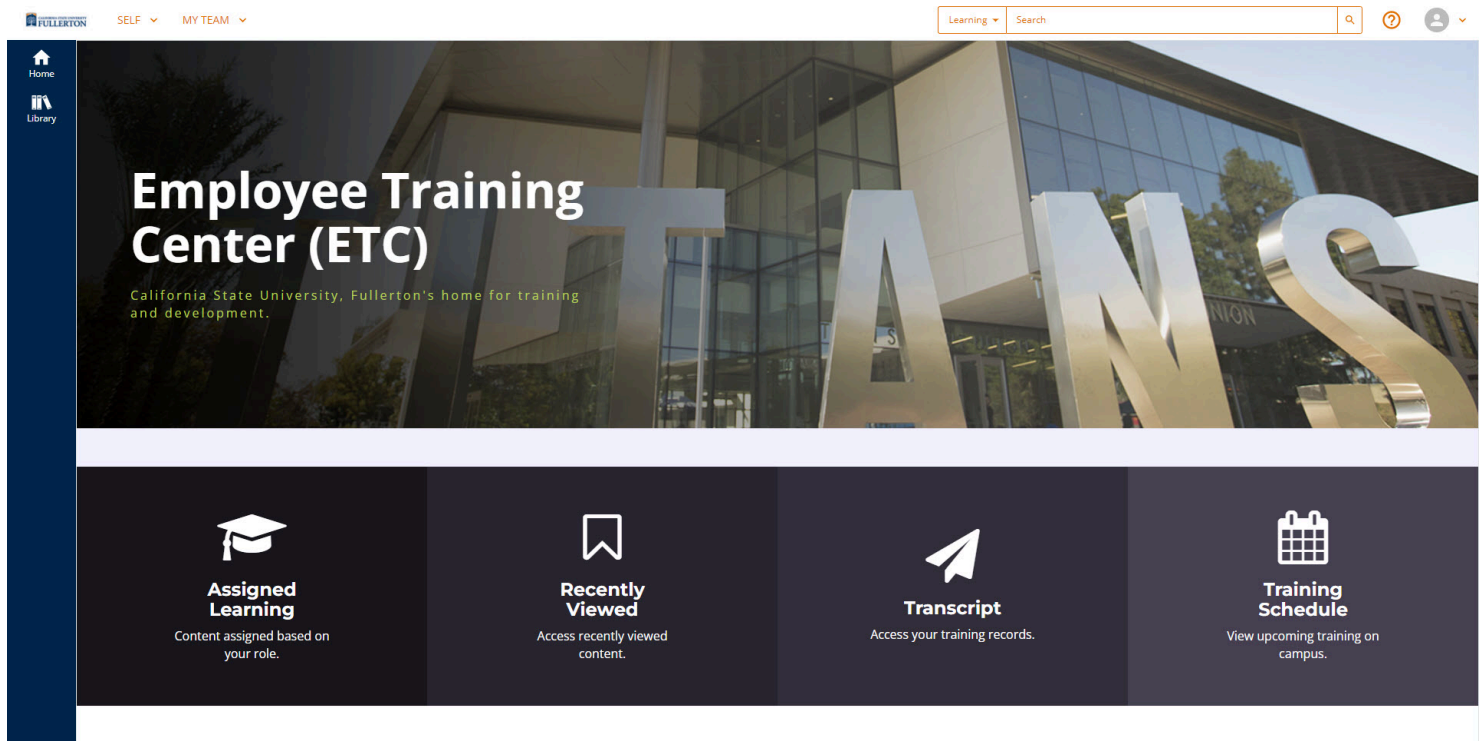


Manager Dashboard

Login / Accessing the Manager Dashboard

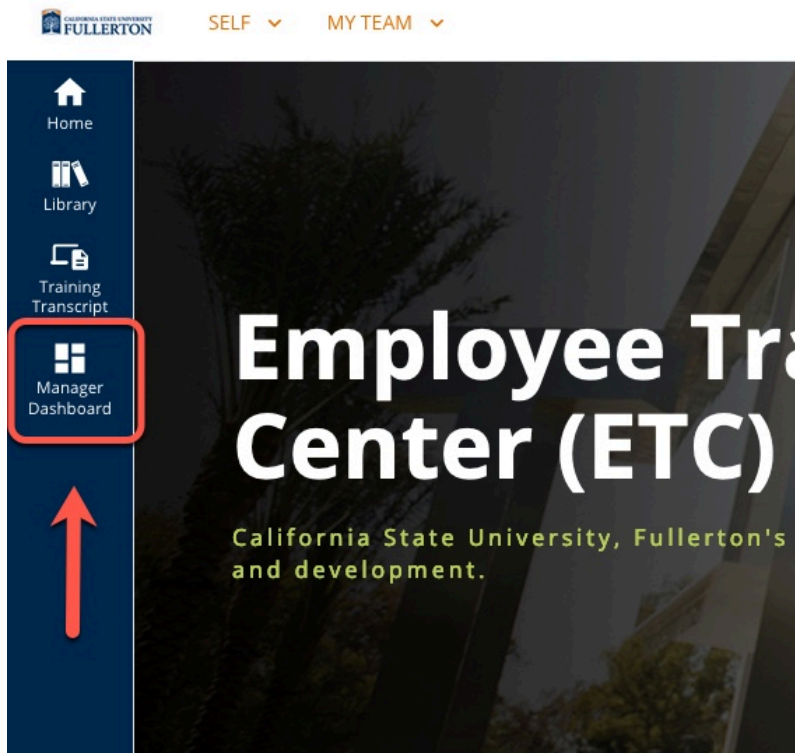
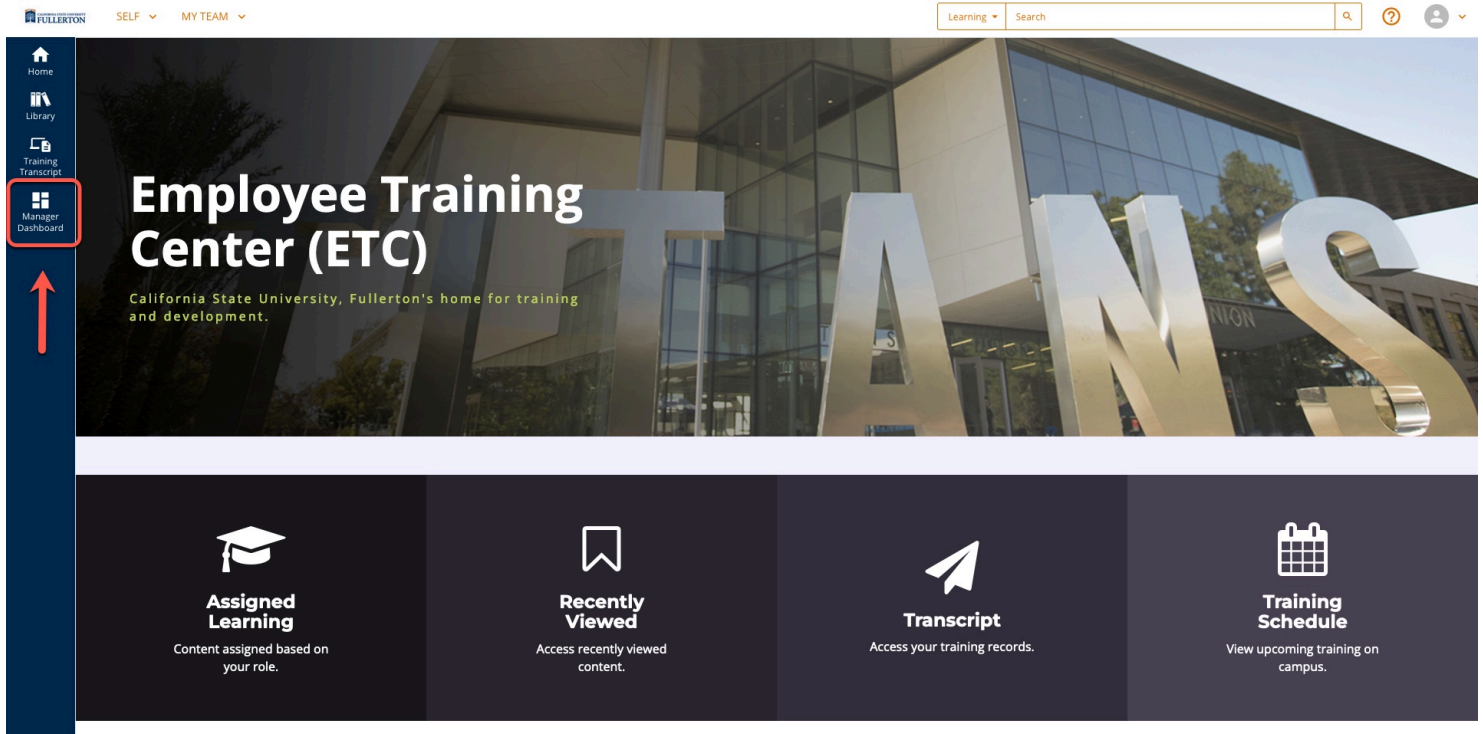
Step 1:

[Login to the Employee Training Center \(ETC\)](#)

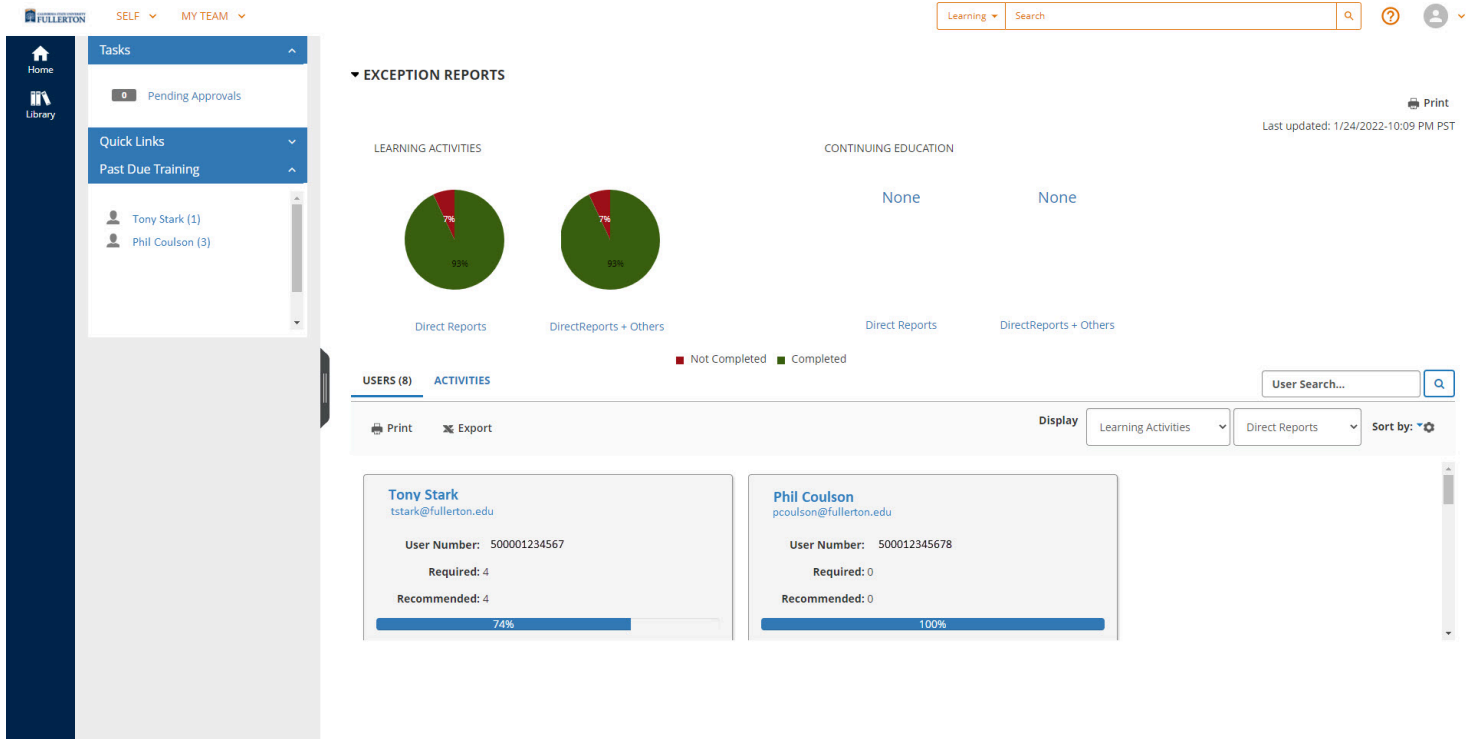


Step 2:

Click on the **Manager Dashboard** icon

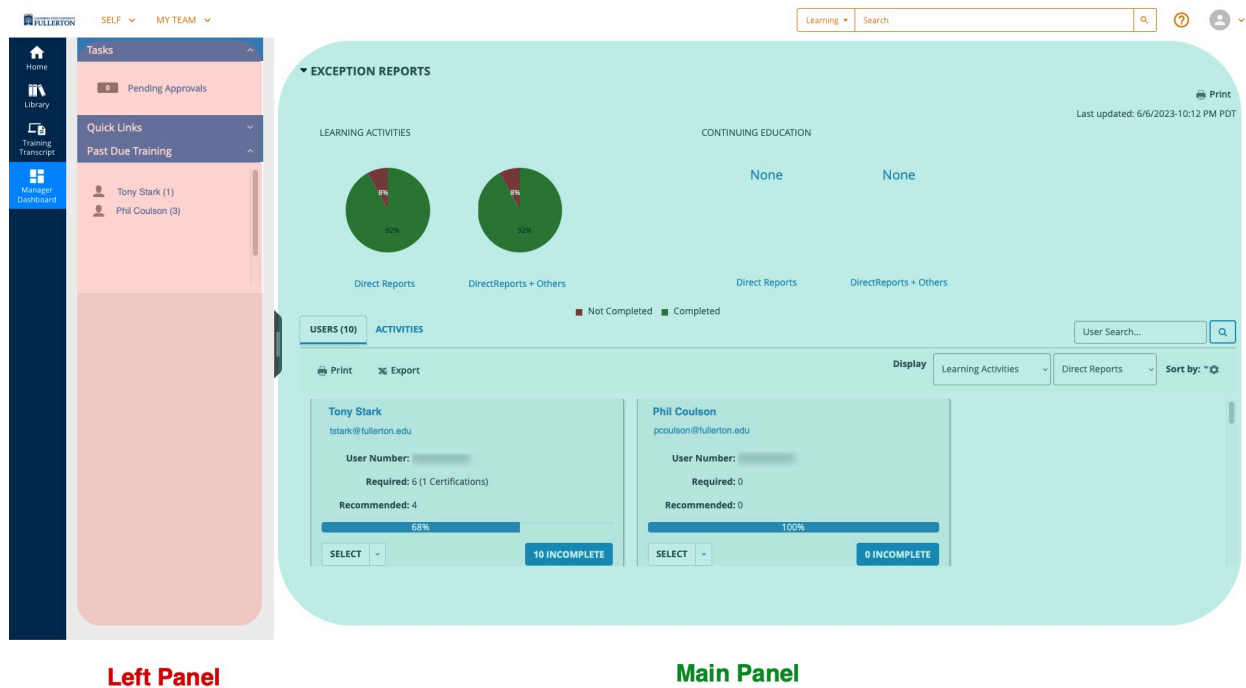


The page will refresh to the Manager Dashboard



Navigation

The Manager Dashboard consists of two panels: Left Panel and Main Panel



Left Panel

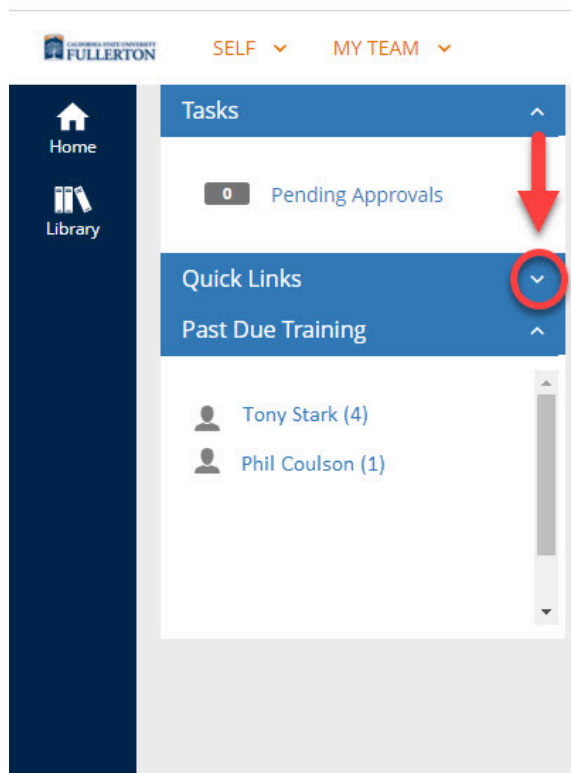
From the Left Panel you will see a snapshot of reportees who have outstanding training(s).

Quick Links

Quick links provides a link to the vendor information page about the Manager Dashboard

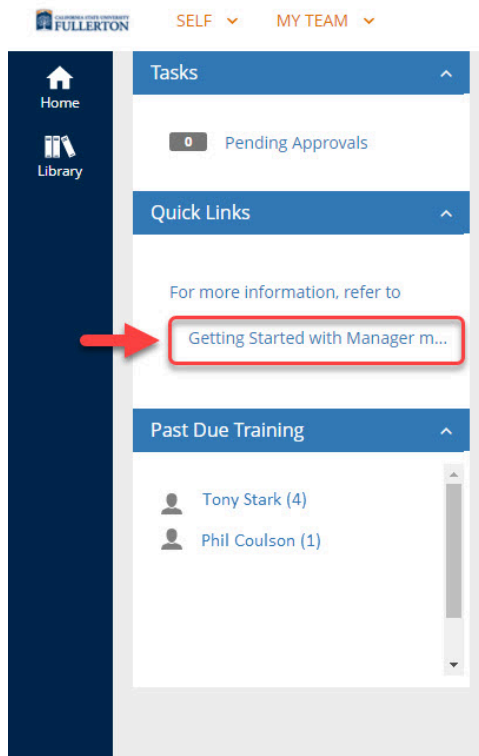
Step 1:

Click the **Quick Links** drop-down caret



Step 2:

Click on the **Getting Started...** link to see more information about the Manager Dashboard.



Getting Started Core Platform Learning Management

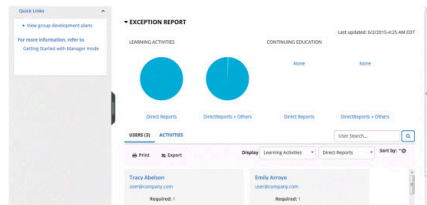
Search

You are here: [Learning Management](#) > [Manager Help](#) > [Explore the Manager Dashboard](#)

Explore the Manager Dashboard

The **Manager Dashboard** is the most important page for a Learning Management manager. From here, you can view, track, and update your direct reports and managed users and their training.

1. In the Header menu, click **MY TEAM**.
2. Navigate to the **Manager Dashboard**.



Based on what an administrator has configured for you, you can view the following details on your Manager Dashboard:

- » **Left Panel:**
 - **Quick Links:** The left panel contains links to common Manager functions, such as viewing past due trainings. If your company uses the Learning Management legacy development plans, you'll also see a link to view group development plans.
- » **Right Panel:**
 - **News:** Displays news from your primary organization.
 - **Exception Report:** Provides information on the overall progress of a user's complete and incomplete assigned activities. Depending on your security permissions, you can:
 - [Access a managed user's profile](#)
 - [View detailed exception reports](#) to see which assigned activities your learners have completed and which ones they still need to complete.

Manager Help

Explore the Manager Dashboard

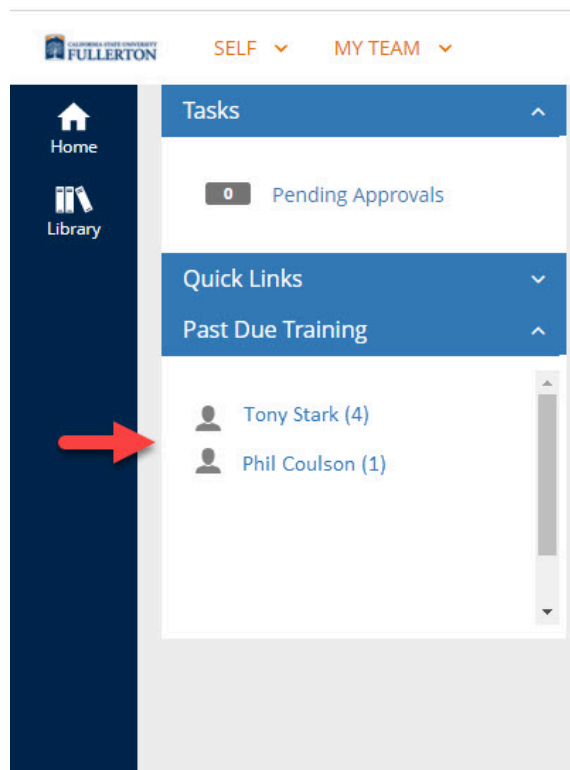
- View Your Learners' Assigned Training from the Manager Dashboard
- Manage Training Assignments as a Manager
- Access a Managed User's Profile
- Emulate a Managed or Viewable User
- Cancel User Registration from the Manager Dashboard
- Manage OJT Courses and OJT Classes
- View Another User's Training Transcript
- Working with Observer Checklists
- View Observation Checklist Reports
- Certify or Decertify Learners as a Manager
- Approve or Reject Registration Requests
- Manage Completion Request Approvals
- Manage Training Request Approvals
- Provide an Electronic Signature As a Manager
- Manage Job Associations

Past Due Training

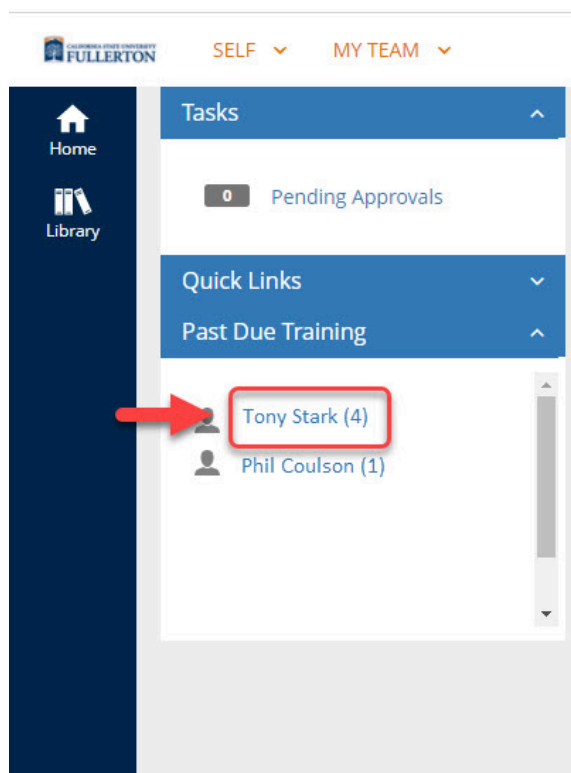
Past Due training will show a snap shot of your reportees who has outstanding training. Their name will show along with a number designating the amount of outstanding trainings they have.

Step 1:

Under **Past Due Training** all your reportees who have outstanding training will be listed.



Click on their name (link) to see their **Detailed Exception Report By User** report



The page will refresh to show the **Detailed Exception Report By User** for the user selected

The screenshot displays the 'DETAILED EXCEPTION REPORT BY USER' for Tony Stark. The page includes a search bar, a filter section, and a table of activities assigned to the user. The table has columns for Activity Name, Code, Assignment Type, Assignment Date, Due date, Expiration Date, and Notes. A single record is shown for the 'Injury and Illness Prevention Program (IIPP)' with a due date of 7/22/2021. The page also features a 'Print' button and a 'CLOSE' button.

Activity Name	Code	Assignment Type	Assignment Date	Due date	Expiration Date	Notes
Injury and Illness Prevention Program (IIPP)	FULLERTON-CURRIC-IIPP	Required	6/22/2021	7/22/2021		

Step 2: (Optional)

You can click on the **Print** button to print or save the report

DETAILED EXCEPTION REPORT BY USER
List of activities assigned to this user.
One or more assignments require approval. If you don't see an assignment, it is either pending or rejected. Please contact your administrator if you have any concerns.

Overall progress: 90%

Learning Search

Current Assignments Last Processed: Tuesday, June 6, 2023 10:12:29 PM PDT
Displaying 1 of 1 Records

Search

Filter by:

- Assignment Status
- Assignment Type
- Assignment By

Activity Name	Code	Assignment Type	Assignment Date	Due date	Expiration Date	Notes
CSU's Discrimination Harassment Prevention Program for Non-Supervisors	FULLERTON-CURRIC-SHPNS	Required	12/3/2022	6/2/2023		

Print Export

CLOSE

Step 3:

Click on the **Close** button or **Manager Dashboard** icon to exit

DETAILED EXCEPTION REPORT BY USER
List of activities assigned to this user.
One or more assignments require approval. If you don't see an assignment, it is either pending or rejected. Please contact your administrator if you have any concerns.

Overall progress: 90%

Learning Search

Current Assignments Last Processed: Tuesday, June 6, 2023 10:12:29 PM PDT
Displaying 1 of 1 Records

Search

Filter by:

- Assignment Status
- Assignment Type
- Assignment By

Activity Name	Code	Assignment Type	Assignment Date	Due date	Expiration Date	Notes
CSU's Discrimination Harassment Prevention Program for Non-Supervisors	FULLERTON-CURRIC-SHPNS	Required	12/3/2022	6/2/2023		

Print Export

CLOSE

Main Panel

From the Main Panel you can access any individuals (who report to you) who have outstanding training, view / print a high-level report of all your reportees training status'

Viewing / Sorting Team

You can sort your view to see your team listed by individuals with the most outstanding trainings to least.

Step 1:

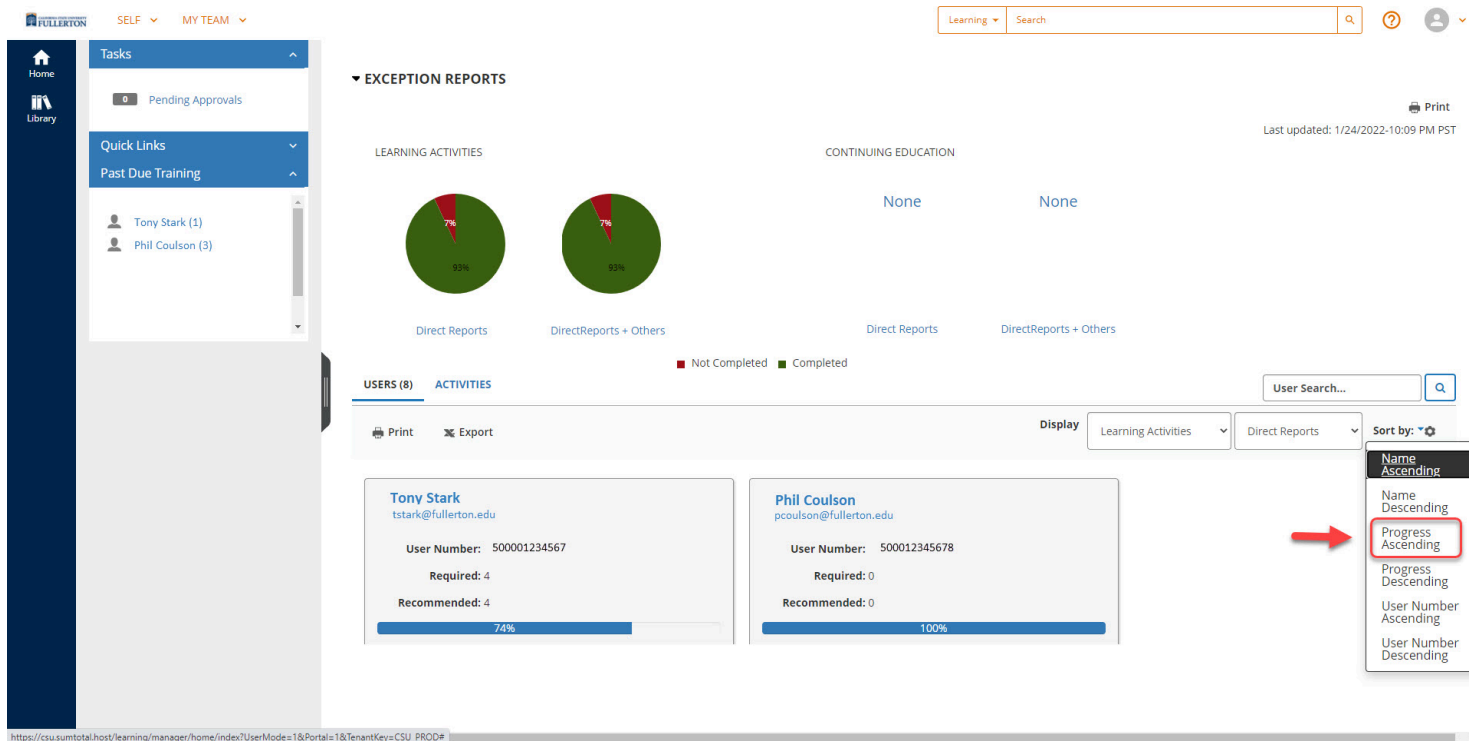
Click on the **Sort by** drop-down caret

The screenshot shows the Fullerton Learning Manager interface. On the left is a sidebar with navigation links: Home, Library, Tasks (0 Pending Approvals), Quick Links, and Past Due Training. The main content area is titled 'EXCEPTION REPORTS' and includes sections for Learning Activities and Continuing Education. Below these are two pie charts for 'Direct Reports' and 'DirectReports + Others', both showing 74% completion. A table at the bottom lists users, with details for Tony Stark and Phil Coulson. A red arrow points to the 'Sort by' dropdown menu in the top right corner of the table, which is currently set to 'Name Ascending'.

This is a close-up of the 'Sort by' dropdown menu. The menu is open, showing the following options: Name Ascending (highlighted), Name Descending, Progress Ascending, Progress Descending, User Number Ascending, and User Number Descending. A red arrow points to the 'Progress Ascending' option.

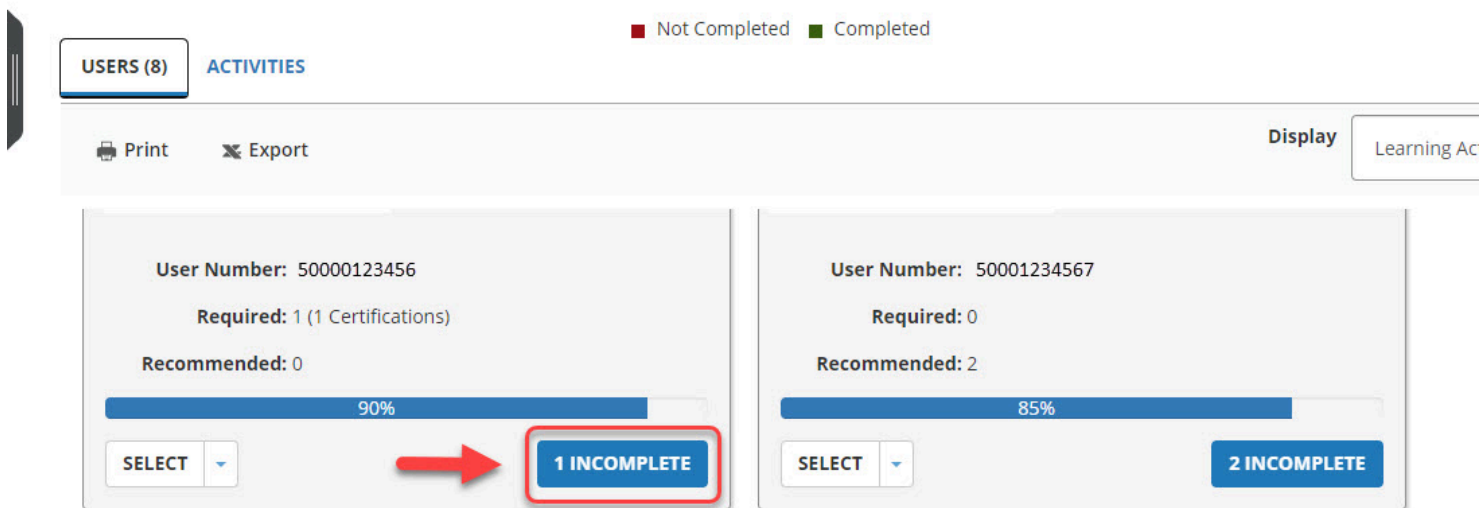
Step 2:

Select **Progress Ascending**



Step 3:

Click on the **# Incomplete** button to be taken to the **Detailed Exception Report by User** for an individual user



See [Detailed Exception Report By User](#) for more information about the report.

Reports and Actions

Detailed Exception Report By User

The Detailed Exception Report By User provides details such as **Assignment Status** and **Due Date**

DETAILED EXCEPTION REPORT BY USER Ma Lyzette E Hingco

List of activities assigned to this user.

Search []

Filter by:

- Assignment Status
- Assignment Type
- Assignment By

Activity Name Code Assignment Type Assignment Status Assignment Date Due date Expiration Date Progress Notes

Injury and Illness Prevention Program (IIPP)	FULLERTON-CURRIC-IIPP	Required	Overdue	6/22/2021	7/22/2021		0%	
--	-----------------------	----------	---------	-----------	-----------	--	----	--

Overall progress 90%

Last Processed: Monday, January 24, 2022 10:09:17 PM PST

Displaying 1 of 1 Records

Print Export

CLOSE

Status Key:

Status	Status Definition
Overdue	They have been assigned the training, have not taken it and have past the due by date
Expired	They had completed the training in the past but have not completed it for the current expiration date
Assigned	They have been assigned the training, but not taken it yet
Satisfied	They have completed the training assignment

Printing Team Report

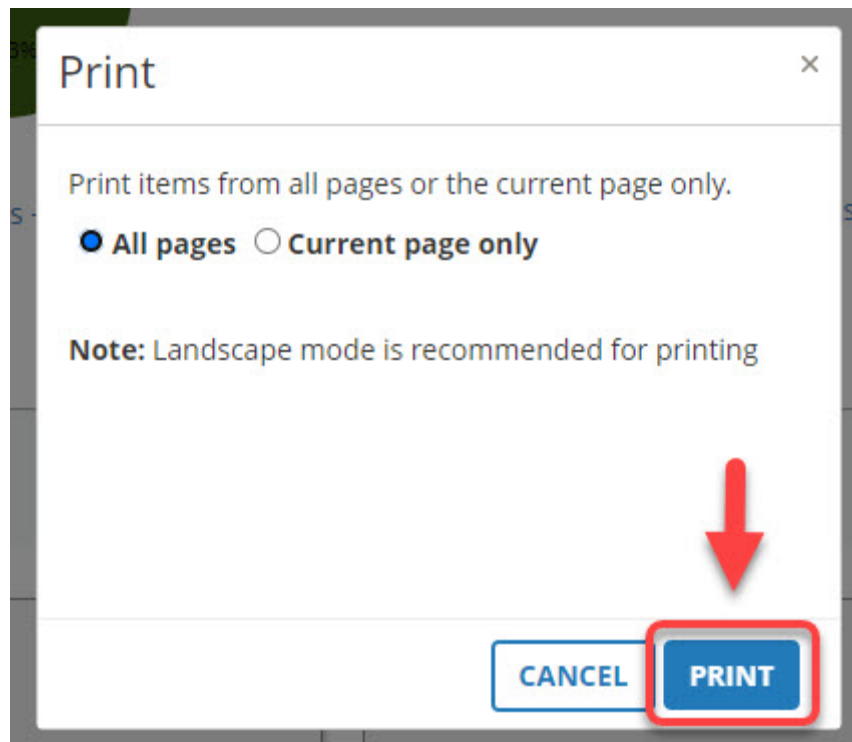
Step 1:

Under **Users**, click the **Print** button

The screenshot shows the Manager Dashboard interface. On the left is a navigation sidebar with 'Home' and 'Library' links. The main content area is titled 'EXCEPTION REPORTS'. It features two pie charts for 'LEARNING ACTIVITIES' and 'CONTINUING EDUCATION', both showing 7% completion. Below these are sections for 'Direct Reports' and 'DirectReports + Others'. A red arrow points to the 'Print' button in the 'USERS (8)' section, which is highlighted with a red box. The 'Print' button is located next to an 'Export' button. The 'USERS (8)' section displays two user profiles: Tony Stark and Phil Coulson, each with their user number, required/recommended counts, and a progress bar.

Step 2:

Click the **Print** button



Step 3:

Click the **Destination** drop-down to select appropriate print option

1/25/22, 9:05 AM Manager Dashboard - SunTotal

SUMMARY EXCEPTION REPORT BY USER
Generated By: Nick Fury
Created on: Tuesday, January 25, 2022 9:05:27 AM PST

Displaying 8 of 8 Records

Name Email	Manager Name	Primary Job	Primary Domain	Exception Count Required/Recommended	Percent of Required Training Completed
[Redacted]	[Redacted]	[Redacted]	Fullerton	4/4	74%
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/0	100%
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/0	100%
[Redacted]	[Redacted]	[Redacted]	Fullerton	1/0	91%
[Redacted]	[Redacted]	[Redacted]	Fullerton	1/0	90%
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/2	85%
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/0	100%
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/0	100%

Print 2 pages

Destination **Save as PDF**

Pages All

Layout Portrait

More settings

Save Cancel

Step 4:

Click the **Print / Save** button

1/25/22, 9:05 AM

Manager Dashboard - SumTotal

SUMMARY EXCEPTION REPORT BY USER

Generated By: Nick Fury

Created on: Tuesday, January 25, 2022 9:05:27 AM PST

Displaying 8 of 8 Records

Name Email	Manager Name	Primary Job	Primary Domain	Exception Count Required/Recommended	Percent of Required Training Completed
[Redacted]	[Redacted]	[Redacted]	Fullerton	4/4	74%
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/0	100%
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/0	100%
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Fullerton	1/0	91%
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Fullerton	1/0	90%
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/2	85%
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/0	100%
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	Fullerton	0/0	100%

Print

2 pages

Destination Save as PDF

Pages All

Layout Portrait

More settings

Save Cancel

Export Team Report

Step 1:

Under **Users**, click the **Export** button

The screenshot displays the Manager Dashboard interface. On the left is a navigation sidebar with links for Home, Library, Tasks, and Quick Links. The main content area is titled 'EXCEPTION REPORTS' and includes sections for 'LEARNING ACTIVITIES' and 'CONTINUING EDUCATION'. Below these are two pie charts for 'Direct Reports' and 'DirectReports + Others', both showing 7% completion. A legend indicates 'Not Completed' (red) and 'Completed' (green). At the bottom, the 'USERS (8)' section is active, showing details for Tony Stark and Phil Coulson. In the 'USERS (8)' section, the 'Export' button is highlighted with a red box and a red arrow points to it.

Step 2:

Click the **Next** button

The screenshot shows an 'Export' dialog box with the following options:

- Export items from all pages or the current page only.
 - ☒ All pages
 - ☐ Current page only
- Export the records in MS-Excel (xls) format or character delimited text (csv) format.
 - ☒ MS-Excel
 - ☐ Character delimited text

At the bottom of the dialog, there are two buttons: 'CANCEL' and 'NEXT'. The 'NEXT' button is highlighted with a red box and a red arrow points to it.

Step 3:

Click the '**Click here to download the file**' link

Click **OK** to exit



View Individuals with Outstanding Training

Go to the [Past Due Training](#) section for a summary of individuals who have outstanding training

OR

Go to the [Viewing / Sorting Team](#) section to review individuals' status

Need More Help?

Please contact the Employee Training Center:

- employeetrainingcenter@fullerton.edu
- 657-278-2064