

Administrators Guide:

How to Manage Assignments in SumTotal



UCSF Medical Center

Learning & Organizational Development

3360 Geary Blvd. Rm. 246

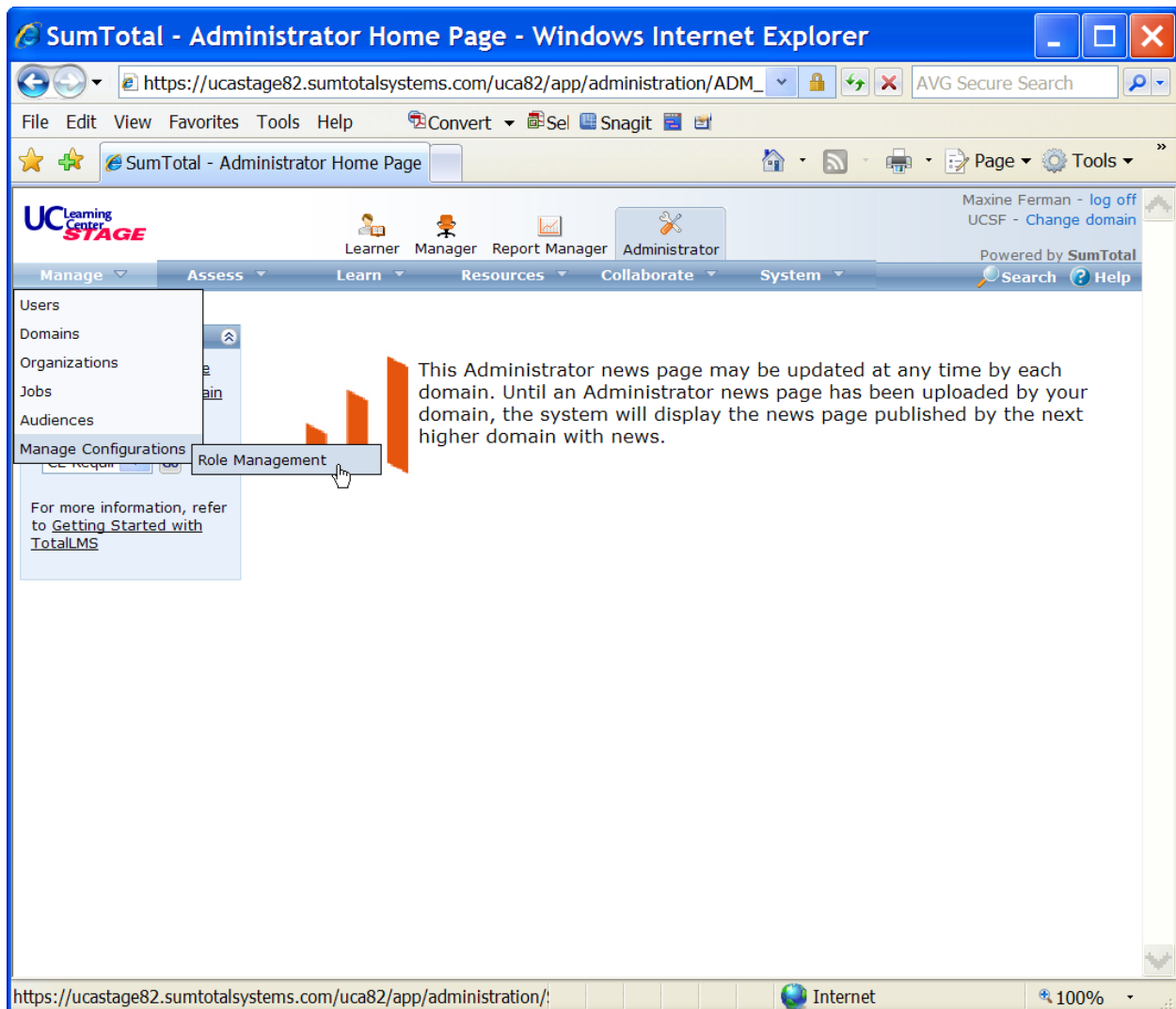
San Francisco, CA 94118

Prep NOTES for LMS:

Developers: Administrator Mode

To activate Assign Managers globally, the following settings must be changed in Production:

1. **SELECT Manage**
2. **SELECT Manager Configurations**
3. **SELECT Role Manager**



4. SELECT the PENCIL next UC Manager

UC Learning Center STAGE

Learner Manager Report Manager Administrator

UCSF - Change domain

Powered by SumTotal

Manage Assess Learn Resources Collaborate System Search Help

Home > Manage - Manage Configurations - Role Management

Role Management

List of roles contained in the currently selected domain.

Search: [Help](#)

View: Roles in current working domain

1 2 NEXT >

Task: Create new role based on an existing role Records: 15

	Role ^	Default Role	Domain	Inherited From Parent	Status
<input type="radio"/>	Senior UC Domain Administrator	No	UCSF	No	Active
<input type="radio"/>	System - Guest Account (Global...	No	UCSF	Yes	Active
<input type="radio"/>	TestManager1	No	UCSF	No	Active
<input type="radio"/>	UC Domain Administrator	No	UCSF	Yes	Active
<input type="radio"/>	UC Learner	Yes	UCSF	No	Active
<input checked="" type="radio"/>	UC Manager	No	UCSF	No	Active
<input type="radio"/>	UC Training Coordinator	No	UCSF	No	Active
<input type="radio"/>	UC Vendor	No	UCSF	No	Active
<input type="radio"/>	UCSF Apex Change Controller	No	UCSF	No	Active
<input type="radio"/>	UCSF APEX INSTRUCTOR VIEW ONLY ...	No	UCSF	No	Active

Task: Create new role based on an existing role Records: 15

1 2 NEXT >

Role Properties

5. CLICK to expand **Learner and Manager**

Home > Manage - Manage Configurations - Role Management > Role Properties

Role Properties

UC Manager

Modify the information below to update the role.

General

Name:*
UC Manager

Domain:*
UCSF

Available in all child domains

Active Default role

Description:
System default role for Managers (edited for UCSF)

Permissions

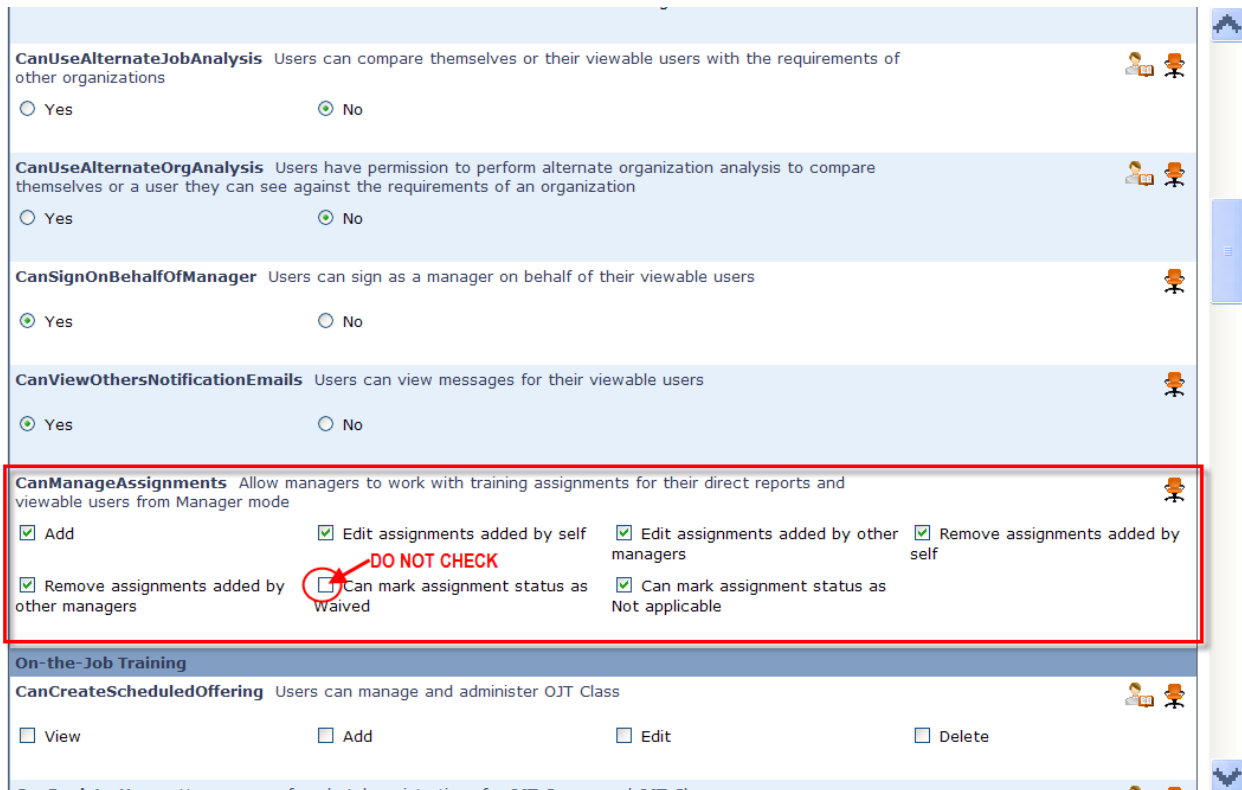
Global	⌵
Learner and Manager	⌵
Content Manager and Author	⌵

6. SCROLL down to **CanManageAssignments**

7. CLICK:

- **Add**
- **Edit assignments added by self**
- **Edit assignments added by other managers**
- **Remove assignments added by self**
- **Remove assignments added by other managers**
- **Can mark assignment status as Not applicable**

IMPORTANT: DO NOT CHECK "Can mark assignment status as Waived"



NOTES:

CanManageAssignments

Use this permission to allow managers to work with training assignments for their direct reports and viewable users from Manager mode. Ensure you enable the following options of this permission:

- **Add**- for users to add activity assignments for learners.
- **Edit assignments added by self**- for users to edit assignments that they have added.
- **Edit assignments added by other managers**- for users to edit assignments that other managers have added.
- **Remove assignments added by self**- for users to remove assignments that they have added.

- **Remove assignments added by other managers-** for users to remove assignments that other managers have added.
- **DO NOT mark assignment status as “waived”-** . The LMS has **NOT** enabled this option.
- **Can mark assignment status as “not applicable”-** to mark a user as not applicable for an activity. You can enable this option for activities, certifications and versional activities.

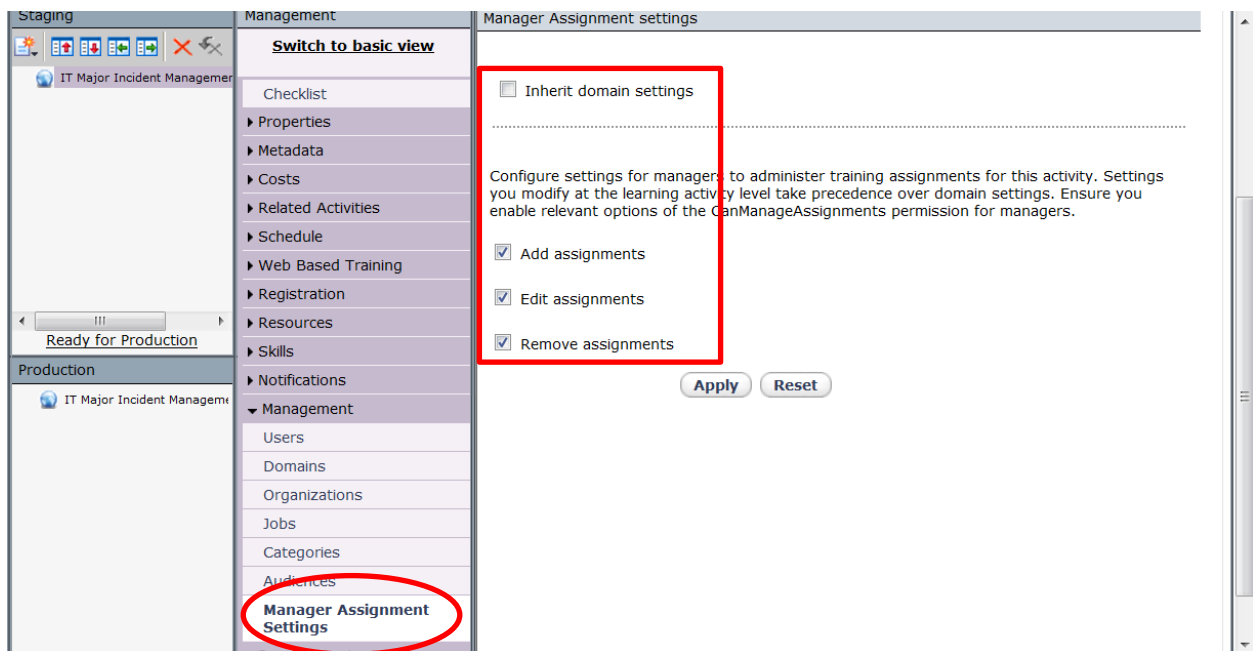
Note: If you do not select the **‘Not applicable’** assignment status in the Manager Assignment Settings under Domain Settings, this assignment status option will not be visible during activity assignments.

Developers: Administrator Mode - Manager Assignment Settings

NOTE: This must be done for **EACH** eCourse uploaded into the LMS

When setting the **Properties** for a new course in the **Administrator Mode**, complete the following:

1. **SELECT Management**
2. **SELECT Manager Assignment Settings**
3. **DESELECT Inherit domain Settings**
4. **CLICK Add assignments**
5. **CLICK Edit assignments**
6. **CLICK Remove assignments**
7. **CLICK Apply**



Developers: Administrator Mode - Notifications

To insure assigned users receive an email notification when the Manager assigns the eCourse:

1. **SELECT Notifications**
2. **SELECT System**
3. **SEARCH** for the word **“assignment”**
4. **CLICK** the checkbox next to **Learning Activity Assignment Notification**
5. **CLICK** the **Go** button next to **Task | Activate notification**

The screenshot shows the UC Learning Center STAGE Administrator interface. The user is logged in as Maxine Ferman. The page title is "Learning Activity Properties". The left sidebar shows the "Notifications" section selected. The main content area displays a table of notification templates. The "Learning Activity Assignment Notification" row is highlighted in red, and the "Go" button next to the "Activate notifications" task is circled in red.

Notification Name	Notification Template	Template Type	Inherit Settings	Status
<input type="checkbox"/> Learning Activity Assignment Change Notification	Learning Activity Assignment Change Template	Activity - Assignment Change	Yes	Inactive
<input checked="" type="checkbox"/> Learning Activity Assignment Notification	IT Major Incident Management	Activity - Assignment	No	Active
<input type="checkbox"/> Learning Activity Assignment Overdue Notification	Learning Activity Assignment Overdue Template	Activity - Assignment Overdue	Yes	Inactive
<input type="checkbox"/> Learning Activity Assignment Reminder Notification	Learning Activity Assignment Reminder Template	Activity - Assignment Reminder	Yes	Inactive
<input type="checkbox"/> Learning Activity Assignment Removal Notification	Learning Activity Assignment Removal Template	Activity - Assignment Removal	Yes	Inactive
<input type="checkbox"/> Learning Activity Assignment Warning Notification	Learning Activity Assignment Warning Template	Activity - Assignment Warning	Yes	Inactive

When all Property settings are complete, move course into Production

Managers: Manager Mode – Manage Assignments

How to assign an eCourse to your direct reports

1. **SEARCH** for the eCourse in the LMS
2. **SELECT** course from **Activity** list
3. **CLICK Other Actions**
 - a. **SELECT Manage Assignments**

The screenshot shows a web browser window displaying the SumTotal LMS search results. The search criteria is 'it major', and 5 results are found. The results table is as follows:

Activity Name	Activity Type	Start Date
Blood Borne Pathogen Training	eCourse	
CHR210A Introduction to Hyperspace Configuration	eCourse	
First Receivers Training (initial 8 hour)	ILT Course	
IT Major Incident Management Process	eCourse	
Process Improvement Workshop	ILT Class	

The 'IT Major Incident Management Process' eCourse is selected, and its details are shown below. The 'Other Actions' menu is open, and 'Manage Assignments' is highlighted. The menu options are: Cancel Registration, Register Others, **Manage Assignments**, View Activity Details, and Add To Favorites.

IT Major Incident Management Process

Description: The IT Major Incident Management Process eCourse presents the key steps Major Incident in our environment.

Categories: Technology, Systems and Software

Training Organization: UCSF

Content Type: Technology, Systems and Software

Media Type: eLearning

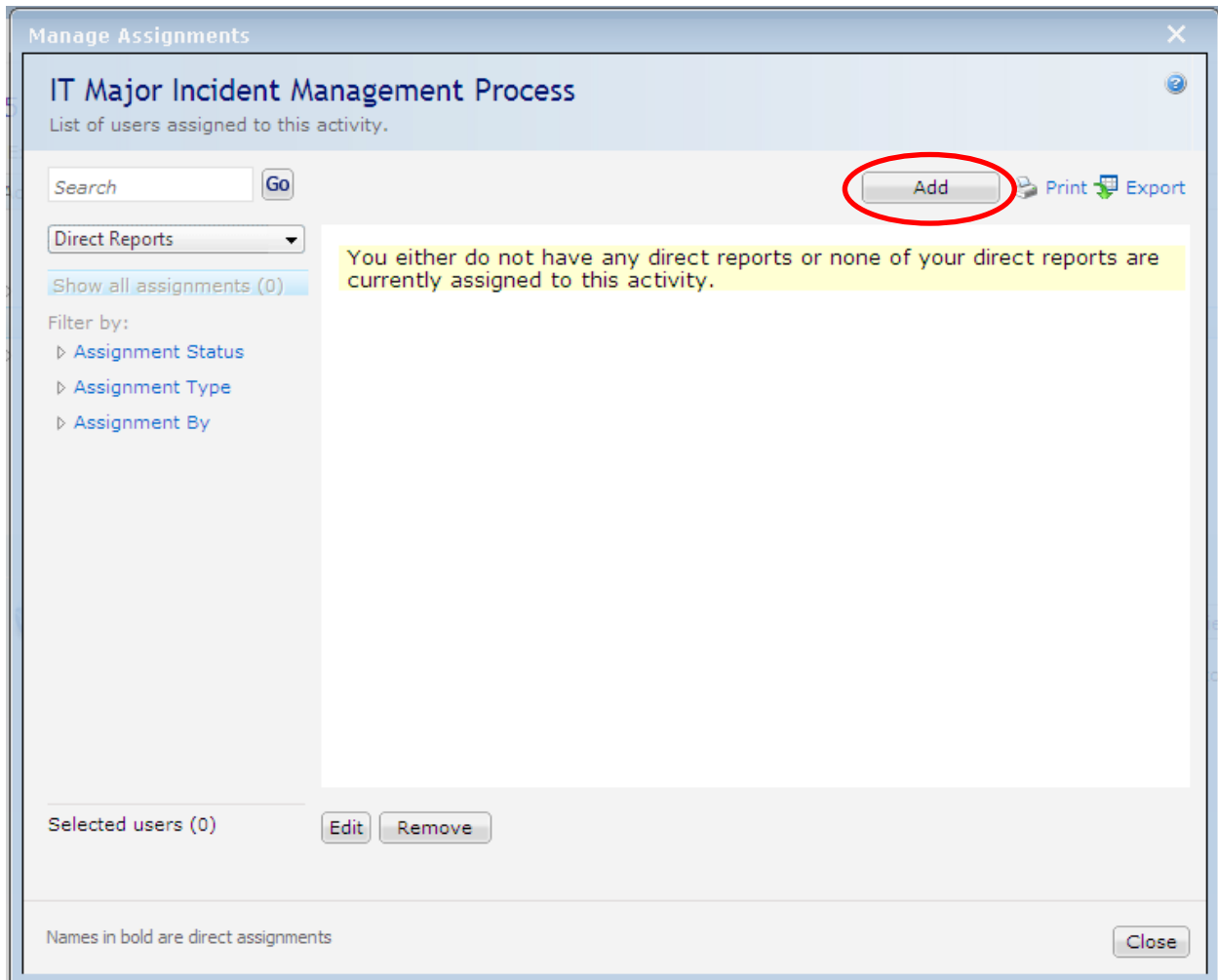
Publish Date: Monday, November 26, 2012 1:39:18 PM ...

Status: In Progress

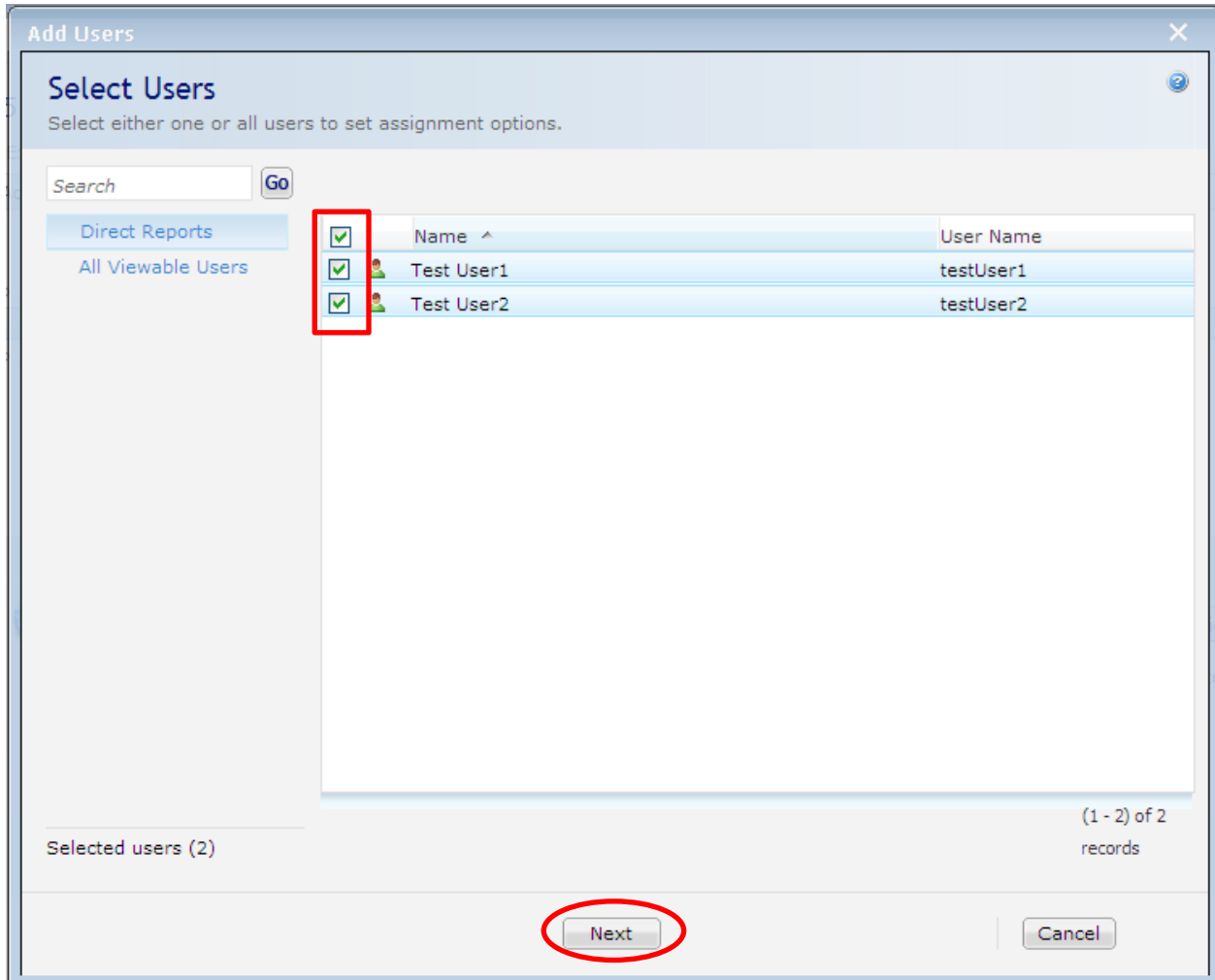
Cost Information: View Details

How to Add Users

1. **CLICK** the **Add** button



2. **CLICK** the Checkbox(s) for the Direct Reports you wish to assign the eCourse
3. **SELECT** the **Next** button



Assignment Options

1. **SELECT** the **Assignment Options** that you wish to set for the eCourse:

- Type
- Due Date
- Priority
- Status
- Assignment Notes

Edit Assignments

IT Major Incident Management Process

Select either one or all users to set assignment options.

Select: All | None Sort by: Name

Test User1 Type:Recommended Status:Assigned Due Date:No Due Date	✕
Test User2 Type:Recommended Status:Assigned Due Date:No Due Date	✕

Assignment Options:
Selected users (2)

Type:
 Required
 Recommended

Due Date:
 No Due Date
 Within Days
 By

Priority:
None ▾

Status:
Assigned ▾

Assignment Notes:

Apply to selection

Back Done Cancel

2. **CLICK** the **Apply to selection** button
3. **CLICK** the **Done** button

Edit Assignments

IT Major Incident Management Process
Select either one or all users to set assignment options.

Select: All | None Sort by: Name

Test User1 Type: Recommended Status: Assigned Due Date: No Due Date	✕
Test User2 Type: Recommended Status: Assigned Due Date: No Due Date	✕

Assignment Options:
Selected users (2)

Type:
 Required
 Recommended

Due Date:
 No Due Date
 Within 1 Days
 By 11/27/2012

Priority:
High

Status:
Assigned

Assignment Notes:

Apply to selection

Back **Done** Cancel

You have successfully assigned users

Manage Assignments

IT Major Incident Management Process

List of users assigned to this activity.

Search

Direct Reports Filter by:

- Assignment Status
 - Assigned (2)
- Assignment Type
- Assignment By

<input type="checkbox"/>	Name ^	User Name	Due date
<input type="checkbox"/>	Test User1	testUser1	-
<input type="checkbox"/>	Test User2	testUser2	-

You have successfully assigned 2 users to the activity.

Selected users (0) (1 - 2) of 2 records

Names in bold are direct assignments

User Notifications:

1. User will see the assigned eCourse in the **To Do** section of their Home page in the LMS

To Do

Training Activities

Activities related to your training

Display: All Training

Activity Name	Action	Assignment Type	Start Date	Due Date	Status
IT Major Incident Management Pr...	Start →	Recommended		12/6/2012	Assigned

(1-1) of 1 records

IT Major Incident Management Process

Type: eCourse
Description: The IT Major Incident Management Process eCourse presents the key steps taken when responding to a Major Incident in our environment.

View Details Other Actions

2. User will receive an email notification for each assigned eCourse.

Search Inbox (Ctrl+E)

Categories	From	Subject	Received	Size
Date: Today				
✉	admin@uca.com	IT Major Incident Management Process eLear...	Wed 12/...	14 ...
✉	admin@uca.com	IT Major Incident Management Process eLearnin...	Wed 12/5...	15 KB
✉	admin@uca.com	IT Major Incident Management Process eLear...	Wed 12/...	14 ...

IT Major Incident Management Process eLearning assigned to MaxManager Minion2

admin@uca.com

Sent: Wed 12/5/2012 4:49 PM

To: Ferman, Maxine

The following activity is now assigned to MaxManager Minion2.

Course Name: IT Major Incident Management Process
Due Date: 12/6/2012
Personalized Link: http://ucastage82.sumtotalsystems.com/uca82/a.aspx?p=MaxManagerMinion2*121583

Course Description: The IT Major Incident Management Process eCourse presents the key steps taken when responding to a Major Incident in our environment.

System requirements for the UC Learning Center:
-PC (XP, Vista) users: IE6 (XP only), IE7, IE8, Firefox 3.6, Firefox 4.0
-PC (Win 7) users: IE8, IE9, Firefox 4.0
-MAC users: If using OS X (10.4) Tiger - Firefox 3.6, Firefox 4.0, Safari 4.0
-MAC users: If using OS X (10.5) Leopard - Safari 4.0

admin@uca.com