



Learning Management System

LMS Mobile Application

LMS Learner Guide

August 2024

LMS Version 24.2

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Introduction

About This Guide

This guide provides learners with an overview and instructions about the features and workflows available in the SumTotal Mobile app.

Using the Mobile as a Learner: Tasks performed in the Mobile app, such as navigating the menus, searching for content and launching training.

Before You Begin

- Make sure your device supports the Mobile app.
- This guide assumes you have a working knowledge of general LMS functions and processes within the desktop version of the LMS.

Important

When using the mobile app on either a personal or PHS issued device, the Compensation for Attendance at Meetings and Training Sessions [HR.PHS-E.703](#) policy applies. Currently BYOD (Bring your own device) personal mobile devices, are not supported or managed by PHS. Technical support for our PHS applications on personal devices is provided with our best effort using instructions provided by IT. More on Personal devices: [IT Client Services \(Device\) Policies](#).

Using the Mobile App as a Learner

Getting Started with SumTotal Mobile



Overview

Launch SumTotal Mobile

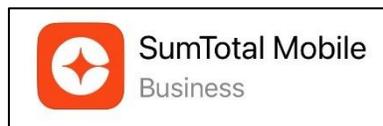
SumTotal Mobile supports the same languages as the SumTotal website. When you launch the app, it checks the language or locale set on your mobile device and, if the language is supported, it automatically displays in that language. If the language set on your device is not supported, the app displays in U.S. English.

Important: *If you are launching the Mobile app on a shared device, remember to log out and log back in again so that you don't end up performing actions on someone else's account.*

Steps

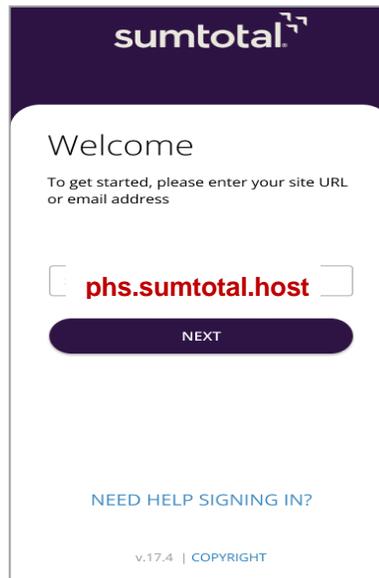
Log In

1. Perform the following steps if you're logging in for the first time. Otherwise skip to Step 2.
 - Download SumTotal Mobile from your app store.



Note: *The language the app uses is based on the language/locale settings on your mobile device. If you use a language that's not supported, the app displays in U.S. English.*

- Locate the SumTotal Mobile icon. Tap to launch.
- Perform the following:
 - If you didn't connect to the app from a direct link, enter the **Mobile Site URL** as it appears in the **Mobile Access Enabled** notification. Tap **Next**. Site URL: **phs.sumtotal.host**

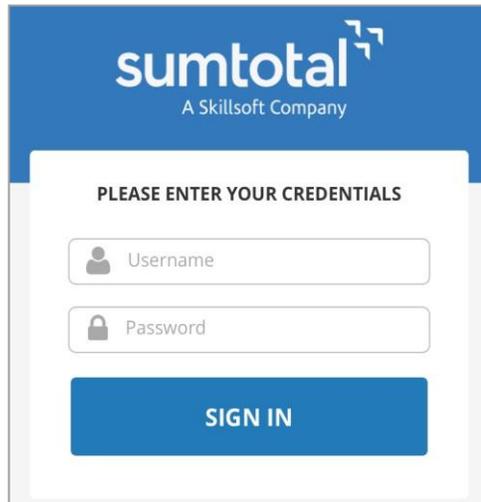


Note: The log in screen displays a **Need Help** link, the **app version**, and a **Copyright** link. The **Need Help** link allows access to help information pertaining to the app.

Keep the following considerations in mind:

- You must be online during your first log in attempt. During the first log in attempt, the mobile app validates the mobile site URL and your login credentials. This validation cannot be completed while you are offline. If the URL is valid, the app saves the URL so that you do not have to enter it again. Site URL: **pht.sumtotal.host**
- During your first login attempt, the Presbyterian logo does not appear on this screen because the app has not connected to the server yet. After you log in once, when you log in again, you will see this logo.
- Provided users enter the correct mobile site URL, the app appends the "/core" extension to the URL automatically, allowing users to proceed to the next step of the login process.

2. Based on Single Sign On process for Presbyterian,
 - Enter your **Username** and **Password** and tap **Sign In**.



Note: As a result of an enhancement where secure storage is on by default, **Android** users must set up a device screen lock (such as PIN, biometric, pattern, etc.) before accessing the app. (The device lock is not enforced for iOS.) If Android users try to launch the app without setting up a screen lock, they are prompted to set up the lock with the following message: **Enable the screen lock.**

- Follow the prompts on screen to continue.
3. If you're logging in for the first time, set a four-digit numeric PIN for offline access later. The PIN is device specific. For example, if you access the app on your smartphone then later access it on a tablet, you must create another pin because it is a new device.
 4. You will be redirected to the Microsoft **Authentication** page where you should follow the on-screen prompts to complete the authentication process.
 5. The SumTotal Mobile **Home** page opens.

LMS Mobile – Mobile Home Page



Overview

SumTotal Mobile App Home Page

The Mobile Home page is a gateway showing users what the app has to offer them. Like a storefront window, it gives users a peek inside the app. It's simple and intuitive, providing users with clear site navigation, site-wide search capability, and multiple ways to access content.

Note: *The Mobile app always displays in portrait mode.*

On your Home page you will be able to:

1. Browse **Mobile widgets** to quickly access content.
2. Use the **Mobile menu** to navigate to a variety of Mobile pages.
3. Access your profile **QR Code**.
4. Modify app-specific user **Settings**.

Steps

1. Use the **LMS Mobile – Launch SumTotal Mobile job aid**, to log into the LMS SumTotal Mobile App.
2. The SumTotal Mobile **Home** page opens.

Mobile Home Page - Supported Mobile Widgets

Current Tasks: Displays tasks such as pending approvals, checklists and evaluations.

My Courses: Displays all incomplete registered and assigned activities.

- If you're registered for an activity made up of other activities (such as a curriculum or ILT course), you may see just the top-level activity (like the curriculum) or you may see both the top-level activity and the activities included within it (like the online courses that comprise the curriculum). If you just see the top-level activity, tap its name to go to its details page and access the included activities.
- Activities may be arranged by End date (soonest first) or Publication date (newest to oldest).

My Learning Assignments: View up to 20 current, incomplete assigned learning activities. Activities may be arranged by Due date (soonest first) or Publication date (newest to oldest), depending on the learning activity's settings.

Resume Learning: Provides user with quick access to all recently launched or incomplete training items. If there are no in-progress courses for a user, then the Resume Learning widget does not appear on the home page.

Navigation Buttons

Available buttons on the navigation bar automatically center across the bar at the bottom of the screen. When you select a navigation button, it stays highlighted while on a related page.

These navigation buttons are the following:

- **Home:** redirects to the dashboard,
- **Courses:** opens the courses page,
- **Library:** opens the content library, and
- **Search:** allows access to Enterprise Search.



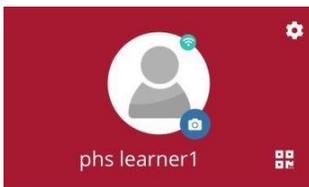
Mobile Menu

Tap  to view the Mobile menu.

At the top of the menu, you'll see a mini profile.

At the bottom of the screen, you'll see navigation that allows quick access to some pages.

Myself



MYSELF

-  Home
-  Courses
-  My Checklists
-  Evaluations
-  Training Transcript

MY TEAM

-  Team
-  Observer Checklists

 Signout _____

Home: Tap to access the mobile Home page.

Tasks: View incomplete, assigned tasks.

Courses: Interact with your in-progress, downloaded, and assigned activities.

My Checklists: Manage your observation checklists.

Evaluations: View your assigned activity evaluations.

Training Transcript: View your completed learning activities.

Instructor Schedule: View and manage the roster for any learning activity you are flagged as an instructor for.

Content Approvals: Approve or reject uploaded content submitted as learning activities.

My Team



Team: Access your team, view profiles, and complete relevant workflows.

Observer Checklists: Manage observation checklists that have you assigned as an observer.

Signout: Log out of your current user sign-in.

MYSELF

- Home
- Courses
- My Checklists
- Evaluations
- Training Transcript

MY TEAM

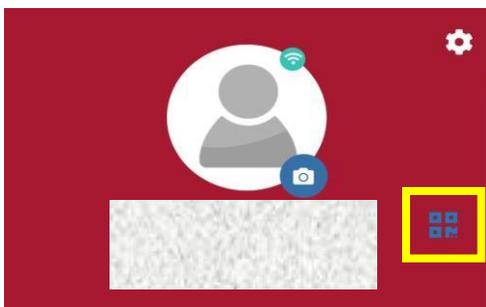
- Team
- Observer Checklists

Signout

Access Your Profile QR Code

Each user account has a unique profile QR code available from the Mobile app. You may need to access or download this code so an instructor can mark your attendance on a learning activity.

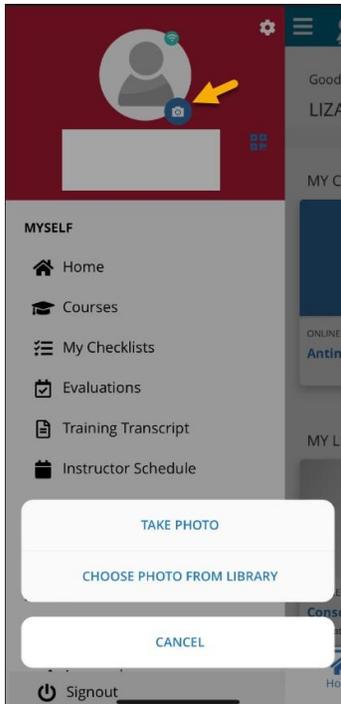
- If you're accessing your profile QR code for the first time, ensure you're online. If you've already generated your QR code, you can access it even in offline mode.
- Tap the QR code icon next to your name.



- From here, show the profile QR code to your instructor so they can scan your attendance

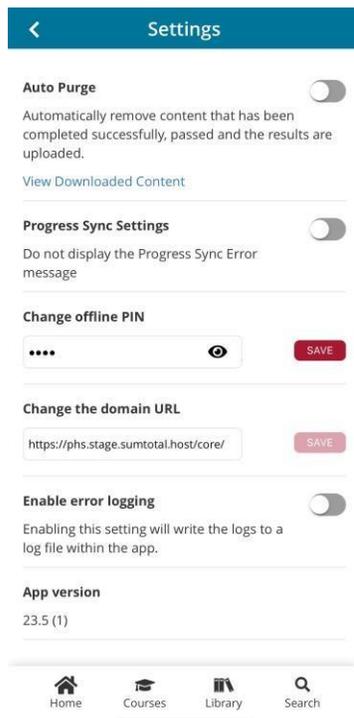
Uploading a Profile Photo

- You can upload a photo to your profile by clicking the camera icon.



User Settings

Tap  to modify app-specific user **Settings** such as Auto Purge, Progress Sync Settings, and the domain URL and change your PIN.



LMS Mobile – Search for training from the Courses tab

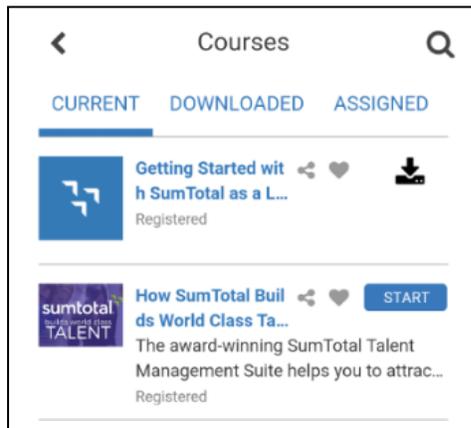


Overview

Quickly find and interact with your in-progress, downloaded, and assigned activities.

Steps

1. Launch the Mobile app.
2. Confirm that your device is online.
3. Tap  to access the **Menu**.
4. Tap **Courses**.

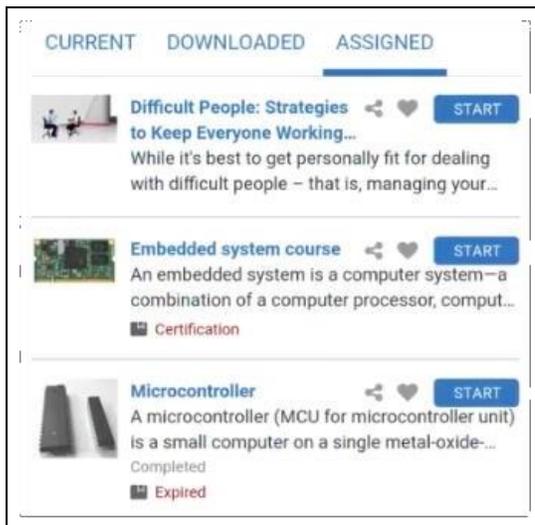


5. Select one of the tabs. The tabs don't all display at once. Swipe right or left in the tab bar to see them all.
 - **Current:** Lists all registered or in-progress activities.
Note: If you're registered for an activity made up of other activities (such as a curriculum or ILT course), then depending on company settings, you may see just the top-level activity (like the curriculum) or you may see the activities included within it (like the online courses within the curriculum). If you only see the top-level activity, tap its name to go to its details page and access the included activities.
 - **Downloaded:** Lists all activities you have downloaded to your device.
Note: If you're sharing this device with other users, keep in mind there may be activities under your **Downloads** tab that you didn't download yourself.

Tip: If you don't see an activity, you previously downloaded, your administrator may have removed or modified the activity. When you logged back online, the Mobile app automatically deleted the downloaded activity because it was no longer up to date. If the activity is listed on the **Current** tab, then you'll need to restart it from the beginning. Otherwise, you don't need to take the activity anymore.

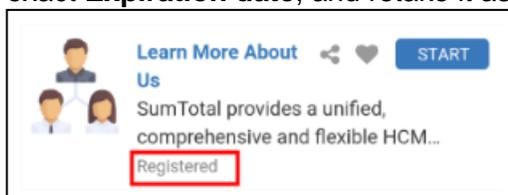
- **Assigned:** Lists all unsatisfied assignments. This includes:
 - Activities (including certifications) you haven't successfully completed yet.
 - Activities you need to retake because they are either about to expire ("Expiring soon") or have already expired ("Expired").
 - Activities you previously completed that were reassigned to you. You need to take them again to satisfy the assignment.
- **Attachments:** Displays activities that allow you to attach files and submit them for review. If an activity's **Status** reads "Pending File Upload," click its name to go to its details page and submit your files.

Activities may appear in more than one filtered list. Each filtered list shows the status and available actions for each activity.



Activity names and descriptions (if applicable) display. You may also see one of these statuses at the bottom of each activity card:

- **Registered:** You've registered for the activity but haven't launched it.
 - **In Progress:** You've launched the activity but haven't completed it.
 - **Completed:** You've finished the activity.
 - **Expiring soon or Expired:** Your completion on this activity is about to expire or it has expired. You need to retake this activity to comply with the training requirements. Tap the activity's name to access its activity details page, find out the exact **Expiration date**, and retake it as needed.



Note: If you haven't registered for or launched the activity yet, no status displays.

6. The actions you can perform on these tabs vary depending on the activity, but you may be able to:

- Tap the activity's name to view its details page.
- Tap **Start** to launch the activity.
- Tap **Register** to register for the activity.
- Tap  to download the activity.

Note: Depending on the learning activity settings, you may see activities that aren't accessible from the Mobile app. These activities are view-only. You can still favorite, share, or rate and review these activities, but you need to log in from the web browser to register for or launch them.

- Tap  to share the activity.
- Tap  to make the item a favorite or tap  to remove it from your favorites.
- From the **Downloaded** tab, you can also:
 - Tap  to delete one or more courses. Select the course(s), then tap **Delete** to confirm deletion.

Important: If you delete a downloaded curriculum or simplified curriculum, it deletes every activity included in that curriculum. If you just want to delete some of the activities (like a completed course or document), find the individual activity on the list and delete it instead.



- Tap **Delete All** if you want to delete all downloaded content on your device.

Note: If you delete a course, SumTotal Mobile retains any progress data until it is synced back to the Learning Management server. This sync occurs the next time you log in to the app while online.

Known Issue for Screen Readers: For iOS and Android users, when you download a course and attempt to delete it, the voice control cannot read the **Delete** icon aloud.

LMS Mobile – Search for training using the Library tab

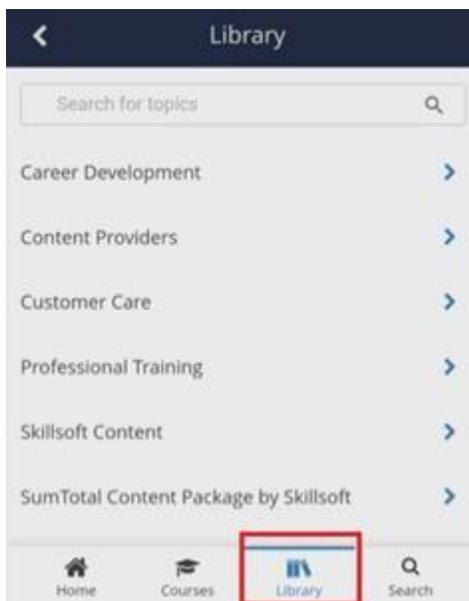


Overview

The Library is a collection of learning activities organized by topics and subtopics. You can use it to find new training that relates to your interests. **Tip:** The Library is most useful if you're interested in a particular subject or are just browsing to see what sort of training looks helpful to you.

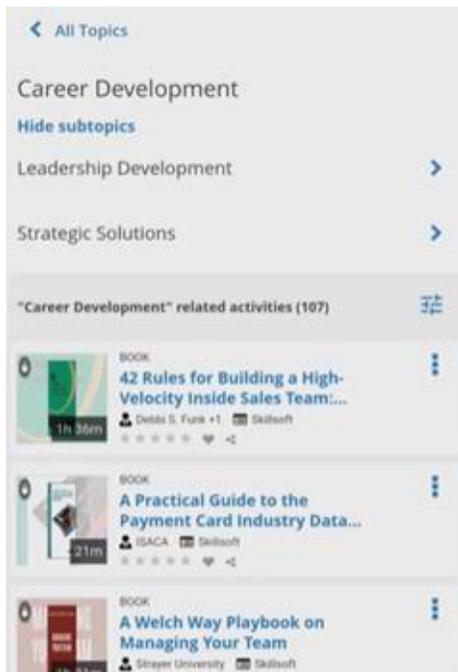
Steps

1. Confirm your device is online. The Library is only available while online.
2. From the bottom navigation bar, tap **Library**. You'll see a **Search** bar and a list of Library topics.



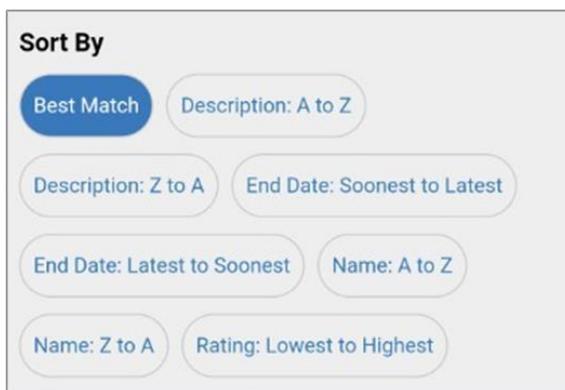
3. If needed, enter keyword(s) in the **Search** bar to narrow the list of topics that display.
4. Tap a topic to view the activities included in that topic and all its subtopics (if it has any). If the topic has subtopics, you'll also see these listed below the topic's name.

Below the subtopic list, you'll see the topic's title and "related activities" with a number next to it such as "Related activities (107)" in the example below. This shows you how many activities are included in that topic and its subtopics.

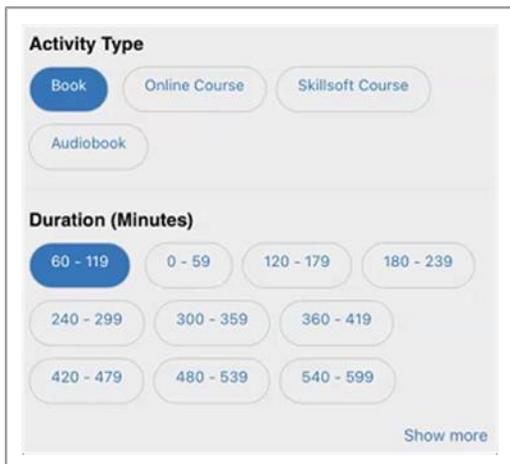


5. To organize or narrow your results. You can:

- Tap a subtopic to only see activities included in that subtopic (and any of its subtopics). **Tip:** If you don't need to browse subtopics, tap **Hide subtopics** to simplify the view. You can also tap **Show subtopics** to expand the list again.
- Tap  to access a list of sort and filter options, then make your selections and tap Apply.
- Under Sort by, change the sort order (such as by Name). You can only select one option in this section.



- Scroll down to select available filters. For example, if you're accessing the Learning search type, you could filter by Activity Type or Duration. If you need to see more options within a filter, tap Show More to see the full list of options and Show Less to hide the list again. Any options you select automatically display at the top of the filter's list so that you can easily see your selections even if you tap Show Less to hide the full list again.



Criteria within a single filter category are grouped by an OR clause, while criteria across filter categories are grouped by an AND clause.

As you tap search filters or enter data in them, the list of available filters auto- updates. For example, if none of the curricula have a duration associated with them, then when you select Activity Type > Curriculum, the Duration (Minutes) filters no longer display. This ensures your applied filters always include at least one search result. If you de-select **Activity Type > Curriculum**, then **Duration** (Minutes) returns to the list of possible filters.

Note: If you enter From and To dates in the Start Date filter, the system pulls every result that takes place between the entered dates from 12:00:00 AM on the From date to 11:59:59 PM on the To date. Mobile Search automatically converts activity times and dates to your mobile device's time zone so that, if you're looking for training while traveling, the activity's date and time matches your current location.

You can tap as many options in these sections as needed. If you want to start over, tap Clear All to remove all filters. Remember to tap Apply when you're done.

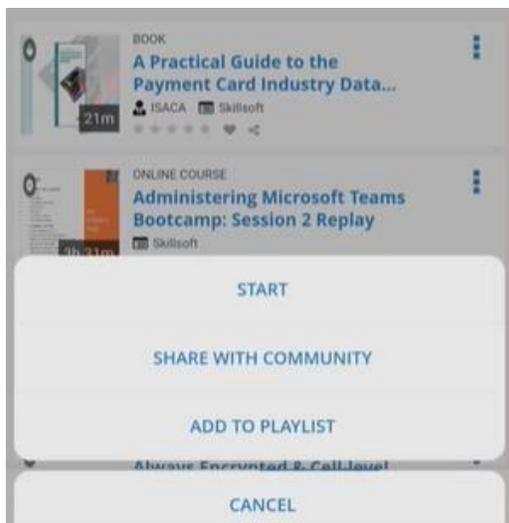
6. Once you find your desired search item(s), you can perform actions on it. The actions available depend on the search type you chose previously:

Learning or Learning Content: You may be able to:

- Tap The "Share" icon. It resembles a "less than" math symbol.
- Tap An empty heart icon to make the item a favorite or tap A full heart icon to remove it from your favorites.
- Tap the activity's name to view its details page.
- Tap Kebab menu icon to perform additional actions, such as registering for, or launching the activity.

When searching for learning activities, keep the following in mind:

- Depending on your learning activity settings, you may see activities that aren't accessible from the Mobile app. These activities are view-only. You can still favorite, share, and review these activities, but you need to log in from the web browser to register for or launch them. **Tip:** If you find a browser-only activity that you're interested in, you can share it with yourself, mark it as a favorite, or add it to a playlist so you can find it later.
- If you found an activity in Search and it's marked as a "Video," it may be a part of a larger course. These are called "micro-learning videos." You can't tap these activities because they don't have a details page. When you Start a micro video, you're taken to the spot in the course where the video is located.



LMS Mobile – Search for training using the Search tab

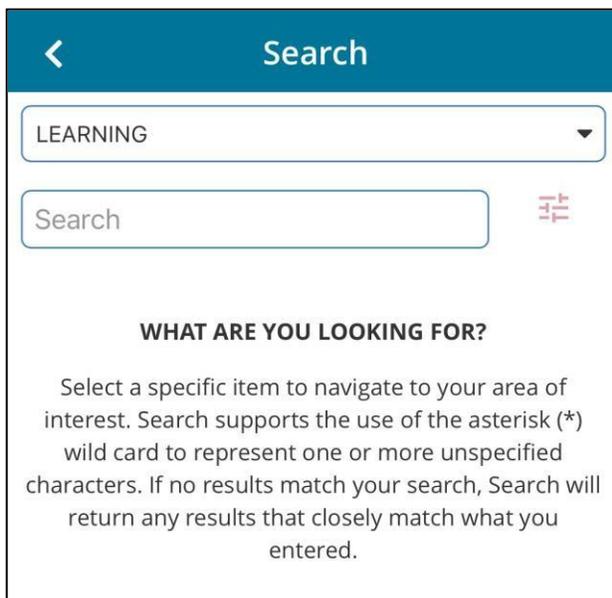


Overview

Home page widgets and the mobile Menu are available for users who prefer browsing as their primary navigation method. What about users who know specifically what they're looking for? SumTotal Mobile's site-wide search capability lets users find exactly what they're looking for, including learning activities, other users, and communities.

Steps

1. Locate the SumTotal Mobile icon on your device. Tap to launch.
2. Confirm your device is online. Search is only available while online.
3. Tap the Search icon in lower right-hand area.
4. You will see Learning by default.



5. Enter your search criteria. If you need to quickly delete your text, tap the X in the far right of the Search box. Once you begin typing, Enterprise Search may display up to 10 auto-complete options. The options that display are based on the keywords you enter and update as you type.

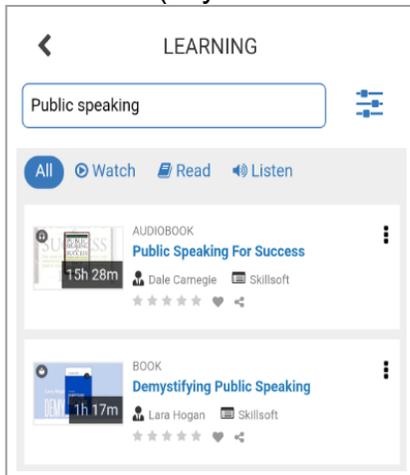


From here, you can:

- Tap an auto-complete option to go to its search results page.
- Tap the arrow to the right of the auto-completion to paste that text into the search box.



- If no matching auto-completion results appear, you can either press Enter or tap See all results for “(keywords entered)” to view a list of all results that match your entry.

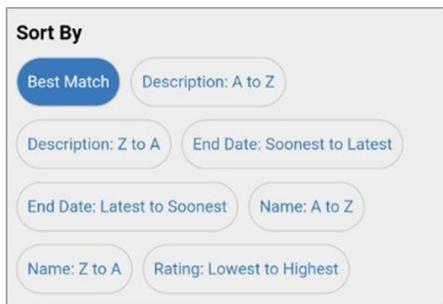


6. Sort or filter your search results as needed.

- If you're searching for learning activities, you may also see modality filter tabs (such as Read or Listen) above your search results. You can use these to narrow your selection based on how you'd interact with the activity.

- Tap  to access a list of sort and filter options, then make your selections and tap Apply.

- Under Sort by, change the sort order (such as by Name). You can only select one option in this section.



- Scroll down to select available filters. For example, if you're accessing the Learning search type, you could filter by Activity Type or Duration. If you need to see more options within a filter, tap Show More to see the full list of options and Show Less to hide the list again. Any options you select automatically display at the top of the filter's list so that you can easily see your selections even if you tap Show Less to hide the full list again.



Criteria within a single filter category are grouped by an OR clause, while criteria across filter categories are grouped by an AND clause.

As you tap search filters or enter data in them, the list of available filters auto- updates.

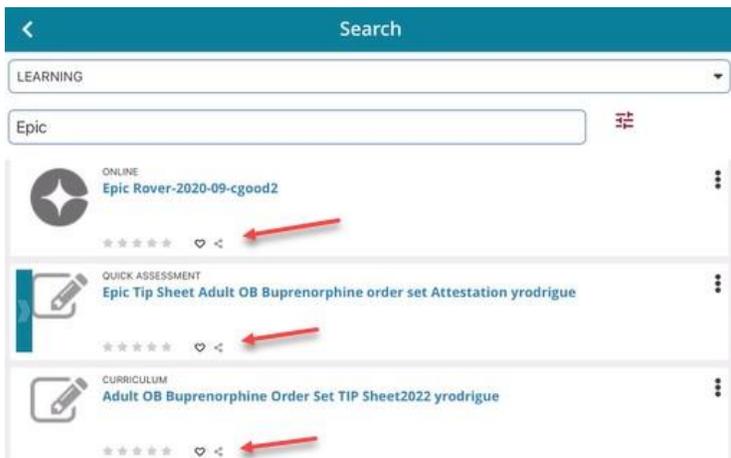
Note: If you enter From and To dates in the Start Date filter, the system pulls every result that takes place between the entered dates from 12:00:00 AM on the From date to 11:59:59 PM on the To date. Mobile Search automatically converts activity times and dates to your mobile device's time zone so that, if you're looking for training while traveling, the activity's date and time matches your current location.

You can tap as many options in these sections as needed. If you want to start over, tap Clear All to remove all filters. Remember to tap Apply when you're done.

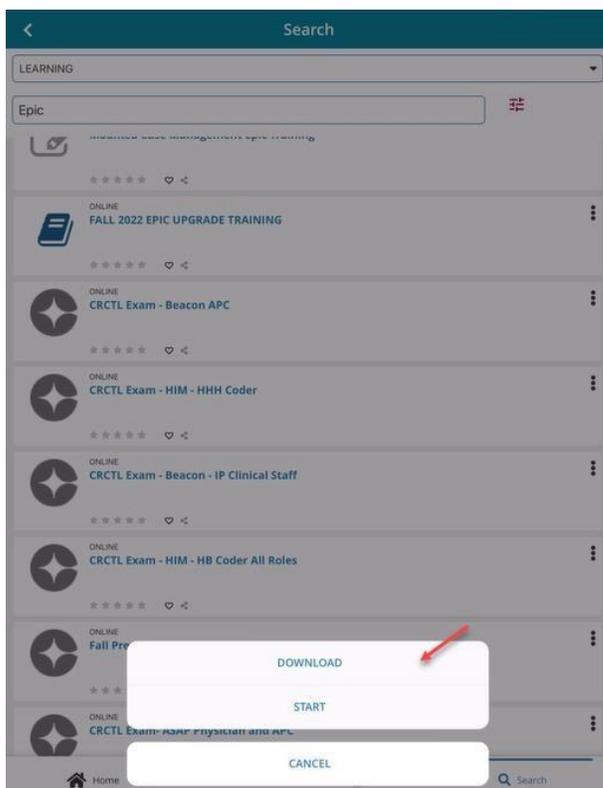
7. Once you find your desired search item(s), you can perform actions on it.

You can:

- Tap the "Share" icon. It resembles a "less than" math symbol.
- Tap the empty heart icon to make the item a favorite or tap A full heart icon to remove it from your favorites.
- Tap the activity's name to view its details page.



- Tap Kebab menu icon to perform additional actions, such as download, view or starting the activity.



LMS Mobile – Register for Training

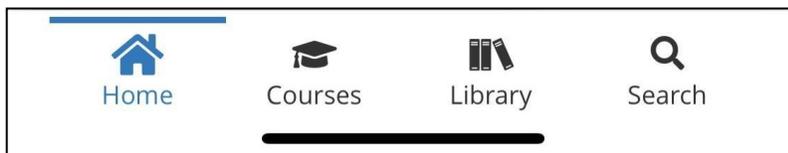


Overview

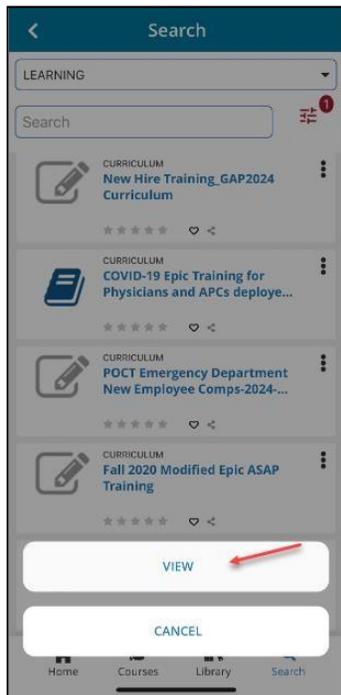
Some activities may require registration.

Steps

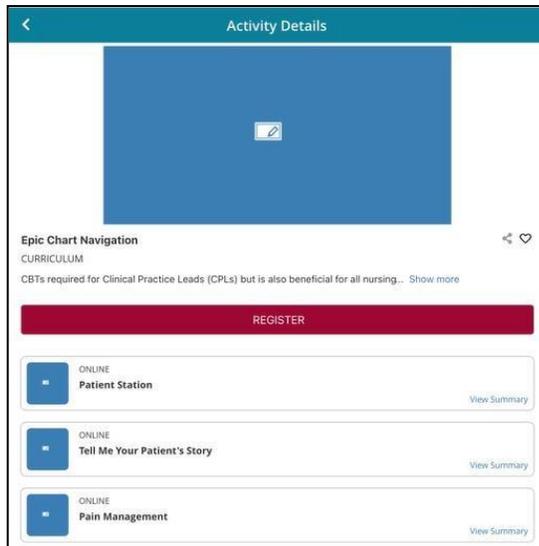
1. Search for your training by using the Courses, Library or the Search tab. In this scenario, we will use a curriculum learning activity.



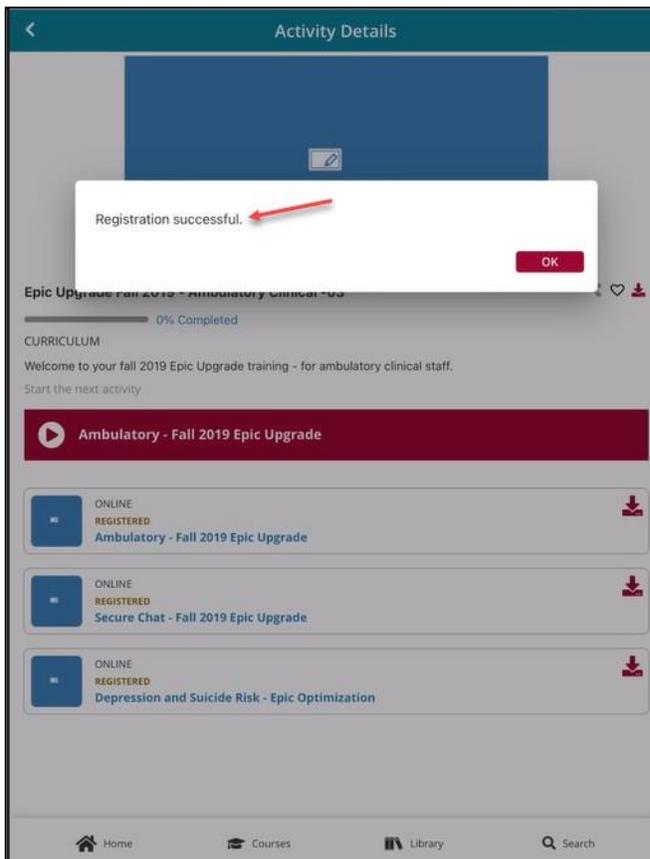
2. Select the Keboob and Click View



3. From the Activity Details page, click Register.



4. You will receive a Registration Successful confirmation message.



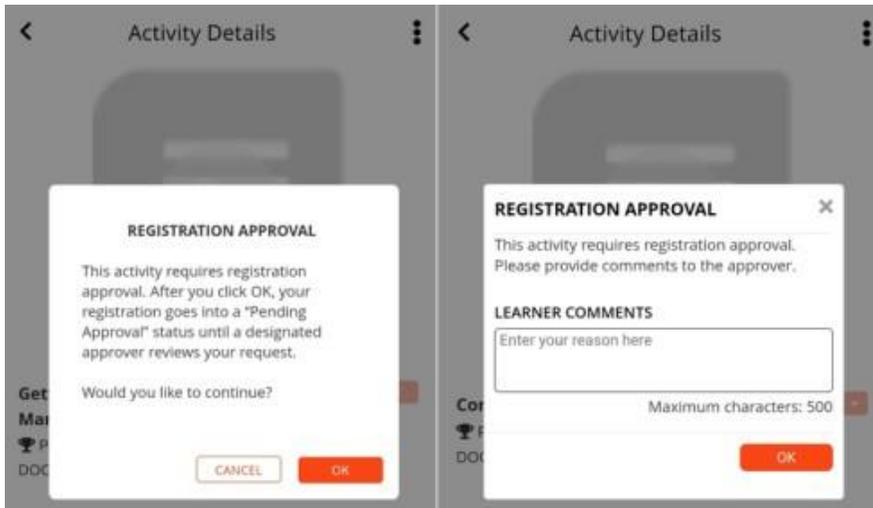
Overview

Once you've found an online activity and (if needed) registered for it, you can launch and complete it.

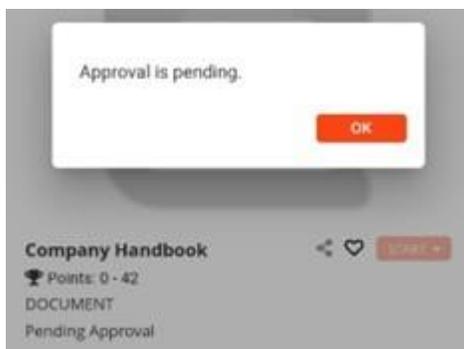
Steps

1. Launch the Mobile app.
2. If you want to launch an online activity, confirm that your device is online. If you're launching a downloaded activity, this isn't required.
3. Find the activity.
 - If you're online, you can launch training from the:
 - Search results
 - Courses page
 - Activity's details page
 - If you're offline, you can only launch downloaded training from the **Courses** page.
4. Tap **Start** to launch the activity.
 - For standalone activities, tap **Start**. If the activity is downloadable, this will take you to a menu. Tap **Start Online** to launch the activity or **Download** to download it. You can also launch an activity by tapping its activity image.
 - For a curriculum, tap its name to go to its details page, then click **Start** next to one of its activities.
 - Don't see a **Start** button?
 - Try tapping  first. Depending on the activity type, the **Start** option may display under this menu instead.
 - If this is a live virtual training session, you won't see the **Start** button until the activity gets close to its start time. The exact time the **Start** button displays depends on the learning activity settings. You may need to wait until the exact start time or you may be able to launch the activity up to 30 minutes beforehand.
 - If you see **Register** instead of **Start**, then you need to register for the activity before you can launch it.
 - Some scenarios may keep you from launching the activity:
 - If the course has an **incomplete prerequisite**, then you cannot launch it. When you tap **Start**, you'll receive a message letting you know what steps to take.
 - If the activity requires approval, you'll see one of the following popups:

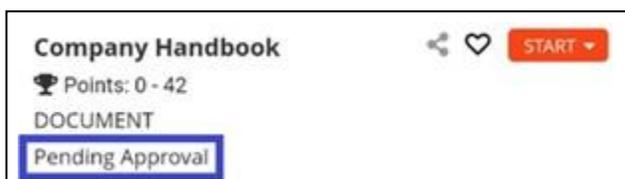
- If you haven't requested approval yet, you'll see a **Registration Approval** popup. If your organization requires **Learner Comments**, enter up to 500 characters and click **OK** to submit your approval request.



If you have already submitted your approval request, you'll see an informational message. Click **OK**.



- Note the activity's "Pending Approval" status on the activity's details page. You can access the activity when its status changes to "Registered."



5. After clicking **Start**, you may see one or more popup messages before you can access the activity. If you see a popup, keep reading for an explanation of these messages.
6. Take the course. Keep the following in mind:
 - The Mobile app only displays in portrait mode, but some online activities are designed to be responsive to both portrait and landscape mode. If the activity looks odd in portrait mode (default), try rotating your phone and seeing if it displays in landscape mode.
 - If you're streaming an online course or video using a 3G or 2G network, you may experience moderate to severe delays in player responsiveness. We recommend streaming activities from a WiFi or a network that's 4G and up.
 - Most learning activities launch within the SumTotal Mobile app. However, if the activity is hosted by another training site (like LinkedIn Learning or Webex), it may launch in a separate browser window, prompt you to download that site's app, or ask you to log in to the external site. This is expected; just follow the instructions on-screen to take the activity.

If you launch an Adobe Connect live event and haven't downloaded the Adobe Connect app yet, you'll be prompted to do so. After you download the app, Adobe asks you to enter the meeting URL. You can ignore this request. Just close the Adobe Connect app, reopen the SumTotal Mobile app, and click **Start** on the live event again. This time, follow the prompts to launch the meeting from the Adobe Connect app.

- Some activities display a pop-up after you launch them asking if you've completed the activity (**Yes** or **No**). SumTotal logs the **Progress Details** (including the **Elapsed Time**) based on the moment you tap **Yes** or **No**, even if the activity is still open in a separate window or app.

As such, we recommend waiting to respond until you've either completed the activity or closed the activity for now and plan to finish it later. That way, SumTotal accurately tracks the time you spent on the activity.

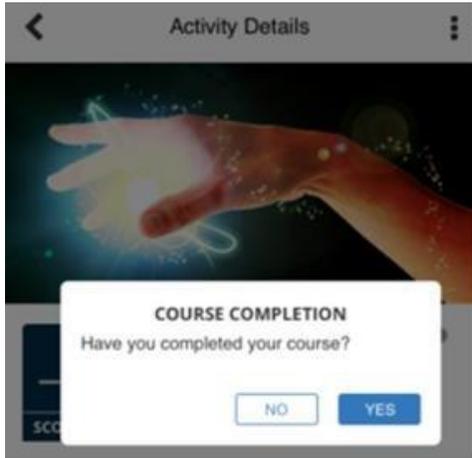
Note: If you use a Windows 10 device, some activities always display the **Elapsed Time** as "0."

If you can't complete the course in one sitting, you can close it and then re-launch it again later using the same steps noted above. After closing an activity, the app redirects you to one of the following pages:

- Standalone activities (including those subscribed to simplified curricula): The activity's details page.
- Direct child activities (that is, activities that only exist within a curriculum): The curriculum's details page.

7. Complete the course.

Depending on the type of training, you may automatically get marked complete once you reach the end of the activity, or you may see a **Course Completion** pop-up after you close the activity asking if you completed it. If you have, click **Yes**.

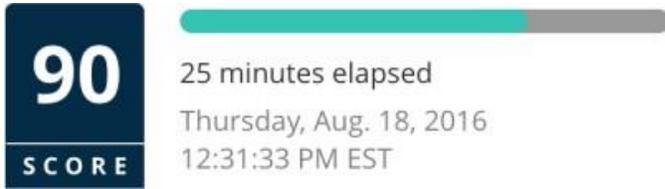


Individual activities get marked as complete when you successfully finish them (“Attended” and “Passed”). If the activity is part of a structure (like a curriculum, ILT course, or Versional), you need to complete the required activities included within the structure. For example, complete the number of required child activities within a curriculum or every required version within a Versional.

8. Depending on activity settings, after you complete and close the activity, you may be redirected to an evaluation questionnaire. You can:
 - Complete the evaluation and click **Submit**. You won’t be able to edit your answers after you submit it.
 - Click **Finish Later** to save any answers but not submit it yet.
 - Click **Cancel** to close the evaluation without saving or submitting.

You can also complete your pending evaluations later from the **Learning Activity Evaluations** page. For more on filling out evaluations, see Complete Evaluations.

9. Upon successful completion, the app provides completion details.



When you complete courses within the app, Learning Management records your completions immediately on the device.

- If you are online, completion details are uploaded to Learning Management immediately.
- If not, then the next time you open the app **on that device** and a data connection is available, completion details are uploaded to Learning Management.

While uncommon, there are two scenarios where the system will not sync your offline progress when you get back online:

- An administrator replaced the activity's content (for example, they re-uploaded an online course). To ensure you complete the most up-to-date version of the activity, the app automatically deletes the downloaded activity and does not sync your offline progress. The activity's status changes to "Registered," it moves to the **Current** tab of the **Courses** page, and you'll need to retake it from the beginning.
- You downloaded the activity as part of a structure (like a curriculum) and an administrator removed the activity from the structure while you were offline. You don't need to take the activity to complete the structure anymore, so the app automatically deletes the downloaded activity and does not sync your offline progress.

Managers and administrators can view completions as soon as they are uploaded to Learning Management.

Tip: Did you finish the activity but it's not showing as complete? Give the system 30-60 minutes to process your information. If the activity still hasn't updated, you may be working with an External Content activity. For details, see Track Online External Content Assessments.

LMS Mobile – Choosing an ILT Class Offering

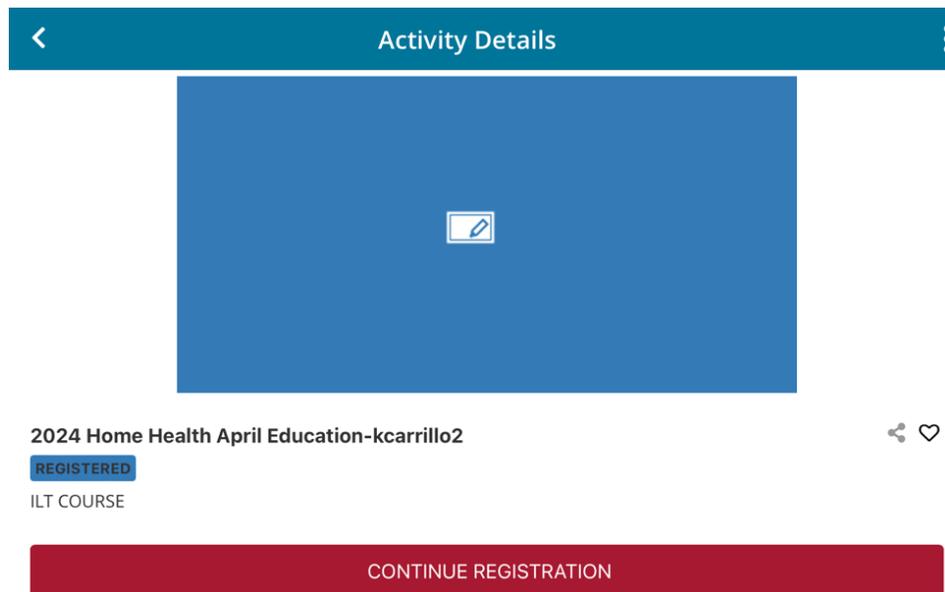


Overview

An LMS Super User can Register a learner for an ILT Course, giving them the opportunity to select an available ILT Class.

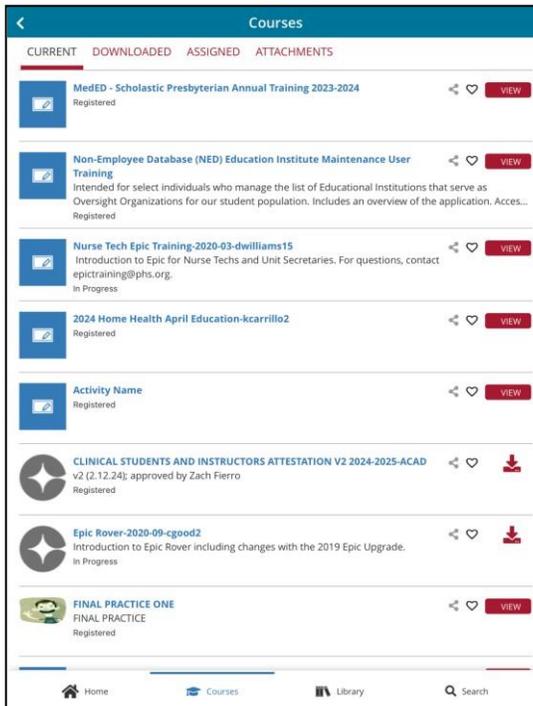
If a learner sees the **Continue Registration** button at the top of the activity's details page it means they still need to choose an offering for an ILT course.

The activity requires additional registration steps before they complete the registration.

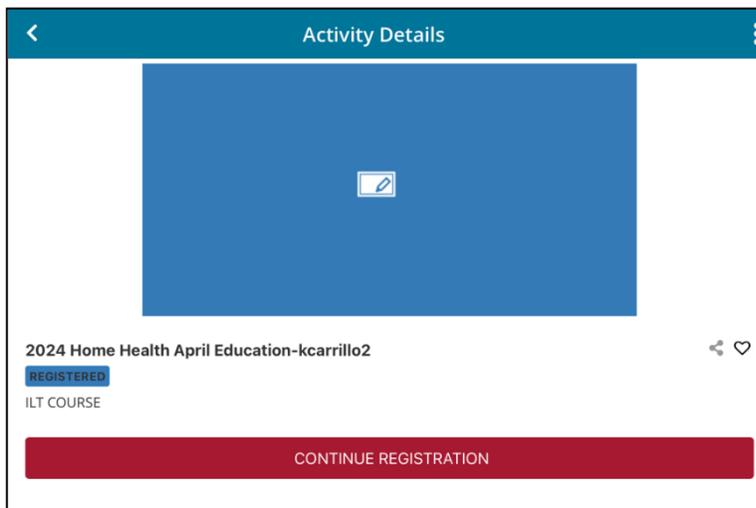


Steps

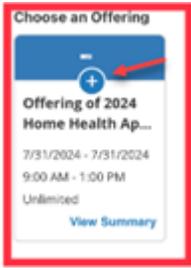
1. From the courses page, locate the ILT Course and click the activity name hyperlink or the View button.



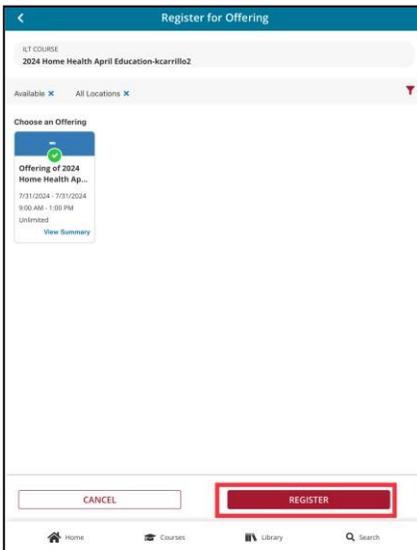
2. Click **Continue Registration** on the activity's details page to open the **Offerings** panel.



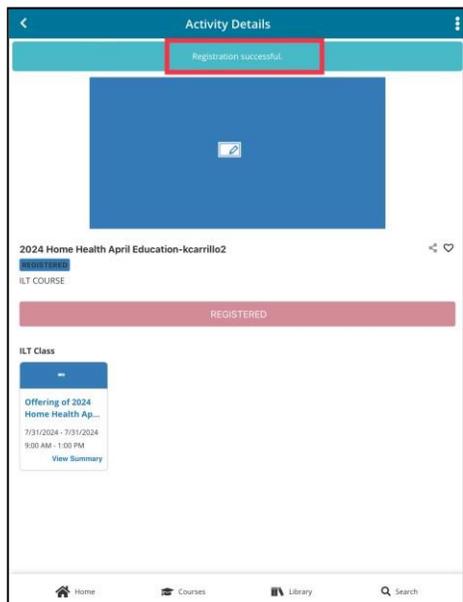
3. Click the plus symbol within the ILT Course tile to choose an offering.



4. Once the offering is selected, Click Register



5. You will see confirmation that the Registration was successful.



LMS Mobile – Download Training



Overview

Some mobile activities are available offline. If they are, you can download them to your device and complete them offline when you have no data connectivity or when you want to limit data consumption.

When you complete an activity offline, progress data is synced back to the Learning Management server the next time you log in to the app while online.

While uncommon, there are two scenarios where the system will not sync your offline progress when you get back online:

- An administrator replaced the activity's content (for example, they re-uploaded an online course). To ensure you complete the most up-to-date version of the activity, the app automatically deletes the downloaded activity and does not sync your offline progress. The activity's status changes to "Registered," it moves to the **Current** tab of the **Courses** page, and you'll need to retake it from the beginning.
- You downloaded the activity as part of a structure (like a curriculum) and an administrator removed the activity from the structure while you were offline. You don't need to take the activity to complete the structure anymore, so the app automatically deletes the downloaded activity and does not sync your offline progress.

Steps

Perform the following steps to download training.

1. Locate the activity. You can download training from:
 - The search results.
 - The **Assigned** tab of the Courses page (if the activity was assigned to you)
 - The activity's details page
 - (Observation checklists only) The My Checklists page
2. If needed, register for the activity first.
3. Download the activity.
 - Depending on the page and activity type, you may be able to tap  to quickly download the activity.
 - If you don't see , tap **Start** and select **Download**.

Keep the following in mind:

- If you don't see a download option, then the activity isn't available offline.
- If the course has an incomplete prerequisite, then you cannot download it. You'll receive a message letting you know what steps to take.

- If the activity requires approval, you'll see one of the following popups:
- You can only download observation checklists that allow self-assessment. Otherwise, the checklist is only available on a computer.
- If you tap  next to a curriculum, it downloads every downloadable activity within the curriculum. Child activities are **not** applicable for download if:
 - The activity is not available offline (for example, it's an on-site ILT class).
 - You have not yet registered for an activity that requires registration.
 - You have already downloaded it (as a standalone activity or as part of another curriculum).
 - If you're downloading a curriculum "in bulk" and the curriculum's activities are available in multiple languages, you must download every activity in a single, common language.
 - If there are multiple common languages, you get to choose the language.
 - If there's only one common language, a pop-up displays telling you the language that the download will use.
 - If the activities don't share a common language or you want to download the activities in different languages, you'll need to download the activities one at a time.

If you want to download individual activities within the curriculum, tap  next to the activity's tile instead of at the top of the curriculum's details page.

4. Depending on learning activity settings, if you've completed the activity before, you may see a pop-up giving one or both of the following options:
 - **Restart:** This happens if the activity allows multiple completion attempts. If you need to retake the course, click **Restart**. This will overwrite your previous completion data. You're re-registered for the activity, the elapsed time restarts, and your registration status returns to "In Progress."
 - **Review:** This lets you look back over the activity. Clicking **Review** won't overwrite your previous completion data.

After you download an activity, you can quickly view and launch it from the **Downloaded** tab of the Courses page.

LMS Mobile – Explore the Activity's Details Page in Mobile



Overview

The activity details page gives you additional information about a learning activity, as well as any available actions you can perform on the activity.

You can access an activity's details page from virtually anywhere you can find an activity, such as the search results and the **Courses** page, by tapping the activity's name.

There are different kinds of details pages depending on the activity's "type," such as "online course" or "simplified curriculum." The type displays in the activity's panel. For example:



For the most part, every activity type has a details page.

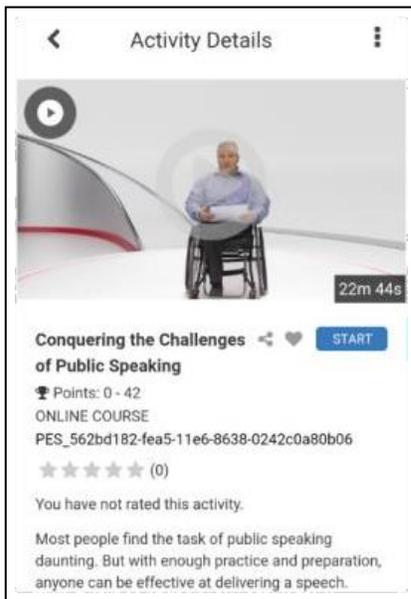
Steps

Depending on the activity type, you may see one of three kinds of details pages:

- **Standard Activity Details Page:** Basic information that displays for all activities.
- **Activities with Child Activities:** Additional information that displays for curricula and simplified curricula.
- **Activities with Offerings:** Additional information that displays for ILT courses and ILT classes.
- **Versions:** Additional information that displays for Versions with one or more active versions.

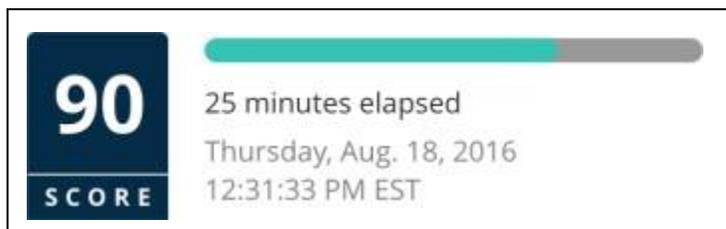
Standard Activity Details Page

When accessing standalone activities, such as online courses and documents, a simple **Details** page displays.



This page displays basic information such as the activity's name, type, and description. Depending on the activity, you may also see:

- The registration status ("Registered," "In Progress," or "Completed") of your current attempt.
- Progress or completion details showing you how far along you are. Again, it depends on the activity, but these details may include a progress bar, your score, the time you've spent on the activity, and/or the last time you launched it.



- How long the activity should take to complete (such as 30 minutes).
- The Event Time indicating when the activity begins and ends.
- The expiration status ("Expiring soon" or "Expired") and Expiration date. This displays if your activity has a date when your previous completion expires or is about to expire. You need to retake these activities to complete your training requirements. Typically, you'll only see an expiration date on recurring training, such as certifications.
- Any completion or assignment message. For example, if an activity was reassigned to you, you'll see a message explaining that you need to retake the activity.

The actions you can perform depend on the activity's settings, but you may be able to:

- Tap  to share the activity.
- Tap  to make the item a favorite or tap  to remove it from your favorites.
- Tap **Register** to register for the activity.
- Tap  to download it.
- Tap **Start** to launch it.
- Tap **Cancel Registration** to cancel your registration.

Tip: Don't see the options above? Try tapping  first.

Note: Depending on the learning activity settings, you may see activities that aren't accessible from the Mobile app. These activities are view-only. You can still favorite, and share these activities, but you need to log in from the web browser to register for or launch them.

Depending on activity settings, you may also see one or more of the following:

Accreditation Details: Some activities earn credits from designated accreditors. This lists the accreditations you'll earn if you successfully complete the activity on the current date. For example, if you see "CME: 5," that means you would earn five credits from the CME accreditor. Keep in mind the active accreditations can change over time, so you may see different accreditations depending on the day you view the details page.

Reference Materials: Your administrator may have attached supplementary materials to this activity, such as a "cheat sheet" document or a walkthrough video. These could be downloadable files or links to online content. Expand this section to view and access these materials as needed.

If you see a section called **Learner Attachment**, you may need to upload one or more files as part of your training. See the job aid for how to **Upload and Submit Activity File Attachments** for instructions.

Note: If you download reference materials or learner attachments from the SumTotal Mobile app using a Windows device, the files get stored at the location:

AppData\Local\Packages\com.sumtotal.mobileapp_.*\LocalState.

This means that, if you uninstall the Mobile app, it automatically deletes any downloaded reference materials or learner attachments. The files are not deleted if you're using an Android or iOS device.

Activities with Child Activities

If the activity is a curriculum or a simplified curriculum, it's comprised of other activities. For simplicity's sake, we refer to the top-level activity as the "parent" and all of the activities within it as "children." In these "parent-child" structures, you'll see a more complex details page.



In addition to the information found on a Standard Activity Details Page, you may also be able to:

- Tap **Register** or **Register Again** to register for the curriculum.
- Tap **Complete Registration** if some of the activities in the curriculum require additional registration steps.
- Quickly launch an activity. If the curriculum has any incomplete, launchable activities, you'll see a dynamic "quick link" button under the curriculum's description. This button displays one of the following:
 - If you don't have any in-progress activities (either because you just started the curriculum or you recently completed an activity in it), you'll see the next incomplete activity in the curriculum hierarchy.
 - If you have one or more in-progress activities, you'll see (1) on a curriculum, the in-progress activity you most recently accessed; (2) on a simplified curriculum, the first in-progress activity in the hierarchy.



Note: This dynamic “quick launch” button only applies to incomplete activities that are launchable from the Mobile app. If there are no incomplete, launchable activities left in the curriculum, the button does not display.

- If the activity is launchable, tap the activity’s name to launch it. If you've downloaded the activity, you can also tap  to launch it.



Note: Depending on the learning activity settings, you may see activities that aren’t accessible from the Mobile app. These activities are view-only. You can still favorite, share, or rate and review these activities, but you need to log in from the web browser to register for or launch them.

- (If applicable) Tap  at the top of the page to download every applicable child activity. Child activities are **not** applicable for download if:
 - The activity is not available offline (for example, it’s an on-site ILT class).
 - You have not yet registered for an activity that requires registration.
 - You have already downloaded it (as a standalone activity or as part of another curriculum).

If you want to download individual activities within the curriculum, tap  next to the activity’s tile instead of at the top of the curriculum’s details page.

Note: If your administrator adds new activities to the curriculum after you’ve downloaded it, these activities won’t automatically download. You’ll need to either download the curriculum again or download the new activities one at a time.

- Tap **Cancel Registration** to cancel your registration.
- **Curriculum Only:** Scroll down to view the list of activities in the curriculum. If the curriculum is divided into objectives, tap to expand them and reveal the activities included in each objective.



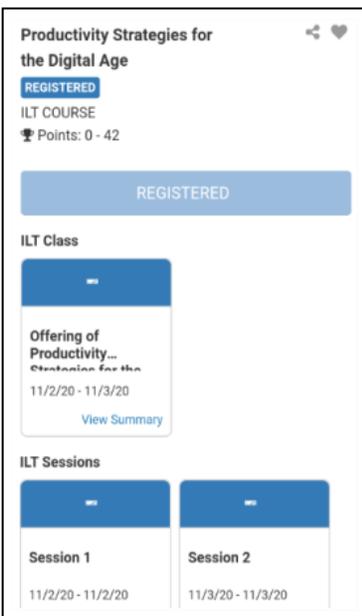
For each child activity, you can also perform individual actions. What you can see and do depends on the activity settings, but you may be able to:

- Tap **View Summary** to see an overview of the activity.
- Tap the child activity's name to go to its details page and perform any available actions (such as launching the activity) as described under Standard Activity Details Page.
- **Simplified Curriculum Only:** Use the two tabs to see:
 - **Activities** included in the simplified curriculum. You can tap an activity's name to view the activity's individual details page and perform available actions. This tab opens by default.
 - **Details** about the simplified curriculum itself.

Activities with Offerings

Some activities have multiple offerings that you can choose from. You only need to register for and complete one of the offerings. The offerings themselves may also be comprised of one or more sessions. The most common offering-based activities are ILT courses. ILT courses are divided into ILT class offerings, which may then be divided into sessions.

Because of this unique structure, the ILT course's activity details page contains the activity's offerings and (if applicable) sessions. You can only access the offering and sessions details pages after you've registered for an offering.



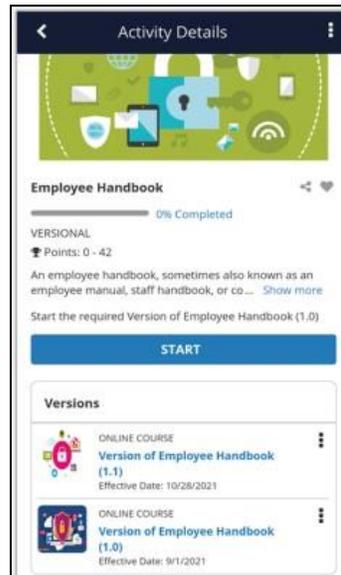
In addition to the information found on a Standard Activity Details Page, once you've registered for the ILT course, you may also be able to:

- Tap the offering's tile to view a summary.
- Tap one of the sessions' tiles to view a summary.

Note: If you see a bell icon next to the View Summary link, this means the session allows learner attachments. Tap the bell to see your attachment's status. See **Upload and Submit Activity File Attachments** for additional instructions.

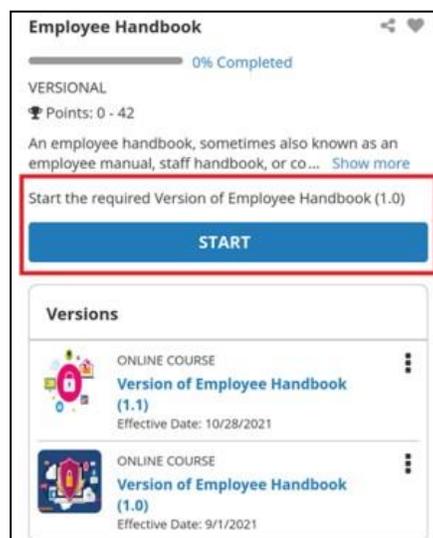
Versionals

A Versional is an activity that gets updated with new “versions” over time. For example, if our organization has annual anti-harassment training, you may need to take a new version each year.



In addition to standard activity actions (like liking or sharing), you may also be able to:

- Quickly launch a version. If the Versional has any incomplete, launchable versions, you'll see a dynamic "quick link" button under the Versional's description. This button displays one of the following:
 - If you don't have any in-progress activities (either because you just started the Versional or you recently completed a version in it), you'll see one of the following:
 - If the Versional requires registration: The latest active version.
 - If the Versional does not require registration: The next required version.
 - If you have one or more in-progress activities, you'll see the in-progress version you most recently accessed.
- Tap **Cancel Registration** to cancel your registration.



- Scroll down to view the list of versions in the Versional.
 - If you had to register for the Versional, this section only lists the latest active assigned version.
 - If you did not have to register, this section lists every active version (both mandatory and optional).



For each available version, you can tap the version's name to go to its details page and perform any available actions (such as launching the activity).

Depending on the learning activity settings, you may be required to complete one or multiple versions. You may also need to complete the versions in order (1.0, then 2.0, and so on). The app will let you know if these requirements exist, such as by telling you if you need to take a previous version first.

LMS Mobile – Understanding Mobile Registration Approvals



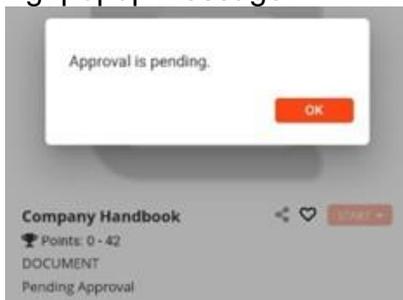
Overview

When launching or registering for activities, you may need to get approval from a manager or qualified approver before your registration can be finalized. Activities that require approval will display a **Registration Approval** popup during the registration, launch, or download workflow.

If the activity requires approval and supports Mobile registration, your registration status changes to "Pending Approval" after you submit your approval request. You can view this status from the activity's details page.



You cannot launch or download the activity while it's pending approval. If you try, you'll receive an "approval is pending" popup message.



There are no Mobile learner pages that specifically display activities pending approval. If you're assigned to the activity, you can view it from assignment pages and widgets, such as the **Courses** page's **Assigned** tab. If you're not assigned to the activity, you may wish to add it to your favorites so you can easily find it again.

Your registration approval request gets sent to one or more designated approvers for review.

- If approved, the activity moves to a "Registered" status and you can launch or download it as needed.
- If rejected, you are not registered for the activity and cannot access it.

Depending on the learning activity settings, you will likely receive an email notification when your request is approved or rejected.

Considerations

Approval Considerations for Activity Structures Registered Through the Mobile App

As a reminder, an activity structure refers to an activity comprised of multiple activities. It is possible for some activities in the structure to require approval while others do not.

If the top-level activity (such as a curriculum or ILT course), requires approval, then you need to get approval for the top-level activity before you can register for the activities in its structure. However, if the top-level activity does not require approval but some of the lower-level activities do, the workflow gets a little more complex:

- **Parent-child structures (such as a curriculum):** Every selected child activity in the structure that requires approval needs to be approved before you can register for any of the structure's activities.

For example, say you register for all three child activities in a curriculum: Course, Document, and Class. Only the Class requires approval. When you register, the curriculum does not display a registration status and **every** child activity is marked "Pending Approval."

- If the Class's registration is approved, the system processes the registrations for every child activity at once. The curriculum and the child activities change to "Registered" and you can access them.
 - If the Class's registration is rejected, you are not registered for the curriculum or any of the child activities. None of the activities display a registration status.
- **Offering-based structures (such as an ILT course):** If the selected offering (ILT class) requires approval but the offered-by activity (ILT course) does not, you'll be registered for the offered-by activity while the offering is pending approval.

For example, say you register for an ILT course that does not require approval, but the ILT class offering you select does require approval. The ILT course is "Registered" and the ILT class is "Pending Approval."

- If the ILT class's registration is approved, both activities move to a "Registered" status.
- If the ILT class's registration is rejected, the ILT course's status changes to "Registration Canceled" while the ILT class does not have a registration status at all.

LMS Mobile – Share Activities with Others



Overview

You can share an activity within the Mobile application.

Steps

You can share an activity anywhere you see the  icon. In Mobile, this is available from:

- Search results
- Library
- Activity's details page
- Activity's completion page
- The following widgets:
 - My Courses
 - My Learning Assignments
 - Promoted Learning Activities
 - Recommended Activities

For example:

Click  to open the Share Activity popup. From here, you can click Copy Link to copy the activity's direct URL and paste it wherever needed (such as an email or direct message).

NOTE: This feature is not supported on the iPad.

LMS Mobile – How to Complete Evaluations



Overview

An evaluation is an anonymous assessment assigned to a learning activity. Your responses to an evaluation are confidential. By participating in evaluations, you can provide feedback to the training staff. An evaluation might ask questions about the content of a class, the delivery of the content, or the resources provided to aid with delivery of the training content.

You may be assigned numerous evaluations for assessing learning activities in which you are enrolled. You can view your evaluations from the **Evaluations** page.

Steps

1. From the Mobile Home page, tap  access the Menu.
2. Tap **Evaluations**.
3. Find the evaluation(s) you want to complete.
Evaluations are listed on the Evaluation Summary page by due date. The evaluation with the nearest due date is listed at the top. Use the tabs to navigate to:
 - **Pending:** Evaluations you haven't submitted yet.
 - **Expired:** Evaluations that have passed their expiration date. You can no longer access these evaluations.
 - **Completed:** Submitted evaluations. You can review your answers but can't edit them.

Tip: If you see a completed evaluation that you don't remember submitting, it means another user (such as an instructor or administrator) filled it out on your behalf. If you have any concerns about the answers provided, please talk to your supervisor.

4. To complete an evaluation, tap  from the Pending tab and tap **Start Evaluation, Download or Cancel**. You can also choose to **Download** the evaluation if you want to finish it offline.



5. Follow the prompts to answer the evaluation's questions.
6. Perform one of the following:
 - If you're not ready to submit yet, tap Save to save your answers. You can close the evaluation and complete it later.
 - If you're ready to submit the evaluation:
 - i) Click **Submit**. Once you submit the evaluation, you can no longer edit your answers.
 - ii) Click **OK** to confirm.

X Instructor Led Training Ev...

INSTRUCTIONS

Please choose from the options in the answer section.

QUESTION 1 OF 4

My instructor encouraged participation within the class.

Yes

No

5. Follow the prompts to answer the evaluation's questions.
6. Perform one of the following:
 - If you're not ready to submit yet, tap Save to save your answers. You can close the evaluation and complete it later.
 - If you're ready to submit the evaluation:
 - i) Click **Submit**. Once you submit the evaluation, you can no longer edit your answers.
 - ii) Click **OK** to confirm.

X Instructor Led Training Ev...

INSTRUCTIONS

Please choose from the options in the answer section.

QUESTION 1 OF 4

My instructor encouraged participation within the class.

Yes

No

< > Save Submit

5. Follow the prompts to answer the evaluation's questions.
6. Perform one of the following:
 - If you're not ready to submit yet, tap Save to save your answers. You can close the evaluation and complete it later.
 - If you're ready to submit the evaluation:
 - i) Click **Submit**. Once you submit the evaluation, you can no longer edit your answers.
 - ii) Click **OK** to confirm.

X Instructor Led Training Ev...

INSTRUCTIONS

Please choose from the options in the answer section.

QUESTION 1 OF 4

My instructor encouraged participation within the class.

Yes

No

LMS Mobile – Access the Training Transcripts

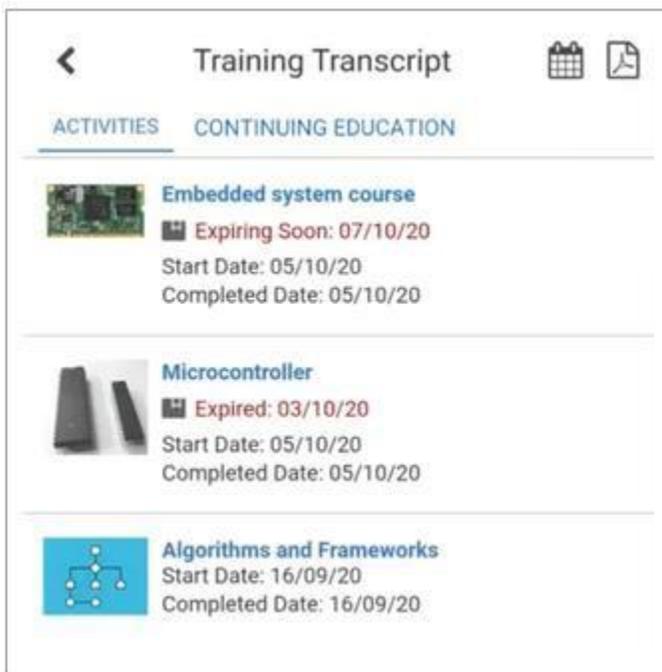


Overview

Once you've completed an activity, you can Access the Training Transcript (below) to view it. View and export summary of the learning activities you've completed from the Training Transcript page.

Steps

1. Launch the Mobile app.
2. Confirm that your device is online.
3. Tap  access the Menu.
4. Tap Training Transcript.
Activities are listed on the transcript by completion date, in descending order.



5. You will see various tabs on the **Training Transcript** page:

Activities (default tab): View your completed activities.

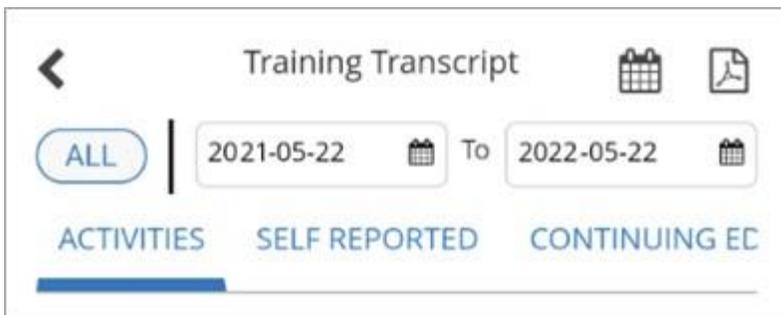
- If you see an expiration status (“Expiring soon” or “Expired”), this means your completion on this activity is about to expire or it has expired. You need to retake this activity to comply with your company's training requirements. Tap the activity’s name to access its activity details page, find out the exact Expiration date, and retake it as needed.

- If you've completed any Versional activities, depending on activity settings, you may also see a compliance status:
 - Compliant:** You've completed all required versions.
 - Compliance not yet effective:** You need to complete a new version that has not yet reached its effective date.
 - Compliance expired:** You need to complete a new version that has passed its effective date.

Continuing Education: If you have been assigned any continuing education activities, click this tab to view past completions.

- From the **Training Transcript** tabs, you can:
 - Tap an activity name to view its details page.
 - Narrow the list of activities based on the date you completed them.

i) Tap  to reveal date range options.



- Tap **All** to view a full summary of your entire activity history.
- Tap the date fields to set a start and end date.

(**Activities** tab's **All** view only) If the activity has a diploma associated with it, tap  to view a preview of the diploma. From here, you can also click  to download the diploma to your device's storage.



7. Tap  to export the transcript.

The mobile **Training Transcript** displays the **Activity Name** and the next four fields that display on the **Training Transcript** in the web browser. (Grouped fields are ignored.) These fields vary, but may include details like the activity's **Start Date**, **Completion Date**, or **Score**.

If there is no value for one of these fields for an activity, then the field is not displayed. For example, if **Score** is one of the first four fields configured in the Training Transcript, but an activity does not have a score, then there will be no score displayed for the activity in the mobile transcript.