

Learning Administration

Introduction to SuccessFactors
Learning



successfact❤️**rs**[™]
An SAP Company

SUCCESS ACADEMY

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Course Introduction

Learning is essential to any organization's success because it improves business results, boosts productivity, and increases organizational competitiveness. SuccessFactors Learning is a Learning Management System (LMS) that helps learning professionals track and improve employees' skills, develop leaders, reduce compliance risk, and better enable external audiences. SuccessFactors Learning also can be leveraged as a unified, key part of the SuccessFactors HCM Suite.

Through discussion, demonstration, and hands-on computer lab work, this course teaches the concepts and terminology associated with SuccessFactors Learning. You will be introduced to the searching and navigation features, the Learning Needs Management model, as well as how to work with user records using the step-by-step, hands-on lab exercises. Additionally, you will gain basic skills on how to use SuccessFactors Learning reporting features to create, run, and save reoccurring reports.

Course Objectives

Upon completion of this course, you will be able to:

- ▶ Identify features of SuccessFactors Learning
- ▶ Identify and use the search functions
- ▶ Define specific terms associated with the Learning Needs Management model
- ▶ Add, view, and modify user records
- ▶ Navigate the SuccessFactors Learning user interface

You will also be able to create, run, and save reoccurring reports (optional).

Target Audience and Agenda

This is a virtual instructor-led training course intended for all SuccessFactors Learning administrators (admins).

This course covers:

- ▶ Module 1: Administrator Access, Navigation, and Searching
- ▶ Module 2: Learning Needs Management Overview
- ▶ Module 3: Working with User Records
- ▶ Module 4: Navigating the User Interface – Overview
- ▶ Appendix A: Running, Saving, and Creating Recurring Reports
- ▶ Appendix B: QuickGuides Overview

Assumptions

The SuccessFactors Learning instance is highly configurable. During this training, you will be working in a representative environment. To properly progress through the training and when navigating the system, you must understand some assumptions.

Browser Pop-up Window

Do not block pop-up windows in your browser. Please unblock pop-up windows so that the application may function as designed.

When you first log in to SuccessFactors Learning, the following message banner may display at the top of your browser window:

Pop-up blocked. To see this pop-up or additional options, click here.

If this banner displays, perform the following steps:

1. Click the pop-up blocked message. A box displays with a few options.
2. Select the **Always allow pop-ups from this site** option and click **Yes**.
3. Once selected, you will not see the pop-up blocked warning again.

Administrator Role and Workflows

This training assumes that your SuccessFactors Learning administrator role is associated with all available workflows in the system. If your role does not include certain workflows, those tabs and pages will be grayed out and/or inaccessible.

Required Fields

Your system administrator configured specific fields throughout the system as *required* based on your organization's business rules and processes. These required fields are indicated with a red asterisk (*). You must input data in these fields before you are allowed to progress.

If you are using a SuccessFactors Learning training instance to progress through this course, the fields displayed and marked as required may not reflect the settings you will encounter when accessing your organization's instance. Your system administrator can provide you with a list of the required fields for your organization.

Using this Guide

This guide is designed to be used in conjunction with an instructor and provides general information that will be elaborated upon by the instructor.

Throughout the guide, you may encounter icons that call out various types of information. The following table illustrates how this guide uses icons to indicate different types of comments, activities, labs, etc. that support the text.



Activity: Indicates an activity for you to complete that helps reinforce the information you just learned.



Note: Indicates additional information that is related to the information presented.



Exercise: Indicates a hands-on exercise. Follow the step-by-step process outlined to perform specific tasks in the instance.



Job Aid: Indicates there is a job aid available for the task. Job aids provide detailed instructions and screen captures to help you complete a task.

Additional Resources

Help & Tutorials is a link available within Administrator Tools that contains all documentation regarding SuccessFactors administration (Figure 1).

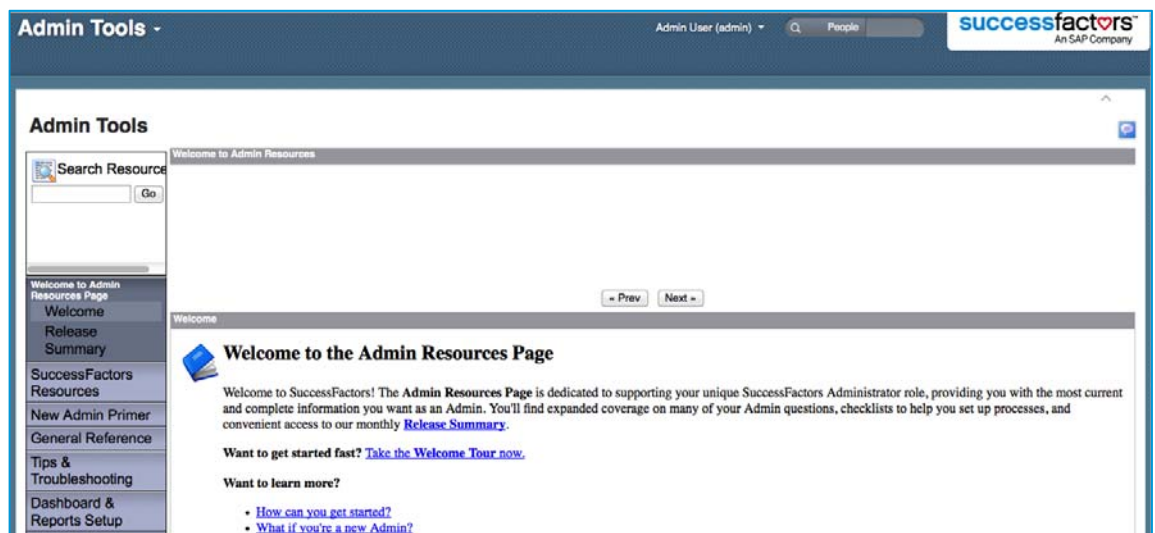


Figure 1. Admin Resources

A video is also available to help you use these resources. Click the **Take the Welcome Tour now** link to access the video.

There are a number of other resources that can provide you more information about the SuccessFactors system, including:

- ▶ SuccessFactors website: <http://www.successfactors.com>
- ▶ Task-specific job aids and reference guides
- ▶ SuccessFactors Customer Community: <http://community.successfactors.com>
- ▶ Resources tab of the SAP Jam group/Learning Room
- ▶ Elearning, video simulations, and quick reference guides

For more information about other courses and registration, contact Success Academy at SFHCMGlobalTraining@sap.com.

Module 1. Administrator Access, Navigation, and Searching

The goal of this module is to provide you with the general guidelines for accessing, navigating, and searching within SuccessFactors Learning as an administrator (admin).

Objectives

Upon completion of this module, you will be able to:

- ▶ Identify admins and users in SuccessFactors Learning
- ▶ Navigate within SuccessFactors Learning as an admin
- ▶ Use the keyword/quick command Search function
- ▶ Work with and organize bookmarks and recents
- ▶ Create search filters and search for records
- ▶ Download and view or save search results

SuccessFactors Learning

SuccessFactors Learning is a Learning Management System (LMS) designed to facilitate tracking of the comprehensive range of information that organizations need in order to manage their learning programs effectively. SuccessFactors Learning enables its administrators to make informed decisions about their user population, learning assignments, learning completions, scheduling, and resources (Figure 2).



Figure 2. SuccessFactors Learning

Accessing SuccessFactors Learning

The SuccessFactors HCM suite (formerly known as BizX) and the SuccessFactors Learning application are fully integrated into one common interface. People using the SuccessFactors Learning system will access various menu choices, tiles, and tabs depending on who they are and what responsibilities they have.

An **admin** is an administrator for SuccessFactors Learning. An admin can have many different types of responsibilities including adding or editing user records, creating learning records, assigning training, scheduling training, enrolling users, granting users credit for completing training, and running reports.

A **user** is considered the end user of SuccessFactors Learning. Users include supervisors, instructors, Human Resource Business Partners (HRBPs), and organization owners. Users may view their own training needs, register for training sessions, launch online training, self-assign learning, and run reports. Supervisors and HRBPs may view and manage the training needs of other users for whom they are responsible.

Log in to SuccessFactors Learning Administration (SuccessFactors HCM/LMS Integrated Environment)

To log in to the integrated environment (without single sign-on):

1. Enter the URL into your browser and hit your **Enter** key or click **Go**.

The SuccessFactors log in screen displays (Figure 3).

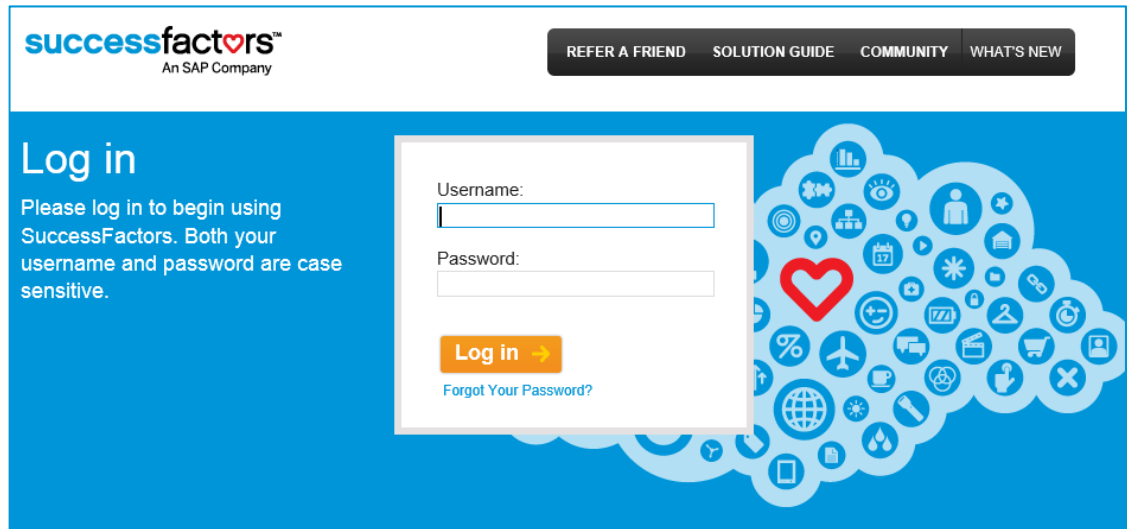


Figure 3. SuccessFactors Login Screen

2. Enter your username and password and click **Log in**.

The SuccessFactors Home page displays (Figure 4).

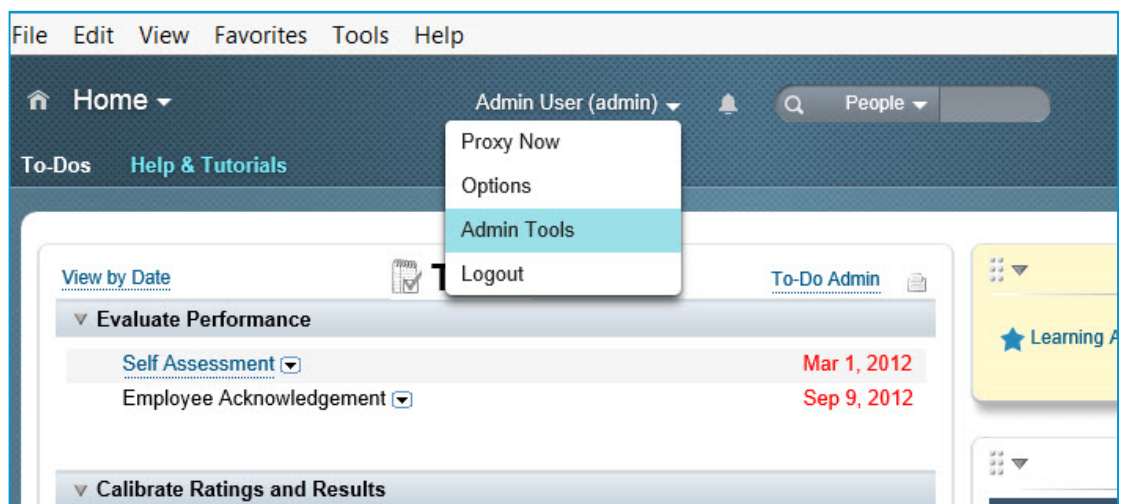


Figure 4. SuccessFactors Home Page

3. Click your name (in this case, *Admin User (admin)*) and select **Admin Tools** from the drop-down menu.

The Administration Tools page displays (Figure 5).

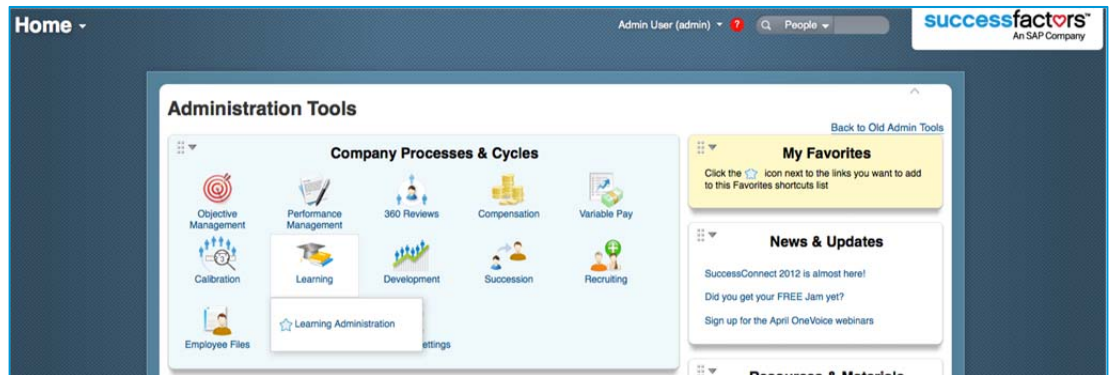


Figure 5. Administration Tools

4. Click **Learning** and select **Learning Administration**.



Note: If you receive a security warning, click **Continue**.

5. SuccessFactors Learning Administration opens (Figure 6).

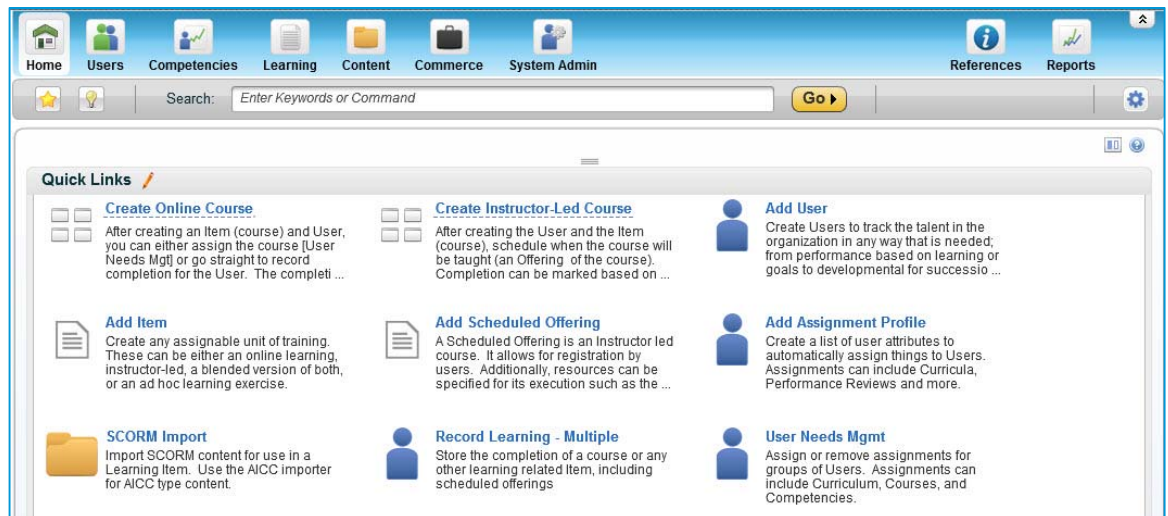


Figure 6. SuccessFactors Learning Administration

Log in to SuccessFactors Learning Administration (LMS Standalone Environment)

To log in to the standalone SuccessFactors Learning administration environment:

1. Enter the URL into your browser and hit your **Enter** key or click **Go**.

The SuccessFactors Learning login screen displays (Figure 7).

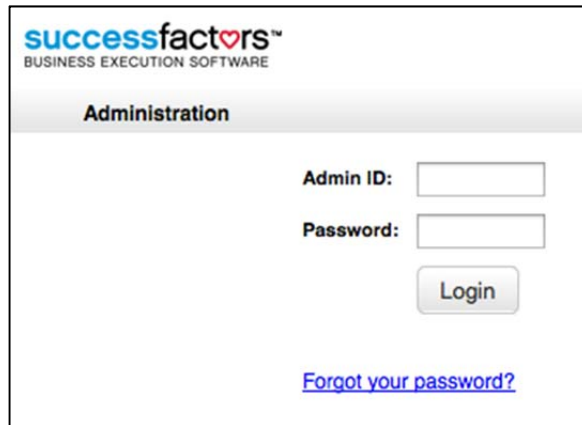


Figure 7. SuccessFactors Learning Login Screen

2. Enter your Admin ID and password and click **Login**.

The Learning Welcome screen displays (Figure 8).

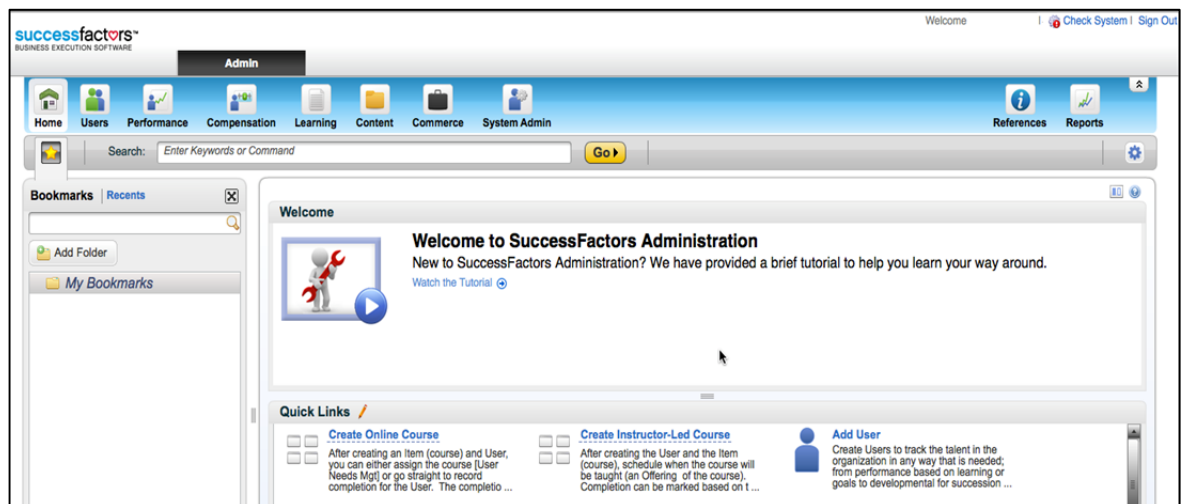



Figure 8. Learning Welcome Screen

Personalize Your Admin Experience – Configurable Home Page

In the continuing effort to provide an application that meets each administrator's unique needs, the administrator Home page is configurable, including a new page layout option. Quick Links (Figure 9) are also available from the Home page, along with a configurable Welcome area that can contain any information that needs to be imparted to administrators.

Page Layout

Admins can configure the layout for their home page using the **Choose a different layout** icon () in the upper right to rearrange the two areas, Welcome and Quick Links (Figure 9).

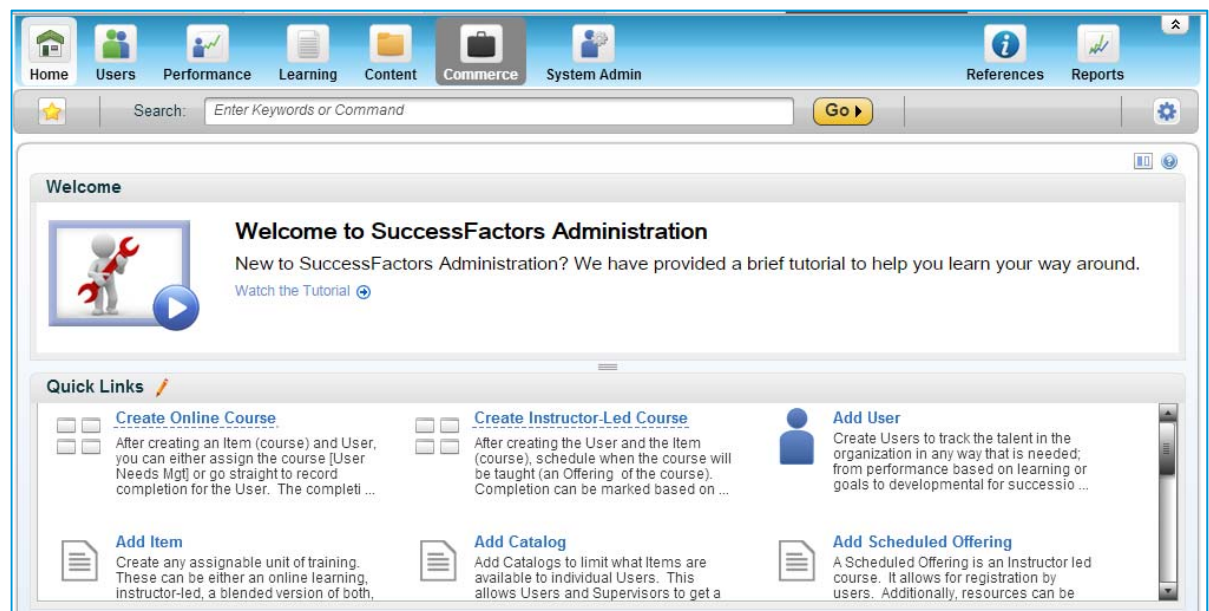


Figure 9. Admin Home Page

SuccessFactors Learning provides admins with six different layout configuration options. Additionally, the slide bar between the two areas can be moved to adjust the size of each area.

Quick Links from Home Page

Any command available from the Search textbox can be configured to display in the Quick Link area, giving quick access to whatever an admin may do most. A Quick Link Group is a set of Quick Links that are displayed and often run in sequence.

The list of Quick Links and Quick Link Groups is set globally. Admins may choose to show or hide quick links on their Home page based on what is configured and which permissions their admin role allows.

Add Item is an example of a Quick Link and *Create Instructor-Led Course* is an example of a Quick Link group that has been created (Figure 10).

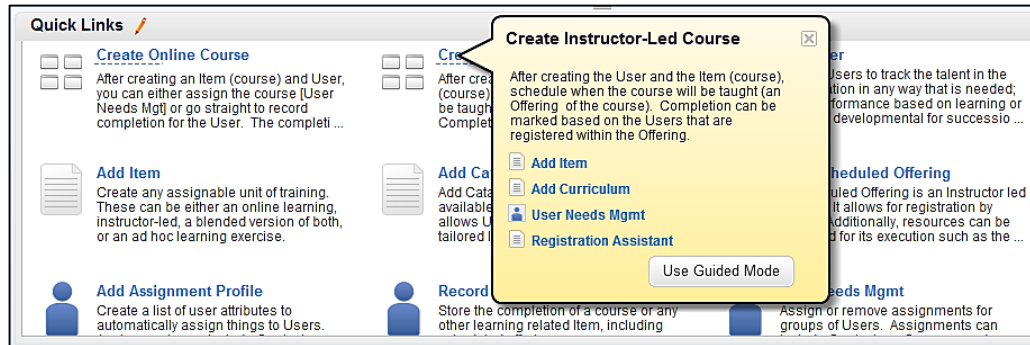



Figure 10. Quick Link Group

Using the Manage Quick Links feature (**Home Page > Quick Links > edit icon** ()), admins can select from a list of *Available* commands and add them to the list of *Selected* commands (Figure 11).

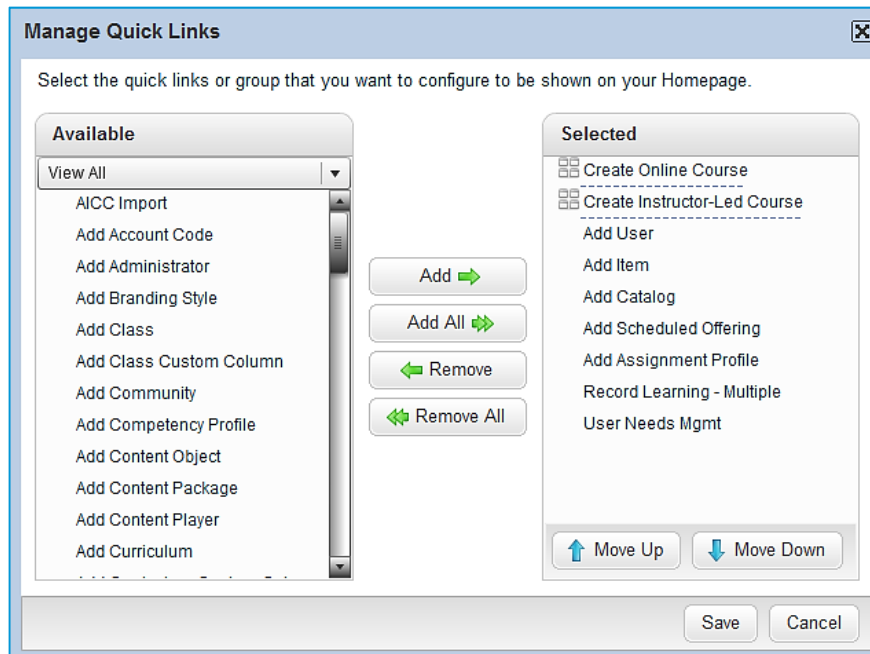


Figure 11. Managing Quick Links

Guided Mode

The admin can click **Guide Me** (💡) on a Quick Link Group and access that process from anywhere within the application (Figure 13). This allows the process to follow the admin and will only display once a guided mode has been initiated. Guided mode will advance to each Quick Link in the group in sequence.



Figure 12. Guide Me icon

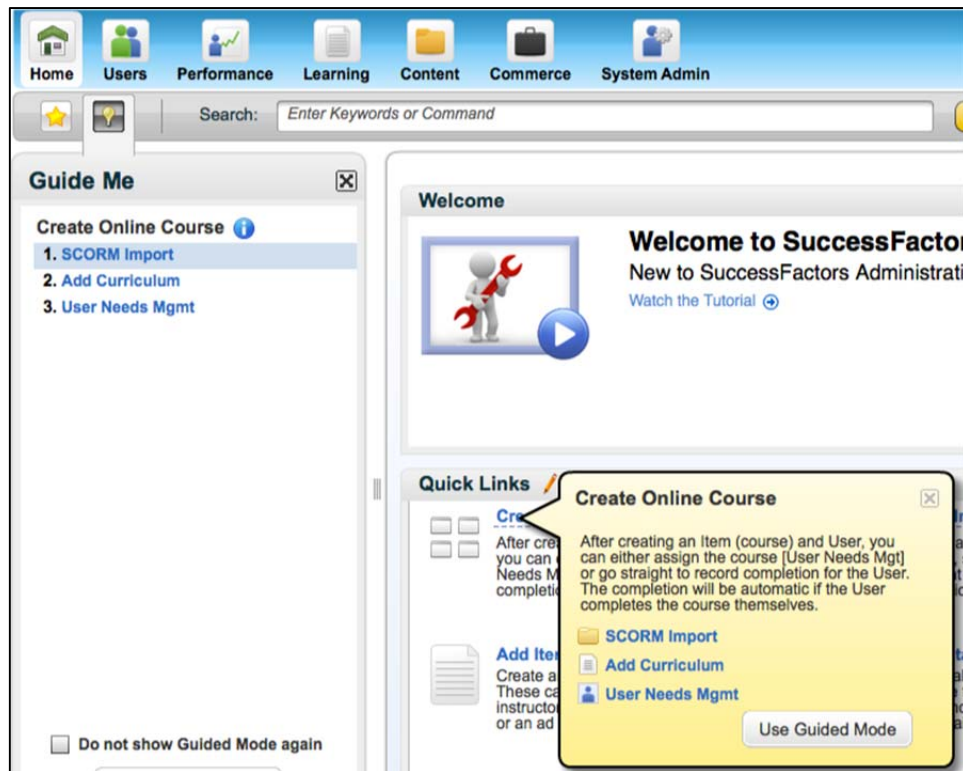


Figure 13. Example of Guide Me Mode

Administrator (Admin) Screen Layout

There are four main sections of the admin screen (Figure 14):

- ▶ Top menu frame
- ▶ Left menu frame
- ▶ Content frame
- ▶ Bookmarks and Recents Panel

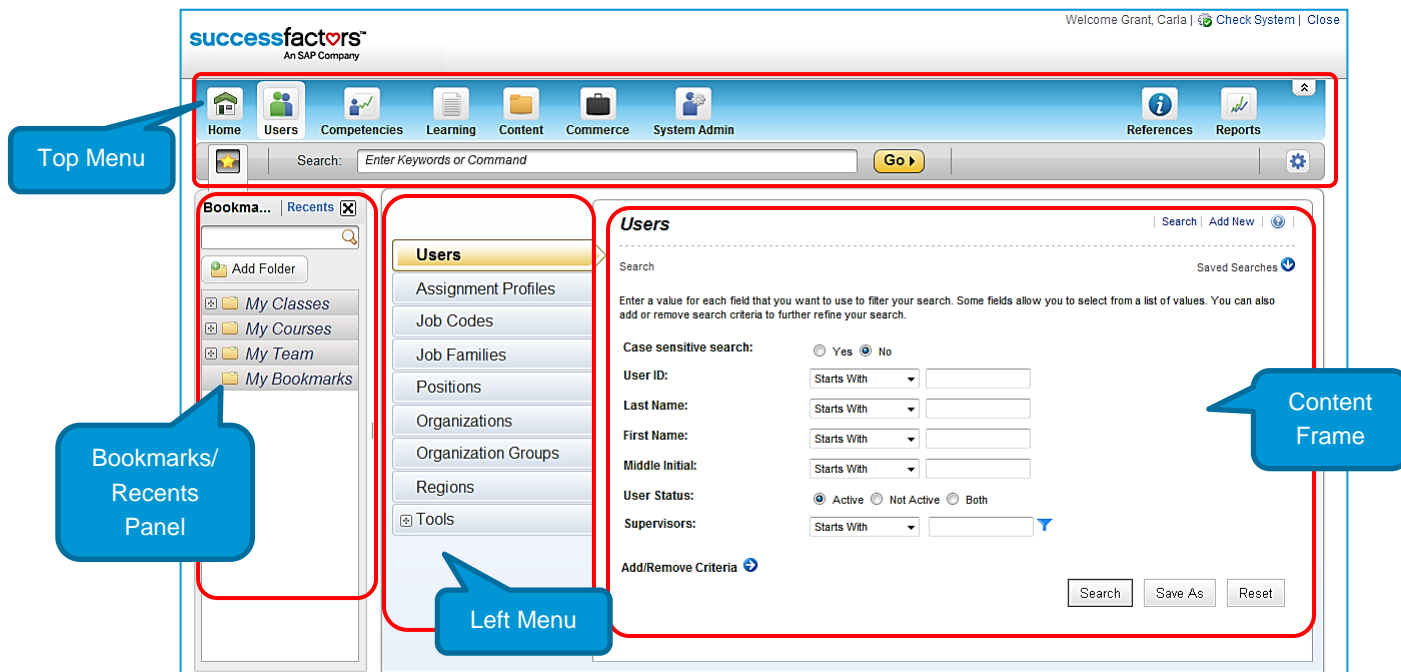


Figure 14. Admin Screen Layout

Top Menu Frame

The top menu frame (main menu) contains tabs and buttons to the main functional areas in SuccessFactors Learning (Figure 15).

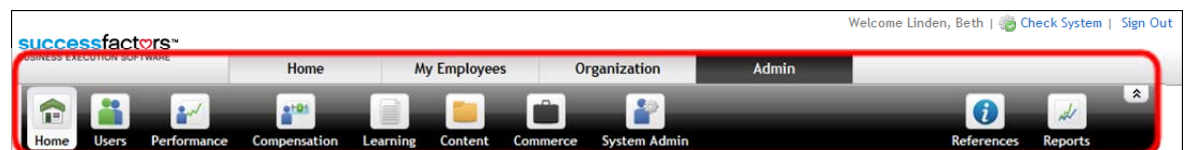


Figure 15. SuccessFactors Learning Standalone Environment: Top Menu Frame

The top menu frame of the SuccessFactors HCM/Learning integrated environment contains only buttons to the functional areas (Figure 16).

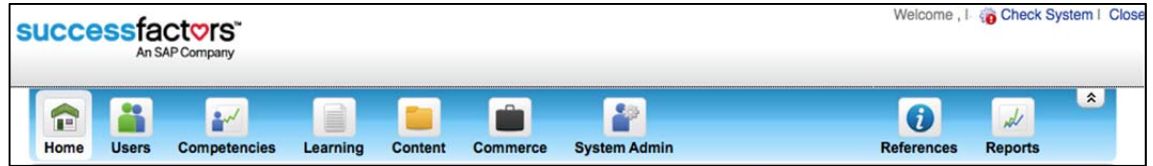


Figure 16. SuccessFactors HCM/Learning Integrated Environment: Top Menu Frame

The following tabs are only available in the standalone environment. Select a tab to access the respective SuccessFactors Learning interface and take specific user actions. Select:

- ▶ **Home** to toggle to and access your user account (interface)
- ▶ **My Employees** to toggle to your supervisor interface and manage your subordinates
- ▶ **Organization** to toggle to your organization owner interface and explore data (such as view item completions, learning projections, curriculum status, and registration status for a respective organization)
- ▶ **Admin** to toggle to and access your administrator account (interface)

This guide focuses specifically on the administrator interface of the SuccessFactors HCM/Learning integrated environment. When you navigate to **Learning > Learning Administration** from Administration Tools and the LMS opens in the new browser window, you can click any button in the button bar to access and take action in the respective functional area.



Note: Your functional area buttons may differ depending on the workflows and roles you are associated with.

When a button is selected from the top menu bar, its respective available options are displayed in the left menu frame. In Figure 17, for example, to access an item you must navigate to **Learning > Items**.

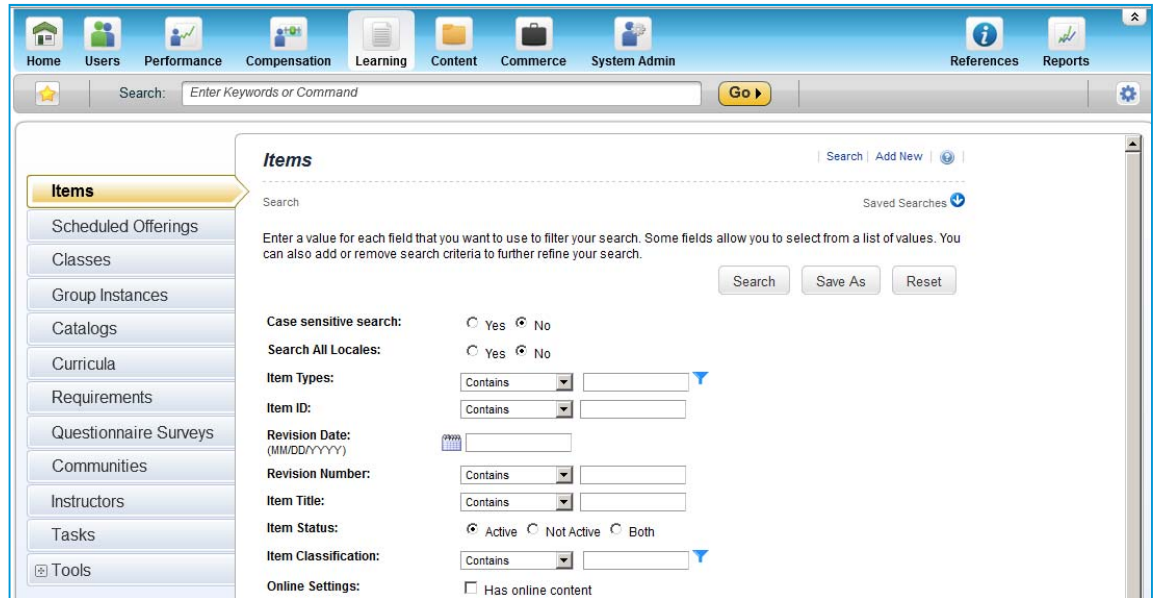


Figure 17. Integrated Learning Admin Menus

Also in this top frame, admins can access references, reports, and various preferences (Figure 18):

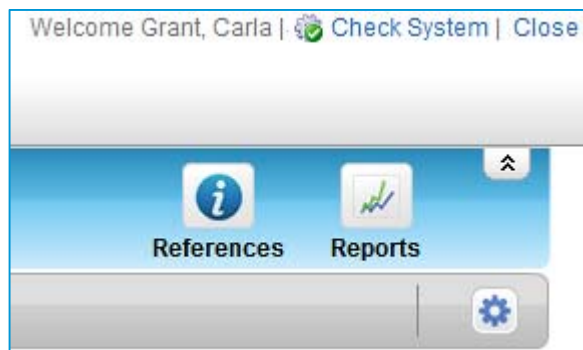


Figure 18. References and Reports

- ▶ Click **References** to manage the referenced fields that are used throughout SuccessFactors Learning, including calendars and time, geography, and physical resources. This overlay menu is conveniently accessed from any screen in the application without having to navigate to a separate screen.
- ▶ Click **Reports** to manage reports, including:
 - Searching for and running reports
 - Changing the description of reports

- Importing and exporting reports and libraries for customization in Report Designer
- Publishing and unpublishing reports



Note: The actions that you can take in the reports section are controlled by report workflows. See “Appendix A: Running, Saving, and Creating Recurring Reports” for more information reports.

- ▶ Click **Collapse** (⤴) /**Expand** (⤵) **Main Navigation** buttons to collapse or expand the button bar (Figure 19).

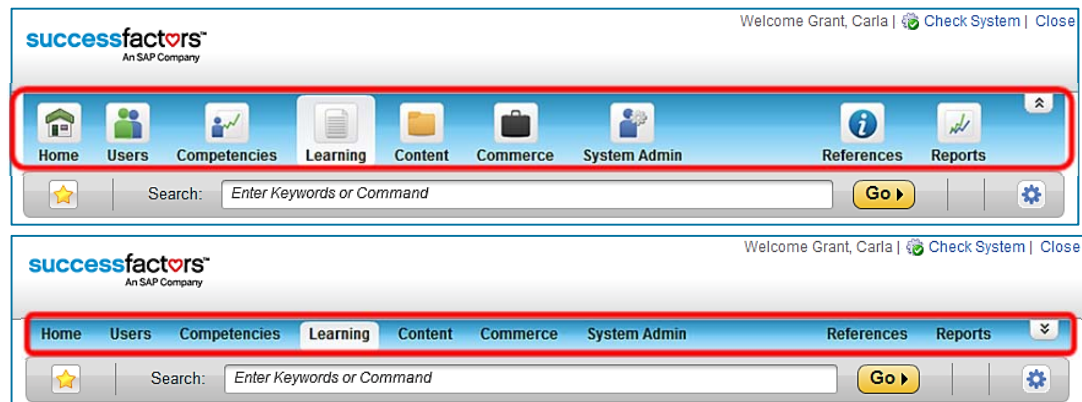


Figure 19. Button Bar Expanded and Collapsed

- ▶ Click the **Preferences** (⚙️) icon to change your locale (language, date/time format, etc.) and time zone settings, reset your e-signature personal identification number (PIN), and reset your password and security question/answer.
- ▶ Click **Check System** to check your system for the necessary software to run SuccessFactors Learning.
- ▶ Click **Sign Out** to end the current session.

Keyword and Quick Command Power Search – Overview

Use the **Search** textbox to perform a keyword or quick command search. Use the keyword search to locate a record based on the text that displays in one of the common fields for that record (for example, the title or description fields of items, curriculum, scheduled offerings, etc.).

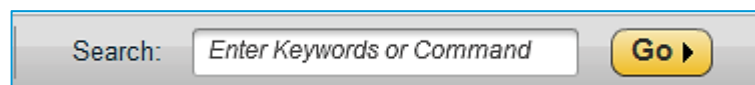


Figure 20. Keyword/Command Search Textbox

Use the quick command search to also perform a common action by typing the action verb (for example, **Add**) followed by the record that you want to act on (for example, **user**). You can also start typing the name of a tool (for example, **Registration Assistant**). As you start typing, the system displays the commands that are available to you (type-ahead search) (Figure 21).

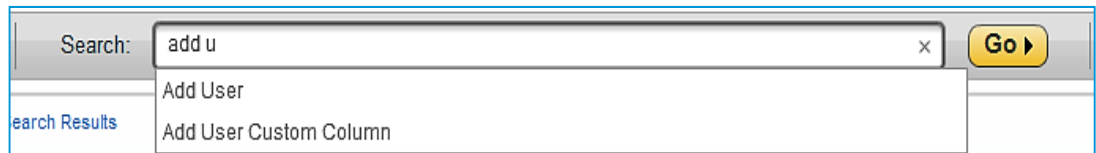


Figure 21. Search Textbox: Quick Command Search

When you see the action that you want to take or the tool that you want to use, click that item in the list to access the command or tool. Or finish entering your keyword/command and click **Go**.



Note: While the system restricts your type-ahead results based on your workflows, it does not perform a case-sensitive search; therefore, if you type "Tes", then the system shows "Required Dates Editor" (if you have permissions for that workflow) because the second word of that tool contains and ends with "tes".

Left Menu Frame

A related set of menu options display in the left menu frame, based on the button clicked in Top Menu Frame. If a menu item has subsections within it, a plus (+) is displayed (Figure 22).

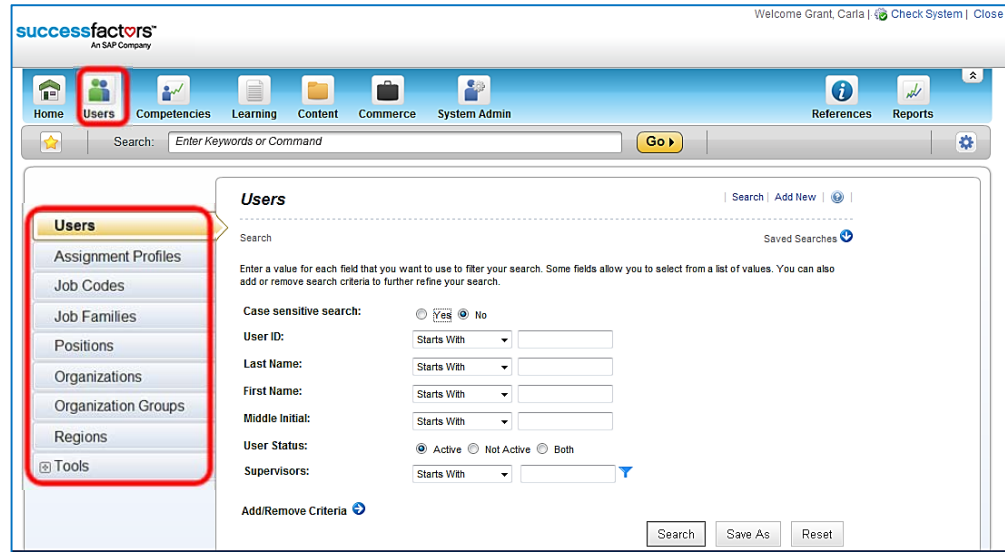


Figure 22. Left Menu Frame

Click the up and down arrows in the left menu (Figure 23) to see additional left menu options.

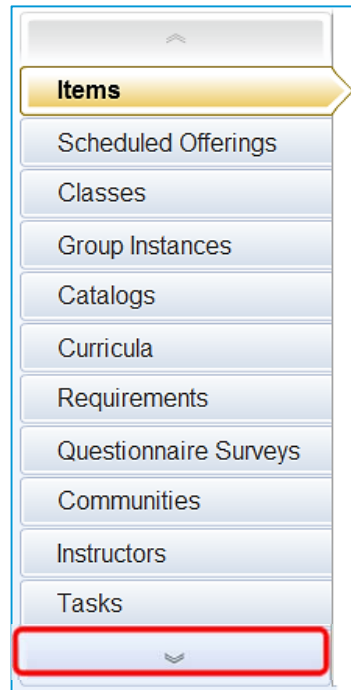





Figure 23. Left Menu Up and Down Arrows

Click  to expand that menu option. The  changes to  and the expanded menu options are displayed (Figure 24). Only one menu item can be expanded at a time.

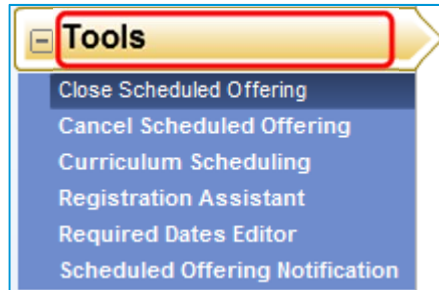
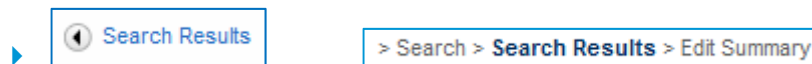


Figure 24. Expanded Left Menu Option

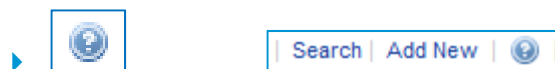
Content Frame

When a left menu option is selected, the corresponding screen displays in the content frame. This is the working area where searches are conducted to retrieve, view, and edit records.

There are two features on every page in the content frame:





Breadcrumbs display at the top-left corner of the content frame and identify the area, section, subsection (if applicable), tab, and mode currently open. Breadcrumbs may contain active links that facilitate navigation to previous screens.



The **Help** icon displays at the top-right corner of each content frame. Clicking this icon displays context-sensitive help for the specific section currently open, and opens the online help with access to contents, index, search, and the system glossary.

Bookmarks and Recently Accessed Records

Because the Bookmarks and Recents panel share the same space, you can switch between the two by clicking the **Bookmarks** link or the **Recents** link. When you need more screen space to view the record that you're working with, the system also allows you to hide the Bookmarks and Recents panel by clicking the Bookmarks button () or clicking the **Close icon** (). Click the **Bookmarks** button again if you wish to restore the panel (Figure 25).

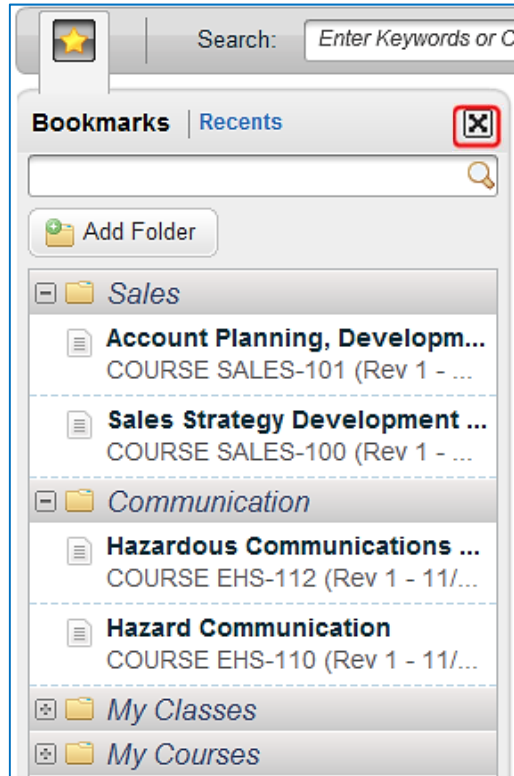


Figure 25. Bookmarks and Recents Panel

Bookmarks

The purpose of the Bookmarks area (Figure 26) in SuccessFactors Learning is to provide you with a method for organizing the database records and system entities that you need to access or modify most often. This allows you to skip the step of repeatedly searching for frequently accessed records.

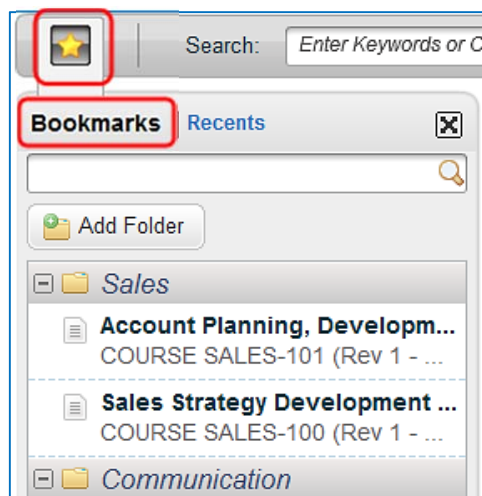


Figure 26. Bookmarks Button and Link

Bookmarks are accessible from any screen within the application. Entities can be bookmarked based on personal preference. Administrators have the ability to bookmark the following entities in SuccessFactors Learning (Figure 27) as well as Coupons, Purchase Orders, and Subscriptions:

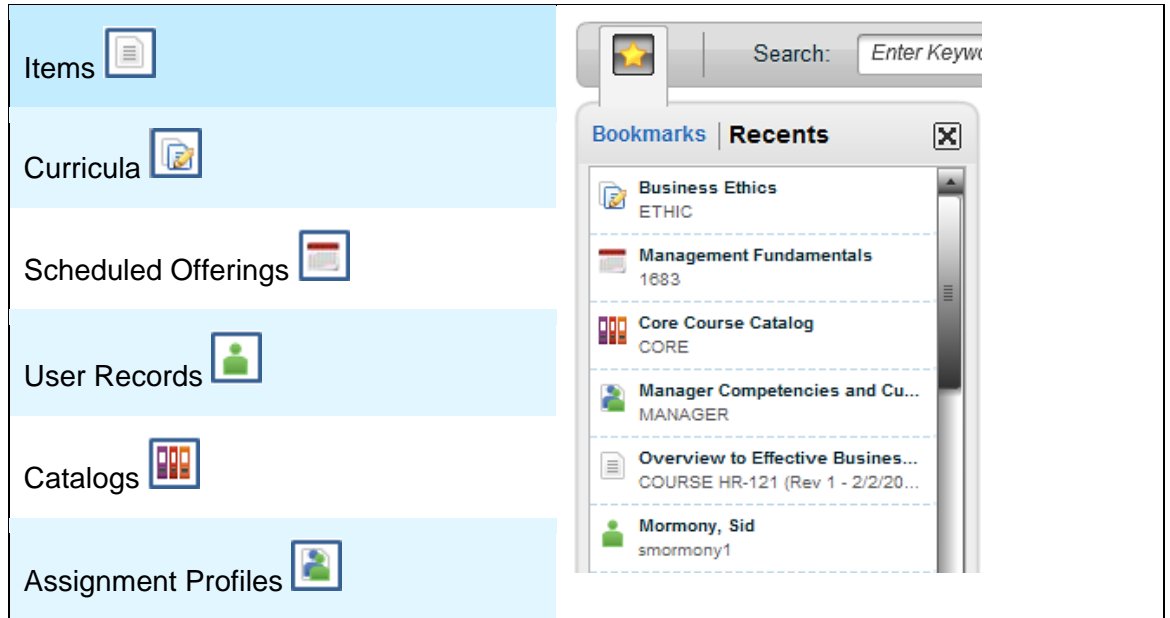


Figure 27. Bookmarks

Use the **Search Bookmarks** textbox to perform a “type ahead” filter on your current view. That is, when you start typing in this box, and you have one or more bookmarks that contain the text that you typed, then the system displays only those entities. The type-ahead filter is not case sensitive, and can be used to quickly locate the bookmarked records that you need.

If you hover your cursor over a bookmarked record, you can perform the available actions in the hover menu including **View record** which will take you directly to the bookmarked record (Figure 28).

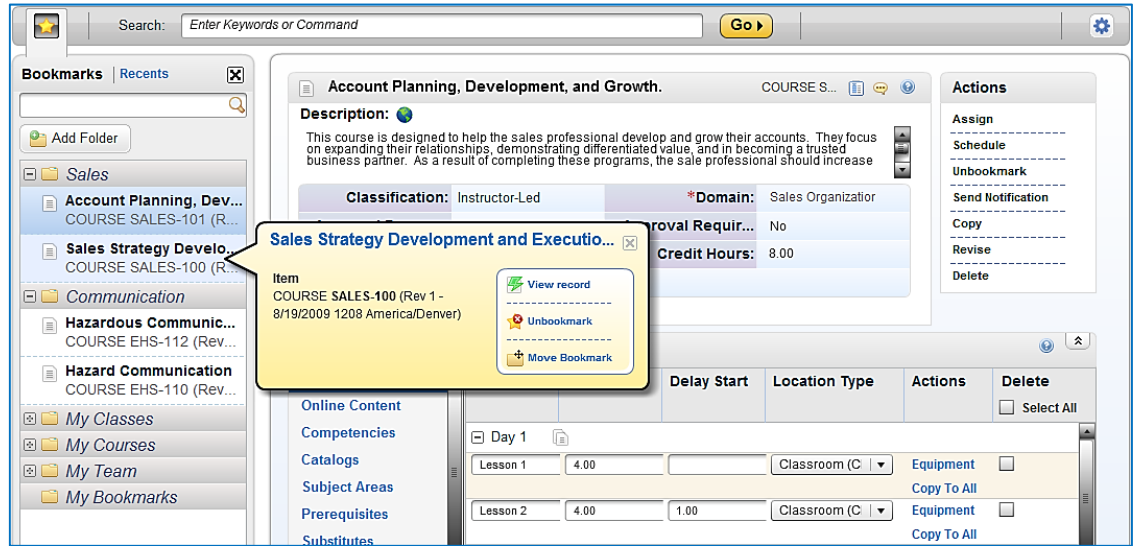


Figure 28. Record Hover Menu

Organizing Bookmarks

Click **Add Folder** to add a new folder at the top of the existing list of folders. After you add a folder, you can rename it by hovering over the folder and clicking **Rename Folder** or even **Delete Folder** if needed (Figure 29). You can only delete an empty folder (i.e., if it contains no bookmarked records).

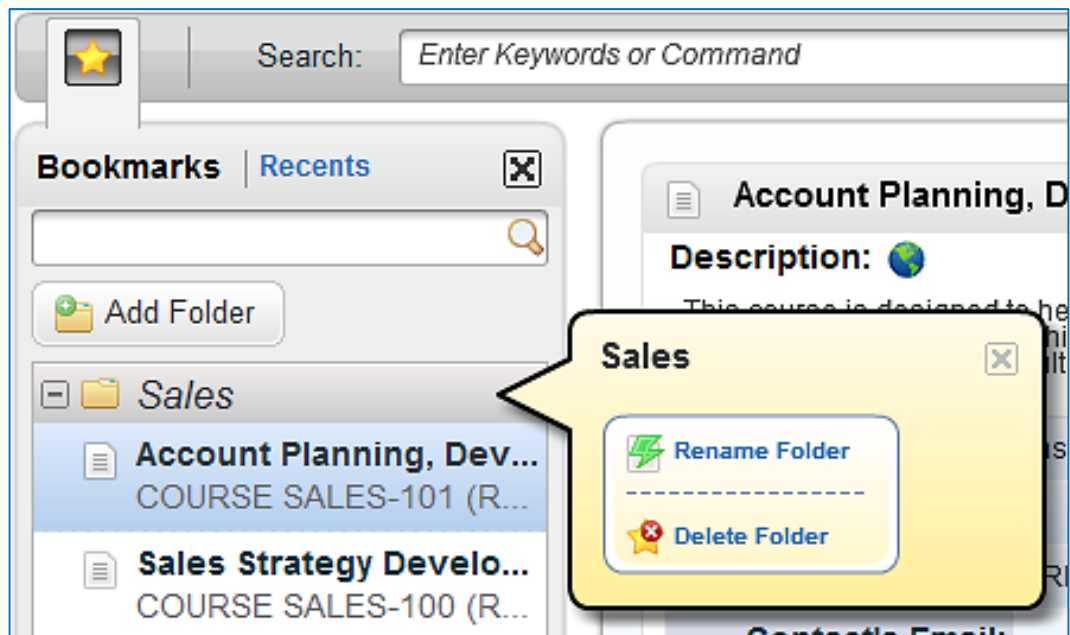


Figure 29. Rename/Delete Folder Options

Bookmarked records are stored in folders of your choosing, so you can structure and access the data in a way that makes sense to you. Upon first login, there is one default folder named *My Bookmarks*. You can create new folders as needed, and move bookmarks between folders.

You can reorganize the folder list by dragging and dropping bookmarked records or entire folders (including their contents) to a different position in the list. However, you cannot move a folder so that it becomes a subfolder. Therefore, to create something like a subfolder, we recommend you develop a naming scheme (for example, *Curricula_Online Training* or *Curricula_Instructor-Led Training*) to simulate a subfolder structure.

All folders that you create are private and cannot be shared; therefore, all records that you bookmark are your bookmarks and cannot be shared amongst other administrators. If another administrator changes your workflow permissions (i.e., edit or view privileges) for a certain record type, then some of your bookmarked records could disappear from your folders. However, if the administrator restores your workflow permissions, then the system returns your previously bookmarked records.

Recently Accessed Records

The Recents panel shows the records that you have accessed most recently at the top of the list (Figure 30). Finding records that were recently accessed allows administrators to return to previously viewed records much faster. Recently accessed records are available from anywhere and the feature tracks enough data so the user's activity in recent sessions is just a click or two away. The number of records that the Recents panel shows for all administrators is configured globally and is usually defaulted to 50.



Figure 30. Recently Accessed Records

The system places a record that you accessed at the top of the list when you:

- ▶ Add a new record
- ▶ View or edit a record from a search result
- ▶ Access a record from your bookmarks
- ▶ Access a record from the Recents panel

For example, if you directly assign an item to the user record (**Users > Users > Assigned Items**), then the system adds the user record to the Recents panel (because you're editing that record).



Note: The records that may be listed in the Recents panel include: Items, Curricula, Scheduled Offerings, Users, Catalogs, Assignment Profiles, Coupons, Purchase Orders, and Subscriptions.

Layout of Some Learning Records

The screen layout of some learning records contains three main areas (Figure 31):

- ▶ Core (red outline at the top left) (also called the Summary tab)
- ▶ Related (yellow outline at the bottom half)
- ▶ Actions (green outline at the top right)

The screenshot shows the SAP SuccessFactors Learning interface for an item record. The record is titled 'Overview to Effective Business Communication' (COURSE HR-121 (Rev 1...)).

Core Area (Red Outline): This area contains the item's description and key attributes. The description states: 'Understanding business communication is foundational to being an effective administrative support professional. Learn about the business communication process and techniques for effective communication such as listening effectively and sending messages. This course, Overview of Effective Business Communication, will help you to become successful in today's fast paced business world.' The attributes are as follows:

Classification: Instructor-Led	*Domain: Human Resources (HR)
Approval Process: (Employee or Supervisor)	Approval Required: Yes
Assign. Type: REC (Recommended)	Credit Hours: 6.00
Contact's Email: admin@plateau.int	

There is a 'View All' button below the attributes.

Actions Area (Green Outline): This area contains a list of actions: Assign, Schedule, Bookmark, Send Notification, Copy, Revise, and Delete.

Related Area (Yellow Outline): This area shows a table of related segments. The table has columns for Description, Duration, Delay Start, Location Type, Actions, and Delete. The data is as follows:

Description	Duration	Delay Start	Location Type	Actions	Delete
Day 1					
Business Communication Simulation	4.00	1.00	Classroom (CLA)	Equipment Copy To All	<input type="checkbox"/>
Business Communication Simulation	4.00	1.00	Classroom (CLA)	Equipment Copy To All	<input type="checkbox"/>

On the left side of the Related area, there is a sidebar with links: Segments, Online Content, Competencies, Catalogs, Subject Areas, Prerequisites, and Substitutes.

Figure 31. Item Record Layout

The Core area (or Summary tab) contains summary information about the record. Click [View All](#) to display the Additional Settings page of the entity record. To edit any field in this area or Additional Settings page, click in a displayed field and enter text or select a reference value (depending on the field type).


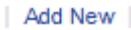









The Related area contains additional information regarding the entity record.

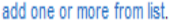
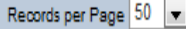




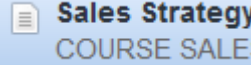
The Actions area includes links for you to take additional actions on the record.

Navigating in SuccessFactors Learning

Table 1 provides a list of universal controls found throughout SuccessFactors Learning.

Table 1. Commonly Used Navigation Icons

Icon	Description
	The Search link opens a search page (more on how to use the search pages in the next section).
	The Add New link can always be found in the top right corner of the content frame. This link allows the admin to create new records.
	Some records may have more sections than what can be displayed on the details page. For these records, click the More link to access the additional tabs.
	Click Apply Changes to save new or edited information in an existing.
	Click Save after editing information on an existing database record. This button only displays when a record has information added, removed, or modified. For some records this button will display instead of Apply Changes .
	Click the Cancel button to cancel your unsaved changes.
	The Plus button allows you to associate another record with the entity. For example, within the Catalogs section of an item, click the plus button to add catalogs to the item.
	The View All link is located at the bottom left of the core area for some records. Click this link to view the Additional Settings page for the record (displays additional details about the record).
	Click Add to save a new record into the database once an admin has completed all necessary fields.
	Once an admin has accessed a record in edit mode, the admin can click Copy to copy the existing record to a new unique ID.
	Once an admin has accessed a record in edit mode, the admin can click Delete to remove the record from SuccessFactors Learning.

Icon	Description
	<p>The add one or more from list link opens a search window; one or more search criteria can be entered to locate and retrieve the desired information.</p>
	<p>The Records per Page drop-down menu allows admins to set the number of search result records displayed on the screen at one time. This setting holds until the admin logs out of the session, and reverts to the system default upon next login.</p>
	<p>An admin can navigate through search results using the Page feature. They can scroll through the search results page-by-page or jump to a specific results page. On a search results page, an admin can use the Select All / Deselect All links to select all, or deselect all, results.</p>
	<p>The View icon accesses a record as read-only.</p>
	<p>The Edit icon accesses a record and allows an admin to make updates.</p>
	<p>The Star icon represents that the entity can be bookmarked. Administrators can click the star to add the record to their own personal bookmarks from the search results or can add it to their bookmarks from within the record.</p>
	<p>Accessing records that can be bookmarked is done with a single click. For example, if the administrator has view and edit rights, selecting the record will take you into a consolidated edit/view mode.</p>

Cross Entity Linking

When accessing any record, users frequently see related associations that they would like to investigate more fully. Cross entity linking makes each association a hyperlink and takes the user to the record in question. This means less searching and more efficient use of time. For example, within a curriculum's Contents tab from the Related area, an admin has the ability to select an item title and go directly to that item's record (Figure 32).

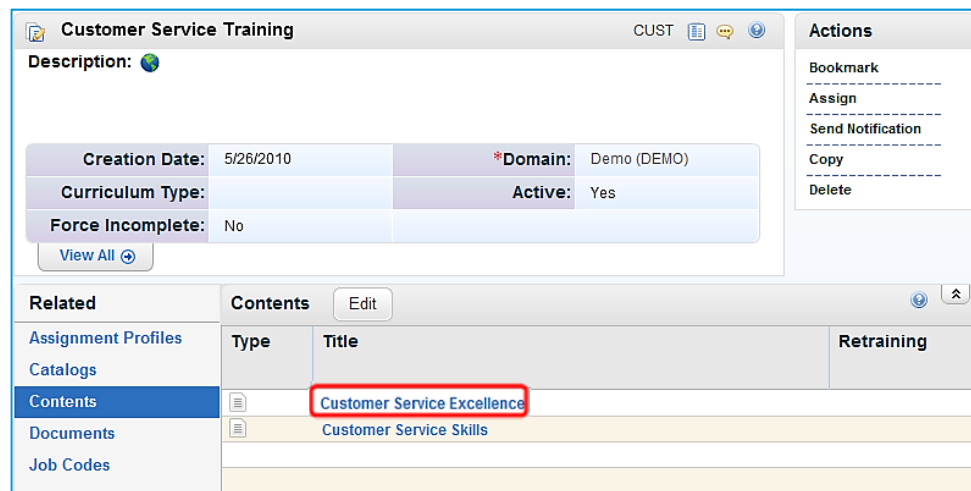


Figure 32. Cross Entity Linking

Searching

The search feature is critical to most workflows in the system, including viewing records and using wizards. Each menu option selected on the left page will open up a search page. Use the search feature to:

- ▶ Create and delete a search filter
- ▶ Add and remove criteria from your search filter
- ▶ Adjust the display of your search results
- ▶ Save your search to use later
- ▶ Sort your search result
- ▶ Download search results to Microsoft Excel



Note: You can also use the *User Viewable Domains* filter found under your *Preferences* section to further refine the results of your search. Your selected user-viewable domains are listed in the domains drop-down menu.

Searches are filtered criterion-based queries to locate and access data within SuccessFactors Learning. By entering search criteria, administrators can search for different types of results. On each search page, you will most likely see the following terms in the drop-down menu associated with most entities in your search criteria (Figure 33).

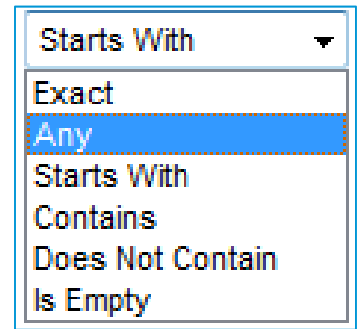


Figure 33. Search Criteria

Select:

- ▶ **Exact** if you know the precise ID of the record. Enter the exact record ID and click **Search**. Only one value can be entered into the search field.
- ▶ **Any** to use multiple exact ID's or descriptions of the record. Enter one or more criterion separated by a comma and click **Search**. For example, if searching for all user records containing the last name *Smith* or *Smithfield*, enter the exact first names separated by a comma, select **Any** from the drop-down menu, and click **Search**.

Last Name:

- ▶ **Starts With** if you know the first part of an ID or description. Type the first few letters or numbers of the record and click **Search**.
- ▶ **Contains** if you know any part of the record ID or description. Enter the part of the ID/description you know and click **Search**.
- ▶ **Does Not Contain** if you know the ID or description does not contain a certain letter or number. Enter that text in the textbox and click **Search**.
- ▶ **Is Empty** to return all records where the specified field is empty. For example, if searching for all items without a title, select **Is Empty** for the item title criteria and click **Search**. This operator is only available in non-required fields.

Item Title:

You can choose whether or not you want your search to be case sensitive by setting the **Case sensitive search** option. To do a non-case-sensitive search, select **No** (if that is not the default setting). Please note that a non-case-sensitive search may take longer.

Case sensitive search: Yes No

You can also choose whether or not you want your search to include all available locales. When enabled, the search includes all locales in the keyword search for all data that has been localized.

Search All Locales: Yes No

Localized Fields

Fields that are localized (such as item title and description) will have a globe icon (🌐) next to them. Clicking this icon permits the admin to enter a value for the field in each of the languages the customer is using.

Translation ✕





English Locale: Effective Administrative Support Professional S...

<i>Locale</i>	<i>Value</i>
Brazilian	<input type="text"/>
French	<input type="text"/>
Spanish	<input type="text"/>

Commonly Used Search Icons

Table 2 lists the icons and their descriptions of the most commonly used search functions in SuccessFactors Learning.

Table 2. Commonly Used Search Icons

Icon	Description
	The Select Date icon is associated with the date field. Use it to select and populate the corresponding date field.
	Use the Filter by criteria icon to find and select a corresponding entity to include in your search filter.
	Use the Clear Filter icon to clear the content of your corresponding search filter.
	Use the Search Picker icon to select from a list or find and select the corresponding entity using a filter.



Job Aid: Searching

Adding/Removing Search Filters

Each entity in SuccessFactors Learning has multiple attributes and you may find that some of the attributes are more useful than others in conducting searches. The system gives you many search criteria filters to determine the attributes of the entity that you would like to use for your search.

The search filter determines the contents of your results by listing only entities that satisfy all the criteria specified by your filter. For example, you may want to list only users who are part of a specific organization. You must specify the organization in a filter and apply that filter to the search criteria to see only those users that relate to the selected organization. This is beneficial for administrators to search by various attributes of specific criteria when exact ID is not known.

To add or remove the organization search filter:

1. Navigate to **Users > Users**.



Figure 34: Search for Users

2. If necessary, click **Add/Remove Criteria** (➔) to add the Organizations search criteria to the search screen.



Figure 35: Add/Remove Criteria



Note: Search criteria displaying on your screen will be persistent to your login.

3. The Search Criteria pop-up window displays (Figure 36).

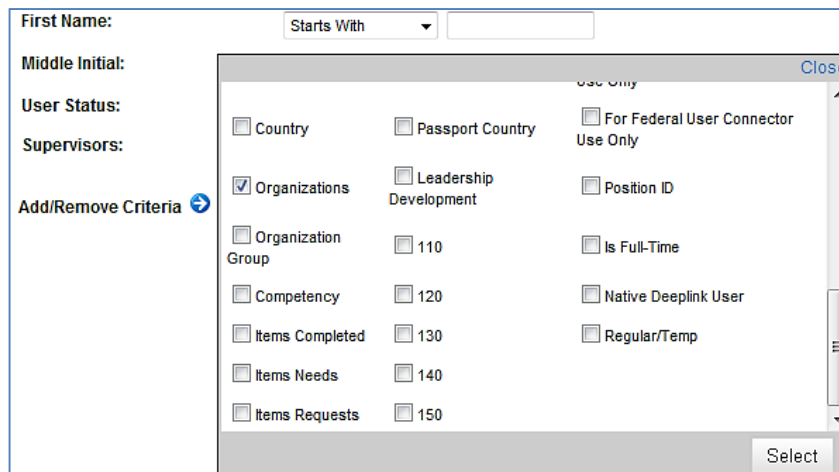


Figure 36. Search Criteria Pop-up Window

4. Select the **Organizations** checkbox and click **Select**.

5. The Organizations search query displays on the Users search screen (Figure 37).

The screenshot shows the 'Users' search interface. At the top, there are links for 'Search', 'Add New', and a help icon. Below this is a 'Search' section with a 'Saved Searches' dropdown. A text box instructs the user to enter values for search fields. The search criteria include:

- Case sensitive search: Radio buttons for 'Yes' and 'No' (with 'No' selected).
- User ID: 'Starts With' dropdown and text input.
- Last Name: 'Starts With' dropdown and text input.
- First Name: 'Starts With' dropdown and text input.
- Middle Initial: 'Starts With' dropdown and text input.
- User Status: Radio buttons for 'Active', 'Not Active', and 'Both' (with 'Active' selected).
- Organizations: 'Starts With' dropdown and text input, with a blue downward arrow icon to its right.
- Supervisors: 'Starts With' dropdown and text input, with a blue downward arrow icon to its right.

 At the bottom, there is an 'Add/Remove Criteria' link and three buttons: 'Search', 'Save As', and 'Reset'.

Figure 37. Selected Search Query Displays

6. To create the filter on the criteria, click the Organizations **Filter by criteria** icon (▼).
7. The Create Filter screen displays (Figure 38).

The screenshot shows the 'Organizations Filter For ...' dialog box. The title bar includes a close button. Inside, the 'Users' search interface is visible, but the focus is on the 'Organizations Filter For Users' section. At the top right of this section, there is a yellow bar that says 'Filter: 0 Organizations' and a 'Submit Filter' button. Below this, a text box explains that the search is case sensitive by default. The search criteria for organizations include:

- Case sensitive search: Radio buttons for 'Yes' and 'No' (with 'No' selected).
- Organization ID: 'Starts With' dropdown and text input.
- Description: 'Starts With' dropdown and text input.
- Organization Type: 'Starts With' dropdown and text input, with a blue downward arrow icon to its right.
- Organization Group: 'Starts With' dropdown and text input, with a blue downward arrow icon to its right.

 At the bottom, there is an 'Add/Remove Criteria' link and three buttons: 'Search', 'Submit Criteria', and 'Reset'.

Figure 38. Create Filter Screen

8. If you don't know the ID for the organization you are looking for, type in the search box for the attribute or Organizations on the screen.
9. Click **Search** to display your search results.

10. Click the checkbox(es) to select your choice(s) from the search results and click **Add to Filter** to display your selected criteria to the filter (Figure 39).

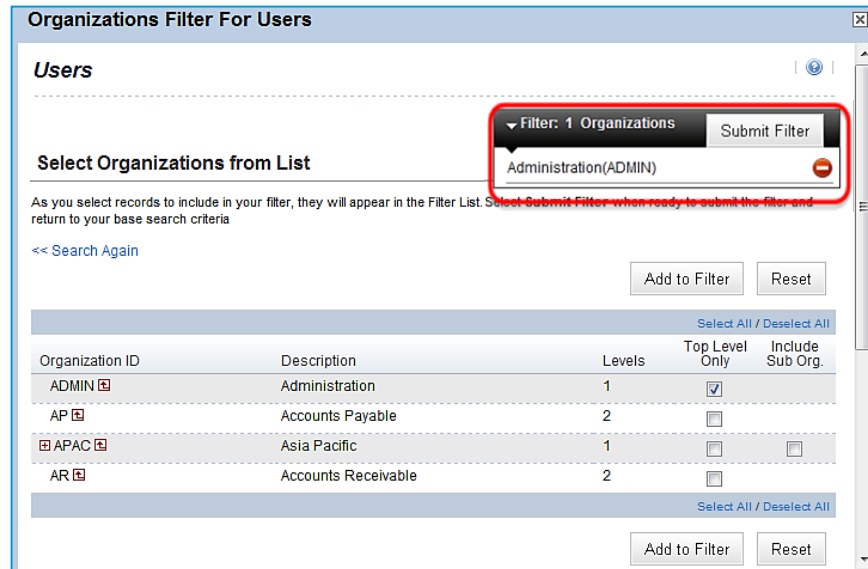




Figure 39. Search Filter Screen

11. Confirm your selection(s) are correct and click **Submit Filter**.
12. You are returned to your original search screen. You see that the organization search attribute has three (3) criteria selected for this filter (Figure 40).




Figure 40. Search Filter Criteria

13. You can modify this filter by clicking the **Filter by criteria** icon (), or you can clear the filter by clicking the **Clear Filter** icon ().

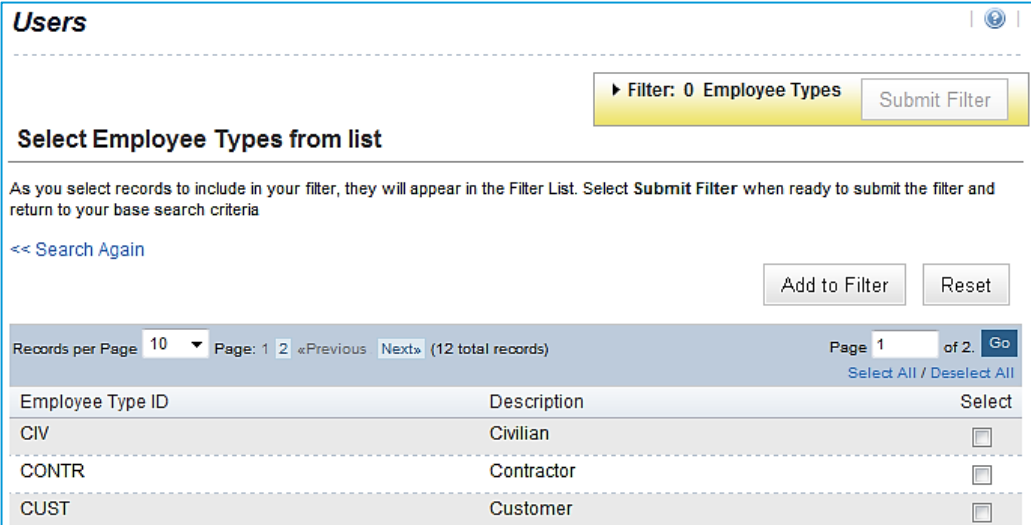
Selecting From a List

SuccessFactors Learning has a number of reference lists that you can select from without creating and submitting a filter. You must review the list, and check the objects you want to use in your search filter.

To narrow our search to show only users who are a particular employee type, such as *Civilian*:

1. Navigate to **Users > Users**.
2. If necessary, add the **Employee Types** search criteria.
3. Click the employee types **Filter by criteria icon** ().
4. If you don't know the exact employee type ID, enter search criteria in the Search Employee Types section of the screen and click **Search**.

You see a list from which you can select one or more objects to populate the related field (Figure 41).



Users

Filter: 0 Employee Types

Select Employee Types from list

As you select records to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

[<< Search Again](#)

Records per Page: 10 Page: 1 of 2 (12 total records)

Employee Type ID	Description	Select
CIV	Civilian	<input type="checkbox"/>
CONTR	Contractor	<input type="checkbox"/>
CUST	Customer	<input type="checkbox"/>

Figure 41. Create Filter Results List

5. Check the box for the record(s) you wish to select.

6. Click Add to Filter.

The selection is added to the search filter (Figure 42).

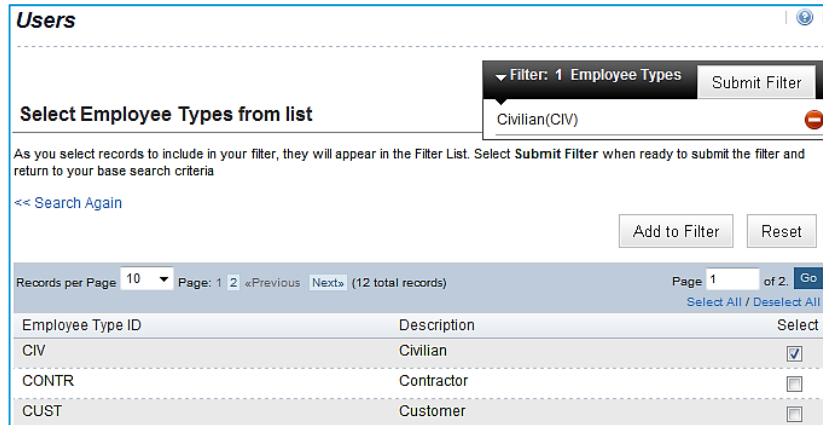


Figure 42. Criteria Added to Filter

7. Review the filter for accuracy.

8. Click Submit Filter.

You are returned to your original search screen and see the employee types search attribute has one (1) criteria selected for this filter (Figure 43).



Figure 43. Search Criteria Selected

9. To clear the list of selected entities, click the Clear Filter icon ().

Searching by Custom Columns

If you are searching by a custom column that has a list of reference values, you can use the same method as above with the Filter by criteria icon ().

If you are searching by a non-referenced field, you would need to use the Starts With or Contains search selectors and free text.



Note: Custom Columns are localized fields and the values they contain will appear to the admin (and be searchable) based on the admin's language preference (locale).

Saving Your Individual Search

You can save a search filter and reuse the criteria specified in the search filter. The search filter is individual-based and available only to you.

To save the search we just defined for employee types:

1. Click **Save As** at the bottom of the screen (Figure 44).

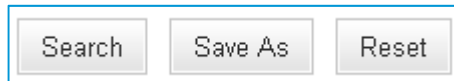


Figure 44. Search Screen

2. The system prompts you for an ID for your saved search and a brief description of the search (Figure 45).

 A screenshot of the 'Save Search' dialog box. It has a title bar 'Saved Searches' and a search icon. Below the title bar, it says '> Search > Save Search'. The main section is titled 'Save Search'. There is a red asterisk followed by '= Required Fields'. Below that, there is a field for 'Saved Search ID:' with the value 'EMPTYTYPE_Civilian' and a magnifying glass icon. Below that is a 'Description:' field with the value 'Employee type is civilian'. At the bottom right, there are 'Submit' and 'Reset' buttons.

Figure 45. Save Search

3. Enter an ID with a description that is intuitive to make referencing it in the future easier. A description is also strongly recommended.
4. Click **Submit**.

To access your saved searches:

1. Click **Saved Searches** at the upper right corner of the content frame (Figure 46).

 A screenshot of the 'Users' search screen. The title bar says 'Users' and has 'Search | Add New | Refresh' icons. Below the title bar, there is a search filter section with 'Saved Search ID:' set to 'EMPTYTYPE_Civilian' and 'Description:' set to 'Employee type is civilian'. Below that, there is a text area with instructions: 'Enter a value for each field that you want to use to filter your search. Some fields allow you to se... add or remove search criteria to further refine your search.' Below that, there is a 'Case sensitive search:' section with radio buttons for 'Yes' and 'No', where 'No' is selected. Below that, there is a 'User ID:' field with a 'Starts With' dropdown menu. On the right side, there is a 'Saved Searches' dropdown menu that is open, showing a list with columns 'Name' and 'Remove'. The list contains one entry: 'EMPTYTYPE_Civilian (Employee type is civilian)'. A red box highlights the 'Saved Searches' dropdown menu.

Figure 46. Search Screen: Saved Searches

2. Click to select the search you wish to conduct.

The selected search screen displays (Figure 47). The saved search ID and description are displayed at the top.

The screenshot shows the 'Users' search interface. At the top, there are 'Search' and 'Add New' buttons. Below that, the 'Saved Search ID' is 'EMPTYTYPE_Civilian' and the 'Description' is 'Employee type is civilian'. A message instructs the user to enter values for search fields. The 'Case sensitive search' is set to 'No'. Search criteria include: 'User ID' (Starts With), 'Last Name' (Starts With), 'First Name' (Starts With), 'Middle Initial' (Starts With), 'User Status' (Active, Not Active, Both), 'Organizations' (Starts With), and 'Employee Types' ([1 Selected]).

Figure 47. Selected Saved Search Screen

Adjusting the Display of Your Search Results

Your search result is the set of related entities that fit the search criteria you specified. You may, however, choose to review the results by specific fields not based on all of the attributes of the search result.

To adjust the display of your search results:

1. In the search results section, click **Field Chooser**.

The Field Chooser pop-up window displays. Use this window to determine which attributes of the listed entities to display in the search results and in which column. The first column (1) always displays the record's ID and is non-editable. For some entities, the second column is non-editable as well. You can add and/or remove other columns (Figure 48).

The screenshot shows the 'Field Chooser' pop-up window. It has a 'Close' button and a 'Send Notification' button. Below that are 'Select All / Deselect All' and 'Notify' buttons. A table lists fields to be displayed in search results. The first column (1) is 'User ID', the second (2) is 'User Name', and the third (3) is 'Job Location'. The fourth column (4) is 'Active', which is highlighted with a red box. Other fields include 'Has Access', 'Address', 'Locked', 'City', 'Region ID', 'State / Province', 'Role ID', 'Emp Status', 'Postal Code', 'Profile Status', 'Emp Type', 'Country', 'Position ID', 'Job Code', 'Supervisor', 'Is Full-Time', and 'Domain ID'. A 'Submit' button is at the bottom.

Figure 48. Field Chooser

2. Select the attributes you want to display. In this example, we want to show the *Job Location* field in the third column and *Active* in the fourth column.
3. Enter the number of the column from the left in which you want to see the data. The column number you enter is sequential (i.e., 1, 2, 3, 4, etc.)
4. Click **Submit** to see your search results (Figure 49).

User ID	User Name	Job Location	Active	Notify
☆ AMYMABED	Abed, Amy M		Yes	<input type="checkbox"/>
☆ RAYAMABED	Abed, Raya M		Yes	<input type="checkbox"/>
☆ RENABED	Abed, Reitha N	MUN	Yes	<input type="checkbox"/>
☆ ROBEEABED	Abed, Robert E		Yes	<input type="checkbox"/>
☆ LAURGABEL	Abel, Lauren G		Yes	<input type="checkbox"/>
☆ LYEABEL	Abel, Lyndsey E	DC	Yes	<input type="checkbox"/>
☆ STEVJABEL	Abel, Steven J		Yes	<input type="checkbox"/>

Figure 49. Search Results Display

Sorting Your Search Results

Once you have the results you are looking for, you can sort it based on key columns on your list (except the Description and Employee Status column/field).

To sort the list by an entity, find the column and click the header: an up arrow head indicates ascending order, A>Z; and a down arrow head indicates descending order, Z>A (Figure 50).

User ID	User Name	Job Location	Active	Notify
☆ MAAZWANZIG	Zwanzig, Macy A	BKK	Yes	<input type="checkbox"/>
☆ MARTSZWANZIG	Zwanzig, Martina S		Yes	<input type="checkbox"/>
☆ MEGASZWANZIG	Zwanzig, Megan S		Yes	<input type="checkbox"/>
☆ MEGHRZWANZIG	Zwanzig, Meghan R		Yes	<input type="checkbox"/>
☆ CRYSGZUNNO	Zunno, Crystal G		Yes	<input type="checkbox"/>
☆ DAVILZUNNO	Zunno, David L		Yes	<input type="checkbox"/>
☆ JAKZUNNO	Zunno, Jamie K	VA	Yes	<input type="checkbox"/>

Figure 50. Sort Search Results

Downloading Your Search Results

Once you have the results you are looking for, you can download the search results to an Excel file:

1. Click **Download Search Results**.

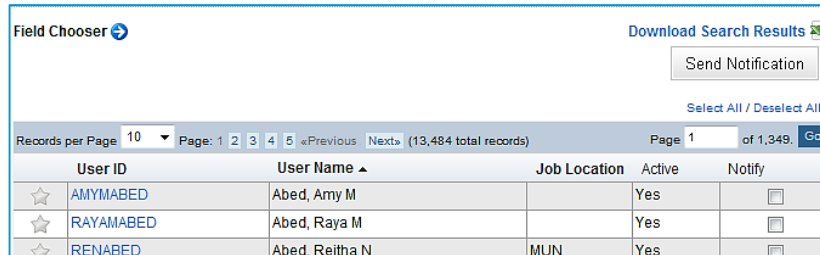


Figure 51. Download Search Results

2. Select whether to open or save the file in the dialog box (Figure 52).

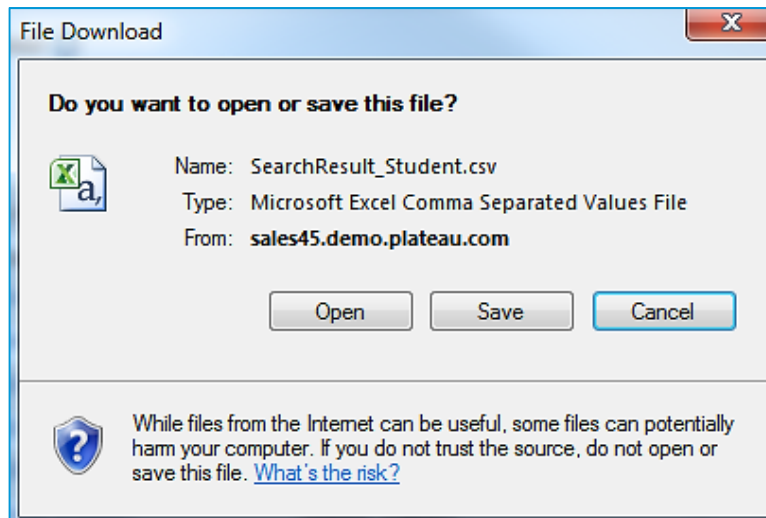


Figure 52. Open or Save Search Results

Keyword and Quick Command Power Search

Use the **Search** textbox to perform:

- ▶ Quick command searches
- ▶ Single searches
- ▶ Multiples searches

Quick Command Search

Enter a command to access that menu item; commands can return things such as: 'Add *entity*', tools, and wizards. Executing the command takes the user to the area in the application where the command is found in the menus. Type-ahead is also available so typing the word 'learn' will find Record Learning and Learning Editor among others. Reference and Report areas are not included in the command search.

Single Search

Entering an entity name highlights the 'reserved' word to show the admin that SuccessFactors Learning has recognized it, for example Item. Adding more terms enables a search on the entity. Press **Enter** or click **Go** to activate the search.

Multiple Search

Entering non-entity names or commands executes a multiple entity search. The search, once activated, loops through entities in the system and searches them all for the entered value. You can pause and resume the search at any time during the entities being searched. The entities are searched in a specific order. Changing the order must be done through the back end. Each search response shows the entity where the record was found. Search results are limited to common fields across all entities (IDs, name/title/description). Workflows and domains still control access to commands and search results. Search results can be filtered with the header and typing in your filter or selecting from the drop-down menu.

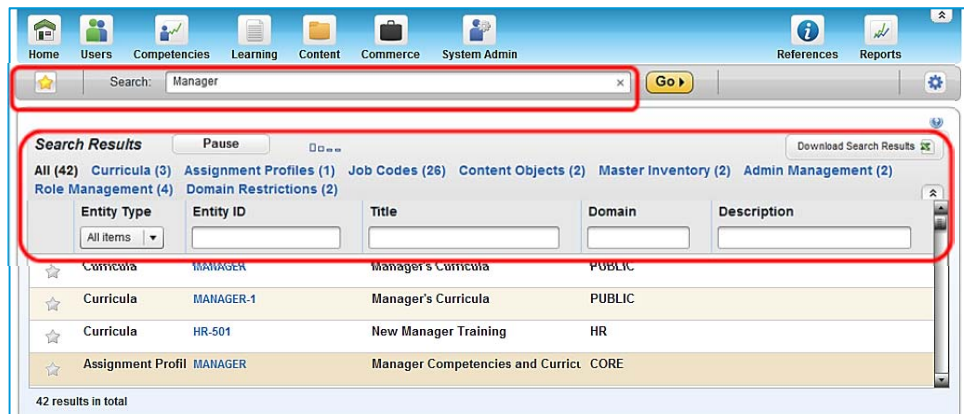


Figure 53. Using Search Bar

The header area of the search shows live results, which record types (items, users, assignment profiles, etc.) the system is searching, and the number of records found. The system groups these results by entity type: the first column in the table. You can use the drop-down menu to further define your search. Because the system updates the results in real time, you can click **Pause** to stop the search whenever you think you have identified the record that you're looking for.

When you click **Download Search Results**, the system converts the search results into a .CSV file. Use one, some, or all of the textboxes at the top of columns to perform a "type ahead" filter on your current view. The results area of the search displays all of the records containing the string that you enter into the search textbox, even if the records are different types of records (items, users, assignment profiles, etc.). Once the search is conducted, you can sort the order of results by clicking the field headings at the top of the table. Depending on your role, you may have access to access the record in either view or edit mode.

Record Layout Consolidation

Commonly used record types can be accessed in a consolidated format to view and edit (Figure 54). This allows better access to the information with commonly used information more obvious, and data accessed less frequently more recessed, to make the entire experience more intuitive. Information about how to globally configure records can be found in the online Help system under the **System Administration > Configuration** section (Figure 54).

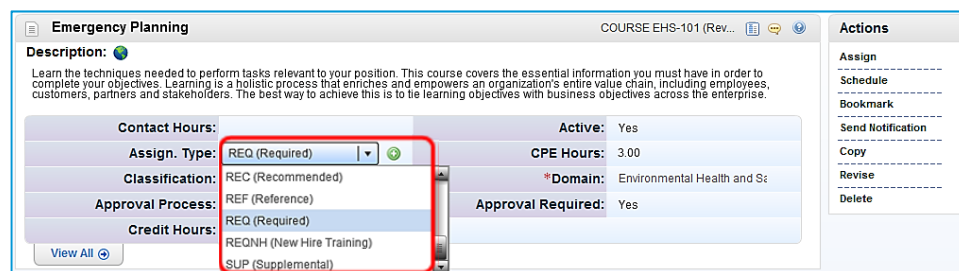



Figure 54. Item Record Layout

Record Layout Configuration (Personalize Fields)

In the Personalize pop-up window (), select one or more available fields from the left column. Click the **Add** or **Add All** button in the middle to add the selected fields to the Display column on the right. All fields listed in the right column will be displayed in the core area of the record. If you select the **Required** checkbox (Figure 55), then administrators are required to supply a value for the field.

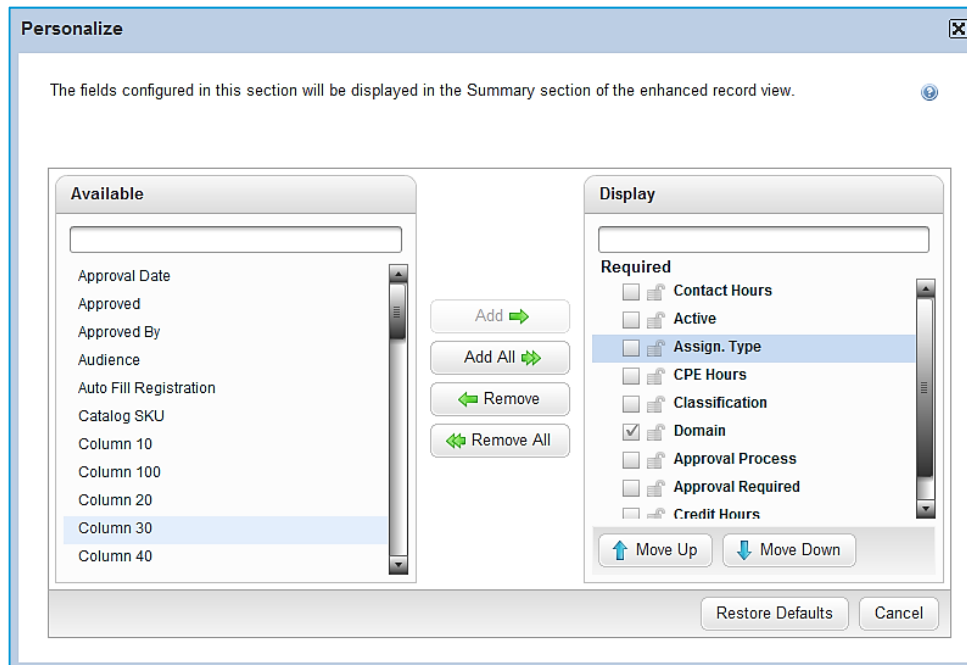


Figure 55. Personalize Fields Pop-up

In addition, the various associations themselves can be turned off to simplify the layout and remove unneeded fields and data from the interface.

Recommended Next

Once a record that can be bookmarked has been added, the system will provide a few choices for what can be done to make the record more usable. This allows new administrators to understand what can and should be done to make this record and the system more functional overall. When you click the **Recommended Next button** (🗨️), the system shows all of the actions that you might want to take next. The recommended next steps are intelligent and will disappear once the action shown has been completed (Figure 56).

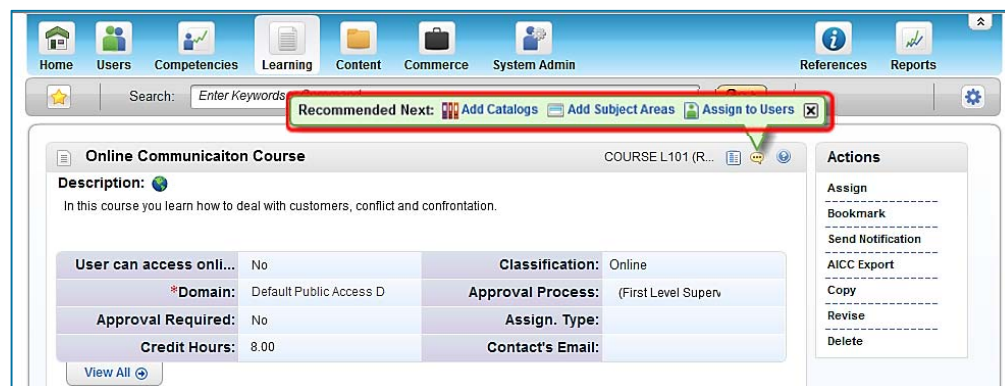


Figure 56. Recommended Next Pop-up

Conclusion

In this module, you were introduced to the general guidelines for accessing, navigating, and searching within SuccessFactors Learning.

You should now be able to:

- ▶ Identify admins and users in SuccessFactors Learning
- ▶ Navigate within SuccessFactors Learning as an admin
- ▶ Use the keyword/quick command Search function
- ▶ Work with and organize bookmarks and recents
- ▶ Create search filters and search for records in SuccessFactors Learning
- ▶ Download and view or save search results

Knowledge Check

Use what you learned in this module to answer the following questions.

1. What is the difference between an admin and a user of the SuccessFactors Learning system?

Admin:

User:

2. Scenario: You're conducting a search for a user record. Unfortunately, you only know that this user's last name starts with the letter R. On the users search screen, which is the best search criteria to select from the drop-down menu to return all users whose last name begins with the letter R?
 - a) Any
 - b) Starts With
 - c) Contains
 - d) Is Empty

Notes

Module 2. Learning Needs Management Overview

The goal of this module is to introduce you to the Learning Needs Management Model and how it is implemented in SuccessFactors Learning. You will also learn the terms and their definitions as they are used in the model.

Objectives

Upon completion of this module, you will be able to:

- ▶ Describe the Learning Needs Management Model
- ▶ Explain the process of implementing the model
- ▶ Identify and define the terms associated with the model

Learning Needs Management Model

By implementing the enterprise-wide SuccessFactors Learning system, your organization can easily track and report on the current training status of your user population. The system can help determine who needs what training, allow admins to assign training and schedule training offerings, track offering registrants, and track which users have attempted/completed the training requirements.

In order to begin understanding the Learning Needs Management Model, it is important to learn some key terms and definitions that are associated with the model (Table 3).

Table 3. Learning Needs Management Model Terms and Definitions

Term	Definition
User	Any person for whom a database record has been created, including employees, contractors, and others for whom you wish to maintain learning records and to register in courses. Supervisors, Organization Owners, approvers, and Human Resource Business Partners (HRBPs) are all users.
Item	An assignable unit whose assignment and completion can be tracked. It may be learning or non-learning, optional or required, one-time or recurring (if assigned as part of a curriculum).
Curriculum	A group of one or more items (and/or requirements) that can be assigned to users and have its completion status tracked as a group.
Requirement (electives)	A choice of a pool of items or type of hours that a user may make. Assigned and tracked within a curriculum. Appears on the Learning Plan. Often referred to as a curriculum requirement.
Learning Plan	List of items assigned to a user that must be completed. It also contains the date by which each item should be completed.
Learning Event	A user's participation in the completion of an item or external event. For items, this record contains completion status, as well as the date of completion and other related information.
Learning History	A list of all recorded learning events for the user.

The Learning Needs Management Model (Figure 57) outlines the basic workflows surrounding the grouping of items, assigning items to a user's Learning Plan, and recording a completed learning event to be listed in the user's Learning History.

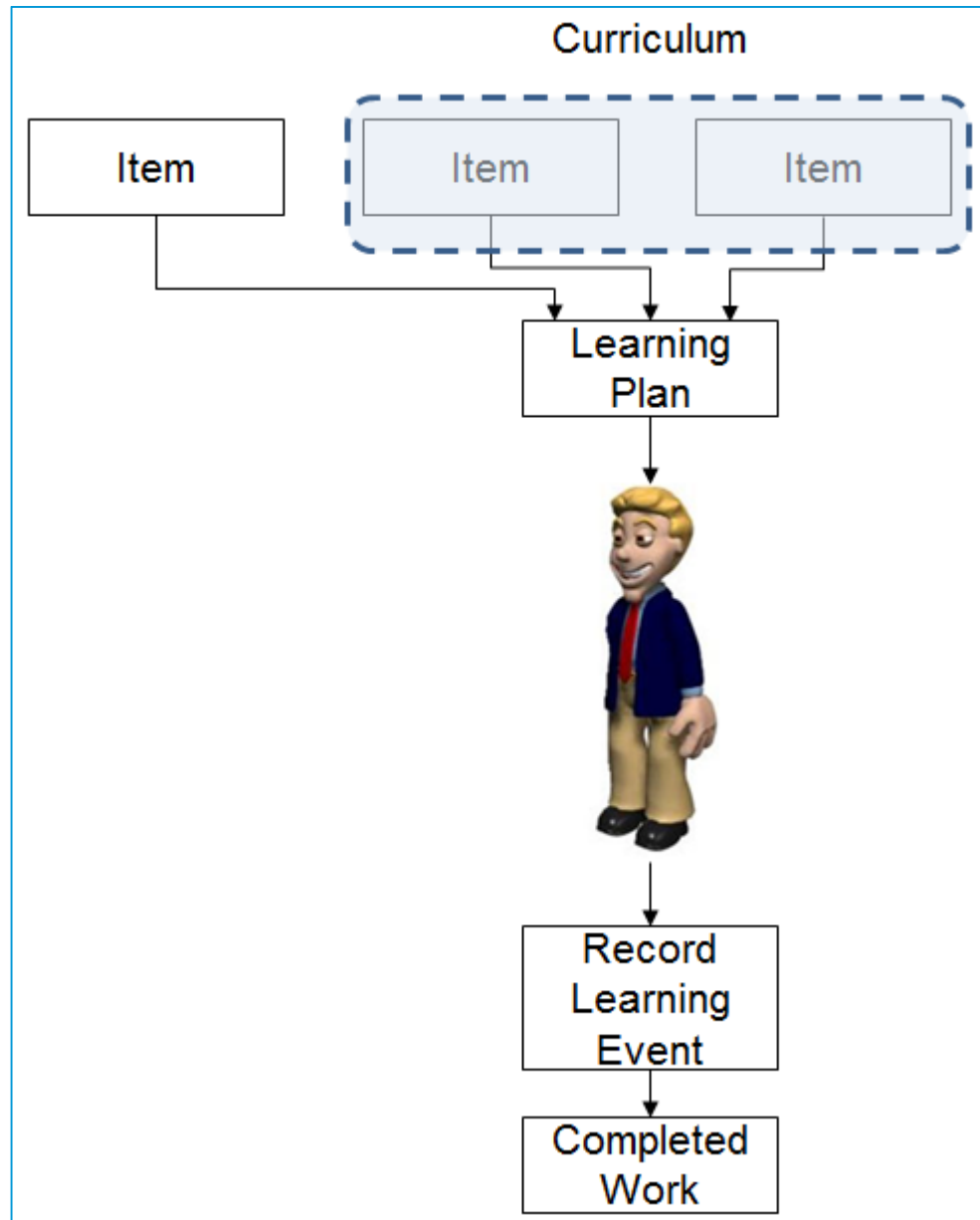


Figure 57. Learning Needs Management Model

Implementing the Learning Needs Management Model

The following steps should be followed to successfully implement the Learning Needs Management Model:

1. Identify learning needs (outside SuccessFactors Learning).
2. Add items in SuccessFactors Learning.
3. Add curricula in SuccessFactors Learning.
4. Assign learning needs to users.
5. Record learning events.

Figure 58 depicts the process required to implement the Learning Needs Management model.

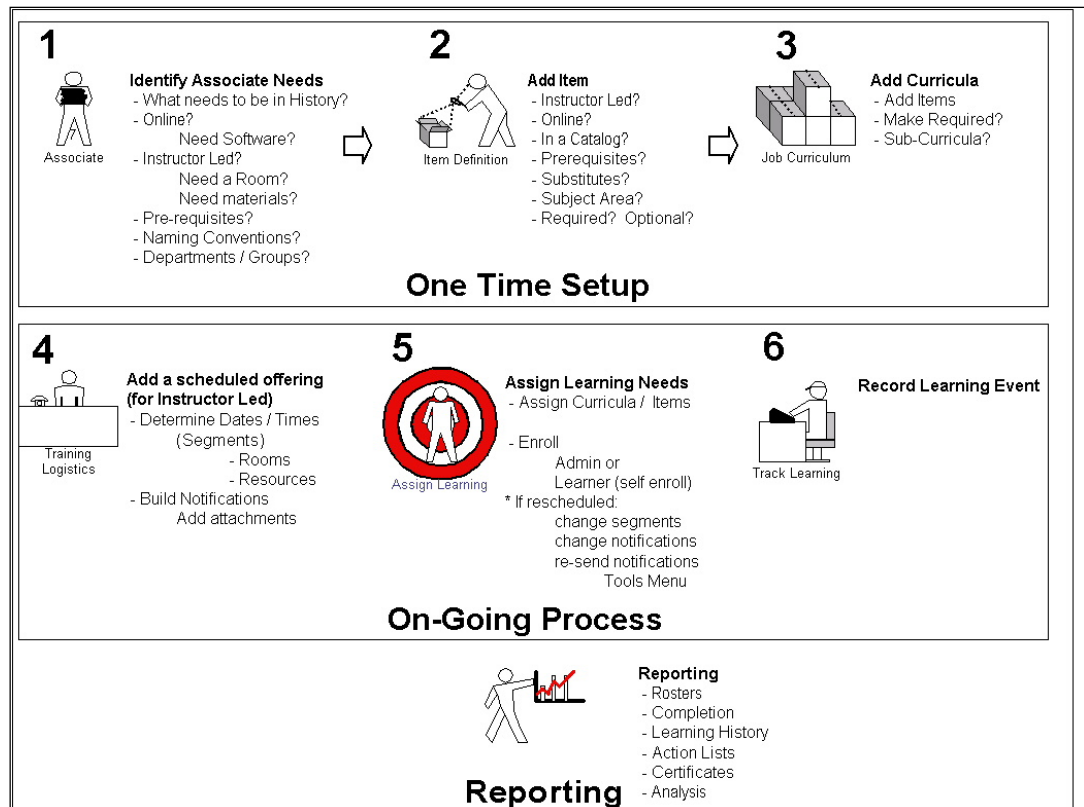


Figure 58. Implementing the Learning Needs Management Model



Job Aid: Introduction to Learning Needs Management

Conclusion

In this module, you were introduced to the Learning Needs Management Model and how it is implemented in SuccessFactors Learning. You also learned the terms and their definitions as they are used in the model.

You should now be able to:

- ▶ Describe the Learning Needs Management Model
- ▶ Explain the process of implementing the model
- ▶ Identify and define the terms associated with the model

Knowledge Check

Use what you learned in this module to answer the following questions.

1. Match the term in column A with its definition in Column B.

Column A	Column B
User	a. A group of one or more Items that can be assigned to users and have its completion status tracked as a group.
Item	b. A list of all recorded learning events for the user.
Curriculum	c. A list of items assigned to a user that must be completed. It also contains the date by which each item should be completed.
Learning Plan	d. A user's participation in the completion of an item or external event. For items, this record contains completion status, date, and other information.
Learning Event	e. An assignable unit whose assignment and completion can be tracked. It may be learning or non-learning, optional or required, one-time or recurring (if assigned as part of a curriculum).
Learning History	f. Any person for whom a database record has been created, including employees, contractors, and others for whom you wish to maintain learning records and to register in courses.

2. Put the following steps in order to successfully implement the Learning Needs Management Model in SuccessFactors Learning.

_____ Add curricula to SuccessFactors Learning.

_____ Assign learning needs to users.

_____ Add items to SuccessFactors Learning.

_____ Record learning events.

_____ Identify learning needs (outside SuccessFactors Learning).

Notes

Module 3. Working with User Records

SuccessFactors Learning is centered on the user and gives an admin the ability to identify the training that users have successfully accomplished, need to accomplish, or are in the process of completing. The goal of this module is to familiarize you with the attributes found in the user record.

Objectives

Upon completion of this module, you will be able to:

- ▶ Identify the characteristics of a user record
- ▶ Identify and describe the main tabs of the user record
- ▶ Access an existing user record
- ▶ Add and modify a user record

User Main Concepts

A user is any person in an organization for whom past, present, and future learning records must be tracked. A user may be an employee or a contractor. He/she has access to SuccessFactors Learning from the SuccessFactors Learning application to view his/her training information and, if identified as a supervisor or Human Resource Business Partner (HSBP), may view subordinate training information.

Main Areas of the User Record

The user record is divided into three main areas (Figure 59):

- ▶ Core (red outline at the top left) (also called the Summary Tab)
- ▶ Related (yellow outline at the bottom half)
- ▶ Actions (green outline at the top right)

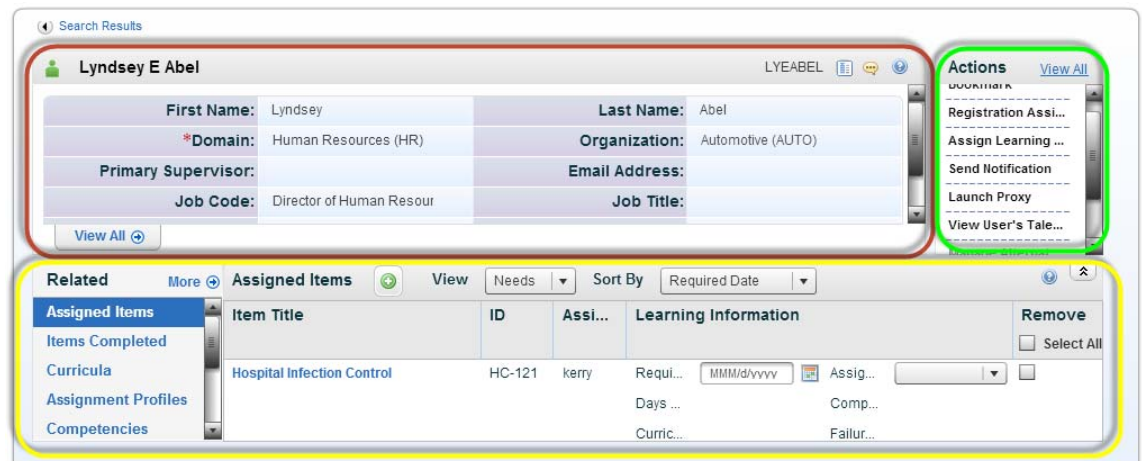


Figure 59. User Record

Core Area (Summary Tab)

The core area contains the basic information of the user record, including the user's name, position, email, organization, supervisor, and job code. To edit any field in this area, click in a displayed field and enter text or select a reference value (depending on the field type). You can also view and enter additional information by clicking **View All** located at the bottom left of the core area. Once expanded, the screen displays sections where updates can be made, including:

- ▶ Summary: name, position, domain, supervisor, job code, email, organization
- ▶ Extended Summary: active, role, coach, custom columns
- ▶ Employment: employment status, type, hire date, job location, job title, region, prior service time, related instructor, resume
- ▶ Reset Password: enter and confirm new password (for native login)

Related Area

The Related area of the user record contains additional tabs of information associated to the user (Figure 60).

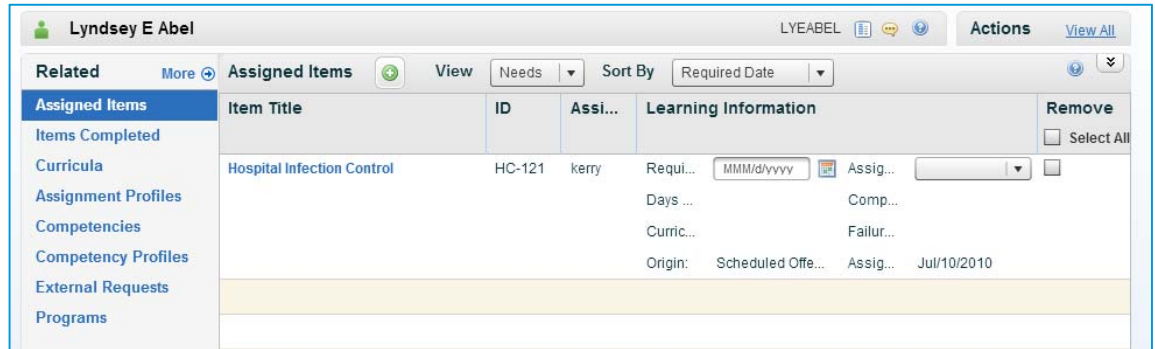


Figure 60. User Record > Related Area

The related area displays major tabs that administrators use when interacting with the user record. Select a Related tab on the left (i.e., Assigned Items) to display the details on the right. Click **More** to see additional Related tabs. The **More** link displays a list of items that administrators may be less likely to need regularly.



Note: There are global settings that determine which tabs and fields of the record configuration will be visible for major entities such as Users, Items, Curricula, Scheduled Offerings, Assignment Profiles, and Catalogs. Your specific instance of the LMS may not display the same tabs as those in our examples.

Table 4 provides a list and descriptions of the available Related tabs.

Table 4. Related Area Options and Descriptions: User Record

Option	Description
Assigned Items	The Assigned Items tab is used to assign items to a user's learning plan and manage a user's assigned items.
Items Completed	The Items Completed tab is a transcript of all the items a user has ever taken (also called the Learning History).

Option	Description
Curricula	The Curricula tab is used to assign curricula as well as manage all of the curricula that is assigned to the user, regardless of how the curricula was assigned.
Competency Profiles	Used only in legacy Plateau Performance, (not to be confused with SuccessFactors PM/GM) the Competency Profiles tab is used to associate a user with one or more competency profiles. When you associate a user with a competency profile, the system adds all of the competencies that are associated with that competency profile to the user's Competencies tab.
Competencies	Used only in legacy Plateau Performance, (not to be confused with SuccessFactors PM/GM) the Competencies tab is a list of all assigned competencies, regardless of how they were assigned (through a competency profile or as free-floating competencies).
External Requests	Requiring an add-on called SF-182 for U.S. Government customers, the External Requests tab is used to add, edit, approve, and withdraw the user's External Requests (a form used when users want to attend a training event that is not managed by SuccessFactors Learning).
Assignment Profiles	You can use the Assignment Profiles tab to review all of the assignment profiles that a user belongs to.

Available under More →	
Phone Numbers	The Phone Numbers tab is used to create or manage the different phone numbers that are associated with a user.
Registration	The Registration tab is used to view the user's scheduled offering registrations.
Requests	The Requests tab is used to view the requests that a user made from the user interface for instructor-led or blended items.
Online Status	The Online Status tab is used to review any of the items that 1) are assigned to the user's learning plan and 2) have online content, and 3) are currently in progress or outstanding (not completed)

Available under More →	
Assessments	The Assessments tab is used to track a user's progress and statistics regarding his or her competencies.
Commerce	The Commerce tab is used to edit the user's shopping account, billing, and shipping information.
Account Code	The Account Code tab is used to select an authorized account code to associate with a user so that the user can purchase items that have a price using the chargeback payment method.
Catalog Preview	The Catalog Preview tab lists all the catalogs that a user can access.
Preferences	The Preferences tab is used to set or change a user's time zone, currency, locale, and locale format options.
Approval Role	The Approval Role tab is used to associate the user with an approval role so that an administrator can assign the role to the user for an approval process.
Government Reporting	This tab can be used if you need to complete Declaration No. 2483 for reporting to the French government.
Approvals	Some items require that users receive approval before they gain access to the item. In these situations, users must request approvals, which administrators can review from the Approvals tab.
Organization Dashboard	The Organization Dashboard tab is used to manage a user's access to four standard charts for one or more organizations
Alternate Job Codes	The Alternate Job Code tab is used to add and edit alternative job codes (also called secondary job codes) that are associated with a user; you can find a user's primary job code in the Job Code box on the Summary tab (Core area).
Surveys	The Surveys tab is used to view information about surveys associated with the user and details for the items that are associated with each survey. When a user completes an item that is associated with a survey, SuccessFactors Administration adds the survey to this tab. When a user completes the survey, SuccessFactors Administration removes the survey from this tab.

Assigned Items Tab

The Assigned Items (or Learning Plan) tab (Figure 61) displays items assigned to the user individually or as part of a curriculum. The tab shows items not yet completed, and items completed but are part of a curriculum and need to be completed again (retraining). Admins can view the assignment type and required completion date for each assigned item. Admins may assign free-floating items directly to a user from this tab.

Item Title	ID	Assign...	Learning Information	Rem...
Microsoft Excel	IT-104	John H ...	Requi... Mar/18/2012 Days ... -1,139 Curric... MSOFFICE Origin: Curriculum	Assig... Required
Initial CPR Training	EHS-113	John H ...	Requi... Aug/31/2012 Days ... -973 Curric... Origin: Supervisor Ass...	Assig... Required

Figure 61. User Record: Assigned Items Tab

Items Completed Tab

The Items Completed (Learning History) tab (Figure 62) displays the list of items completed by the user. It also displays external events (such as a college courses or seminars outside of the organization or for which there isn't an item). Each learning event includes the completion status (*For Credit* and *Not for Credit completions of items*), completion date/time, and any other details (i.e., instructor, credit hours, and comments) entered when the learning event was recorded, as well as file attachments associated with the learning event.

Item Title	Status	Completion Date	Details
Managing Performance - Establishing a Perfo...	Attended Event or Activity	Apr/25/2005	View Details
Communicate for Contacts	Attended Event or Activity	Apr/11/2005	View Details
Interpersonal Communication Skills for Team...	Attended Event or Activity	Apr/19/2005	View Details
Writing with Intention	Attended Event or Activity	Apr/21/2005	View Details
Avoiding Errors in Usage and Punctuation	Attended Event or Activity	Apr/14/2005	View Details
Avoiding Grammatical Errors in Business Wri...	Attended Event or Activity	Apr/19/2005	View Details
What Is Emotional Intelligence?	Attended Event or Activity	Apr/11/2005	View Details
Teamwork and Emotional Intelligence	Attended Event or Activity	Apr/14/2005	View Details
Effective Presentation Delivery	Attended Event or Activity	Apr/7/2005	View Details

Figure 62. User Record: Learning History Tab

Curricula Tab

The Curricula tab (Figure 63) lists each curriculum that has been assigned to the user. Admins can view the status and details of each assigned curriculum, including individual item completion statuses and curriculum requirements, if any. Admins can also assign a curriculum to a user through this tab.

Assigned Items	Title	Status	Expirati...	Priority	Next Acti...	Assign Date	Add U...	Details	Remove
Items Completed		1							<input type="checkbox"/> Select All
Curricula	Field Operations Safety	Incomplete	N/A		Jun/15/2004	May/1/2015	Mastery...	Details	<input type="checkbox"/>
Assignment Profiles	Payroll	Incomplete	N/A		Feb/18/2005	May/1/2015	Mastery...	Details	<input type="checkbox"/>
Competencies	Workplace Safety	Incomplete	N/A		May/31/2015	May/1/2015	Mastery...	Details	<input type="checkbox"/>
Competency Profiles									
External Requests									
Programs									

Figure 63. User Record: Curricula Tab

Actions Area

The Actions area of the user record contains links to additional actions that can be taken on the user record, including (Figure 64):

- ▶ Bookmark (add the user to the admin bookmarks)
- ▶ Registration Assistant (initiates the Registration Assistant tool)
- ▶ Assign Learning Needs (initiates the User Needs Management tool to enable you to batch assign items and curricula to one or more users)
- ▶ Send Notification (initiates the ad hoc notification wizard)
- ▶ Launch Proxy (initiates proxy feature where an admin may become the user and perform most functions the user may do for him/herself or subordinates – except launching online items)
- ▶ Manage Alternate Supervisor (allows you to identify alternate supervisor for user)
- ▶ Reset User Pin (resets the user's pin)
- ▶ Copy User (opens the Copy User window that allows you to copy the user)
- ▶ Delete (deletes the user record)

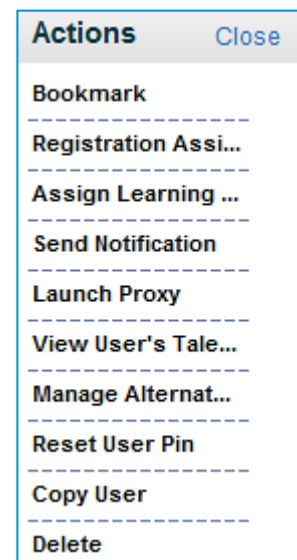


Figure 64. Actions Area of User Record



Note: Many of these actions are covered in either the **Learning Needs Management** course or the **Scheduling Management** course.

Adding Users to SuccessFactors Learning

Most users are added to SuccessFactors Learning as a result of a process called a connector. This will be configured globally to pull user records from SuccessFactors HCM (the SuccessFactors connector) or a third-party HR system (the User connector). Sometimes, however, you may need to create user records manually (for example, if they are not found in another system) or in other cases, users may be allowed to create their own user record by populating a form which requires an approval before the system adds the record.



Note: Reference the **Connectors Guide** for additional information on the standard connector framework.

If new user records are entered manually, follow your organization's business rules or establish a naming convention for user IDs to maintain consistency and usability. SuccessFactors Learning requires that each user record contain a unique user ID, which is used as the login ID for SuccessFactors Learning.

Examples of user IDs:

- ▶ KSMITH
- ▶ ksmith123
- ▶ 00129800

All user records are assigned to a domain. The domain is a way to show administrative ownership and determines which admin(s) will manage the user record. If the user's record is assigned to the "Public" (or Default) domain, the record will be editable by all admins who have the right to edit any user records in the system. When adding user records to SuccessFactors Learning, always specify the domain to which the user record should belong. All fields indicated with a red asterisk (*) are required by the system and must be completed when

adding records to SuccessFactors Learning (Figure 65). Additional fields may be made required through global configuration.

Users

> Add New

Add New User Information

* = Required Fields Add Reset

Security

- User ID:
- Active:
- Domain:
- Role:

Personal

- Last:
- First:
- MI:
- Upload Picture File: Browse...

Pictures display in 4:5 aspect ratio (140 x 175 pixels)

Employment

- Job Title:
- Job Code:
- Job Location: +
- Emp Type: +
- Emp Status: +
- Region:
- Prior Years of Service: Years Month(s)
- Hired: (MM/DD/YYYY)
- Related Instructor: +

Address

- Email Address:

Add Reset

Figure 65. Adding a New User Record



Exercise 1: Locate and View a User Record

In this lab, you will locate and view a user record.

1. Navigate to **Users > Users**.
2. Enter your search criteria in the appropriate textboxes.
3. Click **Search**.
4. Locate your user from the search results list.
5. Click a user ID to open the record.



Job Aid: Add and Edit User Records



Exercise 2: Add a User Record

In this lab, you will add a user record.

1. Navigate to **Users > Users**.
2. Click **Add New**.
3. In the Security section:
 - a) Enter a user ID.
 - b) Ensure the Active checkbox is checked.
 - c) Select a domain for the user.
 - d) Select a role for the user from the drop-down menu.
4. Enter optional information in the Personal section:
 - a) Enter the user's last name
 - b) Enter the user's first name.
 - c) Enter the user's middle initial.
5. Enter optional information in the Organization section:
 - a) Search for and select an organization.
 - b) Search for and select the user's supervisor.
6. Enter optional information in the Employment section:
 - a) Enter the user's job title.
 - b) Search for and select a job code.
 - c) Select a job location.

- d) Select an employee type.
 - e) Select the employee status.
 - f) Select the employee's region.
 - g) Enter the number of years/months of prior service.
 - h) Enter the location of the user's resume.
 - i) Enter a hired date.
 - j) Select a related instructor, if applicable.
7. In the Address section, enter an e-mail address for the user.
8. Click **Add**.
9. Record the user ID.



Job Aid: Add and Edit User Records



Activity

Make the user you created in Exercise 2 a subordinate of the user indicated by your instructor. As a group, determine where that information goes on the Summary tab (Core area), select the user's supervisor, and click **Apply Changes**.

Conclusion

In this module, you were introduced to user records along with the key information contained within each record. Step-by-step instructions were provided for viewing and adding a user record to SuccessFactors Learning. Additionally, the instructor demonstrated how to create the supervisor-subordinate relationship.

You should now be able to:

- ▶ Identify the characteristics of a user record
- ▶ Identify and describe the main sections of the user record
- ▶ Access an existing user record
- ▶ Add and modify a user record

Knowledge Check

Use what you learned in this module to answer the following questions.

1. Which of the following is not a system-required field in the user record?

- a) User ID
- b) Email address
- c) Domain
- d) Role
- e) None of the above

2. What information is found on the Assigned Items tab?

3. True or false: The Items Completed tab displays those items a user has completed including the date those items were completed.

Module 4. Navigating the User Interface – Overview

A **user** is considered the end user of SuccessFactors Learning. Users include supervisors, instructors, Human Resource Business Partners (HRBPs), and organization owners. This module will provide an overview of navigating the user interface.

Objectives

Upon completion of this module, you will be able to:

- ▶ Describe the main tiles of the user interface
- ▶ Identify and describe the links of the user interface
- ▶ Explain supervisor functionality
- ▶ Explain instructor functionality
- ▶ Access user reports

Accessing SuccessFactors Learning as a User

From within SuccessFactors HCM, users may access the user interface of SuccessFactors Learning by selecting the Learning option from the drop-down Home menu (Figure 66).

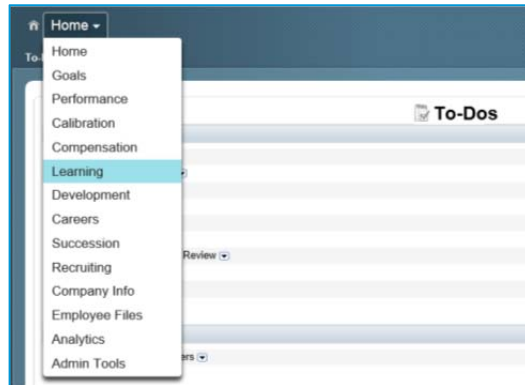


Figure 66. Home > Learning

Learning Home Page

Learning contains the My Learning Assignments (or Learning Plan) tile and other tiles including My Employees (if the user is also a supervisor) (Figure 67).

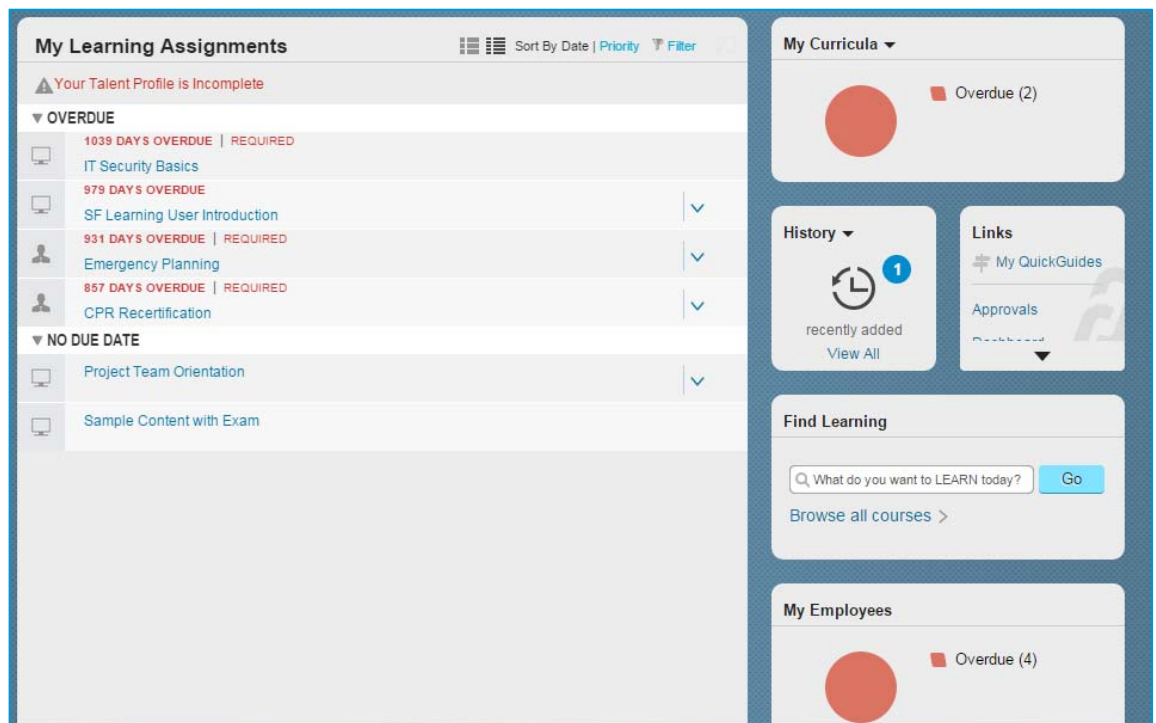


Figure 67. Learning Home Page

Additional tiles include: My Curricula, History (Learning History), Links, Find Learning (Catalog), Recommended, Featured, and Bookmarks. If custom tiles have been created, they may be available to users in certain organizations.

My Learning Assignments

My Learning Assignments (Figure 68) displays a list of the things the user needs to take action on, grouped by the due dates. This is also called the Learning Plan. My Learning Assignments displays item titles, item numbers, priority, and when each item is due. It also shows curriculum requirements, start date and information for enrollments, and actions that the user may perform. Clicking a title will display more detailed information about each record in the list, such as how it was assigned and by whom and what actions the user may take.

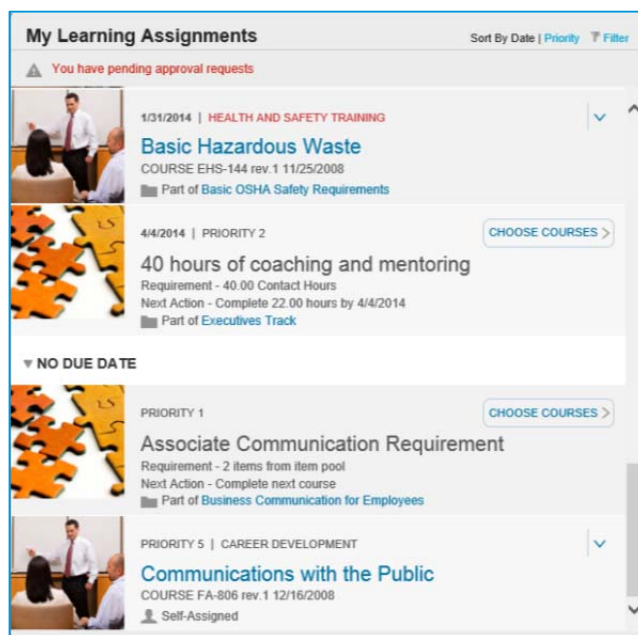


Figure 68. My Learning Assignments

Find Learning (Catalog)

The Find Learning tile (Figure 69) allows users to enter keywords to perform a quick search for items, curricula, programs, quick guides, and scheduled offerings in the catalog.

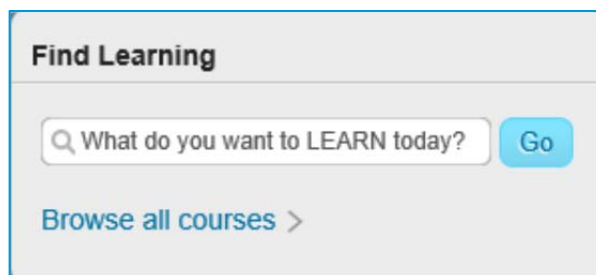


Figure 69. Find Learning Tile

Additionally, the user may browse the catalog by subject area (Figure 70).

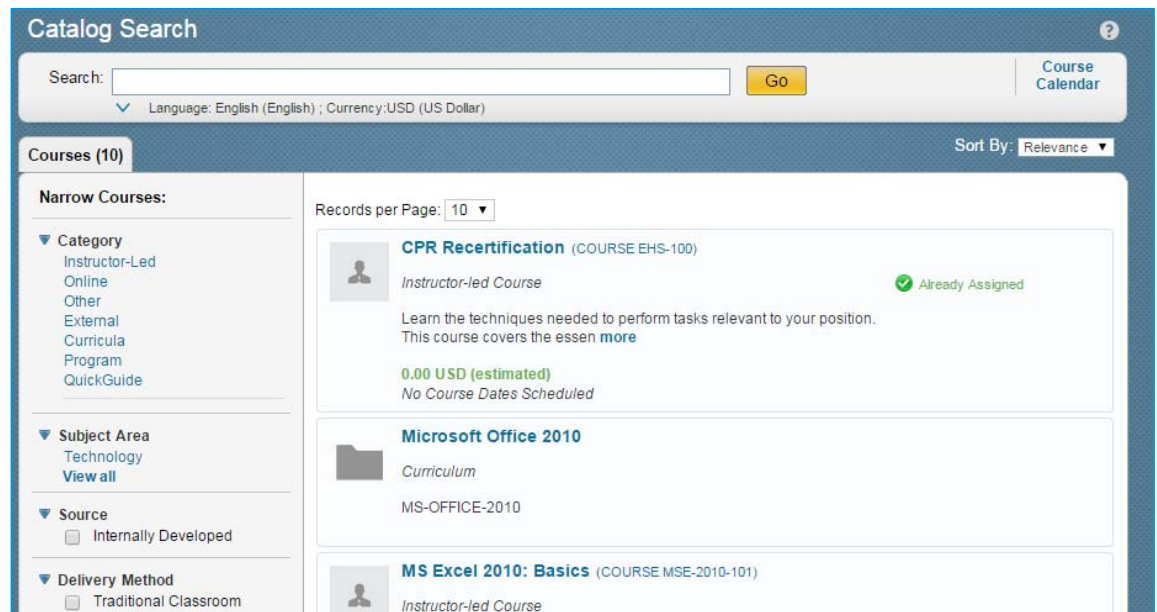


Figure 70. Catalog Search by Subject Area

Other options users can take include (Figure 71):

- ▶ The user may filter the search by category, subject area, source, delivery method, or average rating. If the Open Content Network is configured, sources such as Coursera, Lynda, Open Sesame, Open HPI, or Udacity may display.
- ▶ The results may be sorted by relevance, rating, title, price, or tier.
- ▶ When searching for scheduled offerings, the user may also filter by date range and location (Facility).
- ▶ A user may self-assign items and curricula from the catalog by using the **Assign to Me** button and may self-register or waitlist for scheduled offerings (as permitted).
- ▶ If the user does not see a scheduled offering that meets their needs, they may request that additional ones be scheduled for an item by using the **Request Schedule** button.
- ▶ If allowed, users may recommend items and other things in their catalog to other users (who also have them in their own catalog) by using the **Recommend** button.

Note: Actions a user may perform (as well as tiles and links the user may see) are determined by workflows in the role assigned to the user.

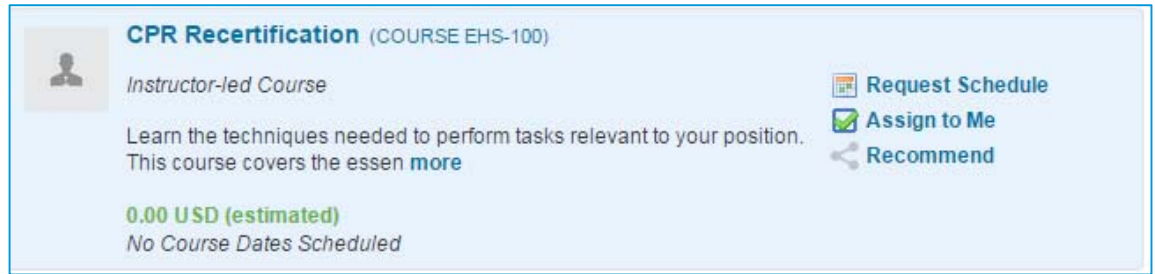


Figure 71. Item Options

Users who are supervisors may assign items and curricula to others (their subordinates). If permitted, they may register their subordinates into scheduled offerings from their catalog.

Recommendations

The Recommendations tile (Figure 72) provides users with a graphic display of recommendations from either their peers or administrators:

- ▶ Peer recommendations may include items, curricula, or programs that their peers found in the catalog or were assigned to them.
- ▶ Admins may add Recommended Items to an assignment profile so they will display here for all users who meet a certain criteria.
- ▶ Admins may create external links and recommend them to a group of users.

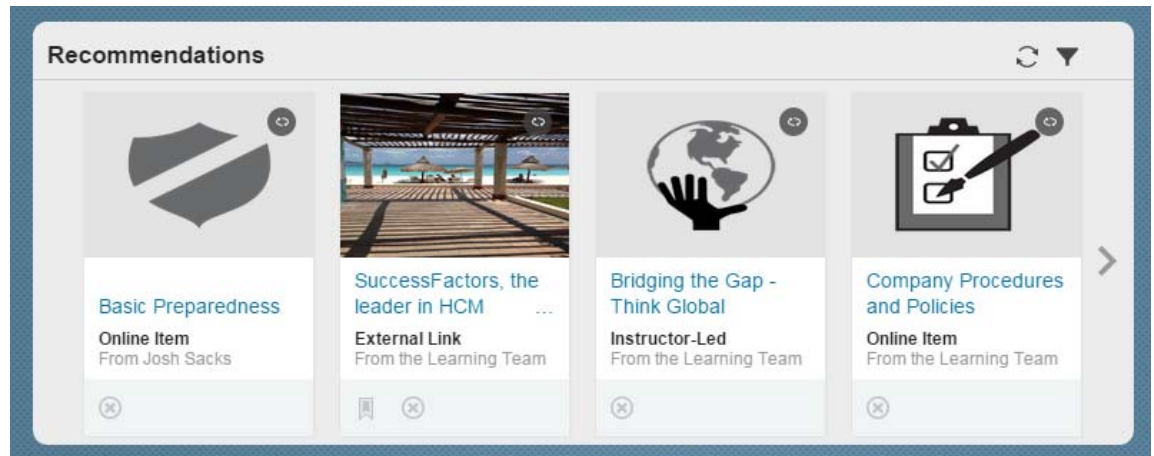


Figure 72. Recommendations Tile

Links

The Links tile (Figure 73) provides access to additional screens and functionality such as My QuickGuides, Approvals, External Requests, (for Government customers) My Orders, News, Options and Settings, Record Learning, Reports, and Training Planner. If configured, custom links to internal/external web pages (called Easy Links) may be available. The specific list that users see depends on their user role (list of permissions).



Figure 73. Links Tile

History

The History tile opens the Completed Work (Figure 74) page (also called Learning History) which allows users to view learning events in their history and sort or search particular events by title or date. Clicking a title displays more information about each event.

Completed Work

Show Completions: After Find

Completion Date *	Title	Status
5/18/2015 04:00 PM	Effective Administrative Support Professional Simulation	Course Complete
1/14/2012 03:35 PM	CPR Recertification	Course Complete
7/23/2011 03:47 PM	CPR Recertification	Course Complete
7/16/2011 03:49 PM	IT Security Basics	Document Read
1/20/2011 03:35 PM	Medical Services & First Aid	Course Complete
1/19/2011 03:35 PM	Initial CPR Training	Course Complete
12/15/2008 04:06 PM	Basic Accounting	Course Waived
12/11/2008 03:41 PM	HR Handbook	Document Read
12/10/2008 03:41 PM	IT Security Basics	Document Read
12/10/2008 03:41 PM	New Employee Orientation	Course Complete

10 Items * All dates are for America/Chicago time zone.

Figure 74. Completed Work

My Curricula

The My Curricula tile opens the Curriculum Status page (Figure 75) with a list of all the curricula that are currently assigned to the user and the status of each. For detailed information, the user may click the title of any curriculum.

Curriculum Status

This page includes a list of curricula that have been assigned to you. Each curriculum title links to the Curriculum Details page which includes a list of the curriculum's items and Action drop-down menus where you can register for or request items. On this page you can also view the sub-curricula associated with each curriculum and access information on items as well.

Curriculum Title	Priority	Next Action Date ▲	Expiration Date	Assigned By	Remove
New Employee Orientation	N/A	7/15/2012	N/A	Admin (System AP)	
First Aid and CPR	N/A	1/13/2013	N/A	Admin (PLATEAU ADMIN)	
Payroll	N/A	N/A	N/A	Admin (PLATEAU ADMIN)	
SF Learning User Tutorial	N/A	N/A	N/A	Admin (System AP)	

Figure 75. Curriculum Status

Supervisors

Users who are also supervisors will have access the My Employees tile. On the My Employees screen, a supervisor may:

- ▶ Click the name of one of the subordinate users and view the Learning Plan
- ▶ Click the arrow next to a subordinate who is also a supervisor and see the users who report him or her and view their Learning Plans
- ▶ Browse the catalog and assign or recommend learning to subordinates
- ▶ View the curricula of each user and their statuses
- ▶ Use the Supervisor Links to:
 - Assign/Remove Learning
 - Record Learning
 - Register/Withdraw Employees
 - Approvals
 - Dashboard
 - Organization Chart
 - Reports

The specific links and tiles that supervisors see depend on their user role.

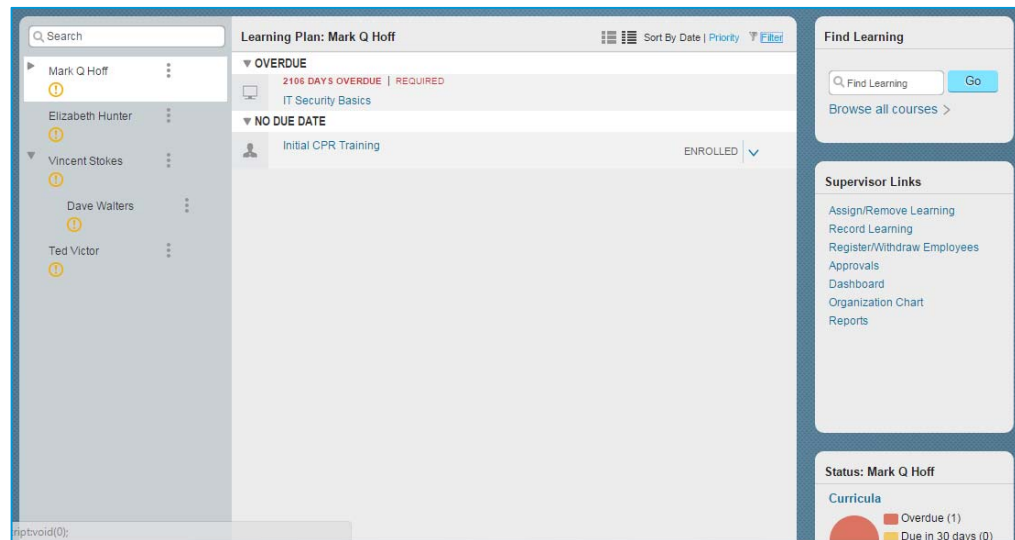


Figure 76. My Employees Screen

A supervisor may usually remove things that the user has self-assigned (or self-registered into) but may not remove things assigned by an administrator.

When supervisors run reports, they may choose to run each report for just their own data, all of their direct subordinates, all subordinates (indirect included), or all subordinates including their own data.

Instructors

Users, who are also identified as instructors in SuccessFactors Learning, will have access the **My Classes** tile (Figure 77), where they may:

- ▶ View their scheduled courses
- ▶ View details on a selected course
- ▶ View students who have registered for the course
- ▶ Communicate with students via email.
- ▶ Record completion for the course
- ▶ Launch virtual sessions
- ▶ View segment details

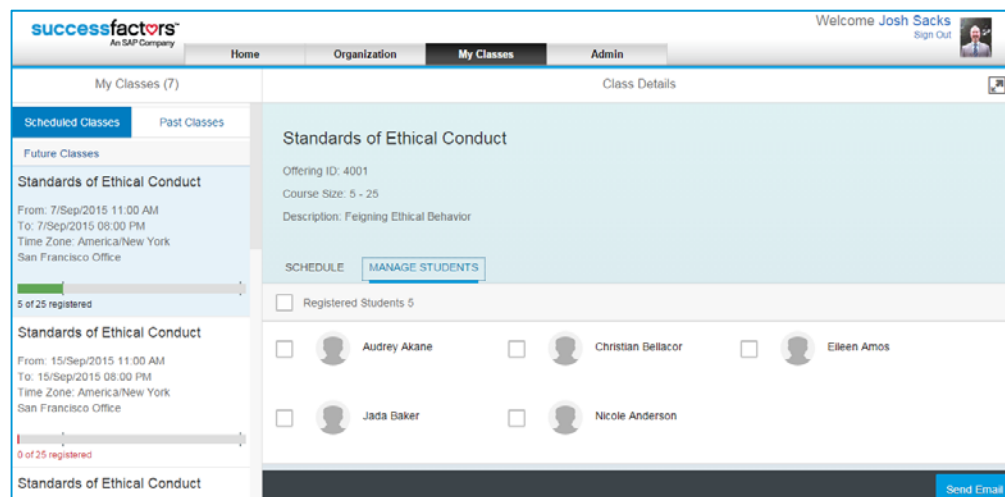


Figure 77. My Classes Screen

User Reports

User reports are run from the Reports link on the Links tile (Figure 78). Users, who are not also supervisors or a Human Resources Business Partners (HRBPs), may only run reports on their own history or assignments.

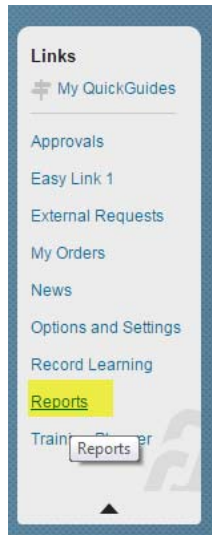
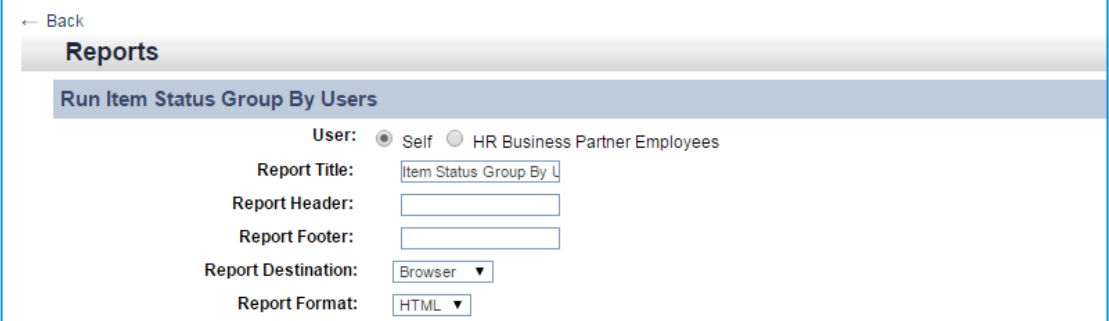


Figure 78. Links Tile

Supervisors may choose to run the report for **Self**, **Direct Subordinates**, **All Subordinates**, or **All** (everyone including themselves) (Figure 79).

Figure 79. Supervisor Report Options

HRBPs may choose to run reports for **Self** or their **HR Business Partner Employees** (Figure 80).



The screenshot shows a web-based configuration interface for a report. At the top left, there is a 'Back' link. The main heading is 'Reports', followed by a sub-heading 'Run Item Status Group By Users'. Below this, there are several configuration options: 'User' with radio buttons for 'Self' (selected) and 'HR Business Partner Employees'; 'Report Title' with a text input field containing 'Item Status Group By U'; 'Report Header' with an empty text input field; 'Report Footer' with an empty text input field; 'Report Destination' with a dropdown menu set to 'Browser'; and 'Report Format' with a dropdown menu set to 'HTML'.

Figure 80. HRBP Report Options

Conclusion

In this module, you were introduced to the user interface.

You should now be able to:

- ▶ Describe the main tiles of the user interface
- ▶ Identify and describe the links of the user interface
- ▶ Explain supervisor functionality
- ▶ Explain instructor functionality
- ▶ Access user reports

Knowledge Check

Use what you learned in this module to answer the following questions.

1. True or false: Approvals and Reports are two tiles that are found on the Learning Home Page

2. A supervisor may view the Learning Plans of:
 - a) Their direct subordinates
 - b) Their direct and indirect subordinates
 - c) Their peers

3. When a user finds an item in a catalog he or she may do all of the following EXCEPT:
 - a) Remove the item from the catalog
 - b) Assign the item to subordinates (if he or she is a supervisor)
 - c) Self-Assign the item
 - d) Recommend the item

Course Summary

Through discussion, demonstration, and hands-on computer lab work, this course taught you the concepts and terminology associated with SuccessFactors Learning. You were introduced to searching and navigation, and adding and modifying users in SuccessFactors Learning. You also gained basic skills on how to create and modify user records using the step-by-step, hands-on lab exercises.

You should now be able to:

- ▶ Identify features of SuccessFactors Learning
- ▶ Identify and use the search functions
- ▶ Define specific terms associated with the Learning Needs Management model
- ▶ Add, view, and modify user records
- ▶ Navigate the SuccessFactors Learning user interface

After completing Appendix A, you will also be able to create, run, and save reoccurring reports (optional).

Notes

Appendix A: Running, Saving, and Creating Recurring Reports

A priority for many administrators (admins) is to be able to run detailed reports. The overall goal of this Reports appendix is to provide you with the knowledge needed to use the SuccessFactors Learning report interface to run, save, and create recurring report jobs.

Becoming Familiar with the Report Interface

SuccessFactors Learning is accessed either as an admin or as a user. Admins are able to run reports on users they have access to, which is determined by the domain restrictions applied to their admin accounts. Users, on the other hand, are only able to run reports on themselves; however, if the user is listed as a supervisor in SuccessFactors Learning, that user is able to run a report on him/herself and any of his/her direct or indirect subordinates. The SuccessFactors report interface is broken down into three main tabs:

- ▶ Saved Reports
- ▶ Reports
- ▶ Report Jobs

Reports

The most common use of the Reports tab (Figure 81) is to run available reports within the system. To find the desired report, browse the provided list under the Reports tab or use the **Search** textbox and **Browse By** options on the left side of the report interface to search for reports by the title or description. To further assist in the search for a desired report, narrow the search results by checking the corresponding checkbox in the left hand corner to select very specific categories of reports.

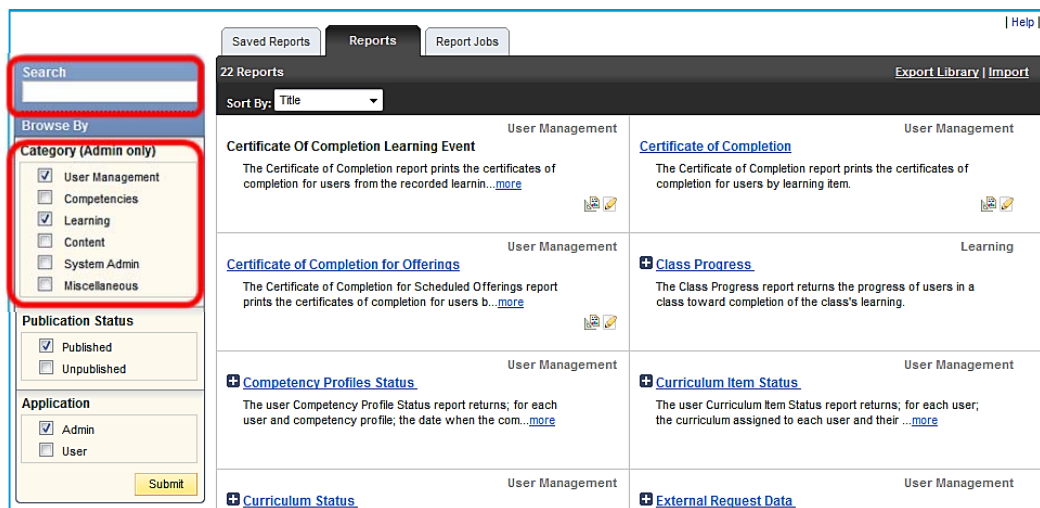


Figure 81. Reports Tab

Depending on your security privileges, you may also perform advanced report tasks from the Reports tab, such as changing the description of reports, importing and exporting reports and libraries for customization in Report Designer, and publishing and un-publishing reports. The functions that you are able to perform in the reports section are controlled by report workflows given to you by the system administrator.

Saved Reports

Once you create a saved report, you can access the report and run it without reentering filtering options. Saved reports are located under the Saved Reports tab (Figure 82), and are specific to your admin account, meaning that saved reports are not shared among admins in the system. A saved report is very similar to a saved search in SuccessFactors Learning – only the admin who created the saved report is able to see it.

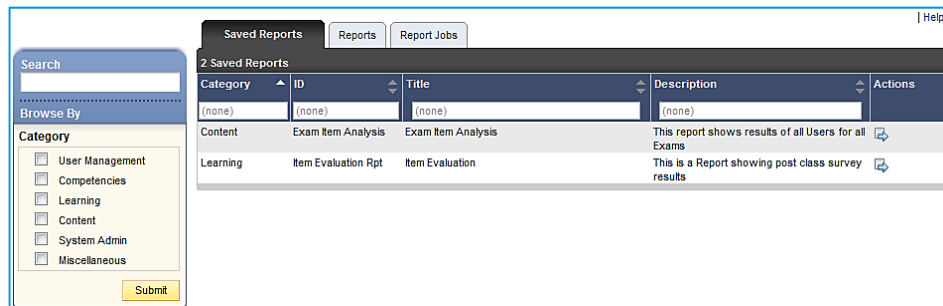


Figure 82. Saved Reports Tab

Report Jobs

The Report Jobs tab lists the current background report jobs which are automatically running in the background (Figure 83). Jobs are created under this tab when you schedule the report to occur on a recurring basis. On this tab, you can delete jobs from recurring or edit the schedule of when the report should run.



Note: Reports that are scheduled to run only once display under **System Admin > Background Jobs**.

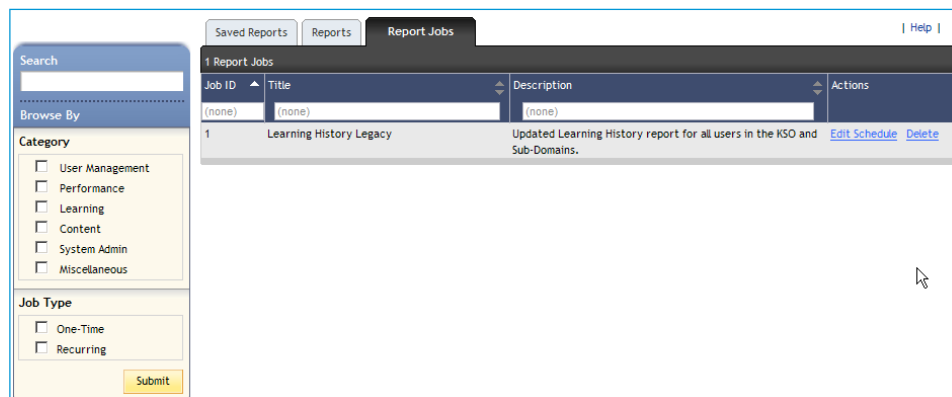


Figure 83. Report Jobs Tab

Identifying the Reports Sections

Each report is divided into two main sections: formatting and criteria.

Formatting

The top section of the Run Report screen contains the following formatting options (Figure 84):

- ▶ Modify the report title, header, and footer.
- ▶ Determine the report destination (the location where the report engine returns the data). You can return the data to the browser or to a local file. When you select Browser, the report is displayed in the internet browser window. When Local File is selected, you must save the report to a local drive before you are able to open it.
- ▶ Determine the report format. Table 5 lists the available report formats and their usage.

The screenshot shows the 'Run Report' screen for a report titled 'Learning History'. The interface includes a breadcrumb trail '> Run Report' and a sub-header 'Run Learning History'. Below this, there are five input fields for formatting options:

- Report Title:** A text box containing 'Learning History'.
- Report Header:** An empty text box.
- Report Footer:** An empty text box.
- Report Destination:** A dropdown menu currently set to 'Browser'.
- Report Format:** A dropdown menu currently set to 'HTML'.

In the top right corner of the screen, there are links for 'Browse' and 'Help'.

Figure 84. Run Report Screen: Formatting Options

Table 5. Available Report Formats and Usage

Format	Usage
XML – rarely used (May not be available for all reports)	Import the data into a database and for troubleshooting a report.
CSV	Open the data in a spreadsheet format, in an application like Microsoft Excel, or import data into a database, such as Microsoft Access.
HTML	View results quickly in a browser window.
PDF	Print, save, and email the report.

Criteria

The selected report dictates the criteria displayed at the bottom of the Run Report screen. This section provides all the tools and functionality from searching. Report pages filter the data that the report returns using specific search fields; however, many reports also contain the following controls for filtering the data that you want to return:

- ▶ **Mask User IDs:** For security reasons, the system can mask the user IDs so it displays as a series of asterisks. Check the checkbox to hide user IDs.
- ▶ **Case Sensitive Search:** You can choose to perform a case-sensitive search or a case-insensitive search. Case-sensitive searches return data elements only when the characters and case match. Case-sensitive reports run faster than case-insensitive searches.
- ▶ **Page Break Between Records:** For longer reports, there is an option to insert page breaks between records.
- ▶ **Filter by Criteria:** Some fields in the report pages contain a Filter by Criteria link. When you click the link, a page opens that contains multiple search fields in which you can select a set of data rather than a single data element. For example, you can return the set of users who are in the job location Washington, DC rather than entering multiple users in the search field (Figure 85).

Mask User IDs
Case sensitive search: Yes No
 Page Break Between Records
User: Exact
User Status: Active Not Active Both
Completed Date From: (MM/DD/YYYY)
Completed Date To: (MM/DD/YYYY)
Report Type: Summary Detail
Include: Item Events External Events Both
Print Comments: Yes No
Sort Items: Completion Date Item ID

Figure 85. Run Report Screen: Criteria Options


Submit Filter Information as Criteria

If you are saving a report to be run at a later time or scheduling a report to run on a recurring basis you may want the report to dynamically update the search filters. In this situation, you must save the criteria of the search instead of selecting results.

For example, Chase wants to run a report on all of Marcus Hoff's subordinates. Chase filters the user search using Marcus Hoff as the supervisor, and then selects all of his subordinate IDs to the filter. By doing this, Chase is selecting actual users to include on the report.

What happens if Marcus is assigned another subordinate next week? Chase would have to search again and add the new subordinate to the filter in order to include him/her on the report. An easier method, and one especially useful if you are going to save the report and run it later or set the report to recur, would be to submit Marcus Hoff's information as criteria.

Creating search filters in reports determines the contents of your results by listing only entities that satisfy all the criteria specified by the filter(s) created. For example, in this case we want to run a Learning History Report for all users who report to Marcus Hoff. You must specify the supervisor(s) in the user filter and apply that filter as criteria in order for the report to be dynamic.

1. Access the **Learning History Report**.
2. Click the **Filter by criteria icon** () next to the user criteria.
3. If necessary, click **Add/Remove Criteria** to add the supervisor search filter to the search screen to display the Search Criteria pop-up window (Figure 86).

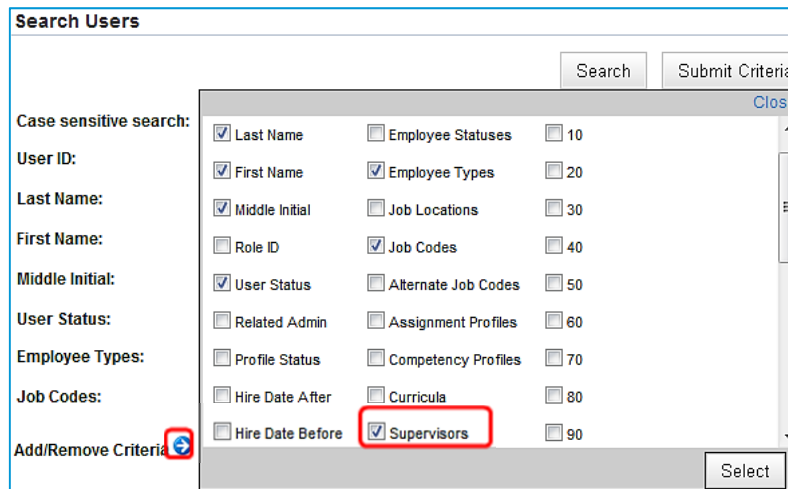


Figure 86. Search Criteria Pop-up Window

4. Select the **Supervisors** checkbox and click **Select**.
The Supervisor search query displays (Figure 87).

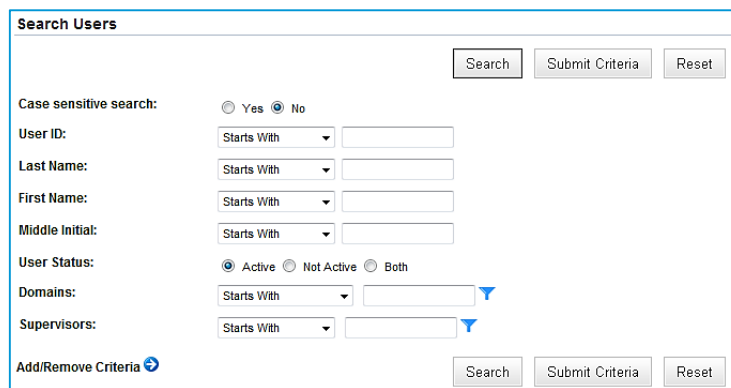


Figure 87. Selected Search Query Displays

- To create the filter, click the **Filter by criteria icon** ().

The Create Filter by Supervisor screen displays (Figure 88).

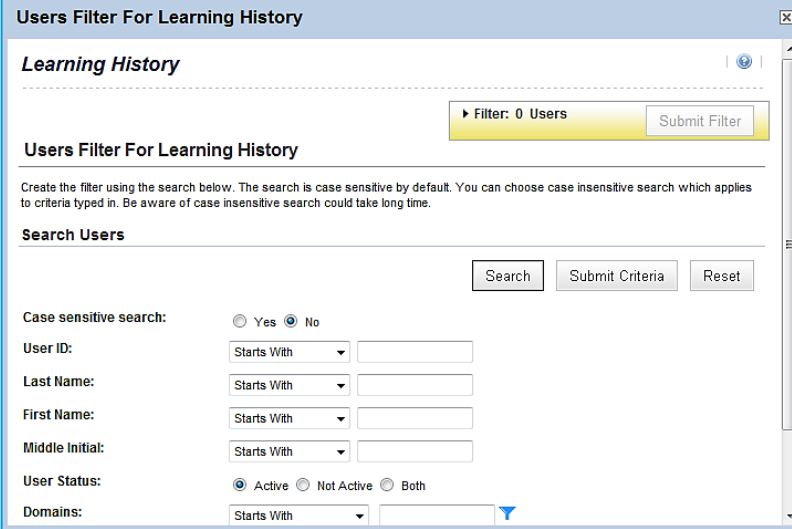
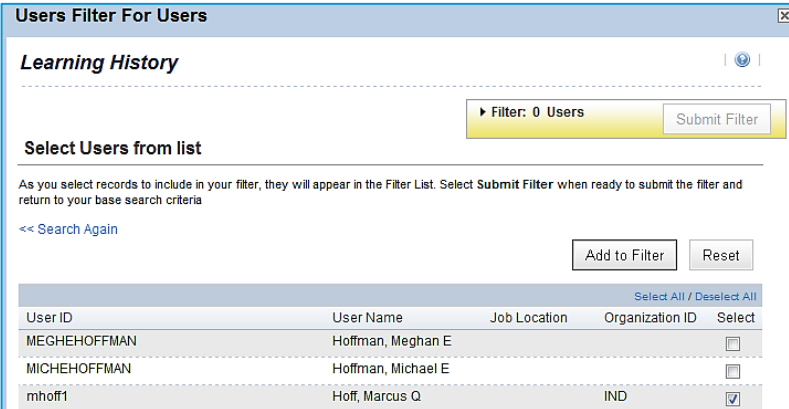


Figure 88. Create Filter Screen

- If you don't know the supervisor's ID, enter search criteria in the *Last Name* and *First Name* textboxes.

- Click **Search**.

Your search results are displayed (Figure 89).



User ID	User Name	Job Location	Organization ID	Select
MEGHEHOFFMAN	Hoffman, Meghan E			<input type="checkbox"/>
MICHEHOFFMAN	Hoffman, Michael E			<input type="checkbox"/>
mhoff1	Hoff, Marcus Q		IND	<input checked="" type="checkbox"/>

Figure 89. Search Results

- Select the checkbox(es) to select your choice(s).

9. Click **Add to Filter**.

The criteria are added to the filter (Figure 90).

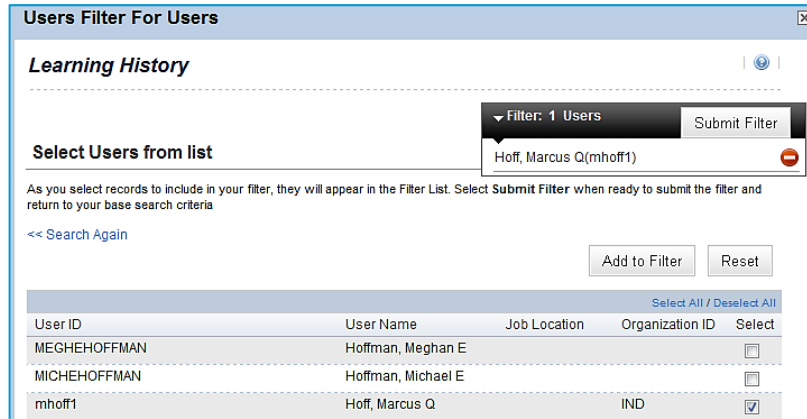


Figure 90. Criteria added to filter

10. Click **Submit Filter**.

You are returned to your original search screen. The supervisor search attribute has one (1) criteria selected for this filter (Figure 91).

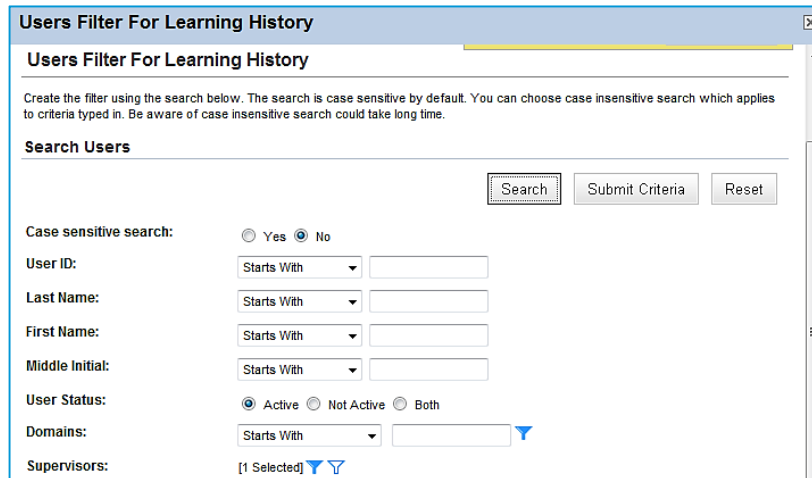


Figure 91. Search Filter Criteria Selection

11. You can modify this filter by clicking the **Filter by criteria icon** (), or you can clear the filter by clicking the **Clear Filter icon** ().

12. Click **Submit Criteria** to submit Marcus Hoff as criteria making the search dynamic.

You are returned to the original report screen, with a supervisor submitted as criteria (Figure 92). Now, if the subordinate assignment changes, the system automatically updates the search filter of this report, and runs a Learning History report on all users who report to Marcus Hoff at the time the report is ran, especially if the report is saved or scheduled to recur.

Learning History | Browse | Help

> Run Report

Run Learning History

Report Title: Learning History

Report Header:

Report Footer:

Report Destination: Browser

Report Format: HTML

Mask User IDs

Case sensitive search: Yes No

Page Break Between Records

User: [Criteria Specified]

User Status: Active Not Active Both

Completed Date From: (MM/DD/YYYY)

Completed Date To: (MM/DD/YYYY)

Report Type: Summary Detail

Include: Item Events External Events Both

Print Comments: Yes No

Sort Items: Completion Date Item ID

Run Report | Schedule Job | Save Report | Reset

Figure 92. Report Criteria Specified

Running Reports in SuccessFactors Learning

Once logged into SuccessFactors Learning, navigate to the Reports menu then select the **Reports** tab. Access the report you wish to run by clicking the report title. You should notice that the titles of reports are links. Each report is different based on the data it is requesting, and returns different data elements.

To run a report:

1. Find the report you want to run. Use the *Search* textbox to look for reports by title or description, or browse the reports in the provided list. Select the proper category to narrow your search results. Read the provided report descriptions to verify it is the report you want to run.
2. If the report is a member of a report group (reports that run the same query but whose results are grouped differently), click the *expand icon* (⊕) to the left of the report title to expand the group and see the reports that are part of the group.
3. When you find the report that you wish to run, click its title to open the Run Report form.
4. Complete the Run Report form to provide the report with the information that it needs to return the data you wish to display.
5. After formatting and criteria options have been determined, click **Run Report** to run the report immediately in the format you choose. If you selected **Browser**, the report displays in a separate browser window. If **Local File** was selected, you must first save the file to a local drive before you are able to open it.
6. Administrators need to be aware that if you leave all filtering options blank, you could overburden the system. If the admin leaves all criteria blank, the admin receives a warning message (Figure 93), informing the admin that it may be better to schedule the non-filtered report to be run in the background or return the admin to the filter screen to apply one or more filters to the report.

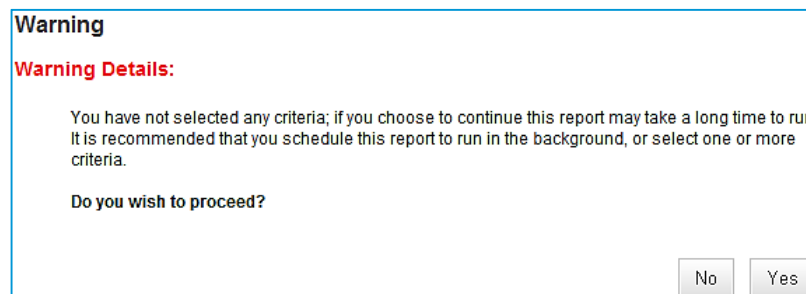


Figure 93. Warning Details

7. Depending on your security privileges as an admin, you may not see all of the following buttons (Figure 94). Click:
- **Run Report** to run the report immediately.
 - **Save Report** to save the report to be run later at any desired time.
 - **Schedule Job** to schedule the report to run in one of three ways: as a background job to be run immediately, once at a future time, or on a recurring basis.

The screenshot shows a web interface for the 'Scheduled Offering Roster' report. The title bar includes 'Browse' and 'Help' links. Below the title, there is a breadcrumb '> Run Report'. The main heading is 'Run Scheduled Offering Roster'. The form contains the following fields and controls:

- Report Title:** A text input field containing 'Scheduled Offering f'.
- Report Header:** An empty text input field.
- Report Footer:** An empty text input field.
- Report Destination:** A dropdown menu set to 'Browser'.
- Report Format:** A dropdown menu set to 'HTML'.
- Scheduled Offering:** A dropdown menu set to 'Exact' followed by an empty search input field with a blue search icon.
- Mask User IDs:** A checked checkbox.

At the bottom of the form are four buttons: 'Run Report', 'Schedule Job', 'Save Report', and 'Reset'.

Figure 94. Report Parameters

Examples of Commonly Run Reports

Some of the most commonly run reports in SuccessFactors include:

- ▶ Scheduled Offering Roster report
- ▶ Learning History report

This section provides the details on how to run these two reports.

Scheduled Offering Roster Report

One report that many admins run is the Scheduled Offering Roster report. The Scheduled Offering Roster report returns: scheduled offering details including item title, segment dates/times, instructor, location, and users with confirmed enrollments.

To run the Schedule Offering Roster report:

1. Navigate to **Reports**.
2. Enter **Roster** in the Search textbox.
3. Check the **Learning** category checkbox (Figure 95).

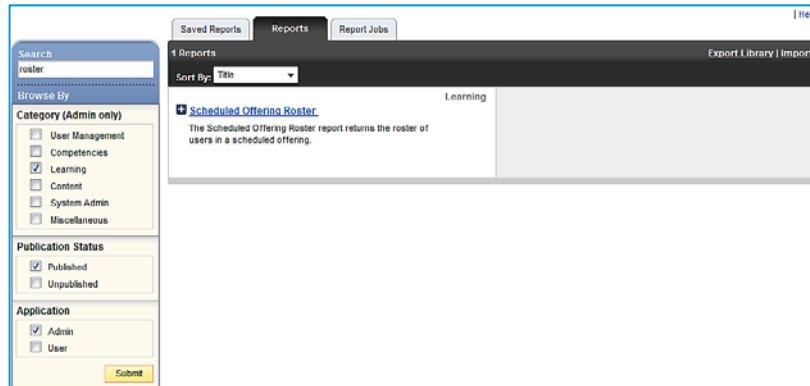


Figure 95. Reports Tab

4. Click **Submit**.
5. Click the report title link (i.e., click **Scheduled Offering Roster**).

The Run Reports screen displays (Figure 96).

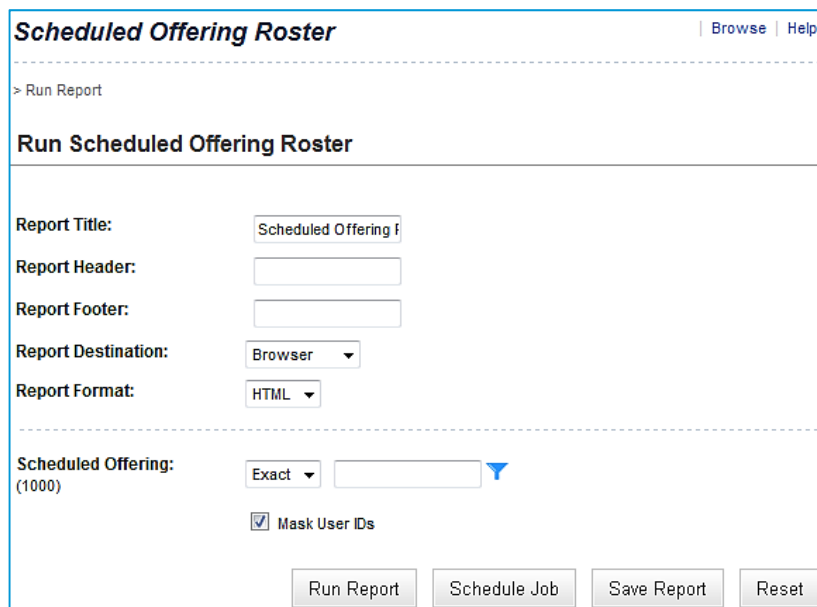



Figure 96. Scheduled Offering Roster Run Report Screen

6. Enter the title of the Scheduled Offering Roster report in the Report Title textbox.
7. Make the desired changes to the formatting section (report header, footer, destination, and format).
8. Click the scheduled offering **Create Filter icon** ().
9. Search for or enter the scheduled offering ID to search for the scheduled offering to run the report for.
10. Click **Run Report**.

The Scheduled Offering Roster report displays (Figure 97).



Segment	Start Date/Time	End Date/Time	Instructor	Location
1 Business Communication Simulation	6/5/2013 0800 America/New York	6/5/2013 1200 America/New York	Scott, Aubry D	Washington, DC Classroom 02
2 Business Communication Simulation	6/5/2013 1300 America/New York	6/5/2013 1700 America/New York	Scott, Aubry D	Washington, DC Classroom 02

Figure 97. Scheduled Offering Roster Report

Learning History Report

A need for most organizations is the ability to run reports on the items that users have completed successfully or made unsuccessful attempts at completing. The Learning History report returns the learning events for each user recorded during the date range specified in the filtering options. The report can be sorted by completion date or by item ID. You can choose to run a detailed or summary report as well as display item events, external events, or both. If the date range is not specified, the report contains all learning events recorded for the selected users regardless of the date.



Note: SuccessFactors strongly recommends entering a date range when running this report as to not impact system performance.

To run the Learning History report:

1. Navigate to **Reports**.
2. Enter **History** in the Search textbox.

3. Check the **User Management** category checkbox (Figure 98).

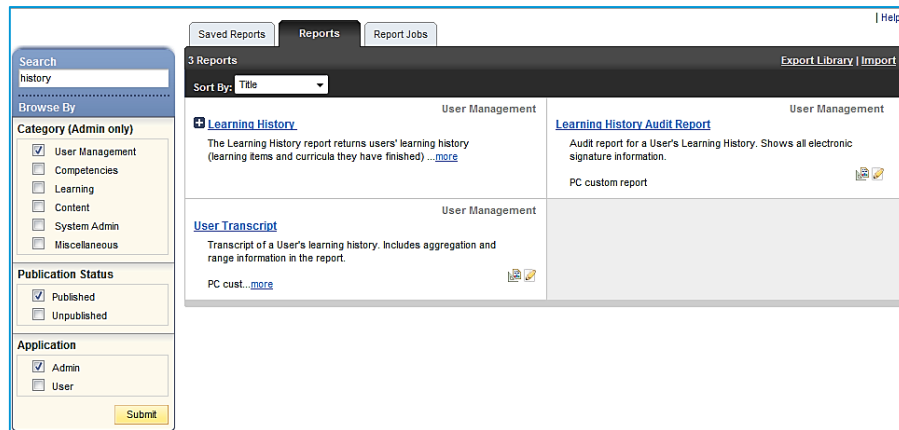


Figure 98. Reports Tab

4. Click **Submit**.

5. Click the report title link (i.e., click **Learning History**).

6. The Learning History Run Report screen displays (Figure 99).

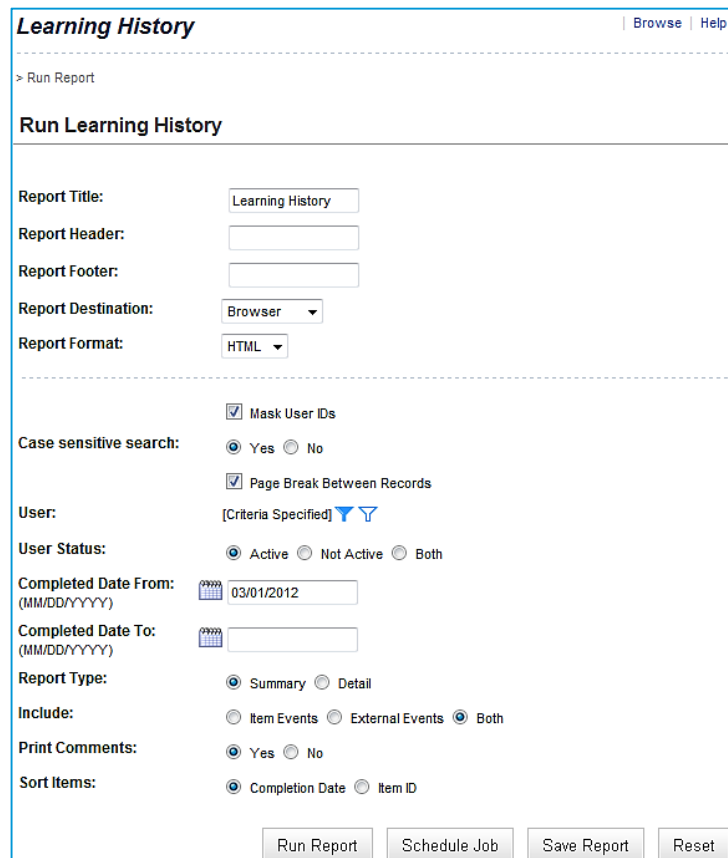



Figure 99. Learning History Run Report Screen

7. Enter the title of the Learning History report in the Report Title textbox.
8. Make the desired changes to the formatting section (report header, footer, destination, and format).
9. You can select the users from a list by clicking the **Create Filter icon** () to filter the search or by entering the ID into the User ID textbox. For example, to run a report to display all users who report to Marcus Hoff and their participation in a learning event, select the **Supervisors filter icon** and filter once more by supervisor. Search for and select a particular supervisor in your system (in this case, Marcus Hoff) (Figure 100).

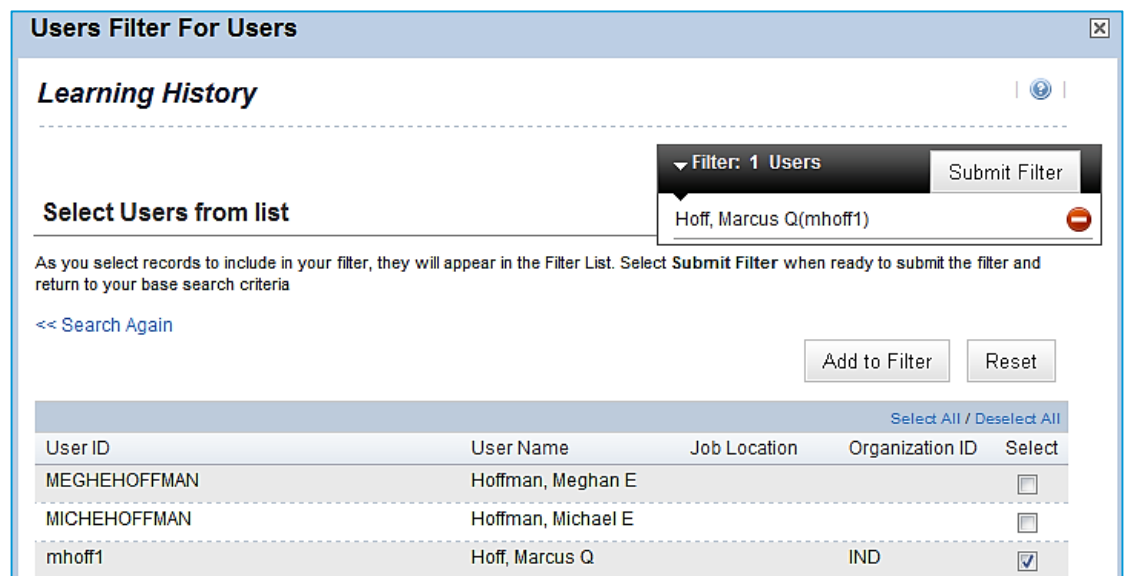


Figure 100. Filter by Supervisor

10. Click **Submit Filter** to return to the Learning History Run Report screen.
11. Specify completion date range as desired for the report. Notice in Figure 99, the date range has been configured to display only the events that the users participated in after March 1, 2012.
12. Select the **Summary** or **Detail** radio button to determine the amount of detail displayed on the report.
13. Select the radio button to specify the event type to include in the report: **Item Events**, **External Events**, or **Both** item and external events.
14. In the Print Comments section, specify whether you want to include comments that were entered for the user when the learning event was recorded.
15. Specify the field by which you want to sort the entries in the report: sort by **Completion Date** or **Item ID** (Figure 99).

16. Click **Run Report** to generate the report (Figure 101).

The screenshot shows the 'Learning History' report interface. It features two sections, each for a different user. The first section is for 'Family Dollar, User' and the second is for 'Family Dollar, Manager'. Both sections display a table of 'Item Events' with the following data:

Item ID	Title	Scheduled Offering ID	Completion Date	Grade	Status
COURSE EHS-101 (Rev 1 - 11/25/2008 0900 America/New York)	Emergency Planning		11/1/2012 1655 America/New York		COURSE-ATND

Figure 101. Learning History Report

Creating Saved Reports

Saving a report is similar to saving a search. SuccessFactors Learning prompts for a saved report ID and description when the **Saved Report** button is clicked. Saved reports are only available to the admin who created it (Figure 102).

The screenshot shows the 'Save Report' form. It includes a breadcrumb trail '> Run Report > Save Report' and a legend '* = Required Fields'. The form contains two input fields: 'Saved Report ID:' with a search icon and 'Description:'. At the bottom right, there are 'Submit' and 'Reset' buttons.

Figure 102. Reports: Saving a Report

When you save a report, you save the report parameters you enter on the Run Report page; therefore, it may be beneficial to submit criteria as filter options. Saved reports are stored on the Saved Reports tab of the Reports interface. To run a saved report, navigate to the Saved Reports tab, locate the report you wish to run, and then click the **Run** (🖨️) button (Figure 103).

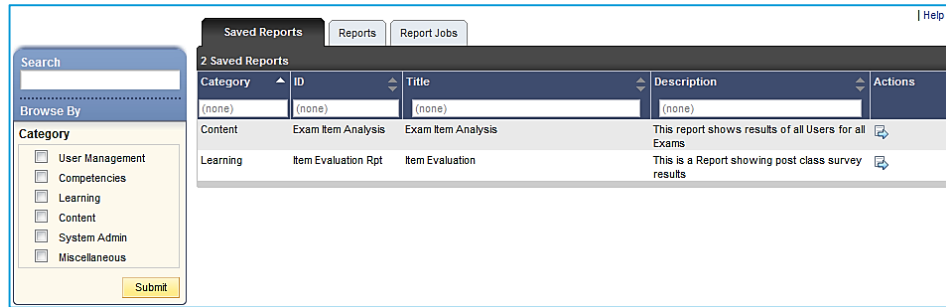


Figure 103. Saved Reports Tab

To sort the saved reports, click the ascending or descending buttons in the column headings. To filter the saved reports list, enter the filtering text in the textbox in the column headings.

To remove a saved report, click the **Run** () button and then click **Remove** at the bottom of the Report screen (Figure 104).

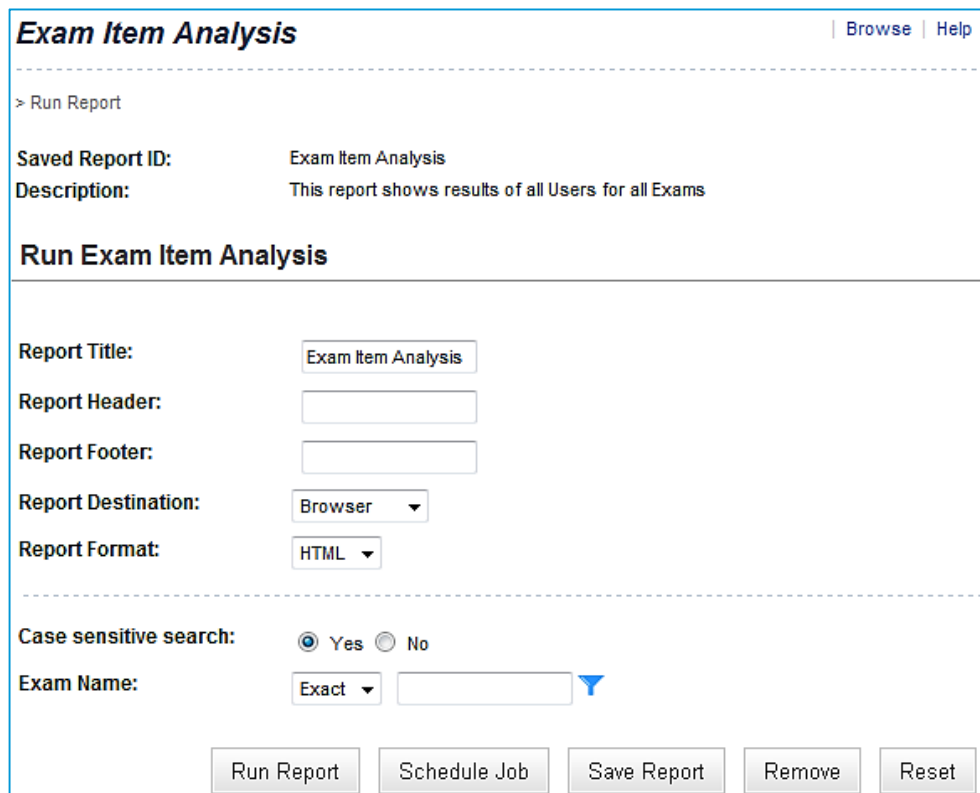


Figure 104. Removing a Saved Report

Create Recurring Reports

Any report can be scheduled to run one time in the future or recur on a daily, weekly, or monthly interval. Scheduling a report can be especially useful in the following conditions:

- ▶ You want to run a report that will return a large volume of records: by scheduling the report to run once at a later time during low usage, you reduce the report's strain on the system.
- ▶ You need to run a report periodically: this can easily be achieved by scheduling the report to run on a recurring basis

On the Run Report screen, schedule a report by clicking the **Schedule Job** button (Figure 105).

Run Exam Item Analysis

Report Title: Exam Item Analysis

Report Header:

Report Footer:

Report Destination: Browser

Report Format: HTML

Case sensitive search: Yes No

Exam Name: Exact 🔍

Run Report Schedule Job Save Report Remove Reset

Figure 105. Reports: Schedule Job

Once the **Schedule Job** button is clicked, you see the following scheduling options:

- ▶ Run the job immediately: This is the same as clicking the Run Report button on the previous page
- ▶ Schedule the job to be ran once in the future
- ▶ Schedule the job to recur: daily, weekly, or monthly (Figure 106)

To be notified by email that the report has run, check the **Notify via email upon completion** checkbox and specify one or more email addresses. If you would also like the report to be sent to you or another recipient through email, check the Email the Report checkbox.

Multiple email addresses can be entered into the email address field, but must be separated by a comma, semicolon or colon (, ; or :). The report can also be downloaded once the report has run from the Report Jobs tab of the report interface. Reports that are only scheduled to run once display under **System Admin > Background Jobs**.

Schedule Background Job

You have opted to schedule this report to run in the background. Please complete the following information if you want this action to run at a specific date and time. If you choose to be notified by email upon completion, please select "Notify via email upon completion" checkbox and specify an email address. If you wish, the report file can be emailed to you when it has been generated, or you can download the report file once the report is complete from the Background Report Jobs module or, if the report has been scheduled as a recurring job, you can download the report from the Recurring Report Jobs module.

Run this job immediately, if allowable.

Schedule this job to be executed on: [View Available Time Slots](#)

Date: (MM/DD/YYYY) AM

Time: (hh:mm AM/PM)

Time Zone: Eastern Standard Time (America/New York)

Schedule this job to recur as follows:

Daily

Weekly **Day:** Sunday

Monthly **Date:**

Time of Day: 12:00 am (hh:mm AM/PM)

Time Zone: Eastern Standard Time (America/New York)

Job Description: User Learning Needs Group Bf User

Notify via email upon completion

Email: mhoff@successfactors.com, lyabel@sap

Email the Report

Figure 106. Scheduling Background Report Options

In this example (Figure 106), the report runs every Sunday at 12 AM, EST and sends copies of the report to Marcus Hoff and Lyndsey Abel.

Admins can only schedule reports to run during predetermined available time slots. Click the **View Available Time Slots** link to display the list of allowed days, dates, and times (Figure 107).

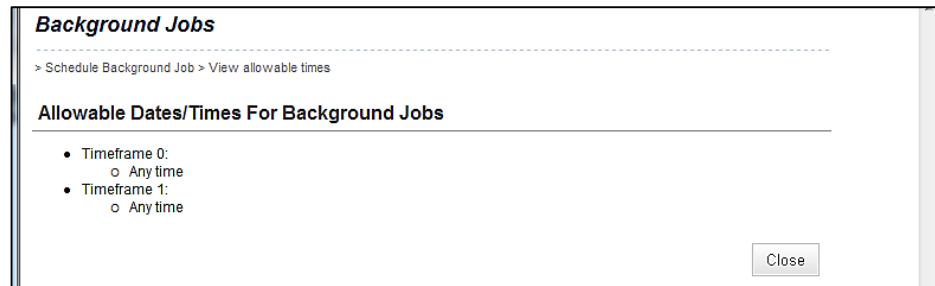


Figure 107. Reports: View Available Time Slots Link

Conclusion

SuccessFactors Learning offers many different reporting options. Admins can specify format, report file type, and viewing destination. Reports can be saved, scheduled on a recurring basis, and emailed. Finally, filters are saved using the **Submit Criteria** button to dynamically update search criteria for saved and recurring reports.

Knowledge Check

Use what you learned in this module to answer the following questions.

1. Create a learning plan report that filters on a supervisor.
2. Save the report.
3. Run the report and verify the results.
4. Add another subordinate to the supervisor.
5. Run the report again.
6. Did the report reflect the changes you made? Why or why not?

7. True or false: Administrators can share saved reports with one another.



Activity

You need to know who did not complete a particular curriculum. Your boss wants you to report this information to her every Monday morning at 8 AM. Set up the solution in SuccessFactors Learning.



Job Aid: Run Reports: Basic Tasks

Job Aid: Run Reports: Advanced Tasks

Notes

Appendix B: QuickGuides Overview

QuickGuides put the power in the end user's hands providing a way to quickly produce job aids. These job aids are created using a collection of steps made up of images and text instructions. The overall goal of this QuickGuides appendix is to provide you with a high-level overview of the QuickGuide feature in SuccessFactors Learning.

Becoming Familiar with QuickGuides

Users with the **Author QuickGuides** workflow can create a QuickGuide description which is searchable in the catalog (Figure 108).

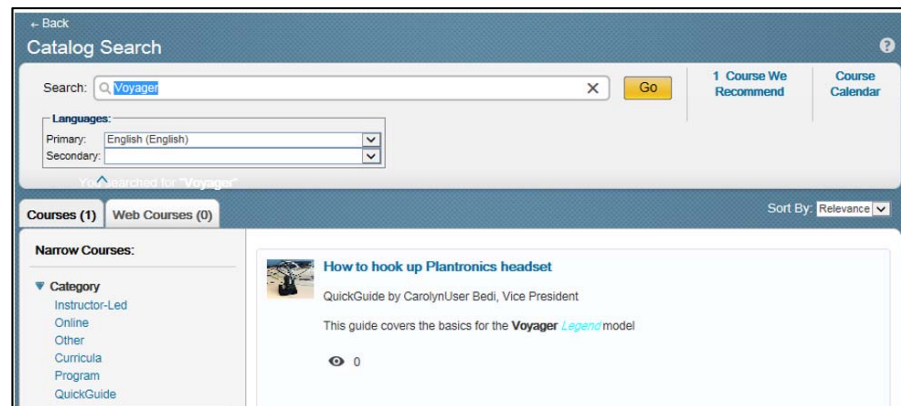


Figure 108. QuickGuide in a Catalog Search

Users can bookmark QuickGuides from search results or from a launched QuickGuide. These bookmarks are easily accessed from the home page of a PC or from within the iPhone app (Figure 109).

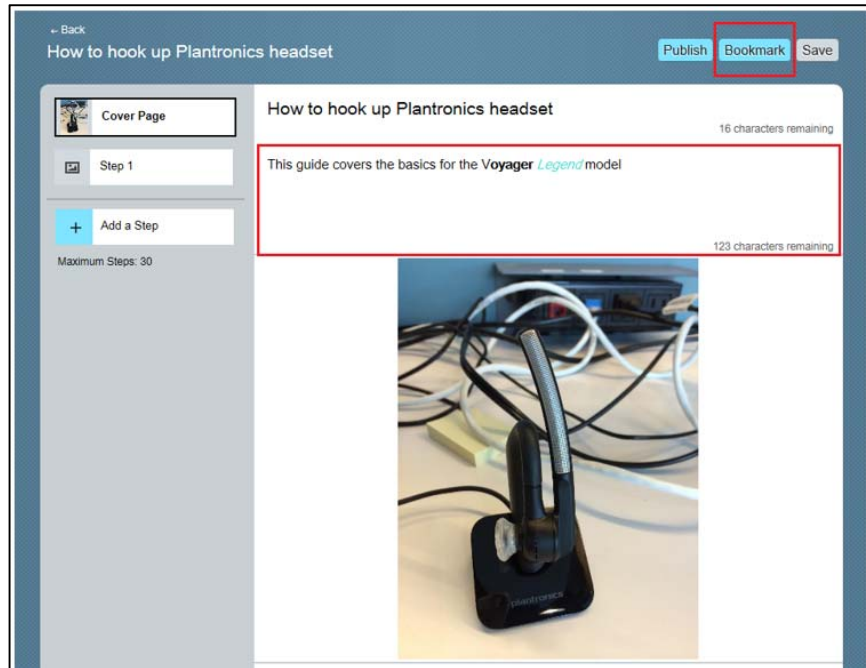


Figure 109. iPhone QuickGuide Bookmark Option

Admins can monitor certain statistics related to QuickGuides. They can view the amount of storage used by QuickGuides as well as how many QuickGuides have been created (Figure 110). The storage capacity is currently limited to 10GB. Future space may be allocated through additional licensing.

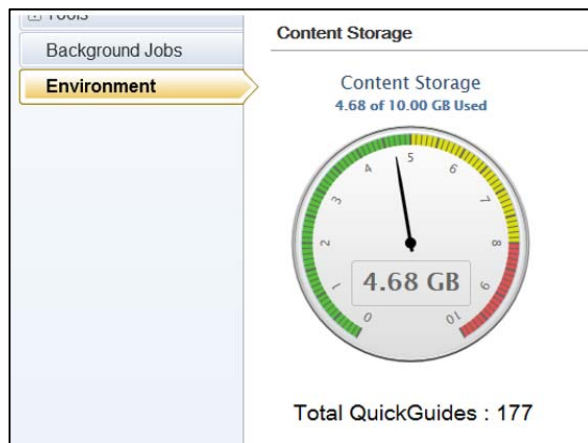


Figure 110. Content Storage

Similar to Items, users have the ability to rate QuickGuides with the same 1star to 5 stars rating scale (Figure 111). The rating interface is easily accessed from a launched QuickGuide on a PC or from within the iPhone app.

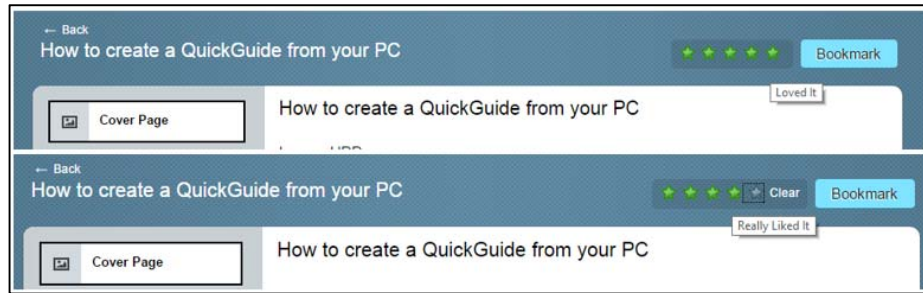


Figure 111. Rating a QuickGuide

The cumulative rating is visible to users in catalog search results and to administrators in the QuickGuide tab of the snapshot (Figure 112).



Figure 112. QuickGuide Cumulative Rating

Conclusion

SuccessFactors Learning provides the ability for end users to create QuickGuides. QuickGuides can be searched in the catalog, bookmarked, and rated. Admins can view statistics on QuickGuide count & storage usage.