WELCOME TO THE STATE OF VERMONT'S SOV 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):

Login

The login page for SOV LINC is: https://vermont.csod.com

In the blue box (on the bottom right side of the login page):

*Enter your **User Name or Email Address***: (for most users, your email address)

*Enter your **Password***: (this will be sent via email on your "Go Live" date)

Once you have signed in, the screen will change to your personal training home page, otherwise known as the Welcome Page.

If you forgot your password or need a password reset, please use the contact information to the left of the blue box.

Welcome Page

1 **Navigation Tab** – All users have at least 3 tabs (that include drop down menus) “Home”, “Learning" and “Contact Us”. ***Hover*** (don’t click) over each tab for drop-down menus to appear.

- **Home**. There are two menus under **Home**: “Welcome” and “Universal Profile”.
  - “Welcome” brings users back to the “Welcome” page.
  - “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.
- **Learning**. There are three menus under Learning: “View Your Transcript”, “Events Calendar”, and “Browse for Training”.
  - “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.
- **Contact Us**. This tab has one drop-down, “CAPS-Contact Us.” This page provides information about CAPS including location and driving directions, and phone numbers, as well as links to DHR social media connections.

2 **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.

3 **Universal Profile/Sign Out** – 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.

- **Log Out** allows users to logout of the system.

4 **Announcements** – This shaded box shares messages about the system and upcoming trainings across the state.

5 **Buttons** – Each of these four buttons are a direct link to different programs and trainings within CAPS.
  - **Browse All Classes** provides a search function for classes, as does the "Search Bar".
  - **Supervisory Training** contains information about the classes CAPS provides connected to being a supervisor, starting with Stepping Up to Supervision through the different levels of Supervising in State Government (SSG) classes.
  - **Vermont Certified Public Manager® Program** contains details about the VCPM program.
  - **Consulting and Custom Training** provides users across the state information related to custom trainings and consulting support that CAPS provides.

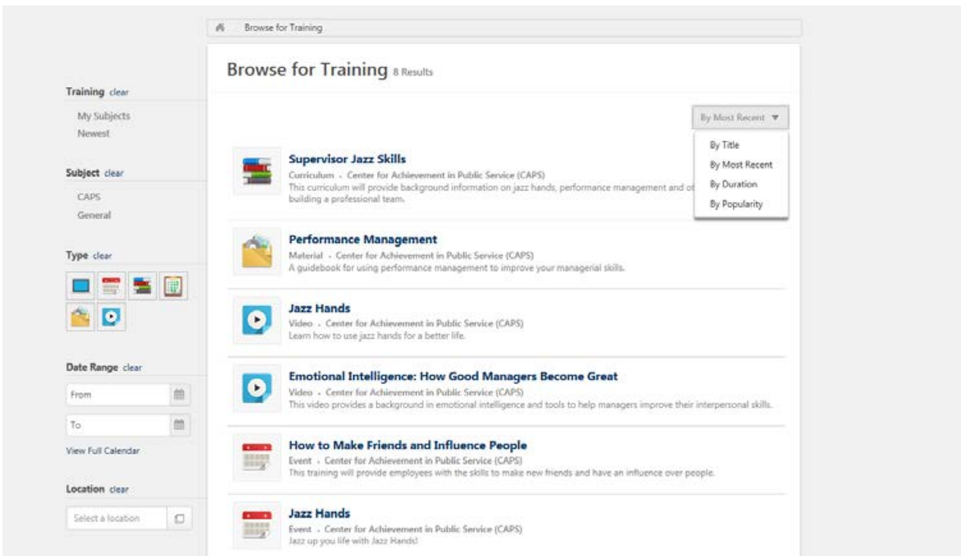
6 **New Trainings Just Added!** -This ***widget*** provides a list of upcoming trainings that users may be interested in attending.

7 **My Inbox** – This ***widget*** contains information that users, including the number of trainings they have been approved and registered for, classes that managers need to approve and other pending requests.

8 **My Upcoming Trainings** – This ***widget*** displays classes that users are registered for, in addition to classes that have been assigned to them. From here, users can also withdraw from classes, select sessions for classes that have been assigned and view upcoming due dates.

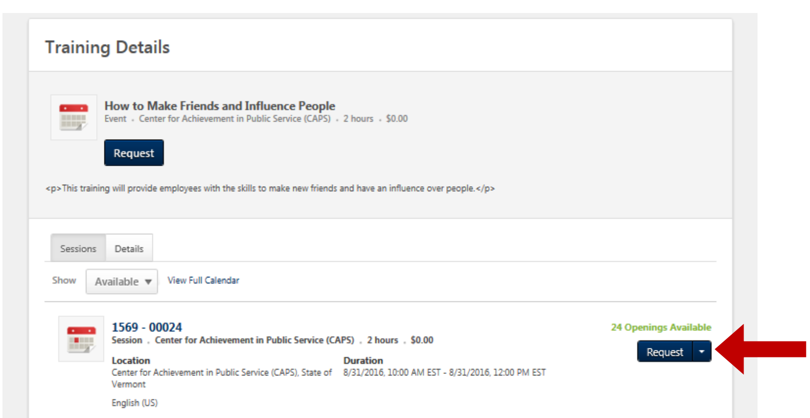
Browsing and Registering for Trainings

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**.

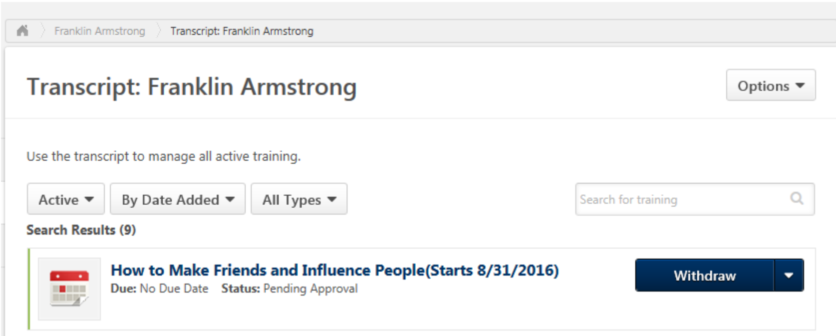


3. When users find a training they are interested in, they can click on the title of the training. Users will see the box below. The top box provides a description of the training. Below this, you will see available sessions, including the location, date, duration and number of spots available.

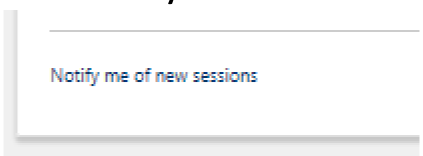
    To request a training, users choose the training date and location that works for their schedule then click the request button.



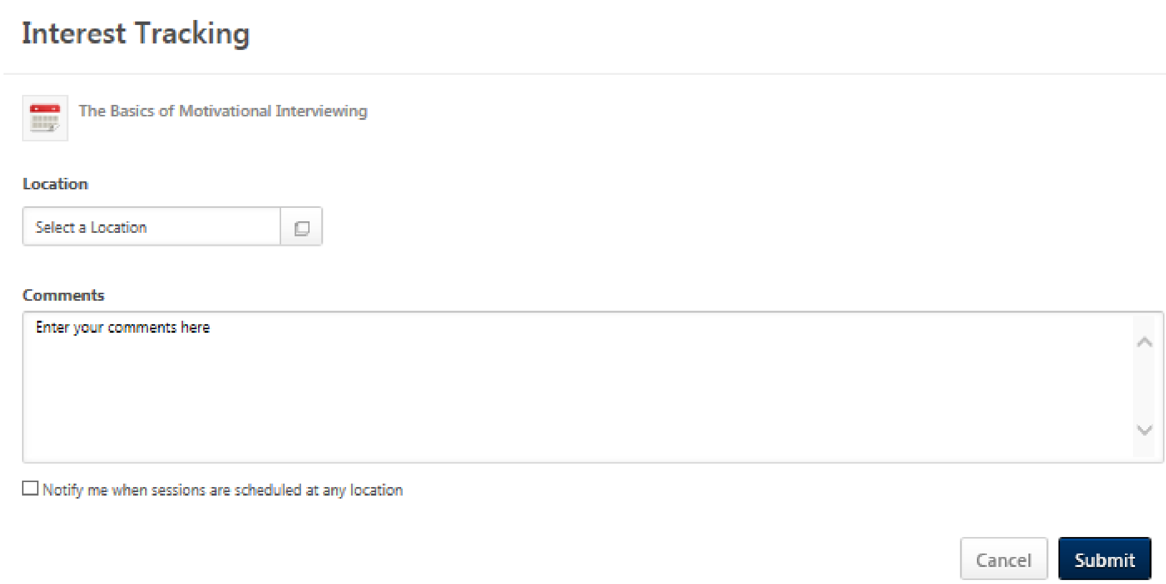
4. Once the user has requested training, the user's screen will change to the one below. The system will then generate an email to the user's supervisor for approval.



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.

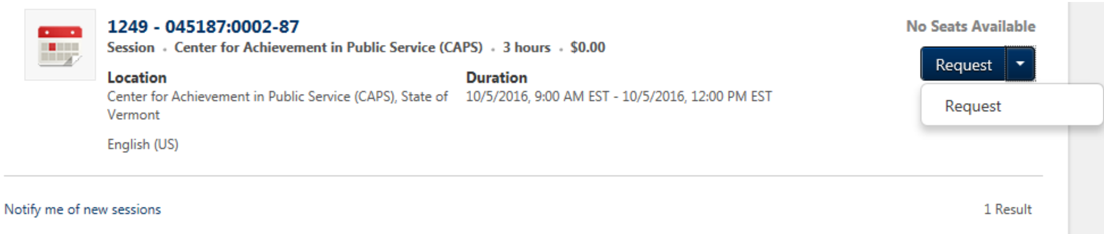


This will allow the user to express an interest in the training and be notified when new sessions are scheduled. As seen below, users can select a location, add comments and also click the box at the bottom, "Notify me of when sessions are scheduled at any location."

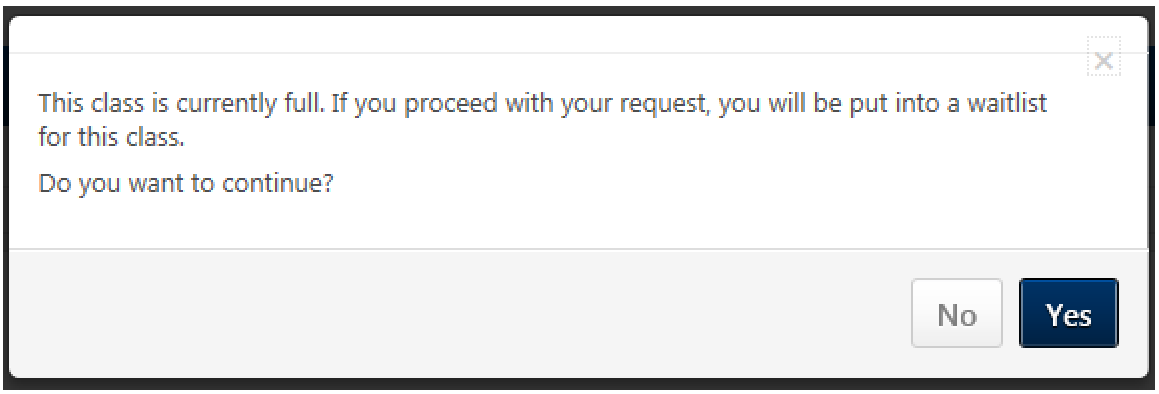


OR

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

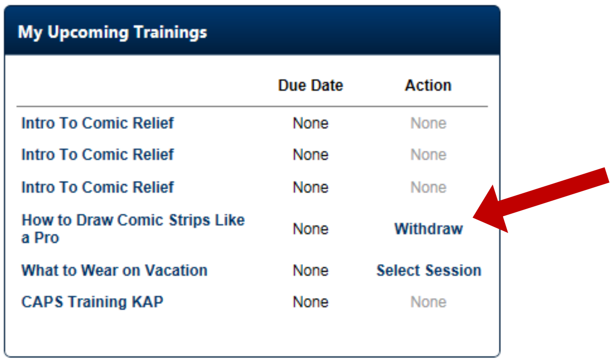


The following window will pop up. Click “Yes.” You will then be added to the waitlist for the session and be informed when an opening is available.

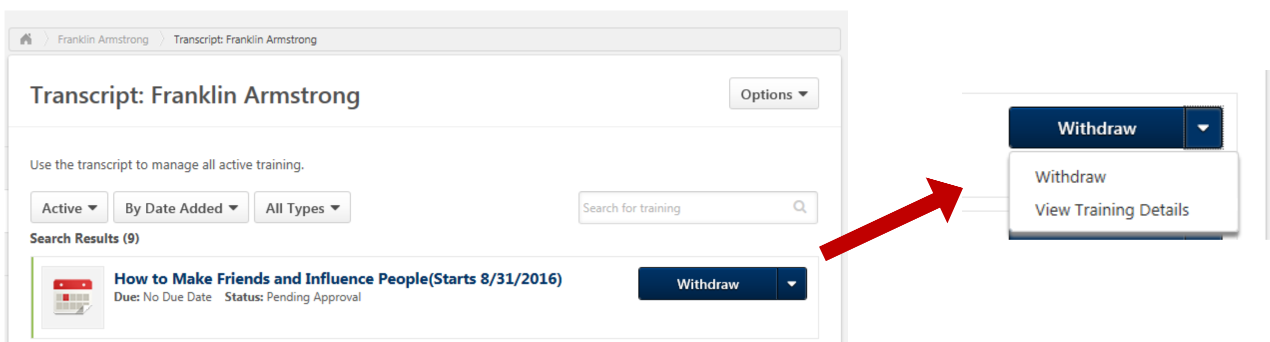


Withdraw Registration

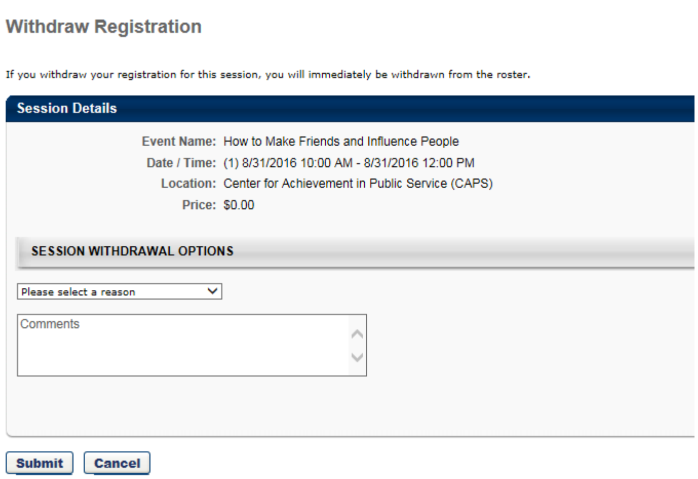
1. If a user is unable to attend a training, the user should login to the system and cancel/withdraw their registration for a class as soon as possible. Users will find a Withdraw link located in a few places. First users will see the Withdraw link or button on the Welcome Page in the “My Upcoming Training”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



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.



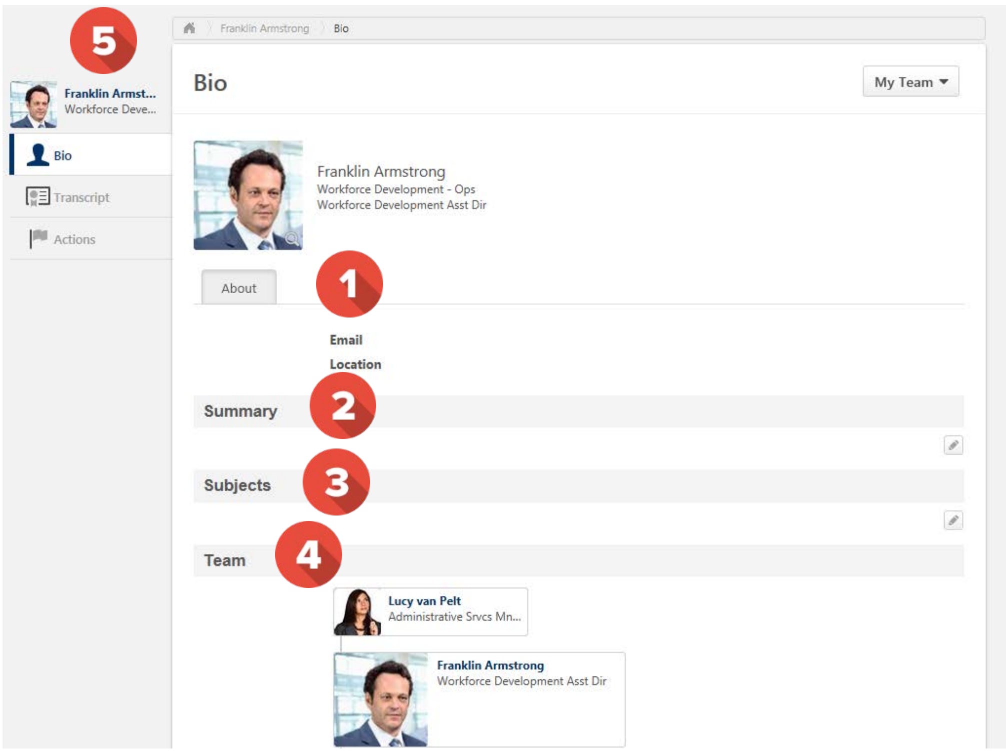
3. When users click on Withdraw, the box below will pop up. Select one of the reasons provided in the drop down box and write in a comment. After the user clicks on Submit, their status for the class will be “Withdrawn.” If users don’t Withdraw from the class and don’t show up, they will be in “No Show”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



Universal Profile and My Account

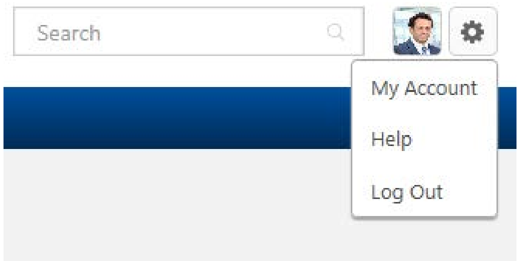
1. The “Universal Profile” can be found in the upper right hand corner of the “Welcome Page” (the image of the person).

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

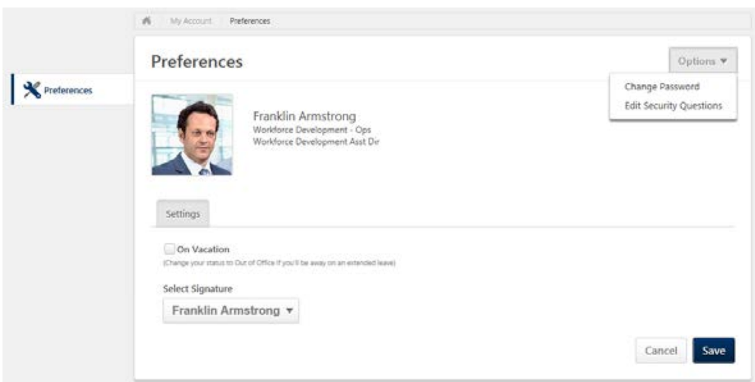


- 1 **About** – This section includes the users email and location. This information is generated by a feed from the VTHR system.
- 2 **Summary** – Users may create a professional bio about their work history, skills and current projects in this section by clicking on the box on the right hand side of this section.
- 3 **Subjects** – Users may choose from a provided list, areas in which they have an interest or skill.
- 4 **Team** – This section allows all users to see the hierarchy with their Supervisor.
- 5 **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 here.
    - “Actions Tab” allows users to select sessions, withdraw from a training or view training details.

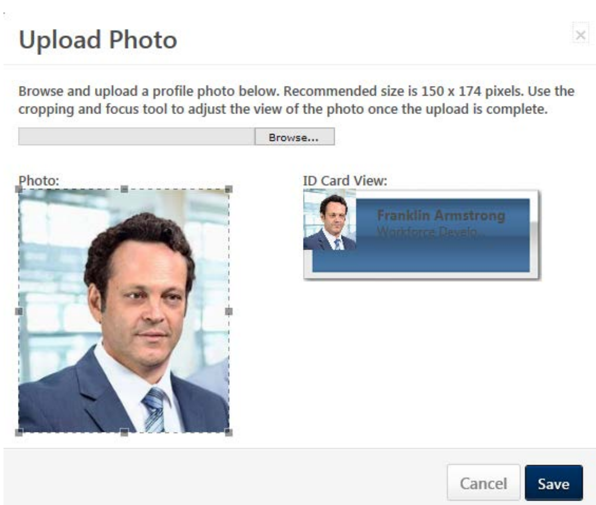
3. Click on the circle next to the image in the upper right hand corner on the “Welcome Page”; users will find the following Menu (My Account, Help, Log Out).



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.



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.

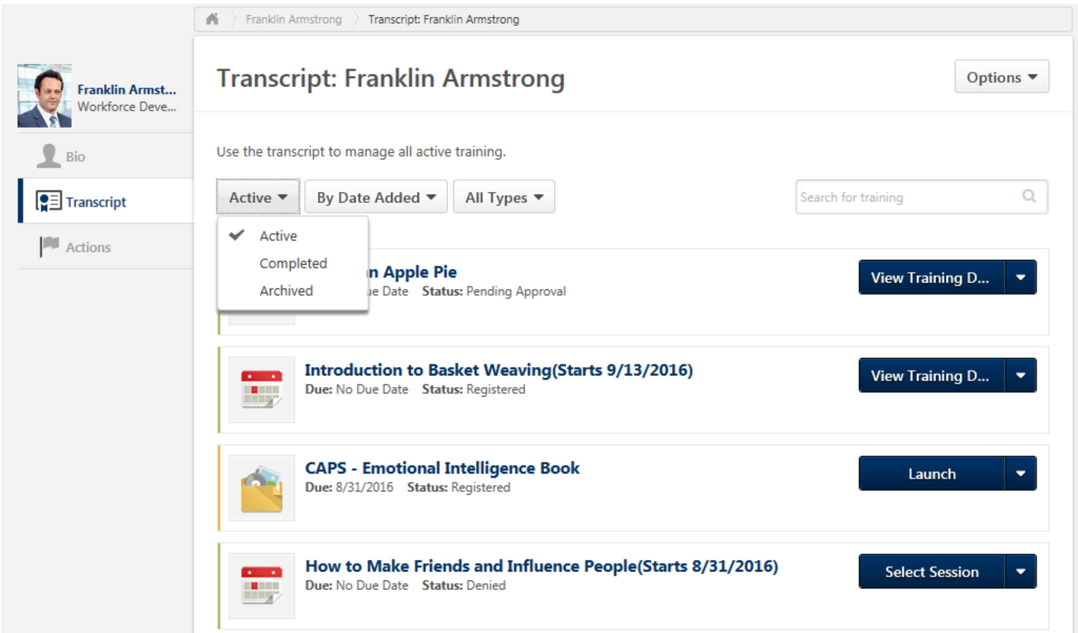


6. Click on “Browse” and choose a picture to upload. Use the photo box to move the image and click Save. The image should show up in “Universal Profile”.

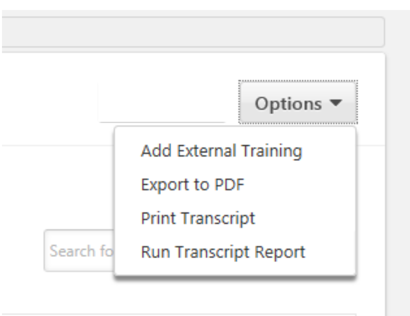
Transcript

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.



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.



- **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.

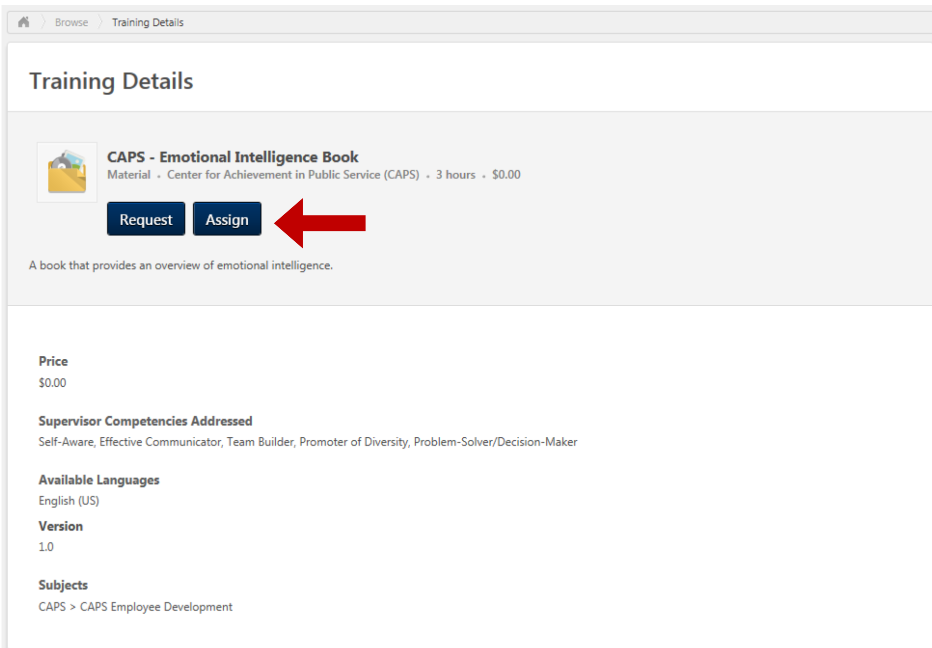
Supervisory Functions

Assign Training

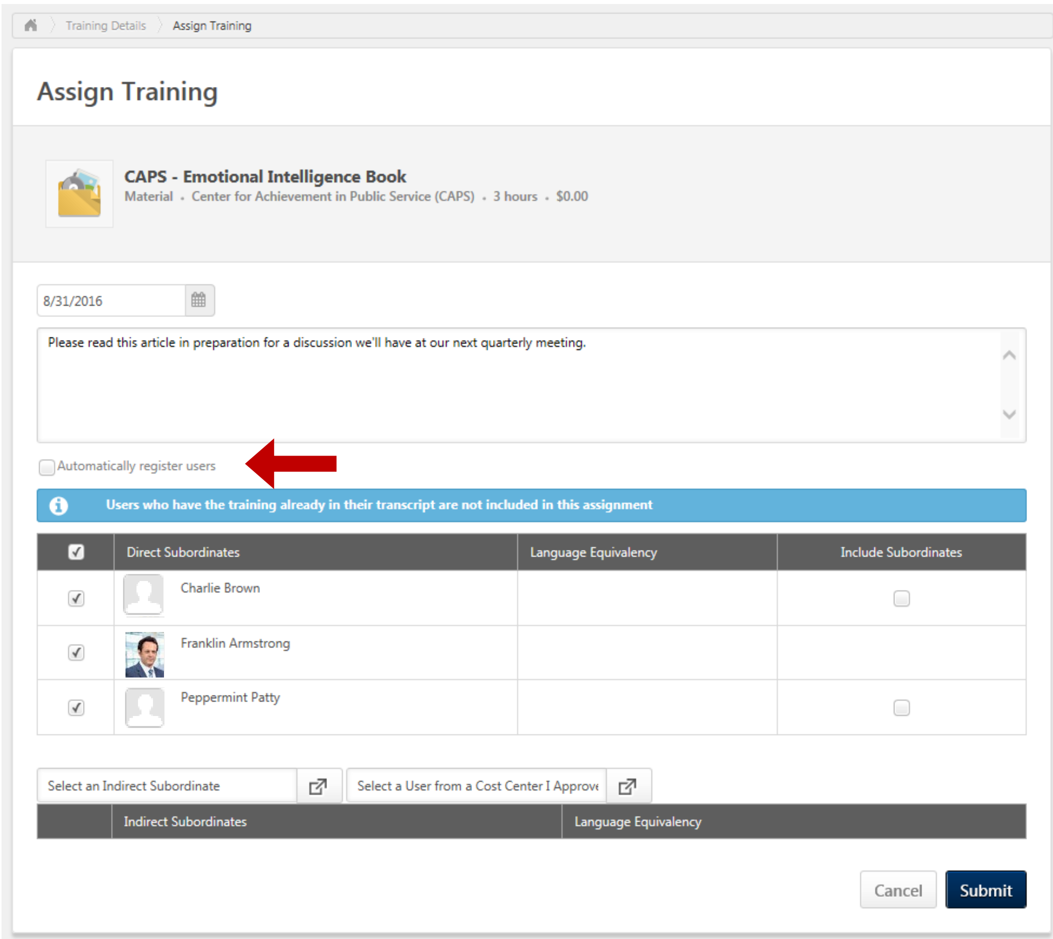
A feature of SOV LINC allows managers and supervisors to assign trainings to their entire team, as well as individual members of their team. *The Department of Human Resources highly encourages managers and supervisors to follow the best practice of talking with their team about the training and the 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:

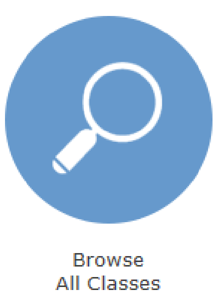
1. Hover over Learning, and click on "Browse for Training". When you find a training, material or other learning object that you would like to assign to your team, click on the title. When the training opens, you will see two buttons, one that says Request (this is for you to request the training for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



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.



3. You can also click on the "Browse All Classes" button on the Welcome Page to look for classes and assign them from there.

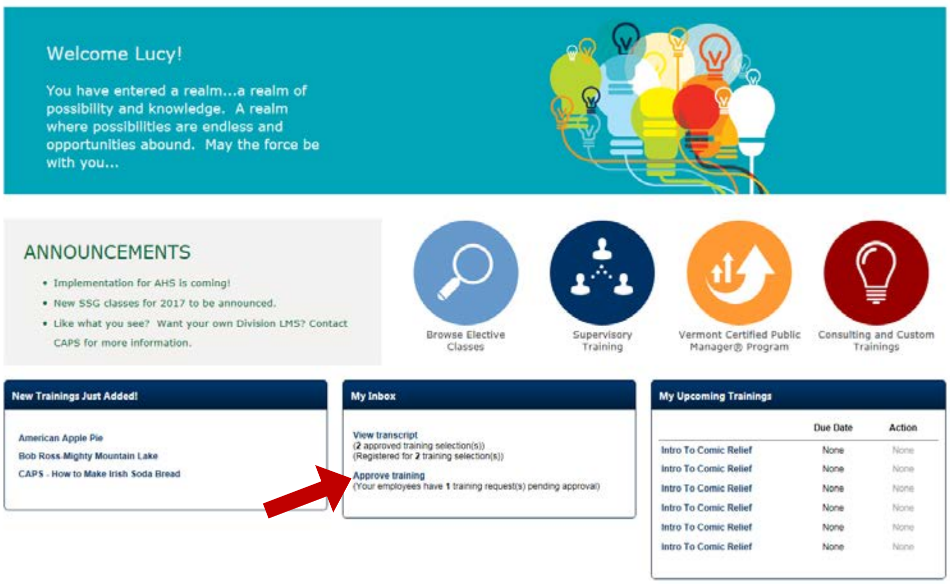


Approve Training

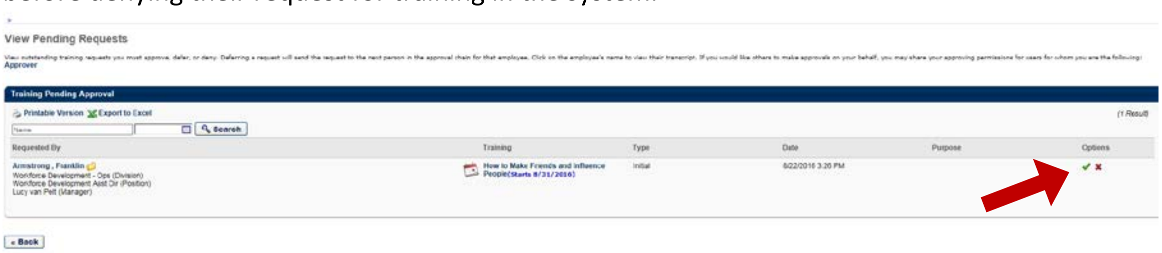
A new managerial task with SOV LINC will be the opportunity to approve all trainings your team members register for in the system. All trainings will require your approval before employees can be registered for the class. ***It is very important that you respond to these requests timely***.

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.

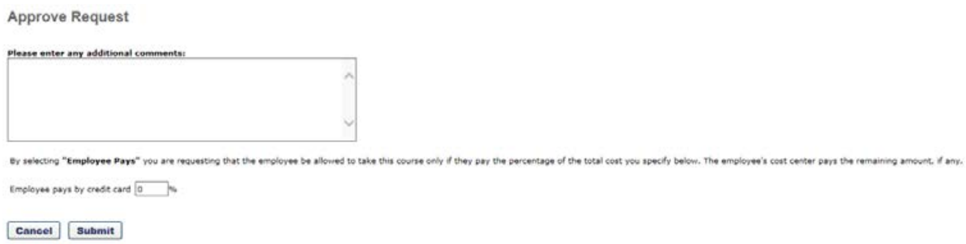
1. On the "Welcome Page", in "My Inbox", you will see **Approve** training. This link lists the number of trainings requests that are pending your approval. Click on the link, "Approve Training".



2. On the following screen, you will see the employee requesting approval, the name of the training or learning object, and the date. 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.



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.*



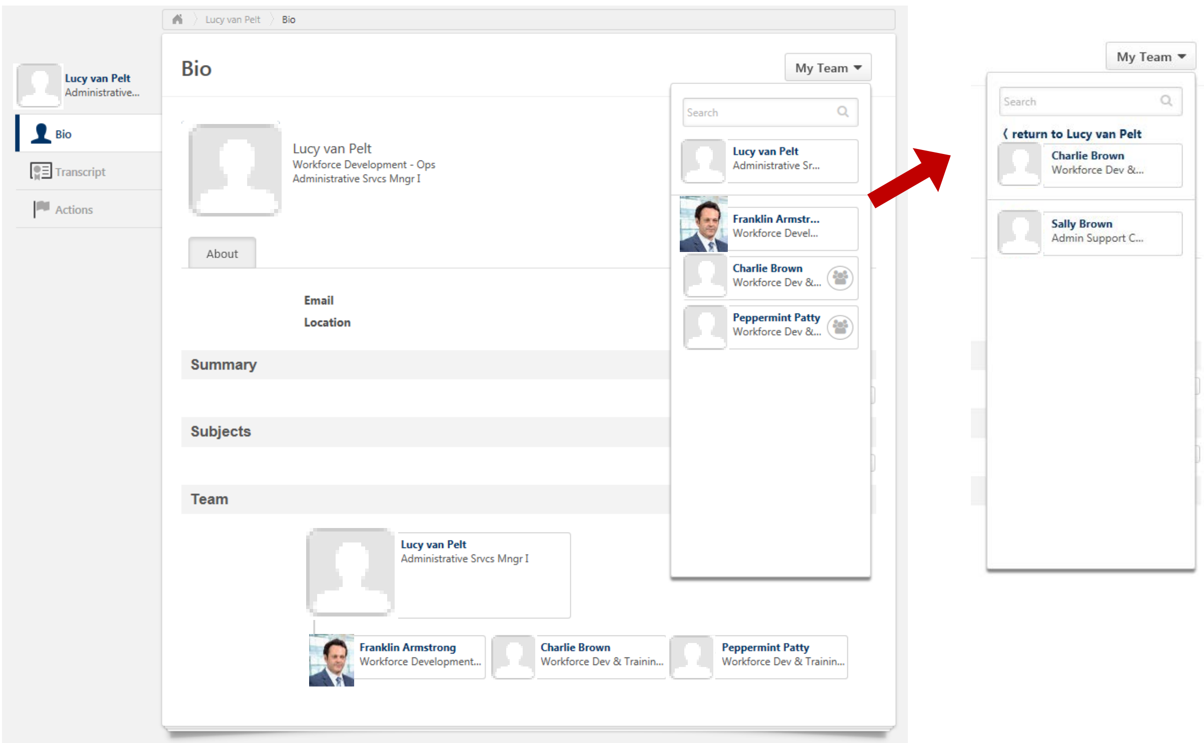
b. When you deny the request, the system will generate a box for comments. Click Submit. You will then be brought back to the "View Pending Requests" screen.

3. You can also approve training through "Manage Employee Learning". Click on "Learning", **Manage Employee Learning**. You will see this screen. Click on "Manage Pending Requests". The **View Pending Requests** screen will pop up as stated above.

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

My Team View

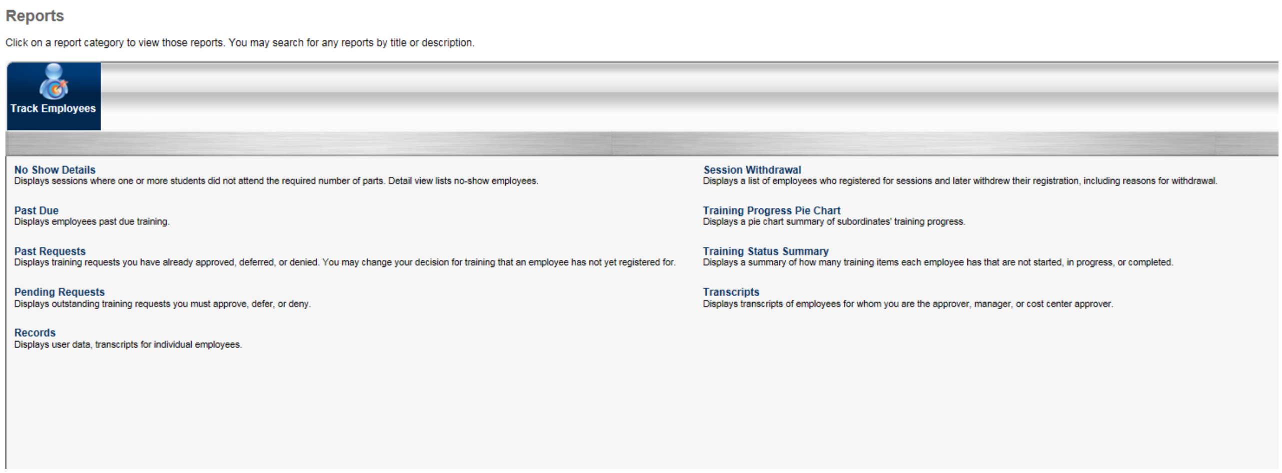
Under “Universal Profile” (click on the picture in the upper right hand corner of the screen), at the bottom of the screen, the supervisor will see themselves and their team. If the supervisor clicks on the drop down box in the upper right corner, they will also see their entire team . Any members of 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.



Reports

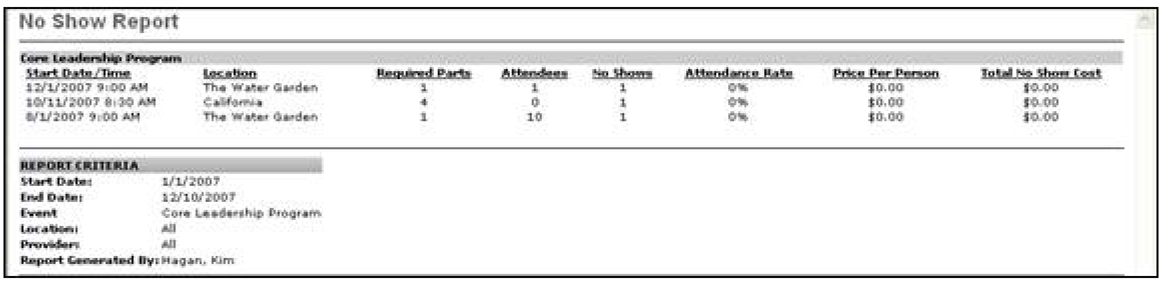
SOV-LINC has a range of reports that are useful to managers and supervisors. These reports can help supervisors track employee training progress, look at employee training transcripts and track employee attendance.

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



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.



No Show Report

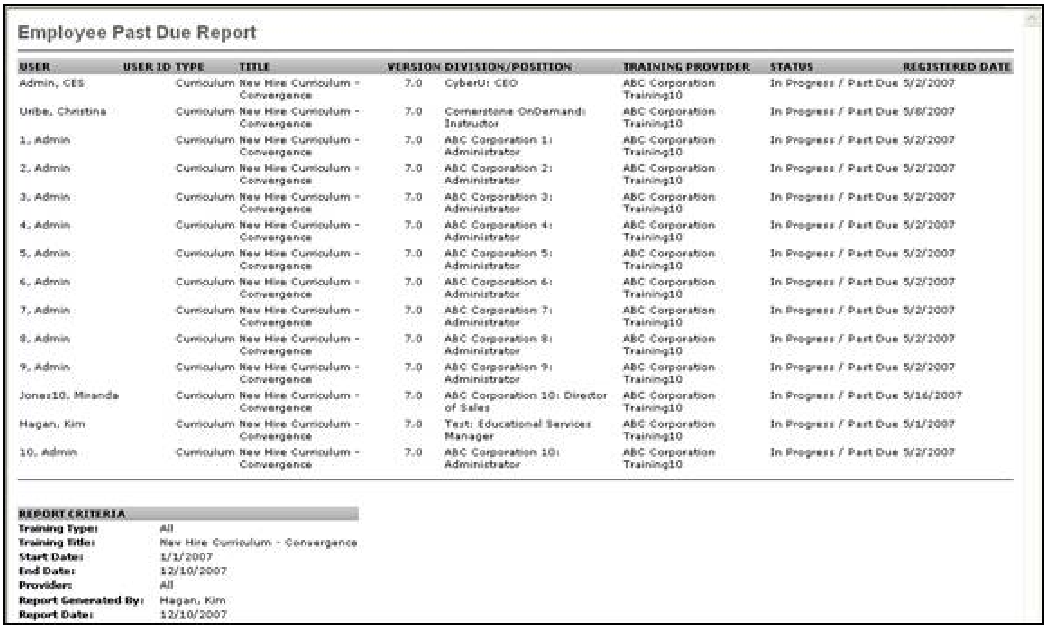
Core Leadership Program

Start Date/Time	Location	Required Parts	Attendees	No Shows	Attendance Rate	Price Per Person	Total No Show Cost
12/1/2007 9:00 AM	The Water Garden	1	1	1	0%	$0.00	$0.00
10/11/2007 8:30 AM	California	4	0	1	0%	$0.00	$0.00
8/1/2007 9:00 AM	The Water Garden	1	10	1	0%	$0.00	$0.00

REPORT CRITERIA

Start Date:	1/1/2007
End Date:	12/10/2007
Event	Core Leadership Program
Location:	All
Provider:	All
Report Generated By:	Hagan, Kim

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



Employee Past Due Report

USER	USER ID	TYPE	TITLE	VERSION	DIVISION/POSITION	TRAINING PROVIDER	STATUS	REGISTERED DATE
Admin, CES		Curriculum	New Hire Curriculum - Convergence	7.0	CyberU: CEO	ABC Corporation Training10	In Progress / Past Due	5/2/2007
Uribe, Christina		Curriculum	New Hire Curriculum - Convergence	7.0	Cornerstone OnDemand: Instructor	ABC Corporation Training10	In Progress / Past Due	5/8/2007
1, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 1: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
2, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 2: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
3, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 3: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
4, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 4: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
5, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 5: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
6, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 6: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
7, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 7: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
8, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 8: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
9, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 9: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007
Jones10, Miranda		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 10: Director of Sales	ABC Corporation Training10	In Progress / Past Due	5/16/2007
Hagan, Kim		Curriculum	New Hire Curriculum - Convergence	7.0	Test: Educational Services Manager	ABC Corporation Training10	In Progress / Past Due	5/1/2007
10, Admin		Curriculum	New Hire Curriculum - Convergence	7.0	ABC Corporation 10: Administrator	ABC Corporation Training10	In Progress / Past Due	5/2/2007

REPORT CRITERIA

Training Type:	All
Training Title:	New Hire Curriculum - Convergence
Start Date:	1/1/2007
End Date:	12/10/2007
Provider:	All
Report Generated By:	Hagan, Kim
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

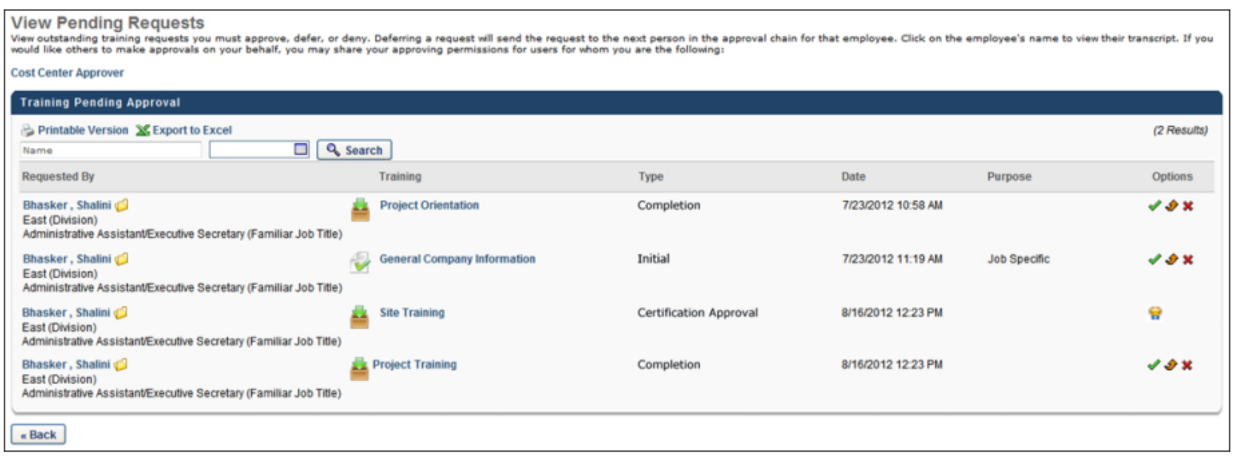
View training requests you have already approved, deferred, or denied. You may change your decision for training that an employee has not yet registered for.

Printable Version Export to Excel

Search Results

NAME	TYPE	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	8/22/2016	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.



View Pending Requests

View outstanding training requests you must approve, defer, or deny. Deferring a request will send the request to the next person in the approval chain for that employee. Click on the employee's name to view their transcript. If you would like others to make approvals on your behalf, you may share your approving permissions for users for whom you are the following:

Cost Center Approver

Training Pending Approval

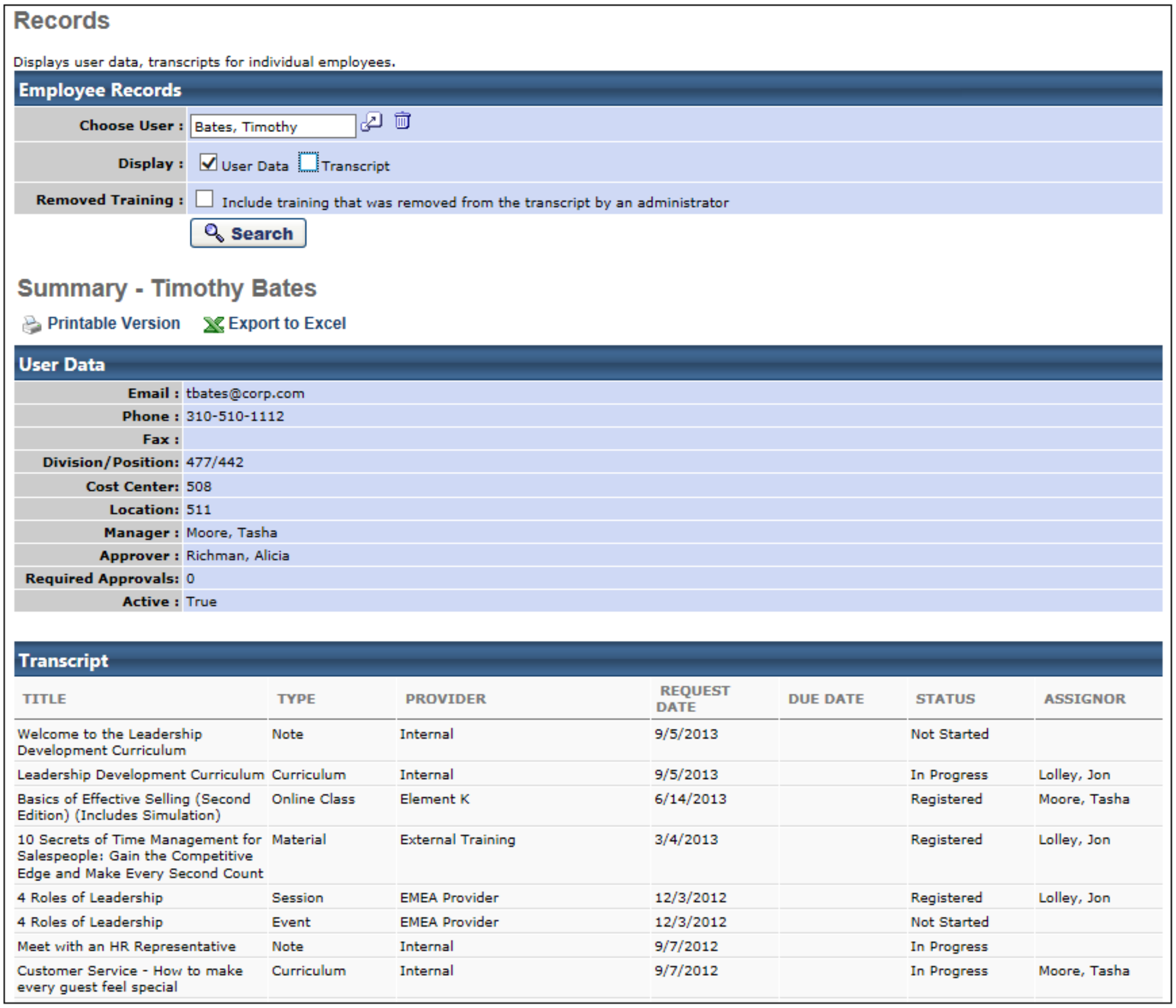
Printable Version Export to Excel (2 Results)

Name Search

Requested By	Training	Type	Date	Purpose	Options
Bhasker , Shalini East (Division) Administrative Assistant/Executive Secretary (Familiar Job Title)	Project Orientation	Completion	7/23/2012 10:58 AM		
Bhasker , Shalini East (Division) Administrative Assistant/Executive Secretary (Familiar Job Title)	General Company Information	Initial	7/23/2012 11:19 AM	Job Specific	
Bhasker , Shalini East (Division) Administrative Assistant/Executive Secretary (Familiar Job Title)	Site Training	Certification Approval	8/16/2012 12:23 PM		
Bhasker , Shalini East (Division) Administrative Assistant/Executive Secretary (Familiar Job Title)	Project Training	Completion	8/16/2012 12:23 PM		

« Back

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



Records

Displays user data, transcripts for individual employees.

Employee Records

Choose User :	Bates, Timothy
Display :	☑ User Data ☐ Transcript
Removed Training :	☐ Include training that was removed from the transcript by an administrator

Search

Summary - Timothy Bates

Printable Version Export to Excel

User Data

Email :	tbates@corp.com
Phone :	310-510-1112
Fax :	
Division/Position:	477/442
Cost Center:	508
Location:	511
Manager :	Moore, Tasha
Approver :	Richman, Alicia
Required Approvals:	0
Active :	True

Transcript

TITLE	TYPE	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	Material	External Training	3/4/2013		Registered	Lolley, Jon
4 Roles of Leadership	Session	EMEA Provider	12/3/2012		Registered	Lolley, Jon
4 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

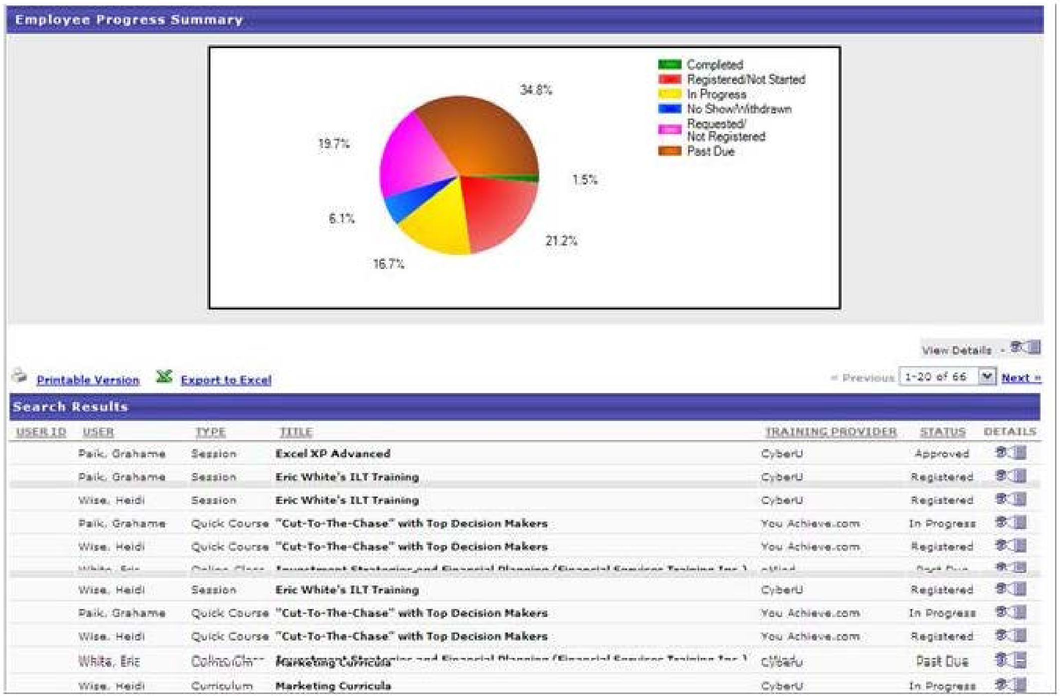
Session Withdrawal Report

EMPLOYEE	IDENTIFIER	COST CENTER ID	EVENT NAME	SESSION LOCATOR	SESSION NUMBER	SESSION START DATE	COST OF TRAINING	WITHDRAWAL DATE	WITHDRAWAL PENALTY	TOTAL COST	REASON
Cavanaugh, Peter	Marketing (Division) Associate (Position)	CC-1	New Hire Orientation	10003		3/28/2003 3:00 AM	$0.00	2/26/2008 8:26 PM	$0.00	$0.00	Removed From Transcript
White, Eric	Corporate Office (Division) Associate (Position)	CC-1	Building the Foundations for Change	10017		7/23/2003 3:00 AM	$100.00	7/14/2003 8:48 PM	$0.00	$100.00	No Show

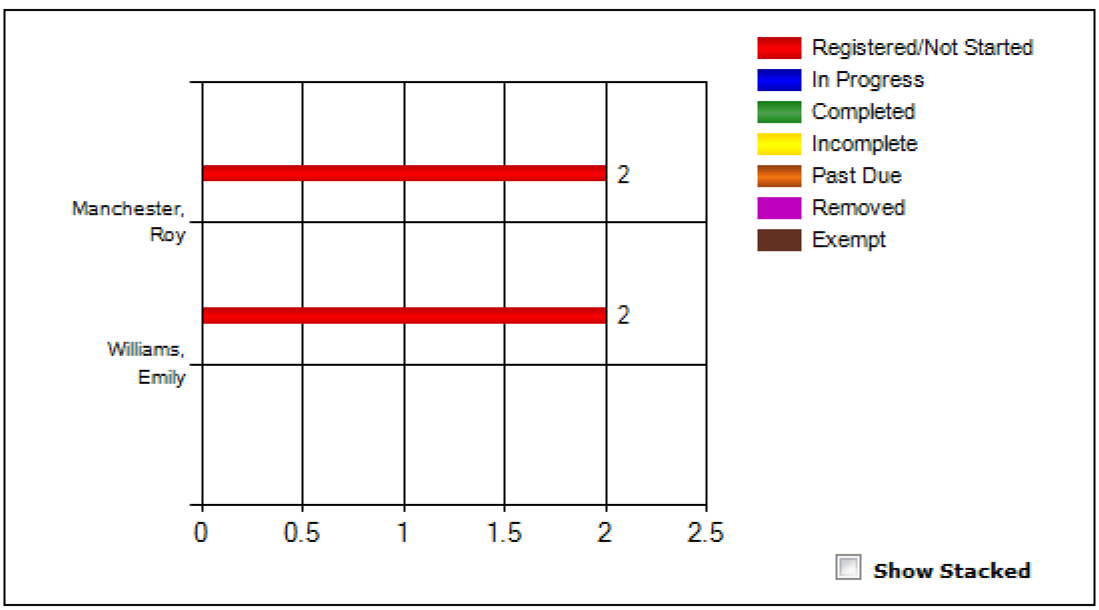
REPORT CRITERIA

Start Date:	2/1/2002
End Date:	2/8/2008
Provider:	All
Report Generated By:	Del Grande, Manola

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



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

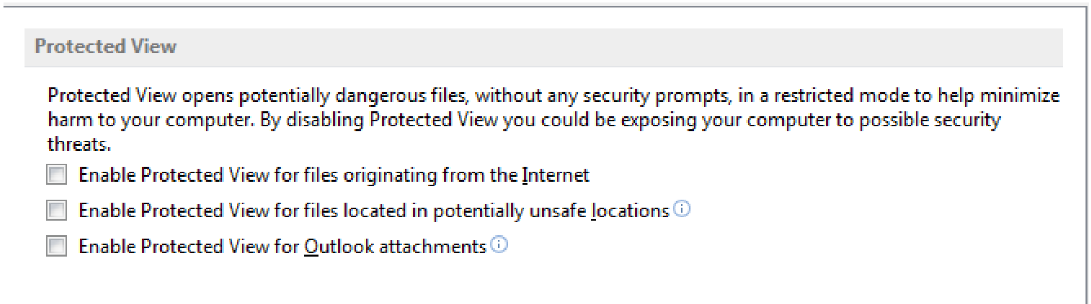


- **Transcripts** – displays an employee's transcript by directing you to the employee's transcript page.

- **Additional Help** - https://help.csod.com/help/csod_2/OnlineHelp.htm#Reporting/Standard_Reports/Track_Employees/Track_Employee_Reports_Overview.htm

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.



- **Contact Us** – Check the Contact Us page on your Welcome Page as to who to contact for help.