Tutorial for Users of SuccessFactors Learning

Using SuccessFactors Learning version 6.4

Slide 1

Welcome to the tutorial for users of SuccessFactors Learning version 6.4.

Slide 2

To progress through this tutorial, use these buttons to go back or go forward at any time. Closed captioning is available by selecting the **CC** button at the bottom right corner of the interface. If you wish to change the view of this tutorial, you can do so by clicking the **Change View** button.

A Glossary of Terms is available in the upper right corner of the screen and provides detailed definitions of key terms used throughout the system. Attachments are also available in this area to provide you with additional materials to help you use the system.

From time to time, you also encounter a number of learning elements that engage you in the learning process. These interactive segments help to illustrate system processes, define system-specific terminology, and provide descriptions of various entities in the system. Click the **Previous** and **Next** arrows to navigate within these segments. You can also click the **Next Slide** button to skip the segment and proceed to the next slide.

To exit the tutorial at any time, simply close the course window.

Slide 3

This tutorial introduces you to the basics of the SuccessFactors Learning Management System, or LMS. You will learn how to navigate within the system, view and modify your Talent Profile, browse and search the catalog, assign items to your To-Do List from the catalog, register for scheduled offerings, launch online content, and view your Completed Work.

Let's get started.

Slide 4

Let's take a look at how to navigate within the system. In this section, we will talk about the various parts of the system including the News page, the top menu bar, and the parts of the Home page such as the User Card, To-Do List, and Easy Links and buttons.

Slide 5

When you first log on to the system, a News page is displayed that provides you with information that can be updated on a regular basis. You can select the **Do not show this page every time I sign in** checkbox to have the system only show the News page when it has new or modified content. If you select this checkbox, then you can use the News option under the Easy Links to review the content of the news page or change the setting.

If you selected the **Do not show this page every time I sign in** option on the News Page when you launch SuccessFactors Learning, your Home page displays. Let's take a closer look at the Home page.

Slide 6

The Home Page contains several distinct sections. On the Home page, you receive a welcome to the LMS. This welcome is always displayed while you are logged in.

Clicking the **Check System** button will complete a systems check to determine if you have the correct versions of software installed and enabled.

Clicking this **Sign Out** link logs you out of SuccessFactors Learning.

The top menu bar is divided into the system's functional areas. You can roll your mouse over or click each menu option to view the submenu, which is displayed below. Remember, your menus may have different options.

Click this **Home** link from any screen in the LMS to return to your Home page.

Context sensitive help is available on every screen. Clicking this **Help** button displays the help information specific to the page you are currently viewing.

Let's take a look at your To-Do List.

Slide 7

The Home Page displays four distinct sections: the User Card, To-Do List, Catalog Search Options, and Easy Links and Buttons.

The User Card shows your name, job title, organization, and any alerts that you might need to address. Click your name to access your talent profile. Alerts tell you if you have actions pending. This section provides links that, when clicked, take you directly to the correct screen to take the action.

The To-Do List represents the tasks that you need to complete grouped by the due date, and allows you to find and access the materials that you need. When you first access the home page, the To-Do List displays in the list view, which means that you must hover on each entity to get the possible methods of action.

The catalog can contain: items, curricula, and scheduled offerings. By selecting the **Catalog** link on the Home Page, the LMS returns the four ways that users can search: Simple Catalog Search, Advanced Catalog Search, Browse Catalog by Subject Area, and Calendar of Offerings.

The Easy Links are another way that you can access some of the most commonly used processes or places. Typically, you can use the links to access processes and buttons to access places.

Slide 8

By default, the To-Do List shows a consolidated list of the things that you need to act on.

Items that are assigned to you as well as course evaluations and scheduled offerings you are enrolled in are displayed on your To-Do List.

The To-Do List provides the title and description of the item, date each item was assigned, the date that it's due, and all of the other important details you need to complete the assignment.

Next, let's take a closer look at navigating the To-Do List.

Slide 9

The To-Do List provides you with a consolidated list of the things that you need to act on.

When you have many entities in your To-Do list, it can be challenging just to find the one that you need. However, you can configure your To-Do List so that it shows what you need the most. For example, you can filter the To-Do List so that it shows you only a list of items. You can decide which type of entity you would like to display on the To-Do List at a single time. You can choose from: Everything, All Learning, Registrations, Online Courses, and Course Evaluations.

There are two ways to view the To-Do List: List View, which is the default setting, and Card View, which displays much more information about the entity. The advantage of the List View, which is the system default, is that you can view more things simultaneously. To get more information about an entity and access all the functions in List View, just hover your mouse over the record.

The advantage of the Card View is that you can see the details of each record, and you can access all the functions for that entity. The disadvantage of the Card View is that you cannot view as many things at one time.

Slide 10

The To-Do List displays items currently assigned to you. Let's explore the item details on the To-Do List. To see more details about the item in List View, simply hover your mouse over the title.

In addition to the item title, the To-Do List also identifies the item classification. The person icon indicates an instructor-led course; a computer icon indicates an online item; and both icons together indicate a blended learning item. There can also be a document icon, which indicates the item to be completed is outside of SuccessFactors Learning, such as reading a document or a manual.

The Due by date displays the date by which you must complete the item before you will be considered overdue.

Status indicates whether the item is currently available or whether it requires you to complete an action (such as registering for the item).

The Action area lists one or more action buttons that provide you with options to help you complete the item.

Additional details about an item are available by clicking **View Details.**

Slide 11

Clicking the item title in the To-Do List or clicking the **View Details** button displays the Item Details page. This page lists the item summary and other details, such as assignment information, related subject areas, possible prerequisites and substitutes for the item, competencies, and related documents.

From the Item Details page, you can:

- View additional information about the item
- Request a scheduled offering be created (if available)
- View and self-assign substitute items
- View and open documents that are associated with the item

Slide 12

Easy Links allow you to access commonly used processes like Approvals for approving training, or running reports. Simply click a link to be taken to the related process.

The buttons allow you to visit places like your Curriculum Status page or Completed Work. Clicking a button will take you directly to the related place.

Please note that your easy links and buttons may look a little different based on your organization's LMS configuration.

Slide 13

Next, we are going to look at your Talent Profile starting with an overview and then how to view and modify your Talent Profile.

Slide 14

Talent profiles provide a single comprehensive view of each user's experience, background, competencies, and a variety of other information. Some fields are controlled by the LMS administrator to ensure data security while others can be updated by users. Talent profiles can be made to expire alerting users to update their data often.

Next, let's take a look at how to view and modify your Talent Profile.

Slide 15

If your Talent Profile needs immediate action, an alert displays on your Home Page indicating that your profile needs to be updated.

Clicking the alert link or your name in the user card takes you to your Talent Profile.

Only three of the many fields available within Talent Profiles are currently being displayed. Take note of the sections that are currently incomplete. Next we will take a closer look at updating the Professional Licenses/Certifications field in the Talent Profile. To edit a field, click the corresponding **Edit** icon.

Once in edit mode of the Professional Licenses/Certifications section, notice the required fields. After you enter all the required information, click the **Save** button. This saves the entry, updates the field, and removes the incomplete status for the section of the Talent Profile. After completing all required information, the section will no longer be displayed as incomplete.

Back on the Talent Profile page, notice the Professional Licenses/Certifications section has been updated. Make sure to update all required fields within your Talent Profile. Some sections of your Talent Profile will be able to be expanded to display all of the fields that exist within that section.

Slide 16

The catalog is the place to search for training that has not been assigned to you. Courses can be found in several places from the Catalog menu including browse the catalog, simple and advanced catalog searches, and the calendar of offerings.

Let's take a look at how each of these methods can help to find courses that are available to you through the catalog. First, let's take a look at browsing the catalog.

Slide 17

In the Browse Catalog view, each subject area is listed on the left side of the page. Each subject area displays the number of items that are associated to that subject area.

To see the items in that subject area, click the subject area title. For example, to see the items in the Change Management subject area, click the **Change Management** link. The items are listed on the right.

Slide18

Once you list all the items, you can browse the list in the Items section and take a number of actions:

Click the **Request Schedule** button to send a request to the admin for more information about the item.

Click the **Add to To-Do List** button to add the item to your To-Do List.

If you want to see additional information about the item, click the **More** link.

If there is a scheduled offering for the item, you can click the **Register** button to register for the scheduled offering.

Slide 19

Other than browsing the catalog, SuccessFactors Learning also provides three other ways to search the catalog:

- Simple Catalog Search
- Advanced Catalog Search
- Calendar of Offerings

Slide 20

You can perform a simple catalog search from either the search box above the Easy Links section on your Home page or by clicking the **Catalog** link. Enter a keyword in the search box and click the **Search** icon or **Go** button to perform the search.

You can also further customize your search results by selecting the options below the search box on the Simple Catalog Search page.

Slide 21

The Advanced Catalog Search page searches for specific scheduled offerings, items, and curricula. It differs from the simple search page because it contains all search criteria provided by the system, such as item ID, subject area, delivery method, and source. You can also filter the search to only return items, curricula, or scheduled offerings.

Slide 22

On the Calendar of Offerings page, you can see scheduled offerings in a calendar view. All scheduled offerings display in the calendar by subject area. Use the functions at the top to change your calendar views.

Slide 23

The Search Results page lists the items in SuccessFactors Learning that match your search criteria. For each item listed, you are also given the item type, price, status, and action. The Status column indicates important details, such as whether or not the item is already on your To-Do List or if there are any prerequisites that you have not fulfilled.

Slide 24

Many times, items are automatically assigned to you by the system, your LMS administrator, or your supervisor; however, you can assign items to your To-Do List yourself. Now that we have seen how to search for items in the catalog, let's take a look at assigning them to your To-Do List.

Slide 25

Simply search the catalog and click **Add to To-Do List** from the search results page.

Slide 26

Next, let's take a look at scheduled offerings; starting with an overview then the different registration options such as from the To-Do List, from the catalog, and from the calendar of offerings.

Slide 27

Scheduled offerings are items that have been scheduled for delivery to users. Scheduled offerings are typically divided into segments with resources assigned to each segment. You can register for scheduled offerings of items from your To-Do List, from the catalog, and from the calendar of offerings.

No matter how you decide to self-register, you will receive an email notification from SuccessFactors Learning that displays your registration status and details about the scheduled offering.

Slide 28

There are a number of ways you can register for a scheduled offering in SuccessFactors Learning. The first way is to register from your To-Do List.

Click the item title and then the **View Offerings** button to see the available scheduled offerings.

Click the **View Details** button to see additional information about the scheduled offering.

The scheduled offering details are displayed. Information includes the scheduled offering ID, item description, and segment details.

Click **Register** to register for the scheduled offering.

The Registration page is displayed. This page allows you to review the scheduled offering information, including the item title and ID, and the start and end date. You can also add comments, if appropriate.

Review this information and click **Confirm**. You are now registered for this scheduled offering.

Slide 29

The second way to register for scheduled offerings is from the catalog.

You can enter a topic that might be included in the title of your course in the **Title** field. You can then modify the search options to only show the type of entity that you are looking for such as **Only Offerings**. There are also additional configuration options available such as subject areas, date ranges, and many other options. Once your details are specified, click **Search**.

Your search results are listed. From here, you can add the item to your To-Do List and register from there. In this case, we will register directly from the search results. Click the **expand arrow** to see the scheduled offering details.

Click the **Register** button.

The Registration page is displayed. This page allows you to review the scheduled offering information, including the item title and ID, and the start and end date. You can also add comments, if appropriate.

Review this information and click **Confirm**. You are now registered for this scheduled offering.

Slide 30

The third way to register for scheduled offerings is from the Calendar of Offerings.

In the Calendar of Offerings, courses are listed by subject area. Select a related subject area for the scheduled offering you are looking for on the calendar.

A list of available scheduled offerings is provided. Click the **Register** button next to the offering you would like to enroll in.

If the selected offering is correct, enter comments if needed and click the **Confirm** button.

You are now registered in the scheduled offering.

Slide 31

Next, we will take a look at launching online content starting with an overview.

Slide 32

Some items in SuccessFactors Learning are entirely online. You can complete them at your own pace, at any time. A content object is content you can launch using your browser or other application on your workstation.

Items can contain multiple content objects. Some examples of online content are: online courses, web sites, executable files, Microsoft Word documents, Adobe Acrobat documents, and Microsoft PowerPoint presentations.

Slide 33

Items that are completely self-paced and contain only online content are indicated on the To-Do List with a computer icon in the Type column.

If in List View, hover over the item record and then click **Go to Content**. If your online content contains only one piece of content, the item launches immediately.

If the online content contains multiple content objects, the Online Content Structure page displays.

The Online Content Structure displays each content object. Completed content objects are indicated with a green checkmark and a completion date and time.

Slide 34

Your To-Do List can be full of assigned items among other things that you need to act on. But where does it go when you've completed each item? When you complete an item, a learning event is recorded and stored in your Completed Work. Sometimes an administrator records the learning events, and other times, the system can record them automatically.

Next, let's take a look at how to view items that you have already completed.

Slide 35

Completed Work is located in the Easy buttons section of your home page. After clicking the button, you will be directed to your Completed Work table.

The Completed Work table displays a list of items and historical activities and tasks that you have completed in the user interface.

You can adjust the column width and sorting options of the completed work table. You can drag the column divider to set the width on each column. To sort alphabetically from A to Z, click the column header; to sort alphabetically from Z to A, click the column header a second time.

The Completed Work shows the titles, completion dates, completion statuses, and actions. You can also search by using the Title box and sort by status with the status drop down box.

To see more details about the learning event, click the item title.

For all of the items successfully completed, you can hover over the item record and click **Print Certificate** to print a certificate of completion.

Slide 36

Completed online content is recorded as learning events and stored in your Completed Work table. If enabled, you can return to content objects to review its information directly from your Completed Work. Hover over the item record and then click **Review Content** to access the content object.

Slide 37

There is no audio for this slide.

Slide 38

You have now completed the tutorial for users of SuccessFactors Learning version 6.4. You should now be able to:

- Navigate within SuccessFactors Learning
- View and modify your Talent Profile
- Browse and search the catalog
- Assign items to your To-Do List
- Register for scheduled offerings
- Launch online content
- View your Completed Work

Slide 39

Please select a topic you would like to learn more about.

Slide 40

You may now close the window.