## WELCOME TO THE STATE OF VERMONT'S LMS/LINC: LEAD, INNOVATE, NAVIGATE CONNECT FOR MANAGERS AND SUPERVISORS

We are excited to roll out a new training and registration system for the State of Vermont, SOV LINC. As a manager or supervisor, you have many capabilities that will help you manage your employee's trainings and learning plans. This document will provide information on your access as a user, as well as functions available to you as a manager or supervisor.

#### CONTENTS (click on the link):

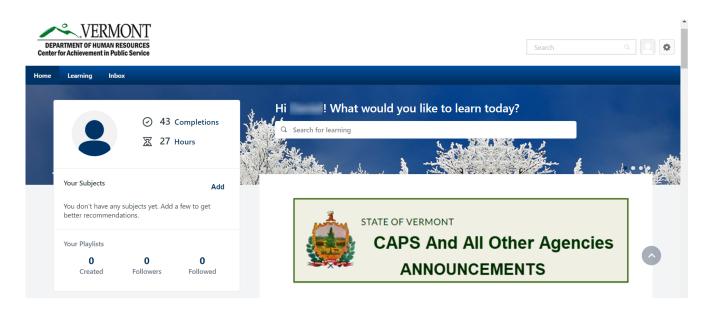
#### **User Functions**

- Login
- Learner Home Page
- Browsing and Registering for Trainings
- Withdraw Registration
- Universal Profile and My Account
- Transcript

## Login

Login by clicking on the link: https://vermont.csod.com/samldefault.aspx?ouid=2

Once you have signed in, the screen will change to your Learner Home Page.



If you have any issues with logging in, please contact DHR.CAPS@vermont.gov

# Troubleshooting

**Supervisory Functions** 

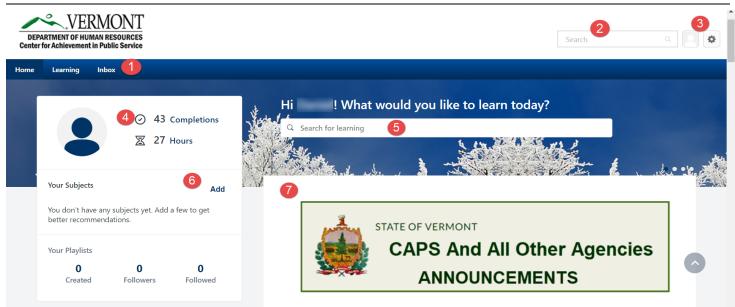
Assign Training

My Team View

Reports

Approve Training

# Learner Home Page



Navigation Tab – All users have at least 3 tabs (that include drop down menus) "Home", "Learning"

- **o** and "Inbox". Hover (don't click) over each tab for drop-down menus to appear.
  - Home. There are two menus under Home: "Universal Profile" and "Learner Home".
    - "Universal Profile" brings users to their "Universal Profile". This page provides professional information about users to other users. To edit "Universal Profile" see additional information here.
    - "Learner Home" brings users back to the "Learner Home" page.
  - Learning. There are four menus under Learning: "Playlists", "View Your Transcript", "Events Calendar", and "Browse for Training".
    - "Playlists" allows users to search in the LMS for a playlist they may be interested in and also gives the option to "Follow" the person that created it for more playlists from that person.
    - "View Your Transcript" allows users to view classes on their transcript, including classes they have completed and those that are "in progress."
    - "Events Calendar" allows users to see classes that are coming up by month.
    - "Browse for Training" allows users to search for training based on title, subjects or type of training
    - Inbox. There is only one menu under Inbox: "SOV Inbox".
      - "SOV Inbox" contains information for users including the number of trainings they have been approved and registered for, classes that managers need to approve and other pending requests.

Search Bar – The search bar allows users to search by class, curriculum, subject area, learning object, or other
 SOV employees. After typing in the search bar, a list of possible items will drop down where users can choose what they are looking for.

**Universal Profile/Learner Home** – There are two icons: "Universal Profile" (the picture icon), and the other (the gear icon) is "My Account", "Help" and "Log Out." For more information about Universal Profile click here.

- **My Account** holds user's settings for *Out of Office* and signature in the system.
- **Help** allows users to access the online help functions for any aspect of the system. The **Help** function in Cornerstone is connected to whichever page users are on when accessing **Help**. While in "Help", users can also search for other questions.

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• Log Out allows users to logout of the system.

**Completions and Hours** – Completion tells you how many trainings you have completed to date and Hours tells you the amount of time you have spent in those trainings.

**Search for learning -** Search for Learning is a quick way to find a class that you want to take. By entering in a keyword in the blank field, it will return a list of that key word and open the "Learning Search" page.

		Lea	arning Search		
		Q ethics			
Filters	Reset	215 Results			🗑 Event Calendar
DURATION	~				
ТҮРЕ	~		And	A	
SUBJECT	~				
RATING	~	Online Class	Online Class	Online Class	Online Class
PROVIDER	~	Ethics Toolkit: Why Worry About Ethics?	Ethics Essentials: Organizational Ethics	Ethics Crash Course: Personal Ethics	Ethics Crash Course: Organizational Ethics
SHOW ONLY MOBILE ENABLED		6 minutes	7 minutes	7 minutes	7 minutes
		000	000	000	000

Subjects – By clicking the "Add" button in the Subject area, you can choose which subjects interest you or
that you have prior knowledge in. This will ensure that the newest trainings will show up for you in the "Top Picks" banner on the Learner Home Page.

#### **Your Subjects**

☆ > Learner Home > Learning Search

	5
Search	Browse
Select subject	ts to help personalize your recommendations.
Q Search f	for Subjects
Suggestions	
E-Learning	AHS Direct Service AHS Required Training Business Skills
Employee S	iervices  AHS Awareness  CAPS Employee Development  DPS
VTrans Safe	ty and Health  AHS Orientation Emergency
Time Manag	gement and Productivity  Personal and Career Development  VTrans Technical
Communica	ation D Safety D Leadership Essentials BGS
Manageme	nt and Leadership
Cancel	Save

Agency Scrolling Banner - This banner is created for users to be able to click on their Agency to find out the newest Announcements or other information about the LMS/LINC.

- 1. To browse for trainings, users can do one of the following:
  - a. Hover over **Learning**, then click on **Browse for Training** from the drop down menu.
  - b. Click on the Browse All Classes button on the Welcome Page.
  - c. Type the name of the training or learning object in the **Search Bar**.
- 2. After searching through Browse for Training, a screen similar to the one below will appear. On the left hand side of the screen, users can search for trainings by Subject, by Type (hover over the icons to see what type each icon represents), by Date (enter date range), by Full Calendar and/or by Location. The center of the screen will show users trainings that are available. When you click on the drop down arrow in the right hand box, you can search by Most Recent, Title, Duration and/or Popularity.

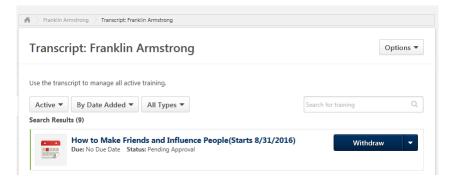
		Browse for Training 8 Results	
Training clear			
My Subjects Newest		By Most Recent ♥ By Trite	
		Supervisor Jazz Skills By Most Recent	
Subject clear		Curriculum	
CAPS General		building a professional team. By Popularity	
Type clear		Performance Management Material - Center for Achievement in Public Service (CAPS) A guidebook for using performance management to improve your managerial skills.	
		Video - Center for Achievement in Public Service (CAPS) Learn how to use jazz hands for a better life.	
Date Range clear		Emotional Intelligence: How Good Managers Become Great	
From		Video - Center for Achievement in Public Service (CAPS) This video provides a background in emotional intelligence and tools to help managers improve their interpersonal skills.	
То	<b>#</b>		
View Full Calendar		How to Make Friends and Influence People           Evert - Center for Achievement in Public Service (CMPS)           This training will provide employees with the skills to make new friends and have an influence over people.	
Location clear			
		Jazz Hands	

3. When users find a training they are interested in, they can click on the title of the training. Users will see the box below. The top box provides a description of the training. Below this, you will see available sessions, including the location, date, duration and number of spots available.

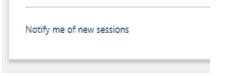
To request a training, users choose the training date and location that works for their schedule then click the request button.

	How to Make Friends and Influence People		
	Event + Center for Achievement in Public Service (CAPS) + 2 hours + \$0.00		
	Request		
p>This traini	ng will provide employees with the skills to make new friends and have an influence over people.		
Sessions	Details		
	Details vailable <b>v</b> View Full Calendar		
	View Full Calendar		
Show A	Valiable v View Full Calendar 1569 - 00024	24 Openings Available	
	Vailable v View Full Calendar 1569 - 00024 Session , Center for Achievement in Public Service (CAPS) , 2 hours , \$0.00	24 Openings Available Request	
Show A	Valiable v View Full Calendar 1569 - 00024		ŀ

4. Once the user has requested training, the user's screen will change to the one below. The system will then generate an email to the user's supervisor for approval.



- 5. If a user is interested in a training but no sessions are available or the dates don't work for their schedule, they can, either:
  - a. Click on Notify me of new sessions. This is located in the bottom left hand corner of the screen.



This will allow the user to express an interest in the training and be notified when new sessions are scheduled. As seen below, users can select a location, add comments and also click the box at the bottom, "Notify me of when sessions are scheduled at any location."

### **Interest Tracking**

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□ Notify me when sessions are scheduled at any location



## OR

b. Users can request to be put on a waitlist. If the session shows "No Seats Available," click on "Request."

1/	Session - Center for Achievement in Public Service (C/		Request 💌
	Location Center for Achievement in Public Service (CAPS), State of Vermont	Duration 10/5/2016, 9:00 AM EST - 10/5/2016, 12:00 PM EST	Request
	English (US)		

The following window will pop up. Click "Yes." You will then be added to the waitlist for the session and be informed when an opening is available.

This class is currently full. If you proceed with your request, you will be put inte for this class. Do you want to continue?	o a waitlist	
	No Yes	

If a user is unable to attend a training, the user should login to the system and cancel/withdraw their
registration for a class as soon as possible. Users will find a Withdraw link located in a few places. First users
will see the Withdraw link or button on the Welcome Page in the "My Upcoming Training" box located in the
lower right hand corner of the screen. Users should find the class they are registered for and click on
"Withdraw".

	Due Date	Action
Intro To Comic Relief	None	None
Intro To Comic Relief	None	None
Intro To Comic Relief	None	None
How to Draw Comic Strips Like a Pro	None	Withdraw
What to Wear on Vacation	None	Select Session
CAPS Training KAP	None	None

2. Users will also find a Withdraw button on their "transcript" page, as shown below. The user should click on the drop down arrow, the box to the right will pop up.



3. When users click on Withdraw, the box below will pop up. Select one of the reasons provided in the drop down box and write in a comment. After the user clicks on Submit, their status for the class will be "Withdrawn." If users don't Withdraw from the class and don't show up, they will be in "No Show" status which will stay on their transcript.

	Event Name:	How to Make Friends and Influence People
	Date / Time:	(1) 8/31/2016 10:00 AM - 8/31/2016 12:00 PM
	Location:	Center for Achievement in Public Service (CAPS)
	Price:	\$0.00
Please select a rea	son 🗸	]
Comments		^
		$\sim$

1. The "Universal Profile" can be found in the upper right hand corner of the "Welcome Page" (the image of the person).

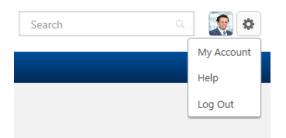


2. When users click on this image, it will bring up the "Bio" page, as seen below.

5	🖌 👌 Franklin Armstrong 👌 Bio	
Franklin Armst Workforce Deve	Віо	My Team 🔻
Eio San Transcript Market Actions	Franklin Armstrong Workforce Development - Ops Workforce Development Asst Dir	
	Email Location	
	Summary 2	Ø
	Subjects 3	
	Team 4	
	Lucy van Pelt Administrative Srvcs Mn	
	Workforce Development Asst Dir	

- **4 About** This section includes the users email and location. This information is generated by a feed from the VTHR system.
- Summary Users may create a professional bio about their work history, skills and current projects in this section by clicking on the box on the right hand side of this section.
- **Subjects** Users may choose from a provided list, areas in which they have an interest or skill.
- **5 Team** This section allows all users to see the hierarchy with their Supervisor.
- **Bio/Transcript/Actions** This sidebar connects users to other parts of the system connected to them.
  - "Bio" is the screen that is currently open.
  - "Transcripts." For more information, click <u>here</u>.
  - "Actions Tab" allows users to select sessions, withdraw from a training or view training details.

3. Click on the circle next to the image in the upper right hand corner on the "Welcome Page"; users will find the following Menu (My Account, Help, Log Out).



4. Click on "My Account". The screen below will appear. On this screen, users can change their password, edit security questions, check "on vacation" if out on extended leave, select a signature style and add/change the profile picture.

	My Account ) Preferences	
_	Preferences	Options 🔻
X Preferences	Franklin Armstrong Ourdprace Development + Ops Wardsrace Development Asst Dir         Letung         On Catalon         Draups your status to Our of Offers # youThe away on an entended leaved	Change Password Edit Security Questions
	Select Signature Franklin Armstrong 🔻	Cancel Save

5. To change the user's profile picture, hover over the image or picture and a drop down arrow will appear in the upper right hand corner. Click on this arrow to open the box below. The recommended best practice for User profile pictures are professional, appropriate head shots.



6. Click on "Browse" and choose a picture to upload. Use the photo box to move the image and click Save. The image should show up in "Universal Profile".

## Transcript

**Transcript** allows users to see trainings that are active, completed and archived. From the trainings that are active, users can withdraw from trainings, view details of the training (for location, objectives, etc.) and select sessions for trainings that have been assigned.

1. To view Transcript, hover over Learning and choose "View Your Transcript." Users will see the screen below.

	🖌 👌 Franklin Armstrong 👌 Transcript: Franklin Armstrong		
Franklin Armst Workforce Deve	Transcript: Franklin Armstrong		
Bio	Use the transcript to manage all active training.		
Transcript	Active  By Date Added  All Types  Search for training  Q		
Actions	<ul> <li>Active Completed Archived</li> <li>Date Status: Pending Approval</li> <li>Introduction to Basket Weaving(Starts 9/13/2016) Due: No Due Date Status: Registered</li> <li>View Training D</li> </ul>		
	CAPS - Emotional Intelligence Book Due: 8/31/2016 Status: Registered		
	How to Make Friends and Influence People(Starts 8/31/2016) Due: No Due Date Status: Denied		

2. When users click on the "Options" menu in the upper right hand corner of the window, additional selections are available. From here users can view and print transcripts, as well as add external training.

	Options 🔻
	Add External Training
	Export to PDF
	Print Transcript
earch fo	Run Transcript Report

- Add External Training the system allows users to add external training to their transcript, with approval.
- **Export to PDF** copies the transcript to a .pdf document for saving or printing.
- **Print Transcript** transfers the transcript information to a table format for printing.
- **Run Transcript Report** allows users to filter the report by training title, training type or various date filters as an excel-based transcript report.
- 3. If users need a more formal transcript, please contact CAPS.

#### **Supervisory Functions**

## Assign Training

A feature of SOV LINC allows managers and supervisors to assign trainings to their entire team, as well as individual members of their team. *The Department of Human Resources highly encourages managers and supervisors to follow the best practice of talking with their team about the training and the reason behind the training assignment before using the system to push this training to an employee's upcoming list.* 

To assign trainings to individuals or teams, follow these directions:

1. Hover over Learning, and click on "Browse for Training". When you find a training, material or other learning object that you would like to assign to your team, click on the title. When the training opens, you will see two buttons, one that says Request (this is for you to request the training for yourself) and one button that says Assign. Click on the Assign button to assign training, material or other learning objects to your team.

🖍 > Browse > Training Details
Training Details
CAPS - Emotional Intelligence Book         Material - Center for Achievement in Public Service (CAPS) + 3 hours + \$0.00         Request       Assign         A book that provides an overview of emotional intelligence.
Price \$0.00
Supervisor Competencies Addressed Self-Aware, Effective Communicator, Team Builder, Promoter of Diversity, Problem-Solver/Decision-Maker
Available Languages English (US)
Version 1.0
Subjects CAPS > CAPS Employee Development

2. On the screen below, you can choose who you assign the training to (including their subordinates). Where applicable, choose a due date (this field doesn't show up for all learning objects), a comment or reason, and who the training should be assigned to. You can also choose to **Automatically register users**, which allows you to not have to approve users again after they register for the training. Click Submit. This training or object will now show up on your team member's transcript as something they need to complete.

Y ) Trainin	ng Details 👌 Assign Training				
Assig	n Training				
	CAPS - Emotional Int Material - Center for Achiev		i <b>ce Book</b> n Public Service (CAPS) + 3 h	ours - \$0.00	
8/31/2016	5				
Please rea	ad this article in preparation for a	discussio	on we'll have at our next quart	erly meeting.	^
					~
Automa	atically register users Users who have the training al	ready in	their transcript are not inclu	ided in this assignment	
Ø	Direct Subordinates			Language Equivalency	Include Subordinates
<ul> <li>Image: A second s</li></ul>	Charlie Brown				
V	Franklin Armstrong				
	Peppermint Patty				
Select an	Indirect Subordinate	C7	Select a User from a Cost C	enter I Approve	
	Indirect Subordinates			Language Equivalency	
					Cancel Submit

## Approve Training

All trainings will require your approval before employees can be registered for the class. *It is very important that you respond to these requests timely*.

Every training an employee requests in SOV LINC will generate an email to you as the manager to approve. There are multiple locations in the system where you can approve training requests, including a link included in the email to SOV LINC.

1. On the "Learner Home Page", Hoover over the "Learning" tab and click on "Manage Employee Learning".

	ETMENT OF HUMAN RESOURCES or Achievement in Public Service				
Home	Learning Inbox Reports				
	Playlists		AT CON		
A.	View Your Transcript	$\odot$	5 Completions	Hi	! What would you like to learn today?
	Events Calendar		11 Hours	Q Search fo	r learning
5	Browse for Training	<b>A</b>	) Badges		
1	Manage Employee Learning			-	
1		Your Subjects	Add		
		You don't have any subjects yet. better recommendations.	Add a few to get	1	STATE OF VERMONT Department of Pul
		Your Playlists			
		0 0 Created Followers	1 Followed		ANNOUNCEMENT
		Transcript View			

2. When on the "Manage Employee Learning" page, click on the "Manage Pending Requests.

\*\*\*\*Note that you can also check the employees transcript from this page too to see what training they have completed.

DEPARTMENT OF HUMAN RESOURCES Center for Achievement in Public Service	
Home Learning Inbox Reports	3
Manage Employee Learning	
View the Learning information for your empty and	
> Manage Pending Requests (beyleys a list of pending requests for which you are the approver)	
Manage Subordinates	
SUBORDINATES	
NAME	VIEW TRANSCRIPT
Tyler LaBounty	<b>***</b>
Matthew Roy	8.3
O Melanie Varlass Naceda	<b>B</b>

To approve the request, click on the green check mark; to deny the request, click on the red "x." Please note, suggested best practice would be to communicate your denial to your employee in person before denying their request for training in the system.

View Pending Requests View cubstanding training requests you must approve, driver, or deny, Deferring a request to lise request to the rest person in the approval Approver	chain for that employee. Click on the employee's nam	e to view their transcript. If you would like others	to make approvals on your behalf, you may sha	e your approving permissions for users for whom	you are the following:
Training Pending Approval					
Printable Version 💥 Export to Excel  Isame Q. Search					(1 Result)
Requested By	Training	Туре	Date	Purpose	Options
Amstrong Frankling Violandras Development Ask Dir (Poston) Lucy van Piet (Manager)	How to Make Friends and Influence People(Starts 8/31/2016)	Initial	8/22/2016 3:26 PM		<b>√</b> ×

« Back

a. When you approve the request, the system will generate a box for comments. The employee is now approved to attend the training. They may still need to pick a session to get started. Do not fill in the information connected to payment; our system doesn't generate payments and employees won't be paying for the cost of trainings. If there is a cost associated with the training, it will be billed to your department.

Approve Request	
Please enter any additional comments:	
×	
By selecting "Employee Pays" you are requesting that the employee be allowed to	take this course only if they pay the percentage of the total cost you specify below. The employee's cost center pays the remaining amount, if any
Employee pays by credit card 0 %	
Cancel Submit	

 b. When you deny the request, the system will generate a box for comments. Click Submit. You will then be brought back to the "View Pending Requests" screen.
 Deny Request

Cancel Submit

3. You can also approve training through your "Inbox". Click on "Inbox", and if there are pending approval requests from your employee, their will be a highlighted number for you to click on. (example shows a zero with no approvals needed at this time.)



4. Please see the section on "Reports" for another place to approve trainings requests.

## My Team View

Under "Universal Profile" (click on the picture in the upper right hand corner of the screen), at the bottom of the screen, the supervisor will see themselves and their team. If the supervisor clicks on the drop down box in the upper right corner, they will also see their entire team . Any members of the team with the circle icon (next to the arrow below), have subordinates. If the supervisor clicks on the icon, the employee and their subordinates will be displayed.

	🔏 👌 Lucy van Pelt 👌 Bio		
Lucy van Pelt	Віо	My Team 🔻	My Team 🔻
Administrative	Lucy van Pelt Workforce Development - Ops Administrative Srvcs Mngr I	Search Q Lucy van Pelt Administrative Sr Franklin Armstr Workforce Devel	Search Q ( return to Lucy van Pelt Charlie Brown Workforce Dev & Sally Brown Admin Support C
	Email Location	Charlie Brown Workforce Dev &	
	Summary		
	Subjects		
	Team		
	Administrative Srvcs Mngr I Franklin Armstrong Workforce Development Charlie Brown Workforce Dev & Trainin	Peppermint Patty Workforce Dev & Trainin	

## Reports

SOV-LINC has a range of reports that are useful to managers and supervisors. These reports can help supervisors track employee training progress, look at employee training transcripts and track employee attendance.

1. Hover over "Reports" and click on "Standard Reports". The screen below shows the list of reports available.

Reports	
Click on a report category to view those reports. You may search for any reports by title or description.	
Track Employees	
No Show Details Displays sessions where one or more students did not attend the required number of parts. Detail view lists no-show employees.	Session Withdrawal Displays a list of employees who registered for sessions and later withdrew their registration, including reasons for withdrawal.
Past Due Displays employees past due training.	Training Progress Pie Chart Displeys a pie chart summary of subordinates' training progress.
Past Requests Displays training requests you have already approved, deferred, or denied. You may change your decision for training that an employee has not yet registered for.	Training Status Summary Displays a summary of how many training items each employee has that are not started, in progress, or completed.
Pending Requests Displays outstanding training requests you must approve, defer, or deny.	Transcripts Displays transcripts of employees for whom you are the approver, manager, or cost center approver.
Records Displays user data, transcripts for individual employees.	

Each report has fields that need to be chosen or filled in for the report to run. Please click on the report to view the field to choose. For additional help, click on Help on the drop down menu under the circle in the upper right hand corner of the screen.

• No Show Details – displays attendance and no-shows per sessions of a class/event.

Core Leadership	Program							
Start Date / Time 12/1/2007 9:00 10/11/2007 8:0 8/1/2007 9:00 4	AM MA 0	Eccation The Water Garden California The Water Garden	Required Parts 1 4 1	Attendees 1 0 10	No Shows 1 1 1	Attendance Rate 0% 0% 0%	Price Per Person \$0.00 \$0.00 \$0.00	Total No Show Cost \$0.00 \$0.00 \$0.00
REPORT CRITERI	IA							
Start Date: End Date: Event	12/1 Core	2007 .0/2007 • Leedership Program						
Location: Provider: Report Generate	All							

• **Past Due** – displays trainings that employees have in progress or past due.

USER U	SER 10 TYPE	TITLE	VERSIO	N DIVISION/POSITION	TRAINING PROVIDER	STATUS	REGISTERED DATE
Admin, CES		Nev Hire Cumpulum - Convergence	7.0	CyberU: CEO	ABC Corporation Training10	In Progress / Part Due	5/2/2007
Uribe, Christina		Nev Hire Curriculum - Convergence	7.0	Comerstone OnDemands Instructor	ABC Corporation Training10	In Progress / Part Due	5/6/2007
1, Admin		Nev Hire Curriculum - Convergence	7.0	ABC Corporation 1/ Administrator	ABC Corporation Training10	In Progress / Part Due	5/2/2007
2. Admin		Nex Hire Curticulum - Convergence	7.0	ABC Corporation 2: Administrator	ABC Corporation Training10	In Progress / Part Due	5/2/2007
3, Admin	Curriculum	Nev Hire Cuntoulum = Convergence	7.0	ABC Corporation 3: Administrator	ABC Corporation Training10	In Progress / Part Due	5/2/2007
4, Admin	Curriculuro	Nev Hire Curriculum - Convergence	7.0	ABC Corporation 4: Administrator	ABC Corporation Training10	In Progress / Part Due	5/2/2007
5, Admin	Curriculum	Nev Hire Curriculum - Convergence	7.0	ABC Corporation 5: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
6. Admin	Curriculum	Nex Hire Curriculum - Convergence	7.0	ABC Corporation 6: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
7, Admin	Curriculum	Nev Hire Curriculum - Convergence	9.0	ABC Corporation 71 Administrator	ABC Corporation Training10	In Progress / Part Due	5/2/2007
8, Admin		New Hire Curriculum - Convergence	7.0	ABC Corporation 8: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
9, Admin	Guniculum	Nev Hire Curriculum - Convergence	7.0	AbC Corporation 9: Administrator	ABC Corporation Training10	In Progress / Part Due	5/2/2007
Jones10, Miranda		New Hire Curriculum - Convergence	7.0	ABC Corporation 10: Director of Sales	ABC Corporation Training10	In Progress / Part Due	5/16/2007
Hagan, Kim		Nex Hire Curriculum - Convergence	7.0	Test: Educational Services Manager	ABC Corporation Training10	In Progress / Part Due	5/1/2007
10. Admin		Nev Hire Curriculum - Convergence	7.0	ABC Corporation 10: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
REPORT CRITERIA	100.00						
Training Type:	All	adum - Antonioner					
Training Titles Start Dates	1/1/2007	oulum - Convergence					
Ind Date:	12/10/2007						
Providen:	all						
Report Generated B	Service and the service of the servi						
Report Date:	12/10/2007						

• **Past Requests** – displays your training requests that have been approved, deferred, and denied, in the past 3 months. By clicking on the details button, you can change your approval or denial.

Past Requests View training requests you have already appro	oved, deferred, or denied. You may chan	ge your decision for training that an employee has not yet registered for.			
💫 Printable Version 🛛 💥 Export to	Excel				
Search Results					
NAME	ТҮРЕ	TRAINING	ACTION	DATE	DETAILS
Armstrong	Material	CAPS - Emotional Intelligence Book	Registered	8/23/2016	Details
Armstrong	Session	How to Make Friends and Influence People	Denied	8/23/2016	Details
Brown	Material	CAPS - Emotional Intelligence Book	Registered	8/23/2016	Details
Brown	Event	How to Make Friends and Influence People	Approved	8/23/2016	Details
Patty	Material	CAPS - Emotional Intelligence Book	Registered	8/23/2016	Details
Patty	Session	How to Make Friends and Influence People	Registered	8/23/2016	Details

• **Pending Requests** – displays the training requests that are pending. The same screen as View Pending Requests.

	prove, defer, or deny. Deferring a request will send the request half, you may share your approving permissions for users for w		n for that employee. Click on the	employee's name to vie	w their transcript. If you
Cost Center Approver					
Training Pending Approval					
Printable Version X Export to Excel	Search				(2 Results)
Requested By	Training	Туре	Date	Purpose	Options
Bhasker , Shalini 🥩 East (Division) Administrative Assistan/Executive Secretary (Fa	amiliar Job Title)	Completion	7/23/2012 10:58 AM		<i>∢                                    </i>
Bhasker, Shalini 🥩 East (Division) Administrative Assistant/Executive Secretary (Fa	General Company Information	Initial	7/23/2012 11:19 AM	Job Specific	<i>∢ &amp;</i> x
Bhasker , Shalini 🥩 East (Division) Administrative Assistant/Executive Secretary (Fa	amiliar Job Title)	Certification Approval	8/16/2012 12:23 PM		*
Bhasker, Shalini 💋 East (Division) Administrative Assistant/Executive Secretary (Fa	amiliar Job Title)	Completion	8/16/2012 12:23 PM		<i>√                                    </i>
« Back					

• **Records** – displays employee data and transcript information for members of your team

Records						
isplays user data, transcripts for inc	dividual employe	es.				
Employee Records						
Choose User : Bates, Tim	iothy 🖌	0 👼				
Display : 🗹 User D	ata Transcri	ipt				
Removed Training :	e training that w	as removed from the transcrip	t by an administrator			
			,			
ି Sea	rcn					
Summary - Timothy B	ates					
🍃 Printable Version 🛛 💥 Expo	ort to Excel					
User Data						
Email : tbates@corp	p.com					
Phone : 310-510-11	.12					
Fax :						
Division/Position: 477/442						
Cost Center: 508						
Location: 511						
Manager : Moore, Tash						
Approver : Richman, Al	licia					
Required Approvals: 0						
Active : True						
Transcript						
TITLE	ТҮРЕ	PROVIDER	REQUEST DATE	DUE DATE	STATUS	ASSIGNOR
Welcome to the Leadership Development Curriculum	Note	Internal	9/5/2013		Not Started	
Leadership Development Curriculum	Curriculum	Internal	9/5/2013		In Progress	Lolley, Jon
Basics of Effective Selling (Second Edition) (Includes Simulation)	Online Class	Element K	6/14/2013		Registered	Moore, Tasha
10 Secrets of Time Management for Salespeople: Gain the Competitive Edge and Make Every Second Count		External Training	3/4/2013		Registered	Lolley, Jon
A Roles of Leadership	Session	EMEA Provider	12/3/2012		Registered	Lolley, Jon
Roles of Leadership	Event	EMEA Provider	12/3/2012		Not Started	
Meet with an HR Representative	Note	Internal	9/7/2012		In Progress	
Customer Service - How to make every guest feel special	Curriculum	Internal	9/7/2012		In Progress	Moore, Tasha

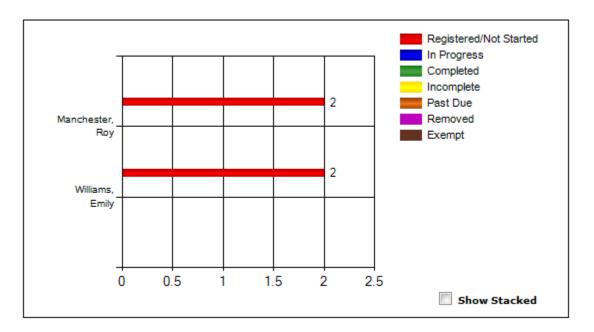
• Session Withdrawal – displays employees who withdrew from a training, including reasons

EMPLOYEE	IDENTIFIER	COST CENTER ID	EVENT NAME	SESSION	SESSION NUMBER	SESSION START DATE	COST OF TRAINING	WITHDRAWAL	WITHDRAWAL	TOTAL COST	REASON
0.0000000000000000000000000000000000000		CC-1	New Hire Orientation	10003		3/28/2003 3:00 AM	\$0.00	2/26/2008 8:26 PM			Removed From Transcript
White, Eric	Corporate Office (Division) Associate (Position)	CC+1	Building the Foundations for Change	10017		7/23/2003 3100 AM	\$100.00	7/14/2003 8:48 PM		\$100.00	No Show
REPORT CRITERIA	6										
Start Date: End Date: Provider:	2/1/2002 2/8/2008 All										
	By: Del Grande, Manola										

• Training Progress Pie Chart – displays a visual pie chart of training progress for your team.

			34.8%. Completed Registered In Progress No Show/Mi Requested Not Registere Past Due	thdrawn		
			6.1% 21.2% 16.7%			
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iearch	Results				1-20 of 66	Nex
Search	Results USER	TYPE	me	TRAINING PROVIDER	1-20 of 66	Next
iearch	Results USER Paik, Grahame	TYPE Sezsion	TITLE Excel XP Advanced	IRAINING PROVIDER Cyberu	1-20 of 66 STATUS Approved	Nex DETAIL
iearch	Results USER Paik: Grahame Paik: Grahame	TYPE Session Session Session	TITLE Excel XP Advanced Eric White's LLT Training	TRAINING PROVIDER CyberU CyberU	1-20 of 66 SIATUS Approved Registered	Nex DETAIL
iearch	Results USER Paik, Grahame Paik, Grahame Wise, Heidi	TYPE Session Session Quick Course	TITLE Excel XP Advanced Eric White's ILT Training Eric White's ILT Training	TRAINING PROVIDER CyberU CyberU CyberU	1-20 of 66 STATUS Approved Registered Registered	Nex DETAIL 2 3 3 3 3 3
iearch	Results USER Paik, Grahame Paik, Grahame Wise, Heidi Paik, Grahame	TYPE Session Session Quick Course Quick Course	TITLE Excel XP Advanced Eric White's ILT Training Eric White's ILT Training "Cut-To-The-Chase" with Top Decision Makers	TRAINING PROVIDER CyberU CyberU CyberU You Achieve.com	1-20 of 66 STATUS Approved Registered In Progress	V Nex
iearch	Results USER Paik, Grahame Paik, Grahame Wise, Heidi Wise, Heidi	TYPE Session Session Quick Course Quick Course	IIIIE           Excel XP Advanced           Eric White's ILT Training           Eric White's ILT Training           "Cut-To-The-Chase" with Top Decision Makers           "Cut-To-The-Chase" with Top Decision Makers	TRAINING PROVIDER CyberU CyberU CyberU You Achieve.com You Achieve.com	1-20 of 66 STATUS Approved Registered In Progress Registered	Nex DETAIL
iearch	Results USER Paik, drahame Paik, drahame Wise, Heidi Paik, Grahame Wise, Heidi Mikia, Sel-	TYPE Session Session Quick Course Quick Course Collec Clore Session	IIIIE         Excel XP Advanced         Eric White's ILT Training         Eric White's ILT Training         "Cut-To-The-Chase" with Top Decision Makers         "Cut-To-The-Chase" with Top Decision Makers         "substance Exectediar_and Einserial Dispation (Einserial Exected Exected area)	TRAINING PROVIDER CyberU CyberU You Achieve.com You Achieve.com	1-20 of 66 STATUS Approved Registered In Progress Registered Part Para	V Nex DETAIL S
iearch	Results USER Paic, drahame Paic, drahame Wise, Heidi Mise, Heidi Wise, Heidi	TYPE Session Session Quick Course Quick Course Session Quick Course	TITLE Excel XP Advanced Eric White's LLT Training Eric White's LLT Training "Cut-To-The-Chase" with Top Decision Makers "Cut-To-The-Chase" with Top Decision Makers "Cut-To-The-Chase" with Top Decision Makers "Cut-To-The-Chase" with Top Decision Makers "Eric White's LLT Training	TRAINING PROVIDER CyberU CyberU You Achieve.com You Achieve.com - stin-4 CyberU	1-20 of 66 SIATUS Approved Registered Registered In Progress Registered Aget hun Registered	V Nex DETAIL 9 ] 9 ] 9 ] 9 ] 9 ] 9 ] 9 ] 9 ] 9 ] 9 ]
ALLINES	Results USEB Paik: Grahame Paik: Grahame Wise, Heidi Paik: Grahame Wise, Heidi Paik: Grahame	TYPE Session Session Quick Course Cultor Charse Session Quick Course Quick Course	Time           Excel XP Advanced           Eric White's LLT Training           Eric White's LLT Training           "Cut-To-The-Chase" with Top Decision Makers           "Cut-To-The-Chase" with Top Decision Makers           Financhasek Evaluation Evaluation Decision Makers           Tence White's LLT Training           "Cut-To-The-Chase" with Top Decision Makers	TRAINING PROVIDER CyberU CyberU CyberU You Achieve.com CyberU You Achieve.com	1-20 of 66 SIATUS Approved Registered Registered Page Page Registered In Progress Registered In Progress	V Nex DETAIL 2.1 2.1 2.1 2.1 2.1 2.1 2.1 2.1 2.1

• Training Status Summary – displays training progress in a linear chart format.



• **Transcripts** – displays an employee's transcript by directing you to the employee's transcript page.

#### • Additional Help -

https://help.csod.com/help/csod\_2/Content/Reporting/Standard\_Reports/Track\_Employees/ Track\_Employee\_Reports\_Overview.htm?tocpath=Analytics%7CStandard%20Reports%7CTrack% 20Employees%7C\_\_\_\_0

# Troubleshooting

- **Pop-up Blocker** Not all, but some computers may have difficulty with pop-ups. To enable pop-ups (this could be different depending upon the search engine). While in your search engine, go to Internet Options, Privacy, unclick Pop-up Blocker.
- **Excel** some computers may have difficulty printing documents that are uploaded to Excel from the system. To fix this problem:
  - 1. In Excel, click on the File tab, and then on Options
  - 2. In the Excel Options menu, click on the Trust Center option item.
  - 3. Click on the Trust Center Settings button.
  - 4. In the Trust Center, go to the Protected View option.
  - 5. Unselect the 3 Enable Protected Views in the options screen.

#### Protected View

Protected View opens potentially dangerous files, without any security prompts, in a restricted mode to help minimize harm to your computer. By disabling Protected View you could be exposing your computer to possible security threats.

Enable Protected View for files originating from the Internet

Enable Protected View for files located in potentially unsafe locations ()

- Enable Protected View for Outlook attachments
- Contact Us Check the Contact Us page on your Welcome Page as to who to contact for help.