Introduction
Those who have direct reports identified in PeopleSoft will receive the Manager Role in addition to the standard Learner Role in COR Learning’s LMS. This guide only 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 schedule.
• 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 into COR Learning Center .............................................................................................................2
Navigation ...................................................................................................................................................2
Manager Dashboard ....................................................................................................................................2
View Managed Users ...................................................................................................................................3
  View Status of Assigned Training ...........................................................................................................3
Exporting Reports to Excel ..........................................................................................................................6
View Transcript ..........................................................................................................................................8
View Training Schedule ...............................................................................................................................10
Other Views ...............................................................................................................................................11
Registering Others ....................................................................................................................................12
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 Email Address (username@rivco.org) and Password and then click Sign In.

   This will be the same information you use to access your computer station and other County of Riverside systems. If you are having trouble logging in please contact your IT Help Desk.

Navigation

If you have direct reports identified in PeopleSoft, you will automatically receive the Manager role in addition to your standard Learner role.

You will see that in addition to Self icon and Library icon you will now have a My Team icon at the top of your toolbar.

By clicking the My Team button a dashboard will open on left side of your screen, with a link to your Manager Dashboard. Click Manager Dashboard to enter the Manager Mode.

Manager Dashboard

To view your Manager Dashboard:

1. Login to the COR Learning Center.
2. Click the My Team Icon and select Manager Dashboard.

When you first navigate to your Manager Dashboard you will be able to see:

- A snapshot of your current exception report, which shows the overall status of your managed users’ assigned training.
- A list of your managed users with the status of their individual assigned training.
- The names of individuals who are Past Due to take assigned training.
*Note: Your Manager Dashboard is updated nightly, so if one of your users completed assigned training after the last update, it will not appear in this view until the next update. However, the user’s training transcript and schedule are displayed in real time and will show you their latest progress.

**View Managed Users**

Your viewable users will all be displayed in tiles, you can scroll through these tiles to locate a particular individual or you can search the user by name, or sort in ascending or descending order (by name, assignment progress, etc).

You will automatically see all users you have been given access to view through PeopleSoft. If you are missing individuals you should speak to your HR team.

**View Status of Assigned Training**

There are several ways to see the status of your managed users’ assigned training. When you first enter Manager Dashboard you will see an overview of your managed users and the status of their assigned training.
1. The **Exception Report** will show you the percentage of compliance your managed users are currently at with their assigned training (this does not include training they have only registered for but that is not assigned).

2. For each individual you will see the overall status of their assigned training, by clicking the blue **Incomplete** button you will see a more detailed report.

3. The **Past Due Training** shows who is currently overdue or past their due date to complete training. Clicking the individuals name will take you to a detailed list of their assigned training.

**Assigned Training by Activity**
You can also see the activities assigned to your managed users and the overall completion listed by training.

1. Switch from the **Users** view to **Activities** to see all the activities that are currently assigned to your managed users.

2. You will see how many are still required to complete each training and the overall percentage of completion. Once a training shows no more users are required to take the training, that means your compliance is at 100 percent and all your required users have completed the training.
3. Clicking the blue **Users** button will show you who is still required to complete the training and if they have started, what their percentage of completion is. You can also register users for this training from this page but you cannot assign additional users from this page. See more about registering users.

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 users you wish to see more information about.
2. Click blue **Incomplete** button.

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 for each training and their current status.
- Their Overall Progress in completing all assigned training.
• Clicking the **Title** of a course will show you more information about the training below, including if it was assigned based on an Audience or by Manager/Training Coordinator.

• You can filter the training to show only what assignments are **Overdue**, **Expired** or what has been **Completed**.

• You will see when the information was **Last Processed** (Remember if you need real time information, their **Transcript** and **Schedule** will be in real time)

• Clicking the **Close** button will take you back to your Manager Dashboard.

### Exporting Reports to Excel

You can export data from your Manager Dashboard to Excel if you wish. You can pull reports on the assigned training status of all your direct reports or by activity, or you can pull individualized reports by each employee.

**All Users**

On your Manager Dashboard you click Export to get a Summary Report on all of your direct reports and their Assigned Training Status.

To do this:

• Click **Export**

• Click **Next**

• Click **File 1** to download the report

• Click **Ok** to exit the window
By Activities
You can do the same thing with Activities by switching to view all the activities that are assigned to your direct reports. This report will show you all of the activities that are assigned and a summary of how many users are in compliance.

To do this:

- Click Export
- Click Next
- Click File 1 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 users you wish to see more information about.
2. Click blue Incomplete button.

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 for each training and their current status.
- Their Overall Progress in completing all assigned training.
To Export this to Excel:

- Click Export
- Click Next
- Click File 1 to download the report
- Click Ok to exit the window

View Transcript

You can easily view the training transcript of a managed user to view all of their completed training.

1. Locate the individual whose transcript you wish to view.
2. Click the Profile drop down and select Training Transcript (you may have to scroll down).

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

3. You can filter the transcript by year or set it to show All
4. You will need to click the back button to return to your dashboard.
To view individual certificates of completion, simply click the certification icon.

1. This will bring up a certificate and give the option to Print or Export to PDF.

You have the option to export the full transcript or individual certificates of completion to PDF.

   1. If you choose to Export to PDF another window will appear.
   2. You must click the File link to download the PDF.
   3. Click OK to close the window.

To exit the transcript and return to your dash board, click the icon that looks like an eye and click Exit Emulation.
**View Training Schedule**

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

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

Now you can see their current training Schedule, with any current registrations and any online training they are in-progress with.

You can also see:

- **Their Calendar**: upcoming activities they are scheduled to attend.
- **Current/Upcoming Activities**: any activity in-person or online 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.

To exit this view and return to your dash board, click the icon that looks like an eye and click **Exit Emulation**.
Other Views

In addition to being able to see your direct report’s transcript and current schedule you can also use the Profile drop down button to view other items about your employee.

- **CE Requirement Analysis**: Analysis of Continuing Education credits.
- **Learner Approvals**: Any registration approvals they have made or rejected for their direct reports.
- **My Observation Checklists**: List of their observation checklists that have been approved or are pending approval.
- **Observer Checklists**: Observer Checklists that they are responsible for approving for others.
- **Self-Reported Training**: Training they have added to their profile.
- **Training Analysis**: All assigned training and their current status.
- **Training Schedule**: All current registrations or in-progress online training.
- **Training Transcript**: All past completed training.

To exit this view and return to your dash board, click the icon that looks like an eye and **click Exit Emulation**.
Registering Others
You can register others at any time.

To register managed users for training:

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

2. Go to the Select drop down and select Register Others.

3. Click Continue if this is an online course to add users. If this is an in-person training you will need to select the offering you wish them to attend first before you can click Continue.
4. Click **Add** under Available Users to locate the users you wish to register.

5. There are several options presented to narrow down the users you wish to add. However, as a Manager the only option that will be relevant is **Select Viewable Users**.

6. Click **Next**.

7. **Select Viewable Users**: presents a complete list of your viewable users.

   You have the options to:
   
   - **Type** a user’s name in the search box and click the **Arrow** button.
   - **Browse** the list of users for individuals 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 user/users name that you wish to register.
Note: If direct reports 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. The users will not be registered yet. Check to see there are “No issues” next to the users. There will be a warning if there is a conflict in their training schedule.

11. If you have accidently selected someone you don’t wish to register you can simply uncheck the box next to them.
12. Click the Top Arrow Button to move the selected users over to Registration.
13. Click Submit once all users you wish have been moved over.

Those users are now registered for the activity.

Note: If the activity is in-person they will receive an email notification of their registration. If the activity is online there may be no registration notification, so you may want to inform them they should complete the training.

Assign Training
Unlike the ability to Register users in training, Assigning Training is when you are designating training as being a requirement for a direct report and setting up some form of due date. Users cannot remove or cancel training that has been assigned to them. You cannot assign direct reports to attend training on a particular day, you can only assign them to take particular course. If the course offer in-person it will be up to you or your direct report to register in an upcoming class prior to their due date. County Mandated training is assigned to all users automatically, but there may be additional training you wish your direct reports to take. Note: Not all training is available for Managers to assign.

Training must be assigned by individual, you cannot batch assign training. If you wish to assign training to a batch of users, you should contact corlearning@rivco.org to discuss possibilities.

To assign training:

1. Login to the 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 blue **Incomplete** button.

5. **Click Add**

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.

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

7. **Click Next**
8. Here you will need to enter information about the Assignment(s).
   • If it is Required or just Recommended?
   • The Due Date
   • The Priority *
   • You can also add notes if you wish.

*Priority describes the kind of assignment you are making. Mandated training will always be assigned by Administrators. But Managers can select Manager Assigned if it is a training they wish this individual to take or Job Specific if it is a training particular to that individual’s job. This has no bearing on the assignment, it is only a label to identify the kind of assignment.

9. Click Done

The direct report will receive an assignment notification. Unlike registration notifications which go out immediately. Assignment notifications go out overnight.