SAP SuccessFactors HCM Suite
Q2 2016 Release

SAP SuccessFactors End User Job Aid

Learning

SAP SuccessFactors

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Learning Introduction

SAP SuccessFactors Learning manages the entire learning lifecycle as users progress through each step including:

- Searching for items in a catalog in order to self-assign learning
- Assigning learning that displays on the users' Learning Plan/To Do List
- Registering for a scheduled offering of an instructor-led event
- Launching online learning tools for self-paced learning options
- Recording learning history after completing a learning event
- Submitting feedback on evaluations

Learn: **User Home Page**

The Learning Home page is your starting point for navigating learning. Tiles provide quick access to learning information and activities personalized to you and your role.

1 My Learning Assignments

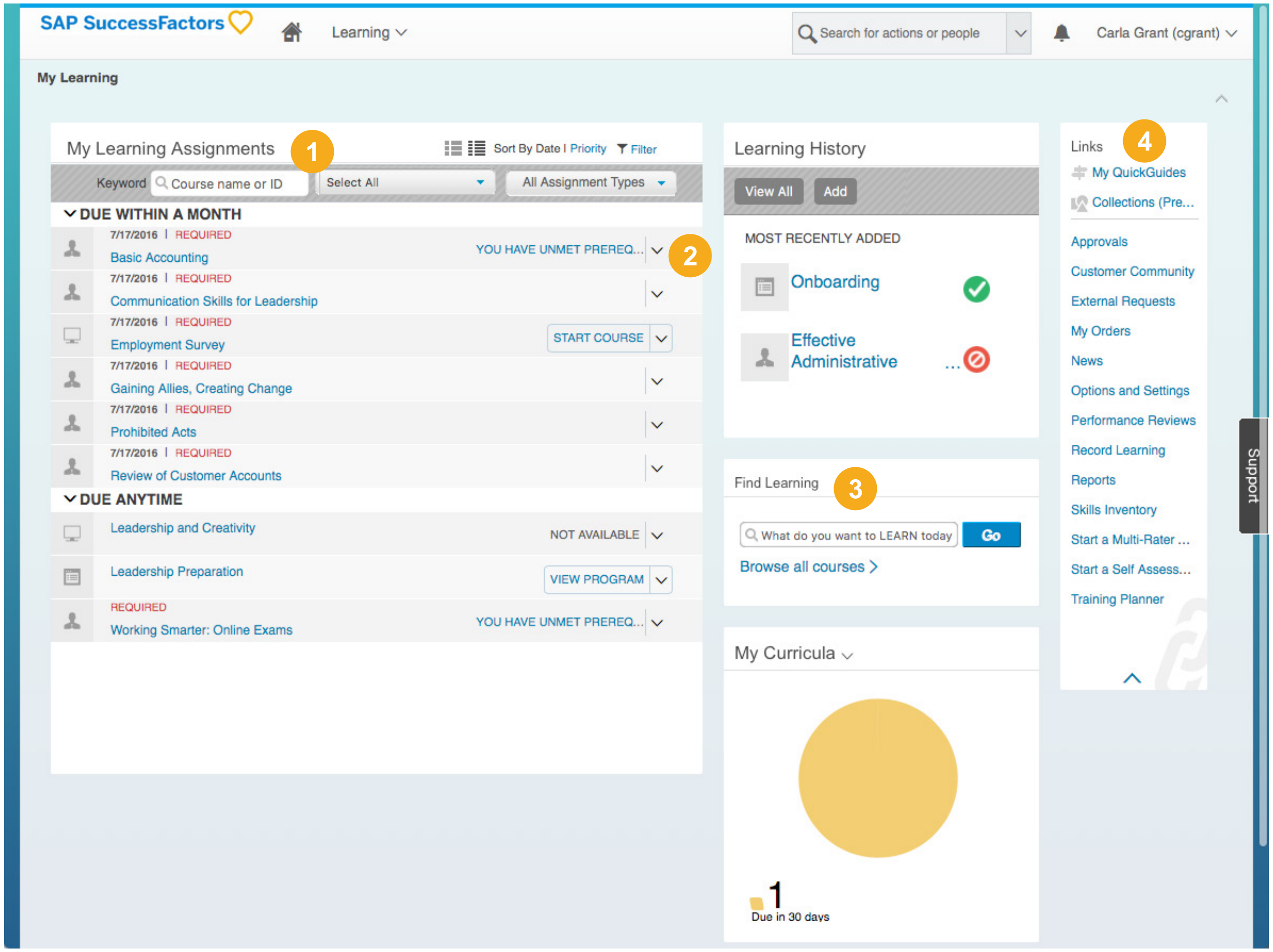
The ***My Learning Assignments*** tile displays your assigned learning activities. You can view your assignments and related details, launch training, and register for offerings. It provides a consolidated view of courses requiring action.

- All courses are listed in one place.
- Courses are listed and grouped by ***Due Date***. (Optional and Recommended training will have no due date.)
- Use the ***Show*** drop-down menu to see specifics, for example, show current registrations and online courses

2 My Learning Assignments Actions

Each learning activity is listed with a call-to-action button and status update. You can show/hide information, view the course start date and location for enrollment. Actions include:

- ***Request Approval***: Initiate an approval request via an automated workflow.
- ***Request Schedule***: Request information on the availability and course schedule from the course owner.
- ***Start Course:*** Launch a course.
- ***Continue Course:*** Re-launch a course you have started.
- ***Register Now:*** Register for a course assigned to you.
- ***Remove Course:*** Remove a course that you have assigned to yourself.



3 Find Learning

Searches for learning activities in the available catalog. Enter keywords in the text box to perform a quick search for related items in the catalog. Click ***Browse All Courses*** to navigate to the Learning Catalog.

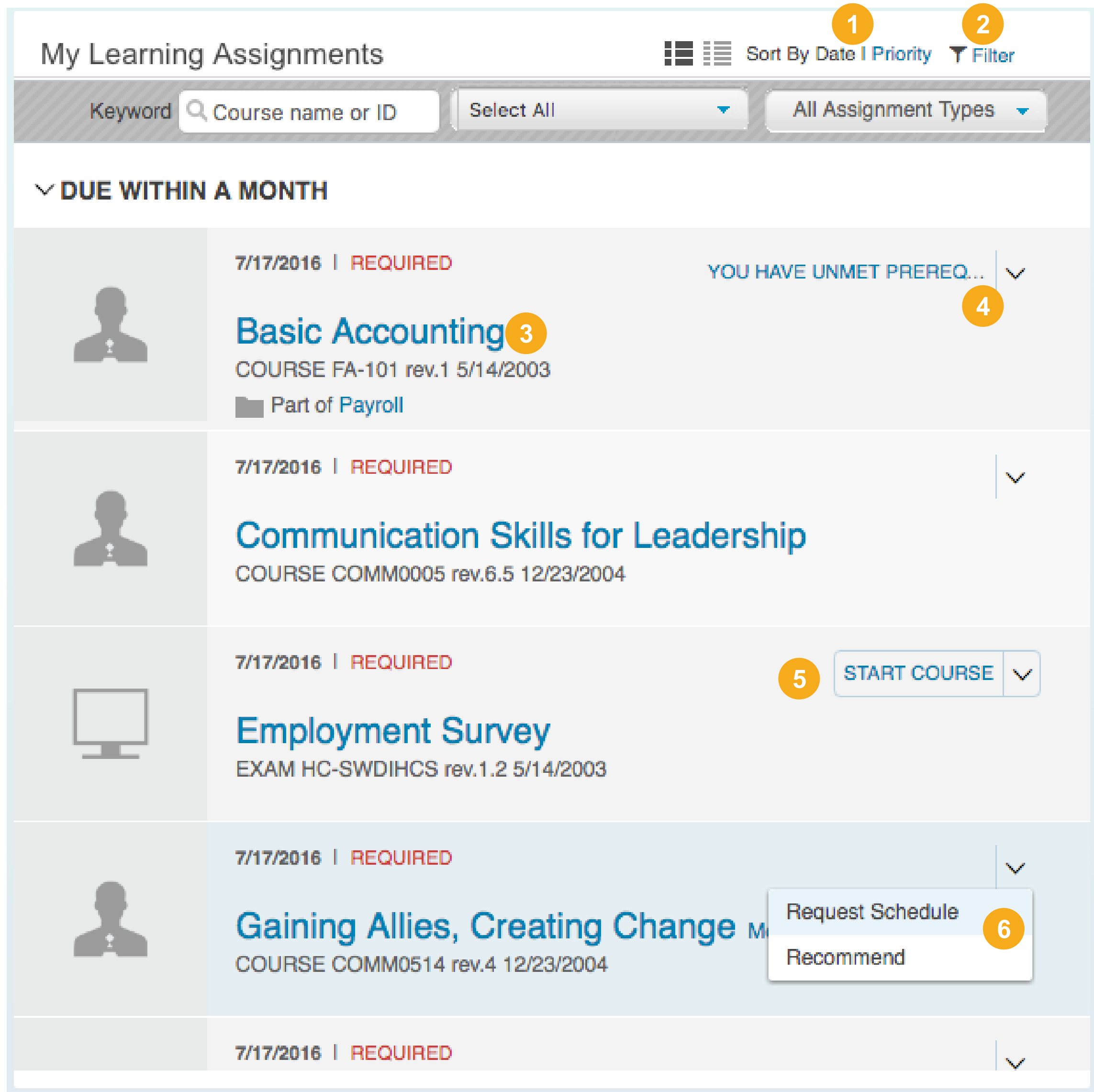
4 Links

Links to other learning and system features.

Step by Step: **My Learning Assignments**

The ***My Learning Assignments*** tile includes call-to-action buttons and statuses per item, the ability to show/hide additional filters, configurable data fields, display of start date and location for enrollments, and one-click to display curriculum requirements.

1. By default, My Learning Assignments is ***Sorted by Date***; however you can click ***Priority*** to sort the list by item priority, or create a view filter.
2. By selecting ***Filter***, a row of fields will display. The user can enter a keyword and select the Course Type and/or an Assignment Type.
3. Click on a Course title to display additional item information on the item detail page. The item detail page can be configured by an administrator to display visually appealing descriptions.
4. My Learning Assignments displays curriculum requirements. A curriculum requirement displays to schedule, assign, evaluate, and track the completion status.
5. Launch content that is set up to be available online. There are two broad categories of online content:
   - Access an online document with an option for "read and acknowledge"
   - Launch web-based training (WBT) as a self-paced module with menus, embedded quizzes, etc.
6. If there is no existing scheduled offering in your catalog, you may ***Request Schedule*** by clicking the down arrow. The request is stored in the system with the user name and the item requested.



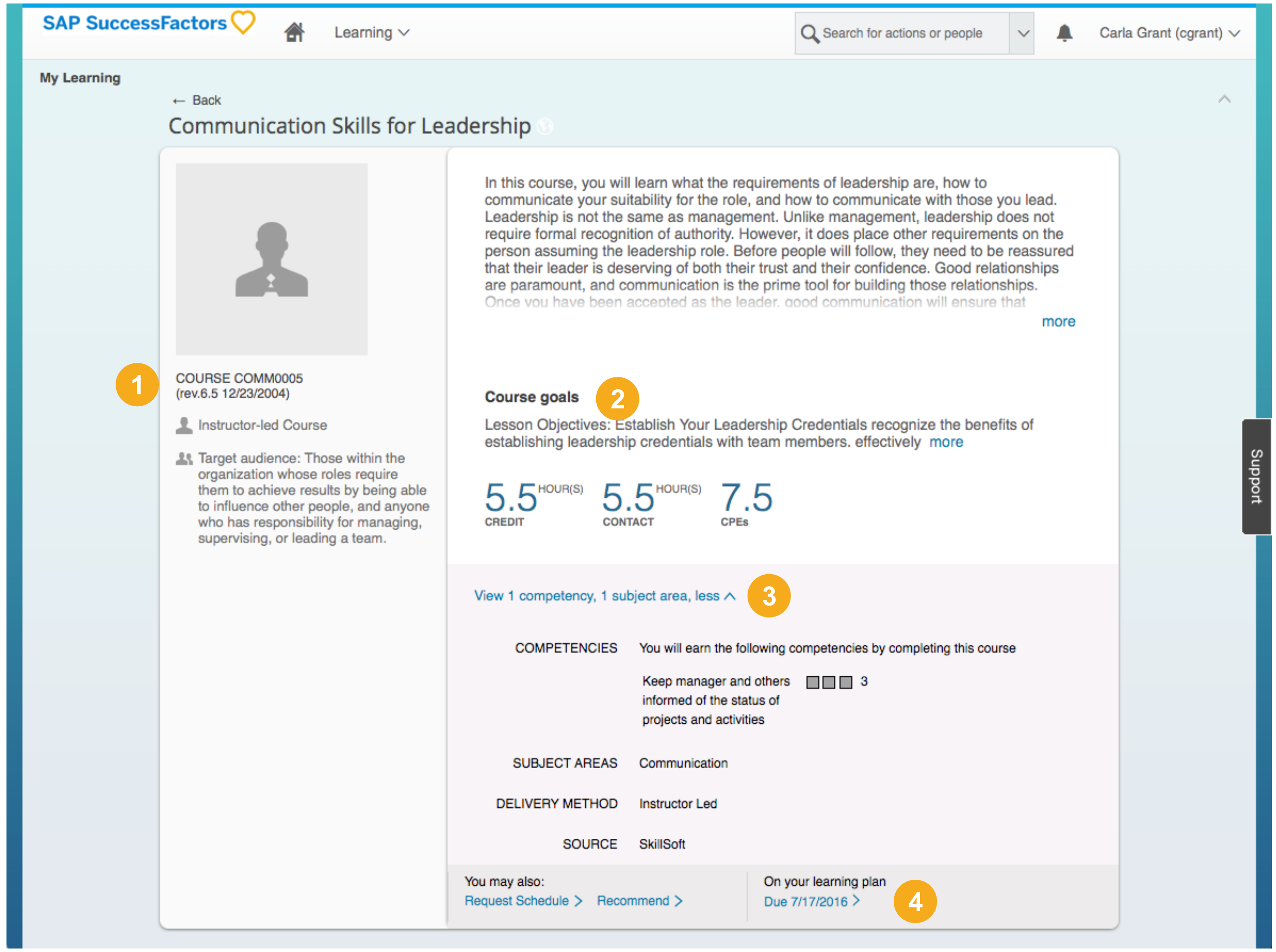
Due Dates on My Learning Assignments

- Overdue
- Due Within a Week
- Due Within a Month
- Due Later list courses beyond 30 days
- No Due Date lists for items that are self-assigned or have no required due date
- Select the arrow to expand the courses group into the dates.

Step by Step: **Learning Course Details Page**

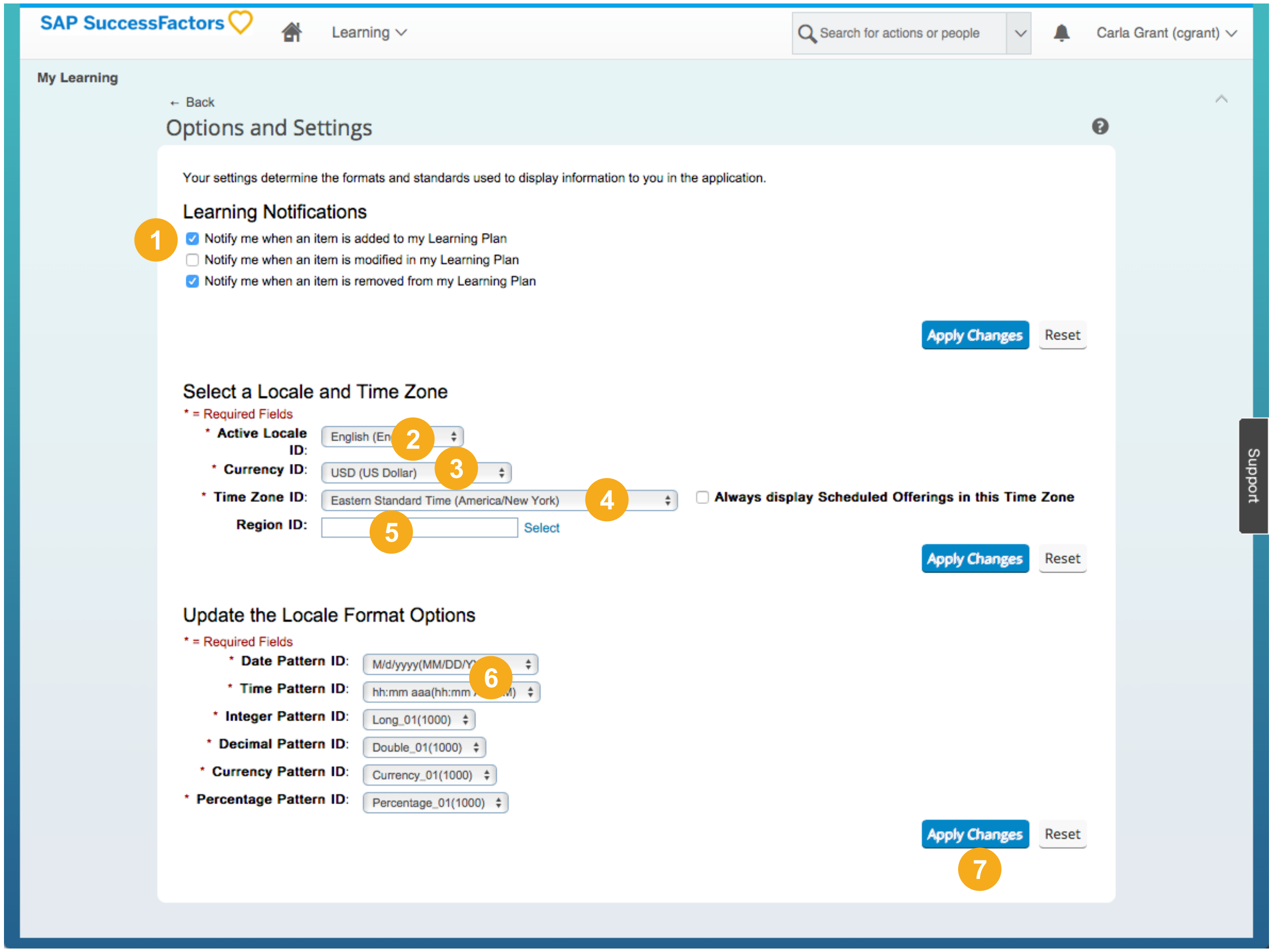
Click a course title link in ***My Learning Assignments*** to view ***Course Details***. Here you can review information about the course, your registration, and any course requirements.

1. Basic information about the course is displayed:
   - Type of course (online, instructor led, etc.)
   - Target audience (employees, managers, business unit, etc.)
   - Who to contact (email) for questions about the course or assignment
2. The course description and goals are listed along with the time commitment and CPEs:
   - Length of the course in hours
   - Credits for course listed in hours
   - Contact in hours
   - Continuing Professional Education (CPE) (if applicable for Professional Certification)
3. Click ***more/less*** to expand/collapse subject areas and associated competencies (if applicable) for the course.
4. You may also:
   - Request Schedule to receive notification for the next available scheduled course.
   - Recommend the course to others.
   - View assignment details.



Step by Step: **Learning Options and Settings**

SuccessFactors Learning allows you to configure your learning settings. Select ***Options and Settings*** from the ***Links*** menu to update your learning preferences. Your settings determine the formats and standards used to display information to you in the application.



Learning Notifications

1. Learning Notifications are Admin controlled functions that can be configured either globally or locally. Users cannot control the configuration for notifications.

Select a Locale and Time Zone

2. Select the ***Active Locale ID*** to change the display language for the system. **NOTE:** If you change the ***Active Locale ID***, only courses available in the selected language will be displayed
3. The system currency is configured to USD. Changing the ***Currency ID*** does not recalculate amounts from USD.
4. Use the ***Time Zone ID*** for your region. This is an important step to ensure course schedules display the correct local time.
5. Do not change the ***Region ID***.

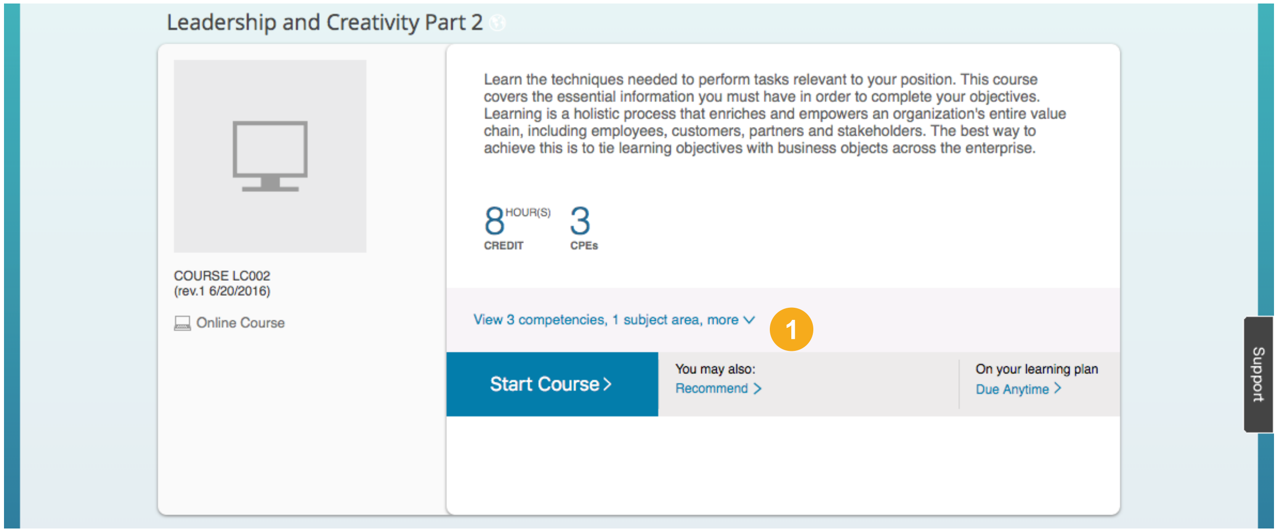
Update the Locale Format Options

6. Update the ***Date Pattern ID*** and ***Time Pattern ID*** to your local/regional preferences. Courses will be displayed with these settings.
7. Click ***Apply Changes*** to change your settings.

Step by Step: **Launch an Online Course**

Select ***Start Course*** to launch online courses. The Online Content Structure page displays.

1. Review the outline of content objects. A course may contain one or more content objects.
2. The Online Content Structure window will launch once the page is loaded. **NOTE:** Do not close the Online Content Structure window after you launch content. The window must stay open because it needs to record when you complete a content object.
3. Completed objects will be listed with the date of completion. **NOTE:** Admins can enforce the sequential completion of content objects in the settings.



Learning Actions

- ***Start Course***: Launch a course.
- ***Continue Course***: Relaunch a course you have started.
- ***Register Now***: Register for a course assigned to you.
- ***Remove Course***: Remove a course that you have assigned to yourself.
- ***Request Schedule***: Request registration for an unscheduled course.

Content Objects

Courses may be made up of one or more content objects.

1. Select an object title to launch that content object.
2. Completed objects will be listed with checkmarks and the date of completion.

Continue a Course

To relaunch a course you have already started:

1. Select ***Continue Course on My Learning Assignments*** to re-launch online courses and activities.
2. The Online Content Structure page displays and the course launches in a new window.

Remove Course

Courses the employee self-registered for may be removed. To remove a course:

1. Select the course title.
2. On the course detail page, select ***Remove***.
3. Click ***Yes*** to confirm removal.

The course is removed from ***My Learning Assignments***.

Step by Step: **Learning Survey**

Surveys gather feedback that helps determine the effectiveness of training. Upon completion of a learning event, the system can automatically assign you a survey to complete:

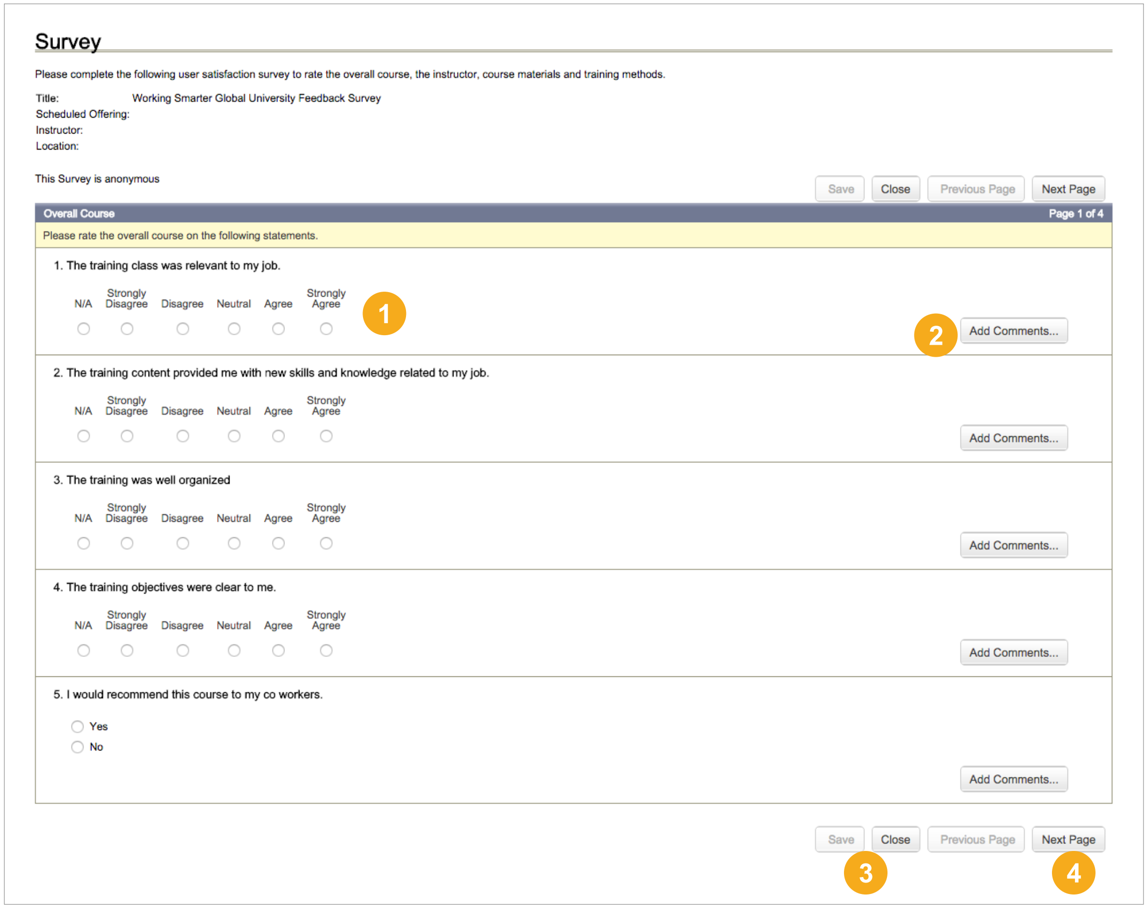
- An item evaluation to collect feedback related to user satisfaction (immediate reaction)
- A follow-up evaluation to provide input on how the user has applied learning on the job (behavior change as a result of learning)

Accessing Surveys

1. From the ***My Learning*** page, filter the To-Do List to show only ***Surveys***.
2. Select ***Start Survey*** to launch the survey. **NOTE:** You may return to a survey by selecting ***Continue Survey***.

Completing a Survey

1. Surveys in the LMS consist of a set of questions. Administrators can group related questions into a pool using an objective. Complete by selecting the appropriate response for each question.
2. Select ***Add Comments*** to add additional information to your response.
3. Click ***Save*** and ***Close*** to leave the survey and return at a later time.
4. Continue to click ***Next Page*** to answer additional questions. When you have completed the questions, click ***Submit***.



Types of Learning Surveys and Exams

Surveys or exams may be created and existing exams may be used to support three levels of evaluation:

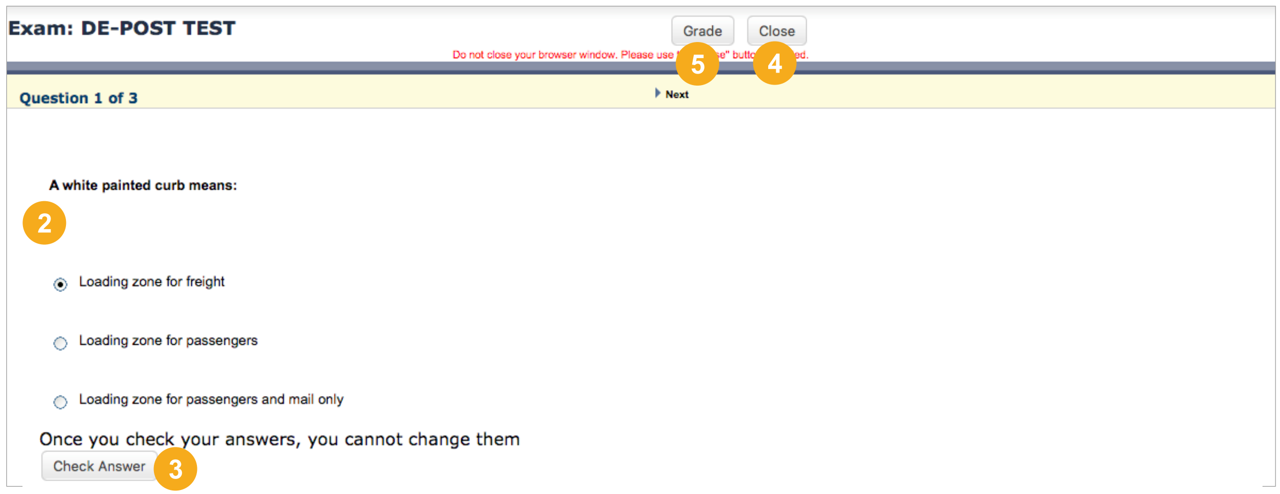
- ***User Satisfaction***: Evaluation survey (course feedback form, sometimes called "Smile Sheet")
- ***Mastery of Content***: Take a test to demonstrate knowledge of the content (using existing exam objects designated as pre-test and post-test).
- ***Application of Learning***: Demonstrate skill at work and is evaluated. A questionnaire survey is created, applied to the item, and configured to include either the user/employee, his/her manager, or both. After the item has been completed, the participants will be assigned the survey a set number of days after the completion of the item (days are set at the item level) and have a designated amount of time to complete.

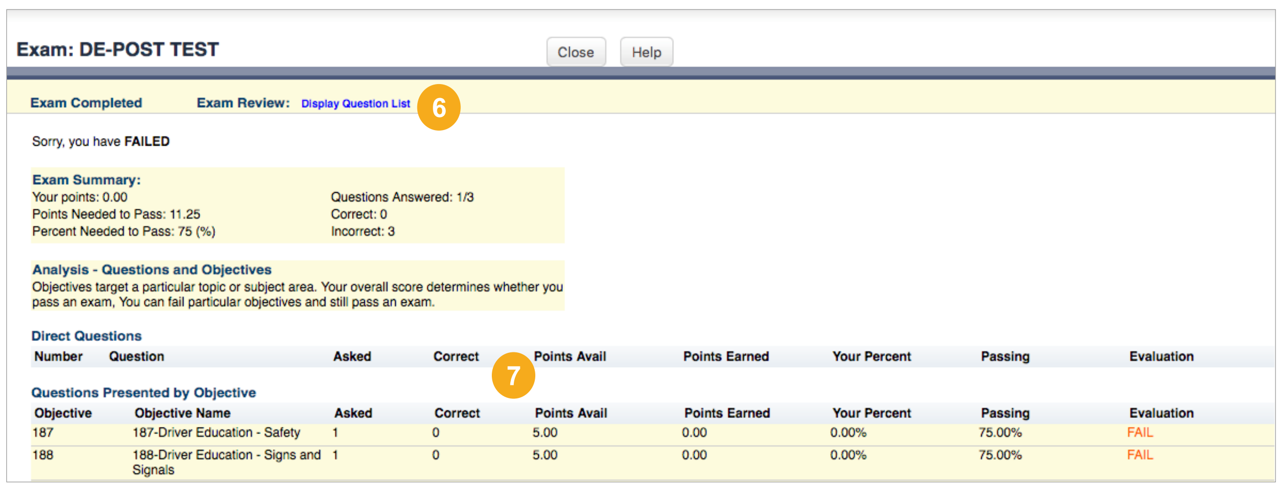
Step by Step: **Learning Exams**

For online content and online exams, you may access and complete an exam directly from ***My Learning Assignments*** or by finding the item in the catalog. For instructor-led events, you can fulfill the assignment only by attending the course, either in person or virtually. When an exam is associated with an item, users can launch the exam from their Learning Plan and upon completion of an exam, users' scores are tracked.

1. Exams are listed as content objects and can be pretests or post content exams. Select an exam link to get start.
2. Exams in the LMS consist of a set of questions. Administrators can group related questions into a pool using an objective. Complete by selecting the appropriate response for each question.
3. Select ***Check Answers*** to instantly review individual questions.
4. Options include whether the user can revisit content during the exam (like an "open book" exam), whether the exam is timed, the passing grade, etc. You may click ***Close*** and return to the exam at a later time.
5. Select ***Grade*** to complete the exam and view the results.
6. If enabled, select ***Display Question List*** to review the questions they missed on the exam or they can be given access to review all questions.
7. The completed exam results are listed. Options include an exam summary, analysis, and the questions listed.

Results of exam are listed on the ***Learning History*** and completed work.



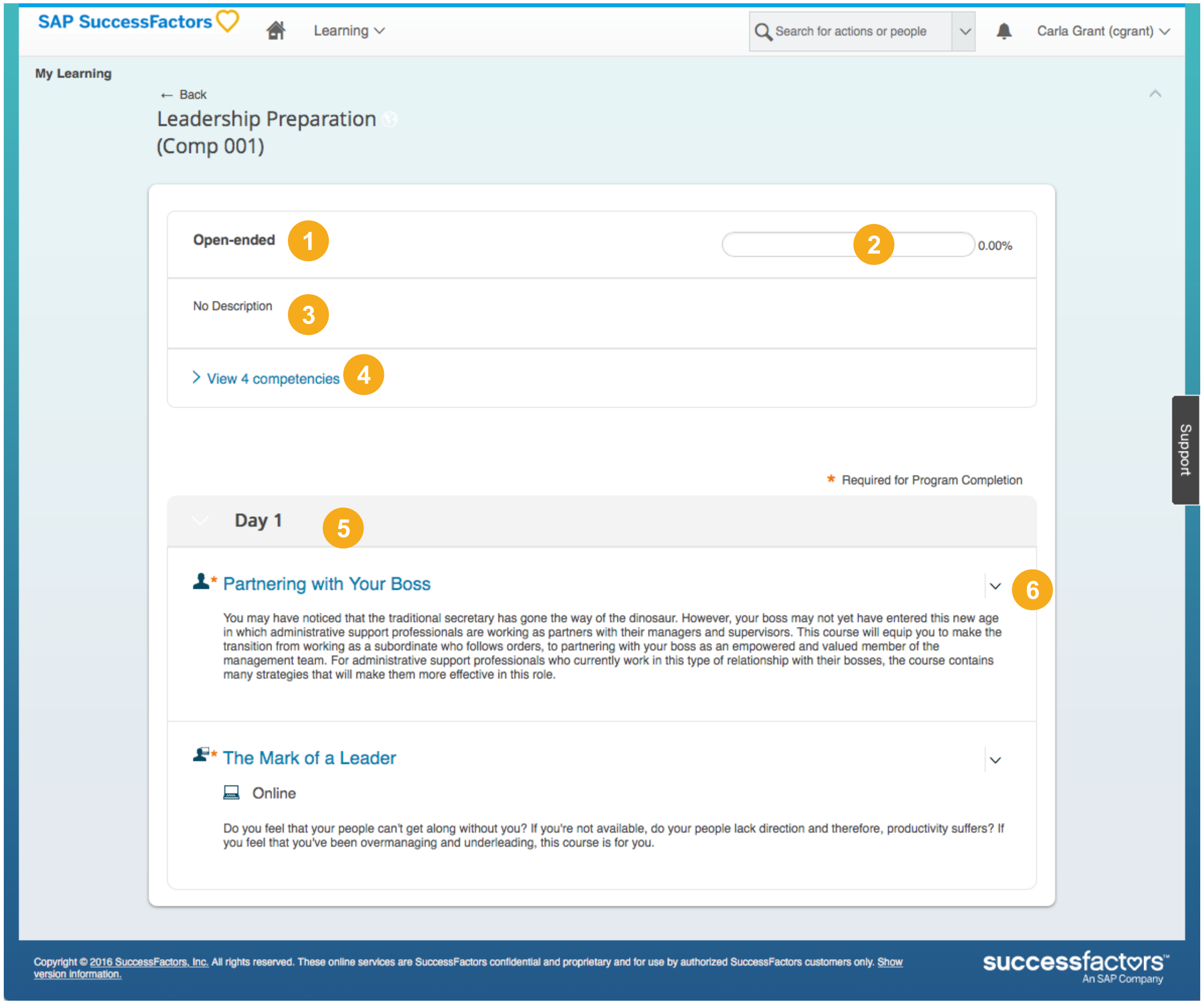


Step by Step: Learning Programs

Learning Programs combine a variety of learning elements and activities and structure them in the manner and order that you intend them to be consumed.

1. Learning program type is listed. The program is listed as Academic-style, schedule-based training, Event-based training (e.g. new hire/ position) or Self-paced, open-ended training.
2. Program ***Status*** monitors progress toward completion.
3. Program ***Description*** outlines the purpose and learning objectives of the program.
4. Click ***View competencies*** to view associated competencies.
5. Program ***Schedule*** list the agenda and order of learning items.
6. Use the ***Action*** drop-down to launch items or take action on the program elements.

Programs provide continuous learning over time. They allow for learners to be enrolled in an almost unlimited set of scheduled learning objects, including Jam groups.



Common Tasks: Learning Tiles

Learning History

Access your completed work list by clicking the ***Learning History*** tile to view, search for, and sort for completed work.

1. The tile displays the number of recently recorded completions.
2. Click ***View all*** to view the Completed Work page.
3. If configured, a user can record completion of items directly from the History tile by selecting ***Add*** from the History menu.

Links

Display of each link is controlled via user workflow.

1. Access pages both inside and outside the LMS quickly and easily.
2. Click the down arrow in the tile to see the full list at any time.

My Curricula

The ***My Curricula*** tile shows a color-coded snapshot of status for all assigned curricula.

1. Click the tile to drill down to details on the related items.
2. Administrators can assign a priority level to curriculum. Levels are numeric, and globally configured up to "10". This helps end users to prioritize their curriculum assignments.
3. Priority levels can also be assigned to Assignment Types in order to help you prioritize your assignments. My Learning Assignments can be grouped by priority.

Find Learning

Search for learning using the ***Find Learning*** tile.

1. Enter keywords into the text field and click ***Go***.
2. Click ***Browse all courses*** to access the course catalog in SuccessFactors Learning.

NOTE: If the user is also a supervisor, the link for ***Assign to Others*** is displayed. This provides an easy way to assign training to employees.

Scheduled Offering Tile

The ***Scheduled Offering*** tile automatically searches for and suggests scheduled offerings to help you fulfill your learning assignments. The learning assignments can be on your learning plans or part of a curriculum.

1. The scheduled offering is in your catalog. The tile returns scheduled offerings when you has access to them through catalogs.
2. The scheduled offering is in your region. When the search runs out of scheduled offerings in your region, it completes the set of twenty soonest scheduled offerings without regard to region, using only the soonest offering.

Custom Tiles

Your Learning Administrator can add custom tiles to the Learning landing page. The custom content tile supports media rich tiles and can be personalize the landing page by creating custom content tiles for specific organizations as well as define specific dates when the tile will be displayed.

Learning Catalog

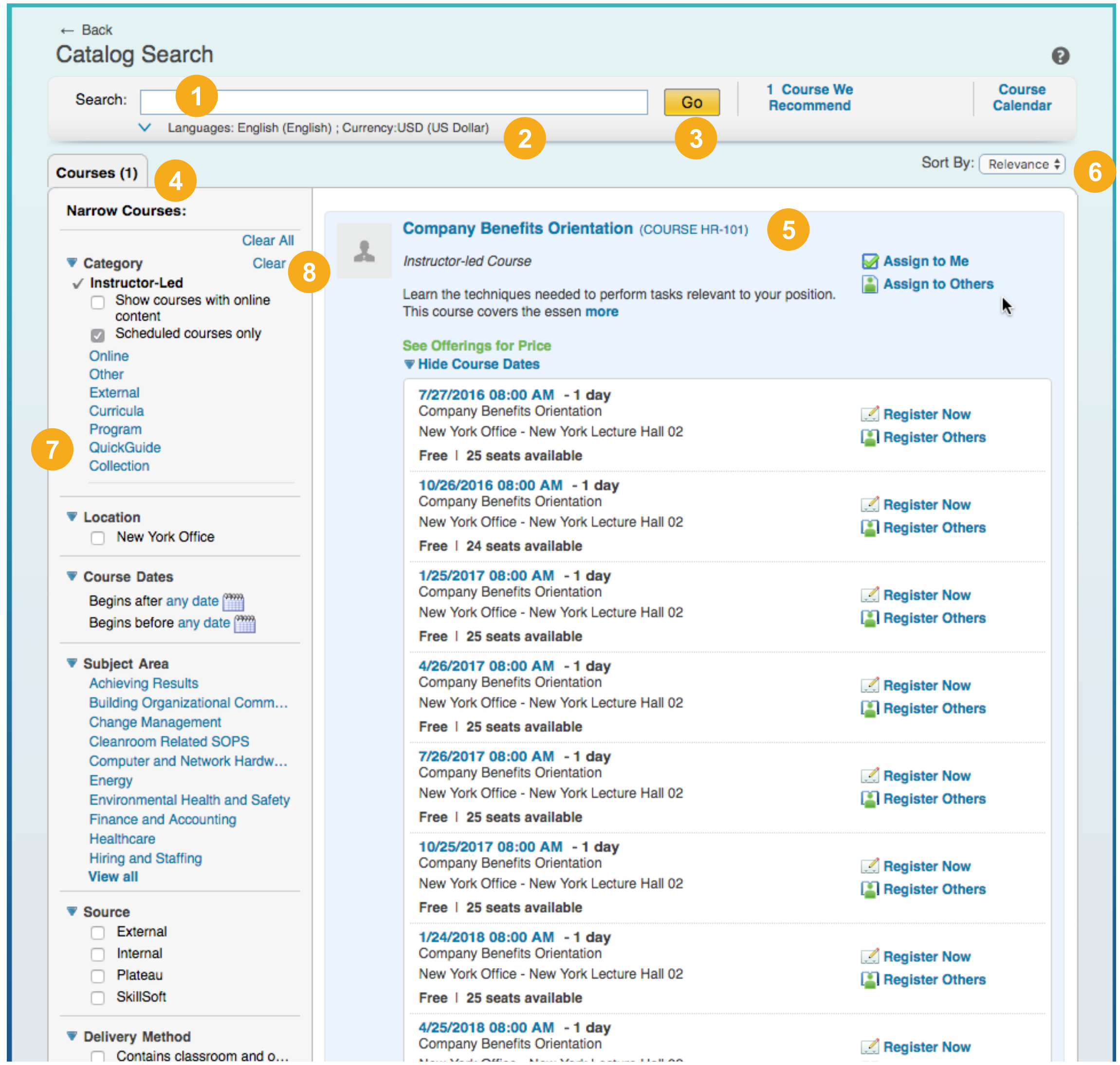
The Learning Catalog controls what items, curricula, and scheduled offerings users can see and self assign or self register.

Step by Step: **Catalog Search**

The Learning Catalog is used to browse, search, launch a course, and enroll in learning activities. Courses can be Instructor led training, online training, or an event that has a blend of online and instruction.

1. Enter keywords related to the topic of the course, title, or other relevant information in the ***Search*** field. Be sure to enter the whole word in the search, partial words will not return results.
2. Click on the ***Language*** link to switch between the language collections of training activities. **NOTE:** Languages are only displayed for the selected language in your ***Options and Settings***.
3. Click ***Go***.
4. The ***Courses*** tab lists all of the courses that are available in the Learning Catalog, based on the search criteria.
5. The search results table lists the applicable learning activities:
   - The course type, category, and schedule
   - Click a course title to view additional details about the learning activity

   Hover your mouse over a course to display available actions:
   - ***Request Schedule:*** request notification for the next available scheduled course
   - ***Add to Learning Plan:*** create an assignment for the course
   - A ***Start Course*** link displays here for online courses so you can start the training
6. Use ***Sort By*** filter to organize the search results by different options by title.
7. Click the links and check boxes to filter results ***Category, Subject area, Source,*** or ***Delivery Method*** **NOTE:** Once you select the category, the filter choices will change. For example, if you select instructor led item, available course dates will be displayed.
8. Click ***Clear*** to remove filters in a section or ***Clear All*** to remove all filters in all sections.

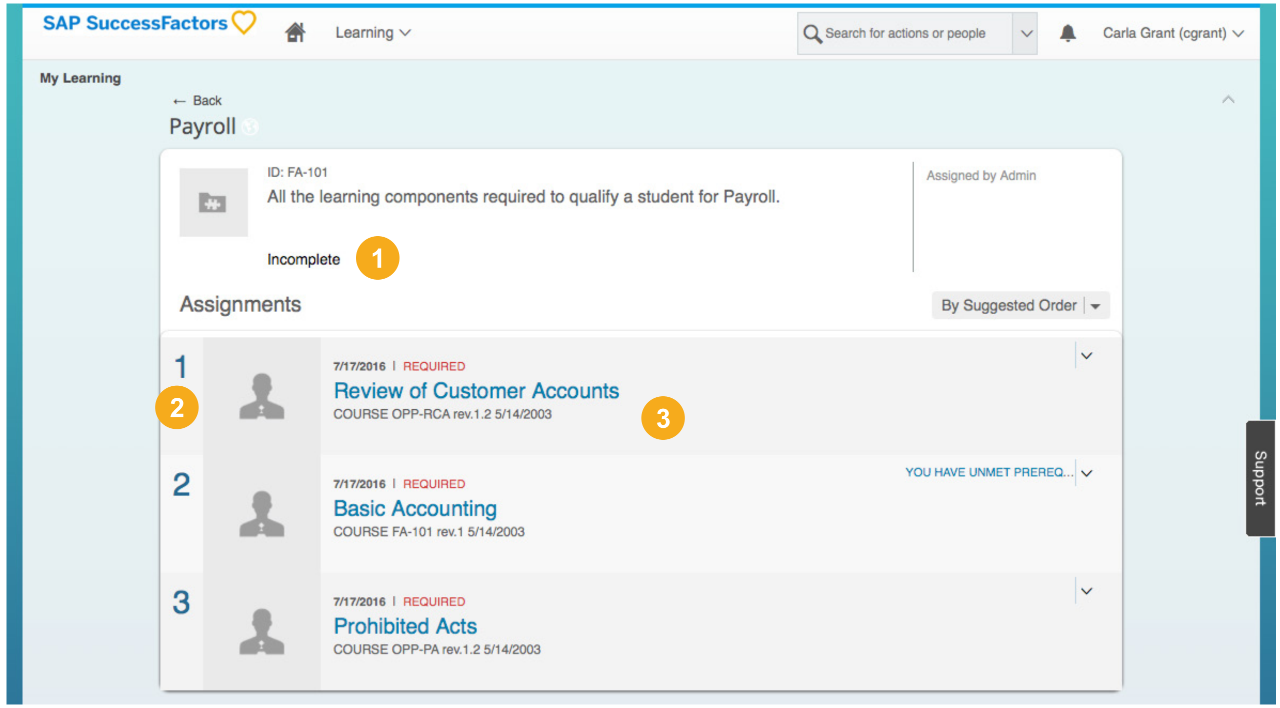


Filter & Narrow

The ***Narrow Courses*** area of the catalog search or browse allows you to instantly filter the results. After you apply an instant filter, the system allows you to click the ***Clear*** (for the filters in that section) or the ***Clear All*** (for all filters in all sections) hyperlinks. For instance, clicking a category or a subject area displays items assigned to that category or subject area.

Learn: **Learning Curriculum**

Administrators and managers may assign curricula to employees as part of their learning and development. A curriculum lists all the courses and actions to complete the learning. **NOTE:** When an employee is assigned a curriculum, the system automatically assigns the learning items to the to-do list (My Learning Assignments) but does not register the employee for the required courses.



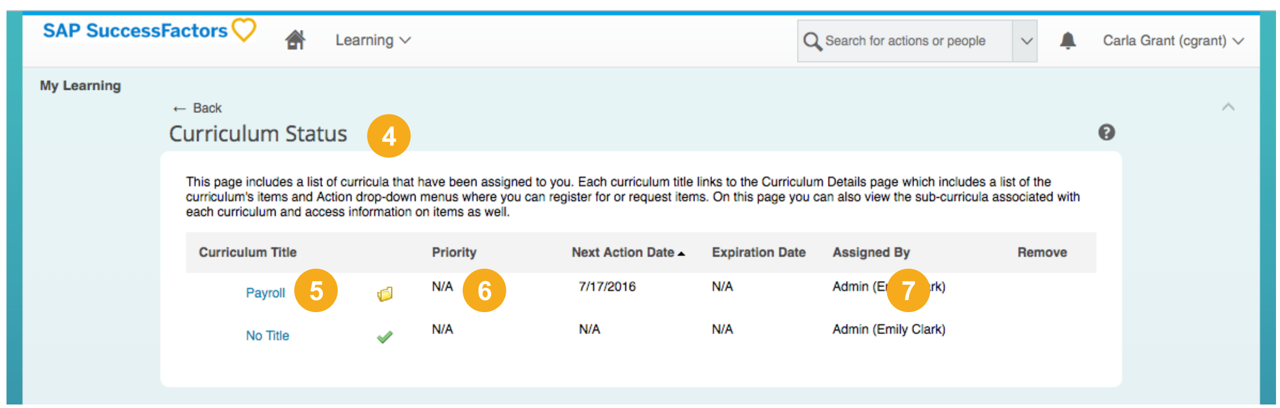
Curriculum Detail

1. Curriculum status and assignment is listed for the course.
2. Courses and content objects are listed as assignments in the suggested order.
3. Each course has its own status and appears independently on the My Learning Assignments tile.

Curriculum Status

Curriculum Status lists the current status of all assigned curriculum.

4. Click ***My Curricula*** tile to view ***Curriculum Status***. Curriculum Status lists the current status of all assigned curriculum.
5. Click on a curriculum title to view the course details
6. Details include an assigned priority, date of next action and who assigned the curriculum.
7. Self assigned curriculum may be removed by the employee.



Curricula

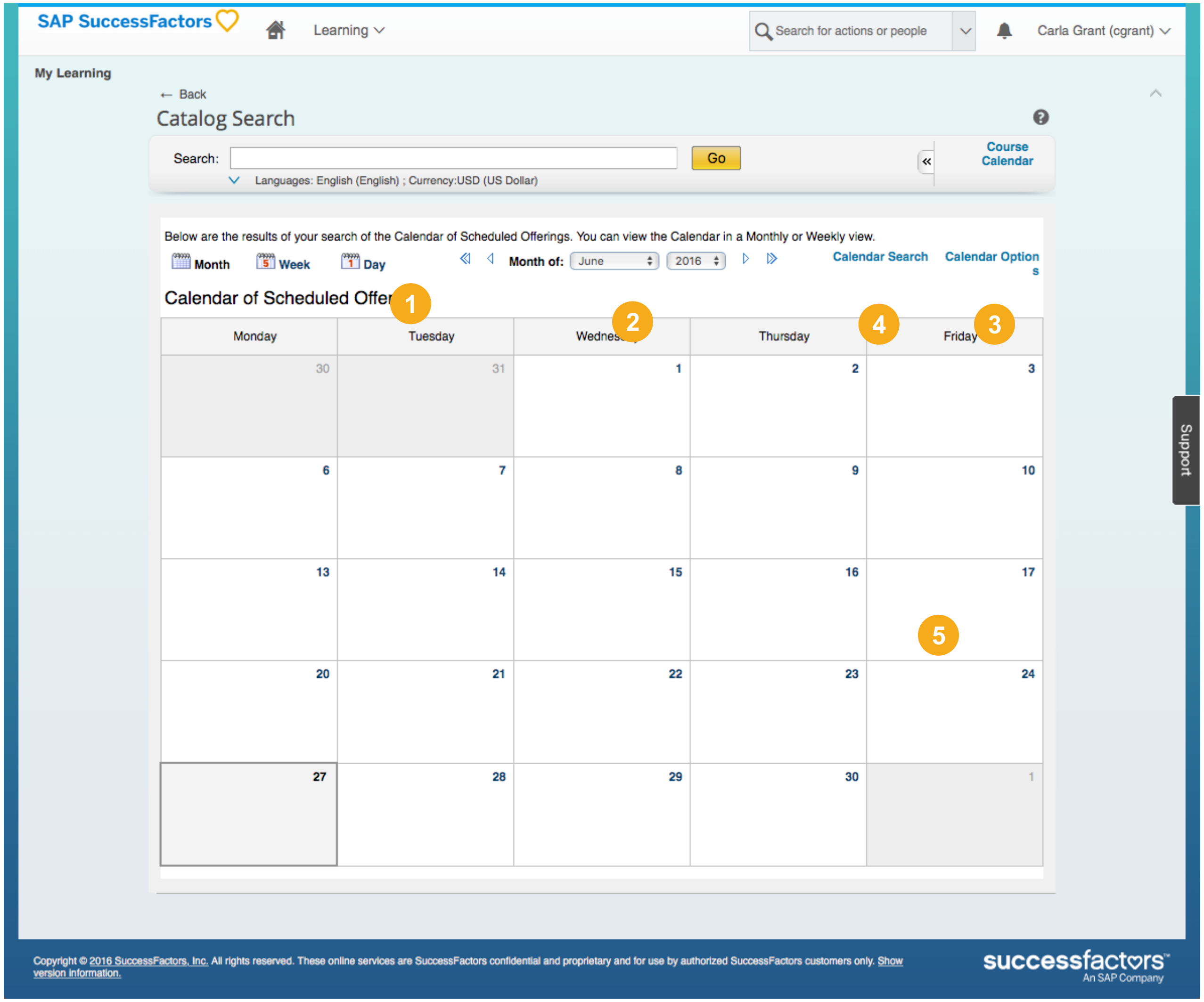
A Curriculum is a grouping of one or more Items for the purpose of assigning and tracking as a single entity. Curricula allow each related Item to have a required date and a retraining date for Items that must be repeated on a recurring basis.

Step by Step: Calendar Search

The calendar displays what Instructor Led Training (ILT) is available on each day. The ILT scheduled offerings (sessions) are grouped and displayed by their subject area. Click the subject area link to view the scheduled offerings and register to your preferred selection.

Select the ***Course Calendar*** link to access the course calendar view.

1. Click ***Month* | *Week* | *Day*** to view the calendar in that mode.
2. Select the month and year to view a specific time period.
3. Click ***Calendar Options*** to set calendar display preferences.
4. Select ***Calendar Search*** to filter items in the calendar that match search criteria.
5. Click a date to display the day view of the calendar or click the segment title to view segment details.



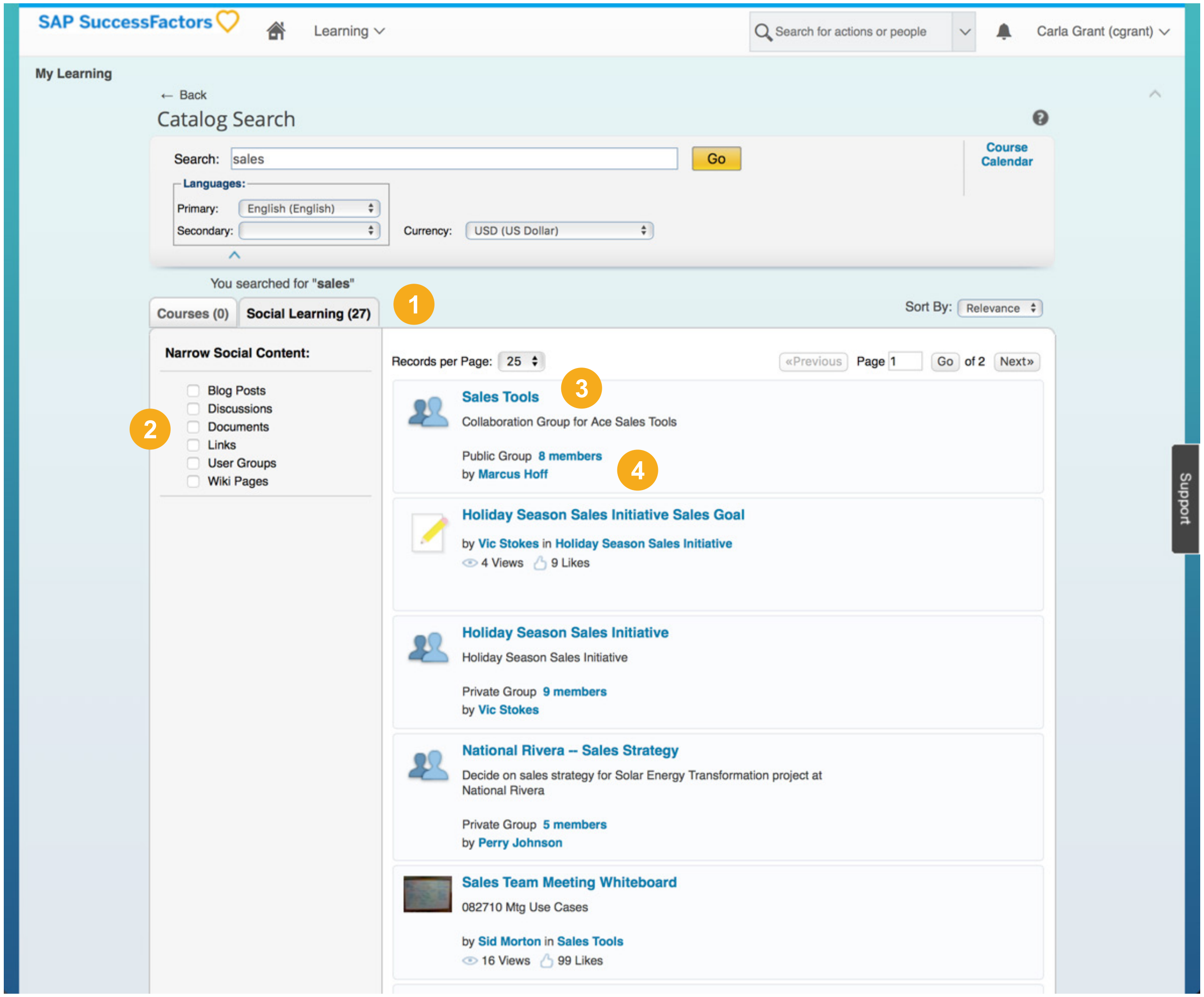
Learn: **Social Learning**

Social Learning, powered by SAP Jam provides easy content creation, sharing, discovery, and social networking combined with workplace communities.

- Fostering on-going, continuing education. Continue assignments and stay connected to learners through a dedicated community.
- Enabling peer-to-peer support and collective management of best practices, eliminating duplicate work efforts, reducing project completion time, and increasing productivity.

With the learning implementation you are granted access to the SAP Jam collaborative learning space. Social learning provides:

1. ***Social Learning*** channels are integrated into the learning catalog search.
2. Use ***Narrow Social Content*** to filter content by social content types.
3. Select the content title to view the content on SAP Jam.
4. Select the name or group on the content post to connect to people with common job roles, skill sets and interest.



Registration

A scheduled offering is a course or instructor-led item offered at a specific date and time. A registration using the SuccessFactors Learning reserves a seat when you are registered for the offering.

SAP SuccessFactors

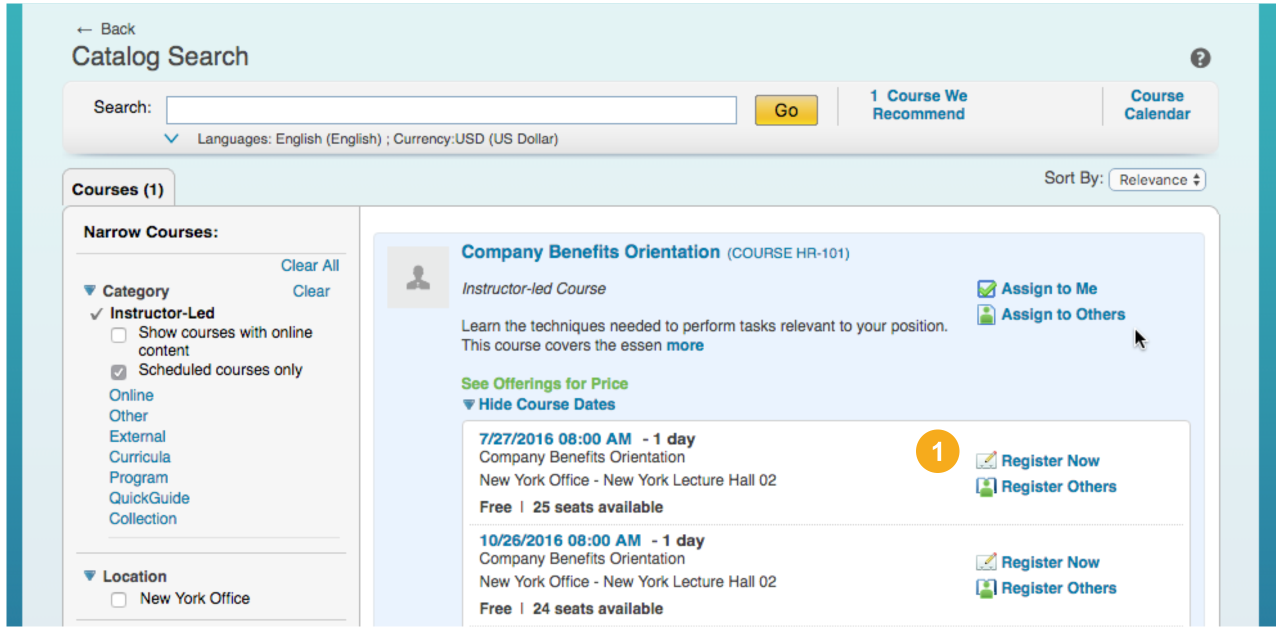
Step by Step: Registrations

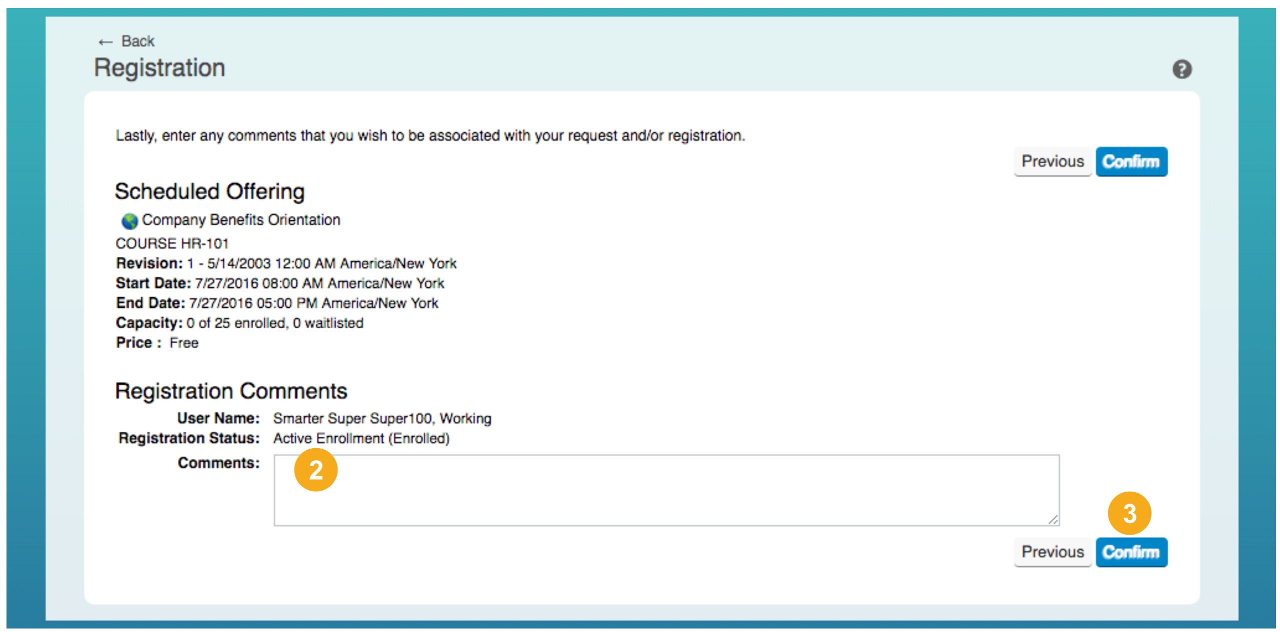
Registration provides you with all of the relevant information about a specific scheduled offering. Registrations are required to enroll a user in a specific offering.

You can also register for some courses directly from the Learning Catalog search results. From the Learning Catalog or Learning Assignment:

1. Click ***Register Now*** to display the Registration screen.
2. Enter any comments (special needs, requirements, etc.) about your registration in the Comments textbox on the Registration screen.
3. Click ***Confirm*** to confirm the registration.

NOTE: Courses that do not require approval or scheduling may be launched directly from the assignment without registration.





Common Tasks: **Registration**

Request Schedule

To request a schedule:

1. Select the item from the catalog or learning assignment.
2. Expand the ***request a schedule***.
3. Enter the ***need by date*** and ***reason*** (optional).
4. Click ***Request***.

View Registration

To view course registration:

1. Locate the course in ***My Learning Assignments***.
2. Review the current status.
3. Click ***View Registration*** to view additional details regarding the registration.

Registration Basics

Registration details include:

1. Course information
2. Assignment information, including who assigned and assignment type.
3. Current Registration information
4. Available Offerings for alternative schedule for the course
5. Request schedule details

Change Registration

To change a registration on your schedule:

1. Select the item from the catalog or learning assignment.
2. Expand the ***Available Offerings*** schedule.
3. Review the additional offerings.
4. Click ***View Details*** to register for a specific course.
5. Click ***Waitlist*** to register for a course that is current full.

Withdraw Registration

To withdraw a registration on your schedule:

1. Select the item from the catalog or learning assignment.
2. Expand the ***Current Registration*** schedule.
3. Click ***Withdraw***.

Assign to Me

Courses from the catalog can be self assigned to My Learning Assignments. **NOTE:** An assignment does not register, approve, or schedule you for a course. To assign a course listed in the Learning Catalog:

1. Hover your mouse over the course in the Learning Catalog and click the ***Assign to Me*** link that pops-up. The course is added to the assigned ***My Learning Assignments***.

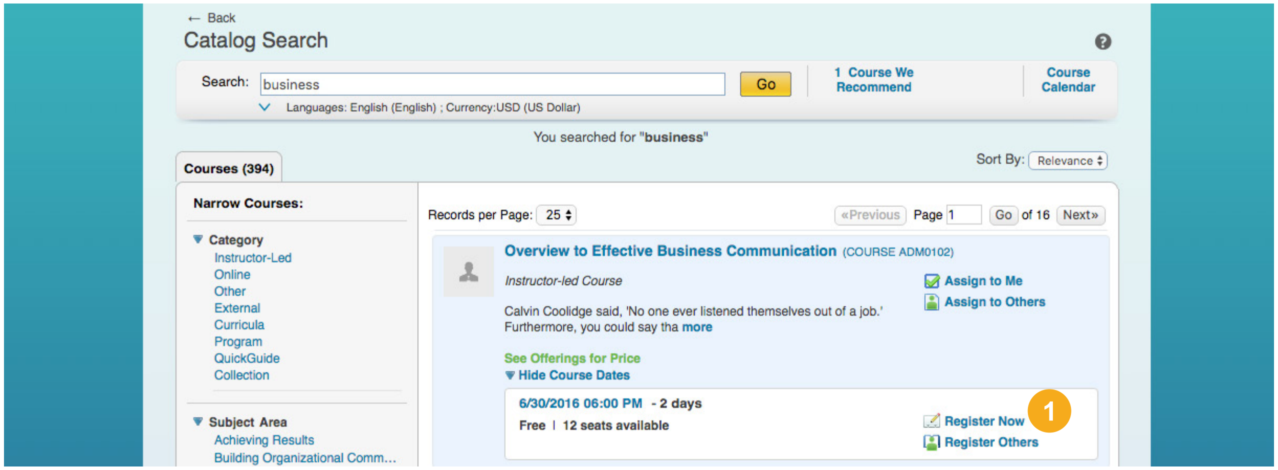
Step by Step: **Learning Approvals**

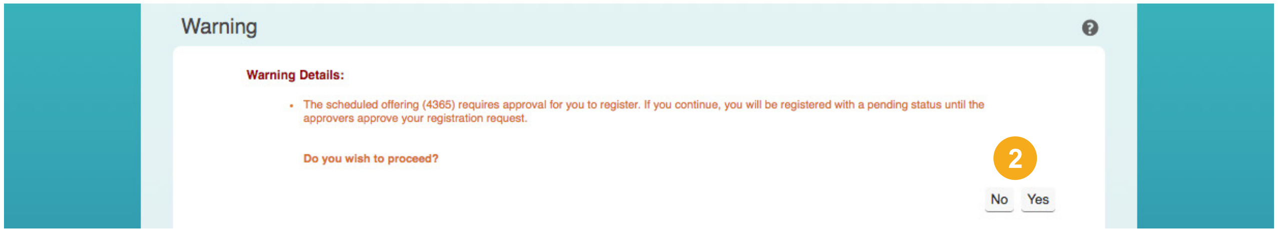
Some courses require manager approval prior to completing registrations. Approval requests are submitted to the one up manager. Courses requiring approval are listed with a Pending Approval status. Once approval or denial decisions have been made, notifications are sent to employees.

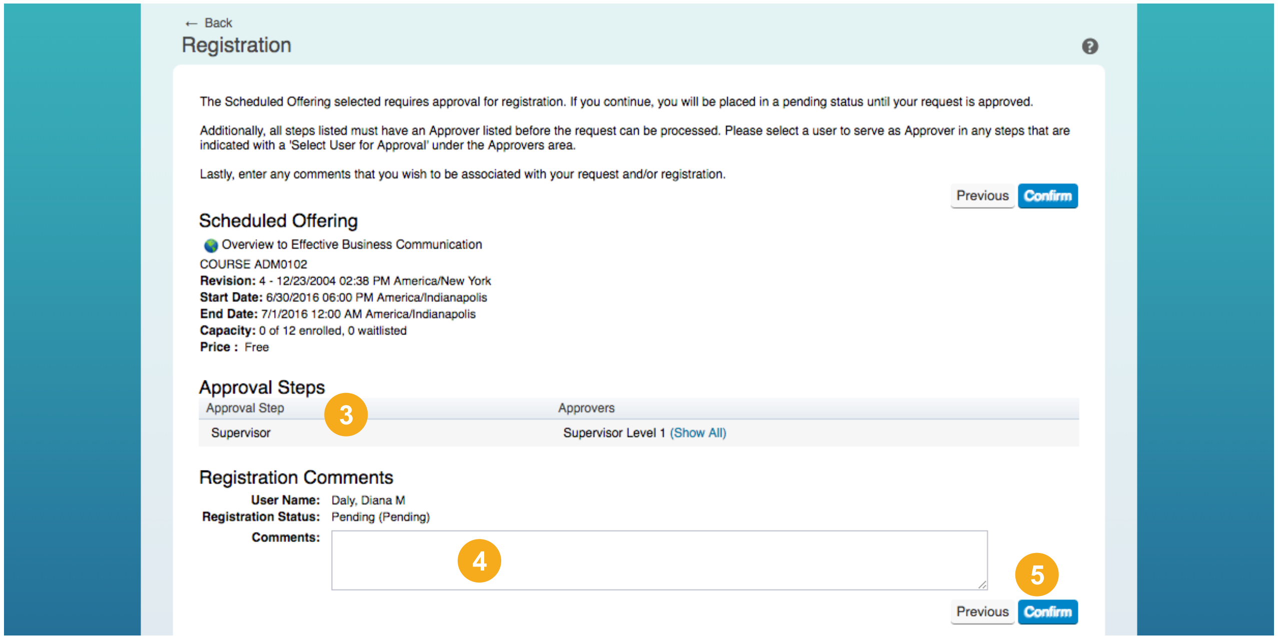
For courses requiring approval:

1. Select ***Register Now*** from the course details page.
2. A warning message indicates that the course requires approval for registration. Click ***Yes*** to continue.
3. The approval workflow is listed by default with the approvers listed.
4. Enter ***Comments*** to support the request.
5. Click ***Confirm***.

The course is added to ***My Learning Assignments*** with a ***Pending Approval*** Status.







Step by Step: External Request

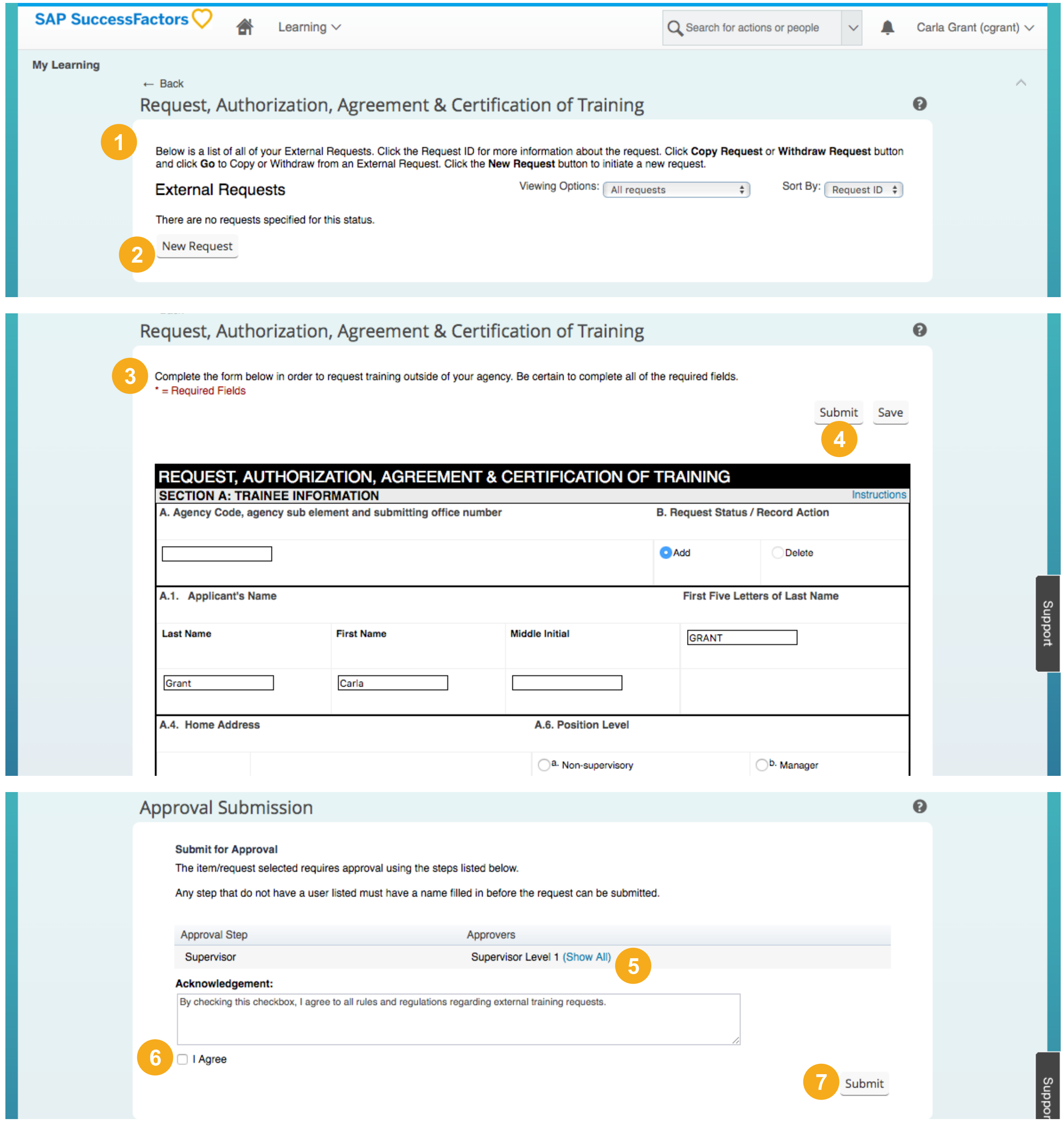
From the ***My Learning*** page, click the ***External Requests*** quick link.

1. View your list of external requests and details about each request submitted.
2. Click ***New Request*** to create a new training request form.

New Request

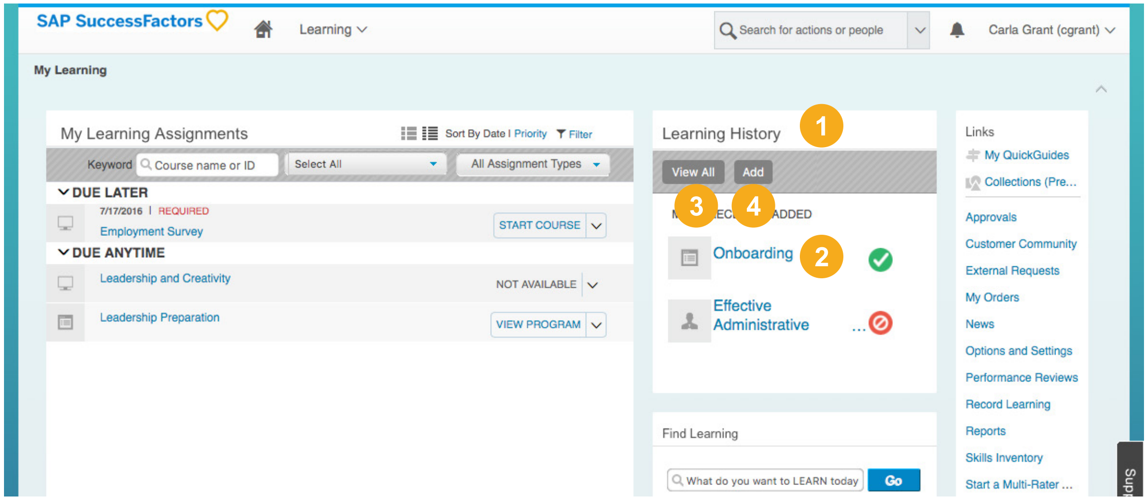
Before completing the request form, it is recommended that you review the form to determine the required fields, indicated by red asterisks(*). This will assist you to determine the information you need to know in order to complete and submit the request. Read through the provided instructions for more information.

3. Complete all required fields (*). You will not be able to submit without populating all required fields.
4. After all required fields are populated and you clicked ***Submit***, the form progresses to the approval process.
5. Click ***Show All*** to review the approvers.
6. Once you have examined the approval process you must agree to the acknowledgment. Check the ***I Agree*** checkbox.
7. Click ***Submit*** to complete the process.



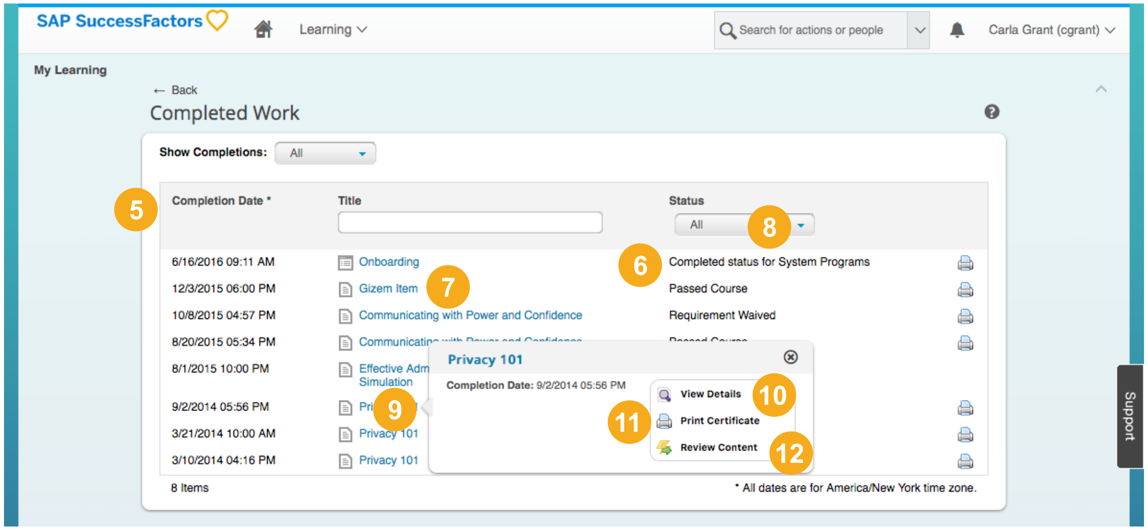
Step by Step: Learning History and Completed Work

Learning History provides a view of completed courses. Here you are able to track and manage learning, view the courses you have completed, and print certificates. When you complete a learning activity (for example, you complete a course or attend an external event), the system saves it to your completed work. Your completed work becomes a historical list of all the activities that you have completed.



Learning History Tile

1. The Learning History tile on the Learning Home page provides a user with a list of recently completed work.
2. Select a title to view the details of the completed course.
3. Clicking the ***View all*** link takes the user to their Completed Work page. (see below)
4. You can record completion of external events directly from the Learning History tile by selecting ***Add*** from the tile.



Completed Work

5. Completed Work lists the courses by Completion Date, Title, and Status.
6. Use the ***Show Completions*** to filter the completed work displayed.
7. Use ***Title*** to search and filter course work by keywords in the title.
8. Select ***Status*** to filter completed work by the listed status.

Complete Work Course Details

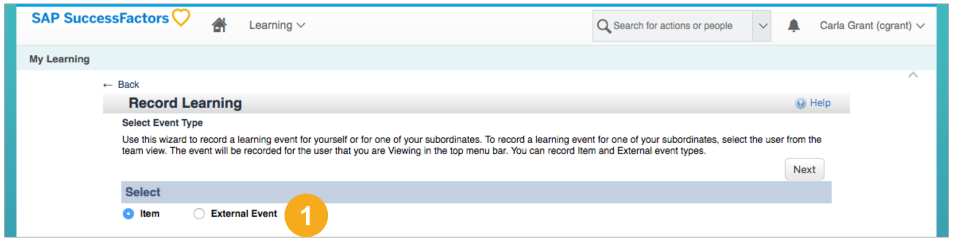
9. To review details for the completed course, hover over the course title. The completed course hours will be displayed.
10. Select ***View Details*** to view the complete registration information for the course.
11. Select ***Print Certificate*** to print a certificate of completion for events.
12. Select ***Review Content*** to re-launch the course.

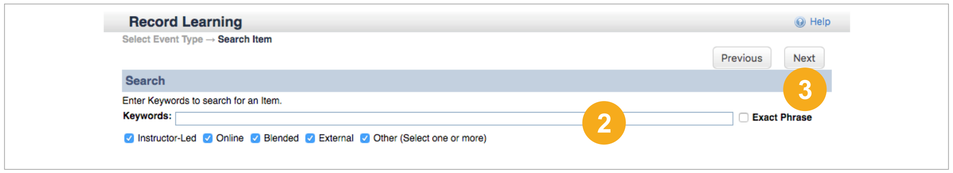
Step by Step: Record Learning

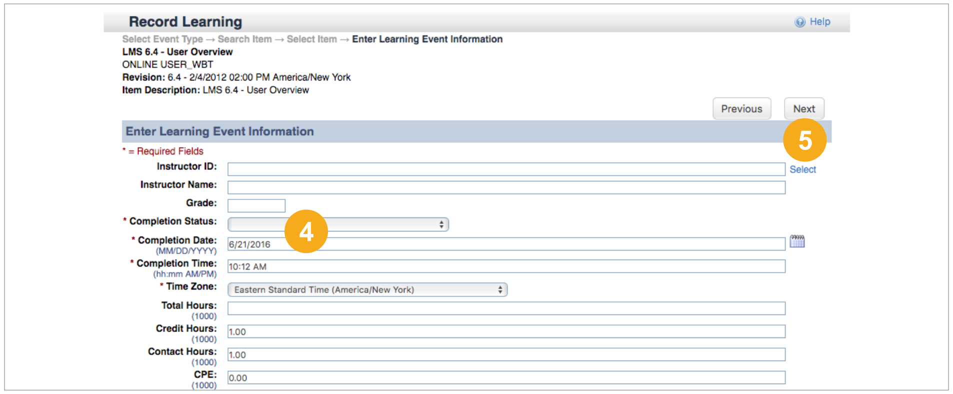
SuccessFactors Learning allows you to record learning events that take place outside the system. Employees and managers may add learning events to learning history.

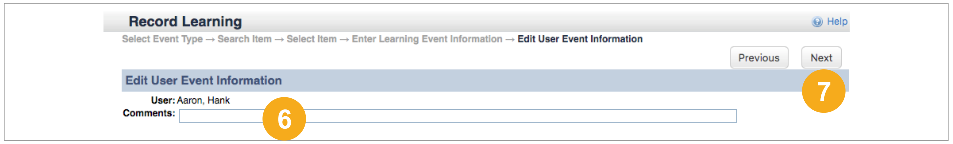
My Learning > Links > Record Learning

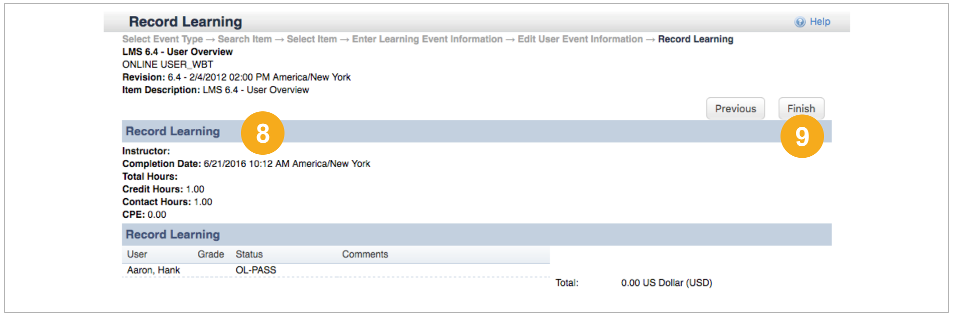
1. Select either ***Item*** or ***External Event*** as the Event Type, and click ***Next***.
2. Search for keywords related to the item or learning event to be recorded, and click ***Next***. Review the list of search results.
3. Click ***Next***. Select a course that closely resembles the external learning event. Click ***Next***.
4. Complete the details of the learning event by entering the required completion fields:
   - ***Completion Status***
   - ***Completion Date***
   - ***Completion Time***
   - ***Time***
5. Click ***Next***.
6. Add Comments regarding the external learning event. List the name of the event. Users in compliance areas should remember that comments will appear on audit reports.
7. Click ***Next***.
8. Review the Learning Event information.
9. Click ***Finish*** to add the learning event to Completed Work.











Certificates

To print a certificate for a completed course:

1. Hover mouse over a completed work learning event.
2. Select ***Print Certificate*** from the list of options.
3. SuccessFactors Learning generates a PDF in a new browser window.

Training Planner

The Training Planner enables you, your managers, and training managers to get a better idea of the amount of training each organization needs. You and your manager can submit training requests, which are reviewed by a training manager. Training requests can be internal items or external training requests.

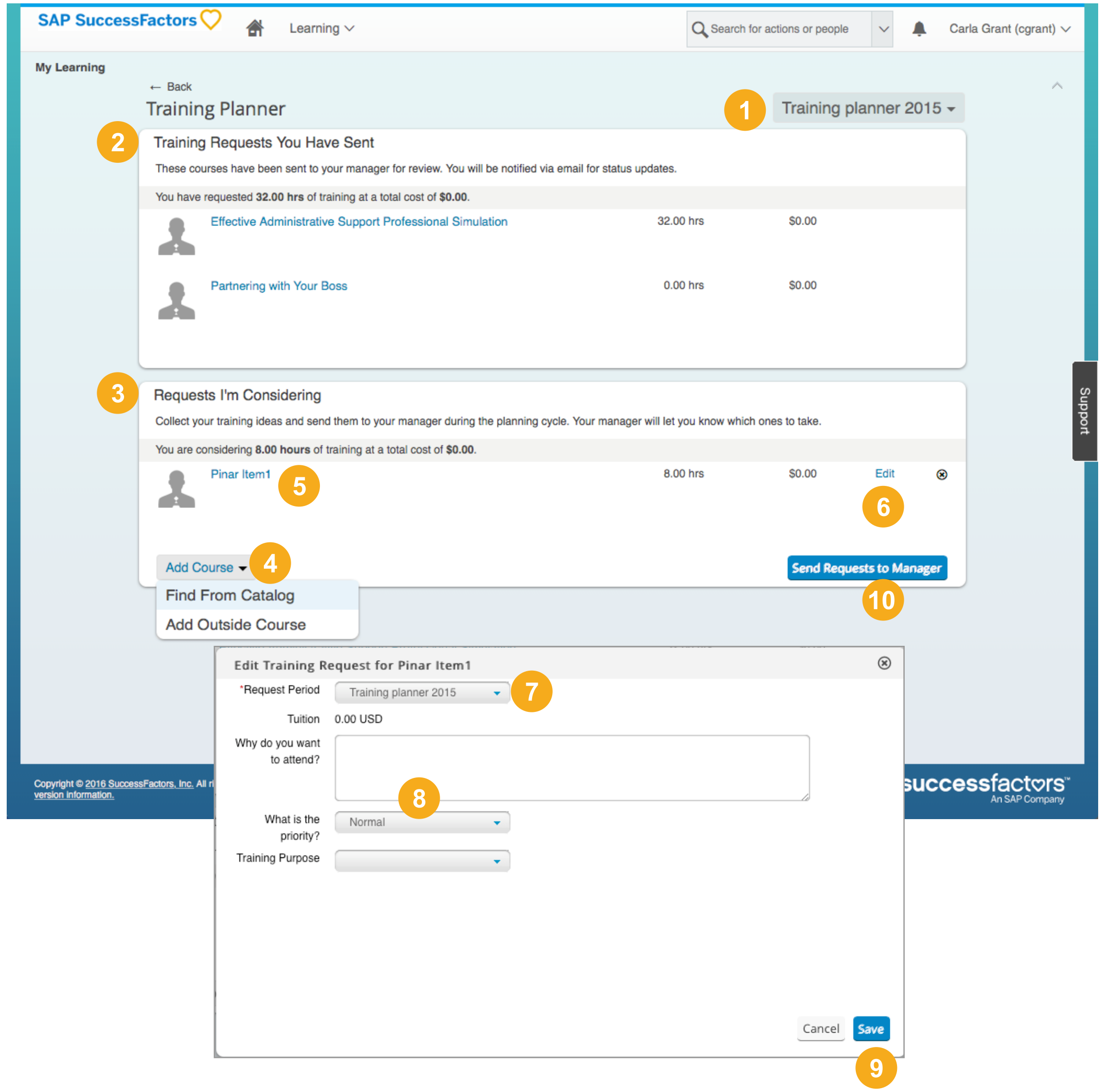
SAP SuccessFactors

Learn: Training Planner

You and your manager may use the training planner to submit training requests, which are reviewed by a designated Training Manager in the Training Planner. To get started, select the ***Training Planner*** from the quick links menu.

1. Select the time period for the training plan.
2. Select ***My Requests*** for a specific time period to view the courses requested and under consideration.
3. ***Requests I'm Considering*** lists all your training ideas and allows you to collect and draft your training ideas before submitting them as requests for approval.
4. Select ***Add Course*** to either ***Find From Catalog*** or ***Add Outside Course***.
5. Complete the details of the selected course request and add comments. The course is listed under the ***Requests I'm Considering***.
6. Click ***Edit*** to edit the training request before sending it to the manager. Editing allows for moving a course request to a different time period, editing the rationale for taking the course, or updating costs.
7. Use the drop-down menu to select the ***Request Period*** during which the training takes place.
8. Enter a description as to why you want to attend the training you are requesting. Use the drop-down menu to select the ***Priority*** of the request.
9. Click ***Save*** to add the course to your training plan.
10. Click ***Send Requests to Manager*** to submit the training plan to the manager. The plans are reviewed by a designated Training Manager in the Training Planner.

Courses submitted for review are listed in the ***Training Request You Have Sent*** section.



Request External Training from the Catalog

You may also request training that is not in the catalog. Select ***Add Outside Course*** from the Add Course drop-down. Complete the details including additional information including course title, vendor, location, and schedule.

QuickGuides

QuickGuides allow end users to create a step-by-step "how to" on any topic.

SAP SuccessFactors

Learn: QuickGuides Introduction

QuickGuides are concise and engaging digital instructional material that can be accessed anywhere, at anytime from multiple devices. Both administrators and permissioned end users may publish QuickGuides into the organization's catalogs.

1 Authoring QuickGuide

Users permissioned as QuickGuide Authors will see a ***My QuickGuides*** link on the My Learning page. Clicking this link will take the user into the area of the LMS where they can create and manage their own QuickGuides.

2 Accessing Published QuickGuides

Any user in the organization may view QuickGuides in the catalogs they have access to. Users may search for quick guides using ***Find Learning*** or select ***Browse all Courses*** and select ***QuickGuides*** from the Category area to view all QuickGuides.

3 My QuickGuides

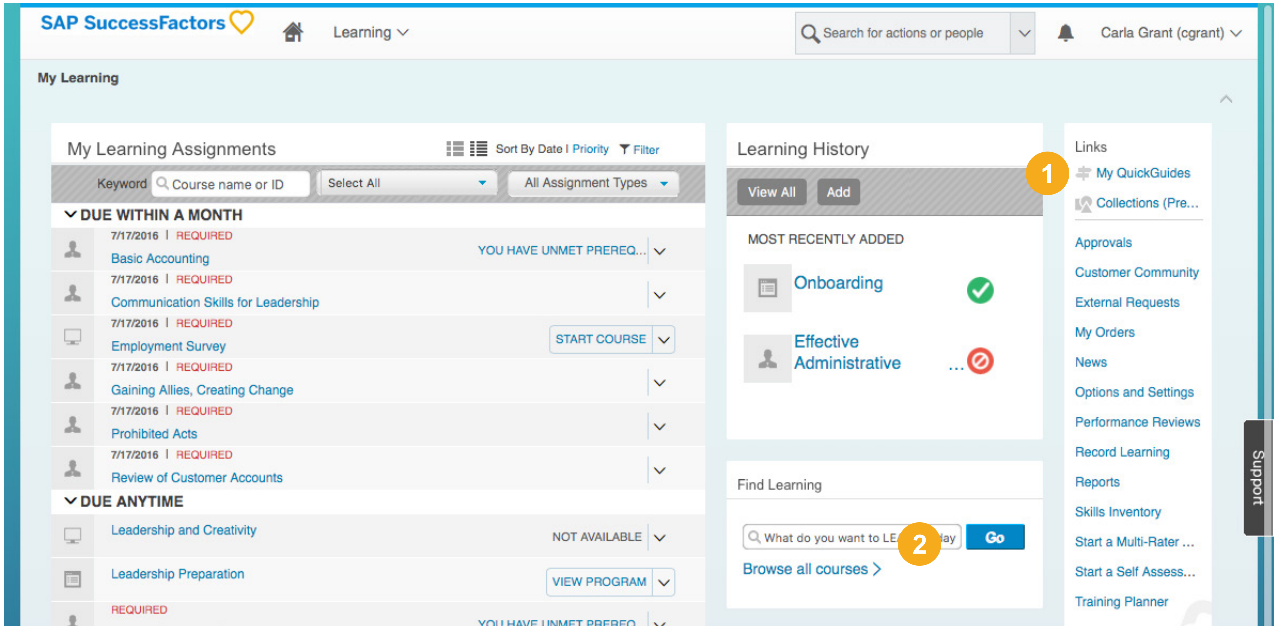
Once a user is granted QuickGuides permissions, the user can create QuickGuides from Learning or by using the mobile app. QuickGuide descriptions are searchable in the catalog and displayed when launching the guide.

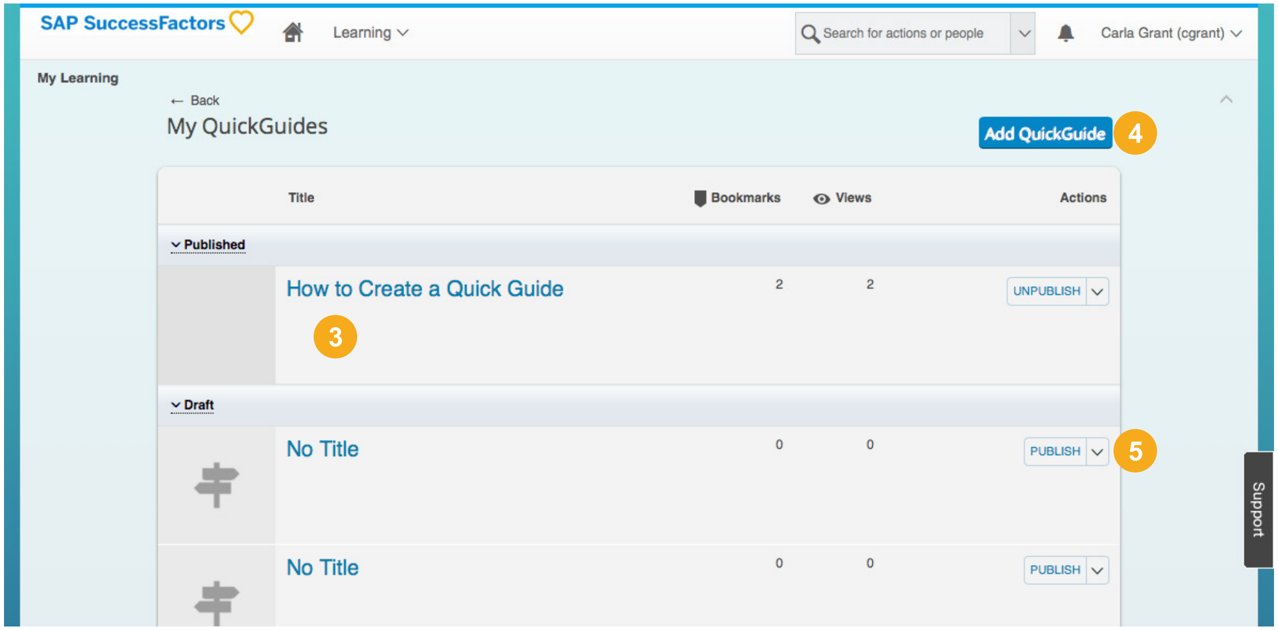
4 Create a Quick Guide

Click the ***Add QuickGuide*** button to step through process of creating a QuickGuide.

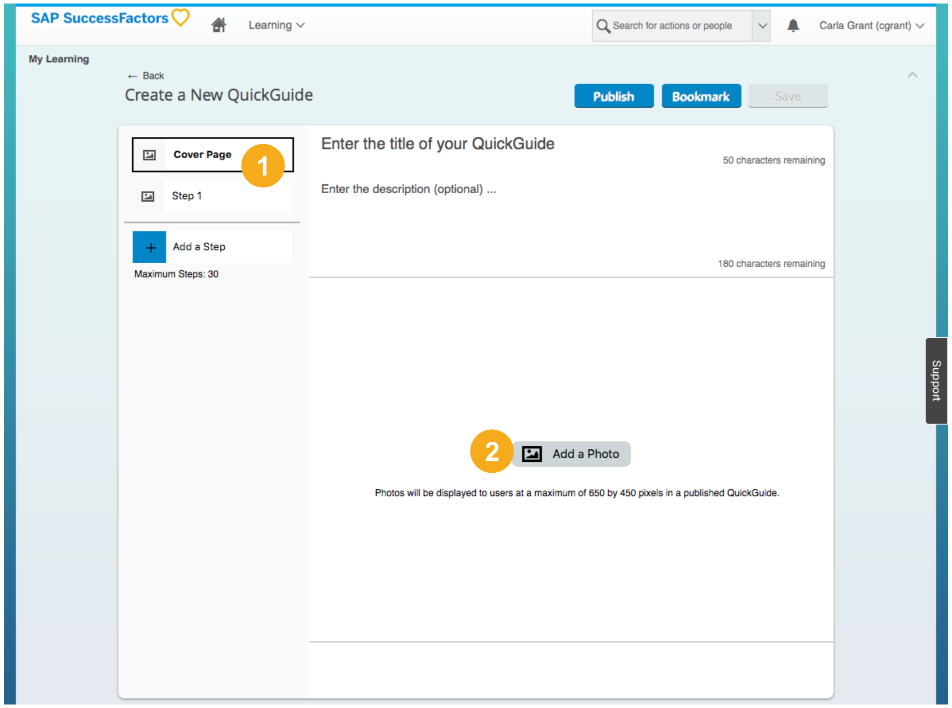
5 Manage QuickGuides

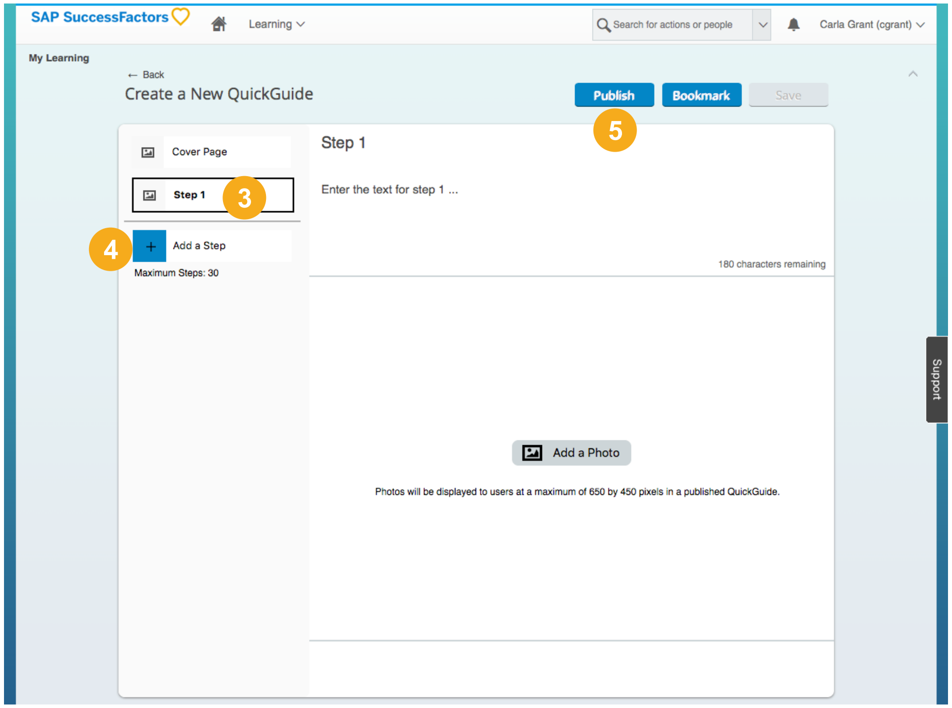
QuickGuides created by the author are listed on My QuickGuides by title, and the number of views. Use the actions menu to ***Unpublish*** or ***Delete*** a QuickGuide. Users can also bookmark QuickGuides from search results or a launched guide.





Step by Step: **QuickGuides**





Create and Publish a QuickGuide

Admin Tools > Learning > My QuickGuide link > Add QuickGuide

1. Select ***Cover Page*** and enter a title in the textbox and add a photo for the cover page.
2. Photos will be displayed to users at a maximum of 650 by 490 pixels in a published QuickGuide.

Steps and Publish a QuickGuide

Admin Tools > Learning > Browse all courses link

3. Select ***Step 1*** and enter instructional text and an image to describe this process step. You also have the option to delete any step in the process.
4. Click ***Add a Step*** to add the next step in the process. Repeat this step until all process steps for the QuickGuide are complete.
5. When done, click ***Publish*** to publish the QuickGuide to a catalog.

Collections

Employees find great content, privately save knowledge collected from the Web but have no way to easily share it to others within the organization. Collections provides employees and managers the means to discover, curate, share and manage external content.

SAP SuccessFactors

Learn: **Collections Introduction**

Collections allows users to curate, group, and share external content. This feature enables employees to collect and organize Web content and make it easily discoverable by others within the organization.

1 My Collections

All of your created collections are listed. Click ***Add new collection*** to create a new collection.

2 Bookmarked Collections

View Collections you have bookmarked for quick access.

3 Recommended Collections

Displays your colleagues suggested collections.

4 View All

Select View All to view all available collections.

5 View Collection

Select the Collection to view the details.

6 View Curated Content

From the collection page, review all the curated content listed in the collection.

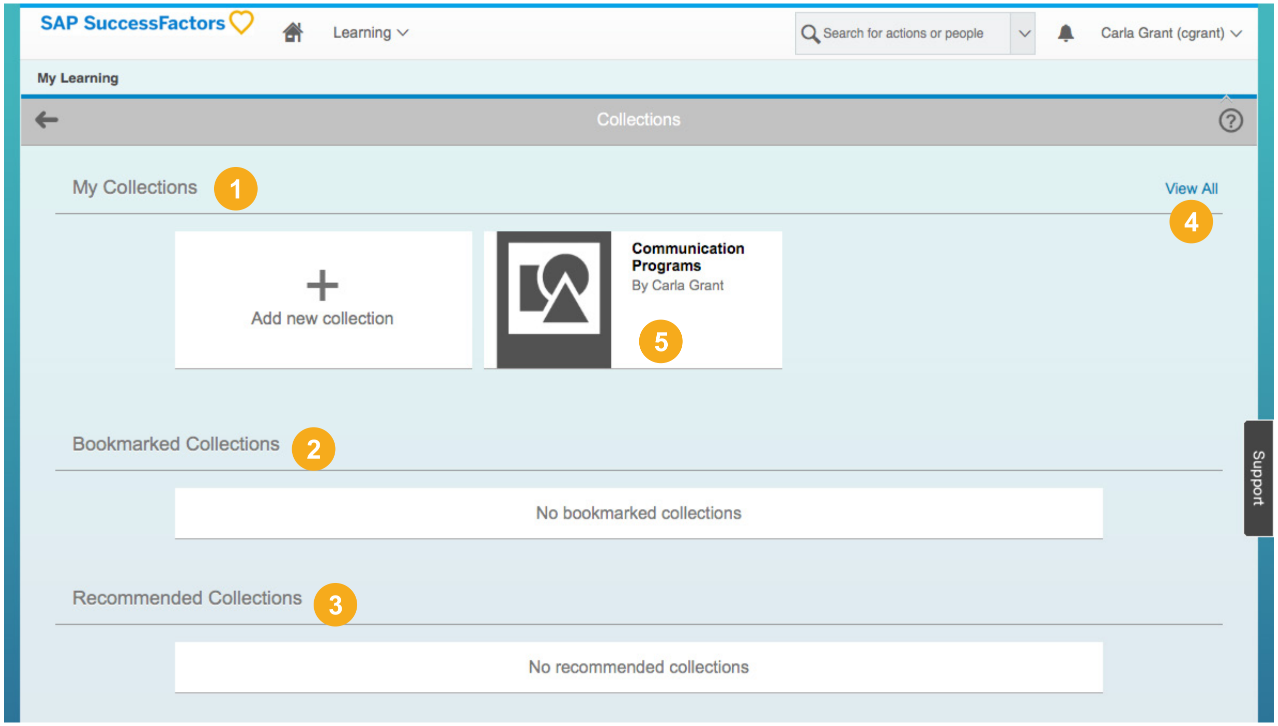
7 Manage Curated Content

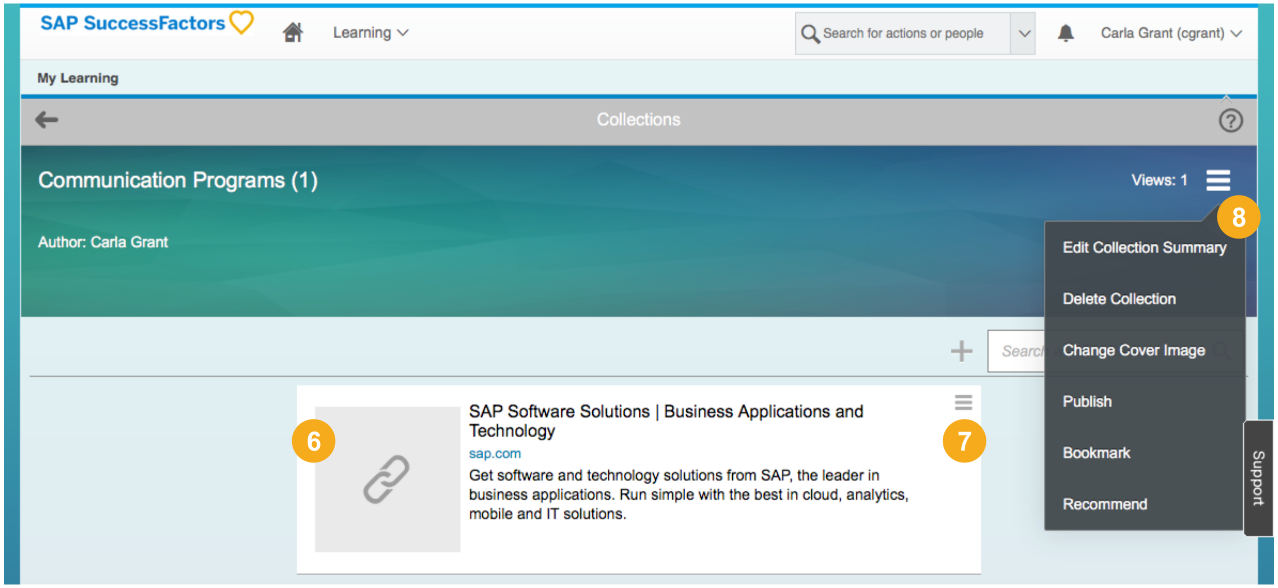
Select the menu to edit or delete the content.

8 Manage Collection

Select the menu to manage the collection:

- Edit the content summary for the collection.
- Delete the Collection.
- Change the cover image for the collection.
- Publish the collection (accessible across the organization)
- Bookmark the collection.
- Recommend the collection by sharing to other users.





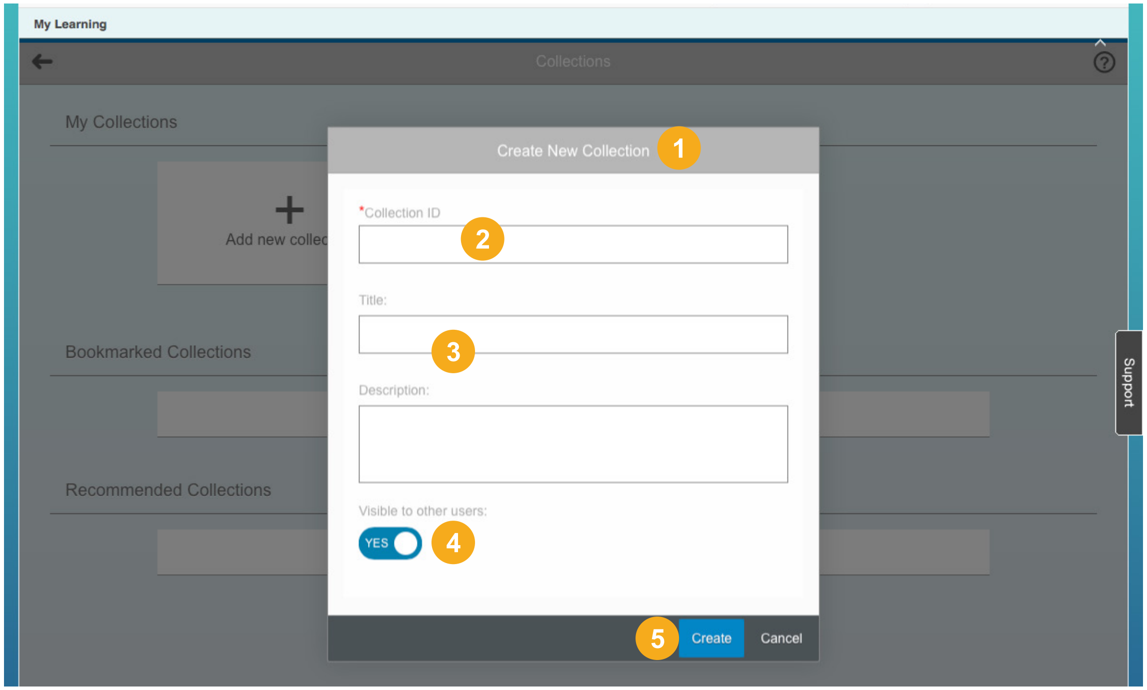
Step by Step: **Create a New Collection**

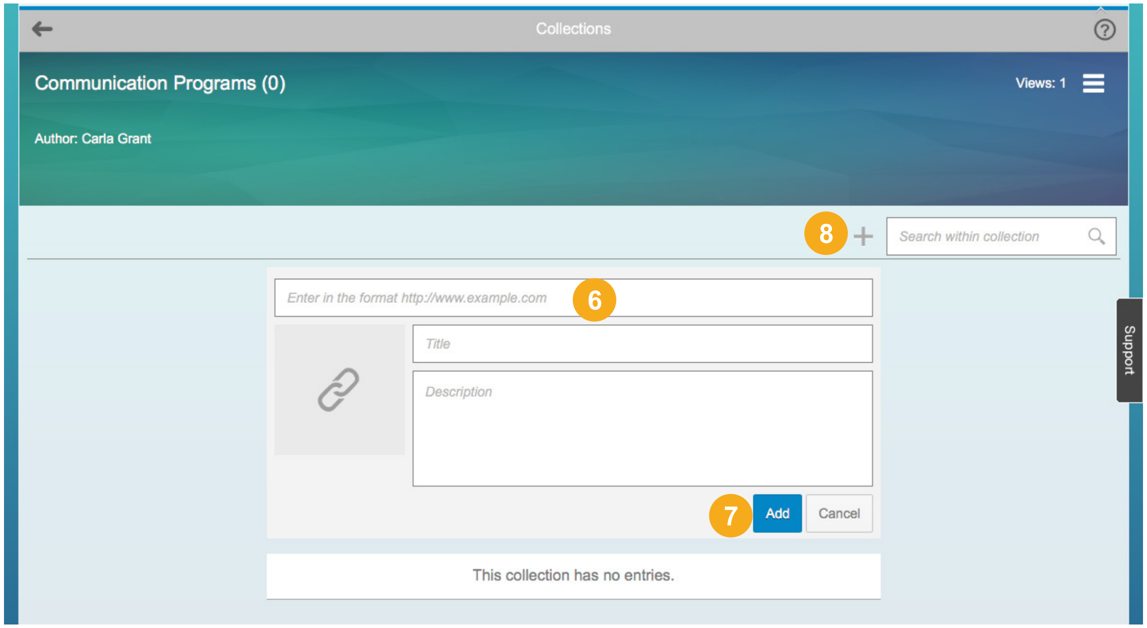
To add a new collection click ***Add new collection*** from the My Collections section.

1. The ***Create New Collection*** pop-up appears.
2. Enter the ***Collection ID***.
3. Enter a title and description for the collection.
4. Decide if you would like this collection to be visible to other users.
5. Click ***Create***.

To add content to the collection:

6. Enter the web address. Once entered the title and description should automatically appear from the website meta data or you enter your own title and description.
7. Click ***Add***.
8. To add another entry click **+**.





Learning for Managers

Managers are responsible for promoting employee development through training. Learning allows you to easily manage your employees' learning activities to ensure that they are engaged, productive, and successful in their roles.

Managers use Learning to view, assign, register and record learning events for their employees. My Team provides a workspace to access team members' records. From here, you can:

- Access the team viewer
- View employee's learning plan
- Take various actions using the manager links

Learn: **Manager Employee Tiles**

Managers use Learning to manage their own learning, and they use features on the Home page to manage team's learning.

1 My Employees Tab

My Employees tab manages the learning activities of direct and indirect reports.

- Managers use ***My Employees*** to access their learning activities and their direct and indirect reports' learning activities.
- The ***Learning Plan*** displays the items that the employee is required to complete, either on a one-time or recurring basis.
- All items shown are ones that the employee has not yet successfully completed.

2 Find Learning

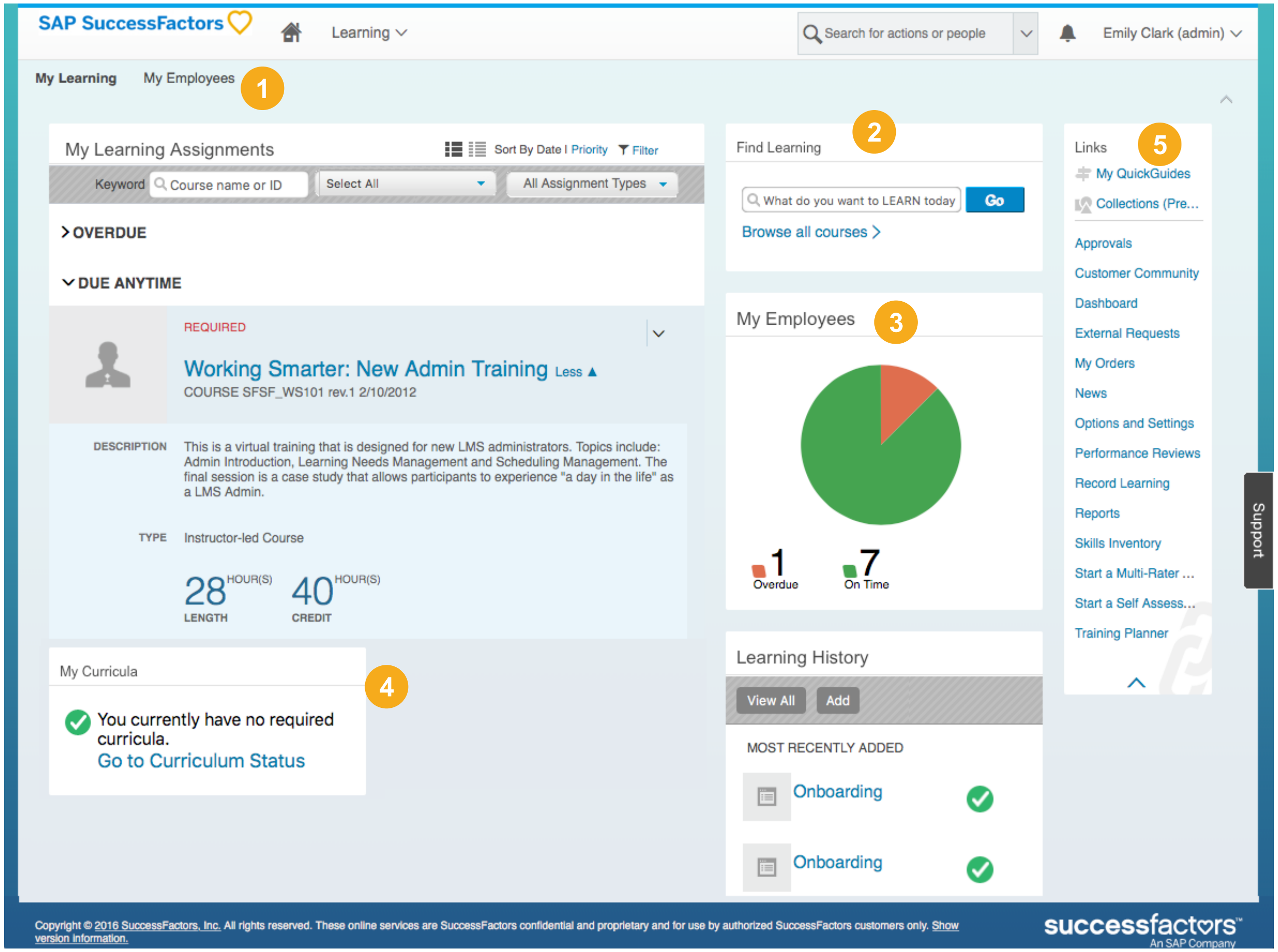
Use ***Find Learning*** to assign learning to team.

3 My Employees

Displays a list of your direct reports and the status of their learning items. ***My Employees*** tile displays a current view of your teams learning status. Click on the chart to access the ***My Employees*** tab.

4 Manager Notifications

Manager Actions and notifications are listed at the top of the manager's My Learning Assignments. Click the notification to view the action required.



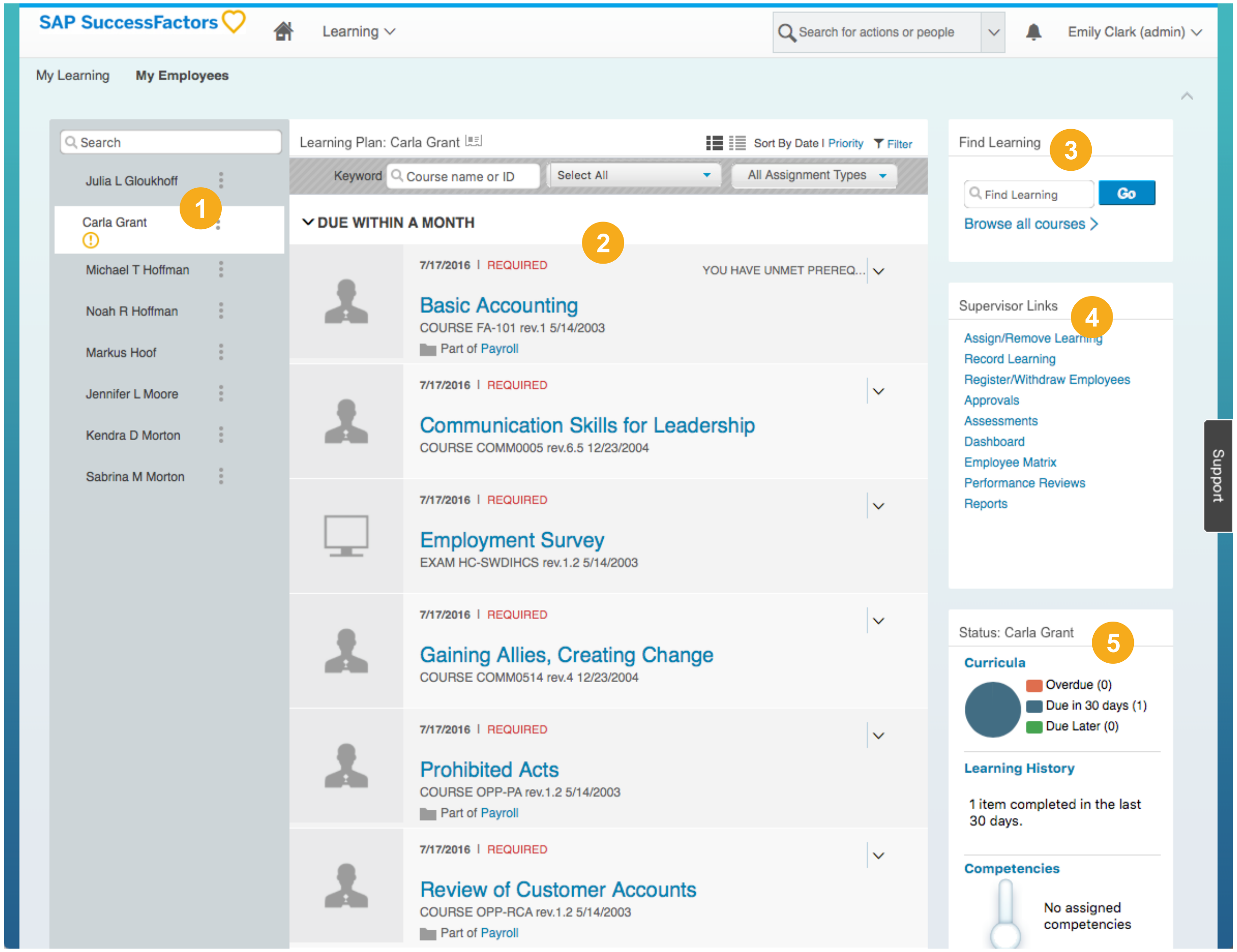
5 Links

As a manager you may use the Links tile to review ***Approvals*** for your team, ***Record Learning*** events for team members, and run ***Reports*** on your team. Links menu provides access to manager specific actions.

- Review pending Approvals submitted by direct reports.
- Record Learning events for team members.
- Run Reports on your team.

Learn: **My Employees**

Managers use My Employees to access their learning activities and their direct and indirect reports' learning activities. The Learning Plan displays the items that the employee is required to complete, either on a one-time or recurring basis. All items shown are those that the employee has not yet successfully completed.



1 Employee Hierarchy

Click an employee's name in the ***Employee Hierarchy*** menu to view their ***Learning Plan To-Do List***. If they have direct reports, this will reveal their names so you can also view and manage their learning.

2 To-Do List

Use ***Find Learning*** to assign learning to employees. The ***Learning Plan To-Do List*** provides a consolidated view of learning activities requiring action.

- All activities related to the employee are listed in one place.
- Tasks are listed and grouped by ***Due Date***.
- Use ***Search*** to locate a specific course.
- Use the ***Show*** drop-down menu to see specifics, for example, show current registrations, online courses, or surveys.

3 Catalog Search

Use ***Find Learning*** to add courses to your personal Learning Plan To-Do List. Enter keywords and click ***Go*** to perform a quick search or click ***Browse all courses*** to look through the catalog. The process for adding learning activities to your team's learning plans is discussed in the next section.

4 Supervisor Links

Use ***Supervisor Links*** to quickly go to different sections of the Learning module and manage your team's learning activities. Options include: ***Assign/ Remove Learning, Record Learning, Dashboard, Organization Chart, Register/Withdraw Employees, Approvals*** and ***Reports***

5 Track Status

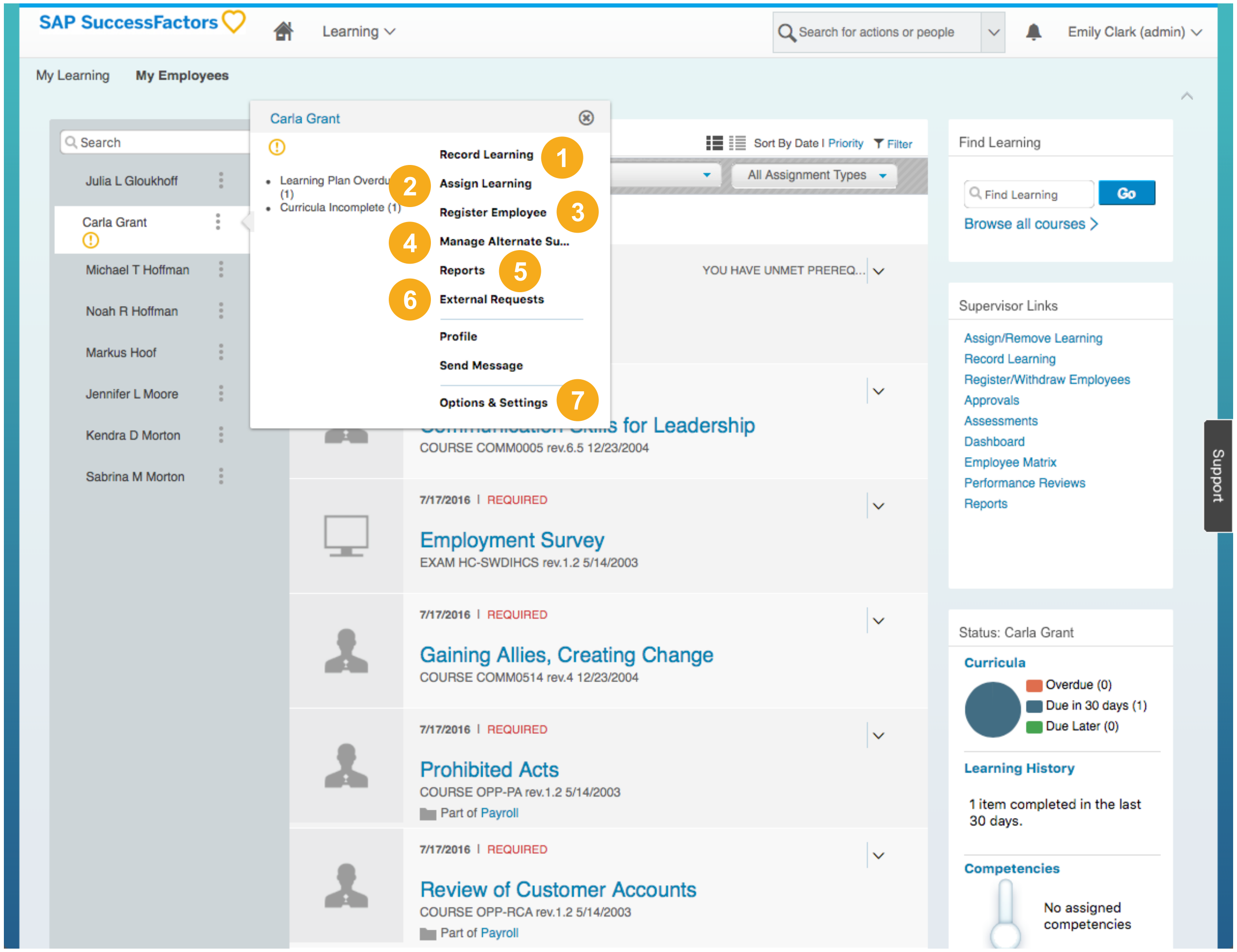
View Status updates tracking the selected employee's progress on learning activities.

- ***Curricula*** displays the employee's progress on assigned curriculum.
- ***Completed Work*** lists learning activities completed in the last 30 days.
- ***Competencies*** displays links to assigned competencies and development activities.

Step by Step: **Team Member Actions**

Hover your mouse over a name in the Hierarchy menu to take these actions:

1. Select ***Record Learning*** to enter learning events into the employee's learning history.
2. Select ***Assign Learning*** to search the catalog and assign learning to an employee.
3. Select ***Register Employee*** to register an employee for a course.
4. Select ***Manage Alternate Supervisor*** to assign alternate manager(s) to an employee. Either alternate or primary managers can complete the primary manager's tasks.
5. Select ***Reports*** to run reports on data such as learning history, learning needs (items currently on the learning plan), and curriculum status for the employee.
6. Select ***External Requests*** to review requests related to learning events such as an item, scheduled offering, or external event.
7. Select ***Options & Settings*** to view notification and time settings for the employee.



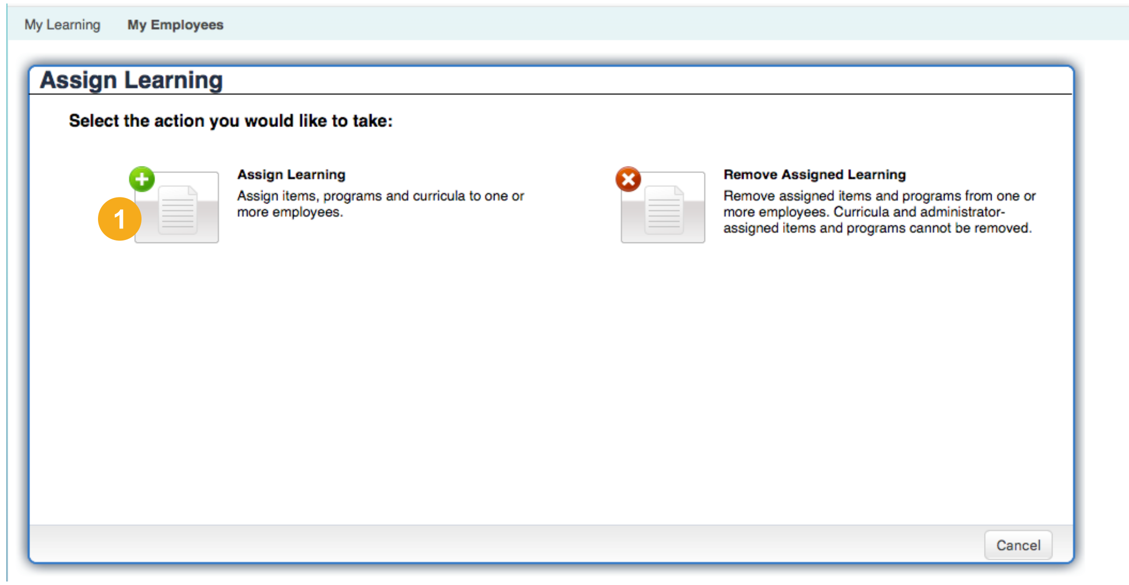
Step by Step: Assign Learning

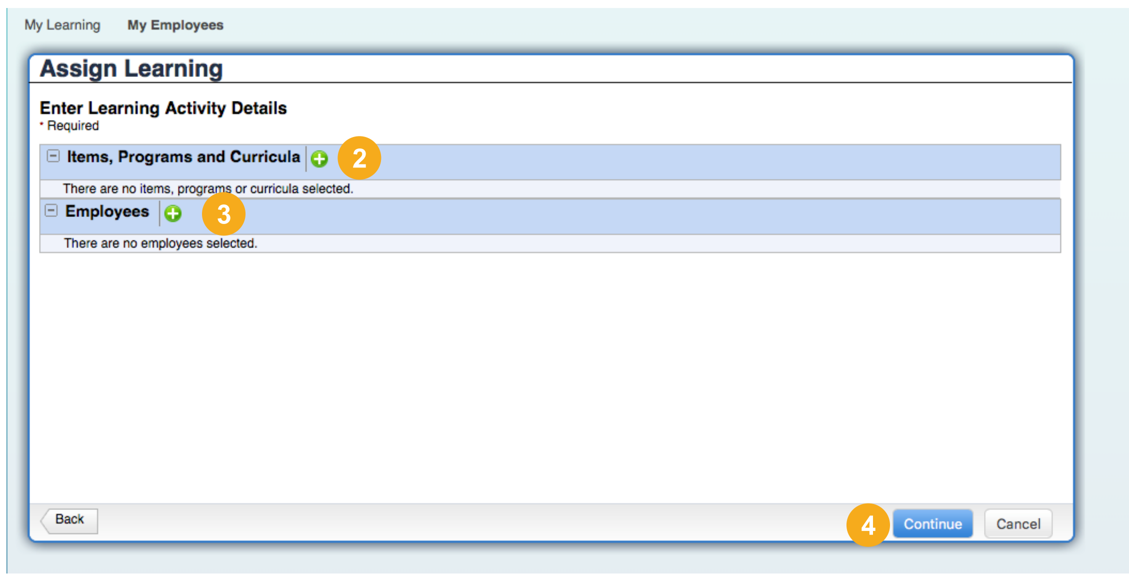
As a manager, you may add learning activities and curricula on your team's learning plans. Remember, an Item (course) is an assignable activity such as an instructor-led course or online training. Using the Assign/Remove Learning option, you can assign or remove one or more items to one or more employees. Only items that are in the catalog can be added. You can also remove items that the employee added to their own personal learning plan.

My Employees > Supervisor Links > Assign/Remove Learning

1. Select ***Assign Learning***.
2. Select the green button next to ***Items, Programs and Curricula***, to add Items and Curricula. The ***Select Desired Courses from Catalog*** window will appear. Hover over the course you wish to add and click the ***Select*** option.
3. To add employees, click the green button next to ***Employees***. Click check boxes to select employees and their subordinates, if applicable. Click ***Add*** to add the employees to the list of Employees. **NOTE:** To remove an employee from the List of Selected Employees, click the check box to select the employee and click ***Remove Checked***.
4. Click ***Continue*** when finished.

Verify the information and select ***Assign Learning***. A confirmation window will appear.





Remove Learning

There are three ways to remove learning:

- Use ***Assign/Remove Learning*** on Supervisor Links.
- Locate the course on the employee's Learning Plan. Click the title and click ***Remove*** from the course details.
- To remove a curricula, click the ***Curricula*** status and click the remove icon.

Common Tasks: **Register/Withdraw**

Register Learning

Managers can register (enroll) or withdraw employees into/from scheduled offerings on My Employees. Items and curricula that display are from catalogs that managers have access to - not the catalog that your employees have access to.

Managers may:

- Register employees in a scheduled offering
- Withdraw employees from a scheduled offering
- View an employee's Learning Calendar

My Employees > Supervisor Links > Register/Withdraw

1. Select ***Register Employees***.
2. Enter keywords to search for the scheduled offering. Click ***Next***.
3. Select the offering. Click ***Next***.
4. Click check boxes to select employees.
5. Use the ***Registration Status*** drop-down menu to adjust the registration status for each selected employee, if necessary. Click ***Next***.
6. Enter comments for each employee's registration, if necessary. Click ***Next***.
7. Confirm the registration details including any financial requirements. Click ***Next***.
8. Click ***Finish*** to register the selected employees.

Employee's Registration

After registering or withdrawing employees from scheduled offerings, view the employee's list of current registrations to verify the registration or withdrawal.

To view your employee's current registrations:

1. Select the employee.
2. Select ***Registrations*** from the ***Show*** drop-down menu.
3. Roll your mouse over the title to view the scheduled offering summary information.
4. Click ***View registration*** or ***View Details*** to see registration and scheduled offering details, respectively.

Withdraw Team

Managers may withdraw employees from registered courses.

Follow the same process as registration, selecting the employees and course to be removed.

My Employees > Supervisor Links > Register/Withdraw

1. Select ***Withdraw Users***. Click ***Next***.
2. Select the course offering. Click ***Next***.
3. The registered team members are listed. Click check boxes to select team member(s) to be withdrawn from the course. Click ***Next***.
4. Review the withdrawal information.
5. Click the Email Confirmation check boxes to select who will be notified about the withdrawals. In order for team members to be notified, click in the Users check box.
6. Click the check box to remove the assignment from the selected team member's learning plan.
7. Click ***Finish*** to withdraw the selected team.

Common Tasks: **Supervisor Links**

Manager Approval

Some learning activities require a manager's approval.

- Managers are notified of the approval requests.
- Requests are marked as pending until approved.
- Approvals do not denote registration.

My Employees > Supervisor Links > Approvals

1. All employee training requests pending review appear in this list.
2. Ensure the ***Enter Reasons for Approvals or Denials*** is checked so you can add comments to explain your decision.
3. Click on the course title to review the course details to help you make your approval or denial decision.
4. Choose the appropriate button to:
   - ***Approve*** the training request
   - ***Deny*** the training request
   - ***Skip*** approving or denying this request at this time
5. Click ***Next***.
6. Add ***Approval Reasons*** to the approved training request. Click ***Next***.
7. Click ***Confirm*** to complete the approval workflow.
8. Click ***Start Over*** to return to the Pending Approval page.

Manager Record Learning

Managers can record a learning event for themselves or for one of their employees. Types of learning events include an item or an external event.

1. Select the green button next to ***Item*** to add items to the Record Learning.
2. The ***Select Desired Courses from Catalog*** window will appear. Hover over the course you wish to add and click the ***Select*** option.
3. To add employees, click the green button next to ***Employees***.
4. Click check boxes to select employees.
5. Click ***Add*** to add the employees to the list of Employees.
6. Review the information listed under ***Item*** and ***Employees***.
7. Select the ***Completion Status*** from the drop-down menu.
8. Click ***Continue***.
9. This will bring you to the Record Learning Confirm Learning Details page. Click the ***Record Learning*** button to record the items selected.

Completed Work

Managers can view an employee's completed work list by opening an employee's record. Completed Work displays a list of items that the employee has completed and the dates the employee completed them.

1. Select the employee for whom you wish to view Completed Work from the team viewer.
2. Click the ***Completed Work*** status pod for the selected employee. The employee's Completed Work displays as a secondary page.
3. Select the ***Show Completions*** drop down menu to refine the list of completions to specific time periods (All, Before, After and Between).
4. The employee's completed work is listed in a table. Use the table to:
   - Select a column header to sort the table.
   - Enter a key word in Title to locate a specific course by name.
   - Select ***Status*** to refine the list of courses completed.
5. Select a course title to view the CPE, Credit and Contact hour details for the course.
6. Click ***View Details*** to review the full information related to the course completion.
7. Click ***Print Certificate*** to print a certificate of completion for the item
8. Click the close icon on the upper-right corner to close the window and return the My Employees view.

Manager Training Planner

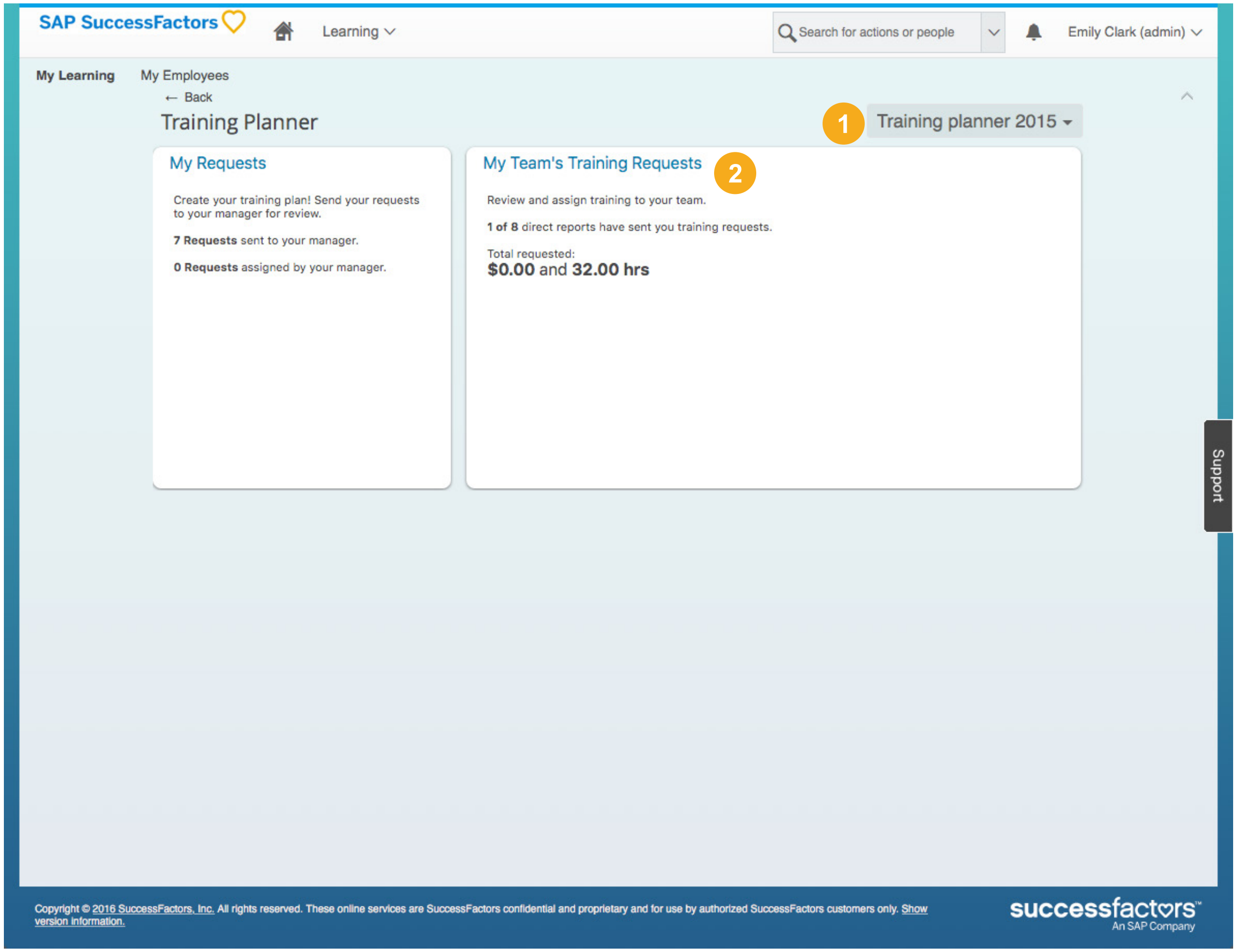
The Training Planner enables managers to get a better idea of the amount of training each organization needs.

SAP SuccessFactors

Step by Step: Manager Training Planner

Managers and employees the training planner to submit training requests, which are reviewed by a designated Training Manager in the Training Planner. To get started, select the ***Training Planner*** from the quick links menu.

1. Training Plans are organized by time periods; select the timing drop-down to view your training and your team members plans for the time period.
2. When an employee makes a request the overview provides only the information about the number of direct reports requesting and the amounts requested. Select ***My Team's Training Requests*** to view your team's training plans.



Step by Step: **Assign Learning**

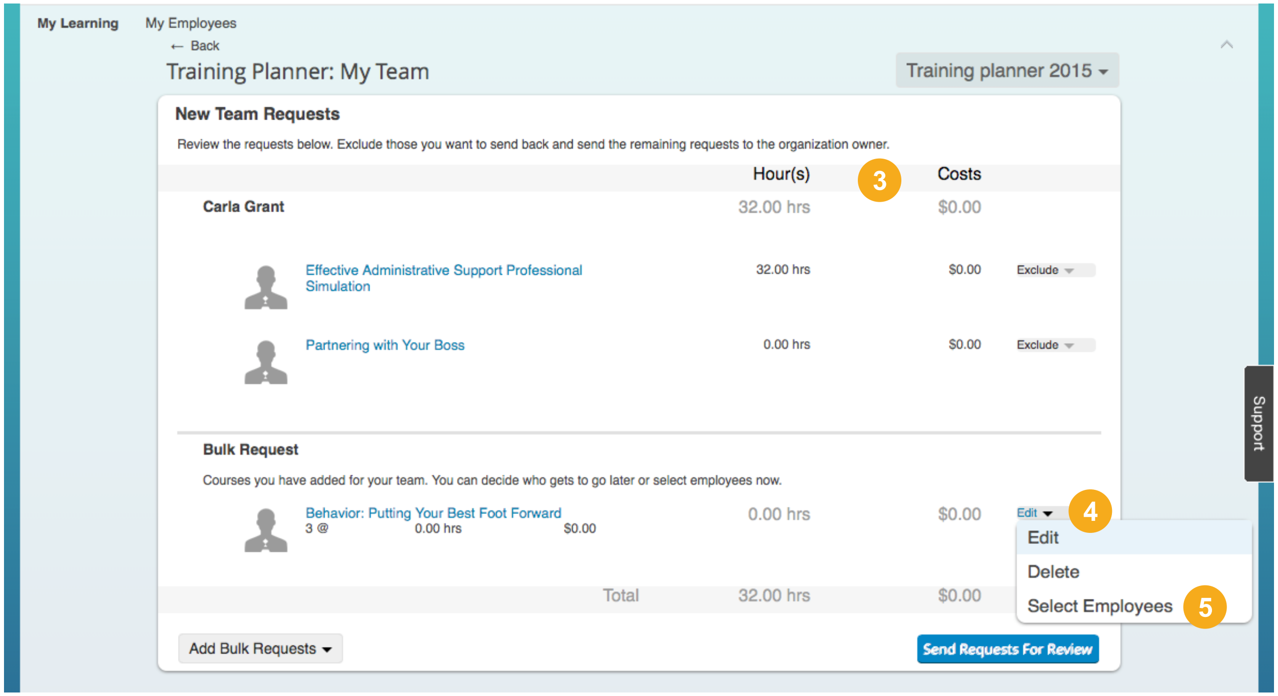
Managers may create and save training plans for their team and easily share training plans with other stakeholders.

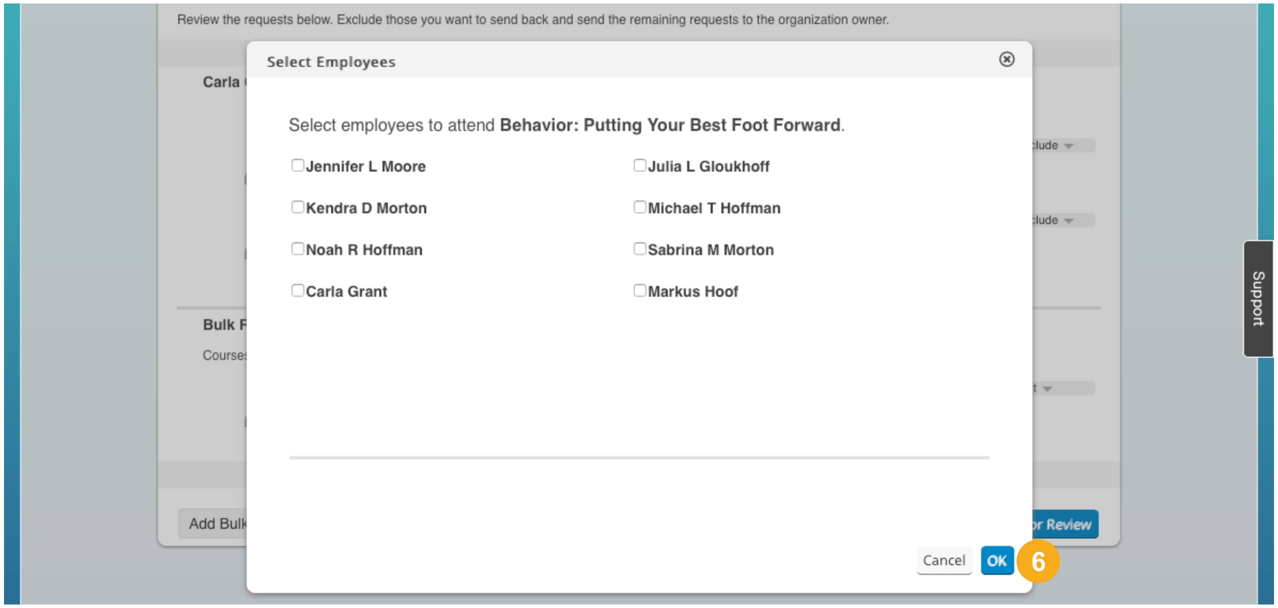
3 ***Course to be Assigned*** lists the budget and assignments for courses for the selected time period. If applicable, courses are listed with budget and cost restrictions.

4 Click ***Edit*** to make changes to the budget and schedule for an individual.

5 Click ***Select Employees*** to select the employees who need to attend the course. A pop up window will appear to select employees to assign the course to.

6 Use the checkboxes to select employees. Multiple selections are possible. When done, click ***OK***.





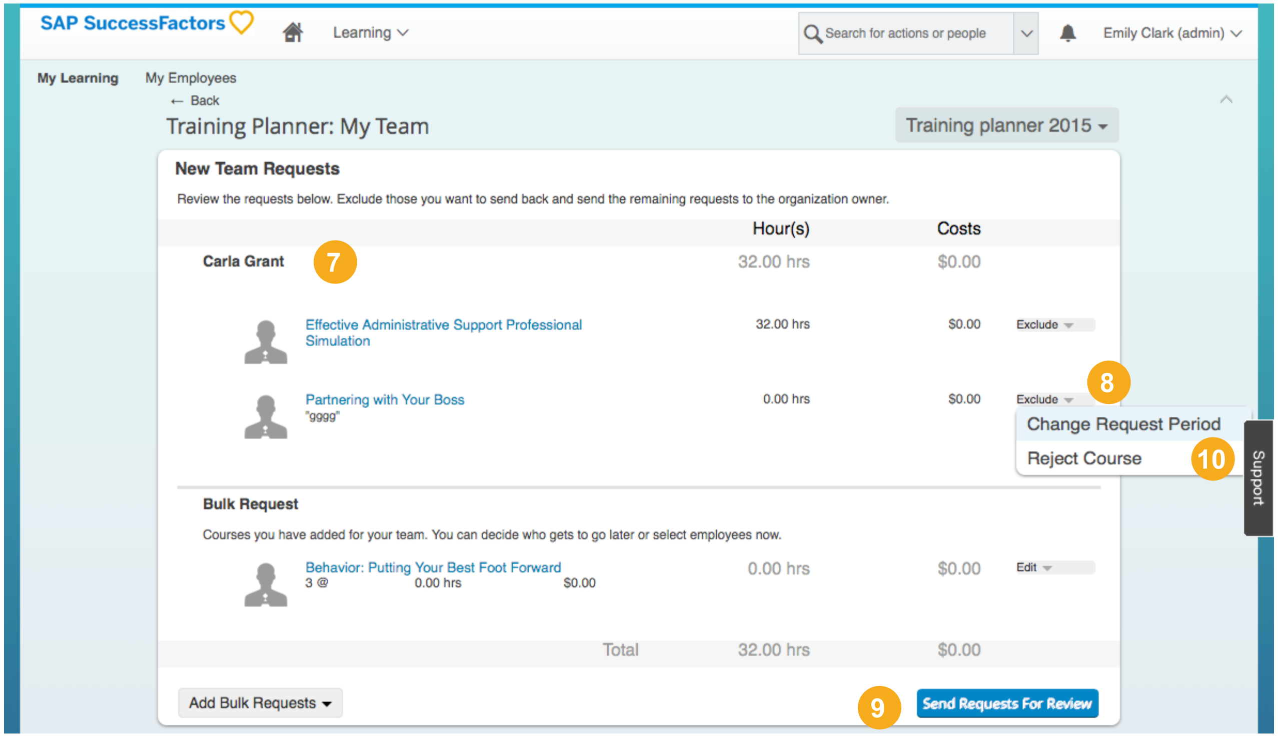
Step by Step: Team Training Request

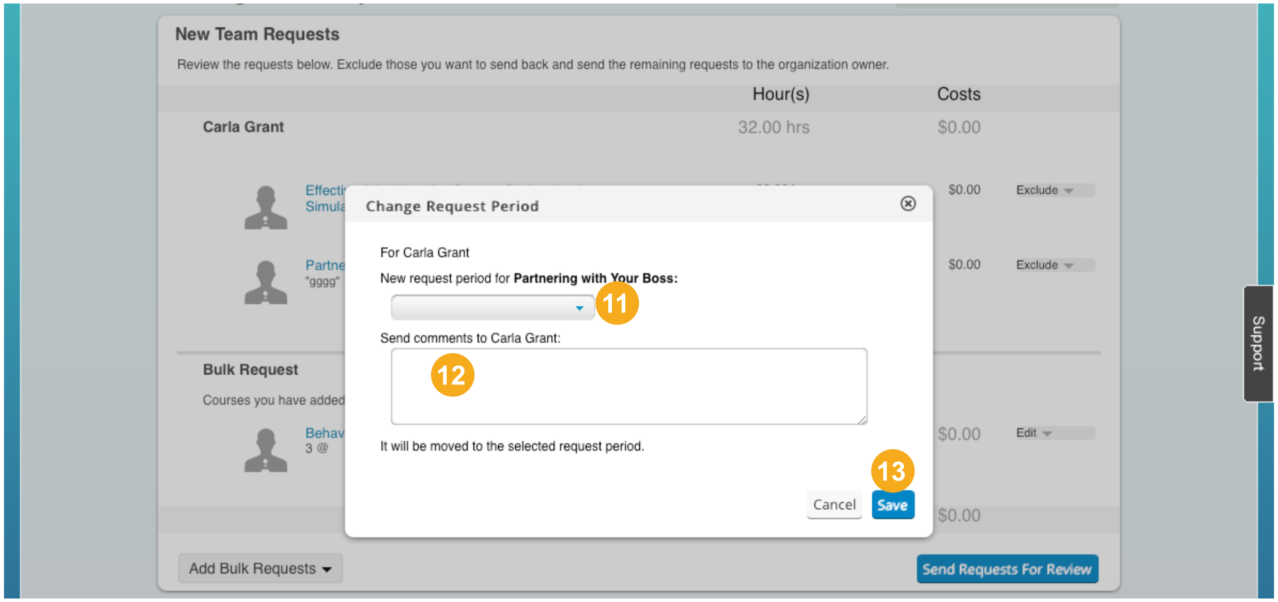
The Training Planner enables managers to get a better idea of the amount of training each organization needs. Use the ***New Team Requests*** section to review requests from your team and to add courses to assign.

7. Employee requests will display the employee's name, course, allotted hours, and associated costs.
8. Use the ***Exclude*** drop-down to ***Change Request Period*** or ***Reject Course***. **NOTE:** If rejected, a pop-up window appears and you may provide comments for the requester about why the course was rejected.
9. To approve the request, select ***Send Requests For Review*** to send the training plan to complete the approval process.

To change the request period:

10. Select ***Change Request Period*** from the selected course.
11. Use the drop-down menu to change the time period.
12. Add comments to the notification.
13. Click ***Save*** to save the new request period.





Learning Reporting

A priority for learning managers is to be able to run detailed reports. The overall goal of the Reports is to provide you with the knowledge needed to use the SuccessFactors Learning report interface to run, save, and create recurring report jobs.

SAP SuccessFactors

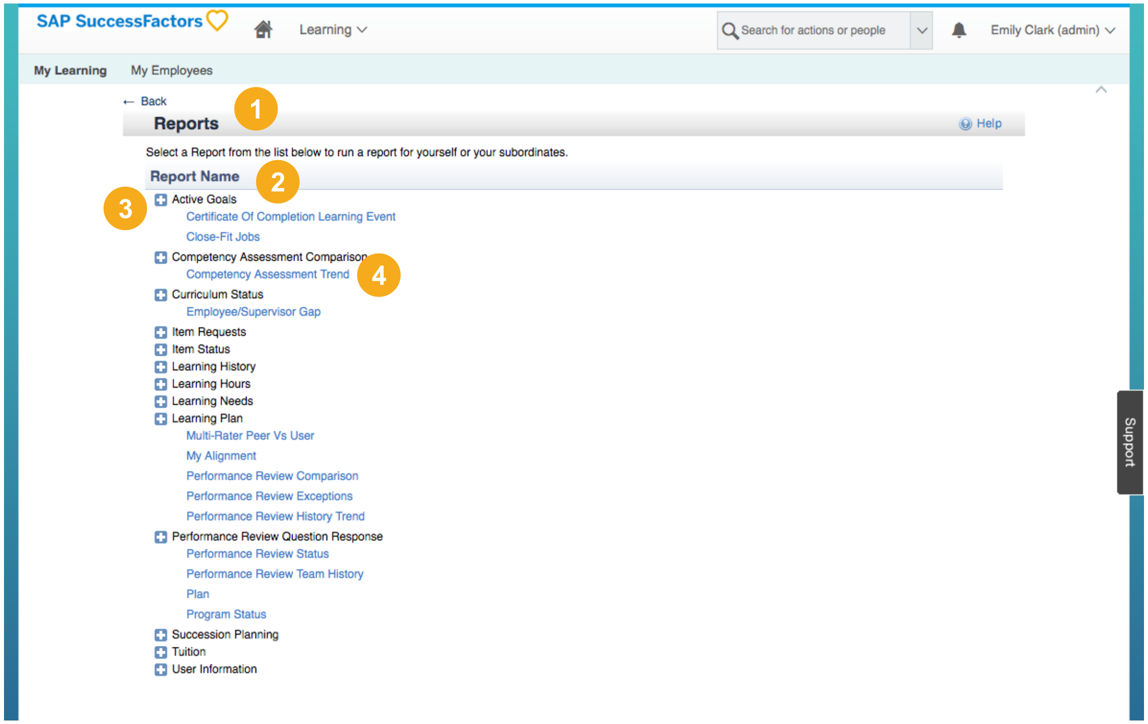
Step by Step: **Reporting**

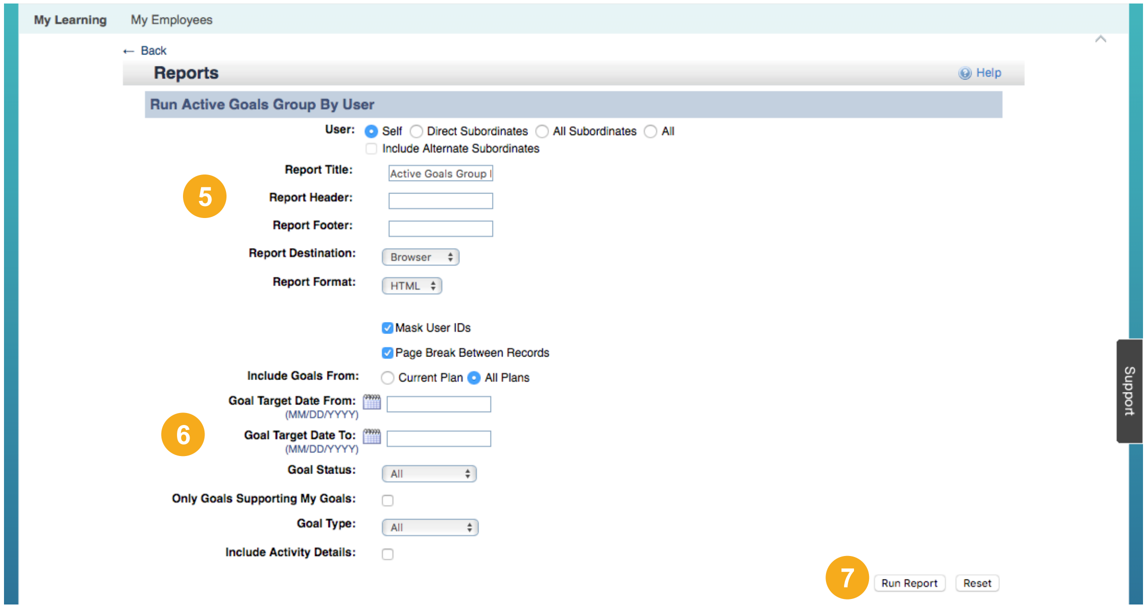
SAP SuccessFactors Learning can generate reports about your learning. Reporting is accessible via Links on the Home page. Reporting lists a variety of reports, by category, which can be used for compliance and audit history by the employee. Employee and managers may only access reports about the employee and learning records.

1. Click ***Reports*** from the ***Links*** section of your ***My Learning*** page.
2. View the list of available reports on the Reports screen.
3. Click the expand icon to see additional reports in each report group.
4. Click the report name to select a report and display the run reports screen.

Each report page has two sections:

5. The top section determines report layout.
6. The bottom section allows you to select.
7. Once the layout and criteria are defined, click ***Run Report***. A new window opens with the resulting information about the employee.





Common Tasks: Key Learning Reports

Report Name	Definition/Filter/Usage
Certificate of Completion Report	• The Certificate of Completion Report enables you to create a report of printable certificates of completion for Learners by learning Item. • Use the query screen to search for a Learner or Item requiring certificates. Use the Run Report for Completed learning events to filter the results for completed Items. • The Certificate of Completion report prints the certificates of completion for Learners by Item.
Curriculum Data Report	• Use the Curricula Data report to view information about Curricula and Subcurricula. • Use the filters to locate a specific Curricula. You may choose to include Subcurricula. • The Curriculum Data report returns Curricula attributes; including the Sub-curricula.
Curriculum Item Status Report	• The Curricula Item Status report provides information on the Curriculum assigned to each Learner, including their curriculum status. • Use the filters to select the Learner and Curriculum. • The Report includes Items assigned to each Curriculum, the completion date, completion status, and required date for each item.
Curriculum Status Report	• Curriculum Status reports display information related to the status of the Learners assigned Curriculum. • Use the filters to select the Learner and Curriculum. • This report returns the Curriculum assigned to each Learner and their Curriculum status, as well as the number of days remaining before the required training needs to be completed to keep the Curriculum current.
User Item Status Report	• User Item Status displays information about a Learner's completion status for Items during a specified time period. • Use the filters to select the Learner, Item, completion status, and date range to run the report against. • User Item Status report returns Learners' completion status for the Items they completed in a given date range.
Learning History Report	• The Learning History Report displays information about Items that Learners have completed. • Use the filters to select the Learner, and date range for which you would like the report to return results. • The Learning History report returns the Learning History (completed Items) for the Learner.

Report Name	Definition/Filter/Usage
Learning Needs Report	• The Learning Needs Report displays information about the Items that have been assigned to the Learner that need to be completed. • Use the filters to select the Learner, Item, and Required Date range for which you would like the report to return results. • The Learning Needs report returns the Items assigned to a Learner.
User Online Item Status Report	• The User Online Item Status report displays each Learner's progress for Online Items. • Use the filters to select the Learner, Item, and initial, last accessed, and completed date ranges to run the report against. • The User Online Item Status report returns a Learner's progress through online courses reported at the content object level.
Registration Status Report	• The Registration Status Report displays registration information for both Learners and Scheduled Offerings. • Use the filters to select the Scheduled Offering, Learner, and registration status to run the report against. • The Registration Status Report returns a detailed list of registration information including registration dates and times, enrollment numbers, Instructors, and Scheduled Offering details.
Scheduled Offerings Report	• The Scheduled Offerings report displays information about each Scheduled Offering. • Use the filters to select the Scheduled Offering and status to run the report against. • The Scheduled Offerings report returns detailed information about each Scheduled Offering including the Item scheduled, dates scheduled, registration and waitlist data, Instructor data and segment data.
Scheduled Offering Roster Report	• The Scheduled Offering Roster report displays information about the Learners registered in a Scheduled Offering. • Use the query screen to select the Scheduled Offering to run the report against. • The Scheduled Offering Roster report returns the roster of Learners in a scheduled offering.

Additional Resources

There are a number of additional resources that can provide more information about SAP SuccessFactors, including:

- SAP SuccessFactors website: http://www.successfactors.com
- Online system help
- Task-specific job aids
- SAP SuccessFactors monthly newsletter
- SAP SuccessFactors Customer Community: http://community.successfactors.com/

For information about courses and registration, contact: training@successfactors.com

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