

CSU Learn

Manager Quick Guide

CSUCI's portal for learning and professional development

Managers can:

- Quickly view team learning progress
- Assign training to employees
- Register employees for training
- Approve learning requests
- Delegate training tasks to designated proxy

Self-Menu Quick access to your profile and sign out

Manager Menu Fast access to team data

Library Browse more than 60 topics

Search more than 75,000 books, videos and courses

Help context-sensitive help

Assigned Learning
Content assigned based on your role.

Recently Viewed
Access recently viewed content.

Transcript
Access your training records.

Training Schedule
View upcoming training on campus.

Assigned Learning
One-click access to assigned learning

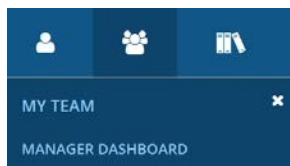
Recently Viewed
Quickly revisit your last learning activities

Transcript
Your learning history in one place

Training Schedule
See upcoming classes at your campus

Getting started with Manager Tools

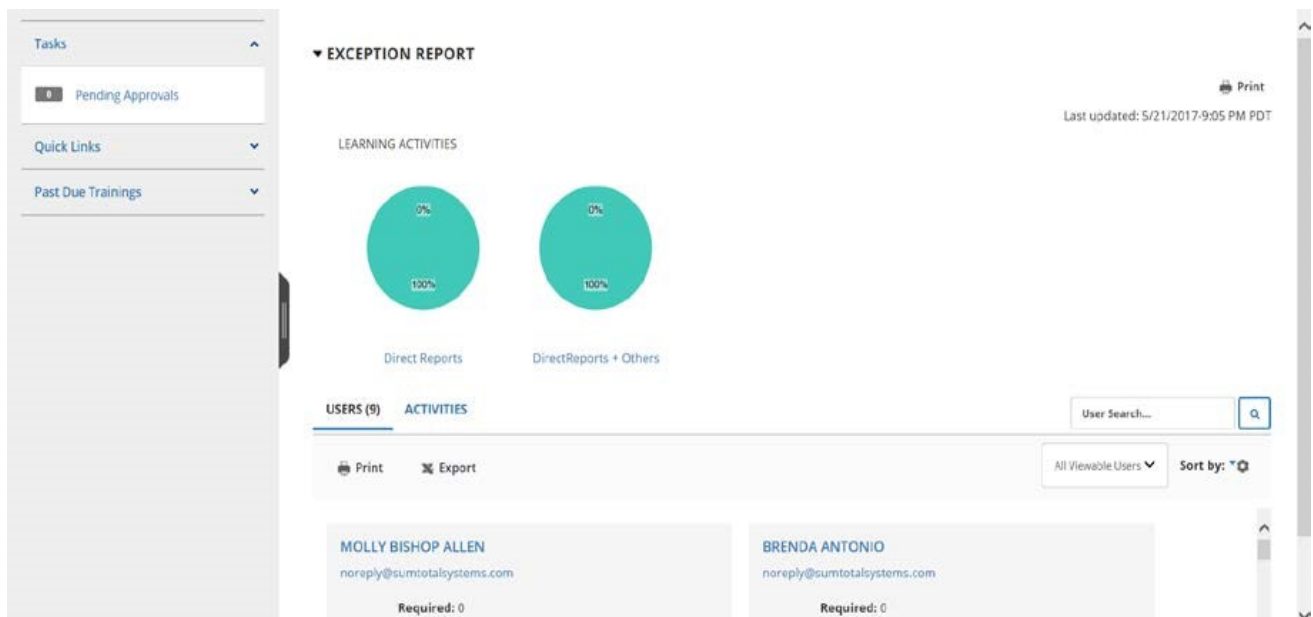
Once you have been identified as the manager of a user in the CSU Learn system, you will automatically have the **My Team** icon appear in the Top Menu. Clicking on that will give you access to a **Manager Dashboard**.



Manager Dashboard

When you 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.



Note: Manager Dashboard is updated nightly, so if one of your users completed 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 status.

View Managed Users

In the Manager Role, you have the ability to view information about your managed users and the progress of their assigned activities.

Your viewable users will all be displayed in tiles on your **Manager Dashboard**. 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, either as your direct reports or as managed users whose training you are responsible for managing. If you manage more users than just direct reports, you can change your view from **All Viewable Users** to **Direct Reports** if you wish to only view your direct reports.

The screenshot displays the Manager Dashboard interface. At the top, there are tabs for 'Direct Reports' and 'DirectReports + Others'. Below these, there are tabs for 'USERS (339025)' and 'ACTIVITIES'. A search bar labeled 'User Search...' is on the right. Below the search bar, there are dropdowns for 'All Viewable Users' and 'Sort by:'. The main area shows two user tiles. Each tile displays the email 'noreply@sumtotalsystems.com', 'User Number', 'Required' count, 'Recommended' count, and a progress bar. The first tile shows 'User Number: 1026198659486', 'Required: 0', 'Recommended: 0', and a '0%' progress bar. The second tile shows 'User Number: 1729810', 'Required: 0', 'Recommended: 3', and a '0%' progress bar. Both tiles have a 'PROFILE' button and a blue button labeled 'NO ACTIVITIES ASSIGNED' or '3 INCOMPLETE'.

View Status of Assigned Training

When you first enter your **Manager Dashboard** you will see an overview of your managed users and the status of their assigned training. The **Exception Report** at the top will show you the percentage of compliance your managed users are currently at for all training assigned to your managed users. For each individual, you will see the overall status of their currently assigned training. Click the blue **incomplete** button to see a more detailed report. Remember, you can also sort this list by process.

The screenshot displays the Manager Dashboard interface. At the top, there is a tab for 'EXCEPTION REPORT'. Below this, there are two pie charts labeled 'LEARNING ACTIVITIES' for 'Direct Reports' and 'DirectReports + Others'. The 'Direct Reports' chart shows 100% completion, and the 'DirectReports + Others' chart shows 100% completion. Below the charts, there are tabs for 'USERS (338865)' and 'ACTIVITIES (0)'. A search bar labeled 'User Search...' is on the right. Below the search bar, there are dropdowns for 'All Viewable Users' and 'Sort by:'. The main area shows two user tiles. Each tile displays the email 'noreply@sumtotalsystems.com', 'User Number', 'Required' count, 'Recommended' count, and a progress bar. The first tile shows 'User Number: 1026198659486', 'Required: 1', 'Recommended: 0', and a '50%' progress bar. The second tile shows 'User Number: 1729810', 'Required: 1', 'Recommended: 0', and a '50%' progress bar. Both tiles have a 'PROFILE' button and a blue button labeled '1 INCOMPLETE'.

Assigned Training by Activity

You can also see which trainings are assigned to your managed users and the overall completion of the training. Switch from the **Users** view **Activities** view to see all the activities that are currently assigned

to your managed users. You will now see how many are still required to complete each training and the overall percentage of completion.