SumTotal Learning Management

Getting Started Guide

Version 20.2

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Introduction

SumTotal Learning Management is a web-based application that provides you with the tools necessary for finding training, managing learning, and tracking your professional growth. Through Learning Management, you have access to a variety of learning activities, from on-site classes to self-paced online courses, as well as performance support and knowledge documents.

This introductory guide walks you through the login process, introduces you to the main user roles, and helps familiarize you with the SumTotal interface and main menus items. You won't learn everything about Learning Management—just enough to get comfortable navigating the site and exploring some key features and capabilities.

Already familiar with SumTotal?

You can check out our role-based user guides for more detailed information about finding, completing, creating, or managing learning activities and other Learning Management-related tasks.

- I'm here for training: *SumTotal Learning Management Learner Guide*
- I'm here to manage others: *SumTotal Learning Management Manager Guide*
- I'm here to instruct others: *SumTotal Learning Management Instructor Guide*
- I'm here to create and manage training: *SumTotal Learning Management Training Administrator Guide*
- I'm here to manage system settings and objects: *SumTotal Learning Management System Administrator Guide*

> ***Tip**: Don't see what you need in any of these guides? You may be looking for information on a "common" SumTotal task instead of a Learning Management-specific one, like using the Timeline or managing users. Try the SumTotal Core Platform Administrator Guide.*

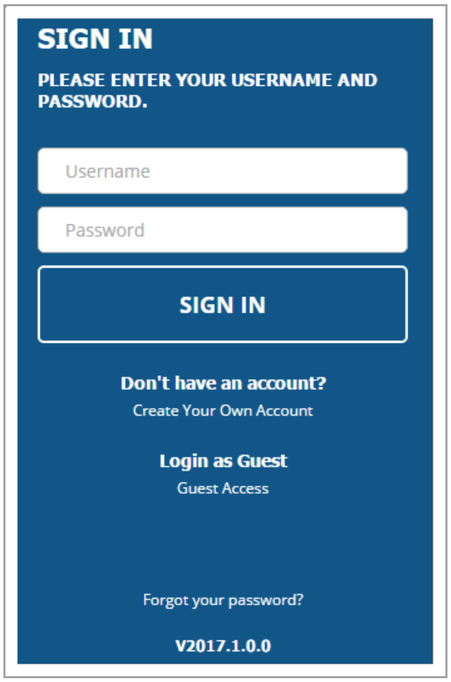
Log on to SumTotal

When you go to the SumTotal site, you're taken to the **Sign In** page.

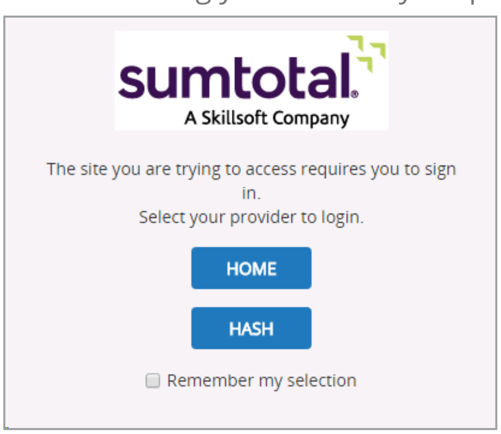
> ***Note:*** *If your company uses the mobile app, please know you can't make your first login attempt from a mobile, non-tablet device.*

Depending on your company's settings, you'll either see:

- A standard **Sign In** screen like the one below:



- A screen asking you to name your provider, like the one below:

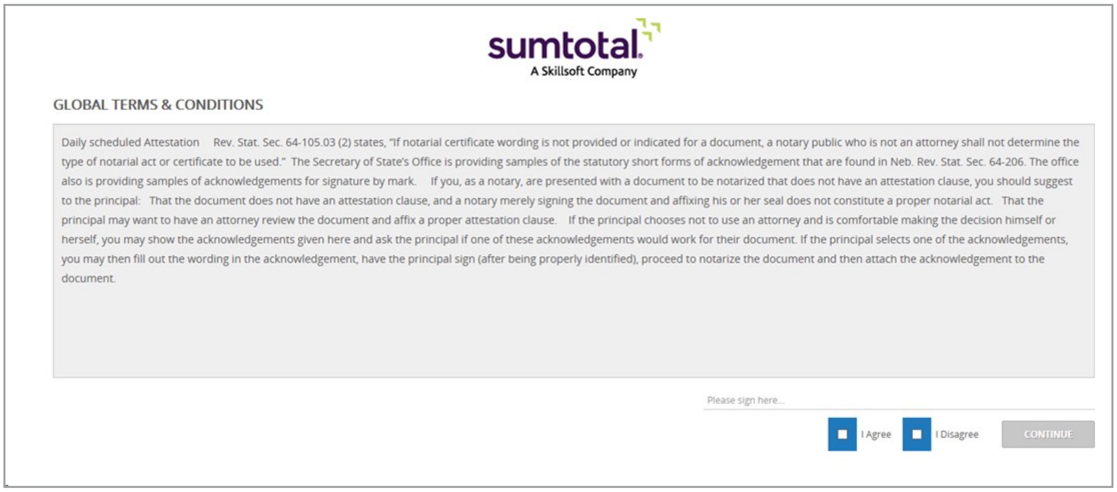


Enter your **Username** and **Password** and click **Sign In**.

You can change your password after you've successfully logged on to the system. If you forget your password, click the **Forgot your password?** link on the logon page.

Depending on company settings, after you sign in, you may also need to:

- Agree to your company's terms of service.

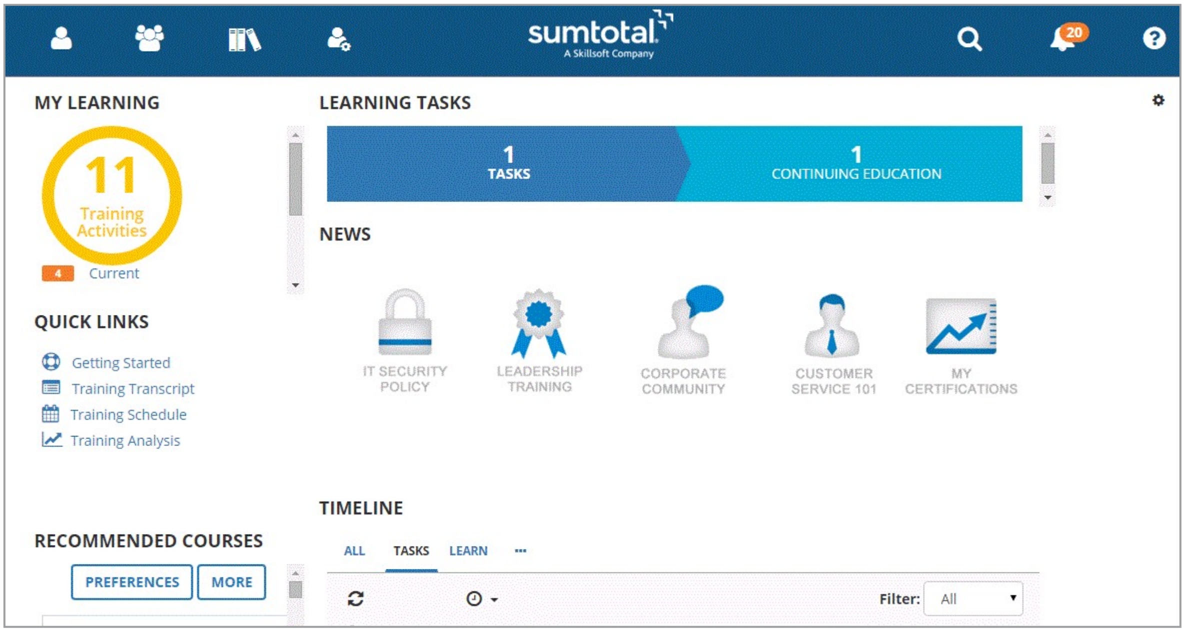


- Enter your personal security questions for password recovery.

Otherwise, SumTotal takes you to your home dashboard.

Explore the SumTotal Interface

The dashboard displays when you log in to the system.



Your dashboard contains a variety of widgets to help you quickly see your outstanding tasks, manage your training, view company news, and more. Since it's customizable, the exact widgets that display will vary by user.

Above the dashboard, you'll see a row of menu items.

The icons you see can also vary depending on your organization's settings. See the chart below for an overview. We'll talk about each item in more detail later.

Menu Item	Descriptions
Roles: Self Team Admin	These are drop-down menus that contain different pages you can access and tasks you can perform depending on if you're a learner, instructor, manager, or administrator. The role icons you can see vary based on your security permissions. See **About User Roles** (on page 9) for more.
Library	Access the Library to look for training-related information such as

Menu Item	Descriptions
	courses, knowledge documents, and so on. See **Browse the Library** (on page 13) for more.
Search	Find what you need quickly by using the Enterprise Search feature. See **Search for Items** (on page 15) for more.
Timeline	Navigate to the Timeline to view and perform actions on pending tasks. See **View Your Timeline and Alerts** (on page 18) for more.
Online Help	Use this option to get online assistance while performing various tasks in the application. See **Access the Online Help** (on page 21) for more.

About User Roles

Depending on your role in SumTotal (such as a learner or manager), you may access different pages that appear under different menus. Each role provides options for specific tasks, such as accessing your assigned training or managing your employees.

If you have permission to access features in more than one role, you can switch between these roles by choosing one of the icons in the Header menu.

The following table displays common role names, menu icons, and a brief description of what that role can do in Learning Management.

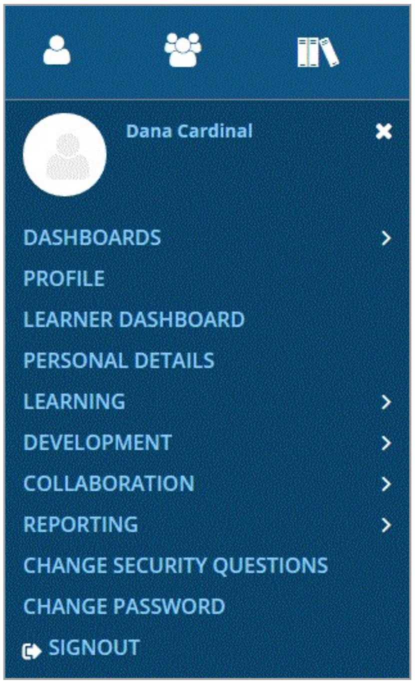
Role	Icon	Description
Learner		Learners find and complete activities such as courses, assessments, evaluations, and more. The Self menu contains pages that help you track assigned, registered, and completed training, as well as common end-user tasks, like viewing your **Profile** or **Messages**. You can also **Establish Your Preferences** (on page 11). • For instructions on learner tasks, see the *SumTotal Learning Management Learner Guide*.
Instructor		Instructors lead classes for learners. They may also approve registration requests or mark a user's training as complete. You can use the Self menu to view your **Instructor Schedule**, launch online classes, or approve registration requests. • For instructions on instructor tasks, see the *SumTotal Learning Management Instructor Guide*.
Manager		Managers are in charge of assigning and tracking their managed users' tasks. You can use the Team menu to track your users' progress from the **Manager Dashboard**, export reports about your users, or work with team development plans. • For instructions on manager tasks, see the *SumTotal Learning Management Manager Guide*.

Role	Icon	Description
Administrator		Many organizations have different types of administrators. An administrator could be in charge of managing system settings, user accounts, company resources, learning activities, or all of the above. You can use the Administrator menu to access your available administrative tasks. This includes customizing how the site looks and acts, configuring user data and security permissions, managing user resources (like notifications or social communities), creating learning activities and activity-related objects (like Library topics or on-site facilities), and more. • For instructions on managing Core-level settings and configurations (such as users or jobs), see the *SumTotal Core Platform Administrator Guide*. • For instructions on managing **Learning Management-specific system settings and resources**, see the *SumTotal Learning Management System Administrator Guide*. • For instructions on **working with learning activities**, see the *SumTotal Learning Management Training Administrator Guide*.

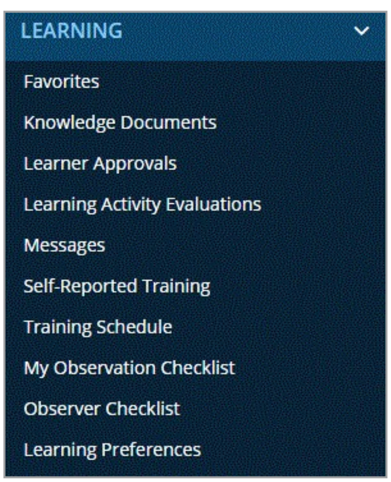
***Note**: Depending on your role, permissions, company's settings, and product licenses, you may not have access to every menu icon or option.*

Navigate the SumTotal Menus

Clicking one of the role-based icons opens a menu structure with sub-menus and role-specific pages. For example, if you click , a menu similar to the following displays on the left-hand side of the page:



Items with arrows (**>**) next to them are sub-menus. Click them to expand the category and view a list of available pages. For example:

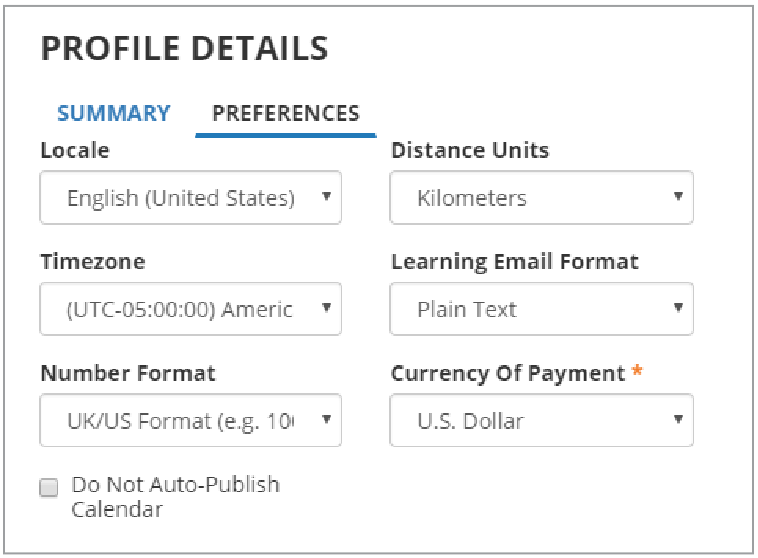


> ***Tip**: Don't know where a page is located in the menus? You can look for it using the **Navigation** search type in Enterprise Search. See **Search for Items** (on page 15) for more.*

Establish Your Preferences

SumTotal allows you to arrange how you will see and access information on the site. Once you access the site, you should immediately set your preferences to ensure that you have quick access to the information you need.

1. In the Header menu, click .
2. Click **Profile Details**.
3. Click the **Preferences** tab.



4. Select your **Locale**. This determines your system language, date format, and time format.
5. Select your preferred **Distance Units,** such as miles or kilometers.
6. Select your **Time Zone**.
7. Select the **Learning Email Format** of your Learning Management notifications (for example, in HTML or plain text).
8. Select your preferred **Number Format** (for example, 100,000.00 or 100.000,00).
9. Select your preferred **Currency of Payment**. When you view activities with a cost in the SumTotal Learning Management Library, the cost will appear in your preferred currency.
10. Select whether to **Auto-Publish Calendar**. If this option is not selected, scheduled training events that you register for are automatically added to your Microsoft Outlook calendar, and you receive email reminders to attend these events.

***Note**: Your organization may restrict the use of ActiveX controls, preventing the use of the auto-publish feature. In such cases, you can publish your appointments to Outlook manually.*

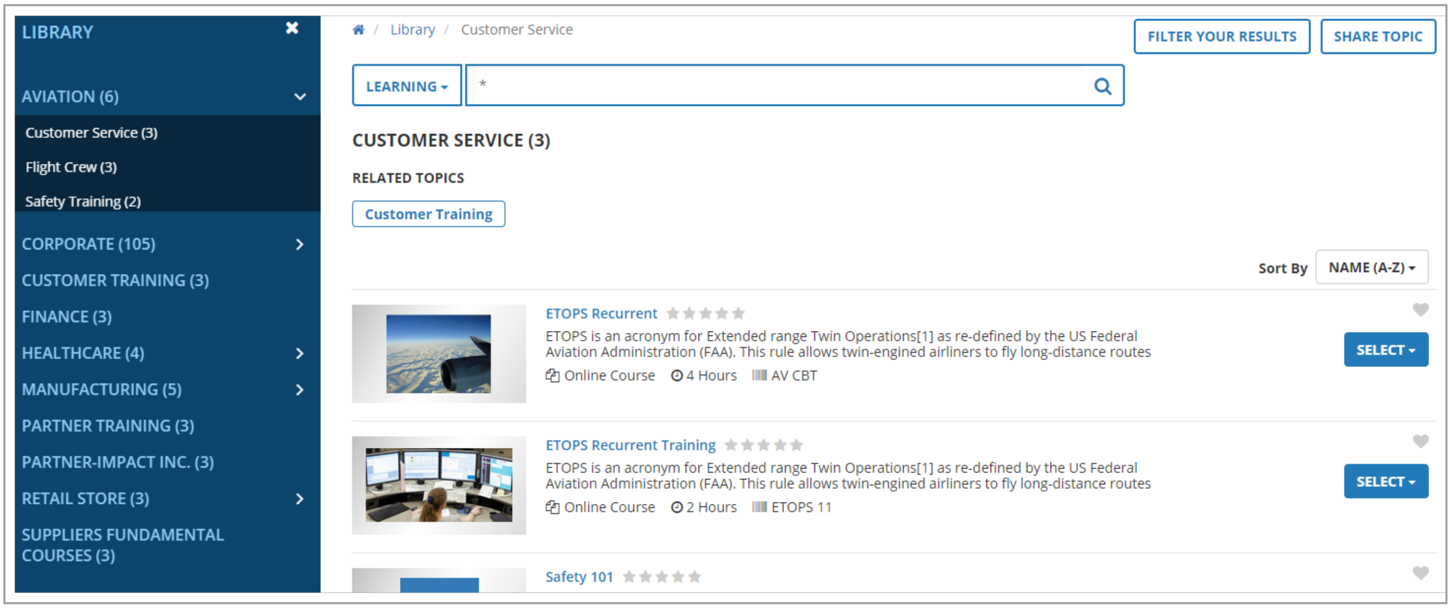
11. Click **Save**.

If you change the time zone setting, the system will adjust the times for your scheduled training to match the new time zone setting.

Browse the Library

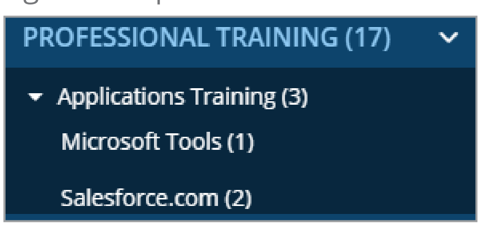
The Library is a collection of learning activities organized by topic. You can use it to find new training that relates to your interests.

The Library is most useful if you're interested in a particular subject or are just browsing to see what sort of training looks helpful to you. If you're looking for a specific activity, you may want to **Search for Items** (on page 15) instead.



Once you open the Library by clicking , you can:

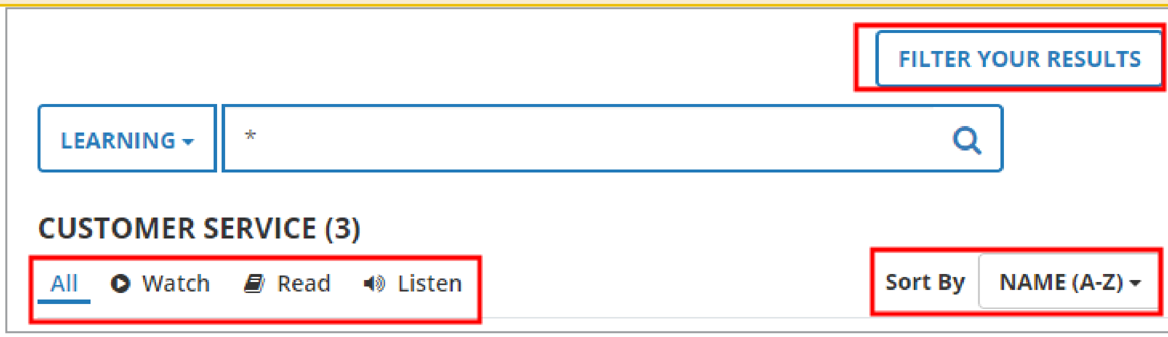
- Use the **Search** box to look for activities with specific keywords.
- Use the left-hand panel to browse by topic. If there's an arrow (>) next to a topic title, click it to expand a list of subtopics. When you click on a topic, its activities automatically display in the right-hand panel.



You may also want to:

- **Filter Your Results** (such as by Activity Type or Duration). Click **Apply** to update the list of results.
- Use the **Sort By** drop-down to change how the activities are sorted. They're listed in alphabetical order (Name A-Z) by default
- If you see "modality" tabs (such as **Read**, **Watch**, or **Listen**) above the list of activities, you can click one to narrow your selection based on how you interact with the activity. Your company can customize the modalities that display, so your list may not look the same as the one below.

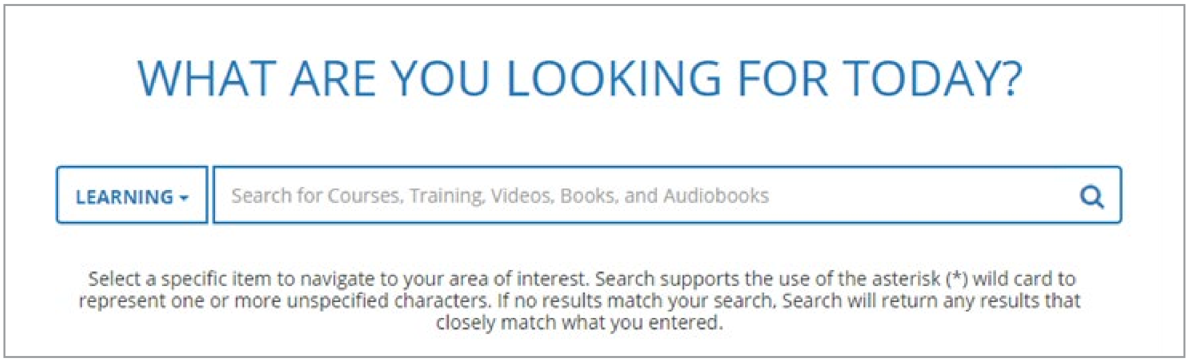
Note: *If your organization hasn't set modalities for learning activities, then you won't see the tabs at all.*



- *Want to know more about the Library? See the SumTotal Learning Management Learner Guide.*

Search for Items

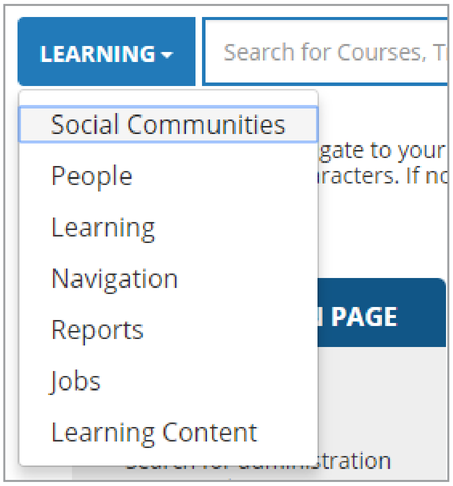
The Search icon displays at the top of all SumTotal pages. Clicking it takes you to the **Search** page.



Use the drop-down next to the **Search** box to specify what you're looking for. Depending on your company's settings, you may see one or more of the following options:

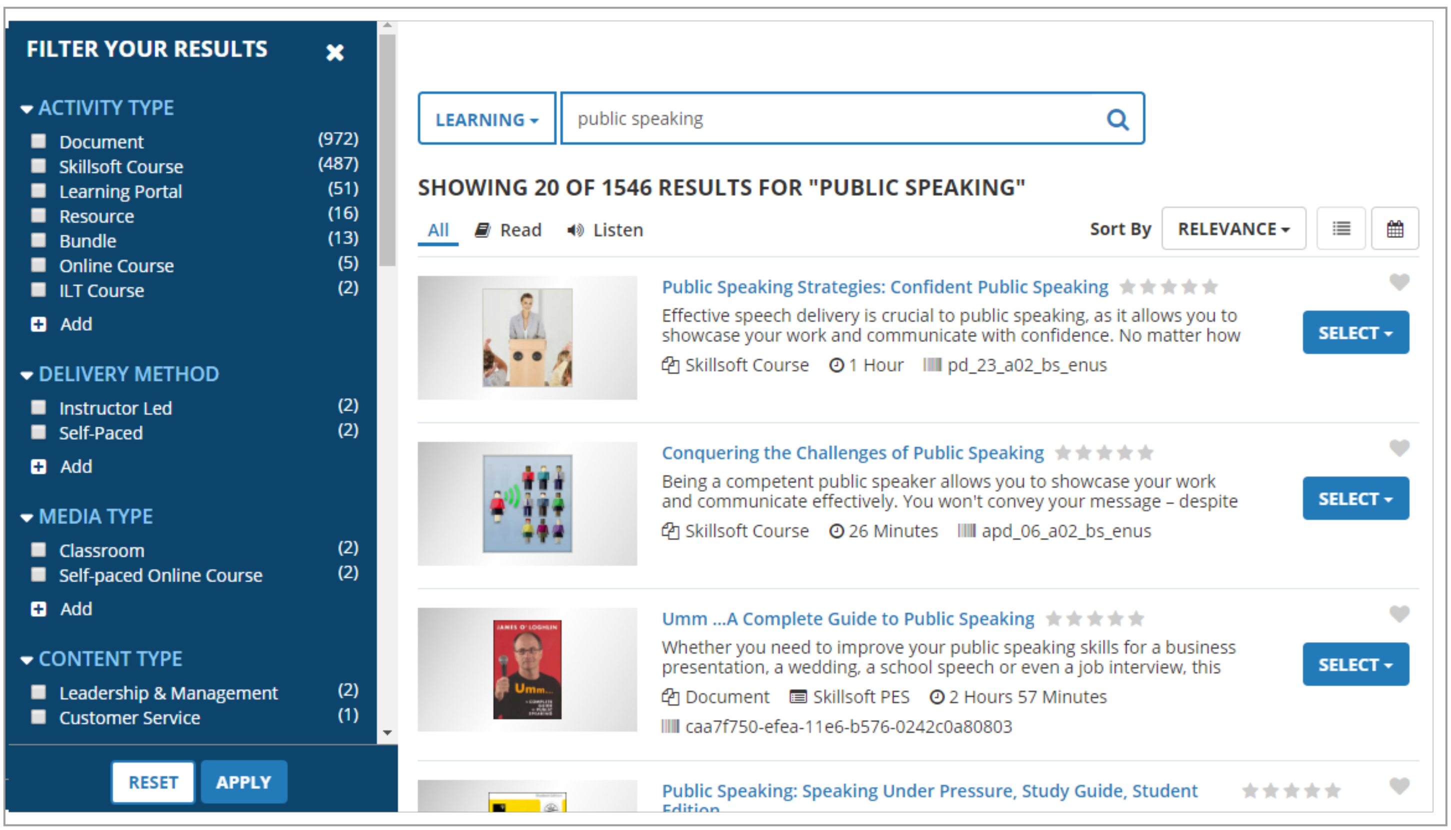
- **Navigation:** Search for menu items and pages within SumTotal (like **Profile** or **Training Schedule**). Click **Navigate** to go directly to the page.
- **kPoint Content (kPoint integrated users only)**: Search for videos hosted in kPoint.
- **People**: Search for employees.
- **Learning**: Search for learning activities.
- **Learning Content (Skillsoft OLSA integrated users only)**: Search for Skillsoft OLSA Books, Videos, Job Aids, and SkillBriefs.
- **Reports (Advanced Reporting users only)**: Search for Reports, Ad Hoc Views, or Domains.
- **Jobs (Talent Acquisition users only)**: Search for jobs.
- **Social Communities**: Search for communities.

> ***Note:*** *If you don't have access to a search type, you won't see it listed.*



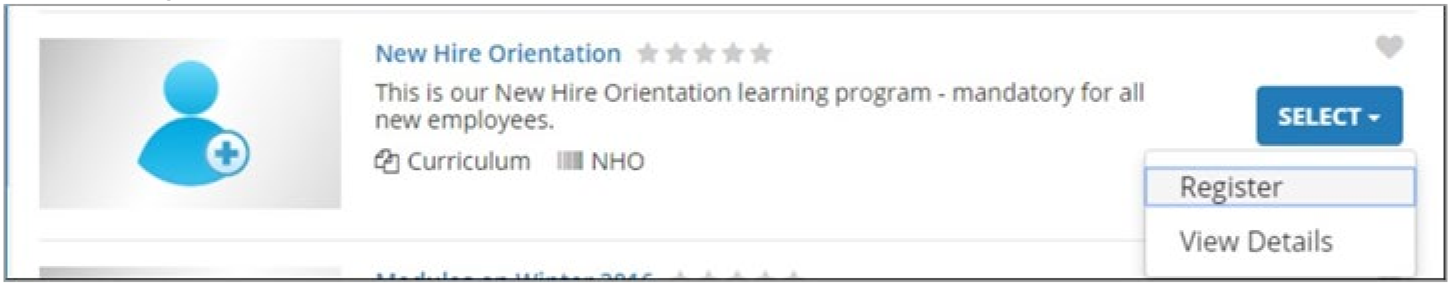
Once you've selected your search type, enter your keywords in the **Search** box and click **Enter**.

Enterprise Search tailors your results to your role and permissions. So, for example, only users with administrative permissions receive results related to administrator menu items.



From here, you can use filters and other sort options to narrow your selection until you find what you're looking for. Once you do, use the split-button to perform actions on it. For learning activities, you'll probably want to:

- **View Details** to see learn more about it.
- **Register** for the activity if it requires registration. If it doesn't, you can click **Start** to launch it right away.



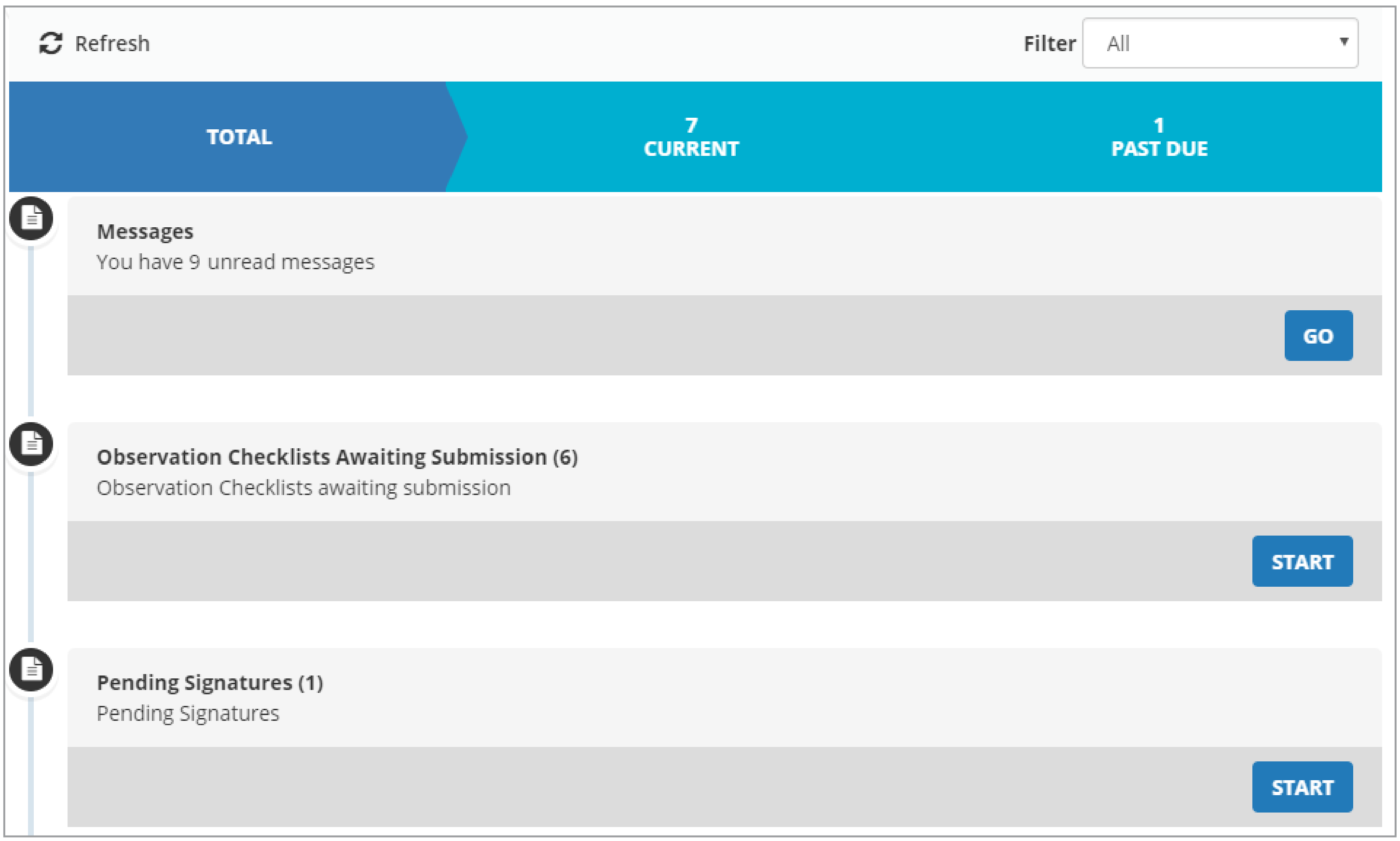
- *Want to know more about using Enterprise Search? Check out the SumTotal Learning Management Learner Guide.*

View Your Timeline and Alerts

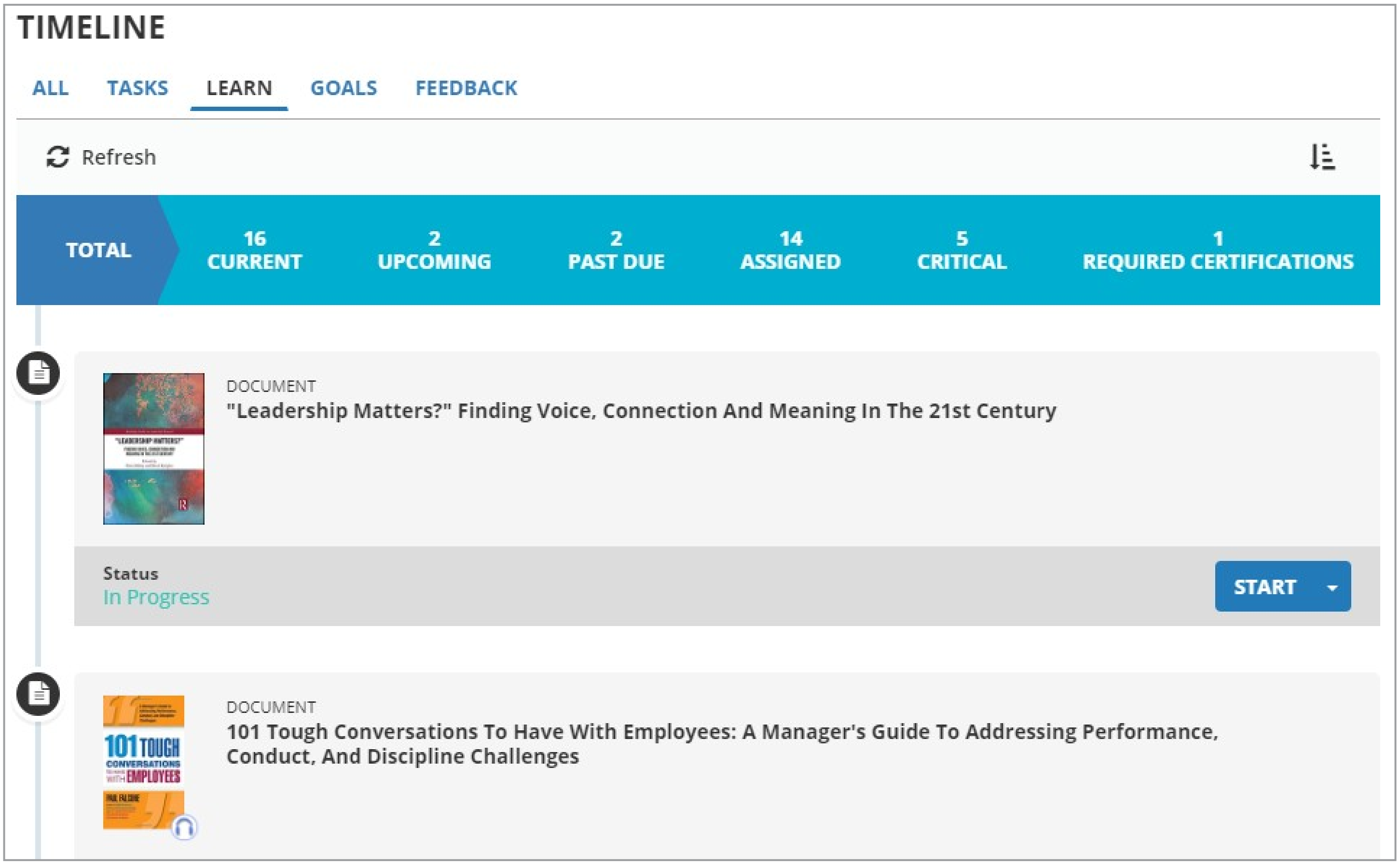
You can quickly view and complete any unfinished (current, overdue, or upcoming) tasks using the Timeline. To open your Timeline, click in the Header menu (the number on this icon shows how many past due tasks you need to accomplish).

The tabs you'll see vary depending on your user role and the features your company uses. Since this guide is focused on Learning Management, we'll just give you a brief overview of the **Tasks** and **Learn** tabs.

- *Want to know more about the Timeline? See the SumTotal Core Platform Administrator Guide.*



The **Tasks** tab lists general "to-do" items, like unread **Messages** or pending approvals. You can use the ribbon at the top of the tab to only see items that are **Current**, **Upcoming**, or **Past Due**. Clicking the action button (**Start** or **Go**) takes you to the page where you can complete the task.



The **Learn** tab lists the assigned and registered activities that you haven't yet completed. You can see basic details about the activity, as well as its **Status** (such as "In Progress" or "Past Due") under its name. Use the split-button to perform actions like **Start**, **Register**, or **View Details**.

You can use the ribbon at top of the tab to narrow the list based on the following:

View	Description
Total	All training information.
Assigned	Assigned training activities.
Critical	All the critical training that a learner needs to take, such as: • Registered training • Assigned training • An activity (such as a certification) with an expiration date

View	Description
Current	Current training activities in Registered and In Progress statuses.
Required Certifications	Required and In Progress certifications you need to complete.
Upcoming	Upcoming assigned or registered training activities.
Past Due	Overdue training activities.

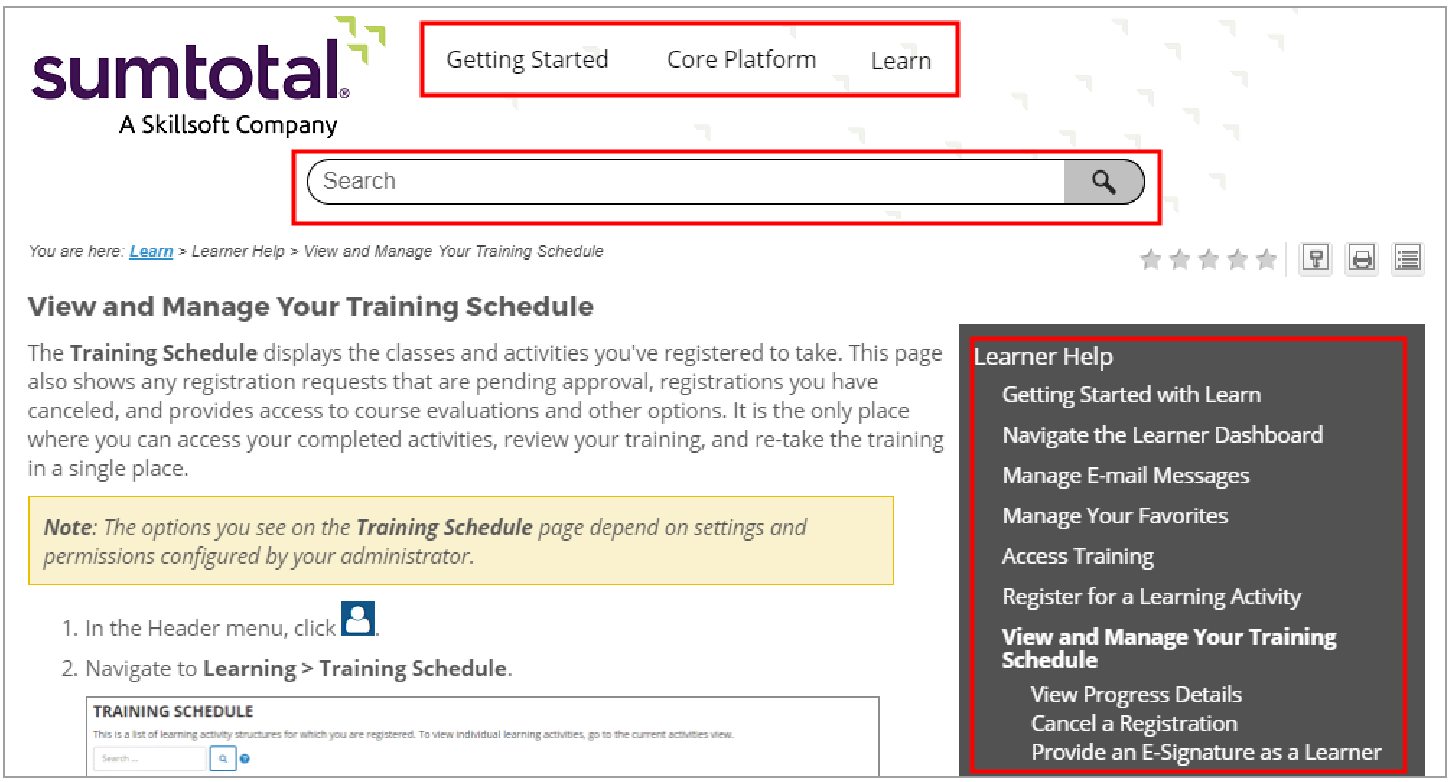
Tip*: Still seeing tasks you just completed on the Timeline? Click* ***Refresh*** *at the top of the tab to update the list.*

Access the Online Help

Our online user assistance has detailed information about the tasks you can complete. Log into your SumTotal site and click the Help icon in the upper-right hand corner to access fully integrated help. (Don't worry, it'll open in a new tab or window so you don't lose your place.)

To find other topics, you can:

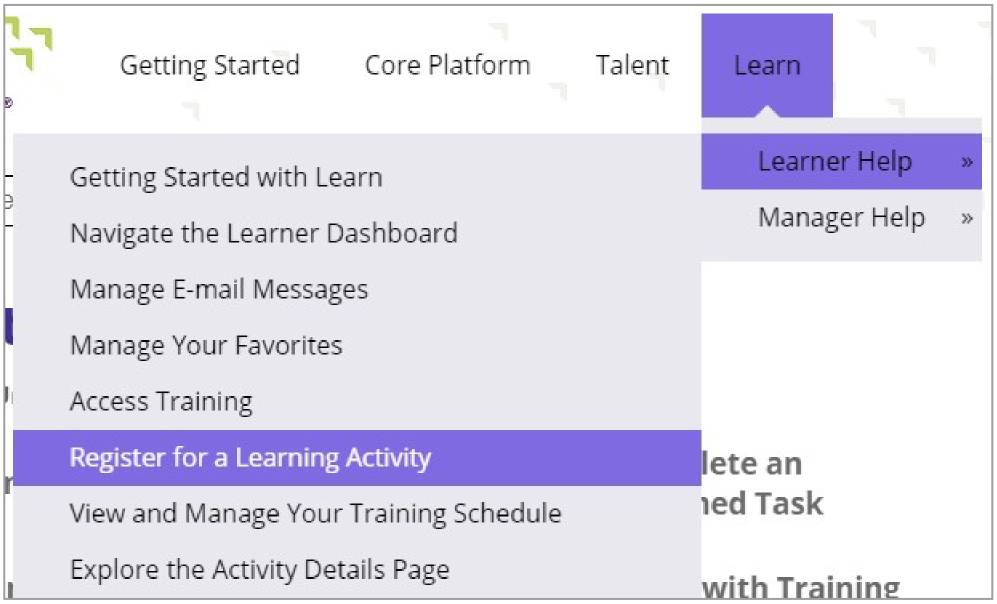
- Enter keywords in the **Search** box
- Use the top drop-down navigation menus
- Click an option in the right-hand table of contents



> ***Tip**: If you're a learner or manager, we recommend clicking **Getting Started** in the top menu bar to walk through an overview of the site.*

The Help's topics and navigation menus change depending on your user role and what products your company has. For example, if you're a learner, you won't see administrative Help topics.

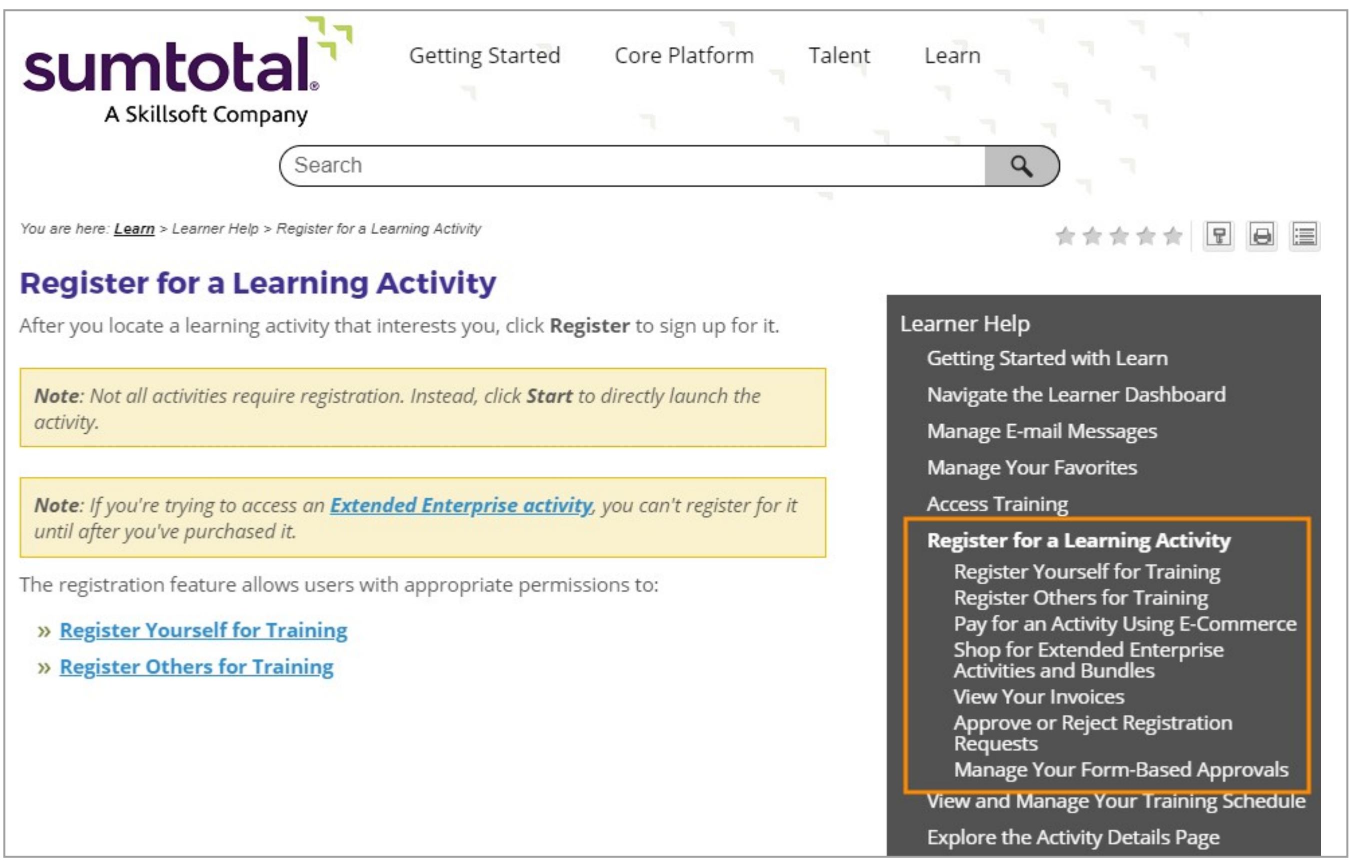
When you hover over one of the navigation menu items (like **Learning Management**), a list of Help books displays. Hover over one of these to pull up a list of parent topics, then click on a parent topic to go to that Help page.



When you go to a new topic, the right-hand table of contents updates:

- The topic you're currently accessing changes to **bold**.
- All other same-level topics and any immediate subtopics for the topic you're accessing display.

For example, if you clicked on **Register for a Learning Activity**:



Additional Information

In addition to our context-sensitive online Help, we also offer a variety of user guides on SumTotal Connect. Some of these are specialized for specific topics or workflows, while others cover more general processes.

If you'd like more information on working with SumTotal Learning Management, we recommend starting with our standard role-based user guides:

- **Learners**: *SumTotal Learning Management Learner Guide*
- **Managers**: *SumTotal Learning Management Manager Guide*
- **Instructors**: *SumTotal Learning Management Instructor Guide*
- **Administrators**:
    - Training administrators: *SumTotal Learning Management Training Administrator Guide*
    - System administrators:
        - *SumTotal Core Platform Administrator Guide*
        - *SumTotal Learning Management System Administrator Guide*