BUSINESS EXECUTION SOFTWARE

SUCCESSFACTORS LEARNING

USER OVERVIEW REFERENCE GUIDE

SuccessFactors, Inc.
4401 Wilson Boulevard, Suite 400
Arlington, VA 22203
Tel: (703) 678-0000
www.successfactors.com

Confidential and Proprietary

For SuccessFactors Learning v 6.4

Last Modified 11/01/2011

Execution is the Difference.

Printed in the USA

TABLE OF CONTENTS

INTRODUCTION

The purpose of this user's reference guide is to provide you with the basics of the SuccessFactors Learning Management System (LMS), including how to navigate within the system, access your To-Do List, browse and search the catalog for items, assign items to your To-Do List, register for available scheduled offerings, launch online content, view your Completed Work, and run reports.

Support Services

There are a number of resources that may provide additional information and support about the SuccessFactors LMS:

- SuccessFactors, Inc. website:

  http://www.successfactors.com

- Online LMS help
- Task-specific job aids

For more information about other courses and registration, contact SuccessFactors Academy at training@successfactors.com.

USER ACCESS AND OVERVIEW

To log in to SuccessFactors Learning:

1. Enter the web address (URL) of the user application into your browser Address field.
2. Click **Go** to access the login screen.

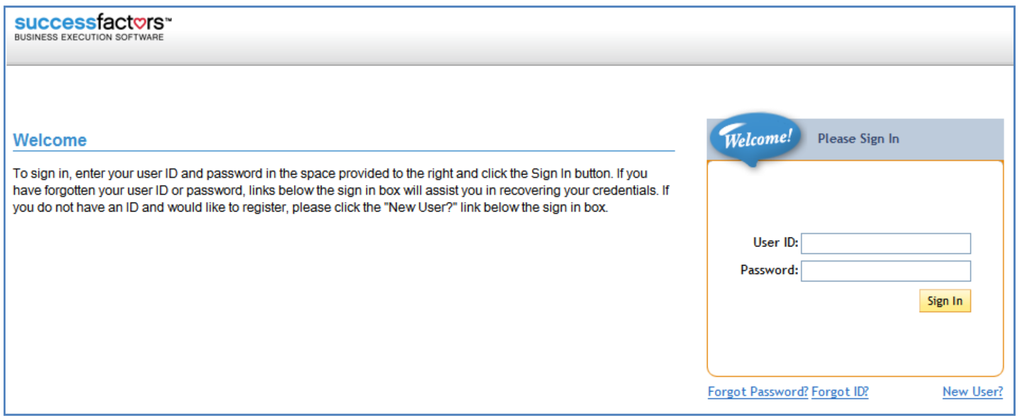


Figure 1. SuccessFactors LMS Login Screen

3. Enter your user ID in the User ID textbox.
4. Enter the password provided by your administrator in the Password textbox.
5. Click **Sign In** to proceed to your Home page.

SuccessFactors Learning prompts you to change your password after initial login.

Forgotten Password

To retrieve your password:

1. Go to the SuccessFactors LMS user login screen.

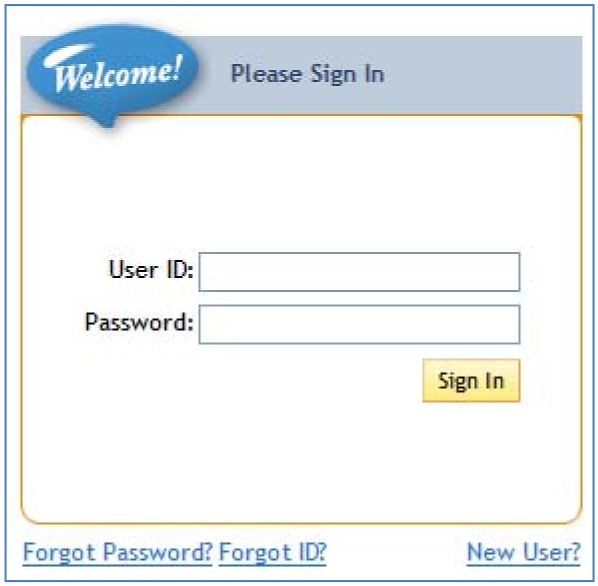


Figure 2. User ID and Password

2. Click the **Forgot Password?** link to have you password emailed to you.

3. Enter your user ID in the User ID textbox.

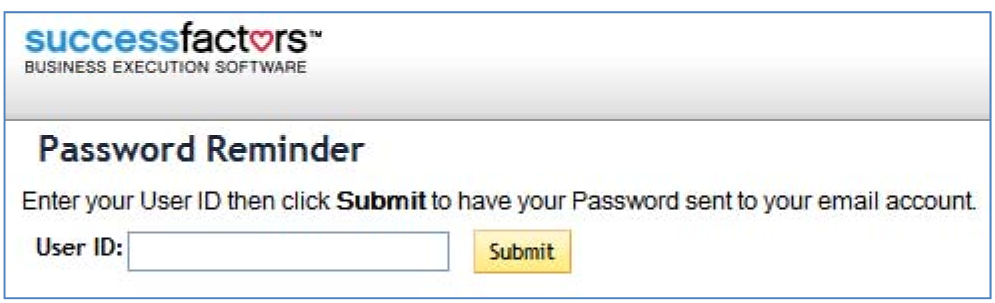


Figure 3. Password Reminder

4. Click **Submit**.

If you are unable to receive email from SuccessFactors Learning, contact your supervisor or LMS administrator to reset your password.

Locked User Account

If you exceed the maximum login tries, SuccessFactors Learning displays a warning message. Contact your supervisor or LMS administrator to unlock your user account.

Forgotten User ID

To retrieve your forgotten user ID:

1. Go to the SuccessFactors LMS user login screen.
2. Click the **Forgot ID?** link.
3. Enter your email address.

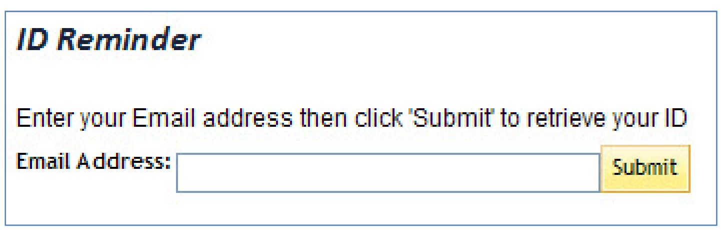


Figure 4. ID Reminder

4. Click **Submit**. Your user ID is automatically populated in the User ID textbox on the login screen.

Updating Personal Information

Click the **Options and Settings** link in the Easy Links section of the Home screen to update your personal information.

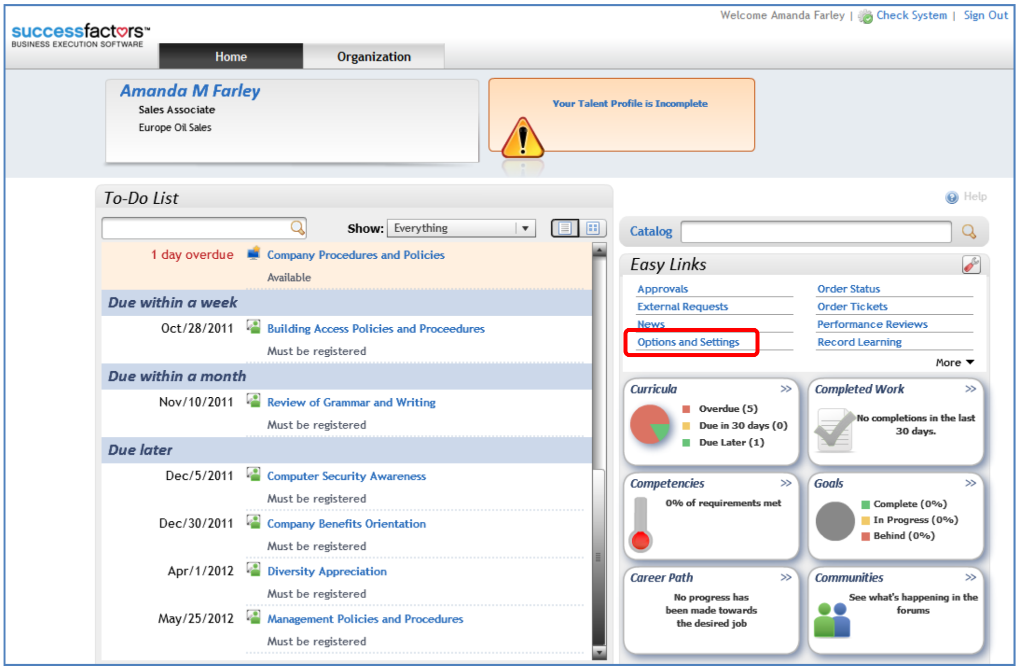


Figure 5. Easy Links > Options and Settings

The Options and Settings screen displays.

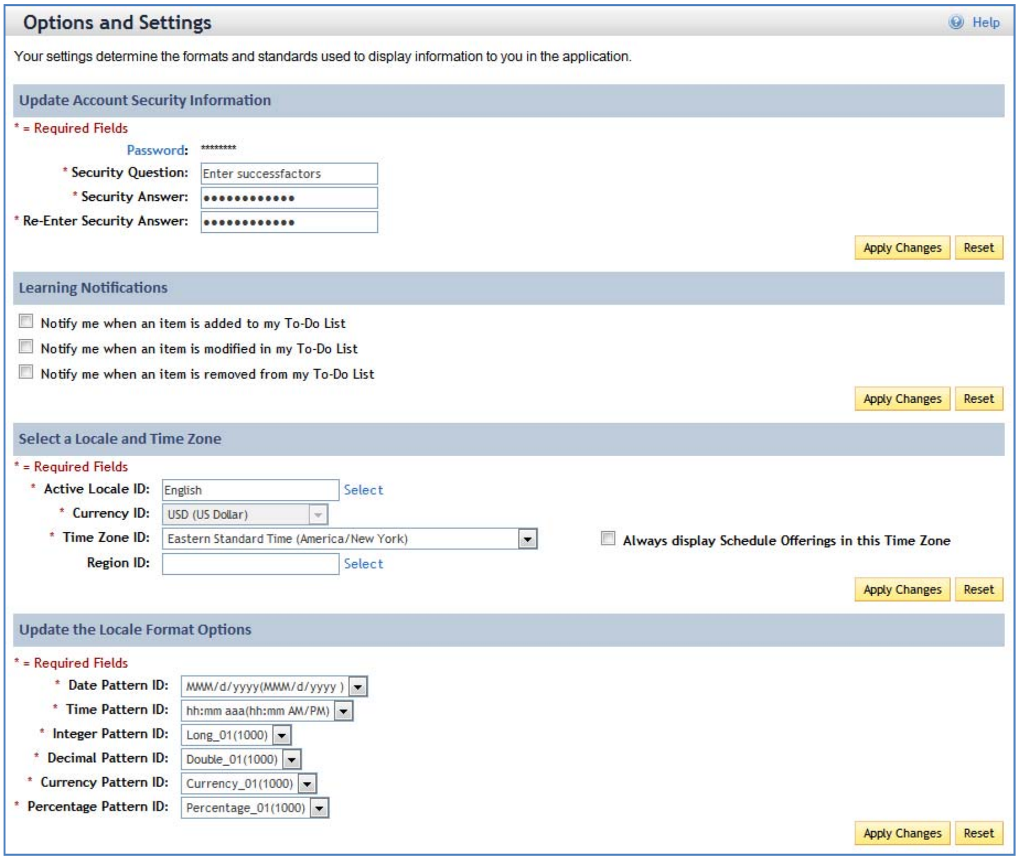


Figure 6. Options and Settings Screen

The Options and Settings screen has four sections:

- Update Account Security Information
- Learning Notification
- Select a Locale and Time Zone
- Update the Locale Format Options

Depending on the global settings made by the system administrator, some fields may be editable. If a value is contained in a textbox or a drop-down menu, then you can update it.

Reset Your Password

To reset your password:

1. Click **Options and Settings** in the Easy Links section on the Home page.

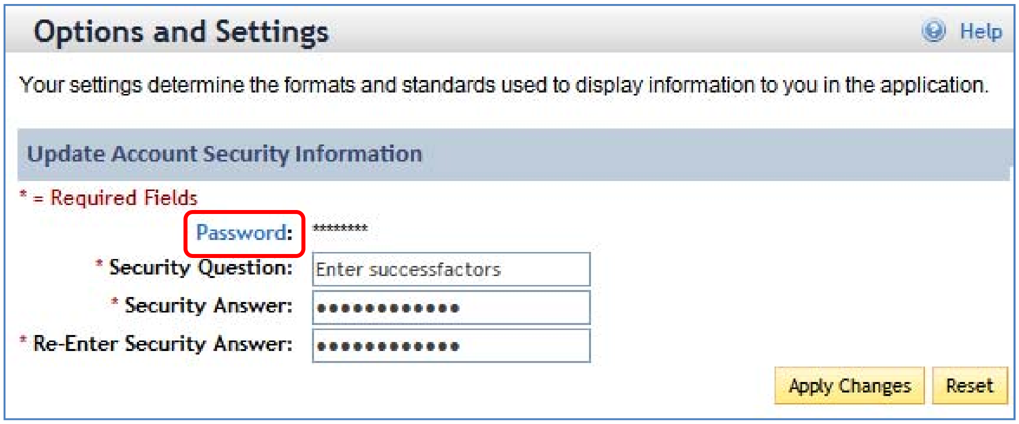


Figure 7. Options and Settings > Update Account Security Information Section

2. Click the **Password** link to display the reset password options.

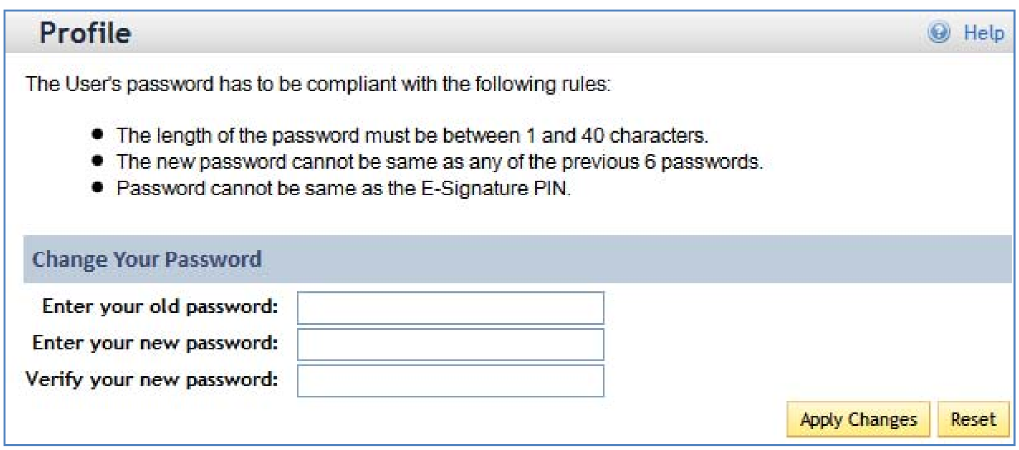


Figure 8. Profile Screen > Change Your Password

3. Enter your current password in the **Enter your old password** textbox.
4. Enter your new password in the **Enter your new password** textbox.
5. Enter your new password again in the **Verify your new password** textbox.

6. Click **Apply Changes** to save your new password.

SuccessFactors Learning prompts you to change your password after initial login.

Reset Your Security Question and Answer

To reset your security question and answer:

1. Click **Options and Settings** in the Easy Links section on the Home page.

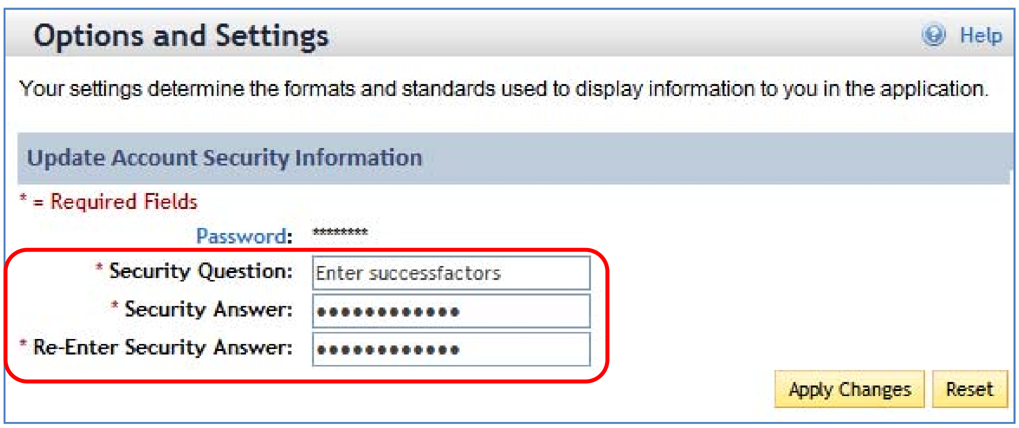


Figure 9. Options and Settings > Update Account Security Information Section

2. Enter a new security question in the **Security Question** textbox.
3. Enter the answer to the new security question in the **Security Answer** and **Re-Enter Security Answer** textboxes.
4. Click **Apply Changes** to save your new security question and answer.

Learning Notifications

If your administrator allows users to modify these settings, then you can select any checkbox to receive an email when that event occurs.

Figure 10. Learning Notification Options

Select Locale and Time Zone

You can select your preferences for language (Active Locale ID), time zone, and region that the user interface uses. When you select a currency ID, it affects how items are displayed when you are browsing a catalog. When you change the time zone ID, the user interface displays all dates and times using that time zone, except for scheduled offerings, which are displayed in their own time zones by default. You can override that default and display the scheduled offerings in your preferred time zone by checking the **Always display Schedule Offerings in this Time Zone** checkbox.

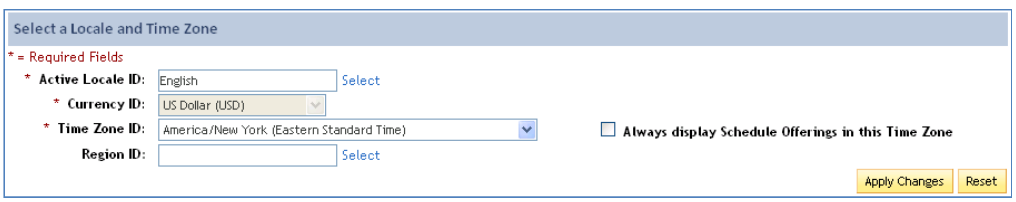


Figure 11. Select a Locale and Time Zone Options

You can select a region ID to narrow the advanced catalog search for scheduled offerings. For example, if you go to **Catalog > Advanced Catalog Search** and select **Only Offerings** in the Search Options section, then the **Show Only Offerings in my Region** checkbox is selected by default, which means that the search results are limited to the region you select in Options and Settings.

Update the Locale Format Options

In the Update the Locale Format Options section, you can select one of the pattern IDs that an admin created. Each pattern ID sets the display and hint format that is used throughout the user interface, including reports.

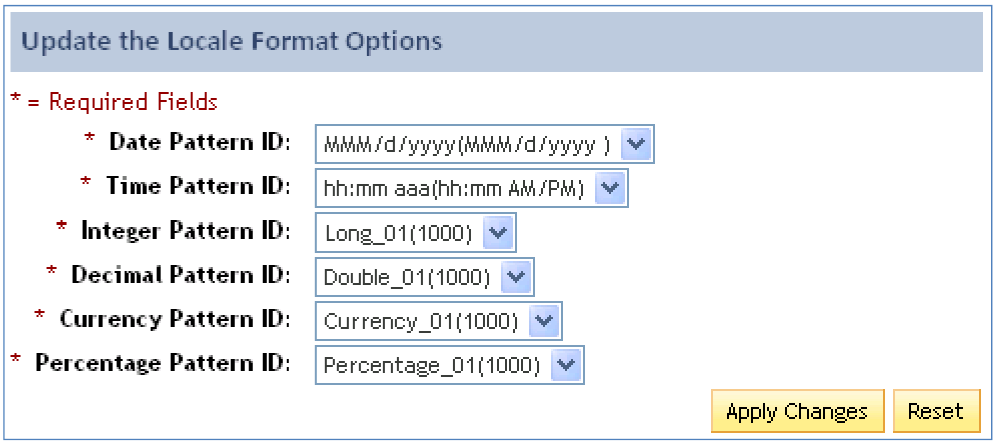


Figure 12. Update the Locale Format Options

Self-Create New User Account

New users to SuccessFactors Learning may be able to create their own user accounts. The Create New Account screen contains account creation settings that were previously located under User Settings.

On the LMS user login screen, click the **New User?** link.

Figure 13. User Login Screen > New User? Link

Enter account and contact information on the Create New Account screen, and click **Submit** when finished.

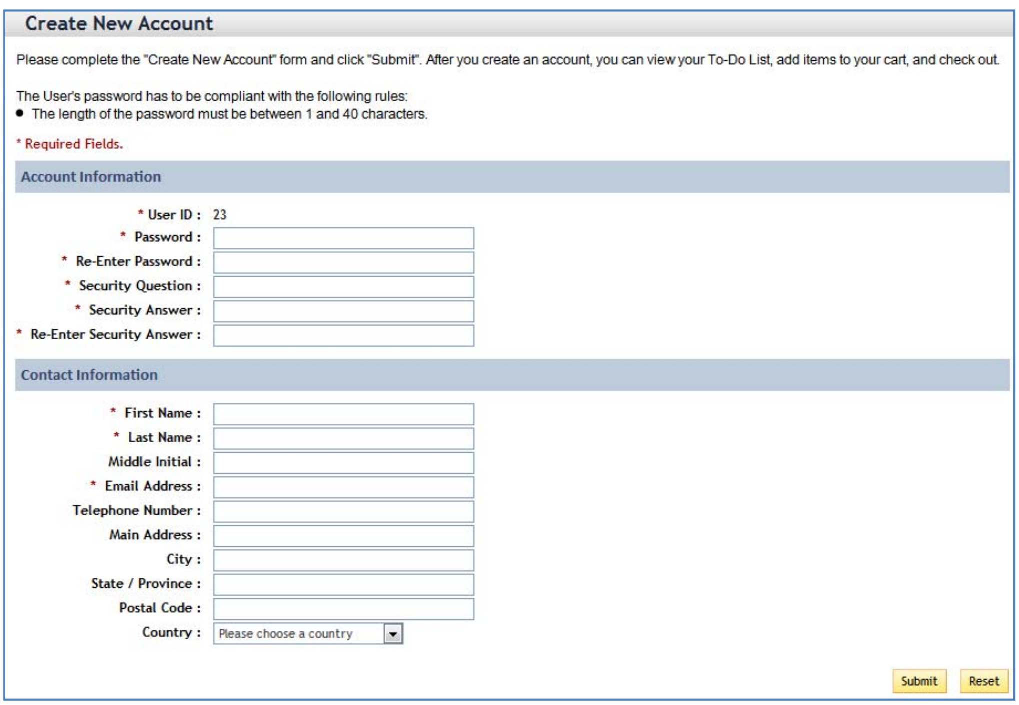


Figure 14. Create New Account Screen

NAVIGATION

The first time you log in to SuccessFactors Learning, a getting started screen displays.

Figure 15. Getting Started Screen

This screen is divided into two sections:

- The top part summarizes what you can do from the different sections of your Home page.
- The bottom part displays all the featured items in SuccessFactors Learning (i.e., new and revised learning items).

Check the **Do not show this page every time I sign in** checkbox and click **Continue**. If there are no new featured items, the getting started screen will not display the next time you log in.

Home Page

The Home page is divided into several sections that enable you to easily access your most commonly used functions in the LMS.

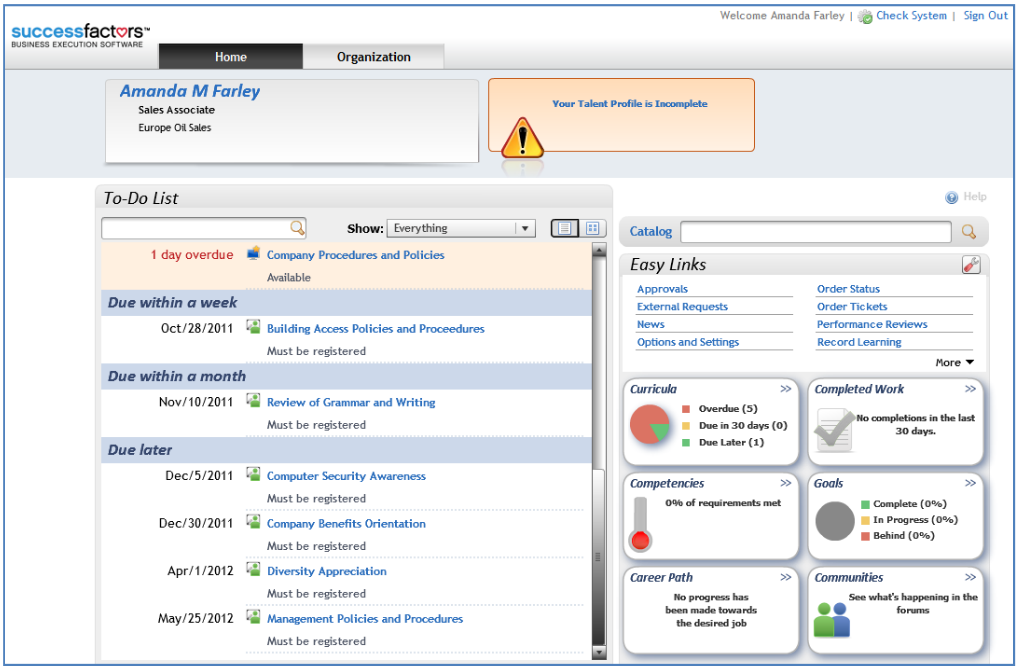


Figure 16. Home Page

Top Menu Frame

The top menu frame provides links to some system options (search, system check) and tabs to access other functional areas in the LMS (Home, My Employees, Organization, Admin).

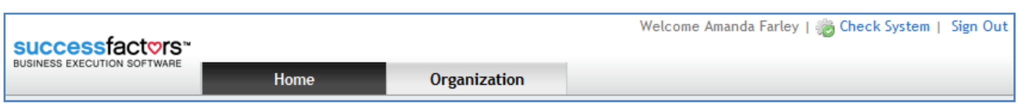


Figure 17. Top Menu Frame

Some tabs and menus may not display depending on your SuccessFactors Learning licenses and your assigned role(s).

You can access the following:

- **Check System:** Click to check your system for the necessary software to run SuccessFactors Learning.
- **Sign Out:** Click to end your current session.

Use the tabs to navigate within SuccessFactors Learning:

- **Home:** Click to access your Home page.
- **My Employees:** If you are identified as a supervisor in the LMS, click this tab to access the tools to manage your employees.
- **Organization:** If you are identified as an organization owner in the LMS, click this tab to access the tools to manage tasks (such as succession planning and initiatives) or explore data (such as goal progress or initiative alignment) for an organization.

  See the **Supervisor Overview** *and* **Organization Owner Overview** *reference guides for more information on these roles in the LMS.*

- **Admin:** If your user account is linked to an administrator role (i.e., you also need access to the administrator side of SuccessFactors Learning), this tab is displayed. Click the tab to toggle to your administrator account (interface).

User Card

The user card displays a summary of the user whose desktop you are viewing and any alerts the user might currently have.

Figure 18. User Card and Alerts

The summary information displayed on the user card includes:

- User's name
- Job title
- Organization

Alerts are displayed to the right of the summary information, and indicate any actions you need to take.

The Delegators list contains all of the users who have identified you as a delegate. This icon will only display next to your user card if you've been identified as a delegate.

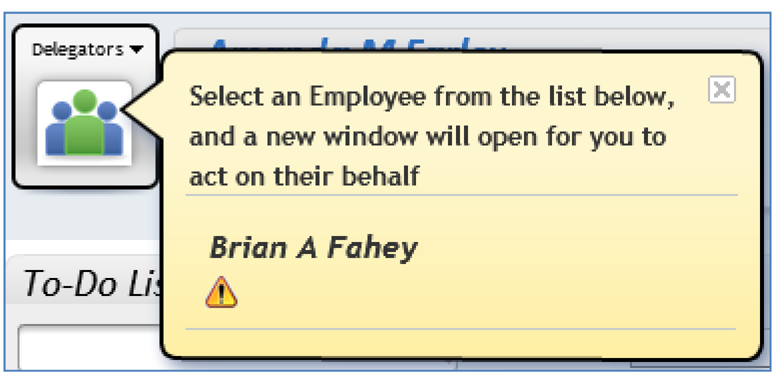


Figure 19. Delegators List

To-Do List

The To-Do List displays a list of the things you must act on, grouped by the due date of the list item.

Figure 20. To-Do List

Use the type-ahead filter to search your To-Do list for specific words or phrases. When the filter is invoked, any non-matching entry is no longer displayed. The filter searches the title only for each type of entry.

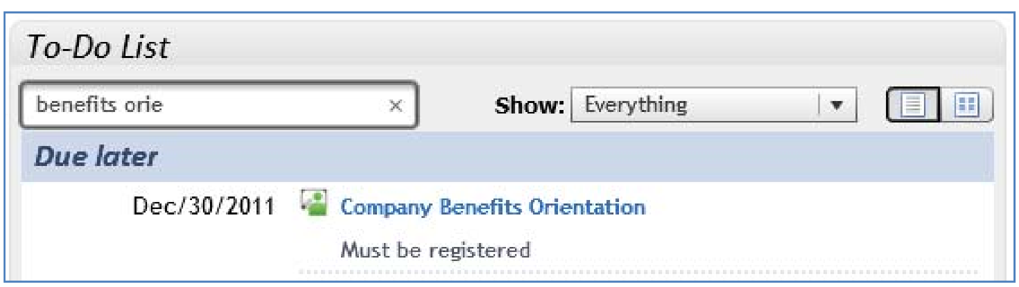


Figure 21. User To-Do List Filter

Use the **Show** drop-down menu to filter the items listed on your To-Do List.

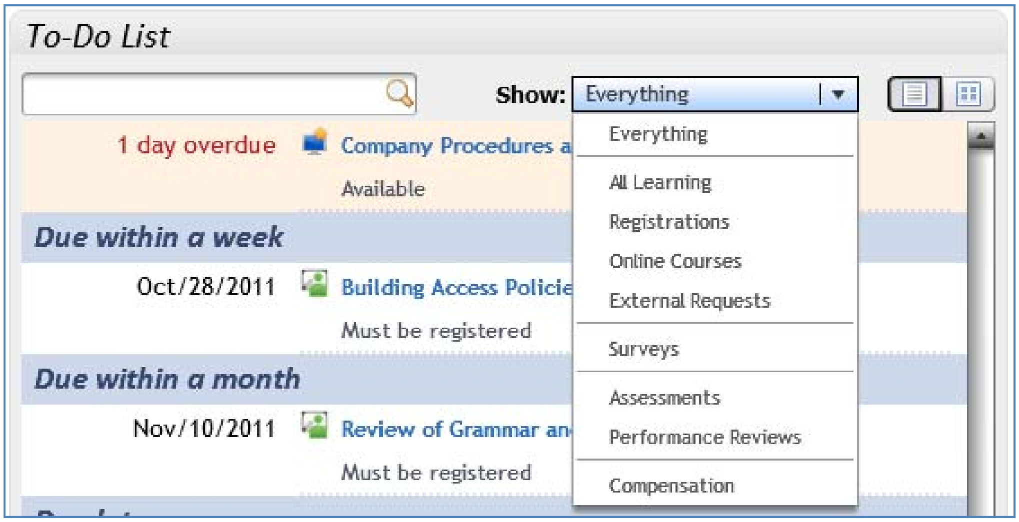


Figure 22. Filter Options for To-Do List

Filtering data prevents rows from displaying. This is useful if the To-Do List contains a large amount of data and you are interested in only specific information.

You can also change the view of the items listed on the list. Click the **Switch to Card View** icon ( ) to view the listed items in card view.

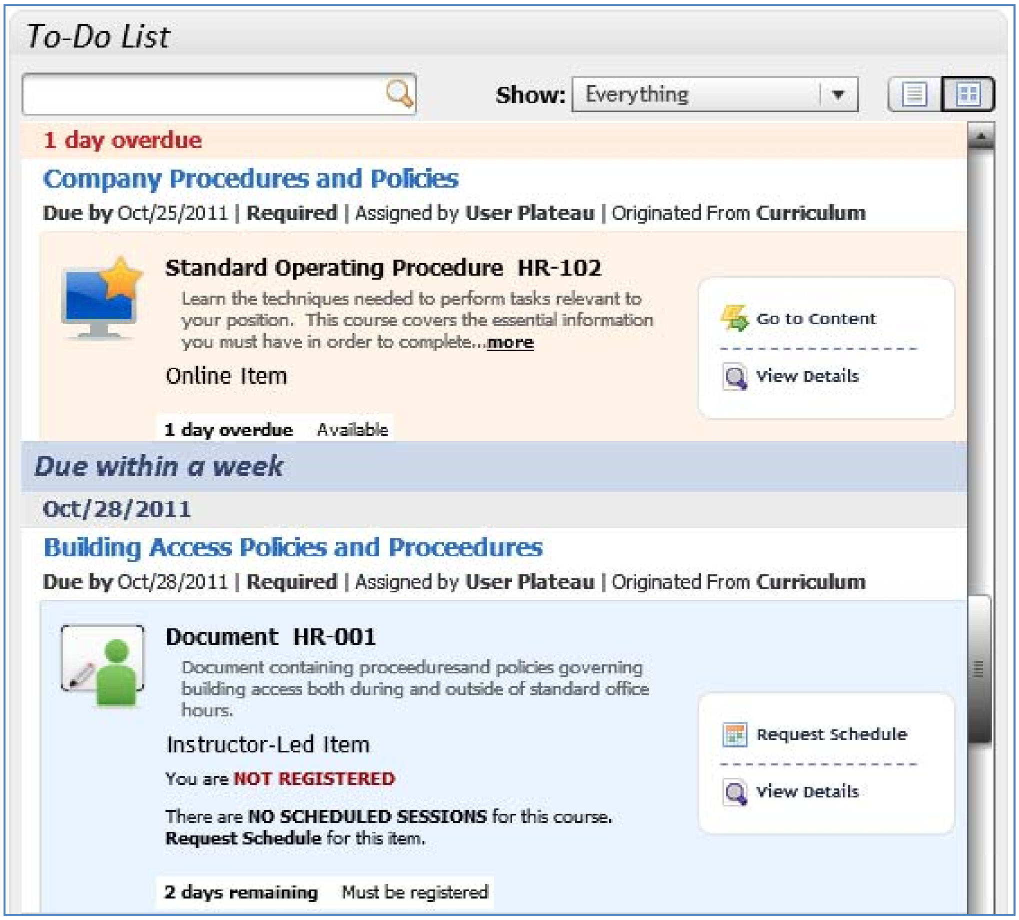


Figure 23. To-Do List Card View

Catalog Search

The Catalog search textbox allows you to enter keywords to perform a quick search for related items in your catalog.

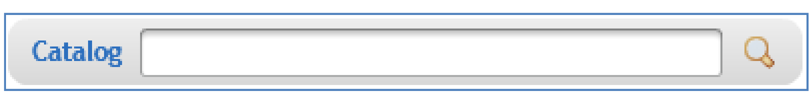


Figure 24. Catalog Search

Enter keywords to search and click the **Search icon** (), or click the Catalog link.

Easy Links and Status Pods

The Easy Links section is another way that you can access some of the most commonly used functions. Similar to the To-Do List, easy links are designed so that you can access other areas of the LMS easily and quickly. For most users, you can typically find what you need by using the To-Do List or the links/buttons in the Easy Links section.

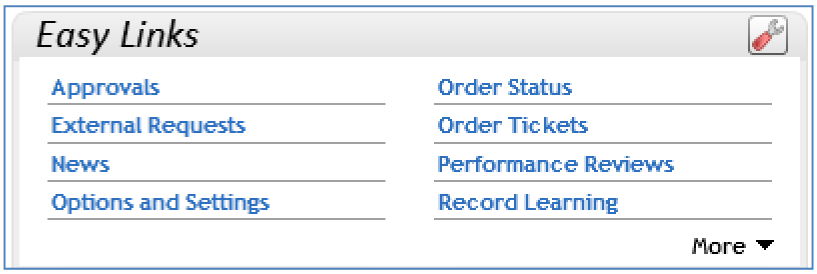


Figure 25. Easy Links

To configure the Easy Links:

- Click the **Configure Easy Links** icon ( ) to customize the links that are always available in this section.
- Click More to show all available links; click Less to show only the links that you configured to always be displayed.

The Status Pods under the Easy Links is a way for users to view a snapshot of progress on various learning and performance activities.

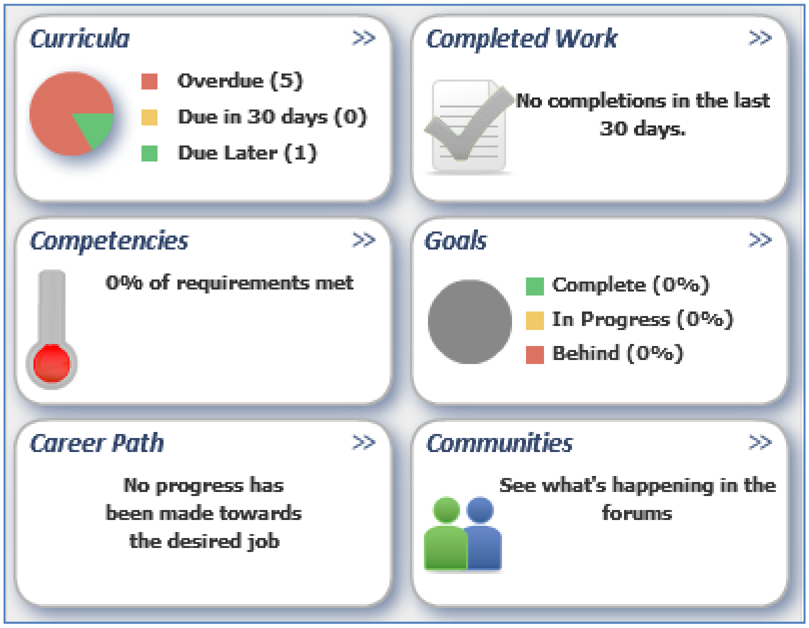
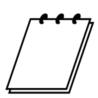


Figure 26. Easy Links



Keep in mind that some links in the Easy Links section may not display depending on your SuccessFactors Learning licenses and your assigned user role.

Sorting Data in Tables

When the LMS displays data in tables, you can sort some columns in ascending or descending order.

Figure 27 is an example of the Completed Work table, which is a list of completed items and their completion statuses. Each row represents a completed event. In this example:

- The table is sorted by the completion date (indicated by the sort icon (1▼) to the right of the column heading).
- The 1▼ indicates the column is sorted in descending order.
- To change the sort order to ascending, click the **Completion Date** column header. The arrow changes to 1▲ and re-sorts the list.
- Click the column heading to sort the list accordingly (i.e., click **Title** to sort the list by title).

Use the filter options at the top to filter by type, title, and status.

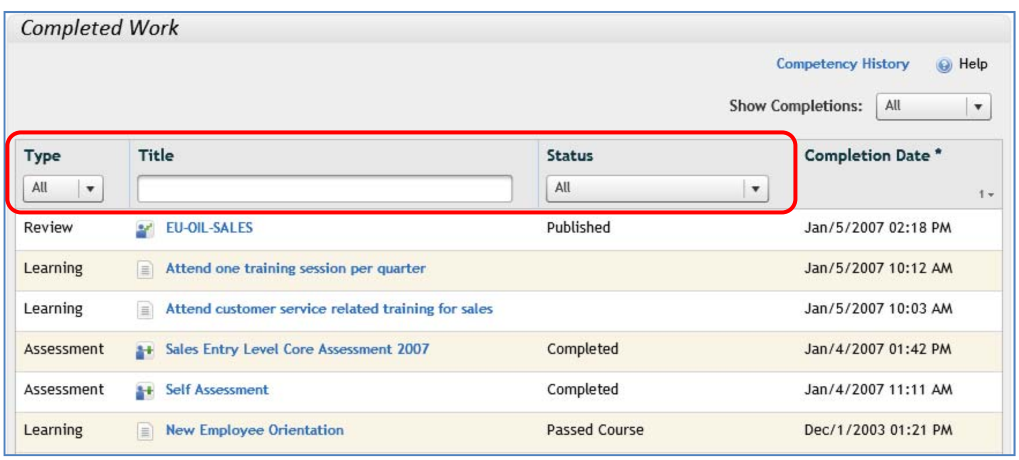


Figure 27. Completed Work

You can further filter the table by completion date by using the Show Completions drop-down menu options to show only completions after, before, or between selected dates. The date entered in the filter is always included in the displayed results.

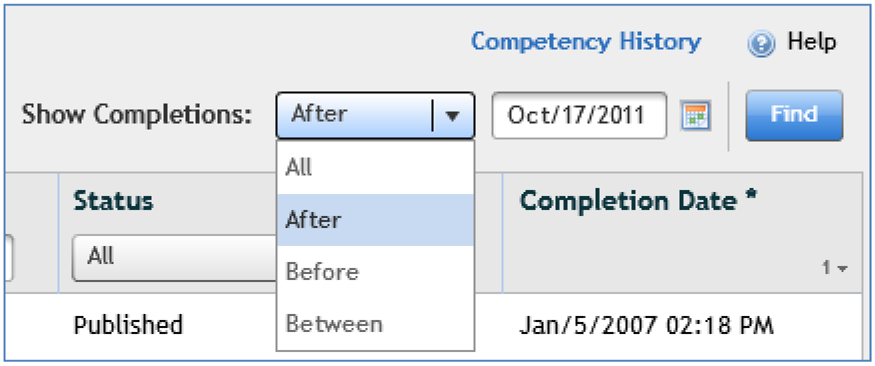


Figure 28. Show Completions

Using Help

SuccessFactors Learning's Help feature is a good resource if you are unsure how to complete a task, define a term, or locate a feature. It contains helpful information on every area of the user application.

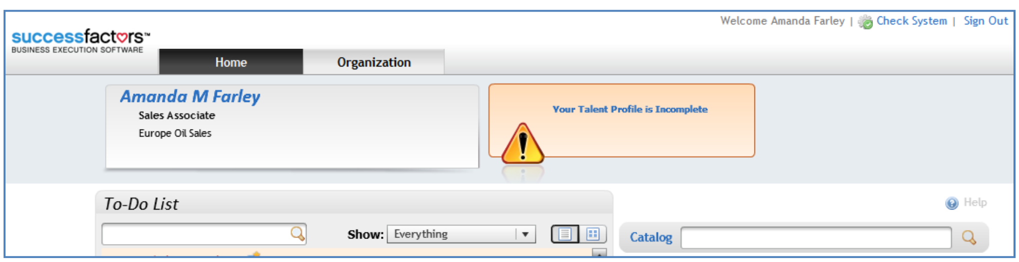


Figure 29. Home Page

To access the online help, locate and click the **Help icon** and **link** (Help) at the right side of any LMS screen. The online help displays in a separate browser window.

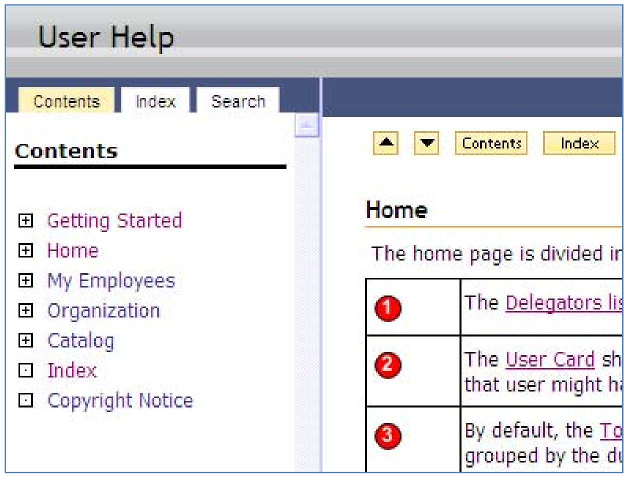


Figure 30. Online Help

There are three areas of help:

- **Contents:** Click the topic pertaining to your question
- **Index:** Alphabetical listing of available help topics
- **Search:** Opens search which allows you to use keyword search

ITEM ASSIGNMENTS

Supervisors, LMS admins, and users may assign learning needs and training requirements. Each assignment is an item. The To-Do List displays all uncompleted item assignments and their required dates. The To-Do List is located on your Home page.

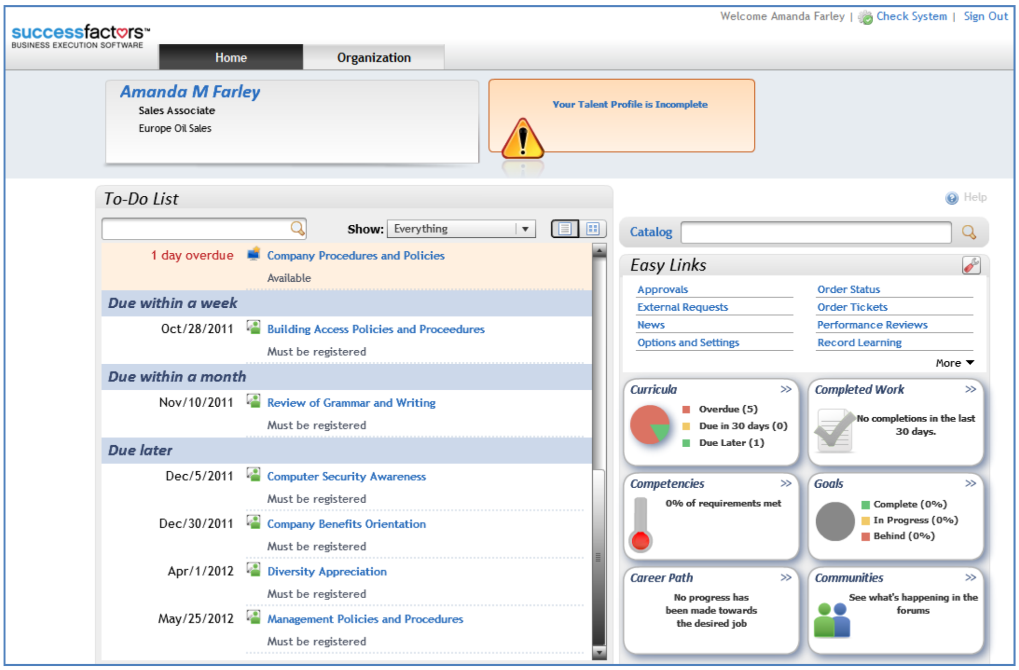


Figure 31. Home Page

Roll your mouse over the item title to display additional item information.

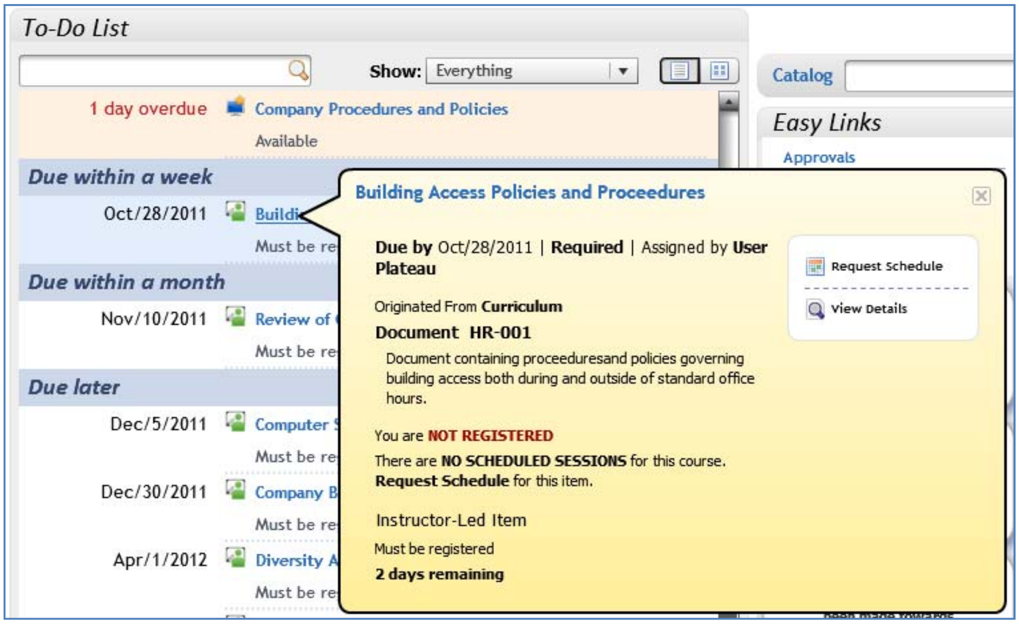


Figure 32. Item Detail Information Card

Click the item title to display the item details screen.

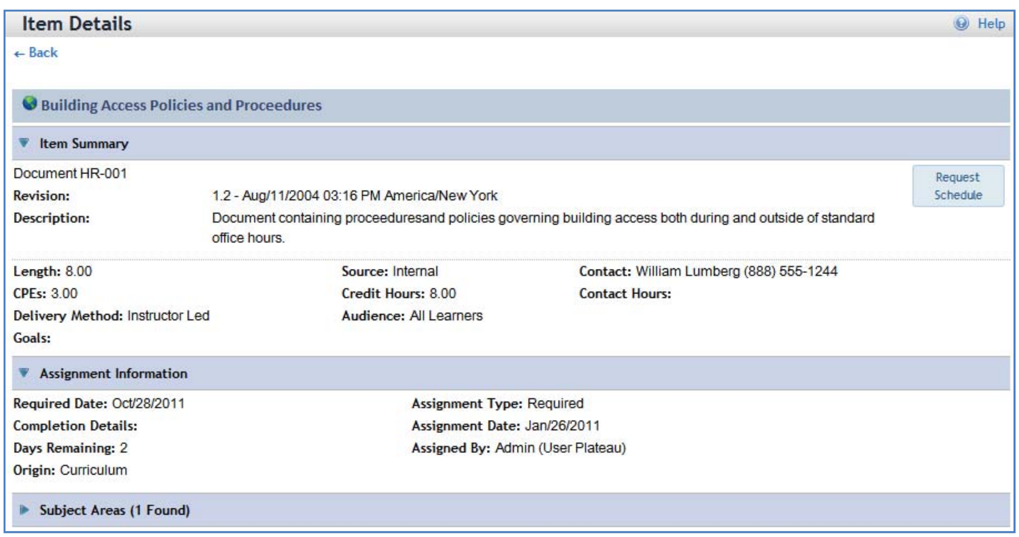


Figure 33. Item Details Screen

Click the **Back** link (← Back) to return to your To-Do List.

Item Statuses and Actions

Table 1 lists the item status and possible corresponding available actions that the LMS displays on the To-Do List. Using the corresponding buttons, you can launch an online item, request a schedule, add an item to your shopping cart (if you are an external user), possibly remove an item, view the schedules of a selected item, and even access a community. As with most user activities, what you are able to do is dependent on the privileges granted to you by your administrator.

Table 1. Item Status and Available Actions

Status	Available Action
Prerequisites not met SuccessFactors Learning does not permit registration until you successfully complete all prerequisites. However, depending on configuration, you may be able to register for the item if you are currently enrolled in the prerequisite.	**Request Schedule** Request Schedule Indicates there are no available scheduled offerings. **Register** Register Because you are enrolled in the prerequisite for this item, there are scheduled offerings available now in which you can register. This button takes you to the registration process. **Remove** Remove from To-Do List If the item is not required or it was self-assigned, you can remove it from your To-Do List.
Enrolled SuccessFactors Learning reserved a seat for you in a scheduled offering.	**View registration** View registration View registration details on the Registration page. If you self-registered, you can withdraw.
On Waitlist You are on a waitlist for a scheduled offering. If a user withdraws, SuccessFactors Learning automatically registers you into the scheduled offering.	**View registration** View registration View registration details on the Registration page. If you self-registered, you can withdraw.

Status	Available Action
Enrolled, In Session You registered for a scheduled offering, and the class is currently in session.	View registration — View registration View registration details on the Registration page. If you self-registered, you can withdraw.
Enrolled, Not in Session You registered for a scheduled offering, and the offering is not currently in session. However, the scheduled offering start date has passed and the end date is in the future.	View registration — View registration View registration details on the Registration page. If you self-registered, you can withdraw.
Example: If a scheduled offering is three days long, from 9AM – 5PM each day, and you check your To-Do List at 7:00 PM on the second day, your status is “Enrolled, Not in Session.”	
Not Available The content is offline and unavailable.	Remove — Remove from To-Do List If the item is not required or it was self-assigned, you can remove it from your To-Do List.
Must be Registered Item requires registration. If item is blended, online content is unavailable until you enroll in a scheduled offering.	Register — Register There are scheduled offerings available and you are not registered; takes you to the registration process. Remove — Remove from To-Do List If the item is not required or it was self-assigned, you can remove it from your To-Do List. Request Schedule — Request Schedule Indicates there are no available scheduled offerings. Access Community — Access Community Available if there is a community associated with the item or scheduled offering
Locked Out SuccessFactors Learning or an administrator locked the item.	Remove — Remove from To-Do List If the item is not required or it was self-assigned, you can remove it from your To-Do List.

Status	Available Action
Available You have not launched any of the available online content for this item.	Go to Content Go to Content Available if online content exists and is active at that time (some online content is only available during specific times and requires enrollment into a scheduled offering). Remove Remove from To-Do List If the item is not required or it was self-assigned, you can remove it from your To-Do List.
Enrolled / Launch during session You are registered in a blended learning item. The online content is only available at specific times during the scheduled offering.	View registration View registration View registration details on the Registration page. If you self-registered, you can withdraw. Remove Remove from To-Do List If the item is not required or it was self-assigned, you can remove it from your To-Do List.
In Progress You previously launched the online content for this item.	Go to Content Go to Content Online content is available to launch. Remove Remove from To-Do List If the item is not required or it was self-assigned, you can remove it from your To-Do List.

Once the user successfully completes an item, SuccessFactors Learning records a learning event and lists it under the Completed Work table. If the item does not require retraining, the LMS removes it from the To-Do List. On the other hand, an item may require that you complete it on a regular basis. The LMS updates the required date of this item based on the retraining interval.

Items that require retraining remain on the To-Do List.

Viewing Item Details

The title of an item on the To-Do List and in the catalog is a link. Click to open the item details screen.

Figure 34. Item Details

The item details may display the following:

- **Item Summary:** Item ID, Revision Number and Date, Description, Length, Audience, Contact, CPE (Continuing Professional Education), Source, Contact Hours, Goals, Credit Hours, and Delivery Method.
- **Assignment Information:** Required Date (due date), Assignment Type (Required or Optional), Completion Date, Assignment Date, Days Remaining (it is negative when past due), Assigned By (Admin, Supervisor, or self), Origin (e.g., assigned from Development Plan).
- **Subject Areas:** The item category (used when browsing the catalog).

- **Prerequisites:** Before you are able register for this item, you must successfully complete the items listed. From this section, you can add the prerequisite items to your Learning Plan.
- **Substitutes:** Other items that grant credit for this item (e.g., Microsoft Advanced Word grants substitute credit for Microsoft Basic Word).
- **Competencies:** Competencies that the item addresses. When you complete the item successfully, you can achieve a higher rating in the competencies.
- **Related Documents:** Click the document title to view the file. Related documents can include pre-work, class readings, and additional information.

Assigning Items to Your To-Do List

You can assign items to your To-Do List by using the catalog. Remove any non-required items from your To-Do List by clicking the **Remove** button ().

To assign items to your To-Do List:

1. Enter keywords in the Catalog search textbox, or click the **Catalog** link.

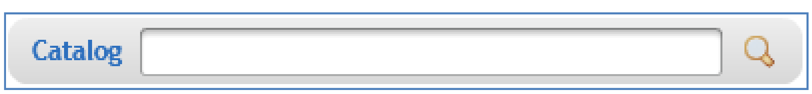


Figure 35. Catalog Search

Refer to "Using the Catalog" for searching instructions.

2. Use the browse catalog, simple search, or advanced search options to search for items.

3. Click **Add to To-do List** in the Action column.

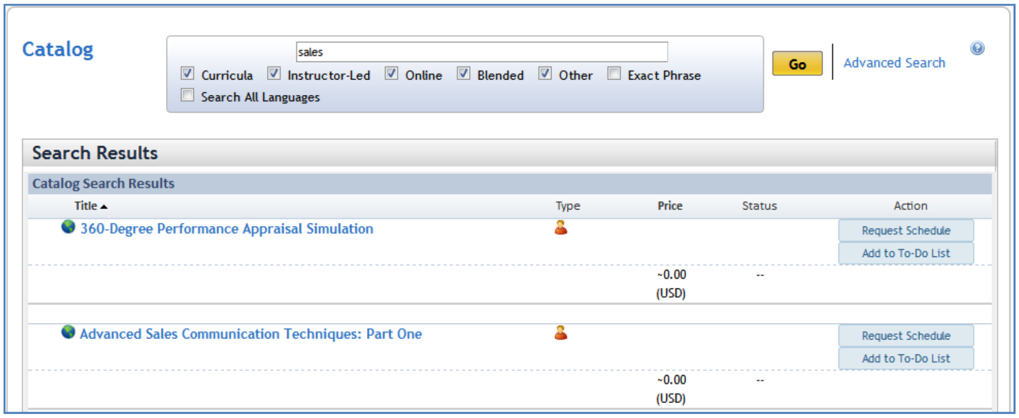


Figure 36. Catalog Search Results

Viewing Grouped Item Assignments (Curricula)

SuccessFactors Learning groups items to assign and tracks them as single units called curricula. The items of assigned curricula appear on the To-Do List. View curricula and their member items under the Curriculum Status page. This status page also displays your completion status of the assigned curricula.

To view your curriculum status, click **Curricula** from the Easy Links section.

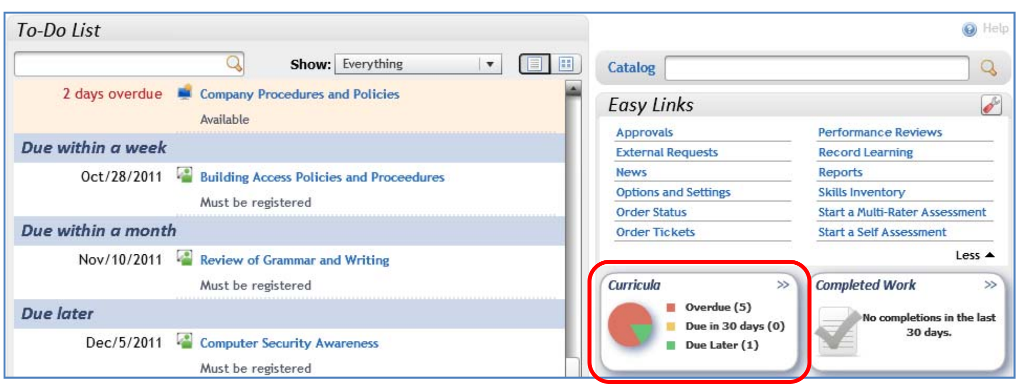


Figure 37. Home Page: Curricula Easy Link

Figure 38 indicates the actions you can take on the Curriculum Status screen.

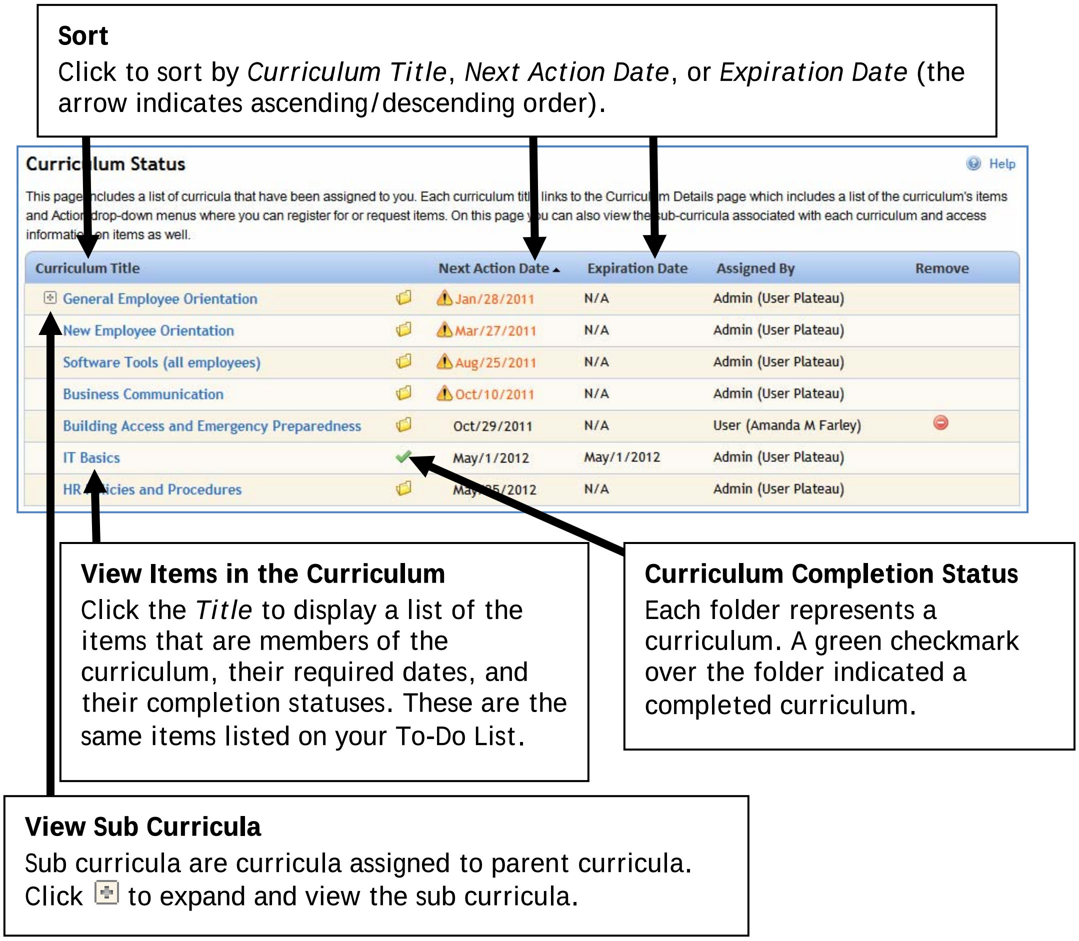


Figure 38. Curriculum Status Screen

Assigning Curricula to Your To-Do List

To assign a curriculum to your To-Do List using the catalog:

1. Click the **Catalog** link on the Home page.
2. Enter keywords in the simple catalog search area to filter the catalog search.

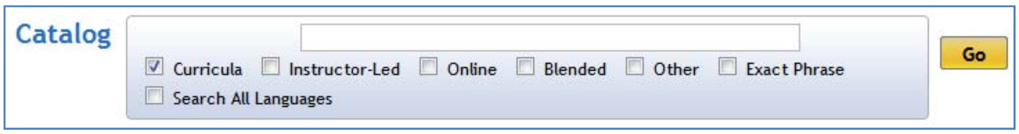


Figure 39. Simple Catalog Search

3. Verify the **Curricula** checkbox is checked.
4. Click **Go** to display your search results.

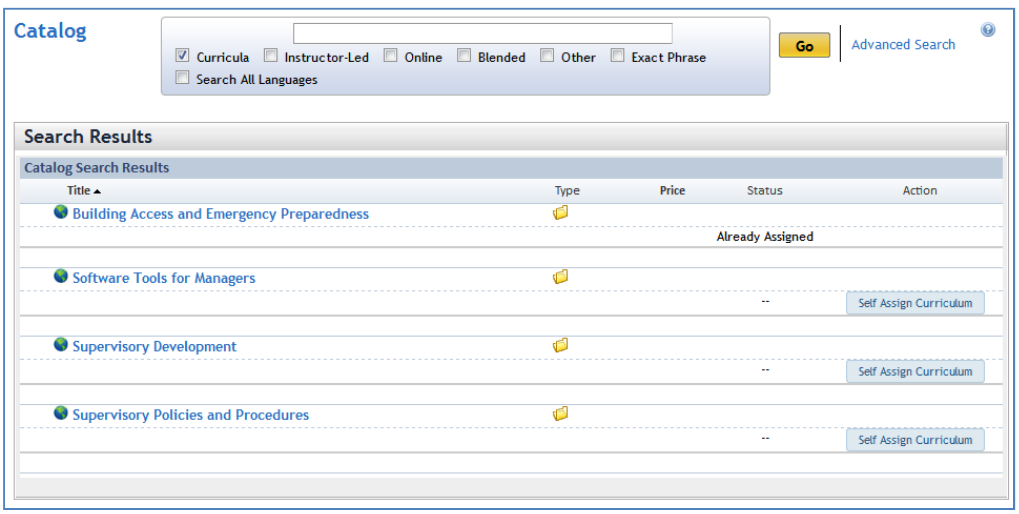


Figure 40. Simple Catalog Search Results

5. Click **Self Assign Curriculum** in the Action column to add the curriculum items to your To-Do List.

USING THE CATALOG

The catalog contains items, available scheduled offerings, and curricula for self assignment. Use the catalog to locate items, scheduled offerings, and curricula, assign items to your To-Do List, launch online items, register for scheduled offerings, and self-assign curricula.

To search the catalog, click the **Catalog** link.

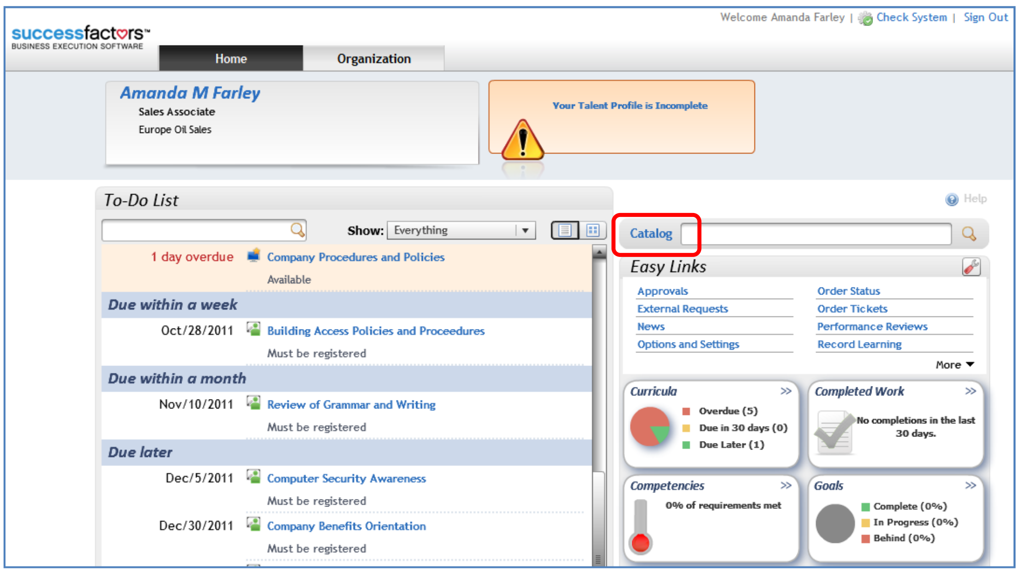


Figure 41. Catalog Sub-Menu

There are four ways to search the SuccessFactors Learning catalog:

- **Browse Catalog:** Items grouped by subject areas
- **Simple Catalog Search:** Item keyword and type search
- **Advanced Catalog Search:** Provides more search fields than simple catalog search
- **Calendar of Offerings:** Displays future scheduled offerings in a calendar view

Browse Catalog

Click the **Catalog** link on the Home page to browse your catalog.

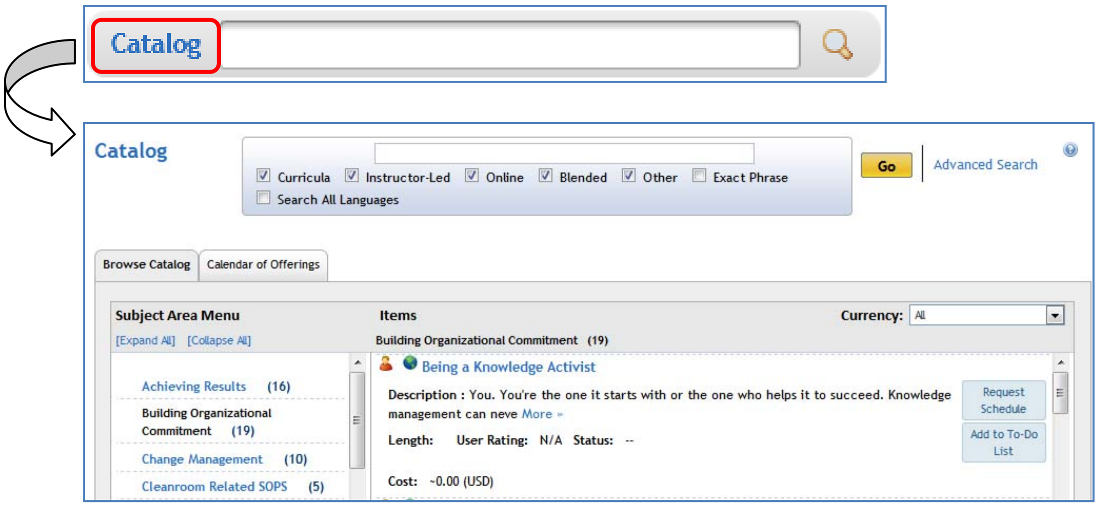


Figure 42. Browse Catalog Screen

The Browse Catalog screen displays available items by subject areas. In this view, an item may fall under one or more subject areas. Clicking a subject area displays items assigned to that subject area. (*If an item is not associated with a subject area, SuccessFactors Learning does not display it under the Browse Catalog function.*)

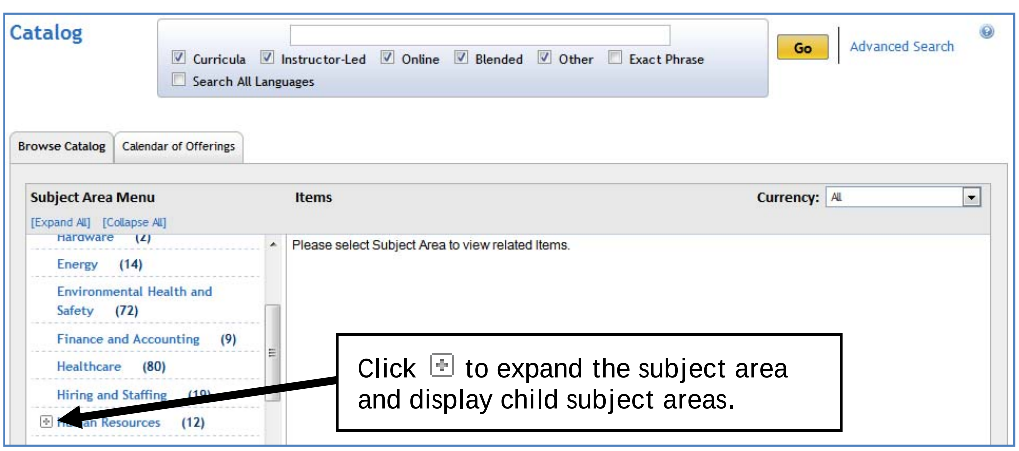


Figure 43. Browse Catalog

Scheduled offerings may belong to more than one subject area.

Simple Catalog Search

Use the simple catalog search section at the top of the screen to search for the keywords in the title and description fields of the items and curricula. Leave the Keywords textbox blank and click **Go** to display all items and curricula in the catalog. Finally, complete the simple catalog search filter by selecting an item type or curricula – Curricula, Instructor-Led, Online, Blended, and Other.

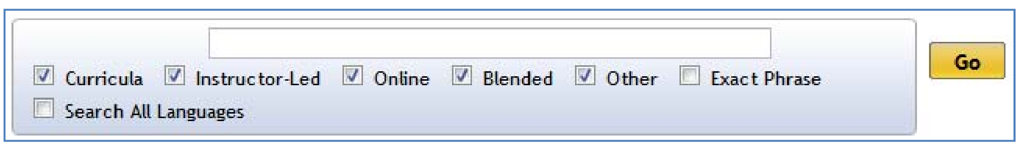
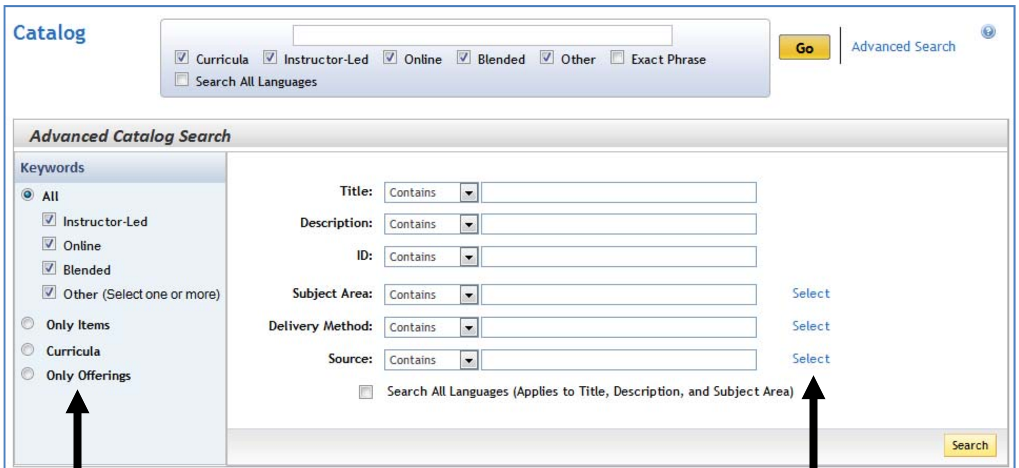


Figure 44. Simple Catalog Search

Select the checkbox for…	For the search to include…
Curricula	Curricula
Instructor-led	Items that are time based and led by instructors
Online	Items that only contain online content
Blended	Items that are time based, led by instructors, and contain online content
Other	Items that are completed outside of the LMS, such as reading a book or watching a video.
Exact Phrase	Exact text entered in the *Keywords* field
Search All Languages	All locales in the keyword search

Advanced Catalog Search

Click the **Advanced Search** link to access the advanced catalog search screen. SuccessFactors Learning searches the catalog for items and curricula that meet all of the criteria entered on this page.



Use the Select link to search for *Subject Area*, *Delivery Method*, and/or *Source* values.

Search for *All* allows you to search for all item types. Or select the appropriate radio buttons to search for *Only Items* or *Curricula* or *Only Offerings*.

Figure 45. Advanced Catalog Search

If you select the **Only Offerings** radio button on the Advanced Catalog Search screen, the search options display the *Facility* and dates search criteria.

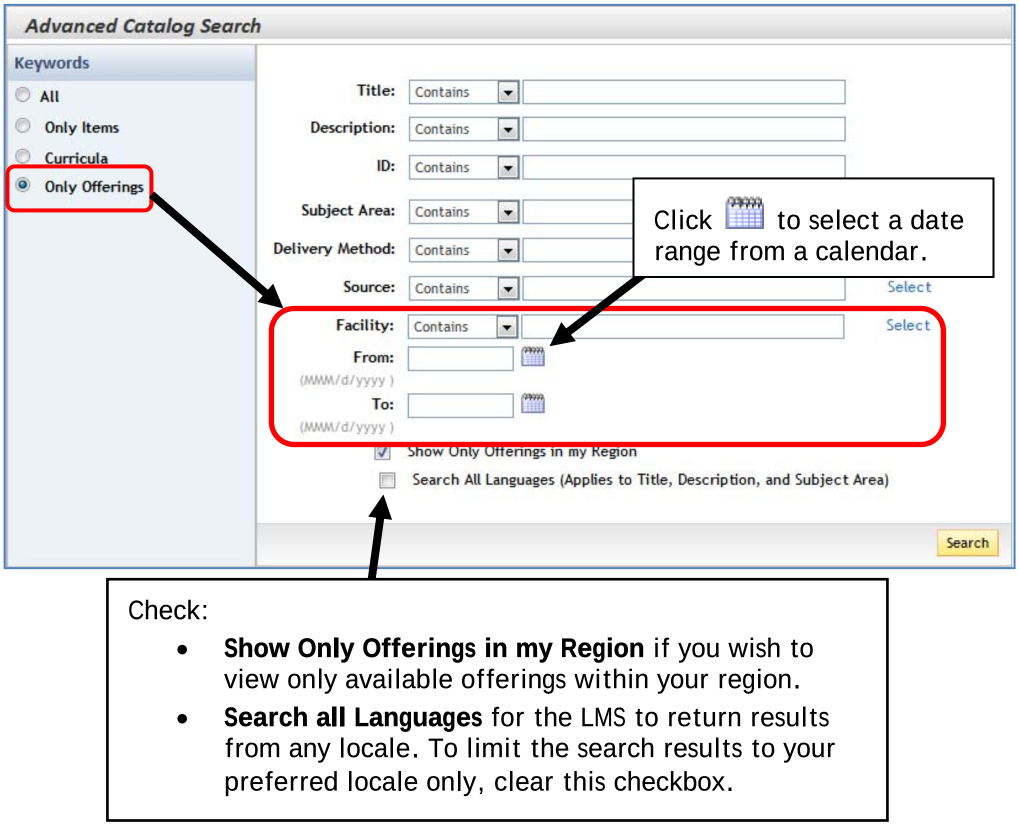


Figure 46. Advanced Catalog Search for Only Offerings

Calendar of Offerings

Search the catalog for a scheduled offering of a subject area by month, week, or day using the interactive calendar. Select the **Calendar of Offerings** tab.

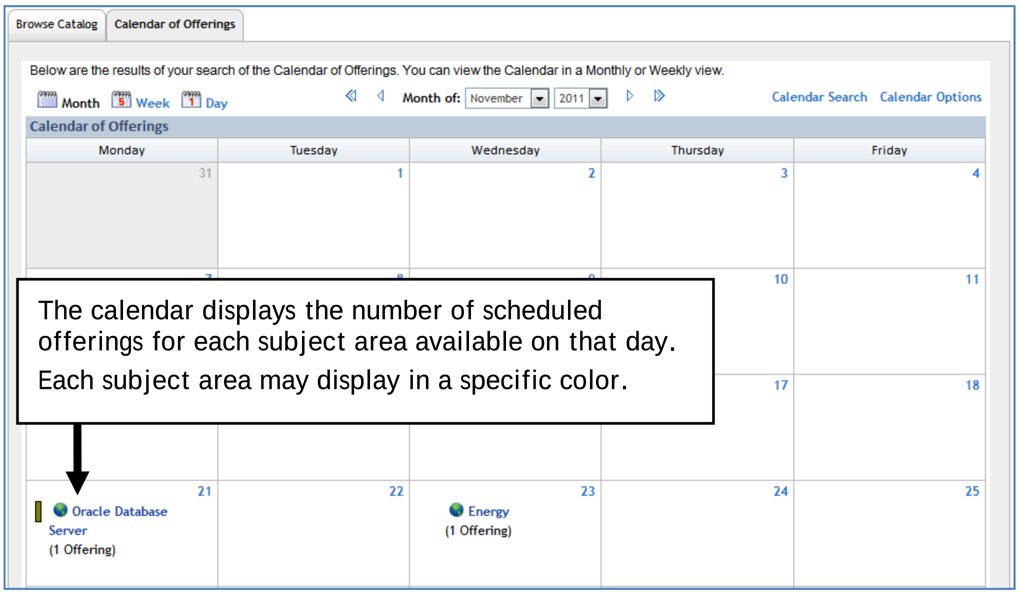


Figure 47. Calendar of Offerings: Monthly View

Click the subject area link to view the scheduled offerings. Click the description link to display the segment details for the scheduled offering.

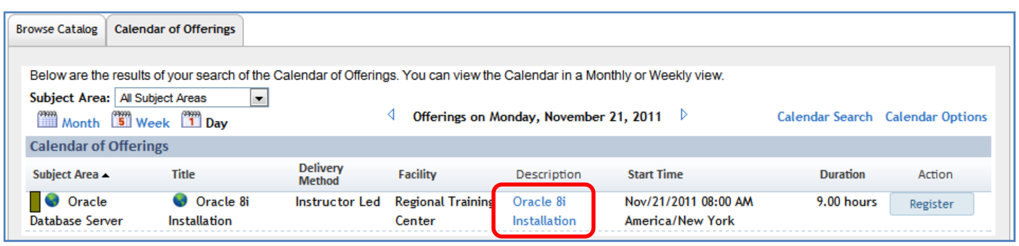


Figure 48. Calendar of Offerings: Day View

Modifying the Calendar Display Mode

To modify the calendar display mode, click the **Calendar Options** link on any calendar screen.

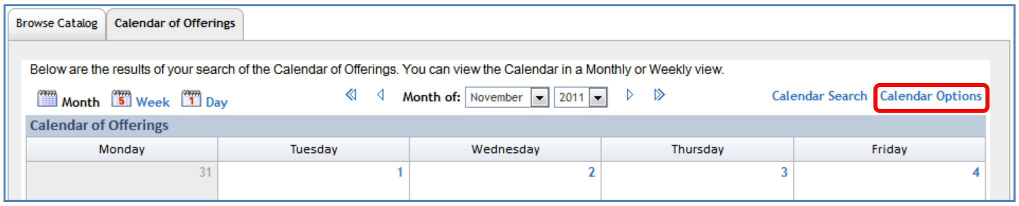


Figure 49. Calendar of Offerings Display Options

The Calendar Options screen displays. Use the checkboxes and radio buttons to edit and save your calendar display preferences. Check the **Remember Calendar Mode** checkbox to set the default calendar mode (e.g., month, week, or day).

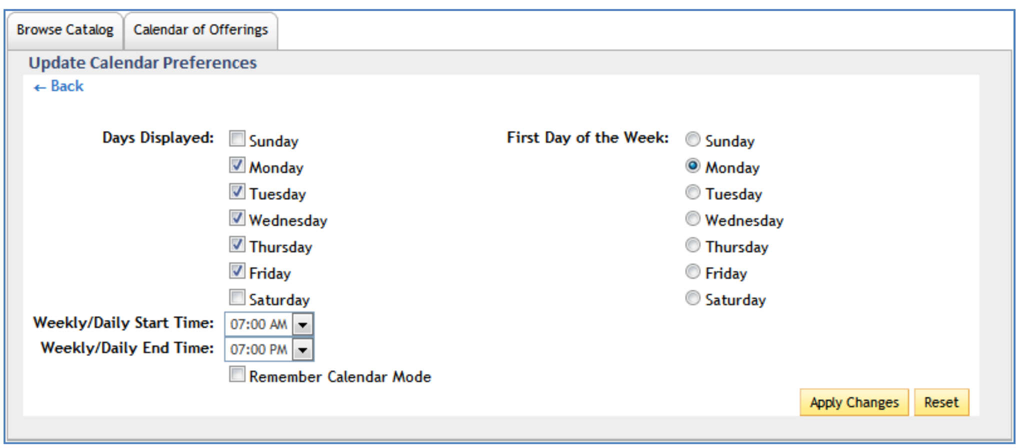


Figure 50. Update Calendar Preferences

Click **Apply Changes** to save your preferences.

Monthly View

Click **Month** to view the calendar in month mode.

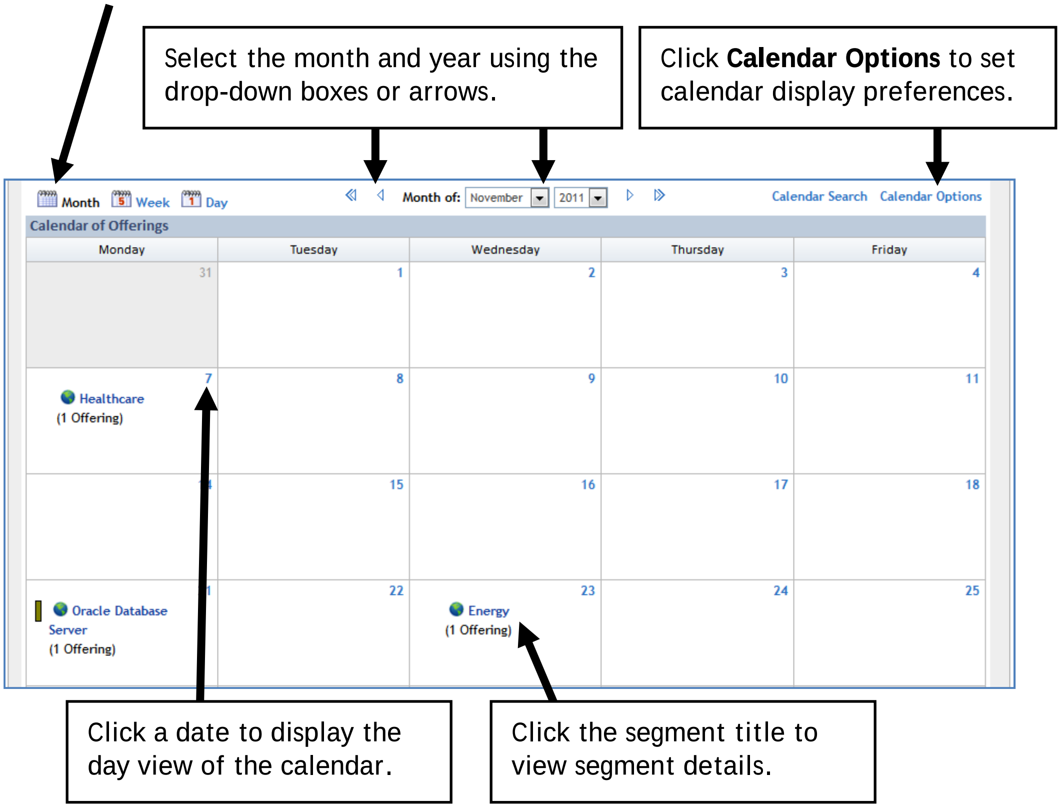


Figure 51. Calendar of Offerings: Monthly View

Go to week or day view by clicking the Week or Day icon.

Weekly View

Click the **Week** icon to view the calendar in week mode.

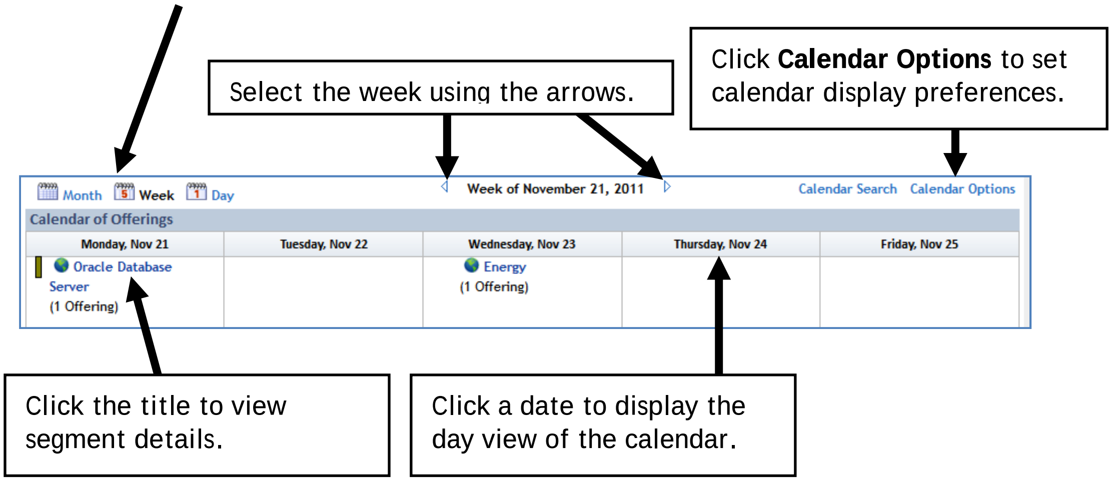


Figure 52. Calendar of Offerings: Weekly View

Go to month or day mode by clicking the Month or Day icon.

Daily View

Click **Day** to view the calendar in day view.

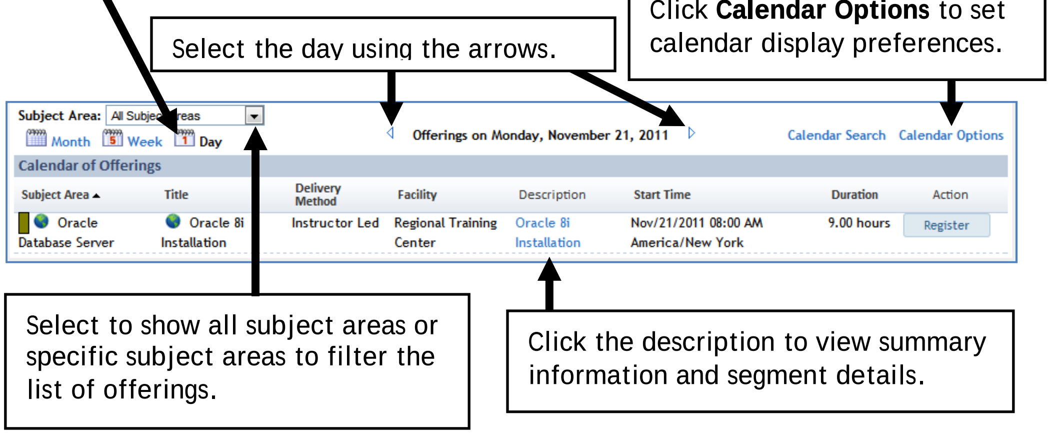


Figure 53. Calendar of Offerings: Daily View

Go to month or week view by clicking the Month or Week icon.

REGISTRATION

A scheduled offering is an instructor-led item offered at a specific date and time. Segments are the individual units of the scheduled offering. For example, scheduled offering MS Word Basics meets on 11/12/2011 from 8AM to 12PM and 1PM to 5PM. Each block of time, *8AM–12PM* and *1PM–5PM*, is a segment. The segment details list the exact meeting dates and times of the segments.

Supervisors and admins can register you into scheduled offerings. SuccessFactors Learning reserves a seat when you are registered for the offering. Registration status is located on your To-Do List.

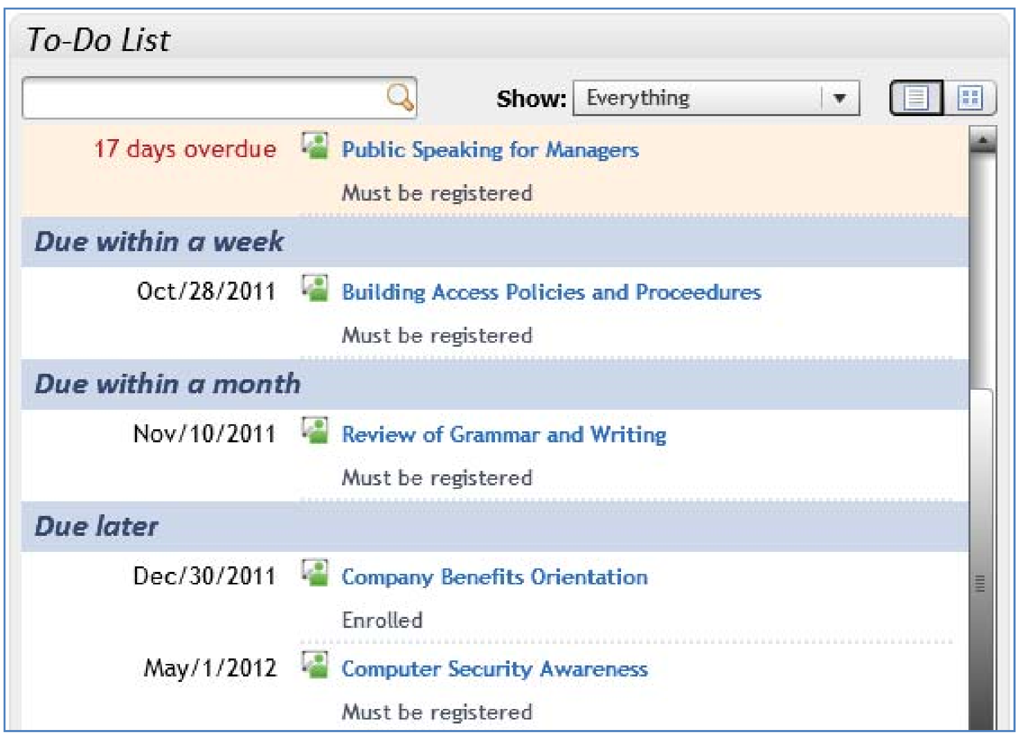


Figure 54. To-Do List

To see only your current registrations on your To-Do List, select **Registrations** from the Show drop-down menu.

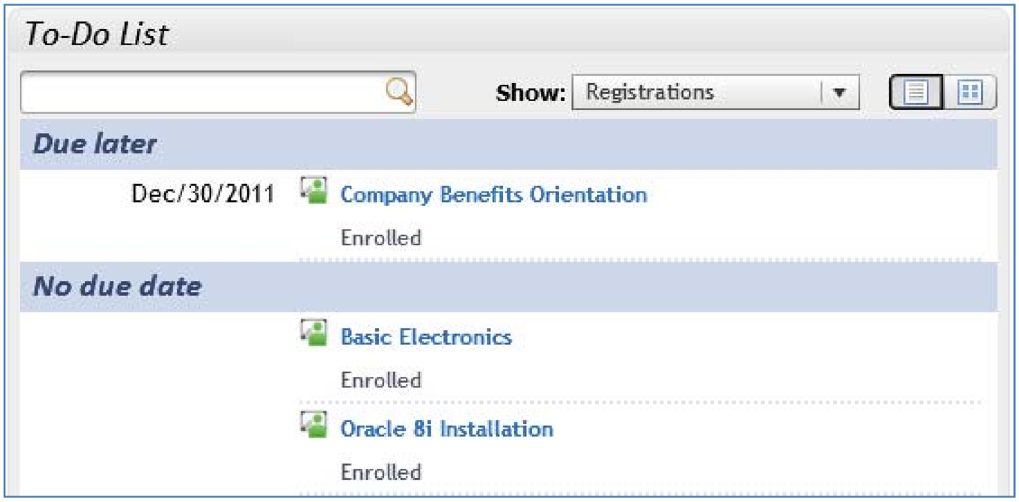


Figure 55. To-Do List: Registrations Only

Refer to "Viewing Registrations" for more information on current enrollment.

Self-Registering

Scheduled offerings may allow self-registration. If you are unable to self-register, contact your LMS administrator. There are two ways to self-register into a scheduled offering:

- From your To-Do List
- From the catalog

Registering from your To-Do List

You can register for scheduled offerings of items on your To-Do List in one of two ways.

The first way is to:

1. Locate the item on your To-Do List.
2. Hover your mouse over the item title link to display the item summary card.

Figure 56. To-Do List: Item Card

3. If scheduled offerings are available, the **Register** button displays.
4. Click **Register** to display the Registration screen.

Click ***View Details*** *to see segment details, contact person, number of users registered, and registration cutoff date.*

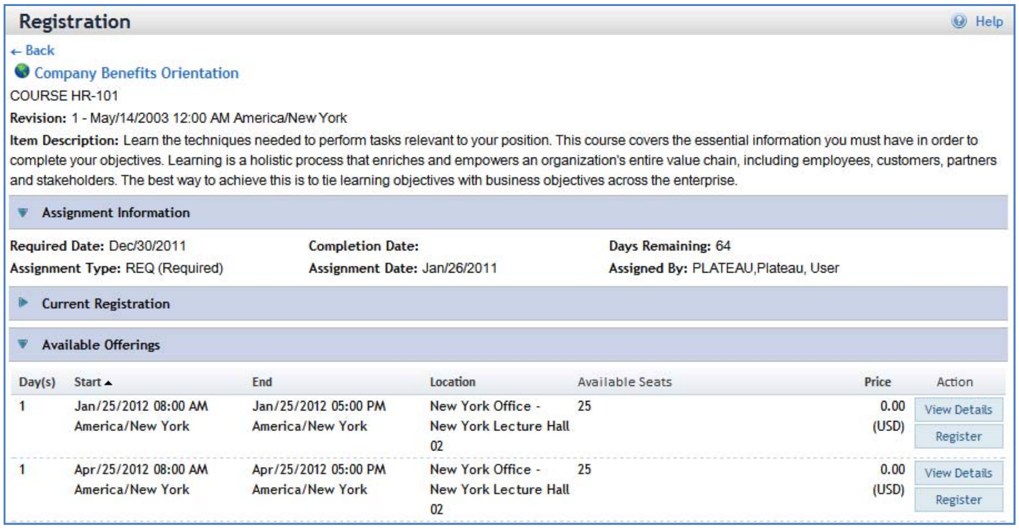


Figure 57. Registration Screen

5. Review the available dates and times.

6. Click **Register** to enroll in the scheduled offering.

7. Click **Confirm** to confirm the registration.

The second way to register for scheduled offerings from your To-Do List is:

1. Locate the item on your To-Do List.

2. Click the **item title** link to display the Item Details screen.

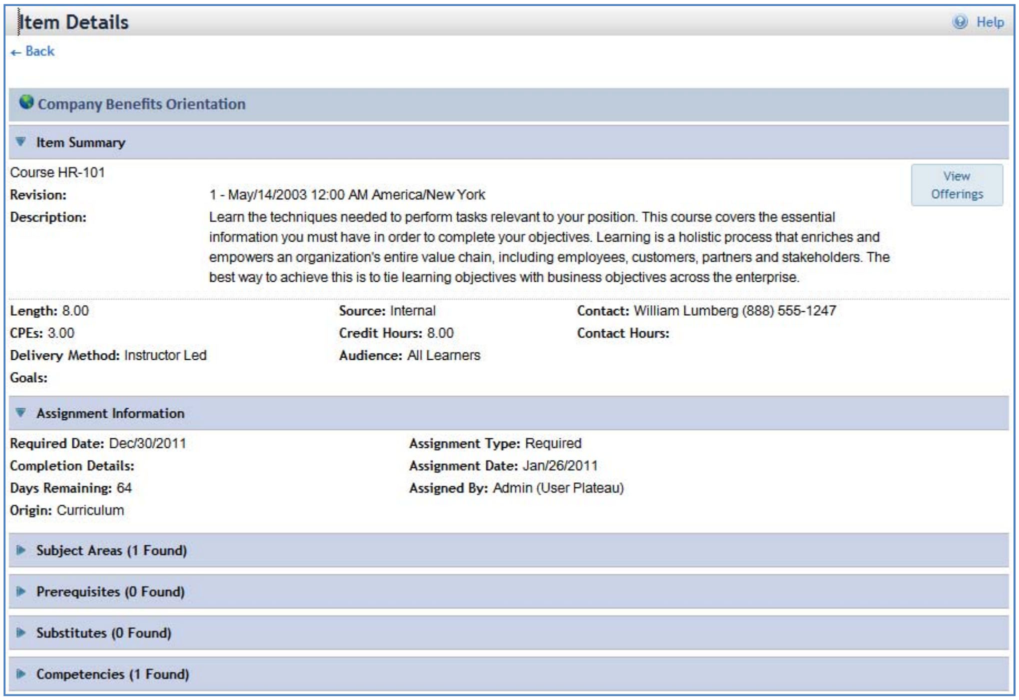


Figure 58. Item Details Screen

3. Click **View Offerings** to display the Registration screen.

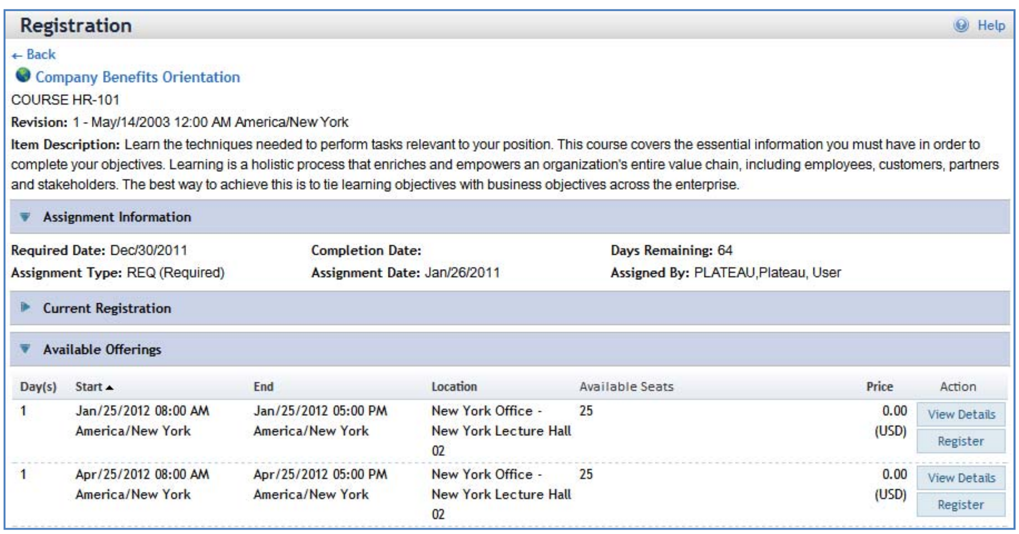


Figure 59. Registration Screen

4. Review the available dates and times.

5. Click **Register** to enroll in the scheduled offering.

6. Click **Confirm** to confirm the registration.

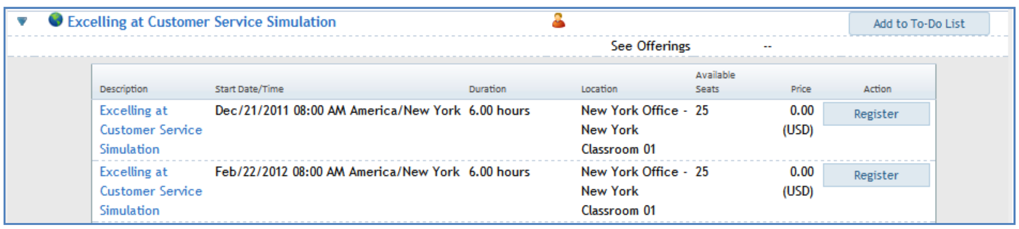
Registering from the Catalog

To register for a scheduled offering directly from the catalog:

1. Search for the item (refer to “Using the Catalog”).

2. Locate the item in the search results (items with available scheduled offerings have a ▶ next to the title).

3. Click the expand arrow to display the available scheduled offerings.



Description	Start Date/Time	Duration	Location	Available Seats	Price	Action
Excelling at Customer Service Simulation	Dec/21/2011 08:00 AM America/New York	6.00 hours	New York Office - New York Classroom 01	25	0.00 (USD)	Register
Excelling at Customer Service Simulation	Feb/22/2012 08:00 AM America/New York	6.00 hours	New York Office - New York Classroom 01	25	0.00 (USD)	Register

Figure 60. Available Scheduled Offerings

4. Click **Register** in the Action column to register into the corresponding scheduled offering. (If the Register button does not display next to the offering, self-registration is unavailable.)

Click the item description link to view segment details, contact person, number of users enrolled, and registration cutoff date.

5. Enter any comments (special needs, requirements, etc.) about your registration in the Comments textbox on the Registration screen.

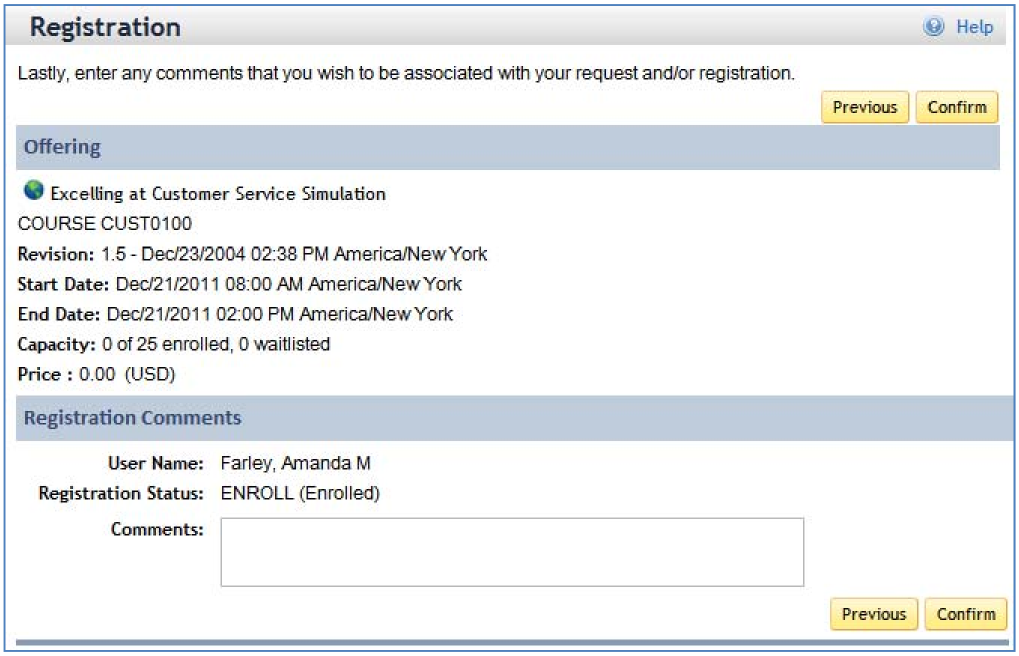


Figure 61. Registration Screen

6. Click **Confirm**.

7. SuccessFactors Learning displays a registration confirmation and sends a registration email to you and your supervisor. The item is also added to your To-Do List.

Viewing Registrations

SuccessFactors Learning assigns one the following registration statuses once you complete registration:

- **Enrolled:** The LMS reserved a “seat” in the scheduled offering
- **Waitlisted:** The scheduled offering reached its maximum registration. If a seat becomes available, the LMS automatically registers you for the scheduled offering and changes your registration status to *Enrolled*.

There are two places in SuccessFactors Learning to view your registration:

- **To-Do List:** Registered items display with the registration status in the Status column
- **Registration screen:** A list of future scheduled offerings and corresponding registration status

To-Do List

The To-Do List displays your registration status below the item title.

Figure 62. To-Do List

To see additional details, click the **Change to Card View** icon ( ) to change the To-Do List view.

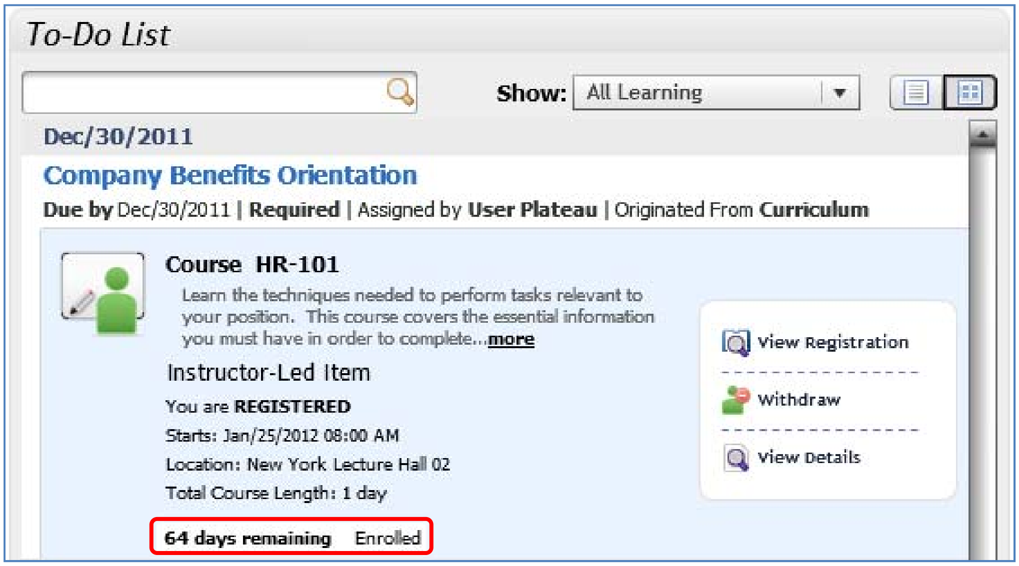


Figure 63. To-Do List: Card View

Click **View Details** to display the Item Details screen.

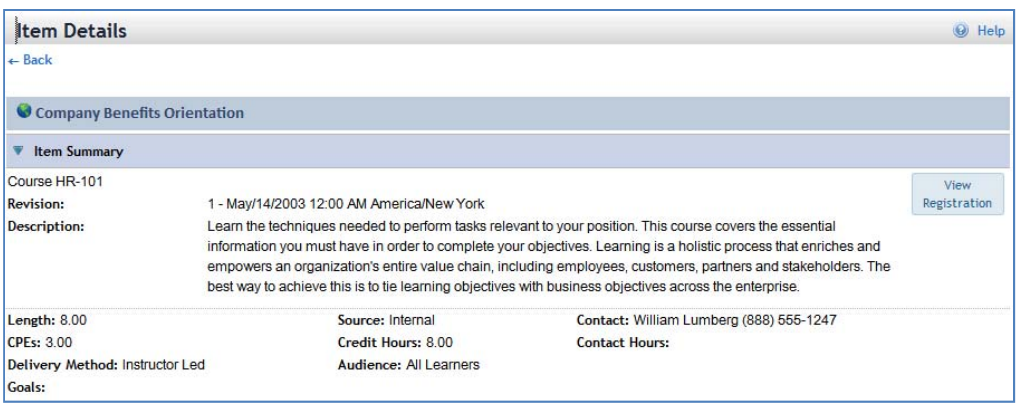


Figure 64. Item Details Screen

Click **View registration** to view the registration details including start and end date and time, location, and status.

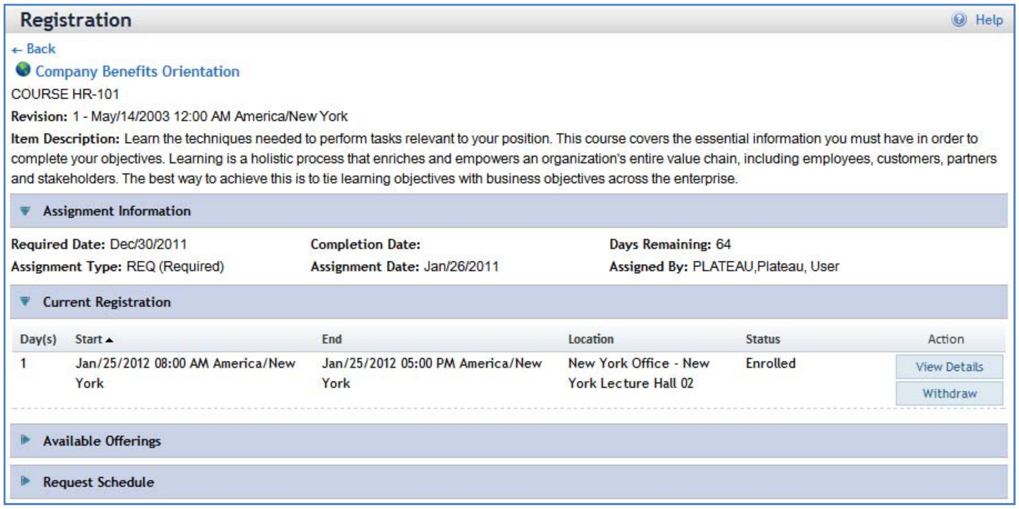


Figure 65. Registration Screen

Registrations

To view your current registrations, select **Registrations** from the Show drop-down menu to filter the items listed on your To-Do List.

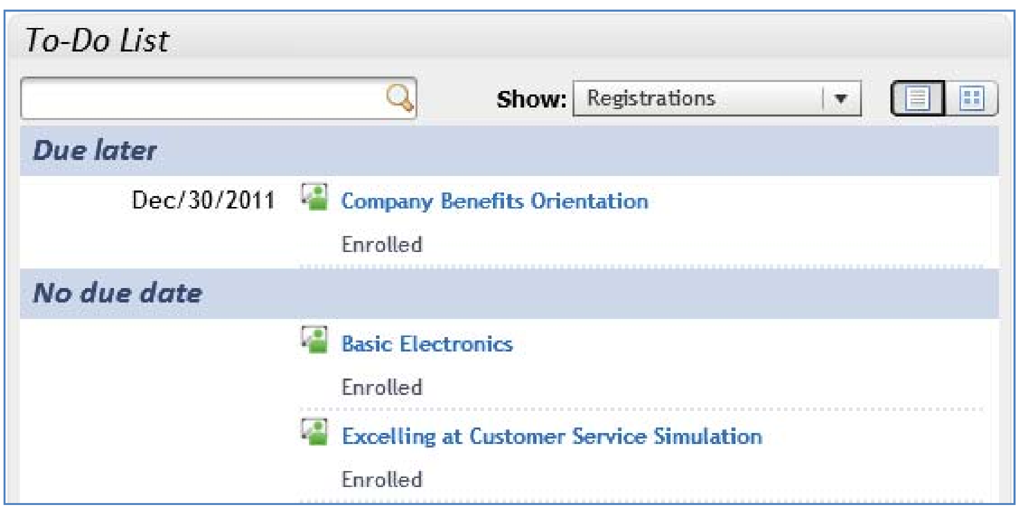


Figure 66. To-Do List: Registrations Only

EMAIL NOTIFICATIONS

SuccessFactors Learning contains many standard emails that it may send to the user population. For example, you may receive emails when item assignments are coming due, or when item requirements are overdue.

Additionally, the LMS sends email notifications when you self-register for a scheduled offering. The registration notification contains:

- Contact person for the scheduled offering
- Times, dates, and locations of the segments
- Additional information entered by the instructor

Do not reply to these system-generated emails. Send an email with questions to the contact person listed in the email or contact a LMS administrator.

Problems Receiving Email

If you are not receiving email from SuccessFactors Learning, verify that your email address is correct.

1. Click your name in the User Card on the Home page.

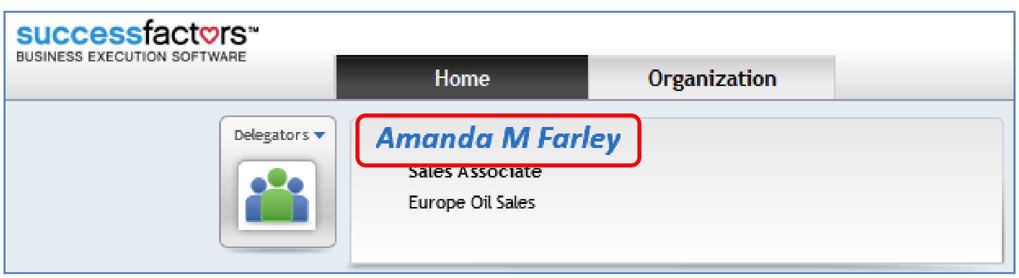


Figure 67. User Card

2. Your profile displays. If necessary to update your email address, click the **edit icon** ( ).

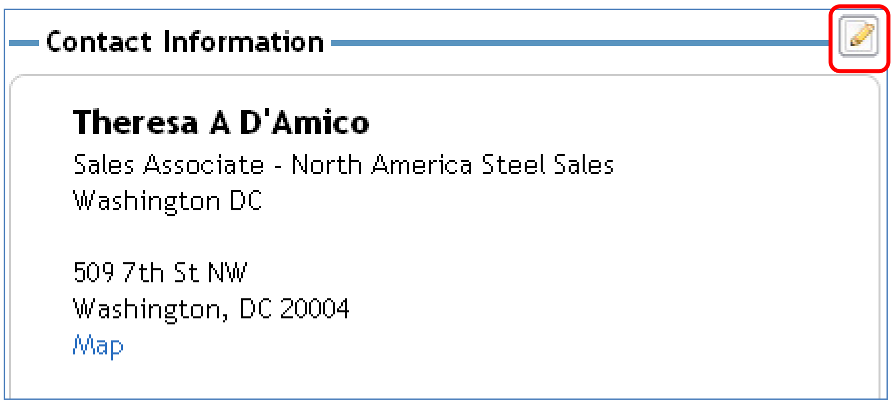


Figure 68. Talent Profile: Edit Contact Information

3. The Edit Contact Information pop-up window displays.

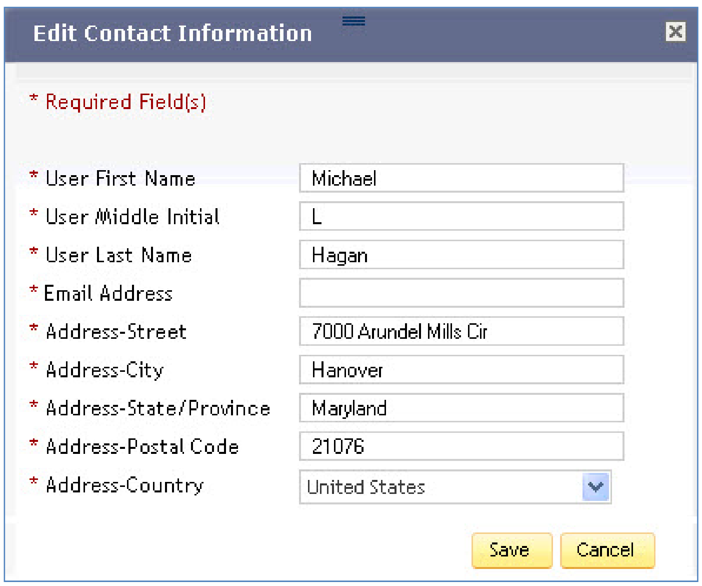


Figure 69. Edit Contact Information

4. Enter your email address in the Email Address textbox.

5. Click **Save** to update your record in the LMS with your email address.

If your email address is correct, contact your LMS administrator to investigate the email issue.

LAUNCHING ONLINE CONTENT

Online content, or web-based training (WBT), is courseware that you complete entirely over the Internet without instructor interaction. SuccessFactors Learning represents online items, asynchronous online content, with the online icon ( ). This enables you to complete the content at your own convenience.

Blending learning, on the other hand, combines online content with instructor-led training into one item. SuccessFactors Learning represents these items with the blended icon ( ). Launching blended online content requires registration into a scheduled offering.

From your To-Do List or the catalog:

1. Click **Go to Content** to display the Online Content Structure screen.

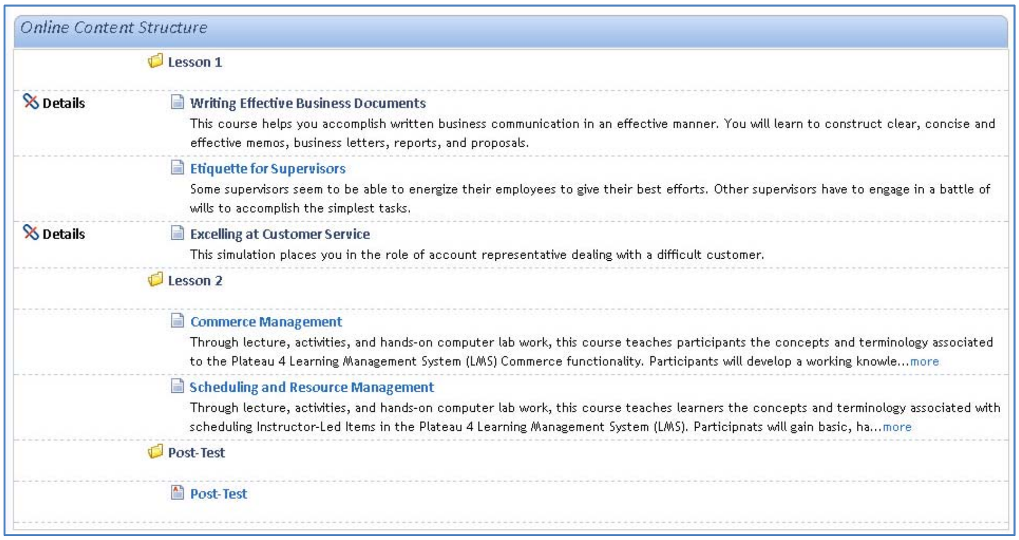


Figure 70. Online Content Structure Screen

2. Click a content link (e.g., Navigation) to launch the content. SuccessFactors Learning opens the content in a new window.

Disable any active pop-up blockers.

3. Once you complete the item, the LMS automatically records the learning event in your Completed Work list.

Completing Items

Attending scheduled offerings, launching and completing online content, or reading a document are ways you complete items. A learning event is the recorded attempt to complete an item. After an administrator records a learning event (e.g., Passed, Failed, Incomplete, etc.), Plateau Learning lists the event under your Completed Work list. Plateau Learning automatically records a learning event for online items.

Viewing Completed Work

A learning event is a record of the item ID and title, date and time of your attempt, and the completion status. Click the item title to view additional information including item ID, item revision date, grade, hours, instructor, and comments. To view your Completed Work list, click the **Completed Work** status pod on your Home page. The status pod also shows the number of completions within the last 30 days.

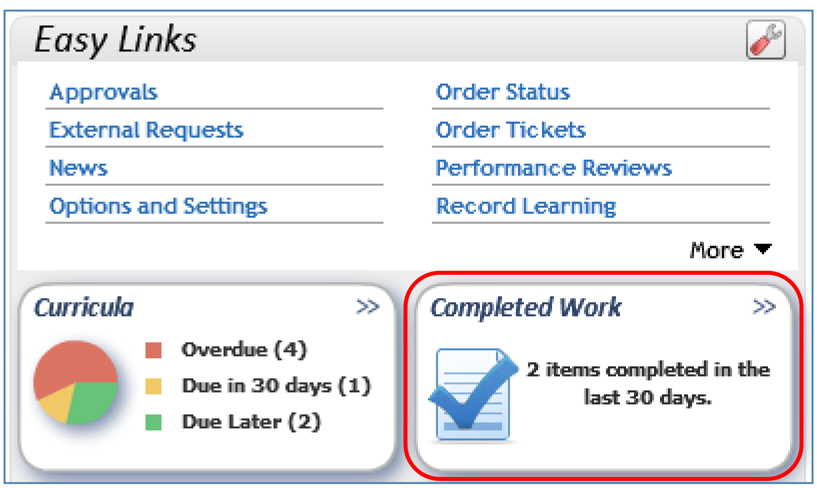


Figure 71. Completed Work Status Pod

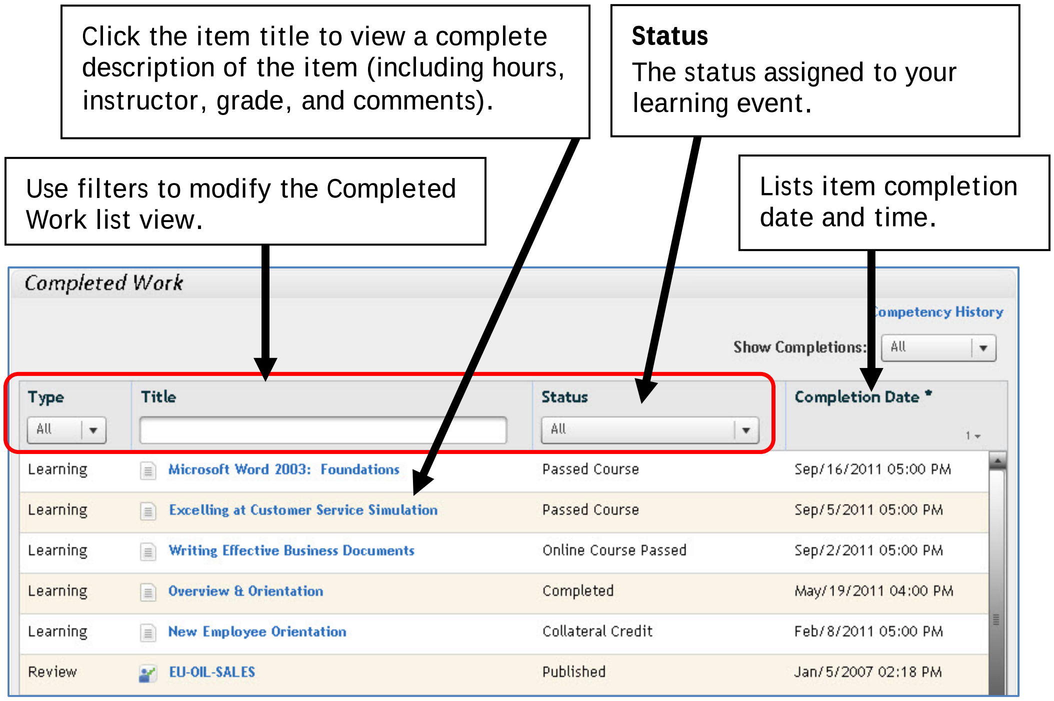


Figure 72. Completed Work Screen

Completion date can be filtered using the Show Completions drop-down menu options located above the table by selecting after, before, or between specific dates. The date entered on the filter is always included in the displayed results.

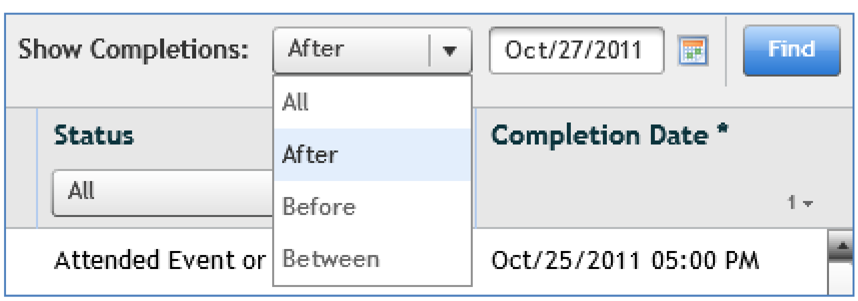


Figure 73. Show Completions Filter for Completed Work

Users can also sort the Completed Work list by clicking the table header. Click again to change the listed order (ascending to descending and vice versa). The sorted column is indicated with a number and arrow in the column header.

Figure 74. Completed Work Sort Feature

Click the item title to display the Completed Work Details screen. This screen provides the course title, completion date, status, and other details.

Roll your mouse over the item title.

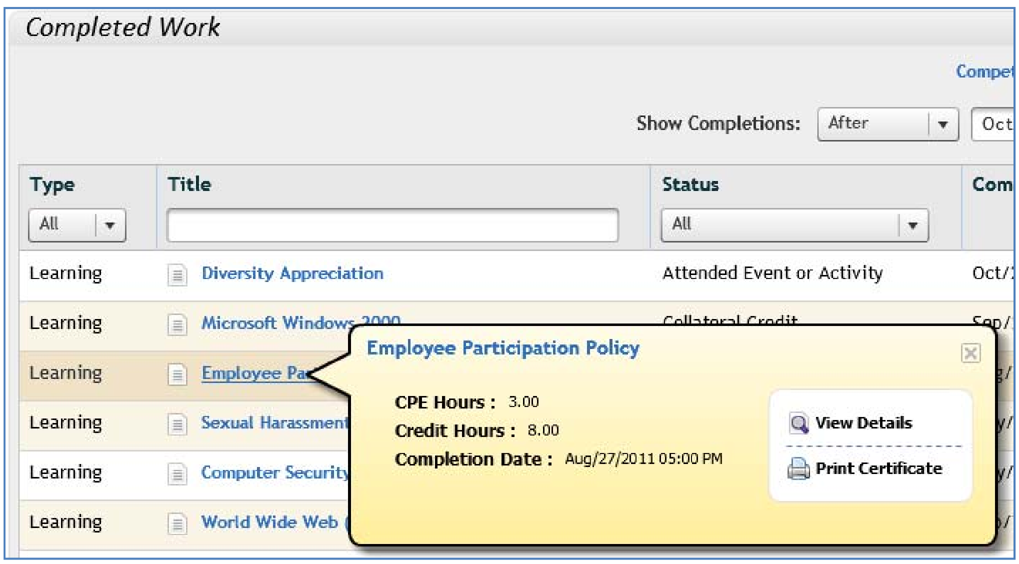


Figure 75. Completed Work Item Card

Click **View Details** to display the Completed Work Details screen.

Click **Print Certificate** to generate a certificate of completion in a separate browser window for printing.

RUNNING REPORTS

Plateau Learning can generate reports about your learning. To run a report:

1. Click **Reports** from the Easy Links section of your Home page.

Figure 76. Reports Easy Link

Click the More *link or the* Configure Easy Links *icon if you do not see the Reports link.*

2. View the list of available reports on the Reports screen.

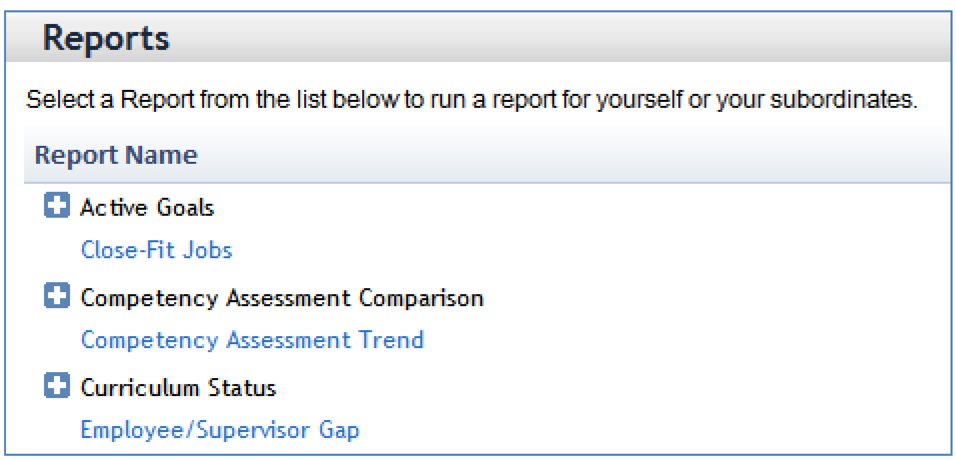


Figure 77. Available Reports

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.

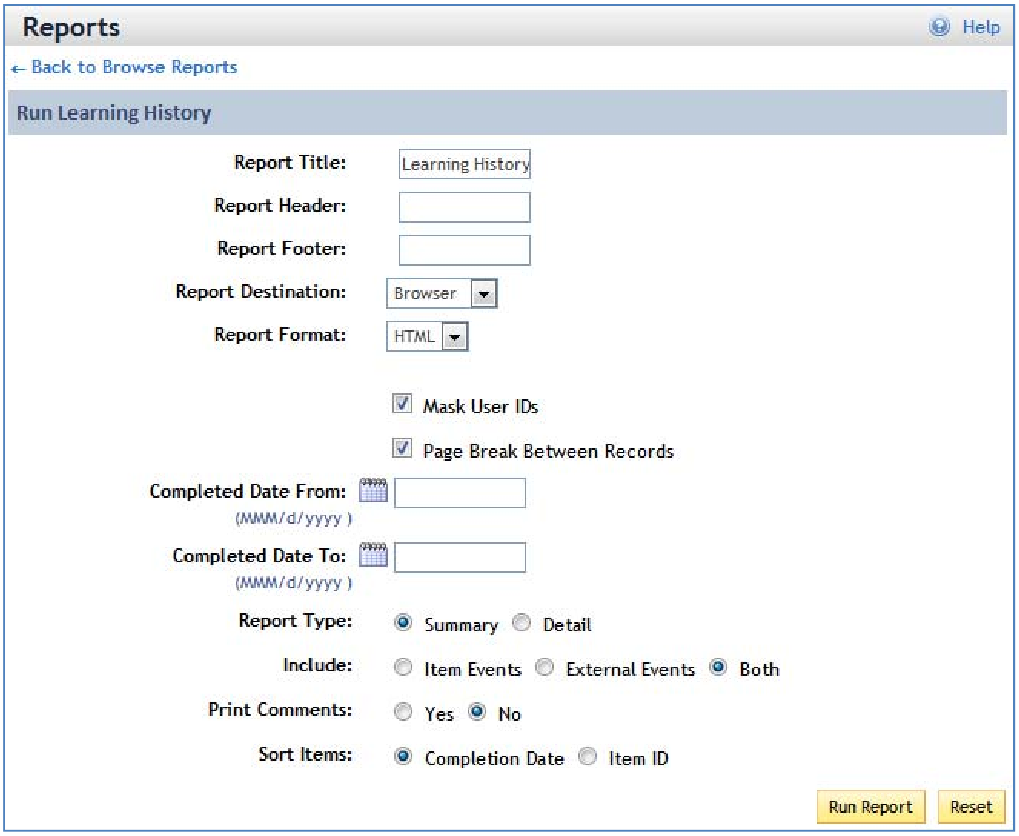


Figure 78. Run Report Screen

5. Each report page has two sections:

   – The top section determines report layout

   – The bottom section allows you to select criteria of interest

- *The reports list varies by implementation and is based on the products licensed.*
- *Use the context sensitive help to view a brief description of each report.*
- *Disable any pop-up blockers to enable reports to display in a separate browser window.*

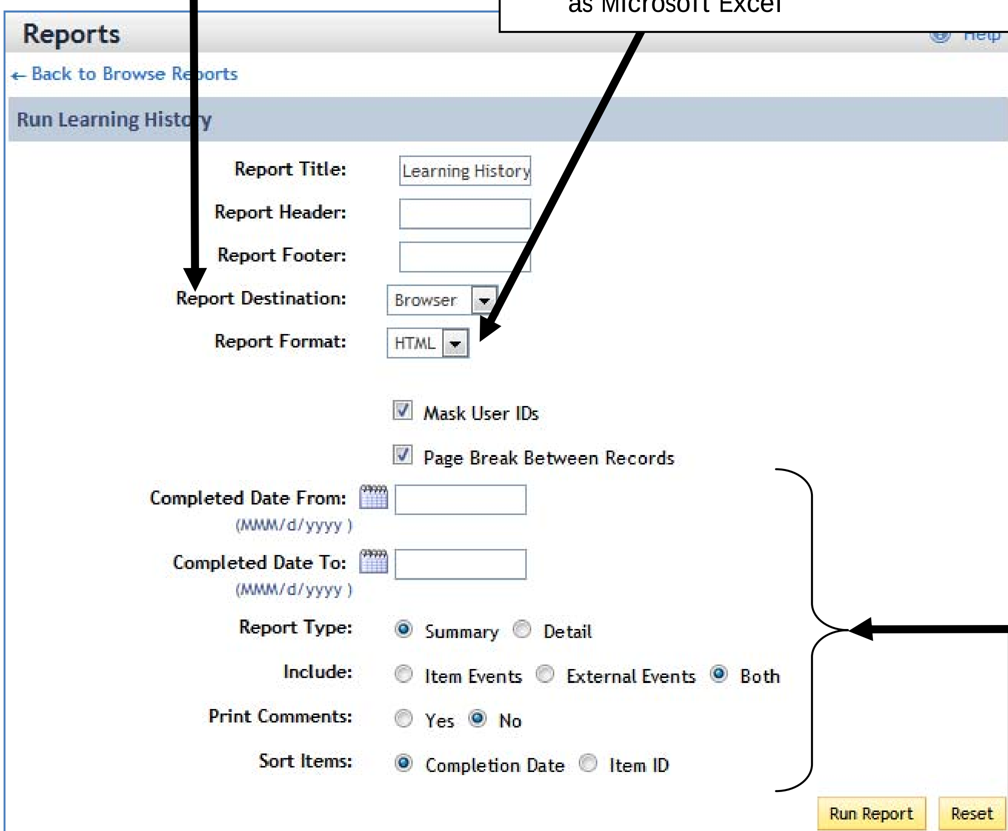
Figure 79 illustrates the options available when running reports and how to define the report layout and criteria.

Report Destination

- Select **Browser** to generate the report in a new browser window.
- Select **Local File** to generate the report to save it as a local file.

Report Format

- HTML for viewing your results quickly in the browser
- PDF for printing and saving
- XML for importing data into a database
- CSV for opening in a spreadsheet, such as Microsoft Excel



Report Criteria

Each report has related criteria such as range of dates, level of detail, and grouping/sorting of results.

Refer to online **Help** for details on each report and related criteria.

Figure 79. Run Report Options

6. Once the layout and criteria are defined, click **Run Report**.

SUMMARY

This user's reference guide provided you with the basics of the SuccessFactors Learning Management System, including how to navigate within the system, access your To-Do List, browse and search the catalog for items, assign items to your To-Do List, register for available scheduled offerings, launch online content, view your Completed Work, and run reports.

Contact your learning administrator if you have further questions.