

UCSF Managers: How to Manage Assignments in SumTotal

The purpose of the Manage Assignments feature in the UC Learning Center Learning Management System (LMS) is to allow Managers to assign eCourses to direct reports.

Benefits for Managers to assign to employees in the LMS include:

- Allow Managers to track and monitor the progress and completion of assigned eCourses.
- Allow Managers to give deadlines, or due dates for completion of an eCourse.
- Managers can create their own reports.



Learning & Organizational Development

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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

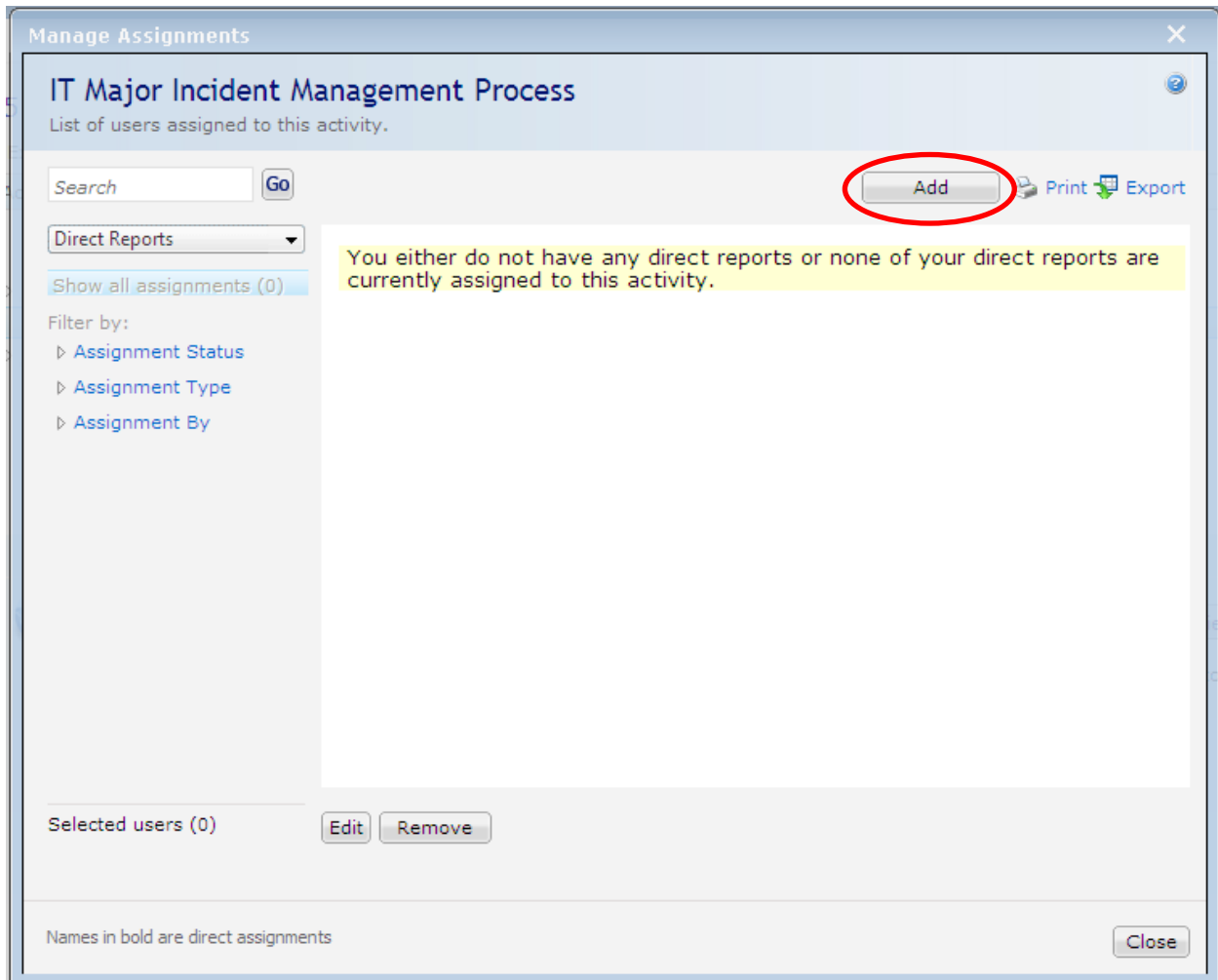
Publish Date: Monday, November 26, 2012 1:39:18 PM ...

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

The screenshot shows a software window titled "Add Users" with a sub-header "Select Users". Below the sub-header is the instruction "Select either one or all users to set assignment options." There is a search bar with a "Go" button. On the left, there are two tabs: "Direct Reports" (selected) and "All Viewable Users". A table lists two users, "Test User1" and "Test User2", both with their checkboxes checked. A red box highlights these checkboxes. At the bottom, the "Next" button is circled in red, and the "Cancel" button is also visible. The status bar at the bottom indicates "Selected users (2)" and "(1 - 2) of 2 records".

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

Assignment Options

1. **SELECT** the **Assignment Options** that you wish to set for the eCourse:
 - Type
 - Due Date
 - Priority
 - Status
 - Assignment Notes

The screenshot shows a software interface titled "Edit Assignments" for the "IT Major Incident Management Process". The interface includes a list of users and a panel for configuring assignment options. The "Assignment Options" panel is highlighted with a red box and contains the following settings:

- Assignment Options:** Selected users (2)
- Type:** Required, Recommended
- Due Date:** No Due Date, Within [] Days, By []
- Priority:** None
- Status:** Assigned
- Assignment Notes:** []

Buttons at the bottom of the dialog include "Back", "Done", and "Cancel". An "Apply to selection" button is located below the "Assignment Options" panel.

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 Days
 By

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