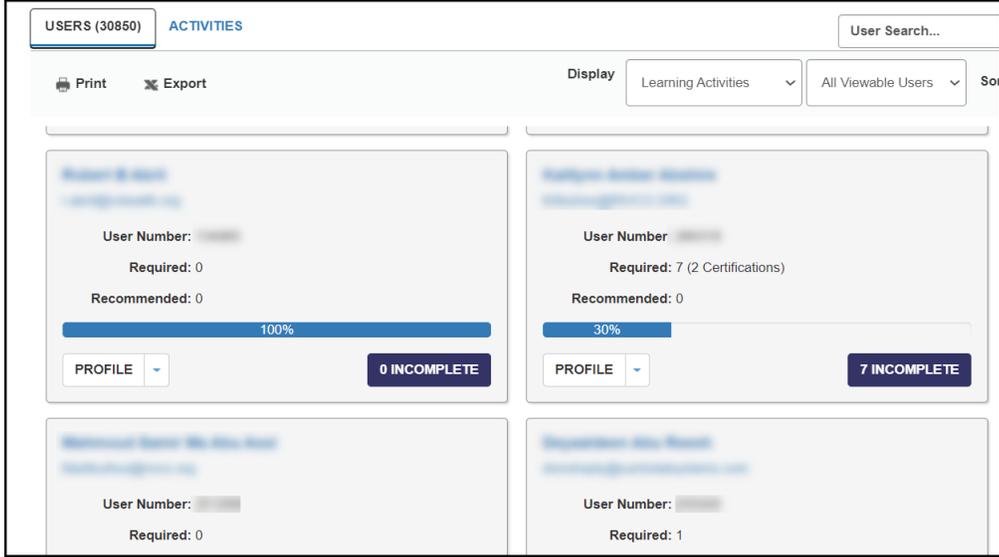


Navigation

When you open your **Manager Dashboard** you will be able to see:

- A list of your direct reports with the status of their individual assigned training.
- The names of individuals who are Past Due for assigned training.

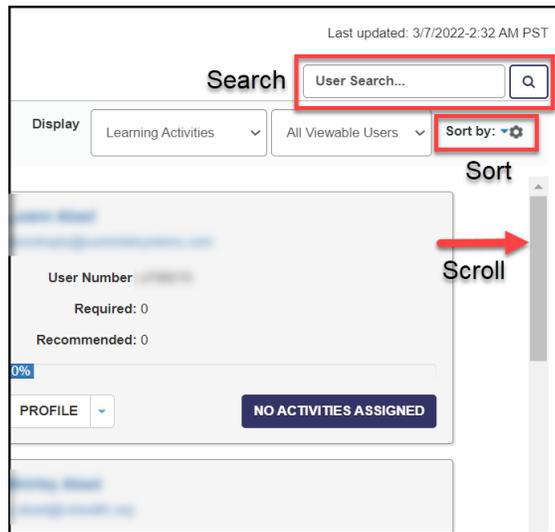
**Note:** Your Manager Dashboard is updated nightly. If one of your users completed assigned training after the last update, it will appear in this view the following day. However, the user’s **Training Transcript** and **Schedule** are displayed in real time and will show you their latest progress.



View Direct Reports

To locate a particular user, scroll through the name tiles, search by name, or sort by ascending or descending order (i.e., by name, assignment progress). You will automatically see all users reporting to you in PeopleSoft. If any of your employees are missing, contact your department’s PeopleSoft representative for further assistance.

Search for your direct report by searching, sorting, or scrolling:



### View Status of Assigned Training

There are several ways to see the status of your direct reports' assigned training. When you open the Manager Dashboard you will see an overview of your direct reports and the status of their assigned training.

- The **Exception Report** will show you the percentage of compliance your direct reports are currently at with their assigned training (this does not include training that is not assigned).
- To view a more detailed report for an individual employee, click the **Incomplete** button.
- Use the filters on the left side of the screen to view training by assignment status.

**DETAILED EXCEPTION REPORT BY USER** Overall progress 22/26

List of activities assigned to this user.

Search  Current Assignments ▾ Last Processed: Monday, March 7, 2022 2:32:04 AM PST  
Displaying 7 of 7 Records

Show all assignments (9) Refresh + Add Print Export

Filter by:

- ▼ Assignment Status
  - Completed (2)
  - Overdue (7)
  - Incomplete (7)
- ▶ Assignment Type
- ▶ Assignment By

Activity Name	Assignment Type	Assignment Status	Assignment Date	Due date	Expiration Date	Progress
○ Disability Awareness Online	Required	Overdue	8/29/2019	11/27/2019		<span style="border: 1px solid black; padding: 2px;">0%</span>
○ ▶ Employee Harassment Prevention	Required	Overdue	4/7/2020	7/6/2020		<span style="border: 1px solid black; padding: 2px;">0%</span>
○ ▶ Employee Workplace Violence	Required	Overdue	8/29/2019	11/27/2019		<span style="border: 1px solid black; padding: 2px;">0%</span>

**Assigned Training by Activity**

You can also see the activities assigned to your direct reports and the overall completion listed by training.

- Switch from the **Users** view to **Activities** to see all the activities that are currently assigned to your direct reports.
- You will see how many users are still required to complete each training and the overall percentage of completion.

**USERS (4457) ACTIVITIES (72)** Activity Search...

Print Export All Viewable Users ▾

ILT Course CORPDILT-0362  
**Administrative Assistants Workshop**

Required: 0  
Recommended: 1

0%

**1 USERS**

eCourse DPSS-APS-05...  
**Adult Services Division Voter Registration**

Required: 15  
Recommended: 0

97%

**15 USERS**

ILT Course CORBHILT-00...  
**Behavioral Health New Employee Orientation**

Required: 0  
Recommended: 0

100%

ILT Course CORHRILT-03...  
**CalPERS-Retirement Planning**

Required: 0  
Recommended: 1

0%

Clicking the **Users** button will show you who is still required to complete the training and if they have started, what their percentage of completion is. In addition, you can register users for the training from this page. You cannot assign the training to additional users from this page.

eCourse DPSS-APS-05...  
**Adult Services Division  
Voter Registration**

Required: 15  
Recommended: 0

97%

15 USERS

Activity	Required	Start Date	End Date	Buttons
...	Required	11/3/2020	11/17/2020	[OK]
...	Required	11/3/2020	11/17/2020	[OK]
...	Required	11/3/2020	11/17/2020	[OK]
...	Required	4/3/2021	4/16/2021	[OK]
...	Required	11/3/2020	11/17/2020	[OK]
...	Required	11/3/2020	11/17/2020	[OK]
...	Required	11/3/2020	11/17/2020	[OK]
...	Required	11/3/2020	11/17/2020	[OK]
...	Required	11/3/2020	11/17/2020	[OK]

REGISTER OTHER [CLOSE]

Click the **Close** button to return to the Manager dashboard.

### Individual Reports

To view a detailed report for an individual user:

- Locate the user you wish to see more information about.
- Click the **Incomplete** button.

donotreply@sumtotalsystems.com

User Number: [redacted]

Required: 4 (4 Certifications)  
Recommended: 0

81%

PROFILE [dropdown]

4 INCOMPLETE

This will show you an overview of the user's assigned training:

- A list of all training that has been assigned to the user.
- The Due Date and current status for each training.
- Overall Progress in completing assigned training.

- Click the course **Title** to view more information about the training, including who assigned the training.
- Use the Assignment Status filters to sort by **Overdue**, **Expired**, **Completed**, or **Incomplete**.
- Exit the summary then click the **Close** button to return to your Manager Dashboard.

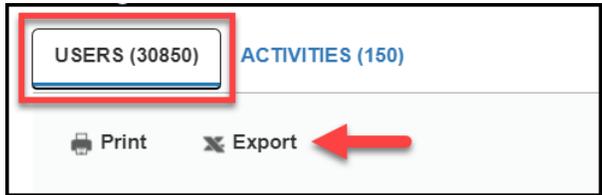
Exporting Reports to Excel

You can export reports on your employees' assigned training as a group, by activity, or by individual user.

**All Users**

To get a Summary Report on the status of assigned training for all your direct reports:

- Select the Users view.
- Click **Export**
- Click **Next** in the pop-up window.
- Click the **link** to download the report.
- Click **Ok** to exit the window.



**By Activities**

You can run a report on Activities by switching to view all the activities assigned to your direct reports. This report will show you all the activities that are assigned and a summary of how many users are in compliance.

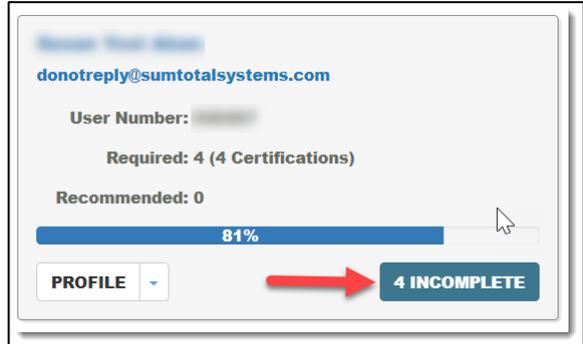
- Click **Export**.
- Click **Next**.
- Click the **link** to download the report.
- Click **Ok** to exit the window.



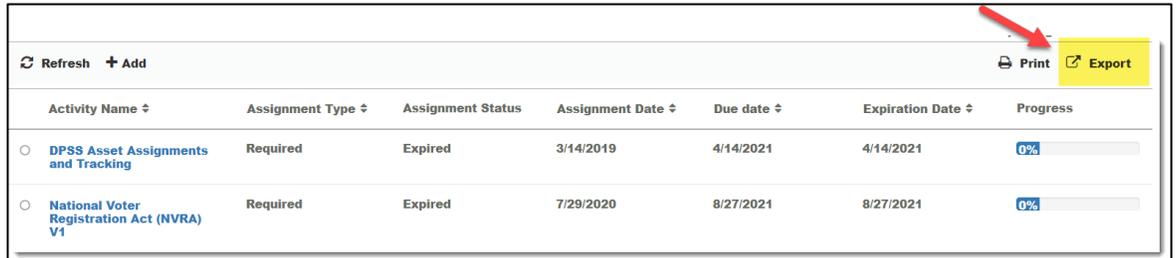
**By User**

If you wish to pull a report into excel for just one user:

- Locate the user you wish to see more information about.
- Click **Incomplete** button.



- Click **Export**.
- Click **Next**.
- Click the **link** to download the report.
- Click **Ok** to exit the window.

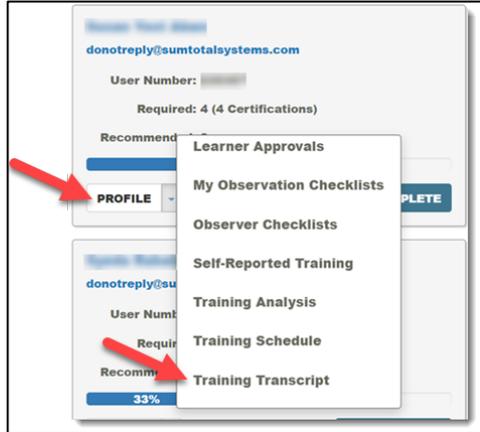


Activity Name ↕	Assignment Type ↕	Assignment Status	Assignment Date ↕	Due date ↕	Expiration Date ↕	Progress
<input type="radio"/> <a href="#">DPSS Asset Assignments and Tracking</a>	Required	Expired	3/14/2019	4/14/2021	4/14/2021	0% <input type="text"/>
<input type="radio"/> <a href="#">National Voter Registration Act (NVRA) V1</a>	Required	Expired	7/29/2020	8/27/2021	8/27/2021	0% <input type="text"/>

## View Transcript

You can view a direct report's training transcript to view all their completed training.

- Locate the employee whose transcript you wish to view.
- Click the **Profile** drop down and select **Training Transcript**.



You will be taken to emulation mode where you can view the transcript, certificates of completion, and export to PDF.

Activity	Estimated Credit Hours	Start Date	Completion Date - Expiration Date	Score	Attended Duration	Signature Status
 eCourse: <a href="#">County of Riverside: COVID-19 Awareness Training</a>	0.5	1/11/2021	1/12/2021	89	Day(s): 0, Hour(s): 0, Minute(s): 23, Second(s): 57.9	
 eCourse: <a href="#">DPSS Civil Rights v1</a>	0.5	1/11/2021	1/11/2021 - 1/11/2023	80	Day(s): 0, Hour(s): 0, Minute(s): 22, Second(s): 6.2	
 eCourse: <a href="#">Self-Service Options: Linking</a>	0.03	10/20/2020	10/20/2020		Day(s): 0, Hour(s): 0, Minute(s): 3, Second(s): 15	

- Adjust the date filters by year or show All.
- To view individual certificates of completion, click the certificate icon to the left of the course name.

Activity	Estimated Credit Hours
 eCourse: <a href="#">County of Riverside: COVID-19 Awareness Training</a>	0.5
 eCourse: <a href="#">DPSS Civil Rights v1</a>	0.5
 eCourse: <a href="#">Self-Service Options: Linking</a>	0.03

The certificate will be displayed along with options to **Print** or **Export to PDF**.



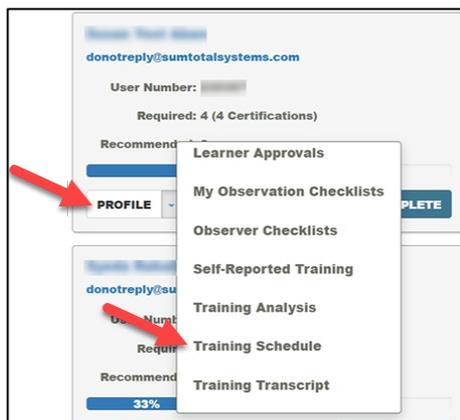
- Click **Export to PDF**.
- Click the link to download the PDF.
- Click **OK** to close the window.
- Click **Exit Emulation** to return to your dashboard.



### View Training Schedule

You can view a direct report's training schedule to see their current registrations and progress.

- Locate the employee you wish to view.
- Using the **Profiles** drop down select **Training Schedule**.



The Training Schedule displays any current registrations and any online training that is in progress.

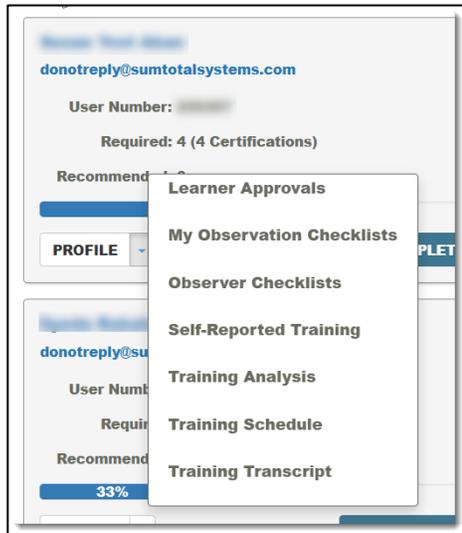
Activity Name ^	Status	Code	Region	Start Date	End Date	Action
<input type="checkbox"/> Implicit Bias class to the end ILT Class	REGISTERED	DPSS-APS-04859-000019		12/25/2021	12/25/2021	
<input type="checkbox"/> Upgrade Domain Test ILT Class	REGISTERED	COR-DomainUpgrade2-000005		3/29/2021	3/29/2021	

You can also see:

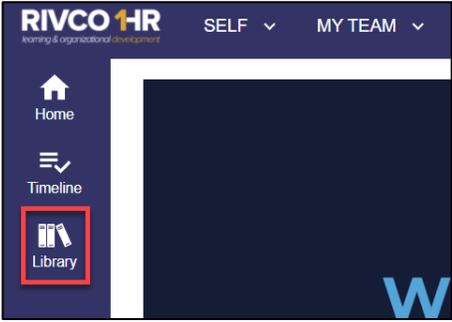
- **Calendar:** upcoming activities the employee is scheduled to attend.
- **Current/Upcoming Activities:** any training they are currently registered in.
- **Completed Registrations:** past activities they have completed.
- **Wait List or Pending Approval:** activities they are waitlisted for or awaiting approval to take.
- **Express Interest:** activities they have expressed an interest in.
- Click **Exit Emulation** to return to your dashboard.

**Other Views**

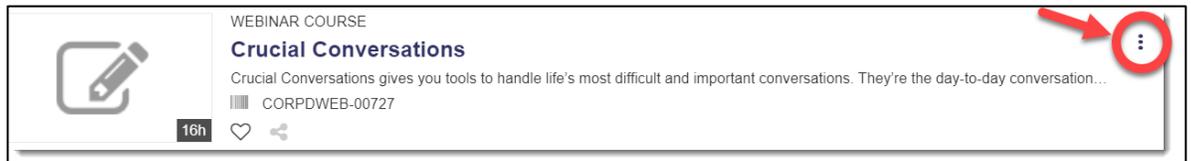
In addition to viewing your employee’s transcript and current schedule you can also use the Profile drop down button to review the following items:



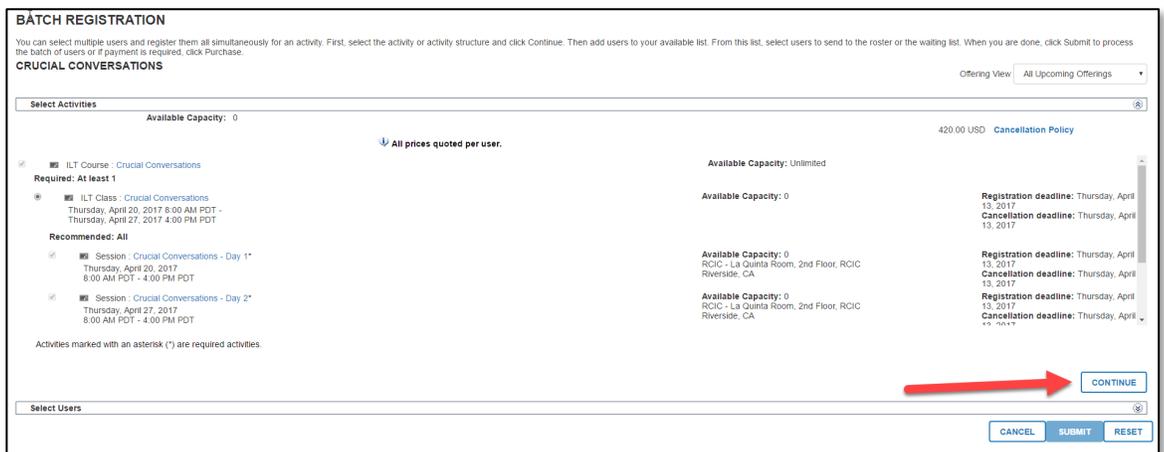
	<ul style="list-style-type: none"> <li>• <b>Learner Approvals:</b> Registration approvals you have made or rejected for your direct reports.</li> <li>• <b>My Observation Checklists:</b> Observation Checklists that have been approved or are pending approval.</li> <li>• <b>Observer Checklists:</b> Observer Checklists you are responsible for approving for others.</li> <li>• <b>Self-Reported Training:</b> Training direct reports have added to their profile (feature not currently being used).</li> <li>• <b>Training Analysis:</b> All assigned training and current status.</li> <li>• <b>Training Schedule:</b> All current registrations or in-progress online training.</li> <li>• <b>Training Transcript:</b> All past completed training.</li> </ul> <p>Click <b>Exit Emulation</b> to return to your dashboard.</p>
--	---

<p>Registering Others</p>	<p>You can register your direct reports for training.</p> <ul style="list-style-type: none"> <li>• Locate the activity you wish to register others in by using the <b>Library</b> or <b>Search</b> for the course using the title or a keyword.</li> </ul>  <p>OR:</p> 
---------------------------	--

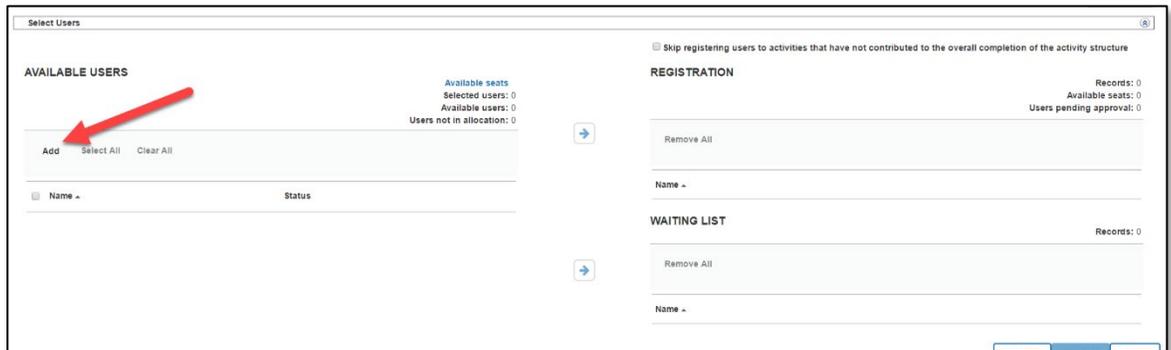
- Once you locate the activity, click the three dots, then select **Register Others**.



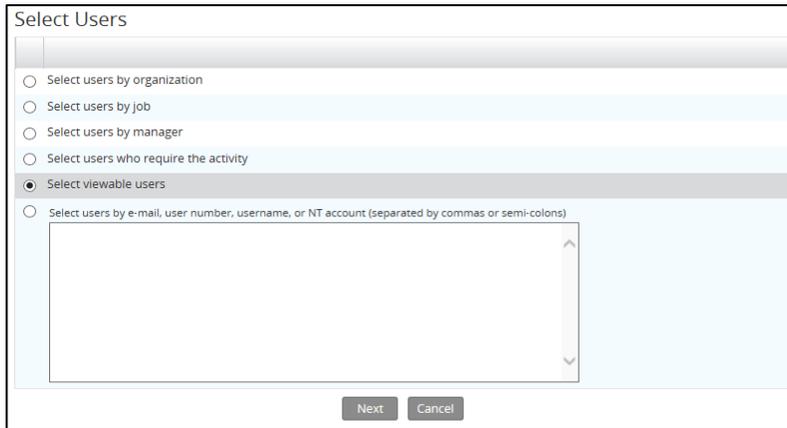
- For an online course click **Continue** to register users. For live in-person or virtual training first select the class date(s) you prefer then click **Continue**.



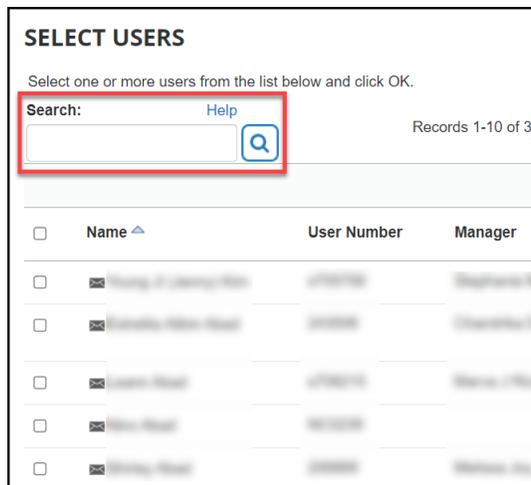
- Click **Add** under Available Users to locate the employee(s) you wish to register.



- From the options displayed, choose **Select Viewable Users**.
- Click **Next**.

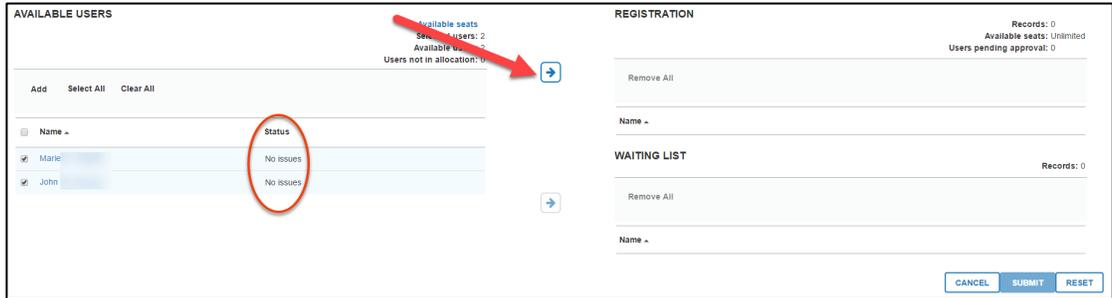


- **Select Viewable Users** displays a complete list of your viewable users. You have the options to:
  - **Search** for an employee by name.
  - **Browse** the list of users for employees you wish to register.
  - **Click Select All** at the bottom of the page to select all active users or select the top box to select all users on the current page.
- Select the **check box** next to the employee(s) you wish to register.



**Note:** If employees are already registered in the activity, they will not be shown in this list.

- Click **OK** at the bottom of the screen to continue.
- Check to see there are **“No issues”** next to the users. An alert will display if there is a conflict on the employee’s training schedule.



- If you have selected someone you don’t wish to register uncheck the box next to them.
- Click the **Top Arrow** to move the selected users over to Registration.
- Click **Submit** once all users have been moved over.

The users are now registered for the activity.

**Note:** If the activity is in-person employees will receive an email notification of their registration. If the activity is online there may be no registration notification. You may want to inform them that you have registered them.

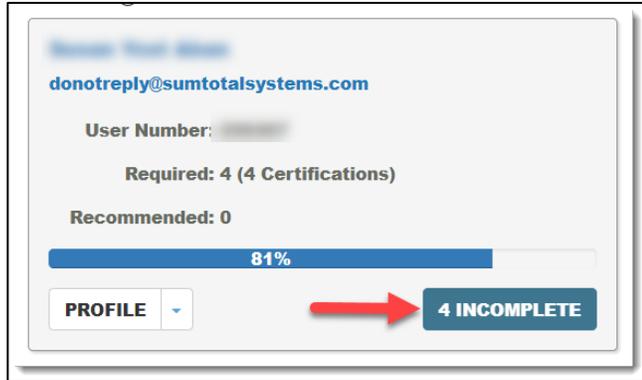
**Assign Training**

County Mandated training is assigned to all users automatically, but there may be additional training you would like your direct reports to complete. You can assign training to direct reports as a requirement and set up a due date. Employees cannot remove or cancel training that has been assigned to them. After you assign a specific course, the employee can register for an upcoming class prior to the due date you indicate. Not all training is available for managers to assign.

Training must be assigned by individual; batch training assignment is not available. If you want to assign training to a large group, please contact [corlearning@rivco.org](mailto:corlearning@rivco.org) for assistance.

To assign training:

- Log in to COR Learning Center.
- Click the **My Team** Icon and select **Manager Dashboard**.
- Locate the users you wish to assign training to.
- Click the **Incomplete** button.



donotreply@sumtotalsystems.com

User Number: [blurred]

Required: 4 (4 Certifications)

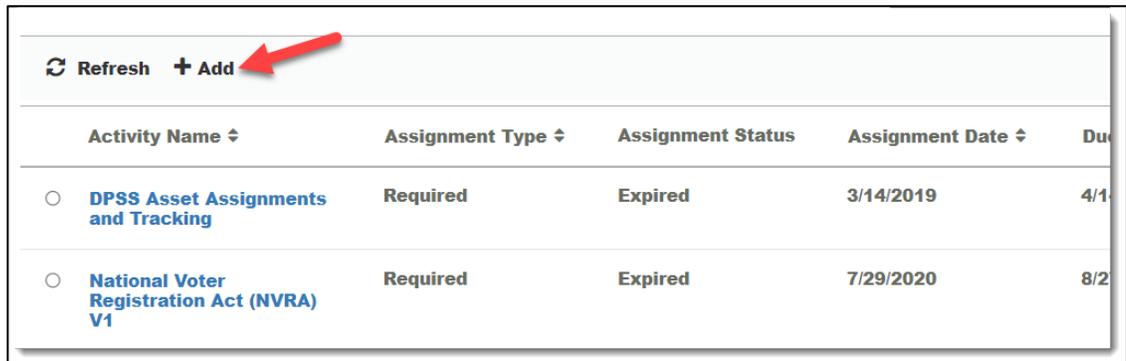
Recommended: 0

81%

PROFILE ▾

4 INCOMPLETE

- Click **Add**



Refresh + Add

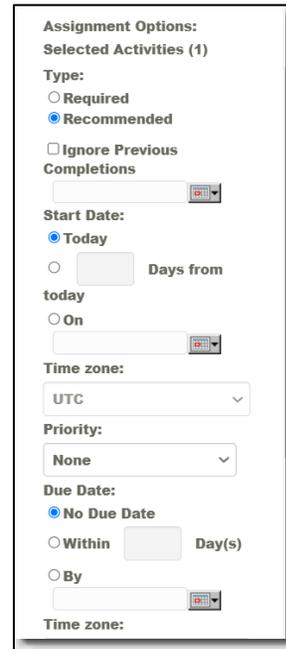
Activity Name ⇅	Assignment Type ⇅	Assignment Status	Assignment Date ⇅	Duration
<input type="radio"/> DPSS Asset Assignments and Tracking	Required	Expired	3/14/2019	4/1
<input type="radio"/> National Voter Registration Act (NVRA) V1	Required	Expired	7/29/2020	8/2

- You will see a list of training that is available for you to assign. You can search for a particular training or filter by activity type.



- Locate and select the **check box** next to the training you wish to assign. You can select multiple trainings at once.
- Click **Next**.

- Enter information about the Assignment(s).
  - Is it Required or Recommended?
  - Due Date
  - Priority (optional)\*
  - Any notes you wish to add.



- Priority is an optional description. Select **Manager Assigned, Job Specific**, or leave blank depending on your preference.
- Click **Done**. An assignment notification will be sent to the employee overnight via email.



For additional information  
about this guide or its contents, contact:

County of Riverside HR  
Business Systems Solutions  
LMS Domain Administrators  
[LMS-Admin-WorkRequests@rivco.org](mailto:LMS-Admin-WorkRequests@rivco.org)