

QUICK REFERENCE GUIDE:

GETTING STARTED WITH SUMTOTAL PERFORMANCE

Utilize the information below to initially log in to the system and familiarize yourself with the general navigation, including how to view and update your profile in the system. The tips, tools, and tricks section below contains useful information when initially familiarizing yourself with the system, as well as who to contact should you experience any difficulty or require any additional assistance.

Log in to the system:

- Navigate to https://corlearning.sumtotal.host/
- When accessing the system through the County network, you will be signed on via Single Sign On (SSO).

Click HERE to access SumTotal Performance

General navigation:

• Navigate to the "Self" tab on the top left-hand side of the screen. Here, you will find the following menu options:



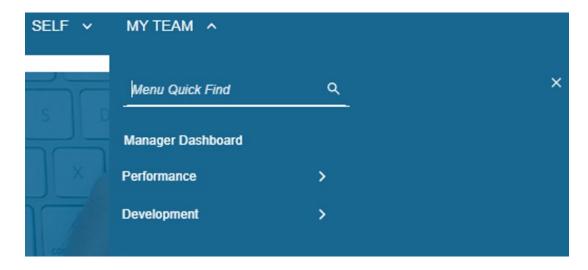
- · Utilize the Performance menu to:
 - o Access your own performance evaluations and goals, as well as your goal plan.
- Utilize the Development menu to:
 - o Access your own development plan or run a competency, skill, or training analysis.
- Utilize the Collaboration menu to:
 - o Access the Continuous Feedback tool.
- Navigate to the "My Team" tab on the top left-hand side of the screen. Here, you will find the following menu options:



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 Navigate to the "My Team" tab on the top left-hand side of the screen. Here, you will find the following menu options:



- o Utilize the Performance menu to:
 - o Access the "Batch Print Wizard," where you can print evaluations for your team.
- o Utilize the Development menu to:
 - o Access your team's development plan.
- Navigate to your "Timeline" on the left-hand side of the screen.
 - o Click on "Tasks"
 - o If a performance evaluation for one of your employees is due, it will populate as a task in your timeline. Click "Go" on the right-hand side of the screen to launch.

Getting Started Tips, Tools, and Tricks:

- If you do not have access to the system or need help with your login user ID or password, please contact the IT Help Desk at 951-955-9900.
- SumTotal Performance runs best when accessed via the Chrome internet browser.
- New employees will be granted access to the system within approximately two weeks of their hire date.
- Your "Profile" is a specialized dashboard where you can view important information related to your assigned tasks, work history, and any direct reports. To access your profile, click your profile photo.
- Information in the system is populated through PeopleSoft. Information is refreshed on a nightly basis. If any of the information that has already been pre-populated is incorrect, please contact PerformanceMgmt@Rivco.org.

Read more about SumTotal Performance by accessing the <u>Performance Management guidebook</u>.

Still have questions? Reach out to the Performance Management Team at PerformanceMgmt@Rivco.org.