



## Manager Dashboard: Training Completion Status

## Need-to-know

- The manager dashboard area will allow managers to monitor the completion progress of required courses
- Managers have the ability to view the status by the user (direct report) or by activity (course)

## How to monitor completion progress for direct reports

- 1. Click on the my team icon on the top left and select "Manager Dashboard"
- 2. A high level overview will allow you to see the progress of each of the direct report(s) on your team

	TRACE VANNANTY SELF Y MY TEAM Y ADMINI	Tasks 🧳			
f Home	Tasks ^	<ul> <li>Pending Approvals</li> <li>Pending Signatures</li> </ul>	* EXCEPTION REPORTS		
Library	• Pending Approvals	Pending Activity Completion	LEARNING ACTIVITIES	CONTINUING EDUCATION	
	Quick Links		216	None	
Transcript	For more information, refer to	Past Due Training	79%	<b>47%</b> 53%	
Advanced Reporting	Getting Started with Manager m	Jennifer L Wicks (1)			
			Direct Reports	DirectReports + Others Direct Reports	
Manager Dashboard	Past Due Training ^		USERS (4) ACTIVITIES	Not Completed Completed	
	No past due training information available		🗸 🖶 Print 🛛 💥 Export	Display Le.	

- 3. By default, you will be able to see the direct reports listed individually. You can also toggle the view by clicking on activities to see the completion progress by your direct reports per activity
- 4. With the **Users tab enabled**, **click on the "Incomplete" button** next to the user's name. This will work even if the direct report does not have any incomplete activities



5. SumTotal will navigate the manager to the Detailed Exception Report by User

DETAILED EXCEPTION REPORT BY USER       Christopher Robin Fondacaro       Overall progress         List of activities assigned to this user.       100%											
Search Q					Current Assignments	rocessed: Wednesday, Ja	10ary 29, 2020 1	0.06:53 PM PS1			
Show all assignments (5) Filter by:	+ Add							🖨 Print 🕑 Export			
<ul> <li>Assignment Status</li> </ul>	Activity Name\$	Code 🗢	Assignment Type 🗢	Assignment Status	Assignment Date 🗢	Due date\$	Progress	Notes			
<ul> <li>Assignment Type</li> </ul>											
<ul> <li>Assignment By</li> </ul>								CLOSE			

- 6. On the left-hand side you can **filter by Assignment Status** and Type (e.g. all **completed/incomplete activities**) or show all assignments
- 7. If your direct report has **multiple incomplete assignments**, you can **export or print a list** of past-due assignments by clicking on the **print or export icons** in the top right corner. You can email or print this list for your direct reports.
- 8. Click Close when finished or navigate back to the Manager Dashboard via the My Team icon.