



DEVELOP INDIVIDUAL GROWTH

# User Guide

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## Overview

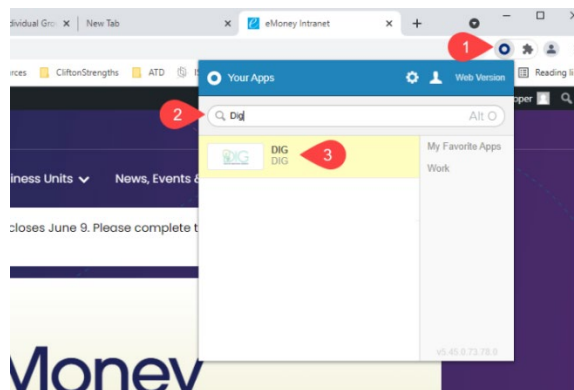
DIG (Develop Individual Growth) is eMoney's learning management system (LMS). DIG is a comprehensive system used to deliver instructor led training, self-paced eLearning courses, and other learning resources. This section will provide an overview of DIG including how to access DIG, the dashboard, screen layout, basic navigation, and key features.

### Accessing DIG

DIG is accessed via OKTA.

1. Click the OKTA browser plugin
2. search for DIG and
3. Click the application tile.

DIG will open in a new tab.



### Home Dashboard

Your home dashboard will be displayed when you first access DIG or whenever you click the DIG logo in the Header. The home dashboard provides easy access to your current learning assignments.

MY PENDING ACTIONS

5 Total Incomplete Activities

1 Critical Activity

3 Assigned Activities

3 Ongoing Activities

1 Upcoming Activity

0 Required Certification

0 Overdue Activity

QUICK LINKS

- Training Transcript
- Training Schedule
- Training Analysis

MY LEARNING ASSIGNMENTS

ONLINE COURSE

eMoney for Dummies

Due: 06/26/2021

REGISTER

ILT COURSE

Communicating With Impact

RECOMMENDED

VIEW DETAILS

ONLINE COURSE

Outbound Call Recording Policy

RECOMMENDED

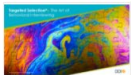
START

AVAILABLE ACTIVITIES CALENDAR

MAY 2021

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 25  | 26  | 27  | 28  | 29  | 30  | 1   |
| 2   | 3   | 4   | 5   | 6   | 7   | 8   |
| 9   | 10  | 11  | 12  | 13  | 14  | 15  |
| 16  | 17  | 18  | 19  | 20  | 21  | 22  |
| 23  | 24  | 25  | 26  | 27  | 28  | 29  |

Thursday, May 27, 2021



The Art of Behavioral Interviewing - May 27th, 2021

1:00 pm EDT -4:30 pm EDT

## My Learning Assignments

This widget allows you to view any outstanding assigned learning activities. Activities can be assigned to you automatically based on employment criteria or by your manager. This widget displays up to 20 incomplete assignments. You can quickly see whether the activity is "Required" (mandatory) or "Recommended" (optional) and the **Due** date when you need to complete it. You have the option to click the tile to view the details or you can register and start the activity using the links provided.

### MY LEARNING ASSIGNMENTS

[View all >](#)

|                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <p>ONLINE COURSE  </p> <p><b>eMoney for Dummies</b></p> <p><b>REQUIRED</b></p> <p>Due: 06/26/2021</p> <p><a href="#">REGISTER</a></p> |  <p>ILT COURSE  </p> <p><b>Communicating With Impact</b></p> <p><b>RECOMMENDED</b></p> <p><a href="#">VIEW DETAILS</a></p> |  <p>ONLINE COURSE  </p> <p><b>Outbound Call Recording Policy</b></p> <p><b>RECOMMENDED</b></p> <p><a href="#">START</a></p> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## My Pending Actions

The My Pending Actions banner categorizes all of your learning activities with a count number and provides access to the learning assignments in the timeline by clicking on the desired tile. Categories include Total Incomplete Activities, Upcoming Activities and Ongoing Activities, Overdue Activity, and Pending Activity Evaluation. Clicking on the selected tile will open the timeline to the tab displaying the designated activity category where you can view the details, register for and start the activity.

### MY PENDING ACTIONS

|    |                             |   |                   |   |                    |   |                  |   |                             |
|----|-----------------------------|---|-------------------|---|--------------------|---|------------------|---|-----------------------------|
| 10 | Total Incomplete Activities | 0 | Upcoming Activity | 9 | Ongoing Activities | 0 | Overdue Activity | 0 | Pending Activity Evaluation |
|----|-----------------------------|---|-------------------|---|--------------------|---|------------------|---|-----------------------------|

## Quick Links

The quick links section provides easy access to commonly used tools and resources like your training transcript.

### QUICK LINKS

[Training Transcript](#)
[Training Schedule](#)
[Training Analysis](#)

## Available Activities Calendar

You can also view upcoming trainings in the activity calendar by clicking on a date with a blue circle. Clicking the kebab (three vertical dots) provides direct access to the activity. You can register for the activity or start and cancel an activity you are registered for.

**AVAILABLE ACTIVITIES CALENDAR**

⚙️ < MAY 2021 > [VIEW ALL](#) Thursday, May 27, 2021

| Sun | Mon | Tue | Wed | Thu    | Fri    | Sat |
|-----|-----|-----|-----|--------|--------|-----|
| 25  | 26  | 27  | 28  | 29     | 30     | 1   |
| 2   | 3   | 4   | 5   | 6      | 7      | 8   |
| 9   | 10  | 11  | 12  | 13     | 14     | 15  |
| 16  | 17  | 18  | 19  | 20     | 21     | 22  |
| 23  | 24  | 25  | 26  | 27 (1) | 28 (1) | 29  |

**The Art of Behavioral Interviewing - May 27th, 2021**  
1:00 pm EDT - 4:30 pm EDT

- Register
- View Details
- Add To Playlist
- Add To Development Plan

## Navigation

There are two primary navigational components in DIG. At the top of the interface, you'll find the **Header Menu** and on the left-hand side of the screen a **Control Panel** is displayed.

**DIG** SELF ▾ MY TEAM ▾ ADMINISTRATION ▾

Home  
Timeline  
Library  
Learner Dashboard  
Workspaces

**MY PENDING ACTIONS**

|    |                             |   |                   |    |                    |   |                  |
|----|-----------------------------|---|-------------------|----|--------------------|---|------------------|
| 12 | Total Incomplete Activities | 0 | Upcoming Activity | 10 | Ongoing Activities | 0 | Overdue Activity |
|----|-----------------------------|---|-------------------|----|--------------------|---|------------------|

## Header Menu

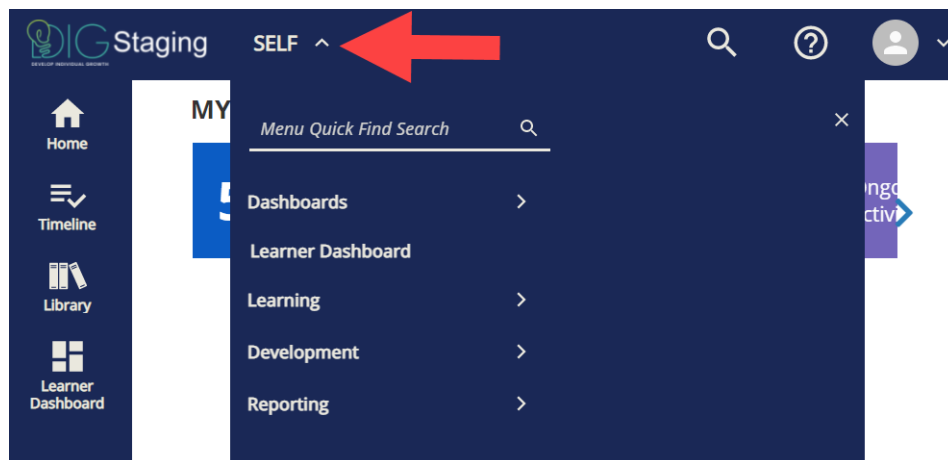
You can use this menu to find your way around the application, using the following menus and icons.

- DIG Logo
- Self
- Search
- Help, and
- User Profile



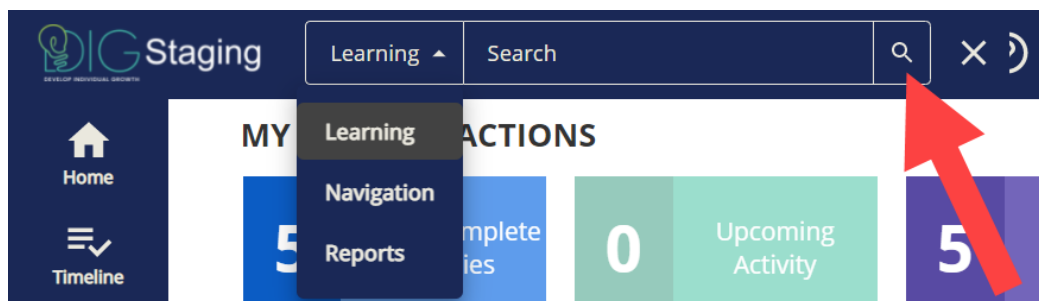
### Self

The Self Menu includes links to pages and functions related to yourself, including other Dashboards, learning plans, and more. The self-menu also provides the option to sign out.



### Search

Enterprise Search allows you to find just about anything in the system including Learning, People, and Navigation. Simply type in some key words and press enter.



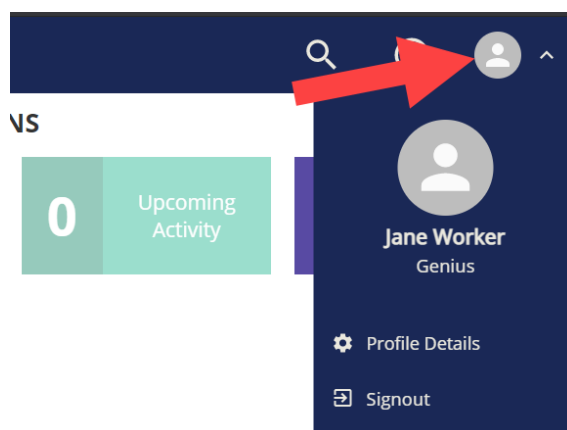
### Help

Clicking the Question mark icon will open Help in a new tab providing access to a complete and searchable online help.



### User Profile

The User Profile menu displays in a dropdown slider, exposing the profile picture, the name and job title of the logged in user, a Profile Details link and a Signout link. Clicking profile details provides access to add or edit the user photo. **As a best practice it is recommended that users click the Signout link at the end of each DIG session.**

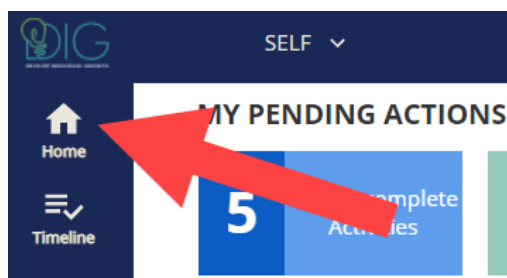


### Control Panel

The Control Panel is a left-navigation panel that allows navigation to the Home page, access to the Timeline, the Library, and the Administrator Workspace, Learner Dashboard, and My Team

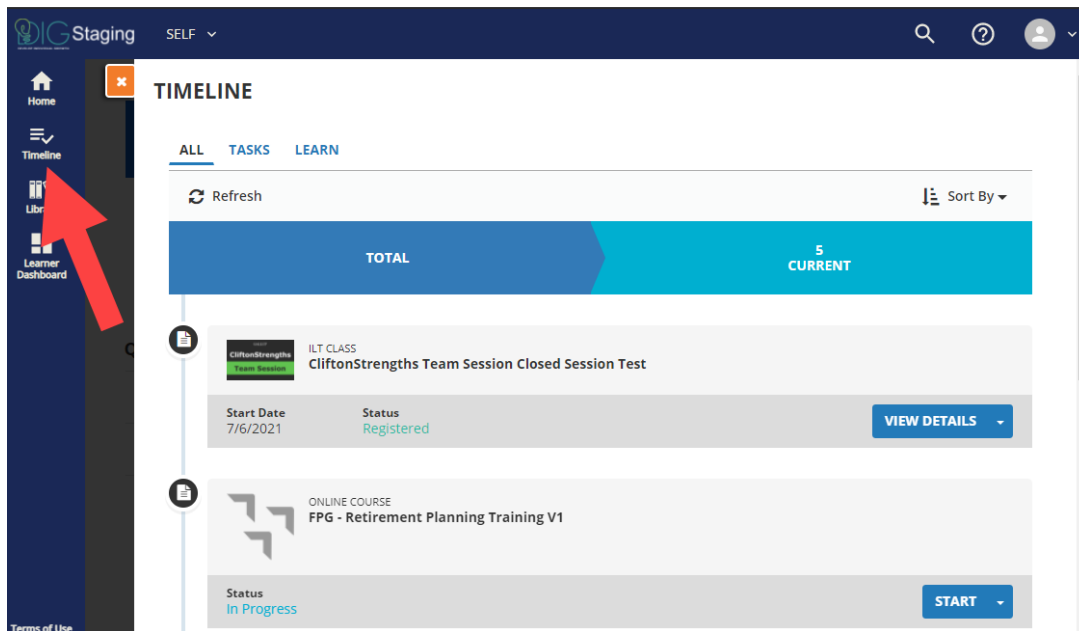
### Home

Clicking the Home icon will display the user's dashboard. Clicking the DIG logo will also display the dashboard.



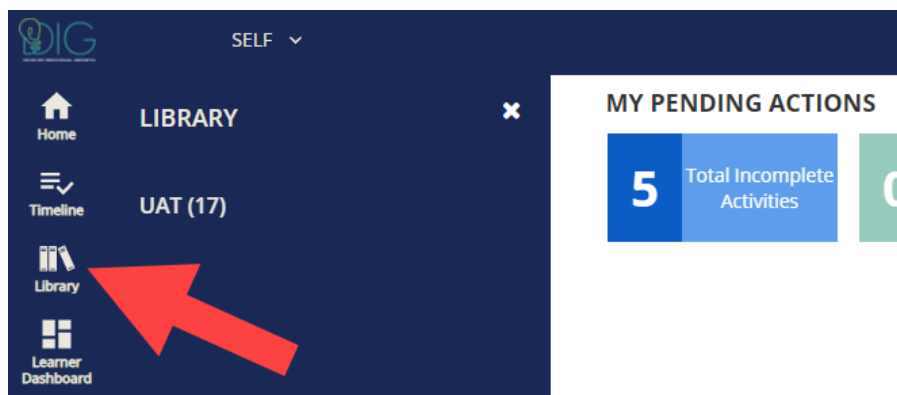
### Timeline

The Timeline is where you can find all current and upcoming assigned tasks. From the timeline you can view the details, register, and start activities.



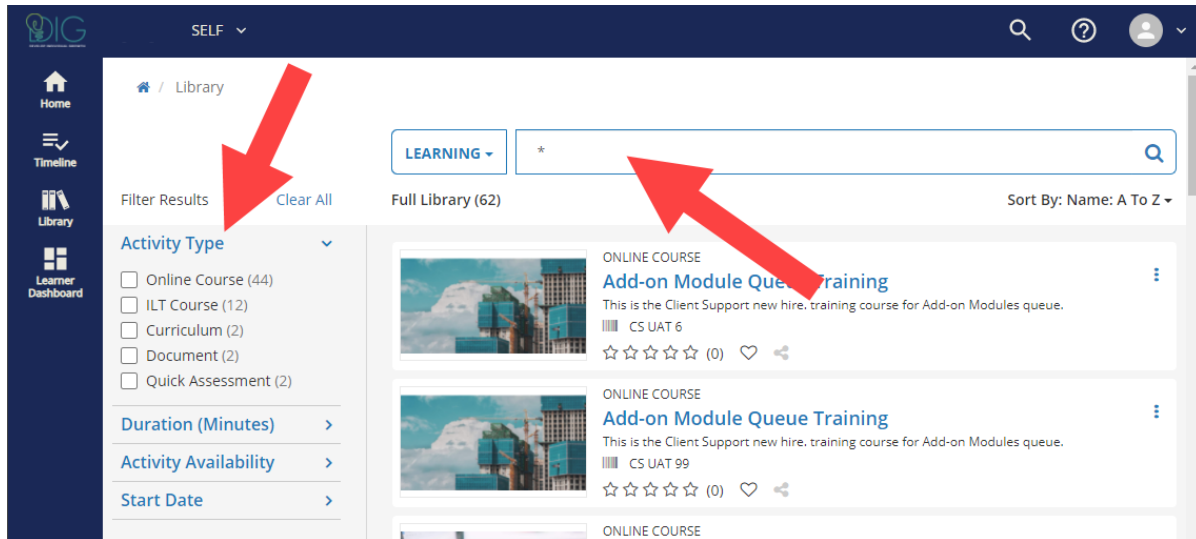
### Library

The Library allows you to search and browse the learning content library. Click Library to open the full library or select a category from the slide out menu.





Click the white X to close the slide out menu to display the full library and available filters. You can find learning content by typing keywords into the search bar.



You will find additional instructions for using the library later in this user guide.

## Complete Assigned Training

Typically, DIG lets you know you have a task assigned by sending you an email. This email may come when the task is first 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 task you need to complete. If this is the case, simply click the link in the email and you will be navigated to the activity where you can register and start the activity.

Learning activities have been changed



no-reply@emoneyadvisor.com  
To Douglas Cooper

Reply Reply All Forward ...

Mon 5/17/2021 9:55 AM

**Warning:** External email; exercise caution before clicking links, opening attachments or responding.

Please do not reply to this message. It comes from an address used to automate notices. Incoming emails cannot be accepted or monitored.

The following activities were modified:

Activity name: Communicating With Impact May 28th 2021

Start date: 5/28/2021 1:00:00 PM UTC

End date: 5/28/2021 4:00:00 PM UTC

Activity owner: Douglas Cooper

For more information about this activity, click the following link:

[https://EMONEYADVISOR.stage.sumtotal.host/core/pillarRedirect?relyingParty=LM&lang=en-us&url=app/management/LMS\\_ActDetails.aspx?ActivityId=589&UserMode=0](https://EMONEYADVISOR.stage.sumtotal.host/core/pillarRedirect?relyingParty=LM&lang=en-us&url=app/management/LMS_ActDetails.aspx?ActivityId=589&UserMode=0)

All of your assigned trainings can be accessed directly in DIG from your dashboard. You can access your training through the Timeline, My Pending Actions, and in My Learning Assignments. For example from My Learning Assignments you can begin an assignment by clicking the 'Register' link for the desired assignment.

### MY LEARNING ASSIGNMENTS

[View all >](#)



ONLINE COURSE

**eMoney for Dummies**

REQUIRED

Due: 06/26/2021

[REGISTER](#)

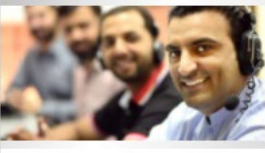


ILT COURSE

**Communicating With Impact**

RECOMMENDED

[VIEW DETAILS](#)



ONLINE COURSE

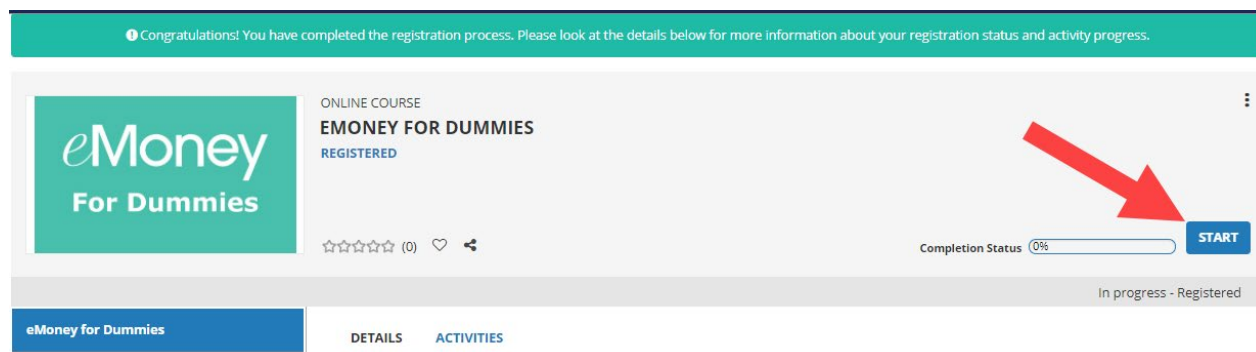
**Outbound Call Recording Policy**

RECOMMENDED

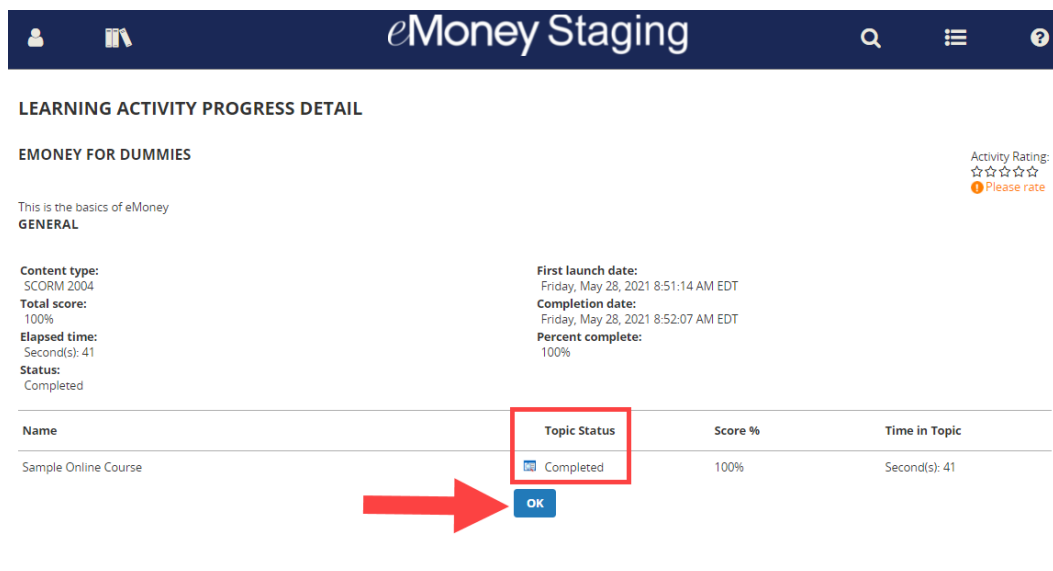
[START](#)



A message will be displayed that you have successfully registered for the course. Click the <Start> button to launch the course. Follow the prompts to complete the course. You will be able to stop and restart the course as needed. DIG will track your progress and you can pick up where you left off by simply relaunching the course from the dashboard.



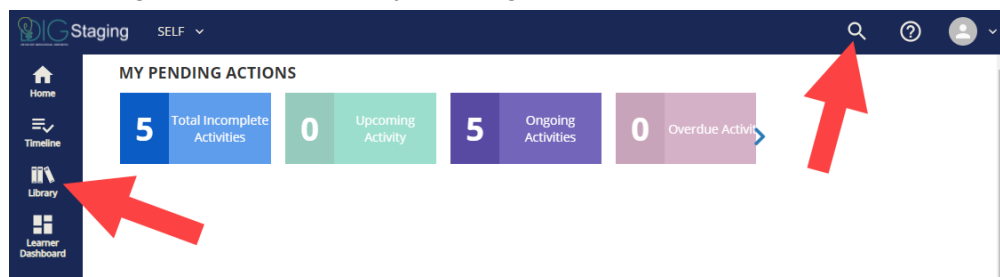
After you complete the activity click exit course and close the tab. The learning activity progress detail screen will display showing the topic status as Completed. Click OK to return to the dashboard.



The assignment will be removed from your learning assignments and be marked as satisfied.

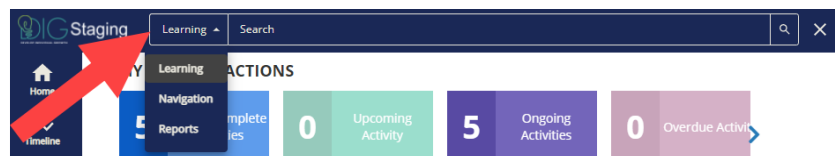
## Search and Register for Training

You can search for learning in either the Library or using the Search feature.

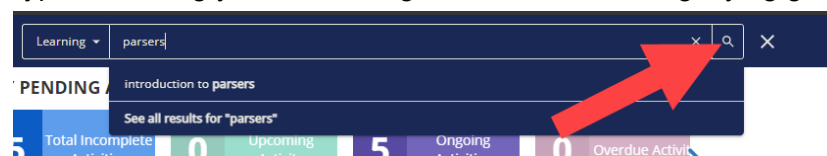


### Search

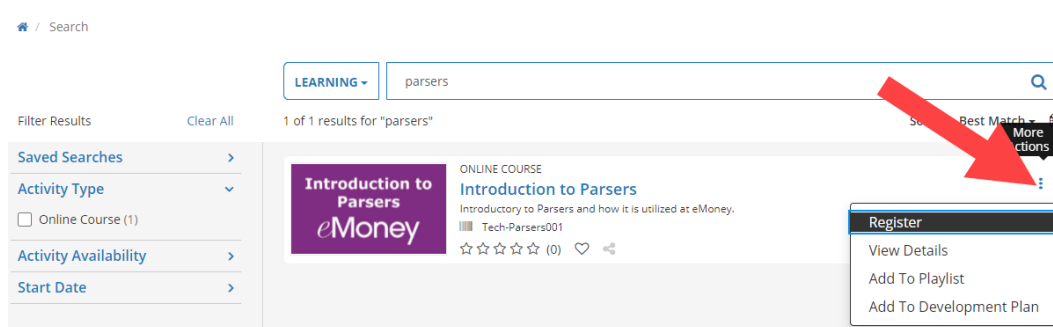
To search for learning activities using enterprise search click on the magnifying glass icon in the header. The search bar will open defaulting to the Learning Search Type. In addition to learning activities and resources you can also search for Navigation and Reports by clicking on the drop down menu to the right of the search criteria entry box.



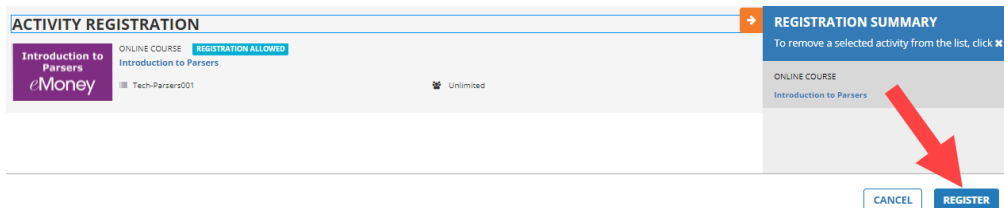
Enter key words for the type of training you are looking for and click the magnifying glass icon.



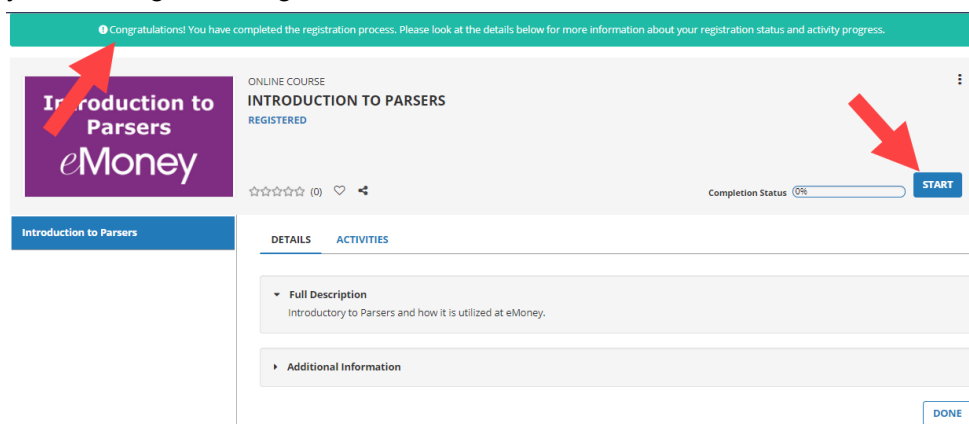
The search results will display showing the titles and activity type for trainings that match the search criteria. Click on the kebab menu represented by three vertical dots to display additional options. The options to Register, View Details, Add to Playlist, and Add to Development plan are displayed. Click the **register** option to take, enroll or access the learning activity.



The activity registration page will be displayed showing that the registration is allowed. Click the <Register> button to complete the process.

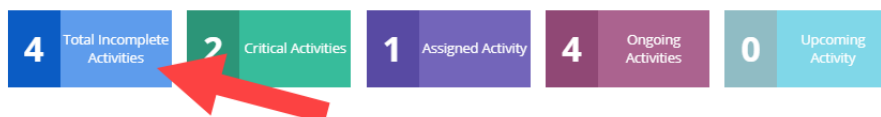
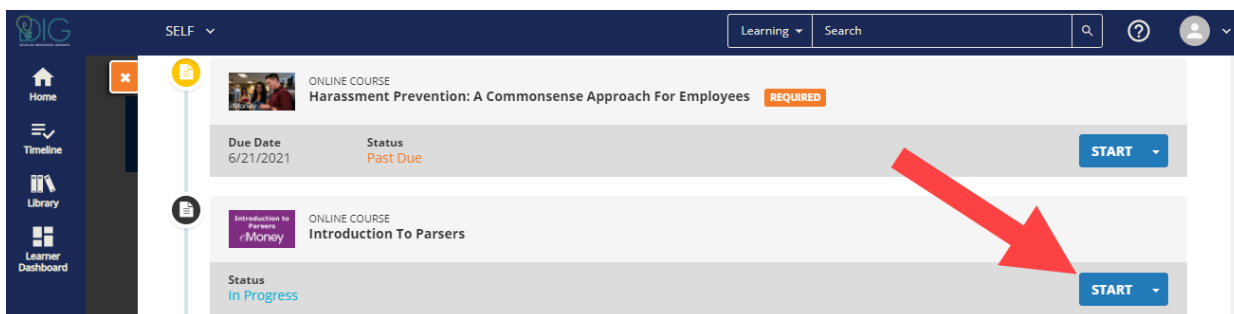


A message will be displayed that the registration was successful, and if the activity is self-paced/on demand you can begin clicking the <Start> button.



You may also access the course later under Total Incomplete Activities in My Pending Actions or from the Timeline.

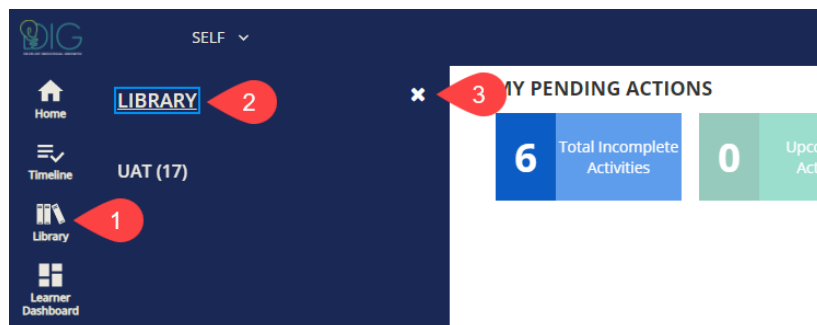
#### MY PENDING ACTIONS

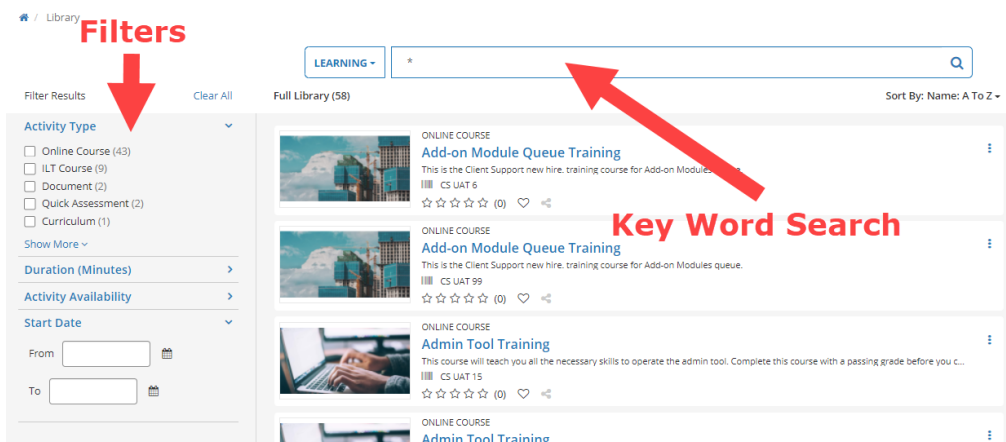
## Library

You may also search and register for training activities in the Library.

1. Click the Library icon in the header.
2. Click LIBRARY in the slide out menu
3. Click the white X to close the slide out menu to display the Library filters.



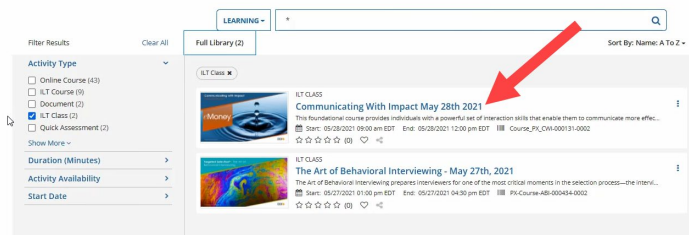
The Full Library will be displayed. You can search for content using the key word search or you can begin by filtering the result by activity type. For instructor led training you can filter by start date.



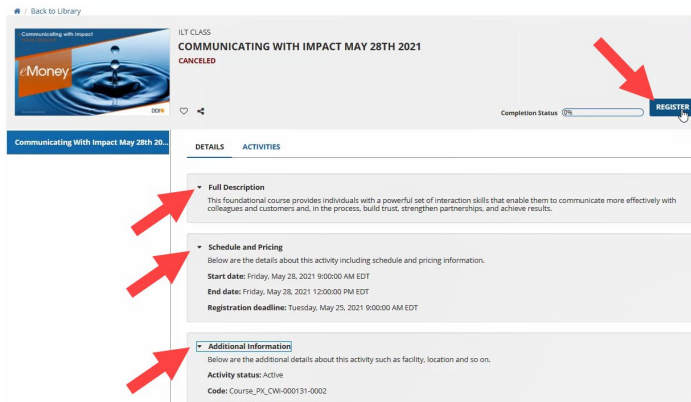
### Search Tips:

- Search is not case-sensitive. For example, if you search for "product training" or "Product Training," you will get the same results.
- If you use a space between words, the results include all records that contain both search words.
- You can use an asterisk (\*) as a wild card character to substitute for zero or more characters.
- Search ignores punctuation marks and common short words when used as search criteria. Examples of common short words include: "and," "or," "the," "as," "after," and "much."

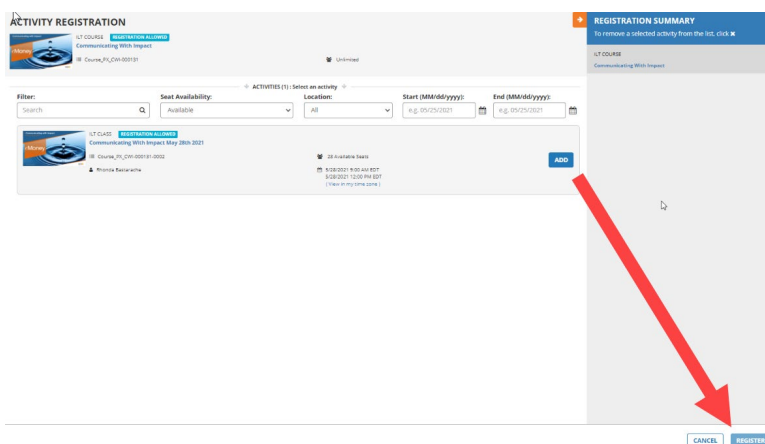
For example, to view only upcoming Instructor Led Courses you would click on the ILT Class check box to view the upcoming classes in the Library. The dates and times of the classes are displayed. Click on the class title to view additional details.



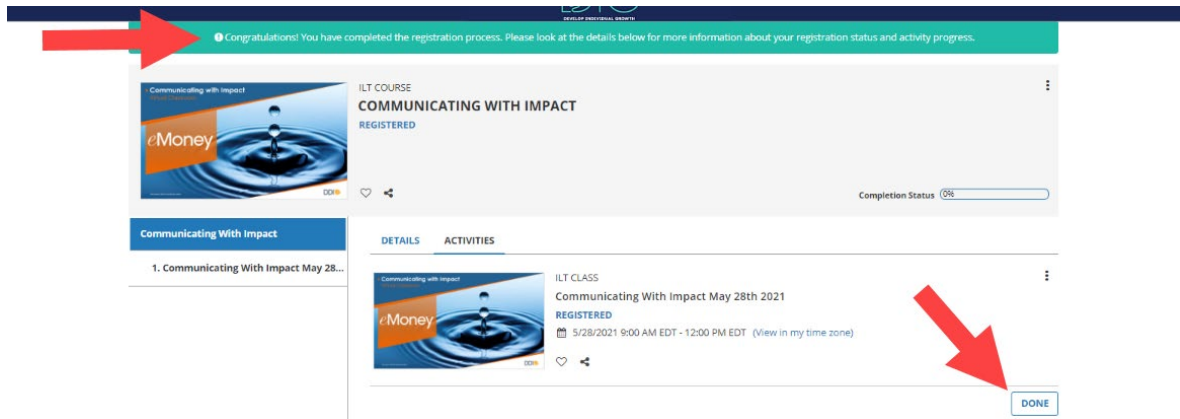
The full description is displayed. You may also view the schedule and registration deadline by clicking on Schedule and Pricing. The Additional Information section provides the instructors name and contact information for the class. Click the <Register> button to enroll.



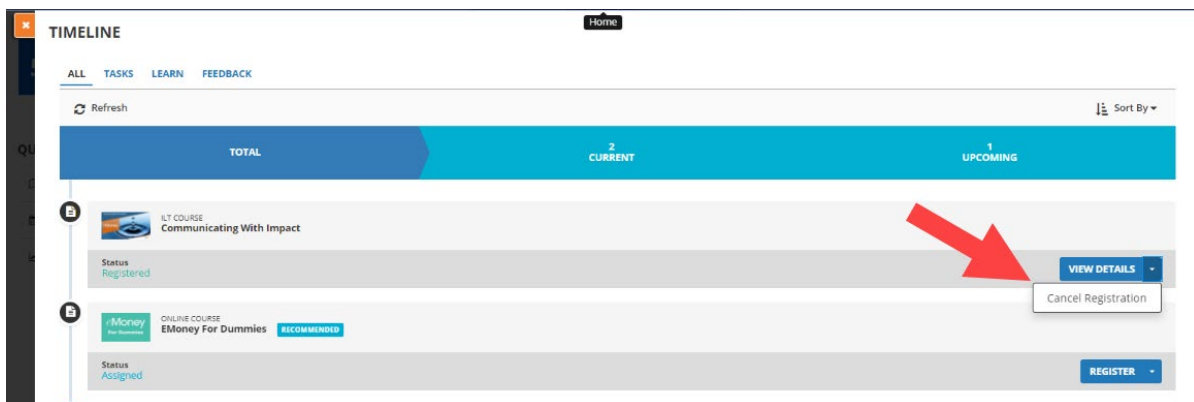
The Activity Registration screen will display showing the course and upcoming classes. Click the <Add> button for the desired class. Then, click the <Register> button.



A congratulations message will be displayed. Click the <Done> button. The ILT Class screen will display showing you as registered.



Upcoming instructor led activities can be accessed from the timeline. You can cancel the registration using the drop-down menu and this is where you can join the virtual session on the date and time of the class. Joining the session is covered in the next section of this user guide.





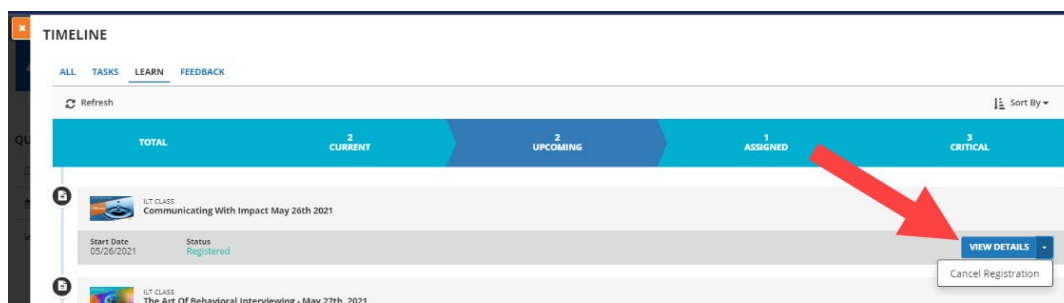
## Login to a Virtual Instructor Led Training (VILT)

After registering for a virtual class, the session will appear in your timeline. You can view upcoming activities in the timeline using the “Upcoming Activity” tile.

### MY PENDING ACTIONS



The only options will be to view the details and using the drop-down arrow to cancel your registration prior to the date and time of the training session.

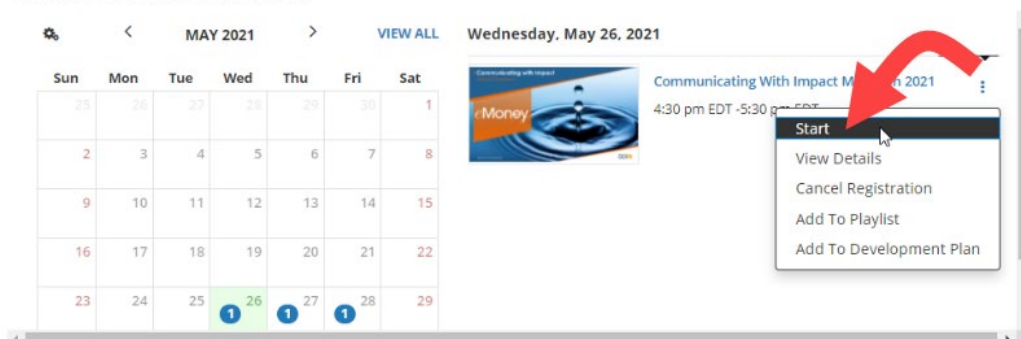


15 minutes prior the activity start time the option to Start the activity will also be displayed. Click <START> and follow the prompts to enter the Zoom session.

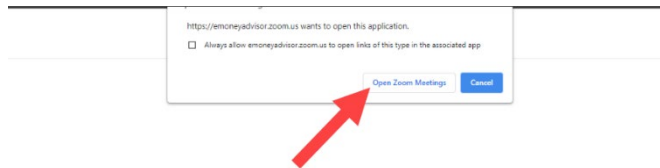


You may also start the activity from the Available Activities Calendar from the dashboard.

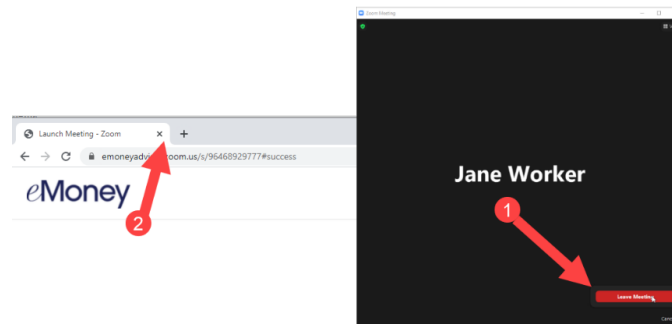
### AVAILABLE ACTIVITIES CALENDAR



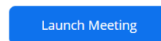
After clicking Start follow the prompts to enter the Zoom session. Click <Open Zoom Meetings>.



**IMPORTANT:** At the conclusion of the class after you leave the meeting be sure to close the browser tab that launched the meeting.



Click **Open Zoom Meetings** on the dialog shown by your browser  
If you don't see a dialog, click **Launch Meeting** below



You will be returned to DIG and asked if you have completed the activity. Click <YES>.



The learning activity progress detail screen is displayed showing the activity status as Completed. Click <OK>.

#### COMMUNICATING WITH IMPACT MAY 26TH 2021

This foundational course provides individuals with a powerful set of interaction skills that enable them to communicate more effectively with colleagues and customers and, in the process, build trust, strengthen partnerships, and achieve results.

##### GENERAL

Content type:  
Zoom  
Total score:  
N/A  
Elapsed time:  
Minute(s): 1, Second(s): 6

##### LESSON

First launch date:  
Wednesday, May 26, 2021 4:16:53 PM EDT  
Completion date:  
Wednesday, May 26, 2021 4:17:58 PM EDT

Status:  
Completed



## Manager Overview

As a manager in DIG, you can view, track, and manage the training assigned to your direct reports. This section will provide an overview of working as a manager in DIG. You will learn how to:

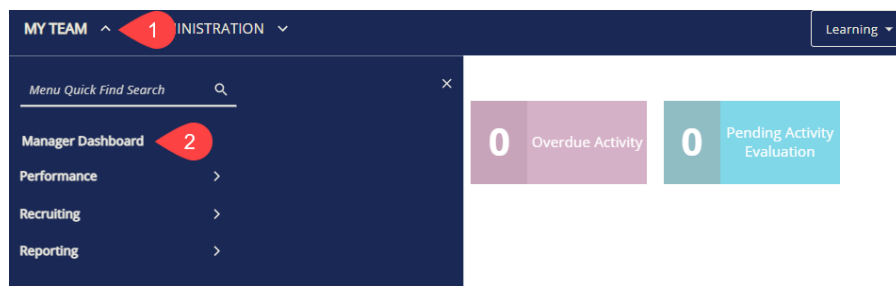
- View your team
- Assign Training, and
- Emulate a learner

### View Your Team

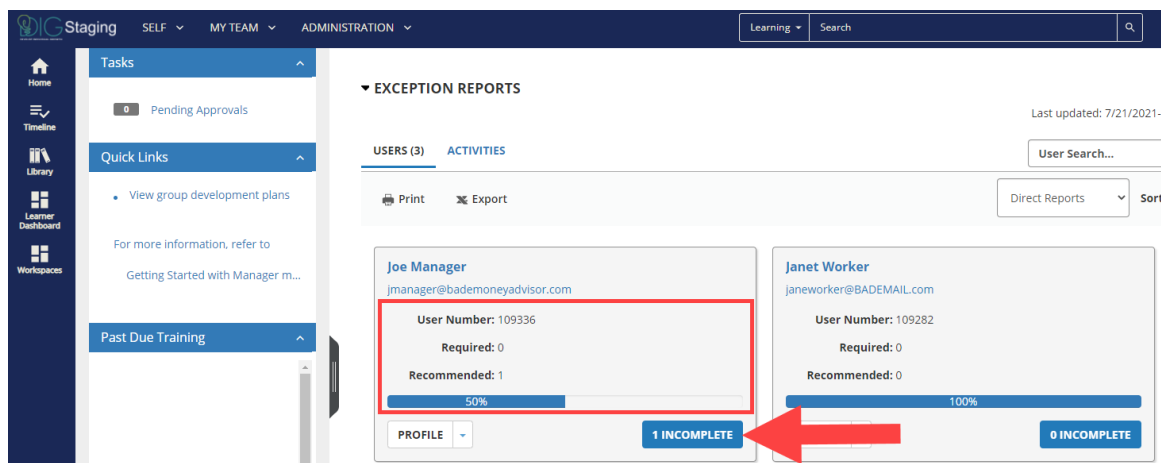
You can view and manage training assignments all from one place: the Manager Dashboard.

In the Header menu:

1. Click the My Team drop down menu.
2. Then click MANAGER DASHBOARD



The Manager Dashboard is displayed showing your Direct Reports. Each tile shows the number of assignments categorized as Required or Recommended as well as the percentage of training completed. To view the training assignments for a learner, click on the INCOMPLETE Button.





The detailed exception report by user is displayed showing a list of assigned activities. By default, the report shows current assignments. You can view all assignments by clicking the “Show all assignments” link. You also have the option to filter by Assignment Status and Assignment Type. The report displays the activity name, assignment type, assignment date, due date, and progress.

**DETAILED EXCEPTION REPORT BY USER** eMoney Employee  
List of activities assigned to this user.

Overall progress  
30%

Search

Current Assignments  Last Processed: Friday, May 28, 2021 2:11:49 AM EDT  
Displaying 7 of 7 Records

Show all assignments (10)

Filter by:

Assignment Status  
Assigned (7)  
Waived (3)  
Incomplete (7)

Assignment Type  
Recommended (10)

Assignment By  
Others (10)

| Activity Name                                                 | Assignment Type | Priority | Assignment Status | Assignment Date | Due date  | Expiration Date | Progress |
|---------------------------------------------------------------|-----------------|----------|-------------------|-----------------|-----------|-----------------|----------|
| <input type="radio"/> FPG - Insurance and Annuities V1        | Recommended     |          | Assigned          | 5/21/2021       |           |                 | 0%       |
| <input type="radio"/> FPG - Investments and Monte Carlo V1    | Recommended     |          | Assigned          | 5/21/2021       |           |                 | 0%       |
| <input type="radio"/> FPG - Planning Training V1              | Recommended     |          | Assigned          | 5/21/2021       |           |                 | 0%       |
| <input type="radio"/> FPG - Retirement Planning Training V1   | Recommended     |          | Assigned          | 5/21/2021       |           |                 | 0%       |
| <input type="radio"/> FPG - Stock Options Training V1         | Recommended     |          | Assigned          | 5/21/2021       |           |                 | 0%       |
| <input type="radio"/> FPG Fundamentals Training V1            | Recommended     |          | Assigned          | 5/21/2021       |           |                 | 0%       |
| <input type="radio"/> New Hire Benefits Orientation 2020-2021 | Recommended     |          | Assigned          | 5/21/2021       | 6/20/2021 |                 | 0%       |

CLOSE

## Assign Training

To assign a new activity to a direct report from the Detailed Exception Report By User screen, click <Add>.

**DETAILED EXCEPTION REPORT BY USER** Jane Worker  
List of activities assigned to this user.

Overall progress  
90.9%

Search

Current Assignments  Last Processed: Friday, May 28, 2021 2:11:49 AM EDT  
Displaying 1 of 1 Records

Show all assignments (11)

Filter by:

Assignment Status

Assignment Type

Assignment By

| Activity Name                                                 | Assignment Type | Priority | Assignment Status | Assignment Date | Due date  | Expiration Date | Progress |
|---------------------------------------------------------------|-----------------|----------|-------------------|-----------------|-----------|-----------------|----------|
| <input type="radio"/> New Hire Benefits Orientation 2020-2021 | Recommended     |          | In Progress       | 5/21/2021       | 6/20/2021 |                 | 0%       |

Next, search for and select the desired learning activity. You can scroll through the pages of available activities using the page navigation buttons or you can search for the activity. Enter the desired search criteria and press enter.

**ASSIGN LEARNING ACTIVITIES TO USER** Jane Worker

Select activities to assign to this user.



☐ Name ▾

**Learning Activities (67)**

Filter by:

[Libraries](#)

[Activity Type](#)

|                          |                                                                                                                |
|--------------------------|----------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> |  Add-on Module Queue Training |
| <input type="checkbox"/> |  Add-on Module Queue Training |
| <input type="checkbox"/> |  Admin Tool Training          |
| <input type="checkbox"/> |  Admin Tool Training          |

Click on the check box for the activity or activities to be assigned and click the <NEXT> button.

**ASSIGN LEARNING ACTIVITIES TO USER** Jane Worker

Select activities to assign to this user.



☐ Name ▾

**Learning Activities (1)**

Filter by:

[Activity Type](#)

|                                     | Name                                                                                                        | Status       |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------|--------------|
| <input checked="" type="checkbox"/> |  Introduction to Parsers | Not Assigned |

Records 1-1 of 1

Page 1 of 1

Selected Activities (1)

1. Click the radio button for either Required or Recommended to the type of assignment.
2. As desired enter a start date and a due date for the assignment
3. Click the <APPLY TO SELECTION> button, and
4. Click <Done>

**Assignment Options:**  
Selected Activities (1)

**Type:**  
☐ Required  
☒ Recommended

☐ Ignore Previous Completions

**Start Date:**  
☒ Today  
☐  Days from today  
☐ On

**Time zone:**  
UTC

**Priority:**  
None

**Due Date:**  
☒ No Due Date  
☐ Within  Day(s)  
☐ By

**Time zone:**  
UTC

**Assignment Notes:**

**Status:**  
Assigned

**APPLY TO SELECTION**

**CANCEL** **BACK** **DONE**

The selected training is assigned and will appear on the user's dashboard.



You may also edit an assignment for your direct reports by selecting the assignment and then clicking <Edit Assignment>.

**DETAILED EXCEPTION REPORT BY USER** Jane Worker  
List of activities assigned to this user.

Overall progress: 83.3%

Search [ ] Q

Current Assignments Last Processed: Friday, May 28, 2021 2:11:49 AM EDT  
Displaying 2 of 2 Records

Show all assignments (12)

Filter by:

- Assignment Status
- Assignment Type
- Assignment By

Refresh + Add **Edit Assignment** Remove Assignment

Print Export

| Activity Name                                                 | Assignment Type | Priority | Assignment Status | Assignment Date | Due date  | Expiration Date | Progress |
|---------------------------------------------------------------|-----------------|----------|-------------------|-----------------|-----------|-----------------|----------|
| <input checked="" type="radio"/> Introduction to Parsers      | Recommended     |          | In Progress       | 5/28/2021       |           |                 | 0%       |
| <input type="radio"/> New Hire Benefits Orientation 2020-2021 | Recommended     |          | In Progress       | 5/21/2021       | 6/20/2021 |                 | 0%       |

CLOSE

You can change the assignment type, add or modify the start and due dates, add notes or change the Status. When the desired edits are entered click <DONE>.

**EDIT ASSIGNMENT FOR** Jane Worker  
Learning Activity Name: Introduction to Parsers

Assignment Options:

Type:  
☒ Required  
☐ Recommended

☐ Ignore Previous Completions

Start Date:  
☐ Today  
☐ [ ] Days from today  
☒ On 5/28/2021  
Time zone: UTC

Priority: None

Due Date:  
☐ No Due Date  
☒ Within 30 Days(s)  
☐ By [ ]  
Time zone: UTC

Assignment Notes:

Status: Assigned

CANCEL DONE

To remove an assignment, click the radio button for the training to select it then click <Remove Assignment> and then <OK>.

**DETAILED EXCEPTION REPORT BY USER** Jane Worker  
List of activities assigned to this user.

Overall progress: 83.3%

Search [ ] Q

Current Assignments Last Processed: Friday, May 28, 2021 2:11:49 AM EDT  
Displaying 2 of 2 Records

Show all assignments (12)

Filter by:

- Assignment Status
- Assignment Type
- Assignment By

Refresh + Add **Edit Assignment** **Remove Assignment**

Print Export

| Activity Name                                                 | Assignment Type | Priority | Assignment Status | Assignment Date | Due date  | Expiration Date | Progress |
|---------------------------------------------------------------|-----------------|----------|-------------------|-----------------|-----------|-----------------|----------|
| <input checked="" type="radio"/> Introduction to Parsers      | Required        |          | In Progress       | 5/28/2021       | 6/27/2021 |                 | 0%       |
| <input type="radio"/> New Hire Benefits Orientation 2020-2021 | Recommended     |          | In Progress       | 5/21/2021       | 6/20/2021 |                 | 0%       |

CLOSE

**WARNING**

Are you sure you want to remove the selected activity?

OK CANCEL

A message will display confirming that the activity was successfully removed. Click <CLOSE> to return to the Manager Dashboard.

You have successfully removed the assignment. ✕

### DETAILED EXCEPTION REPORT BY USER Jane Worker

List of activities assigned to this user.

Current Assignments

Last Processed: Friday, May 28, 2021 2:11:49 AM EDT

Displaying 1 of 1 Records

Show all assignments (11)  
 Filter by:

Refresh

Add

Print

Export

| Assignment Status                                                                          | Activity Name | Assignment Type | Priority  | Assignment Status | Assignment Date | Due date                                                 | Expiration Date | Progress |
|--------------------------------------------------------------------------------------------|---------------|-----------------|-----------|-------------------|-----------------|----------------------------------------------------------|-----------------|----------|
| <div> <input type="radio"/> New Hire Benefits Orientation 2020-2021                 </div> | Recommended   | In Progress     | 5/21/2021 | 6/20/2021         | 0%              | <div style="text-align: right;"> <div>CLOSE</div> </div> |                 |          |

## Emulate a Learner

As a manager you also have access to your direct reports profile by clicking on the <PROFILE> drop down menu. You have the option to view the users transcript, training schedule and more. Selecting an option from the profile menu will launch emulation mode where you view the system as if you were user you selected.

**eMoney Employee**  
eemployee@BADEMAILemoneyadvisor.com

User Number: 109265

Required: 0

Recommended: 30%

**PROFILE** ▾

**INCOMPLETE**

**eMoney Training**  
emoney\_training@bademallemoneyadvisor.com

User Number: 109262

Required: 1

Recommended: 77%

**PROFILE** ▾

**3 INCOMPLETE**

**Jane Worker**  
jworker2@BADEMAILemoneyadvisor.com

User Number: 109269

Required: 1

Recommended: 91%

**PROFILE** ▾

**1 INCOMPLETE**

**Joe Worker**  
jworker@BADEMAILemoneyadvisor.com

User Number: 109269

Required: 0

Recommended: 9%

**PROFILE** ▾

**10 INCOMPLETE**

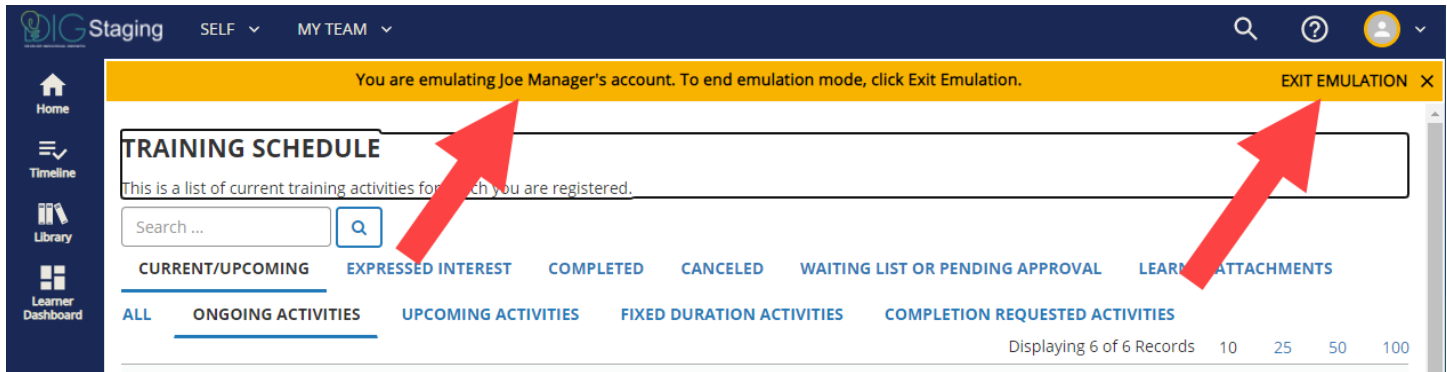
**Profile Menu Options:**

- Learner Approvals
- My Observation Checklists
- Observer Checklists
- Training Analysis
- Training Schedule
- Training Transcript

For example, selecting Training Schedule will open the selected users training schedule where you can view their current and upcoming registrations, their completed activities, and more.



In emulation mode an emulation strip at the top of the screen alerts you of the person you are emulating. You cannot hide this strip as it creates a single link with the X icon. A ring around the My Profile menu's avatar also indicates that you are in emulation mode. To exit emulation mode, click [Exit Emulation](#).



The screenshot displays the 'eMoney Staging' application interface. At the top, a dark blue header contains the 'eMoney Staging' logo, 'SELF' and 'MY TEAM' dropdown menus, and search, help, and user profile icons. A yellow banner across the top of the main content area states: 'You are emulating Joe Manager's account. To end emulation mode, click Exit Emulation.' with an 'EXIT EMULATION X' button on the right. Two red arrows point to the banner and the button. Below the banner, the 'TRAINING SCHEDULE' section is visible, featuring a search bar and a list of tabs: 'CURRENT/UPCOMING', 'EXPRESSED INTEREST', 'COMPLETED', 'CANCELED', 'WAITING LIST OR PENDING APPROVAL', and 'LEARNER ATTACHMENTS'. Underneath these are sub-tabs: 'ALL', 'ONGOING ACTIVITIES', 'UPCOMING ACTIVITIES', 'FIXED DURATION ACTIVITIES', and 'COMPLETION REQUESTED ACTIVITIES'. The bottom right corner indicates 'Displaying 6 of 6 Records' and provides pagination options: 10, 25, 50, 100.

You will be returned to your dashboard where you can navigate back to the Manager Dashboard and take additional action as desired.