

Learning Management System (LMS) SOV LINC User Guide

For End Users and Managers

The goal of this document is to provide instruction and guidance for optimal usage of the State of Vermont Learning Management System (SOV LINC).

**LMS Administrator
10/31/17**

02.05.18

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Quick Reference Guide

The state utilizes a Learning Management System (SOV LINC) to track [employee training efforts](#). This manual is to provide end users and managers SOV LINC best practices. This document is to supplement the SOV LINC User Guide. Please refer to this manual for all SOV LINC How-To needs.

Best Practices for End Users

- Approval is required for all instructor led trainings. Although you may have requested a training, **until it is approved, you do not have a seat in the training**. Be sure to monitor all your training activities. Requesting a training will automatically route an email to your supervisor for approval
- Carefully read all SOV LINC system generated emails. These emails contain information including, registration, approval requirements, training changes (such as date/time) and/or cancellation of a training.
- Remember your security questions and answers. These questions and answers are necessary for users to reset their own passwords. These questions are set up at the time of first log in, however users can update these questions at any time in the Account/Preference page.
- If you cannot attend a training, be sure to 'withdraw' from that training in SOV LINC. Otherwise, your transcript will show a status of 'no show'.
- If job and/or supervisor information is incorrect in your SOV LINC profile, be sure to contact your HR Administrator for assistance and/or information as to any pending VTHR job change.

Best Practices for Managers & Supervisors

- Leverage the 'assign training' feature to assign trainings to your team. This feature allows you to assign to just one individual or assign in mass to the entire team.
- Review the list of employees listed under your team in SOV LINC. If there are employees who should or should not be reporting to you, contact your HR Administrator who can assist in updating that information in the VTHR System.
- Carefully review all SOV LINC system generated notifications. Managers & Supervisors will receive notifications regarding approvals. Prompt approvals ensures your employees have a seat at the training. **Note:** an employee's registration is not complete until approved by a manager/supervisor.
- Use the Reports to track registration, transcripts and training statuses.

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SOV LINC Resources:

- SOV LINC URL: <https://vermont.csod.com/client/vermont/default.aspx>
- Visit the [DHR website](#) to view popular tools for managers and supervisors and useful CAPS resource handouts and recorded webinars.
- Questions, support and/or issues:
 - For AHS employees, AHS.LMSAdmin@vermont.gov
 - For DPS employees, DPS.EMHSTraining@vermont.gov
 - For AOT employees, AOT.VTTCRegistration@vermont.gov
 - For other concerns, dhr.caps@vermont.gov

FAQ's:

- **My Supervisor and/or job information in SOV LINC is not accurate or current?** Supervisor and Job/Position information is fed into the LMS from the VTHR System. If a change has occurred to your job, this information will not be seen in the LMS until after the job change has been processed through VTHR. To check the status of job/position changes in VTHR and/or to correct/update your Supervisor information, please contact your HR Administrator.
- **I am an employee who has two positions, yet only one of my positions is listed in the LMS?** The LMS can only support one record per employee. Employees with multiple jobs (aka multiple positions) will only have one job record listed in the LMS. If you are required to take a training based on one of your positions that is not seen in the LMS, please contact your HR Admin.
- **I can't remember my LMS password?** The quickest most convenient way to reset your own password is to use the LMS password reset feature. When you first logged into the LMS, you had to create security questions and answers. These are the questions and answers necessary to reset your own password. If you do not know your answers, or experience any technical issues with resetting your own password, reach out to your agency's LMS support team. If you are not an employee of AOT, DPS or AHS, contact DHR.CAPS@vermont.gov or VTHRHelpDesk@vermont.gov for assistance.
- **My training was cancelled, but the Outlook meeting invite that I received when I registered did not update?** Although the LMS will send a system generated outlook meeting invite, this invite will not update to reflect changes or cancellations. For all training changes, a notification is sent to the participants. Always review these notifications as they will inform you of the change or cancellation.

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Welcome to the State of Vermont's SOV LINC: Lead, Innovate, Navigate Connect for End Users

Welcome to the training and registration system for the State of Vermont, SOV LINC. This section will provide information on your access as a user.

Logging In

To begin, click on the SOV LINC URL: <https://vermont.csod.com>



1. Enter your use name, which is your @vermont.gov email address.
2. For the initial log in, the password is: P4ssw0rd (the "0" is a zero)
3. Click 'Enter'

Welcome
Please sign in:
[I forgot my password](#)
For password reset assistance:
Contact VTNR at: (855) 828-6700, Option 4
or email VTNR.helpdesk@vermont.gov

A screenshot of the SOV LINC login interface. It has a blue header and background. The form contains two input fields: "User Name or Email Address:" with the text "test.user@vermont.gov" and "Password:" with masked characters "*****". Below the password field is a black "Enter" button. Red circular callouts with numbers 1, 2, and 3 point to the username field, the password field, and the Enter button respectively.

User Name or Email Address: 1
test.user@vermont.gov
Password: 2

Enter 3

For the initial log in, you are required to change your password.

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Change Password

Your password has expired. Please change your password.

The new password must match the following criteria:

- * Passwords must contain both upper and lower case letters
- * Passwords must contain alpha and numeric characters
- * Passwords cannot be the same as the previous 24 passwords
- * Passwords must be 8 - 20 characters
- * Passwords cannot have leading or trailing spaces
- * Passwords cannot be the same as the Username, User ID, or email address.
- * Passwords must contain at least one special character

Change Your Password

Current password

..... 1

New password

..... 2

Confirm password

..... 3

Cancel Save 4

1. Enter the current password (P4ssw0rd)
2. Next, enter a new password. Note: see password requirements below).
3. Enter the new password again in the 'confirm password' text box
4. Finally, click 'Save'

Password Requirements:

- Passwords must contain both upper and lower-case letters
- Passwords must contain alpha and numeric characters
- Passwords cannot be the same as the previous 24 passwords
- Passwords must be 8-20 characters
- Passwords cannot have leading or trailing spaces
- Passwords cannot be the same as the Username, User ID or email address.

Defining Security Questions

As part of the initial log in process, you are required to set up a Security Question. Be sure to note the answer, as the selected security question is to be used when resetting your own password.

Define Security Questions

From the drop down list(s) below, select question(s) that can be used later to confirm your identity should you forget your password.

Note: In the future when answering a security question you must enter the answer EXACTLY as you typed it here. Answers are case-sensitive, so if you use capital (upper-case) letters when entering the answer now, you will need to also capitalize those letters when answering the question later. Also, if entering a date as an answer, when answering the question later, you must type it exactly as you did on this screen, using the same dashes, hyphens or other characters as you enter now.

* The answer(s) must be at least 3 characters in length.

1. 1 Security Question: What school did you attend for : ▼

2 Answer:

3 Confirm Answer:

Cancel Continue 4

1. Select a Security Question
2. Type in the Answer
3. Confirm the Answer
4. Click 'Continue'

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Resetting Your Password

Welcome
Please sign in:
[I forgot my password](#)
 For password reset assistance:
 Contact VTHR at: (855) 828-6700, Option 4
 or email VTHR.helpdesk@vermont.gov

Passwords can be reset by the user with the “I forgot my password” link beside the login box.

You will be prompted for your login credential (state email address) and then a security question. Upon successful entry you will be prompted to change your password.

Forgot password?

Please enter your User Name, and an email containing your password will be sent to you. For additional assistance please contact VTHR.Helpdesk@vermont.gov and/or (802) 828-6700 - Option 4.

Login Credential:

Forgot password?

Below is one or more security question(s) you selected earlier for purposes of confirming your identity when requesting your password. Please enter the correct answer EXACTLY as you originally entered it. If you used capital(upper-case) letters before, you must use them now. If you specified a date as the answer to a question the date must be typed in the exact same format as before (using same dashes, hyphens, or other characters used when you first entered the correct answer).

What school did you attend for sixth grade?

Welcome Page Navigation

1 VERMONT DEPARTMENT OF HUMAN RESOURCES Center for Achievement in Public Service

2 Search

3 User Profile/Settings

4 ANNOUNCEMENTS

- AHS is currently in the implementation phase for their own LMS
- DPS will start their implementation in the coming months
- Other agencies who wish to implement their own LMS should contact CAPS

5 Welcome Franklin!

The State of Vermont is pleased to roll out **SOV LINC: Lead. Innovate. Navigate. Connect!** A centralized, on-line learning portal to register for trainings, plan professional development, access on-line classes and browse learning resources.

6 New Trainings Just Added!

Introduction to Myers-Briggs

7 My Inbox

View transcript
(0 approved training selection(s))
(Registered for 1 training selection(s))

8 My Upcoming Trainings

	Due Date	Action
Supervising in State Government: Level 1	None	None

Other navigation links: Browse All Classes, Supervisory Training, Vermont Certified Public Manager® Program, Consulting and Custom Trainings.

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- 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 SOV LINC 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 supervisory duties, starting with Stepping Up to Supervision through the different levels of Supervising in State Government (SSG) classes.

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- **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.

Universal Profile

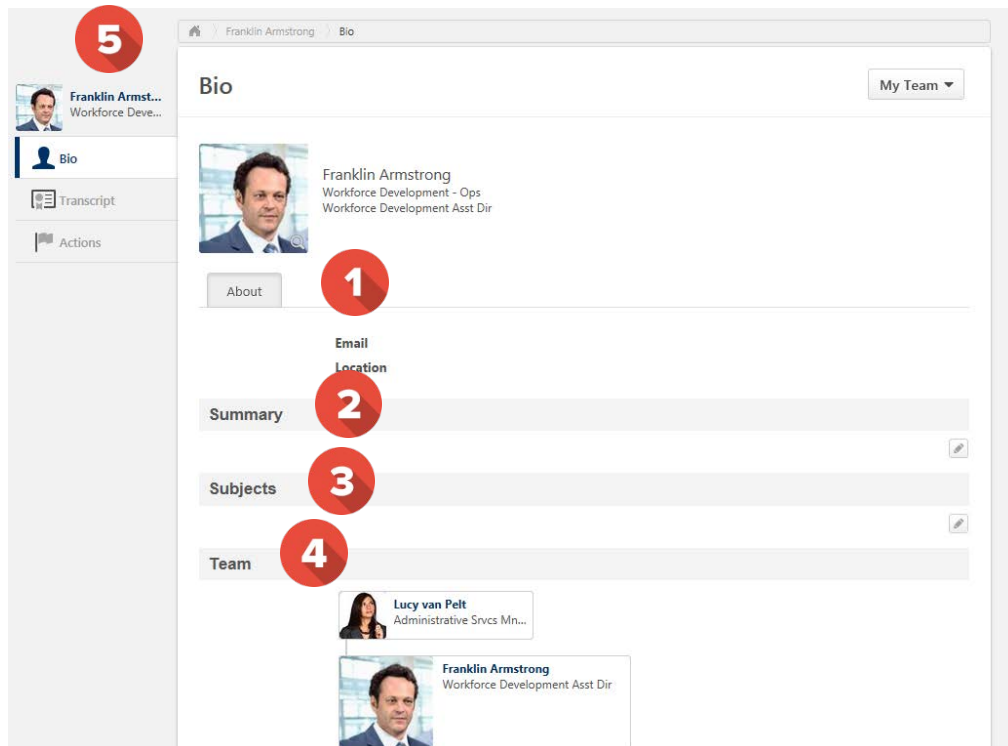
My Account

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



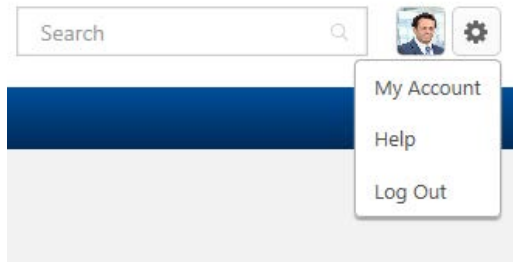
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- When users click on this image, it will bring up the “Bio” page, as seen below.

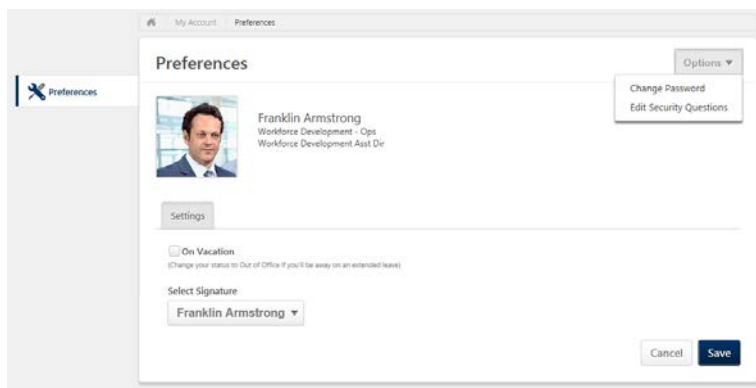


- About** – This section includes the users email and location. This information is generated by a feed from the VTHR system.
 - Summary** – Users may create a professional bio about their work history, skills and current projects in this section by clicking on the box on the right-hand side of this section.
 - Subjects** – Users may choose from a provided list, areas in which they have an interest or skill.
 - 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 [here](#).
 - “Actions Tab” allows users to select sessions, withdraw from a training or view training details.
- Click on the gear 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).

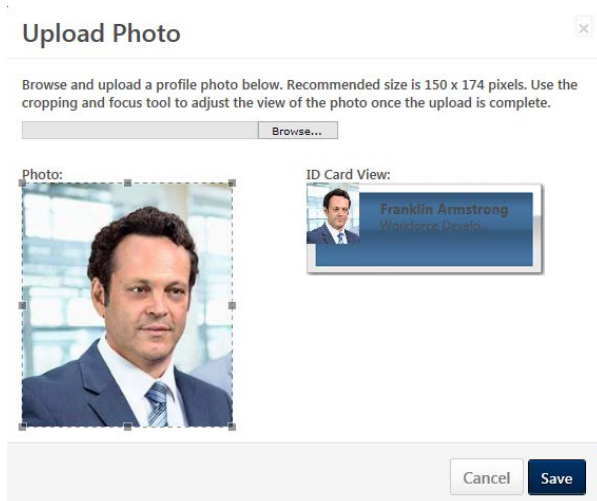
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4. Click on “My Account”. The screen below will appear. On this screen, users can change their password, edit security questions, check “on vacation” if out on extended leave, select a signature style and add/change the profile picture.



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.



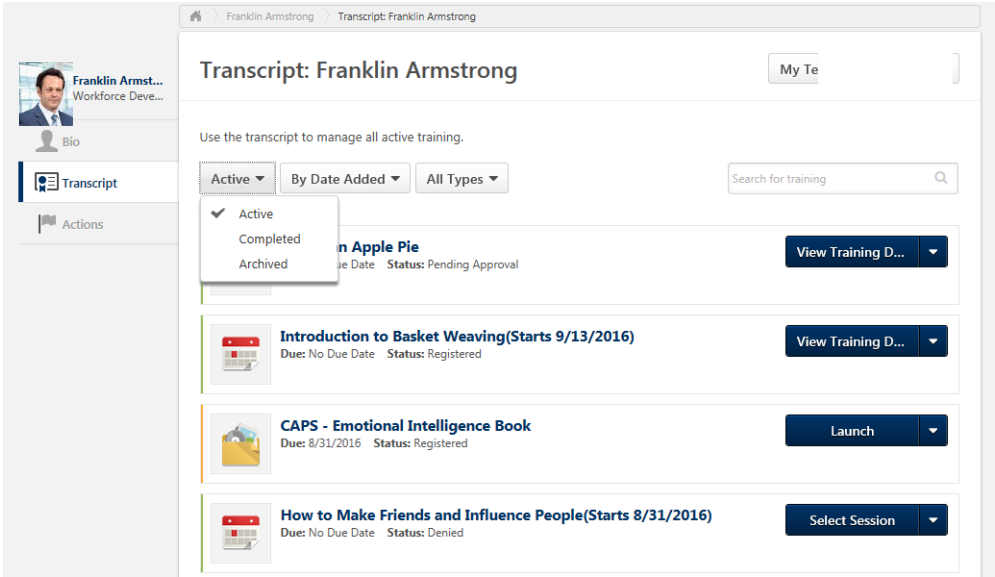
6. Click on “Browse” and choose a picture to upload. Use the photo box to move the image and click Save. The image should show up in “Universal Profile”.

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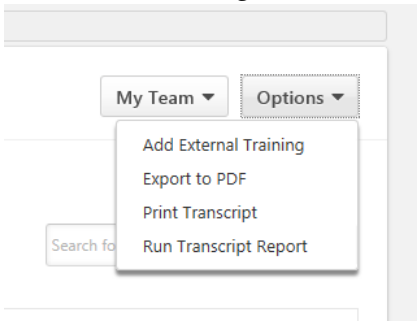
Transcript

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.



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- **Add External Training** – the system allows users to add external training to their transcript, with approval. It is recommended to only upload external training related to your current job duties within the state of Vermont. You will be prompted to enter relevant information and upload a certificate or proof-of-completion. ***Important:** The title entered must match the title on the uploaded file to be approved.*

Add External Training

Enter the information below and submit for approval. This information will be added to your transcript, and you may follow the approval process by monitoring the status of the external training.

Language
English (US)

Title *

Training Description

Institution *

Training Dates *

Start Date End Date

Credits Earned

Training Hours

Hours Minutes

0 0

Proof of Completion/Certificate *

Drag and drop files here or [Select a File](#)

Cancel Submit

- **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.

If users need a more formal transcript, please contact DHR.CAPS@vermont.gov.

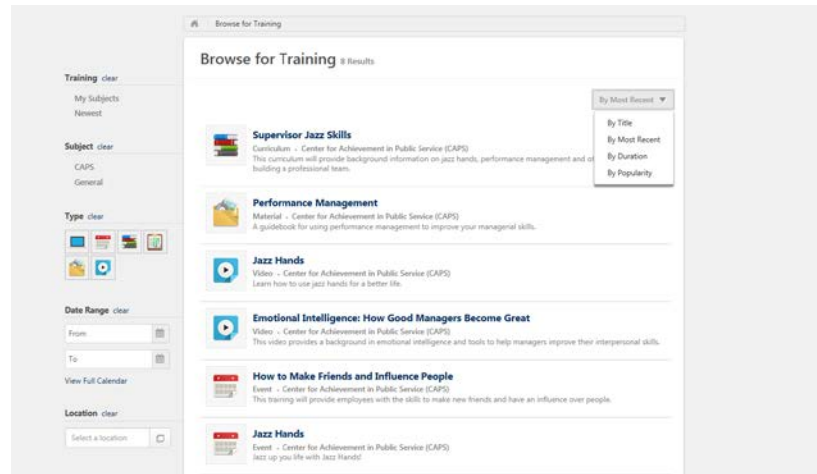
Training Overview

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 like 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),

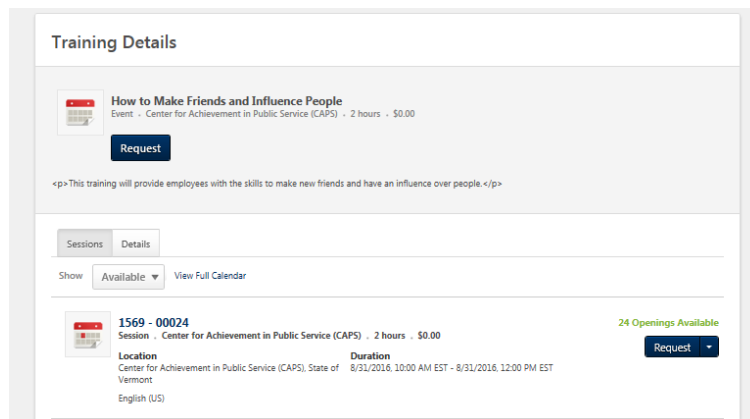
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by **Full Calendar** and/or by **Location**. The center of the screen will show users trainings that are available. When you click on the drop-down arrow in the right-hand box, you can search by **Most Recent**, **Title**, **Duration** and/or **Popularity**.



- 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. Be sure to click on the session (bottom), rather than the event (top)



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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.

Transcript: Franklin Armstrong

Options ▾

Use the transcript to manage all active training.

Active ▾ By Date Added ▾ All Types ▾ Search for training

Search Results (9)

How to Make Friends and Influence People (Starts 8/31/2016)
Due: No Due Date Status: Pending Approval **Withdraw** ▾

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 in the bottom left hand corner of the screen.

Notify me of new sessions

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 click the box at the bottom, "Notify me of when sessions are scheduled at any location."

Interest Tracking

The Basics of Motivational Interviewing

Location

Select a Location

Comments

Enter your comments here


☐ Notify me when sessions are scheduled at any location

Cancel Submit

Waitlist

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

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1249 - 045187:0002-87
 Session • Center for Achievement in Public Service (CAPS) • 3 hours • \$0.00

Location
 Center for Achievement in Public Service (CAPS), State of Vermont
 English (US)

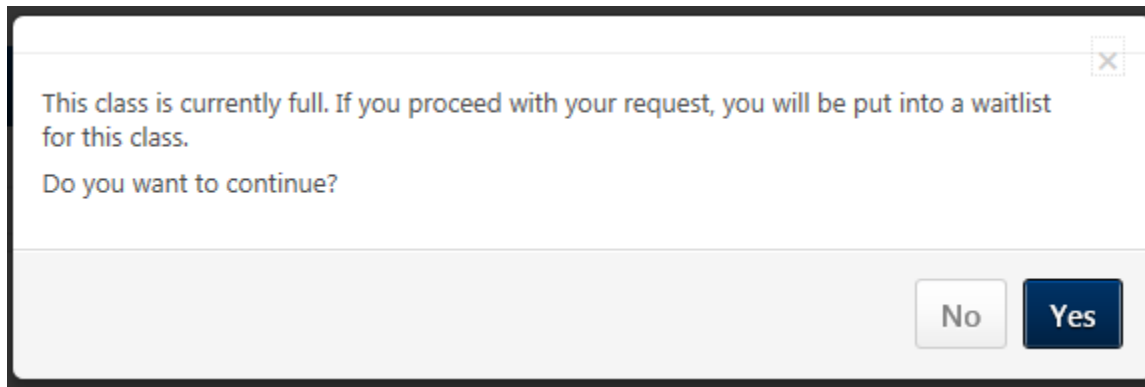
Duration
 10/5/2016, 9:00 AM EST - 10/5/2016, 12:00 PM EST

No Seats Available
 Request
 Request

Notify me of new sessions

1 Result

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

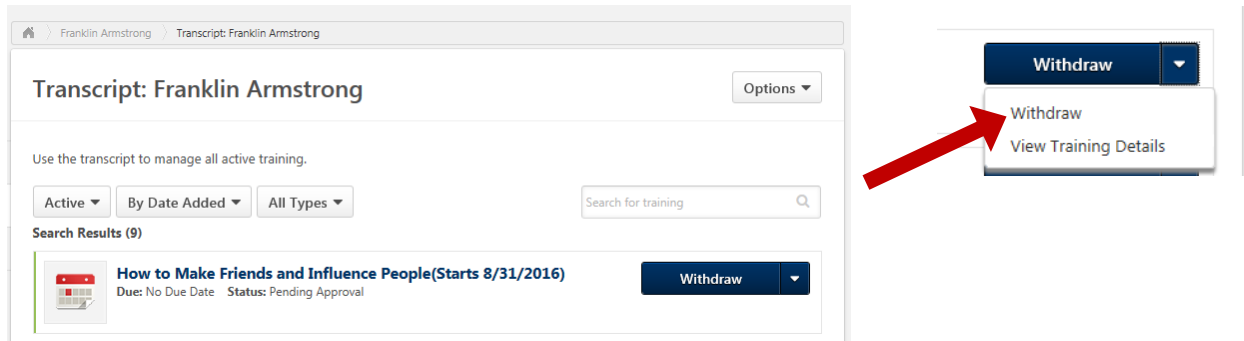
1. If a user is unable to attend a training, the user should login to the system and cancel/withdraw their registration for a class as soon as possible. Users will find a Withdraw link located in a few places. First users will see the Withdraw link or button on the Welcome Page in the “My Upcoming Training”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

My Upcoming Trainings		
	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.

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- 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.

Withdraw Registration

If you withdraw your registration for this session, you will immediately be withdrawn from the roster.

Session Details

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

SESSION WITHDRAWAL OPTIONS

Please select a reason

Comments

Submit

Cancel

Important: Canceling from your calendar invite is NOT withdrawing from a session, you need to log into the LMS and follow the withdrawal directions above.

Learner Home

Purpose

This section is to outline the process for which a learner will navigate to the Learner Home as outlined in the Learning Management System New Release January 30, 2018.

Detailed instructions to navigate to Learner Home:

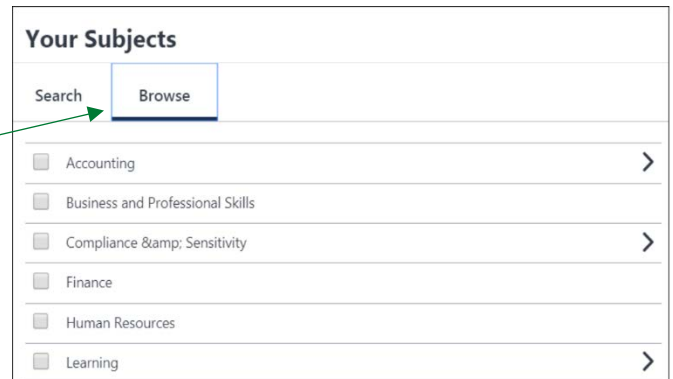
- Log into SOV LINC.
- Go to the navigation bar, hover over “Learning.”

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3. Select the Learner Home from the drop down menu. A new page will be displayed with the learner's information as listed below.

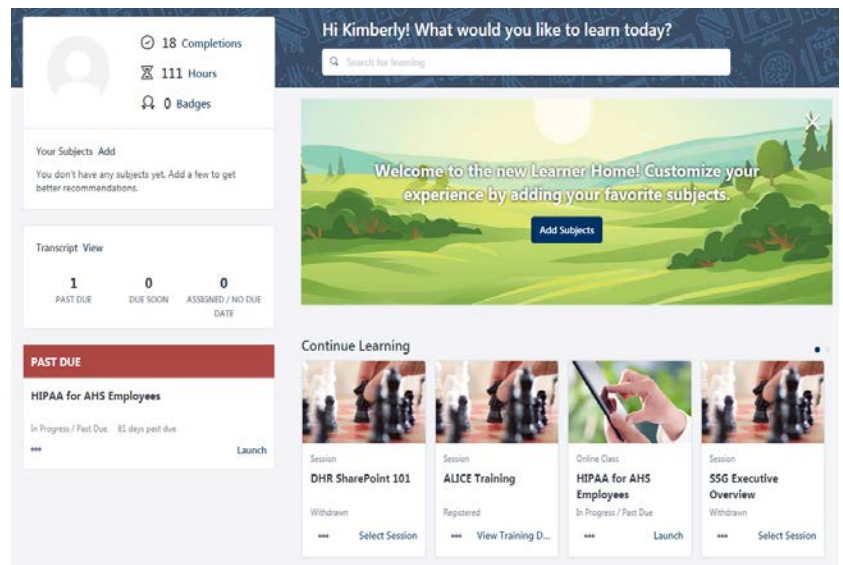
Subjects

When navigating to: **Learning > Learner Home > Your Subjects [Edit]**, there is a new "Browse" tab which allows learners to browse and select Subjects.



User Profile

The User Profile on the top left of the page allows a learner to quickly see their all-time learning completions, and hours. In one click a learner can access their **Transcript**, **Universal Profile**, and **Selected Subjects**, which help power their recommendations.



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Side Bar:

Learners do not need to leave their Learner Home page to access their Transcript: the **Side Bar** on the left side of the page contains all of their action items.

It's conveniently broken down by learning that's **Past Due**, **Due Soon**, and learning Assigned with No Due Date.

Transcript View

1	1	4
PAST DUE	DUE SOON	ASSIGNED / NO DUE DATE
PAST DUE		
HIPAA for AHS Employees		
Registered / Past Due 7 days past due		
...		
DUE SOON		
HIPAA for AHS Employees Certification		
Pending Completion Approval Due in 13 days		
...		
Manage		
ASSIGNED / NO DUE DATE		
HIPAA for AHS Employees - HTML		
In Progress		
...		
AHS - GoTo Meeting test		
Registered		
...		
AHS - GoTo Meeting test		
Registered		

Carousels

Learners have different learning carousels to browse on the page. These learnings are based off the learner's **history**, **saved learning**, **interested subjects**, and **recommendations** powered by machine learning.

Saved For Later

Materials Explore Out To Look Inward 3 Hours, 30 Minutes ★★★★☆	Curriculum Modern Office Layouts for the New Age 20 Minutes ★★★★☆	Video Your Company & The Environment 1 Hour ★★★★☆	Online Course How the Past Saw the Future Helps You Now 2 Hours, 10 Minutes ★★★★☆
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Continue Learning

Online Course TED Talk: Do schools kill creativity? In-Progress Launch	Curriculum Photoshop for Beginners In-Progress Evaluate	Video Really Understanding Competitive Intelligence... In-Progress Launch	Materials Keynote "Filling a Gap You Didn't Even Kno... Pending Prerequisite Register
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Top Picks for Jackie

Materials Stop and Smell The Flowers: Work Smart... 3 Hours, 30 Minutes ★★★★☆	Curriculum Connecting Inside & Outside Worlds 20 Minutes ★★★★☆	Video Are you safe from Accounting Tricks? 1 Hour ★★★★☆	Online Course Teams & You: How Best To Work Re... 2 Hours, 10 Minutes ★★★★☆
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Welcome to the State of Vermont's SOV LINC: Lead, Innovate, Navigate Connect for Managers

Welcome to the training and registration system for the State of Vermont, SOV LINC. This section will provide information on your access as a user, as well as functions available to you as a manager or supervisor.

Supervisory Functions

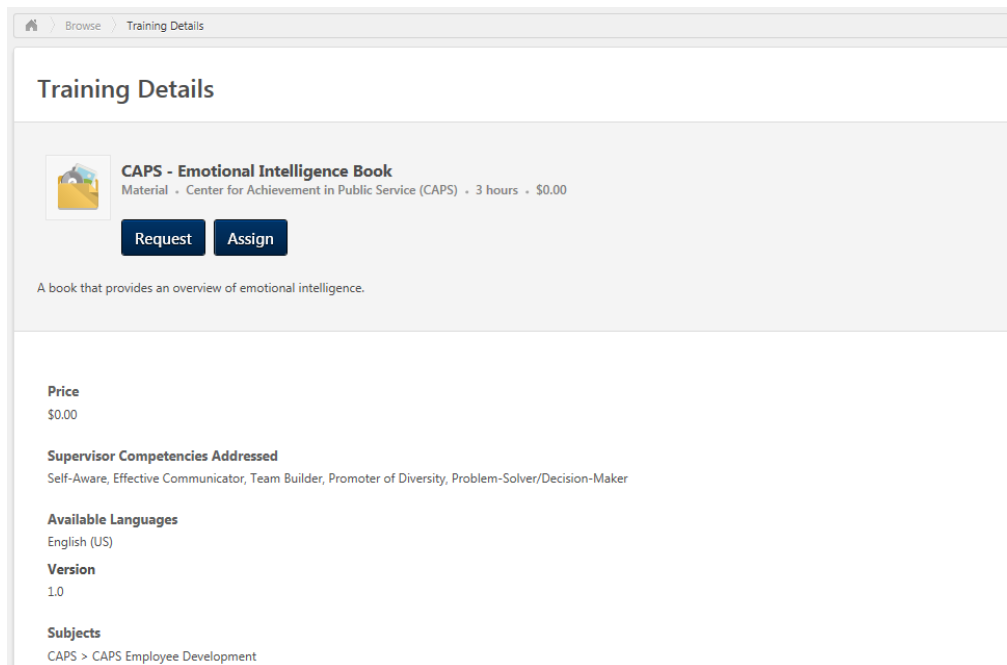
Assign Training

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:

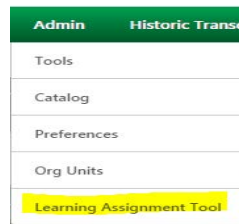
1. Hover over Learning, and click on "Browse for Training". When you find a training, material or other learning object that you would like to assign to your team, click on the title. When the training opens, you will see two buttons, one that says Request (this is for you to request the training for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

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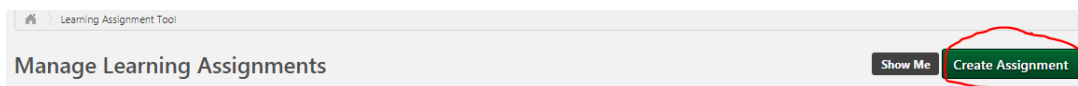


- On the screen below, you can choose who you assign the training to (including their subordinates). Where applicable, choose a due date (this field doesn't show up for all learning objects), a comment or reason, and who the training should be assigned to. You can also choose to **Automatically register 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.

- Hover over "Admin" on the menu bar, then click on "Learning Assignment Tool"



- To create a new assignment, click on the "Create Assignment" button:



- SETUP: Begin by entering an Assignment Title (in a format similar to what is listed below) – then click "Next":

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Learning Assignment Tool Create Assignment

Create Assignment

Show Me

- Setup
- Options
- Schedule
- Users
- Confirm

General Information

Assignment Title
DVHA P & S Training

Assignment Description
i.e. Annual compliance training for HR Division.

Training Selection

Select the training for this Assignment

Select Training

Selected Training

DVHA - Privacy and Security Training Curriculum
 Provider: Department of Vermont Health Access (DVHA Online) Version: 8.0 Training Hours: N/A Price: \$0.00
 This curriculum covers the importance of privacy and security in connection with the functions of Vermont Health Connect. It identifies laws, guidance, regulations, and policies related to Personally Identifiable Information (PII) and Federal Tax Information (FTI). This module also helps you understand your role in protecting and securing PII and FTI, the consequences of privacy and security violations, how privacy and security is put...

☐ Add comment to appear in the Transcript History section for each selected training.

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Next

OPTIONS: Indicate whether you are assigning the learning object as a one-time standard assignment, or as a dynamic (periodic) assignment; then determine the assignment/approval workflow; and finally, indicate if an assignment and/or registration emails should be sent to users; and finally click “Next”:

Create Assignment

Show Me

- Setup
- Options
- Schedule
- Users
- Confirm

Assignment Type

Which Assignment Type would you like to create?

☒ Standard (process one-time only)

☐ Dynamic (process continuously or periodically)

Training Assignment Workflow

How would you like the training to be assigned to users? Your selection will impact what status the training will be in on users transcripts.

☐ Assigned only

☐ Assigned and Approved

☒ Assigned, Approved, and Registered

☐ Bypass User Payment

No changes can be made to these email settings after the Assignment is submitted.

Email Settings

What email settings would you like to apply to this Assignment?

Training Specific Emails

Training Specific Emails

Send emails to users based on the email settings configured at the training level. You can review these email settings on the Confirm tab.

☐ Send Assign Training emails

☒ Send Register Training emails

Curricula with Auto-Registration

Curricula may contain training set to Auto-Register upon registration of the Curriculum. You can suppress this Auto-Registration action from sending additional emails to users.

☐ Send Register Training emails

Previous Next

SCHEDULE: Indicate any specific processing dates, if necessary; then click “Next” (**NOTE: the “Show Me” and “?” buttons are excellent Help Tools!**):

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Processing Start Date

When would you like the assignment to start processing and assign the training to users?

☒ As soon as Assignment is submitted

☐ Specific date

Training Start Date

When would you like users to be able to start the training?

☒ As soon as the training is assigned

☐ Specific date

Training Due Date

When would you like the training to be due?

☒ No due date

☐ Relative date

☐ Specific date

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Previous Next

USERS: To choose who to assign the training to, click on the “Select Users” button:

Setup

Options

Schedule

Users

Confirm

User Criteria

Select the user criteria that will define who is included in the Assignment.

Select Users

Add users by selecting organizational units, groups and/or individual users.

Select Users All Users

Then begin typing in a user name in the Search box and click on the magnifying glass until you find the correct user; then click on the box to the left of the name and click on “Select” *(NOTE: If you are assigning to more than one user at a time, continue typing in user names in the Search box, and checking off the boxes to select each user, before clicking on the “Select” button):*

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Select Users

Search Selected (1)

Users christine.brown Filters

User ID	Username	Manager
User ID	Username	Manager's First Name and/or Last Name
Position	Division	Location
Position	Division	Location

Reset Filters Apply Filters

Christine Brown
 Type: User ID: 17509 Username: christine.brown Status: Active Manager: Katie Whitney Organizational Unit(s): Secretary's Office Admin Costs (Division), Bus Application Support Spec (Position)

Christine Brown
 Type: User ID: 15244 Username: christine.brown Status: Active Manager: Dan Peterson Organizational Unit(s): Captive Insurance Division (Division), Administrative Insurance Exam (Position)

Cancel Select

Ensure that the "Enable Assign New Occurrence" is activated, then click "Next":

User Criteria

Select the user criteria that will define who is included in the Assignment.

Select Users
 Add users by selecting organizational units, groups and/or individual users

Select Users All Users

Christine Brown
 Type: User ID: 17509 Username: christine.brown Status: Active Manager: Katie Whitney ☐ Include Subordinates X

Victoria Jarvis
 Type: User ID: 30823 Username: victoria.jarvis Status: Active Manager: N/A ☐ Include Subordinates X

Jason King
 Type: User ID: 31295 Username: jason.king Status: Active Manager: Athanasia Bostalo ☐ Include Subordinates X

Upload Users
 Add users by uploading files with their Username, User ID or Email Address in the .csv format. Each file can have a maximum of 2000 users.
 Select File Upload File

Assign New Occurrence
 Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained. This setting only applies to users on the Initial User List.
☒ Enable Assign New Occurrence
☐ Only assign new occurrence to users in the 'Completed' status

Generate Initial User List

Previous Next

CONFIRM: Before submitting the assignment to users, confirm the assignment parameters; then click "Submit":

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Create Assignment Show Me

DHVA P & S Training

Setup 1 Training

Options ?
Type: Standard Training Assignment Workflow: Assigned, Approved, and Registered Emails: Training Specific Emails

Schedule
Processing Start Date: As soon as Assignment is submitted Due Date: No due date

Users 3 Users
Assign New Occurrence: On

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Previous Submit

To push the assignment, click on “YES”.

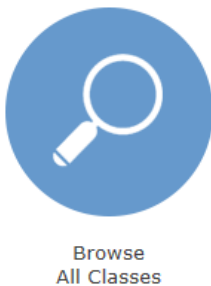
Submit Assignment

You are about to submit a Standard Assignment for 3 users. Are you sure you want to continue?

NO YES

****All assignments take between 5-30 minutes to populate in a user's My Training or Transcript sections.

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



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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”.

Welcome Lucy!

You have entered a realm...a realm of possibility and knowledge. A realm where possibilities are endless and opportunities abound. May the force be with you...

ANNOUNCEMENTS

- Implementation for AHS is coming!
- New SSG classes for 2017 to be announced.
- Like what you see? Want your own Division LMS? Contact CAPS for more information.

Browse Elective Classes **Supervisory Training** **Vermont Certified Public Manager® Program** **Consulting and Custom Trainings**

New Trainings Just Added!

- American Apple Pie
- Bob Ross Mighty Mountain Lake
- CAPS - How to Make Irish Soda Bread

My Inbox

- [View transcript](#)
(2 approved training selection(s))
(Registered for 2 training selection(s))
- [Approve training](#)
(Your employees have 1 training request(s) pending approval)

My Upcoming Trainings

	Due Date	Action
Intro To Comic Relief	None	None
Intro To Comic Relief	None	None
Intro To Comic Relief	None	None
Intro To Comic Relief	None	None
Intro To Comic Relief	None	None
Intro To Comic Relief	None	None

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.

View Pending Requests

View: extending training requests you must approve, deny, 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:

Approve

Training Pending Approval

Printable Version Export to Excel

Name: [Search]

Requested By: Armstrong, Frankie
Workforce Development - Ops (Division)
Workforce Development Asst (or position)
Lucy van Pelt (manager)

Training	Type	Date	Purpose	Options
How to Make Friends and Influence People (Week 8/31/2018)	Initial	8/23/2018 3:38 PM		✓ ✗

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- 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 %

- 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

Please enter any additional comments:

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.

Manage Employee Learning

View the Learning Information for employees.

[Manage Pending Requests](#) (Displays a list of pending requests for which you are the approver)

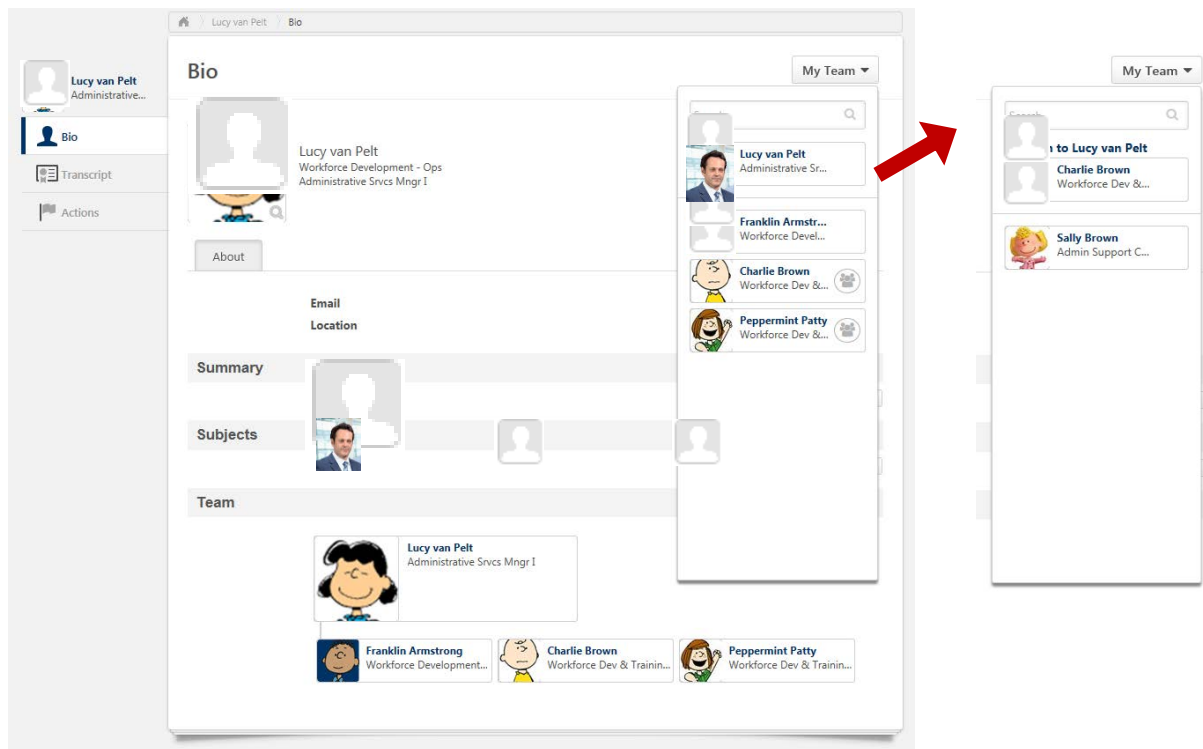
Manage Subordinates	
SUBORDINATES	
NAME	VIEW TRANSCRIPT
<input type="checkbox"/> Franklin Armstrong	
<input type="checkbox"/> Charlie Brown	
<input type="checkbox"/> Peppermint Patty	

4. Please see the section on "[Reports](#)" for another place to approve trainings requests.

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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.



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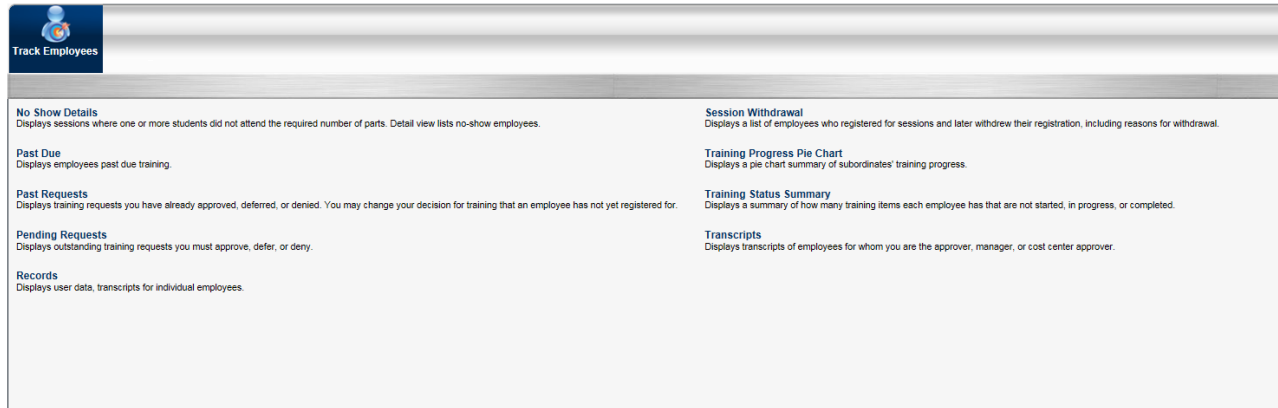
Reports

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.



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 gear 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
6/1/2007 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						
Providers:	All						
Report Generated By:	Hagan, Kim						

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

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	Comastene 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.

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NAME	TYPE	TRAINING	ACTION	DATE	DETAILS
Armstrong	Material	CAPS - Emotional Intelligence Book	Registered	6/23/2016	Details
Armstrong	Session	How to Make Friends and Influence People	Denied	6/23/2016	Details
Brown	Material	CAPS - Emotional Intelligence Book	Registered	6/23/2016	Details
Brown	Event	How to Make Friends and Influence People	Approved	6/23/2016	Details
Petty	Material	CAPS - Emotional Intelligence Book	Registered	6/23/2016	Details
Petty	Session	How to Make Friends and Influence People	Registered	6/23/2016	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

[Printable Version](#)
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Name

Search

(2 Results)

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		✓ ✗

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

Records


Displays user data, transcripts for individual employees.

Employee Records



Choose User :  

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

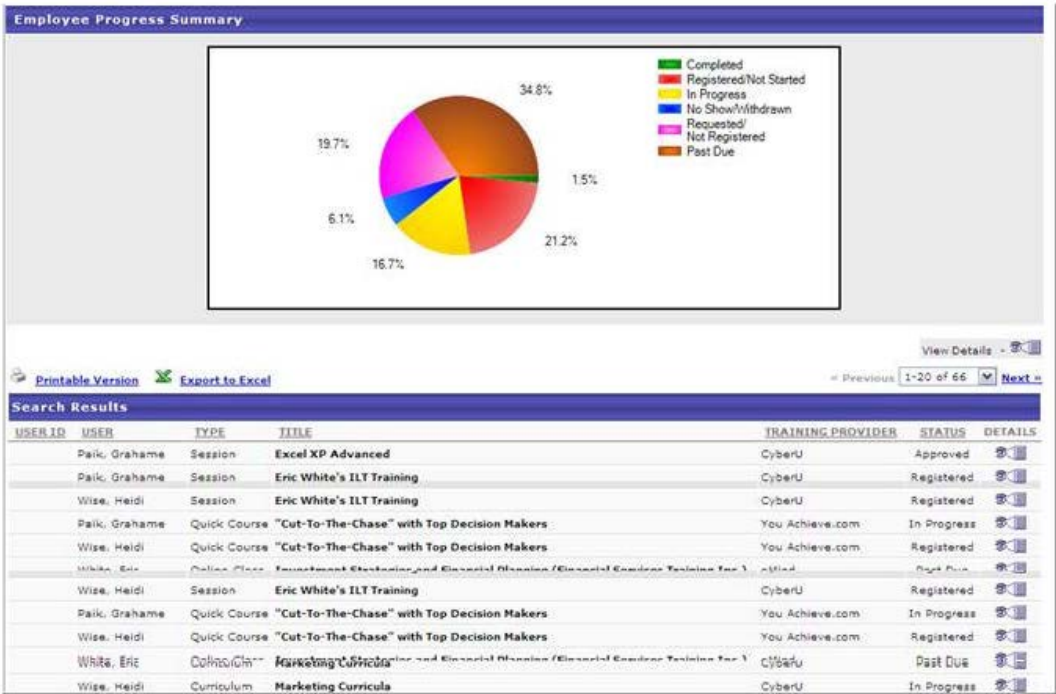
TITLE	TYPE	PROVIDER	REQUEST DATE	DUE DATE	STATUS	ASSIGNOR
Welcome to the Leadership Development Curriculum	Note	Internal	9/5/2013		Not Started	
Leadership Development Curriculum	Curriculum	Internal	9/5/2013		In Progress	Lolley, Jon
Basics of Effective Selling (Second Edition) (Includes Simulation)	Online 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

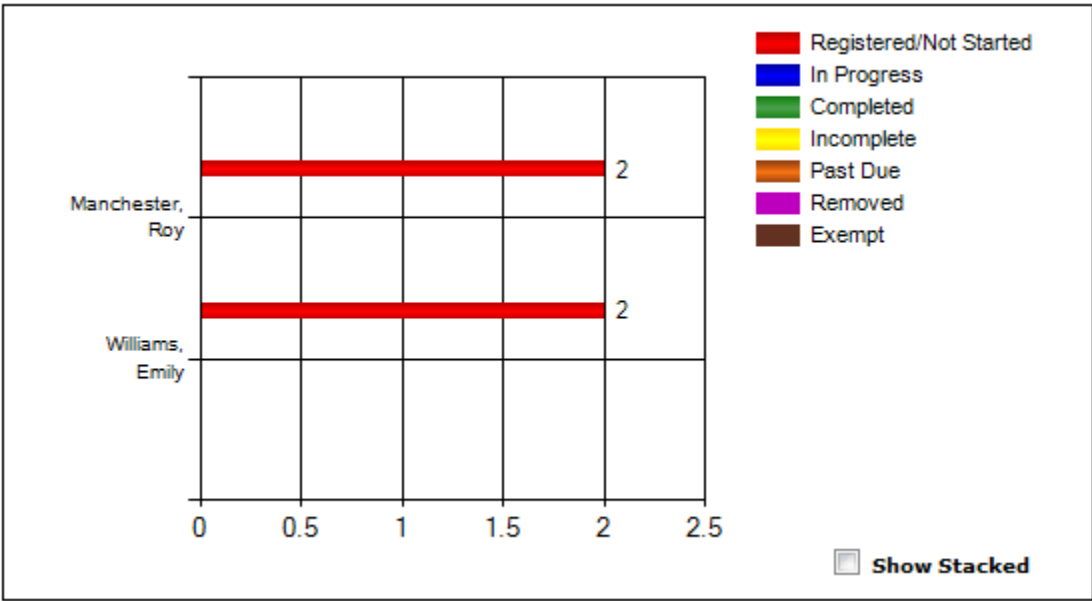
Session Withdrawal Report											
EMPLOYEE	IDENTIFIER	COST CENTER ID	EVENT NAME	SESSION LOCATOR	SESSION NUMBER	SESSION START DATE	COST OF TRAINING	WITHDRAWAL DATE	WITHDRAWAL PENALTY	TOTAL COST	REASON
Cavanaugh, Peter	Marketing (Division) Associate (Position)	CC-1	New Hire Orientation	10003		3/28/2003 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									

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- **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.



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- **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, Tips and Tricks

Use the checklist to help troubleshoot a technical or functional issue:

Ask yourself the following questions as you assess the technical or functional issue at hand.

Description: What is the issue? Technical or Functional? A Technical Issue may be about how the LMS is built and the pieces that make up the software. A Functional Issue should describe how the LMS interacts with a user.

What role am I troubleshooting?

- Manager
- User
- Not sure.... Go to the help section located in the LMS (located in the upper right-hand corner under the gear in the drop-down menu beside your picture) and click in the Search box. Type the keyword in the Search box and find the topic.

Resources Available: Agency/Department specific business processes

Help Link at the top of the page: https://help.csod.com/help/csod_0/OnlineHelp.htm

Actual Behavior: What are you currently experiencing? i.e. Do you have any roadblocks? If so what are they?

Expected Behavior: How did this part of the system work in the past to meet your need?

Business Impact: How is the issue impairing your use of Cornerstone? Are other employees having the same issue within their Agency? This is an opportunity to explain the severity of the issue.

Replication Steps: This piece is critical in troubleshooting! Please provide:

- Chronologically numbered steps
- Supplemental screenshots or data if/when applicable

**Please note these should not replace written steps within the case itself.

**It is critical that the visual demonstration is clearly described in your own words as well

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Common Issues:

- **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.
- **Browser** – Common issues occur with Internet explorer, if possible try utilizing Google Chrome or Firefox when using the LMS
- **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.
 1. Questions and/or issues:
 - For AHS employees, AHS.LMSAdmin@vermont.gov
 - For DPS employees, DPS.EMHSTraining@vermont.gov
 - For AOT employees, AOT.VTTCRegistration@vermont.gov
 - For other concerns, DHR.CAPS@vermont.gov