

COR Learning: Manager Guide



Updated 12/22/2021

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.

Table of Contents

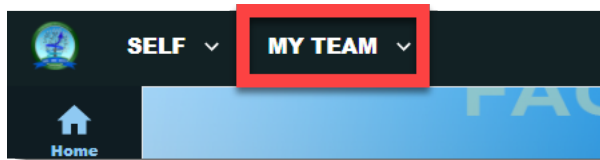
Introduction	1
Logging in to COR Learning Center	2
Navigation	2
Manager Dashboard	2
View Direct Reports	3
View Status of Assigned Training	3
Exporting Reports to Excel	6
View Transcript	8
View Training Schedule	9
Other Views	10
Registering Others	11
Assign Training	14

Logging into COR Learning Center

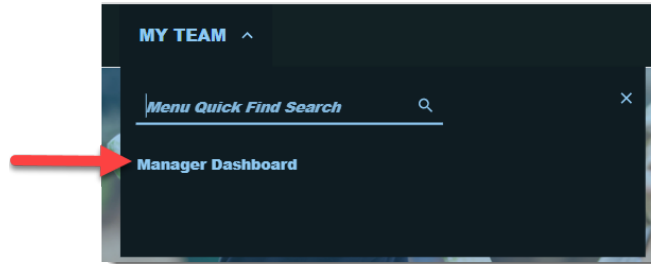
1. Login to COR Learning Center by going to <https://corlearning.sumtotal.host/>.
2. Enter your **RIVCO login (username@rivco.org)** and **Password** and then click Sign In. This will be the same password you use to access your workstation. If you are having trouble logging in please contact your IT Help Desk.

Navigation

In addition to **Self**, you will have a **My Team** menu at the top of your toolbar.



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

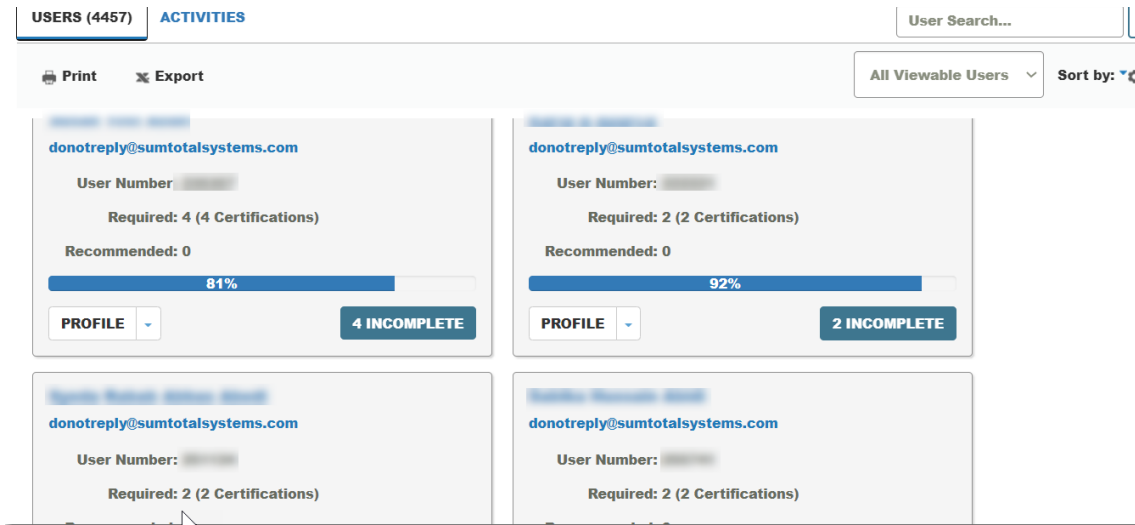


Manager Dashboard

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

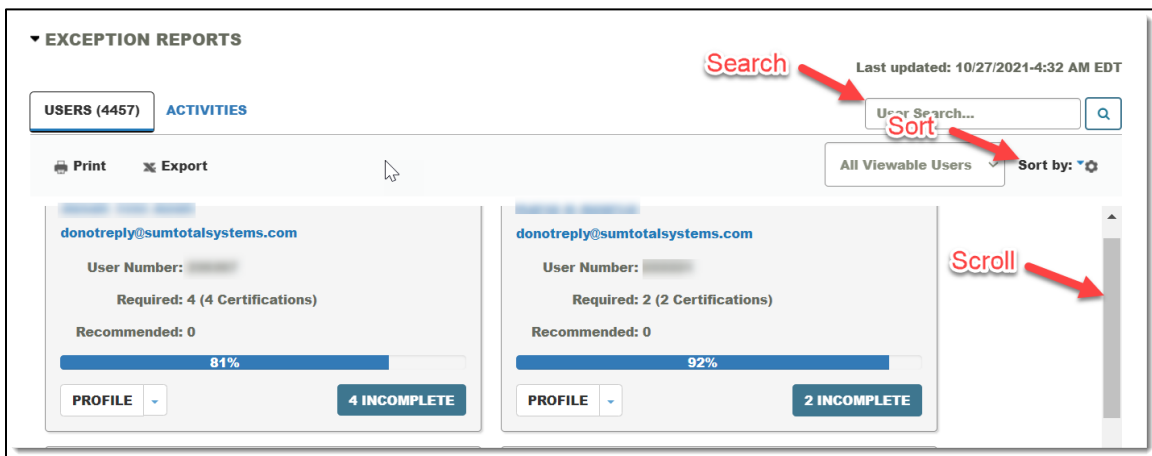
- A list of your direct reports with the status of their individual assigned training.
- The names of individuals who are Past Due for assigned training.

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 after the next update. 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 (by name, assignment progress, etc). 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.



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.

1. 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 right side of the screen to view training by assignment status.

Table with columns: Activity Name, Assignment Type, Assignment Status, Assignment Date, Due date, Expiration Date, Progress.

Activity Name	Assignment Type	Assignment Status	Assignment Date	Due date	Expiration Date	Progress
DPSS Asset Assignments and Tracking	Required	Expired	3/14/2019	4/14/2021	4/14/2021	0%
National Voter Registration Act (NVRA) V1	Required	Expired	7/29/2020	8/27/2021	8/27/2021	0%
Personally Identifiable Information (PII) Privacy and Security Course V1	Required	Expired	9/21/2018	9/29/2021	9/29/2021	0%
Policy ASS - Information Security Training	Required	Overdue	9/28/2020	9/28/2021		100%

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.

Activity Search...

Print Export All Viewable Users

Activity Name	Required	Recommended	Progress	Users
ILT Course CORPDILT-0362 Administrative Assistants Workshop	0	1	0%	1 USER
eCourse DPSS-APS-05... Adult Services Division Voter Registration	15	0	97%	15 USERS
ILT Course CORBHILT-00... Behavioral Health New Employee Orientation	0	0	100%	
ILT Course CORHRILT-03... CalPERS-Retirement Planning	0	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

Detailed Exception Report by Activity

Activity	Status	Required	Start Date	End Date	Progress
...	...	Required	11/3/2020	11/17/2020	0%
...	...	Required	11/3/2020	11/17/2020	0%
...	...	Required	11/3/2020	11/17/2020	0%
...	...	Required	4/2/2021	4/16/2021	0%
...	...	Required	11/3/2020	11/17/2020	0%
...	...	Required	11/3/2020	11/17/2020	0%
...	...	Required	11/3/2020	11/17/2020	0%
...	...	Required	11/3/2020	11/17/2020	0%

REGISTER OTHER CLOSE

4. Click the **Close** button to return to the Manager Dashboard.

Individual Reports

To view a detailed report for an individual user:

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

donotreply@sumtotalsystems.com

User Number: [redacted]

Required: 4 (4 Certifications)
 Recommended: 0

81%

PROFILE

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.

DETAILED EXCEPTION REPORT BY USER [Redacted]

List of activities assigned to this user.

Search [] [Q]

Current Assignments [v] Last Processed: Wedne

Show all assignments (16) Refresh + Add

Filter by:

- Assignment Status
 - Completed (12)
 - Overdue (1)
 - Expired (3)
 - Incomplete (4)
- Assignment Type [v]
- Assignment By [v]

Activity Name	Assignment Type	Assignment Status	Assignment Date	Due date	Expir
DPSS Asset Assignments and Tracking	Required	Expired	3/14/2019	4/14/2021	4/14/21
National Voter Registration Act (NVRA) V1	Required	Expired	7/29/2020	8/27/2021	8/27/21
Personally Identifiable Information (PII) Privacy and Security Course V1	Required	Expired	9/21/2018	9/29/2021	9/29/21
Policy ASS - Information Security Training	Required	Overdue	9/28/2020	9/28/2021	

Description: A self-paced course on the management of DPSS assigned assets; their tracking, administration, inventory, and associated requests and forms. Instructs the user on the necessity of, and personal responsibilities for, monitoring and managing department assets (tagged). Upon completion of this program, the student will: Understand the need for asset tracking Understand the use of Asset Tracking Forms Know how to perform a self-certification Know when, and how, to submit an asset related RIVCOHelp request Be familiar with their personal, and/or supervisory responsibilities

Activity Type: eCourse

Assignment Status: Expired

Assignment By: Aud - (DNE) DPSS Asset Assignments and Tracking Campaign

SUMMARY CLOSE

- 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:

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

USERS (4457) **ACTIVITIES (72)**

Print Export

donotreply@sumtotalsystems.com

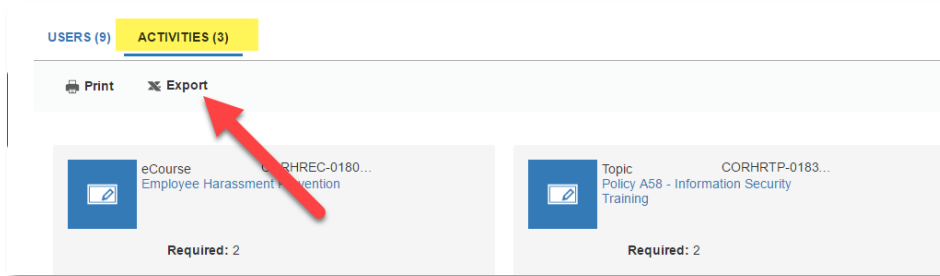
User Number: [Redacted]

Required: 4 (4 Certifications)

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.

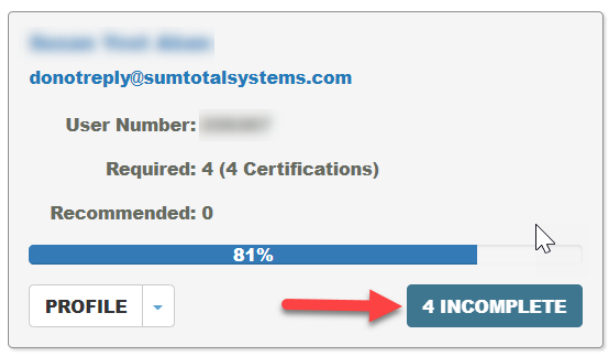
- Click **Next**.
- Click the **link** to download the report.
- Click **Ok** to exit the window.



By User

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

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



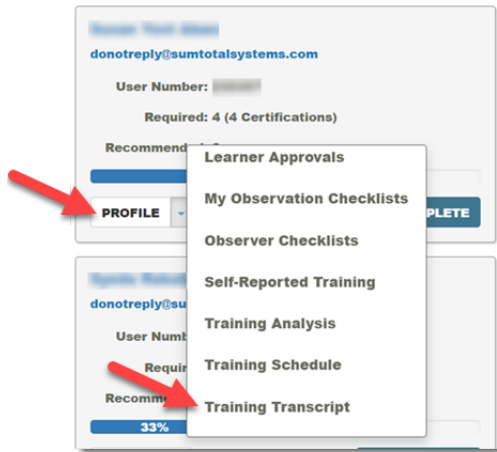
3. Click **Export**.
- Click **Next**.
- Click the **link** to download the report.
- Click **Ok** to exit the window.

Activity Name	Assignment Type	Assignment Status	Assignment Date	Due date	Expiration Date	Progress
DPSS Asset Assignments and Tracking	Required	Expired	3/14/2019	4/14/2021	4/14/2021	0%
National Voter Registration Act (NVRA) V1	Required	Expired	7/29/2020	8/27/2021	8/27/2021	0%

View Transcript

You can view a managed employee’s training transcript to view all their completed training.

1. Locate the employee whose transcript you wish to view.
2. 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: County of Riverside: COVID-19 Awareness Training	0.5	1/11/2021	1/12/2021	89	Day(s): 0, Hour(s): 0, Minute(s): 23, Second(s): 57.9	
eCourse: DPSS Civil Rights v1	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: Self-Service Options: Linking	0.03	10/20/2020	10/20/2020		Day(s): 0, Hour(s): 0, Minute(s): 3, Second(s): 15	

3. You can adjust the date filters by year or show All.
4. To view individual certificates of completion, click the certification icon.

Activity	Estimated Credit Hours
eCourse: County of Riverside: COVID-19 Awareness Training	0.5
eCourse: DPSS Civil Rights v1	0.5
eCourse: Self-Service Options: Linking	0.03

This will display the certificate and options to **Print** or **Export to PDF**.

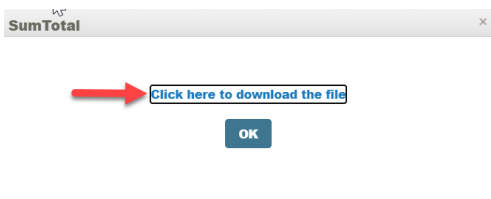


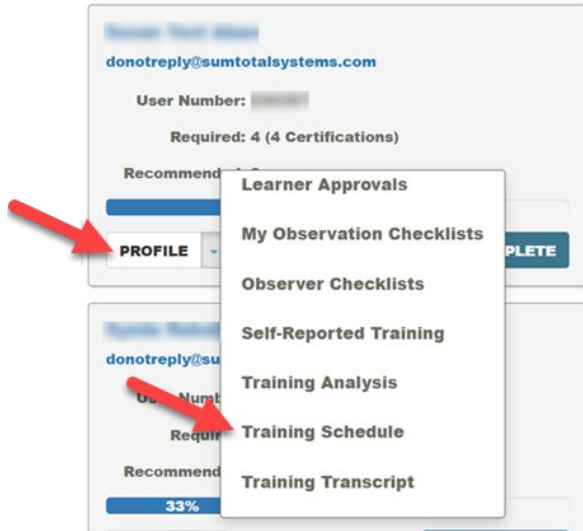
- If you click **Export to PDF** another window will appear.
 - Click the link to download the PDF.
 - Click **OK** to close the window
5. Click **Exit Emulation** to return to your dashboard.

View Training Schedule

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

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





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

ALL	ONGOING ACTIVITIES	UPCOMING ACTIVITIES	FIXED DURATION ACTIVITIES	COMPLETION REQUESTED ACTIVITIES	Displaying 2 of 2 Records 10 25 50		
Export To Excel Print Cancel Registration View Calendar							
<input type="checkbox"/>	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	

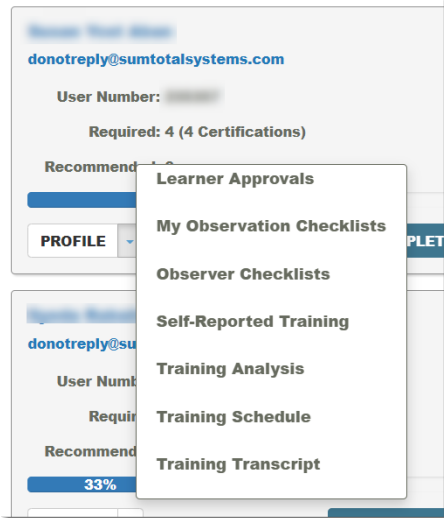
You can also see:

- **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.

3. 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:



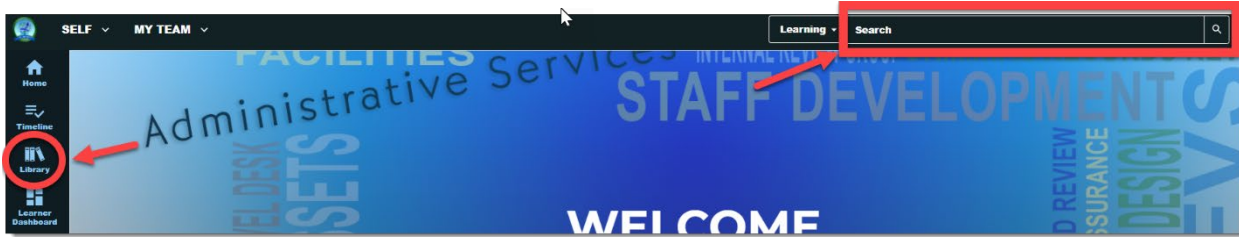
- **Learner Approvals:** Any registration approvals they have made or rejected for their direct reports.
- **My Observation Checklists:** Observation Checklists that have been approved or are pending approval (feature not currently being used).
- **Observer Checklists:** Observer Checklists they are responsible for approving for others (feature not currently being used).
- **Self-Reported Training:** Training they have added to their profile (feature not currently being used).
- **Training Analysis:** All assigned training and current status.
- **Training Schedule:** All current registrations or in-progress online training.
- **Training Transcript:** All past completed training.

Click **Exit Emulation** to return to your dashboard.

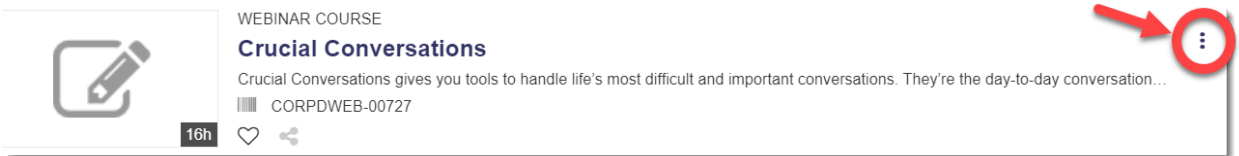
Registering Others

You can register your managed employees for training.

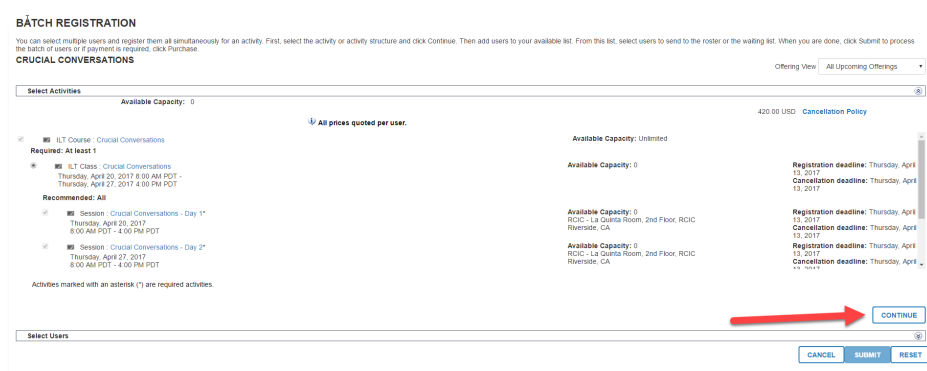
1. Locate the activity you wish to register others in by using the **Library** or **Search** for the course using the title or a keyword.



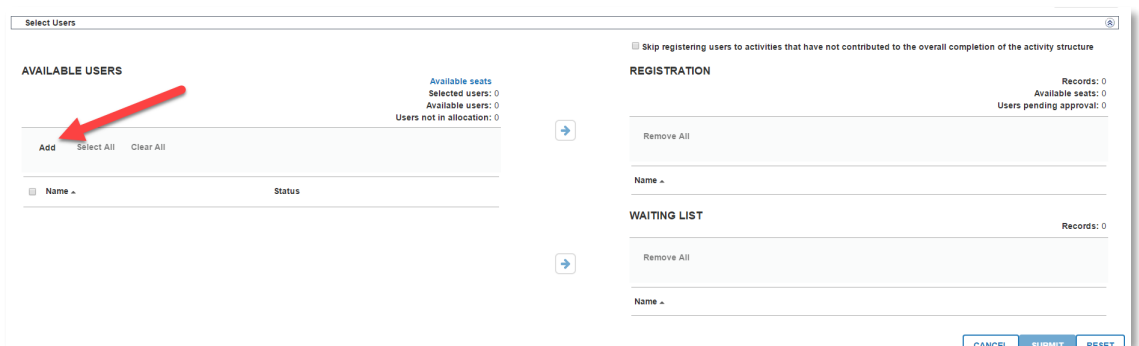
2. Once you locate the activity, click the three dots, then select **Register Others**.



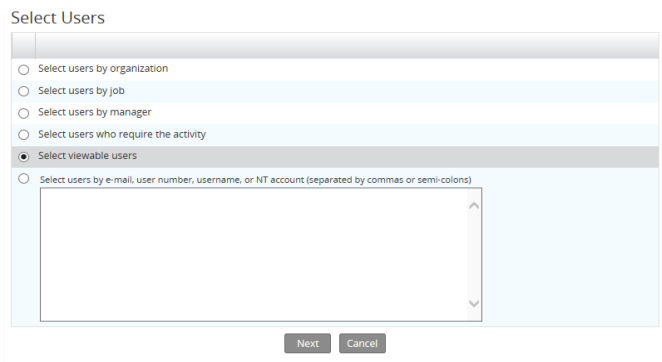
3. For an online course click **Continue** to register users. For live in-person or virtual training, first select the class date(s) you prefer then click **Continue**.



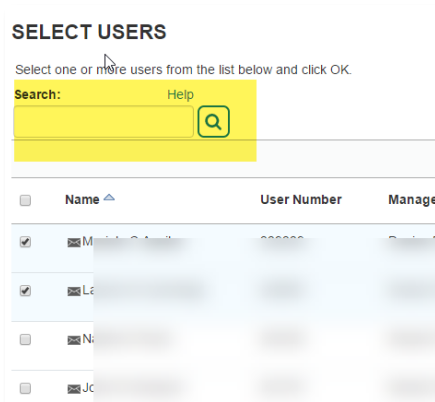
4. Click **Add** under Available Users to locate the employee(s) you wish to register.



5. From the options displayed, choose **Select Viewable Users**.

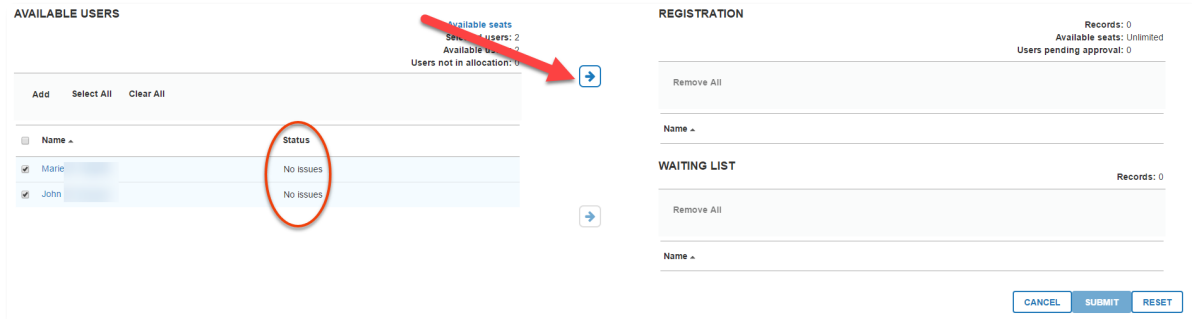


6. Click **Next**.
7. **Select Viewable Users** displays a complete list of your viewable users. You have the options to:
 - **Search** for an employee by name.
 - **Browse** the list of users for employees you wish to register.
 - **Click** Select All at the bottom of the page to select all active users or select the top box to select all users on the current page.
8. 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.

9. Click **OK** at the bottom of the screen to continue.
10. 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.



11. If you have selected someone you don't wish to register uncheck the box next to them.
12. Click the **Top Arrow** to move the selected users over to Registration.
13. 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 for assistance.

To assign training:

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

donotreply@sumtotalsystems.com

User Number: [REDACTED]

Required: 4 (4 Certifications)

Recommended: 0

81%

PROFILE ▾

4 INCOMPLETE

5. Click **Add**

Refresh + Add

Activity Name	Assignment Type	Assignment Status	Assignment Date	Due
<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.

Search

Learning Activities (194)

Filter by:

- Libraries
- Activity Type
- Facility City

Name

ABAWD (Phase 3) Training

Active Shooter (E-Learning)

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.

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:

*Priority is an optional description. Select **Manager Assigned, Job Specific**, or leave blank depending on your preference.

9. Click **Done**. An assignment notification will be sent to the employee overnight via email.