California State University SAN MARCOS

CSU Learn Guidebook

Overview

This guide outlines various functions available through CSU Learn, including navigation, training assignments, learning opportunities, and profile navigation.

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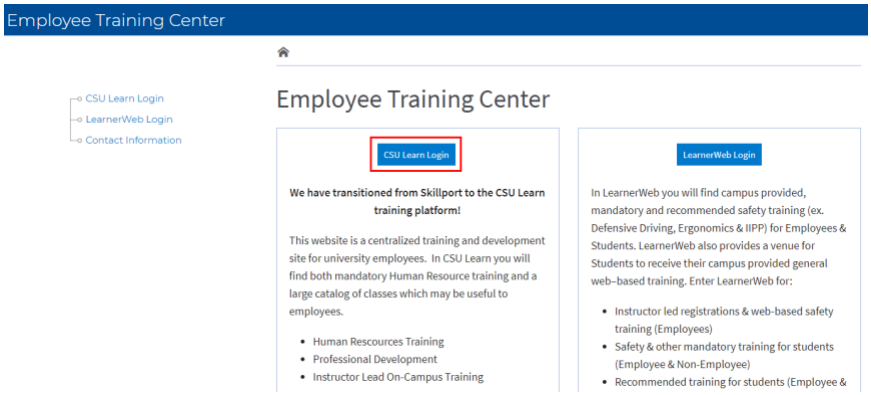
How to Login

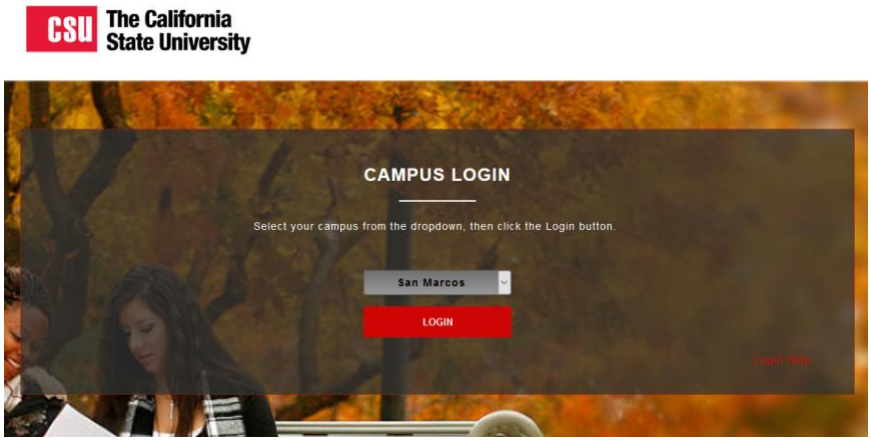
To login to CSU Learn, please visit the Employee Training Center at:

- www.csusm.edu/etc

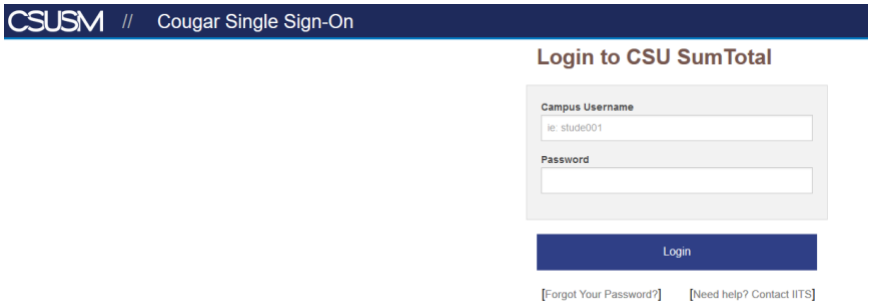
Alternatively, search CSUSM's website for "Employee Training Center" and find the appropriate link.



Select your campus (San Marcos).



Enter your campus credentials and select the blue Login button.

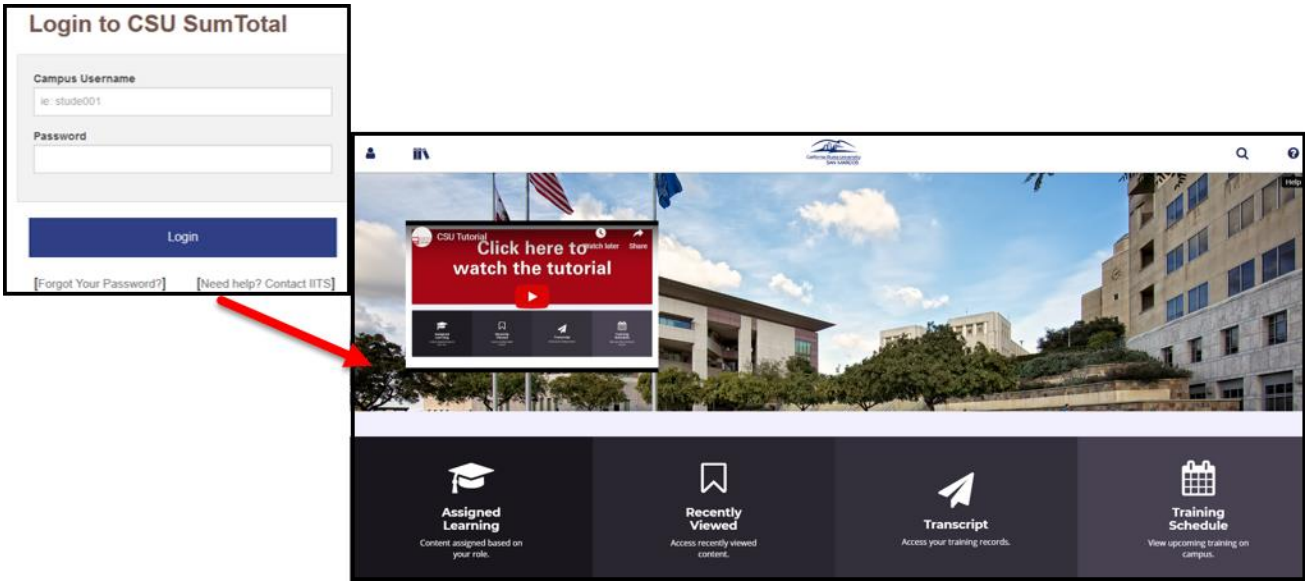


*Other login portals can be found on the Human Resources website at:

Training and Development, Development & Wellness Resources, Work/Life Balance/Future Planning, and Compliance Training web pages.

Understand the Interface and My Dashboard

You have successfully logged in to CSU Learn, but are not sure where to begin. We have provided a quick overview of the basics of the interface and your dashboards below.



As soon as you login, the page that appears is your **Dashboard**, which includes a tutorial video that can help you get started in CSU Learn.

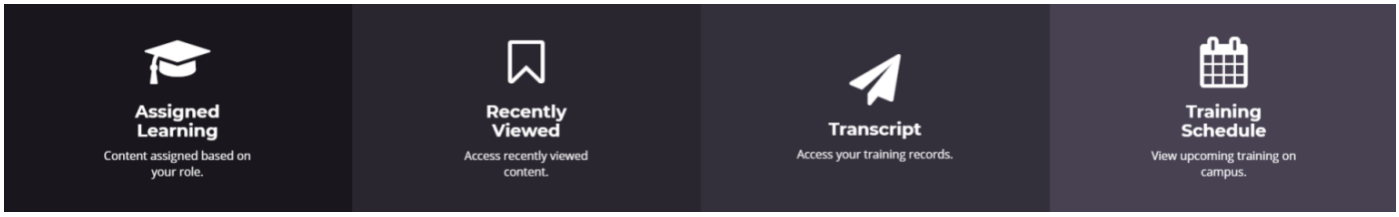
Through the **Dashboard**, you can:

- **Complete assigned learning activities:** Your dashboard includes a link to your **Assigned Learning** web page, which displays any training that you need to complete.

At the top of the web page, you will find the **header menu**. You can use this menu to find your way around the application, using the following buttons.

- The **Self Menu** ( ) includes links to pages and functions related to yourself, including other Dashboards, your Profile, learning plans and history, and more.
- The **Team Menu** ( ) includes links to pages and functions related to direct reports and other team members, including an organization chart, reporting tools, and other team-related functions.
- The **Library** ( ) allows you to search and browse the learning content library. See **Find or Explore Learning Opportunities** for further details.
- Clicking the **CSUSM Logo** ( ) in the center of the menu returns you to your Home Dashboard.
- **Enterprise Search** ( ) allows you to find just about anything in your system — from learning content, to other users, to pages in the application.
- **Help** ( ) provides access to complete, searchable, context-sensitive online help.

At the bottom of the web page, you will find a bar, which provides easy access to some of the most popular features in CSU Learn.



The Assigned Training tab ( ) displays any training, courses, or workshops that have been assigned to you. This tab will also display any training courses that are currently in progress or incomplete.

The Recently Viewed tab ( ) displays any courses that you have marked as a favorite ( ) in order to easily save and access courses later.

The Transcript tab ( ) displays your completion history and allows you to view and print your certificates of completion for all of your previous courses.

The Training Schedule ( ) tab displays any upcoming on-campus workshops or scheduled events that can be registered for through CSU Learn.

Find or Explore Learning Opportunities

As a learner, you may not be limited to just those learning opportunities assigned to you. CSU Learn includes tools to allow you to search through and explore learning opportunities to help set you up for current and future success.

If you are looking for information on completing an activity already assigned to you, see **Complete an Assigned Task/Training**.

Search for Learning

Enterprise Search allows you to find just about anything in the system. This includes learning opportunities. If you know the name of the activity or if you want to search activities by keyword, try finding the activity in **Enterprise Search**.

1. Click in the Header menu to open Enterprise Search.

2. Enter your search term in the search bar.

    - You can enter the title of the activity or the class code to locate any course or topic.
    - You can use the asterisk (*) wildcard to search for partial words (for example, entering **financ*** will return results for "finance" and "financial"). Press **Enter** to perform the search.

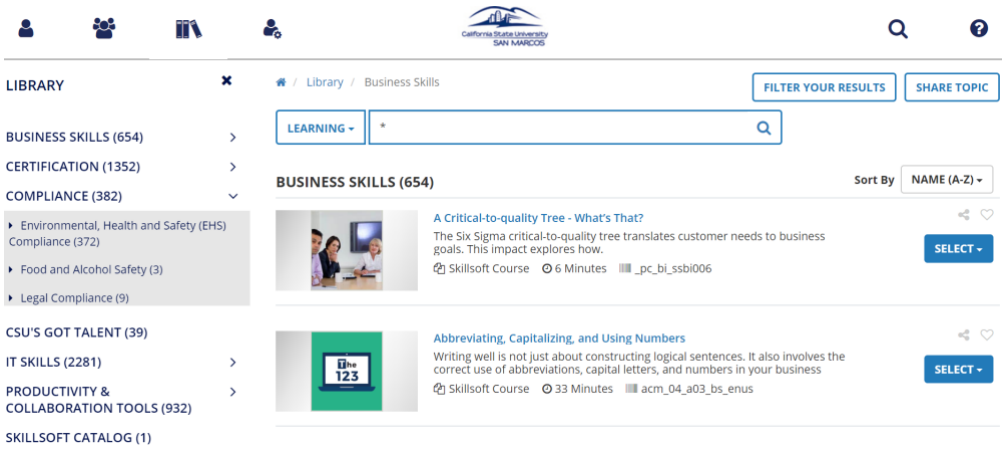
3. The search returns any learning activities that closely match your search terms, with the total number of results displayed.

Once you have found an activity you are interested in, use the blue button on the right-hand side of the row to view more details on the activity, begin the activity, register for it, and more.

If you do not see what you are looking for in the first set of results, you can click **View All** to list all results in a new page. From here, you can also sort activities by various criteria (such as relevance or date), or filter by criteria (such as activity type, delivery method, or duration).

Browse for Activities in the Library

The Library is a collection of learning activities organized by topics and subtopics. You can access the Library by clicking in the Header menu.



From here, you can:

- Use the **Navigation** (left-hand) pane to browse by topic. Use the arrows to expand or minimize lists of subtopics.
- Type your keywords into the **Search** box.
- Click **Filter** to select options to help narrow your results (such as by Activity Type).
    - Clicking on any of the options in the **Navigation** pane (whether topics or filters) causes them to display in the main **Results** (right-hand) pane. Use the **Select** split-button to perform available actions, such as registering for the activity or viewing its details page.

Complete an Assigned Task/Training

Access your training via email

Typically, the system lets you know you have a training assigned by sending you an email. This email may come when the training is assigned to you, when the due date is approaching, and when the due date has passed. These notifications may include a direct link to the training you need to complete. If this is the case, click the link provided in the email:

CSU The California State University

Dear CSU Employee,

The following learning activity has been assigned to you:

Activity name: Required Curriculum
Due Date: 01/01/2099

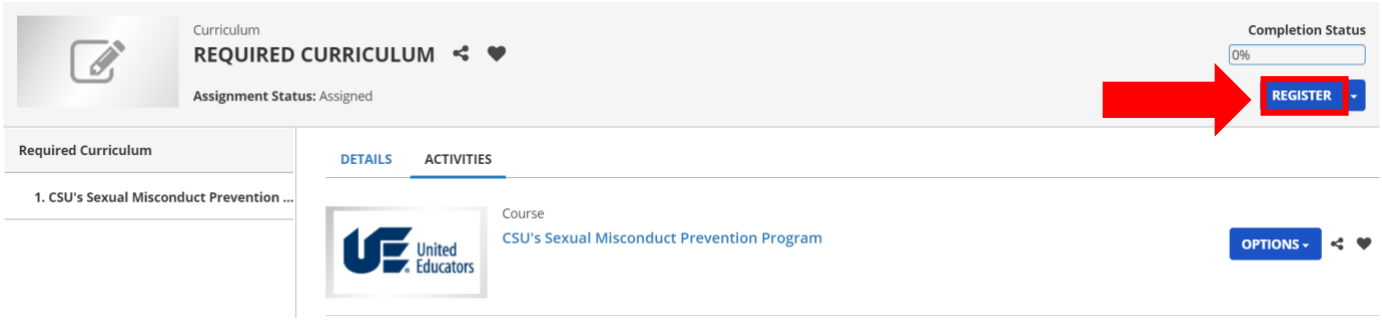
The activity has the following notes:

Click this link to view more information about this activity or assignment: https://CSU.sumtotal.host/core/pillarRedirect?relyingParty=LM&lang=en-us&domain=49&url=app/management/LMS_ActDetails.aspx%3FActivityId%3D6492%26UserMode%3D0

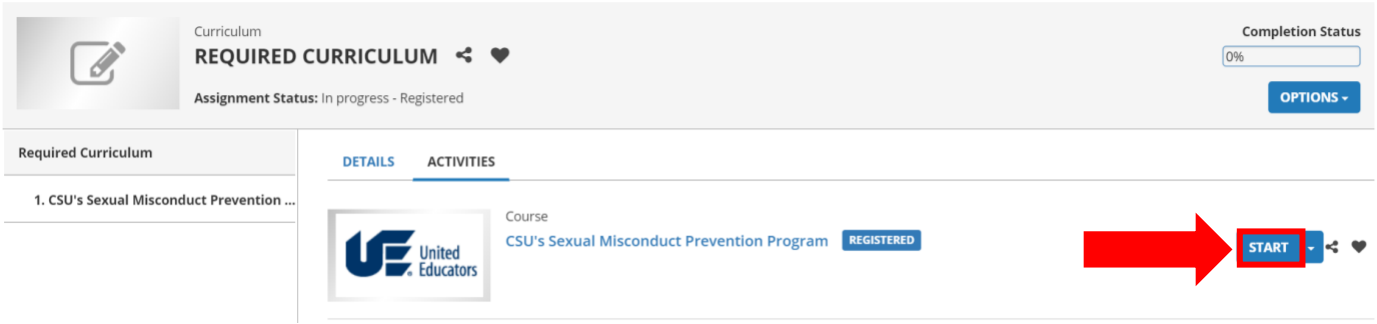
Please contact your campus admin if you have questions about this email.

Please do not reply to this message as incoming emails cannot be accepted or monitored.

Once you have logged in, the course should open automatically. Once it populates, select the blue "**REGISTER**" button.

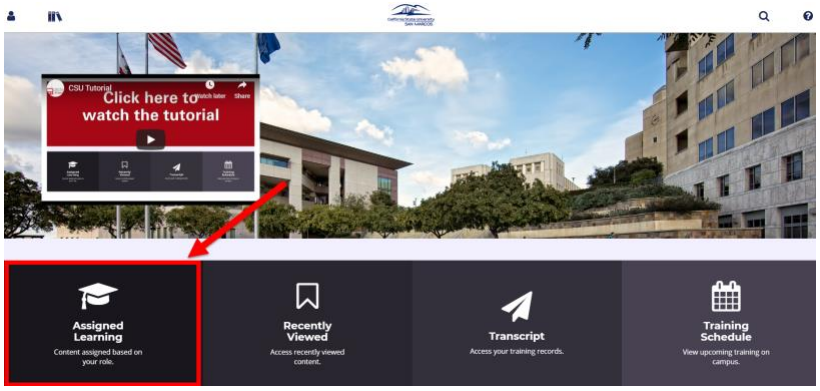


Then, select the blue "**START**" button.



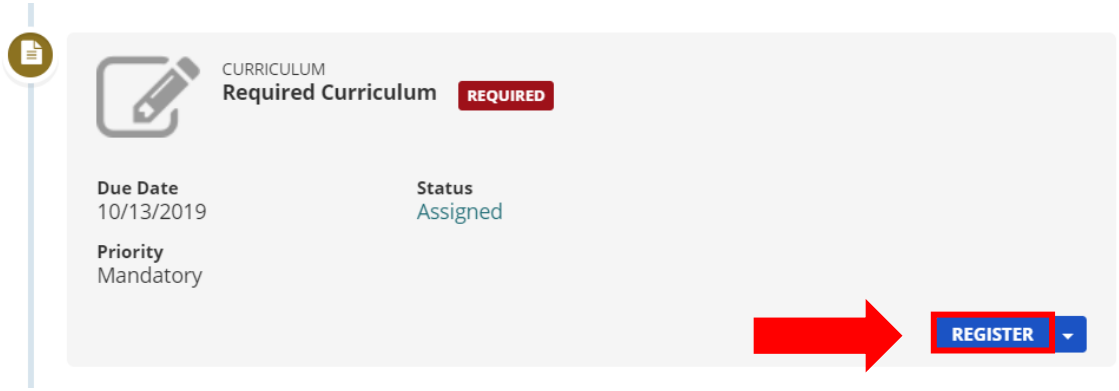
Access your assigned training through the Assigned Learning page

You can also access any training that have been assigned to you, and view any courses you have signed up for, through the **Assigned Learning** page.

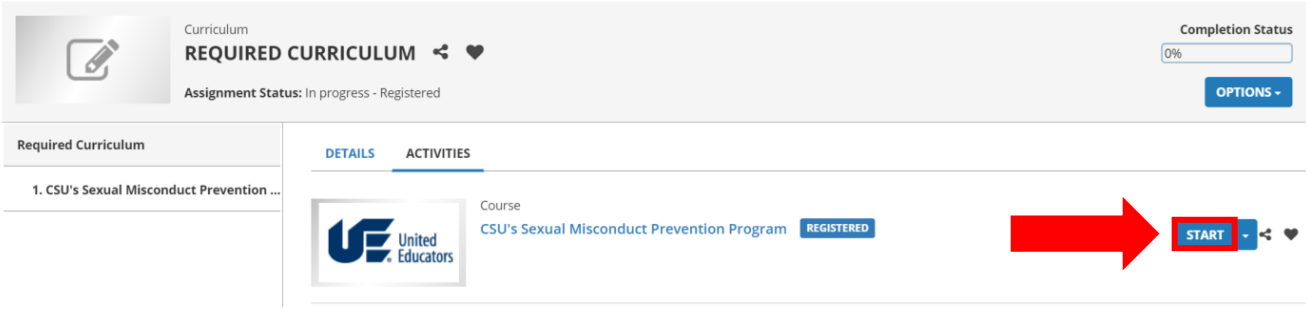


When your assigned learning page opens, it may display every training, or it may be filtered/sorted. If you do not see the training in the list, you can select from the options on the left-hand side of the screen to view the different training course(s) or workshop(s) that have been assigned to you.

Once you locate the desired training, click the blue "**REGISTER**" button.



Then, select the blue "**START**" button.



Successfully completing a training

Once you have completed your training, your completion automatically registers in the system. The condition for completion can vary, depending on the type of task.

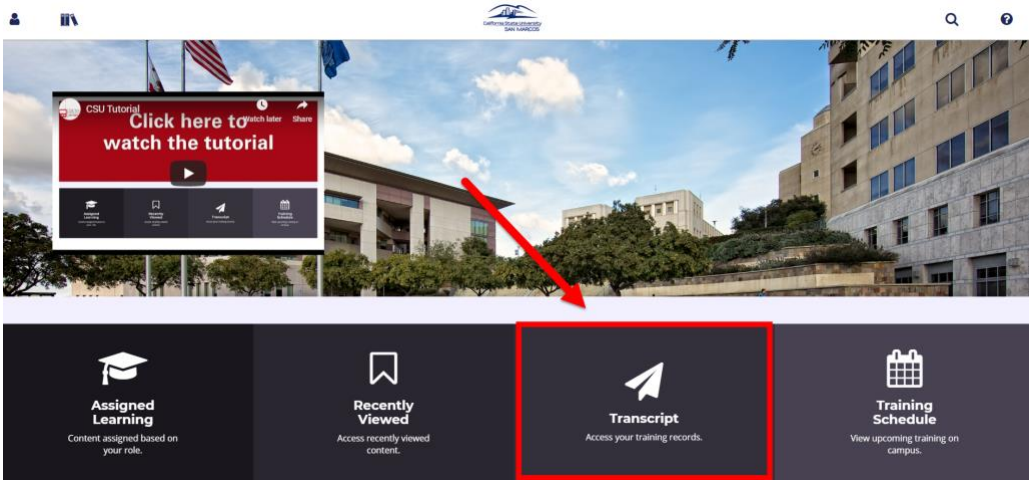
Is your completion not registering? See **Get Help for Common Issues**.

Transcripts and Certificates of Completion

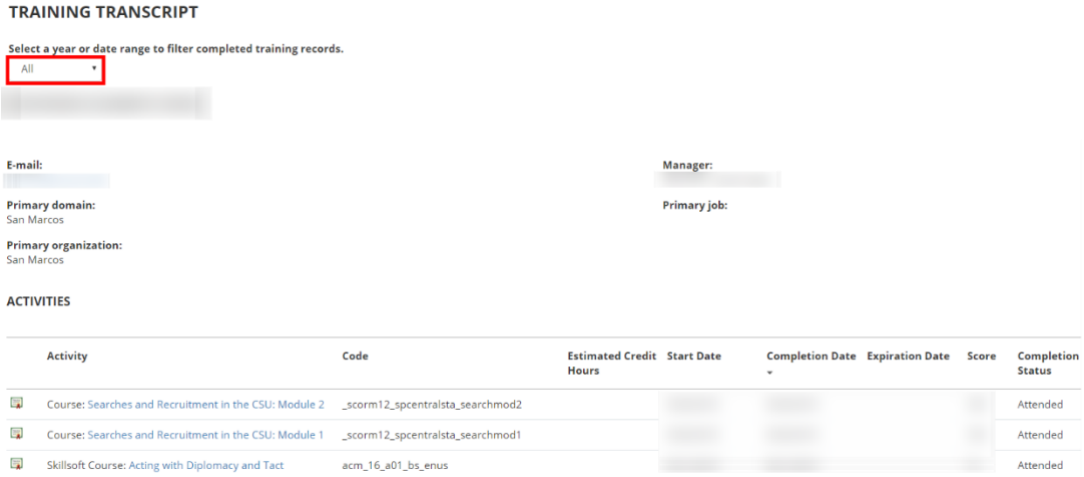
The Training Transcript contains a list of all your completed training, including waived activities. The report displays:

- Your user properties
- Activity completions
- Self-reported training completions

1. From your **Dashboard**, select **Transcript**.



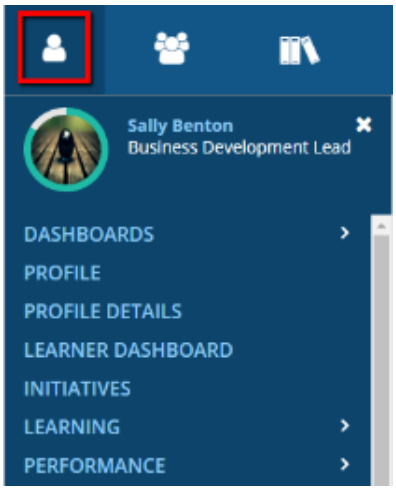
2. From this page, you will be able to view any training that you have completed within a certain date range. This feature may be changed to “All” so that you can view all training that you have completed with CSUSM.



From here, you can also:

- Click an activity's name to view its **details page**.
- Click the **certificate icon** to print your certificate of completion.
  - Do **not** select “Export to PDF”, which results in formatting errors.
  - Instead, select “**Print**”, set the layout to “**Landscape**”, and **“Save as a PDF”**.

See Information about Yourself

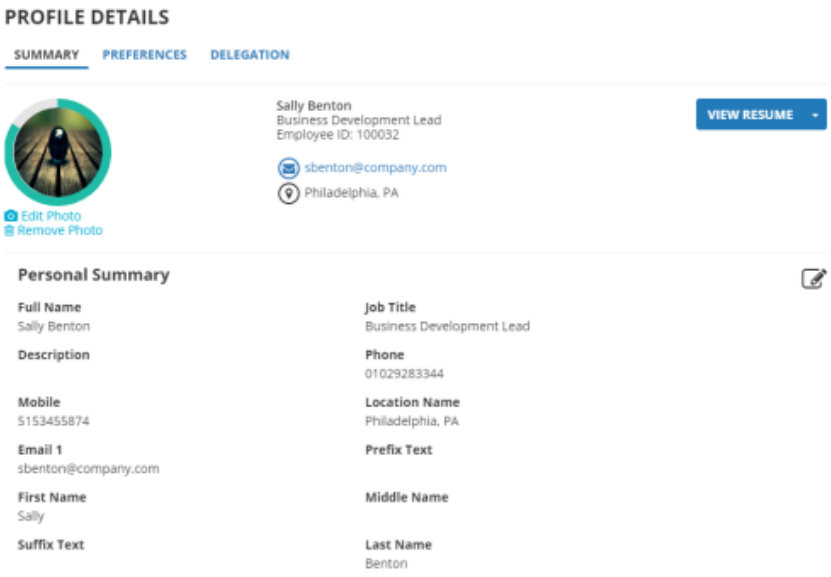


The Self-menu ( ), found in the Header menu, provides many links from which you can see and manage information about yourself.

See your basic details and manage your preferences

If you want to review your basic information or change your system preferences, visit Profile Details:

1. In the **Header** menu, click .
2. Click **Profile Details**.



The Profile Details page stores your name, profile photo, system ID, direct manager, and more.

If you want to change your system preferences (such as your system language, how numbers display, and so on), select the **Preferences** tab.

Get Help for Common Issues (Troubleshooting)

- **I tried logging in to CSU Learn, but I received an error message on my web page (such as Status 404 – Not Found).**
    - Please try clearing your cache and cookies.
    - Alternatively:
        - Switch to a different browser.
        - Use incognito mode in your preferred web browser.

- **I completed a course but it's not marking as "complete" OR I clicked the Start button but the activity isn't launching.**
    - These both commonly occur due to browser issues.
    - Clear your browser cache, and then log back in to CSU Learn before attempting to troubleshoot. Alternatively, try using incognito mode in your preferred browser.
    - For courses that are not showing as "complete," please **allow at least 30-60 minutes** for the system to update completion data. If it's still displaying as incomplete, then try the following options:
        - When launching the training, ensure that you selected the “restart” option. Restarting a training will successfully register your renewed completion in the system.
            - If you selected the “review” button, the system will not register any renewed completion data for your training.
        - Make sure you have **pop-ups enabled** for your CSU Learn website.
        - Ensure that **all sections** of the training have been marked as “**Complete**” within the training window.
        - **Click on all links** provided within the training prior to closing the window.
        - It may also be an issue with the activity itself. Contact HR and let them know about the problem for further assistance.

- **I have to exit a course before completing it. How do I pick up where I left off?**
    - This depends on the activity type.
    - Some training features a “resume” feature once the training has started again after it has been closed. These training courses typically also have a “restart” option, if desired.
    - Some training has a Bookmarking feature in the menu bar that you can use to mark your place. When you reopen the training, it should automatically pick up where you left off.
    - Some training has a navigation panel that you can use to jump forward or back as needed. Note the name of the last section you completed and, when you reopen the training, click on the desired section.
    - For some training, your only option is to click forward through the pages or videos. Again, note the name of the last section you completed to make this process easier.
        - If the activity contains quizzes, most training saves your responses, but some do not. You may need to re-take them.

- **I followed the instructions in the online help, but I still can't find or access a particular page or perform a certain task.**
    - Most pages and tasks are controlled by security permissions set by your administrator. If you are unable to do something, it is probably because you do not have the proper permissions.

- **I received an email asking me to complete a training that I have completed in the past. Do I need to take this training again?**
    - Yes, some training must be renewed regularly. To renew a training, select register and then hit the start button. If the option is available, select **restart.**

- **Who is my system or learning administrator, and how do I contact them?**

  Human Resources
  hr@csusm.edu
  760-750-4418

Frequently Asked Questions (FAQ's)

- **What is CSU Learn?**
    - CSU Learn is a learning management system (LMS) provided by SkillSoft/SumTotal. The LMS allows the CSU to assign, track, and leverage content ranging from mandatory professional development to compliance.
- **Why CSU Learn?**
    - The CSU's current enterprise training contract was reaching the end of its term. As per CSU requirement, a new RFP was conducted and placed out to bid. CSU Learning & Development established an RFP committee with 27 participants from various campus areas, and the campus stakeholders indicated that the CSU's needs had outgrown the previous training solution.
    - CSU Learn provides a system that meets the CSU's growing needs, including flexibility for training assignment criteria, support for employees with multiple roles, extensive reporting and analytics, and a more dynamic user experience. SkillSoft's client base and success stories reached familiar partners such as the University of California system (UC) and other highly regulated industries including pharmaceuticals and airlines.
- **What does CSU Learn offer?**
    - CSU Learn contains several required compliance training courses, and more than 75,000 online lessons, videos, e-books, and classes.
    - Available content includes, but is not limited to:
        - Customer service
        - Microsoft Office
        - Project Management
        - Time Management
        - Leading Teams
        - Accounting and Finance Essentials
        - Professional Effectiveness
        - Difficult Conversations
        - Verbal/Written Communication
        - Other useful lessons, e-books, and classes
- **How can I login to CSU Learn?**
    - Refer to **How to Login**
    - Visit the Cougar Training Center and select the blue "CSU Learn" button to get started!
        - Select your campus (San Marcos).
        - Login using your campus credentials.
    - Other login portals can be found on the Human Resources website:
        - Training and Development, Professional Development Programs, Work/Life Balance/ Future Planning, and Compliance Training.

- **Why must I take Required Online Compliance Courses?**
    - The CSU requires that faculty, staff, and student employees take certain courses to comply with state and university requirements that are driven by federal law, state law or CSU policy. A majority of these courses will be assigned through the system wide learn management system CSU Learn. For further information regarding these laws and policies that make these courses required, we encourage you to learn more by visiting the Chancellor's Office website CSYOU Compliance Training for CSU Employees.
- **I have taken some of these Required Online Compliance Courses before. Why am I required to take them again?**
    - Content Enhancements
        - Any completed training history/records that were in SkillSoft have carried over to CSU Learn. Some training completions from SkillSoft may count as equivalencies in CSU Learn. However, a majority of employees will be required to renew their compliance content. There have been many course enhancements and improvements, that renewal has been required for all employees to become compliant.
    - Scheduled Renewals
        - Some training must be renewed annually, biennially, triennially, etc.
        - Please select "**Restart**" when launching the training so that the system can successfully register your renewal.
- **I received an email to take a compliance training, but when I click on the link, I don't see a Start button. What do I do?**
    - You may need to select Register first. Once registered, the Start button should appear.
    - Refer to **Complete an Assigned Task/Training for more information**.
- **I completed a course, but it's not showing as "complete". What should I do?**
    - If the option is available, please select the "**Restart**" option when launching the training.
        - Selecting the "*Review*" option will allow you to review the training material, but will *not* count toward your renewal.
    - Enable pop-ups on your browser.
    - Allow 30-60 minutes for the system to update your completion data.
    - Clear your browser cache and cookies or use an incognito browser, and then try launching the course again.
    - Ensure that you have clicked on all available links in the training before exiting.
    - Ensure that all sections of the training have been marked as "complete".
- **I need to exit a course before completing it. How do I pick up where I left off?**
    - Some courses feature a "resume" feature. Once the training has started again, simply select "Resume" to pick up where you left off.
    - Some courses have a navigation panel that you can use to jump forward or back as needed. Note the name of the last sections you completed and, when you reopen the training, click on the section directly following that.
    - For other courses, your only option is to click forward through the pages or videos.

- **I just completed an activity, but where do I print out my certificate?**
    - All completed activities are available via the transcript tile on the dashboard.
    - In your transcripts, click the certificate icon next to your training course in order to print your certificate of completion.
    - Refer to **Transcripts and Certificates of Completion** for more information.
- **I went to transcript, but I don't see my completed activity**
    - Change the drop-down option near the top of the window from "Date Range" to "ALL" to see all completed activities.
    - If you recently completed the training, please allow at least 30-60 minutes for your completion data to be processed and displayed in your transcript.
    - Refer to **Transcripts and Certificates of Completion** for more information.
    - Refer to **Get Help for Common Issues (Troubleshooting)** for more information.
- **Can I take my compliance training on my phone?**
    - No, compliance content is not available by phone. However, compliance courses can be taken on a tablet via a native browser.
- **I want to complete a career development course later; can I save it to my Dashboard?**
    - You can save courses to view or complete later by selecting the favorite icon ( ) next to the title of the course. Later, the course will be directly accessible from the "Recently Viewed" page, accessible from your dashboard.
- **Whom should I contact with any other questions I have about CSU Learn?**

    Human Resources
    hr@csusm.edu
    760-750-4418

Additional Recommendations:

- Chrome or Firefox browsers work best with CSU Learn.
    - If your Browser causes errors, try clearing your cache and cookies.
    - Alternatively, try switching to a different browser or using incognito mode.
- Enable pop-ups on your browser. CSU Learn utilizes pop-up windows for most training.
- When renewing a training, select register and then click the start button. If the option is available, select the restart option.
- In each training, click on every available link prior to closing the window in order to ensure that the system properly processes your completion data.
- Contact Human Resources for further assistance.

Looking for Something Else

Are you looking for information on something else? Try exploring CSU Learn's online help!

- CSU Learn online help has hundreds of topics that can give you both an introductory and in-depth look at concepts and features that might be available to you.
- CSU Learn online help is context-sensitive. That is, when you access it from a page in the system, it automatically loads the help topic most appropriate for that page. If you need help on a certain page, try going to that page first, then clicking **Help** ( ).
- CSU Learn online help is searchable. Try using the Search bar above to search for content by keyword.
- Watch the CSU Learn tutorial video on YouTube at:
    - https://www.youtube.com/watch?v=mOAkfZva1S4

If you have any questions, please contact:

Human Resources

hr@csusm.edu / 760-750-4418.