



# SUCCESSFACTORS LEARNING USER OVERVIEW REFERENCE GUIDE



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## Confidential and Proprietary

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## 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](mailto: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.

successfactors<sup>™</sup>  
BUSINESS EXECUTION SOFTWARE

**Welcome**

To sign in, enter your user ID and password in the space provided to the right and click the Sign In button. If you have forgotten your user ID or password, links below the sign in box will assist you in recovering your credentials. If you do not have an ID and would like to register, please click the "New User?" link below the sign in box.

**Welcome!** Please Sign In

User ID:

Password:

**Sign In**

[Forgot Password?](#) [Forgot ID?](#) [New User?](#)

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.

A screenshot of the SuccessFactors LMS user login screen. At the top left, there is a blue speech bubble containing the word "Welcome!". To its right, the text "Please Sign In" is displayed. Below this, there are two input fields: "User ID:" followed by a text box, and "Password:" followed by a text box. To the right of the password field is a yellow "Sign In" button. At the bottom of the form area, there are three links: "Forgot Password?", "Forgot ID?", and "New User?".

Figure 2. User ID and Password

2. Click the **Forgot Password?** link to have your password emailed to you.
3. Enter your user ID in the User ID textbox.

A screenshot of the "Password Reminder" screen. At the top left is the "successfactors™" logo with "BUSINESS EXECUTION SOFTWARE" underneath. The main heading is "Password Reminder". Below the heading, the text reads: "Enter your User ID then click **Submit** to have your Password sent to your email account." There is a "User ID:" label followed by a text input field and a yellow "Submit" button.

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.

A screenshot of a web form titled "ID Reminder". The form contains the instruction "Enter your Email address then click 'Submit' to retrieve your ID". Below this is a text input field labeled "Email Address:" followed by a yellow "Submit" button.

**ID Reminder**

Enter your Email address then click 'Submit' to retrieve your ID

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.

The screenshot displays the SuccessFactors user interface for Amanda M Farley, a Sales Associate in Europe Oil Sales. The interface includes a navigation bar with 'Home' and 'Organization' tabs, a user profile card, and a warning message: 'Your Talent Profile is Incomplete'. The main content area is divided into a 'To-Do List' on the left and a 'Catalog' on the right. The 'To-Do List' shows tasks categorized by due date: '1 day overdue' (Company Procedures and Policies), 'Due within a week' (Building Access Policies and Procedures), 'Due within a month' (Review of Grammar and Writing), and 'Due later' (Computer Security Awareness, Company Benefits Orientation, Diversity Appreciation, and Management Policies and Procedures). The 'Catalog' section features an 'Easy Links' menu with 'Options and Settings' highlighted in a red box. Other links include Approvals, External Requests, News, Order Status, Order Tickets, Performance Reviews, and Record Learning. Below the 'Easy Links' are several performance and progress widgets: 'Curricula' (5 overdue, 0 due in 30 days, 1 due later), 'Completed Work' (0 completions in the last 30 days), 'Competencies' (0% requirements met), 'Goals' (0% complete, 0% in progress, 0% behind), 'Career Path' (no progress towards desired job), and 'Communities' (see what's happening in the forums).

Figure 5. Easy Links > Options and Settings



The Options and Settings screen displays.

**Options and Settings** Help

Your settings determine the formats and standards used to display information to you in the application.

**Update Account Security Information**

\* = Required Fields

Password: \*\*\*\*\*

\* Security Question: Enter successfactors

\* Security Answer: \*\*\*\*\*

\* Re-Enter Security Answer: \*\*\*\*\*

Apply Changes Reset

**Learning Notifications**

Notify me when an item is added to my To-Do List

Notify me when an item is modified in my To-Do List

Notify me when an item is removed from my To-Do List

Apply Changes Reset

**Select a Locale and Time Zone**

\* = Required Fields

\* Active Locale ID: English Select

\* Currency ID: USD (US Dollar)

\* Time Zone ID: Eastern Standard Time (America/New York)  Always display Schedule Offerings in this Time Zone

Region ID: Select

Apply Changes Reset

**Update the Locale Format Options**

\* = Required Fields

\* Date Pattern ID: MMM/d/yyyy(MMM/d/yyyy)

\* Time Pattern ID: hh:mm aaa(hh:mm AM/PM)

\* Integer Pattern ID: Long\_01(1000)

\* Decimal Pattern ID: Double\_01(1000)

\* Currency Pattern ID: Currency\_01(1000)

\* Percentage Pattern ID: Percentage\_01(1000)

Apply Changes Reset

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.

The screenshot shows the 'Options and Settings' page with a 'Help' link. Below the title is a description: 'Your settings determine the formats and standards used to display information to you in the application.' A section titled 'Update Account Security Information' contains a legend '\* = Required Fields'. The 'Password' field is highlighted with a red box and contains '\*\*\*\*\*'. Below it are three other fields: '\* Security Question:' with the placeholder 'Enter successfactors', '\* Security Answer:' with '\*\*\*\*\*', and '\* Re-Enter Security Answer:' with '\*\*\*\*\*'. At the bottom right are 'Apply Changes' and 'Reset' buttons.

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

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

The screenshot shows the 'Profile' page with a 'Help' link. It states 'The User's password has to be compliant with the following rules:' followed by a bulleted list: 'The length of the password must be between 1 and 40 characters.', 'The new password cannot be same as any of the previous 6 passwords.', and 'Password cannot be same as the E-Signature PIN.' Below this is a section titled 'Change Your Password' with three input fields: 'Enter your old password:', 'Enter your new password:', and 'Verify your new password:'. At the bottom right are 'Apply Changes' and 'Reset' buttons.

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.

**Options and Settings** [Help](#)

Your settings determine the formats and standards used to display information to you in the application.

#### Update Account Security Information

\* = Required Fields

Password: \*\*\*\*\*

\* Security Question: Enter successfactors

\* Security Answer: \*\*\*\*\*

\* Re-Enter Security Answer: \*\*\*\*\*

**Apply Changes** **Reset**

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.



The screenshot shows a settings panel titled "Learning Notifications" with a light blue header. Below the header are three unchecked checkboxes: "Notify me when an item is added to my To-Do List", "Notify me when an item is modified in my To-Do List", and "Notify me when an item is removed from my To-Do List". At the bottom right of the panel are two yellow buttons: "Apply Changes" and "Reset".

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.

The screenshot shows a settings panel titled "Select a Locale and Time Zone" with a light blue header. Below the header is a red asterisk and the text "Required Fields". There are four fields: "Active Locale ID" with a text input containing "English" and a "Select" link; "Currency ID" with a dropdown menu showing "US Dollar (USD)"; "Time Zone ID" with a dropdown menu showing "America/New York (Eastern Standard Time)"; and "Region ID" with a text input and a "Select" link. To the right of the "Time Zone ID" field is an unchecked checkbox labeled "Always display Schedule Offerings in this Time Zone". At the bottom right are two yellow buttons: "Apply Changes" and "Reset".

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.

**Update the Locale Format Options**

\* = Required Fields

- \* **Date Pattern ID:** MMM/d/yyyy(MMM/d/yyyy)
- \* **Time Pattern ID:** hh:mm aaa(hh:mm AM/PM)
- \* **Integer Pattern ID:** Long\_01(1000)
- \* **Decimal Pattern ID:** Double\_01(1000)
- \* **Currency Pattern ID:** Currency\_01(1000)
- \* **Percentage Pattern ID:** Percentage\_01(1000)

Apply Changes Reset

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.



The image shows a user login screen. At the top left, there is a blue speech bubble containing the word "Welcome!". To its right, the text "Please Sign In" is displayed. Below this, there are two input fields: "User ID:" and "Password:". A yellow "Sign In" button is positioned to the right of the password field. At the bottom of the form, there are three links: "Forgot Password?", "Forgot ID?", and "New User?". The "New User?" link is highlighted with a red rectangular border.

Figure 13. User Login Screen > New User? Link

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

The image shows a "Create New Account" form. At the top, the title "Create New Account" is displayed. Below the title, there is a paragraph of instructions: "Please complete the 'Create New Account' form and click 'Submit'. After you create an account, you can view your To-Do List, add items to your cart, and check out." Below this, there is a section for password rules: "The User's password has to be compliant with the following rules:" followed by a bullet point: "• The length of the password must be between 1 and 40 characters." Below the password rules, there is a section for "Required Fields." The form is divided into two main sections: "Account Information" and "Contact Information". The "Account Information" section includes fields for "User ID" (with a value of 23), "Password", "Re-Enter Password", "Security Question", "Security Answer", and "Re-Enter Security Answer". The "Contact Information" section includes fields for "First Name", "Last Name", "Middle Initial", "Email Address", "Telephone Number", "Main Address", "City", "State / Province", "Postal Code", and "Country" (with a dropdown menu). At the bottom right of the form, there are two buttons: "Submit" and "Reset".

Figure 14. Create New Account Screen



# NAVIGATION

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

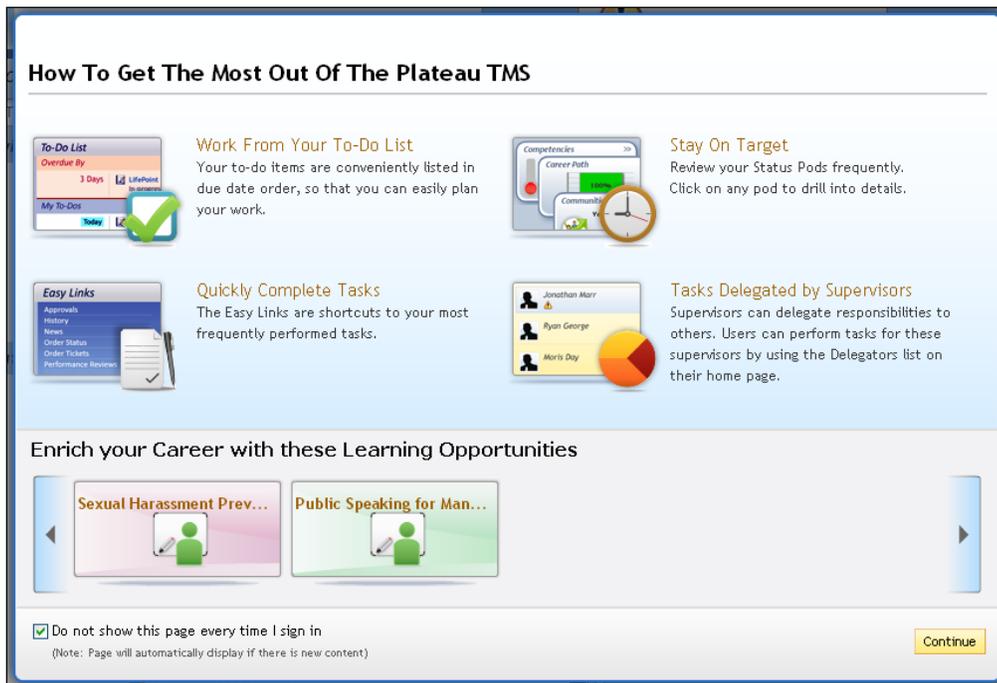


Figure 15. Getting Started Screen

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.

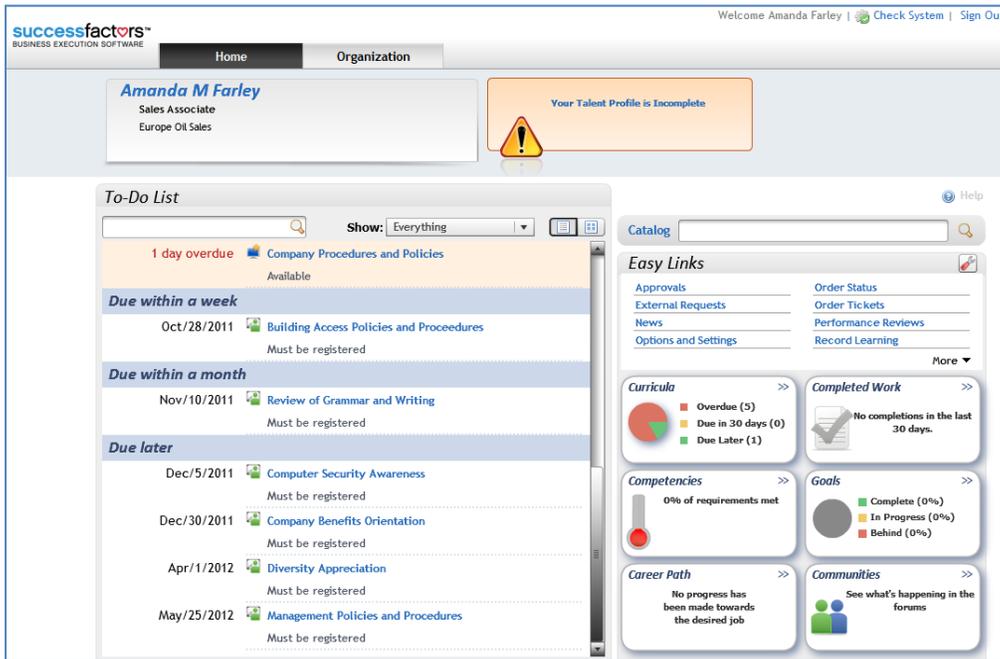


Figure 16. Home Page

## 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).

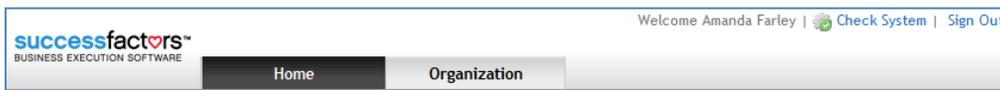


Figure 17. Top Menu Frame



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



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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.

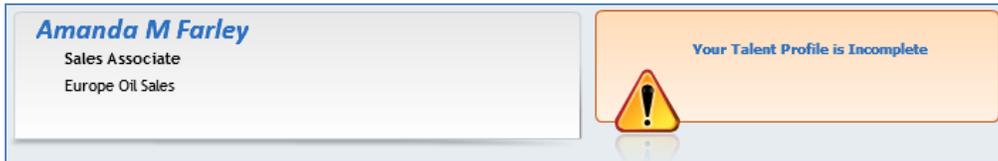


Figure 18. User Card and Alerts

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 Delegates 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.

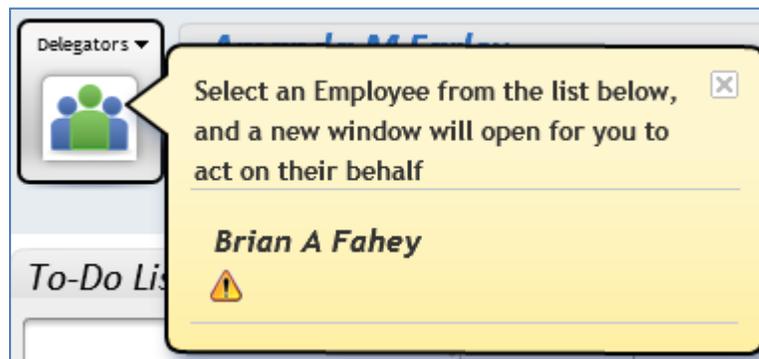


Figure 19. Delegators List



## 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.

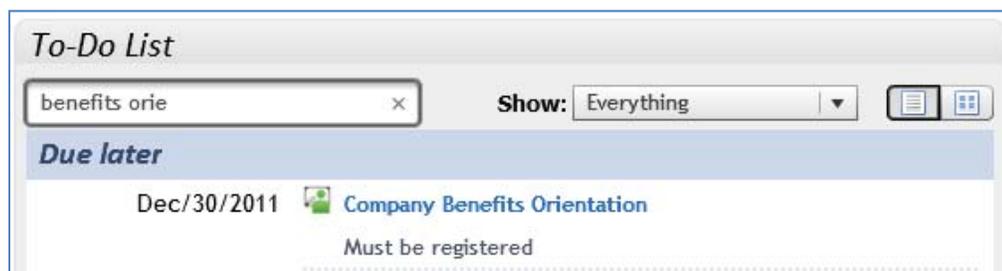


Figure 21. User To-Do List Filter



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.

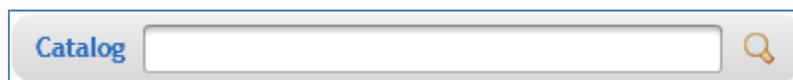


Figure 24. Catalog Search

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.

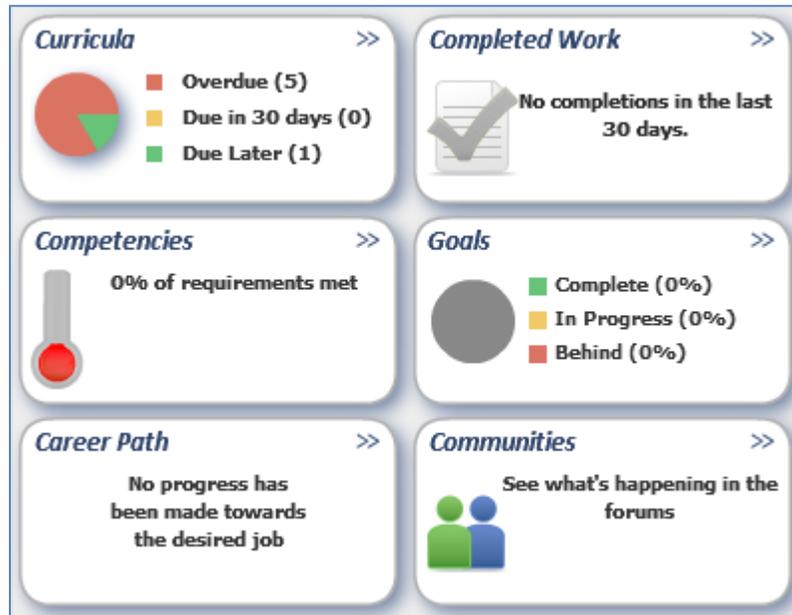


Figure 26. Easy Links



*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.

The screenshot shows a table titled "Completed Work" with a header row containing "Type", "Title", "Status", and "Completion Date \*". The "Type" and "Status" columns have dropdown menus, and the "Title" column has a search input field. A red box highlights these filter options. The table contains six rows of data, sorted by completion date in descending order. The "Completion Date" column has a sort icon (1▼) to its right. At the top right of the table area, there are links for "Competency History" and "Help", and a "Show Completions:" dropdown menu set to "All".

Type	Title	Status	Completion Date *
Review	EU-OIL-SALES	Published	Jan/5/2007 02:18 PM
Learning	Attend one training session per quarter		Jan/5/2007 10:12 AM
Learning	Attend customer service related training for sales		Jan/5/2007 10:03 AM
Assessment	Sales Entry Level Core Assessment 2007	Completed	Jan/4/2007 01:42 PM
Assessment	Self Assessment	Completed	Jan/4/2007 11:11 AM
Learning	New Employee Orientation	Passed Course	Dec/1/2003 01:21 PM

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.

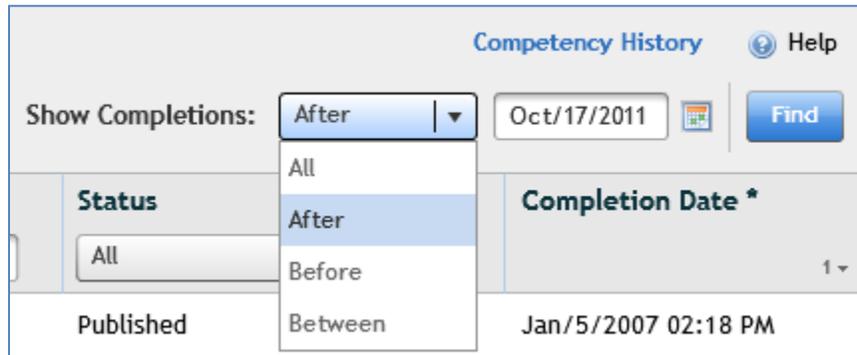


Figure 28. Show Completions

## 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.

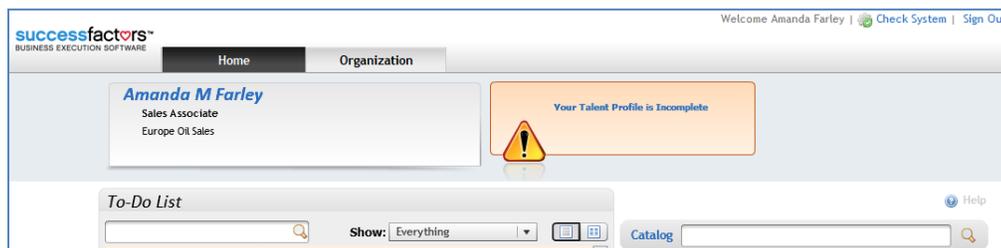


Figure 29. Home Page

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.

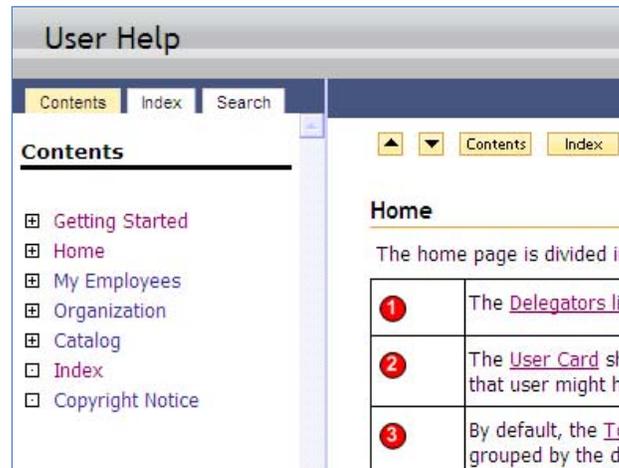


Figure 30. Online Help

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.

The screenshot displays the SuccessFactors Home Page for user Amanda M Farley. The page includes a navigation bar with 'Home' and 'Organization' tabs. A user profile box shows 'Amanda M Farley, Sales Associate, Europe Oil Sales'. A warning box indicates 'Your Talent Profile is Incomplete'. The main 'To-Do List' is categorized by due dates: '1 day overdue' (Company Procedures and Policies), 'Due within a week' (Building Access Policies and Procedures), 'Due within a month' (Review of Grammar and Writing), and 'Due later' (Computer Security Awareness, Company Benefits Orientation, Diversity Appreciation, Management Policies and Procedures). The right sidebar contains 'Easy Links', 'Curricula' (Overdue: 5, Due in 30 days: 0, Due Later: 1), 'Completed Work' (No completions in the last 30 days), 'Competencies' (0% of requirements met), 'Goals' (Complete: 0%, In Progress: 0%, Behind: 0%), 'Career Path' (No progress has been made towards the desired job), and 'Communities'.

Figure 31. Home Page

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



The screenshot shows a 'To-Do List' interface. At the top, there is a search bar and a 'Show: Everything' dropdown. Below this, a list of items is displayed, categorized by due date: '1 day overdue', 'Due within a week', 'Due within a month', and 'Due later'. A yellow popup window titled 'Building Access Policies and Procedures' is overlaid on the list. The popup contains the following information: 'Due by Oct/28/2011 | Required | Assigned by User Plateau', 'Originated From Curriculum', 'Document HR-001', a description of the document, a warning that the user is 'NOT REGISTERED' and there are 'NO SCHEDULED SESSIONS', and a 'Request Schedule' button. The popup also indicates '2 days remaining'.

Figure 32. Item Detail Information Card

Click the item title to display the item details screen.

The screenshot shows the 'Item Details' screen for 'Building Access Policies and Procedures'. The screen has a 'Back' link and a 'Help' icon. The main content is organized into sections: 'Item Summary', 'Assignment Information', and 'Subject Areas'. The 'Item Summary' section includes the document ID 'HR-001', a revision date, a description, and a 'Request Schedule' button. The 'Assignment Information' section includes the required date, completion details, days remaining, origin, assignment type, assignment date, and assigned by. The 'Subject Areas' section shows '1 Found'.

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
<b>Prerequisites not met</b> 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.	 <b>Request Schedule</b>  Indicates there are no available scheduled offerings.  <b>Register</b>  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.  <b>Remove</b>  If the item is not required or it was self-assigned, you can remove it from your To-Do List.
<b>Enrolled</b> SuccessFactors Learning reserved a seat for you in a scheduled offering.	 <b>view registration</b>  View registration details on the Registration page. If you self-registered, you can withdraw.
<b>On Waitlist</b> You are on a waitlist for a scheduled offering. If a user withdraws, SuccessFactors Learning automatically registers you into the scheduled offering.	 <b>view registration</b>  View registration details on the Registration page. If you self-registered, you can withdraw.



Status	Available Action
<b>Enrolled, In Session</b> You registered for a scheduled offering, and the class is currently in session.	 <b>view registration</b>  View registration details on the Registration page. If you self-registered, you can withdraw.
<b>Enrolled, Not in Session</b> 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.  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."	 <b>view registration</b>  View registration details on the Registration page. If you self-registered, you can withdraw.
<b>Not Available</b> The content is offline and unavailable.	 <b>Remove</b>  If the item is not required or it was self-assigned, you can remove it from your To-Do List.
<b>Must be Registered</b> Item requires registration. If item is blended, online content is unavailable until you enroll in a scheduled offering.	 <b>Register</b>  There are scheduled offerings available and you are not registered; takes you to the registration process.   <b>Remove</b>  If the item is not required or it was self-assigned, you can remove it from your To-Do List.   <b>Request Schedule</b>  Indicates there are no available scheduled offerings.   <b>Access Community</b>  Available if there is a community associated with the item or scheduled offering
<b>Locked Out</b> SuccessFactors Learning or an administrator locked the item.	 <b>Remove</b>  If the item is not required or it was self-assigned, you can remove it from your To-Do List.



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

To assign items to your To-Do List:

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

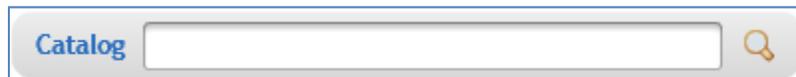


Figure 35. Catalog Search



*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.

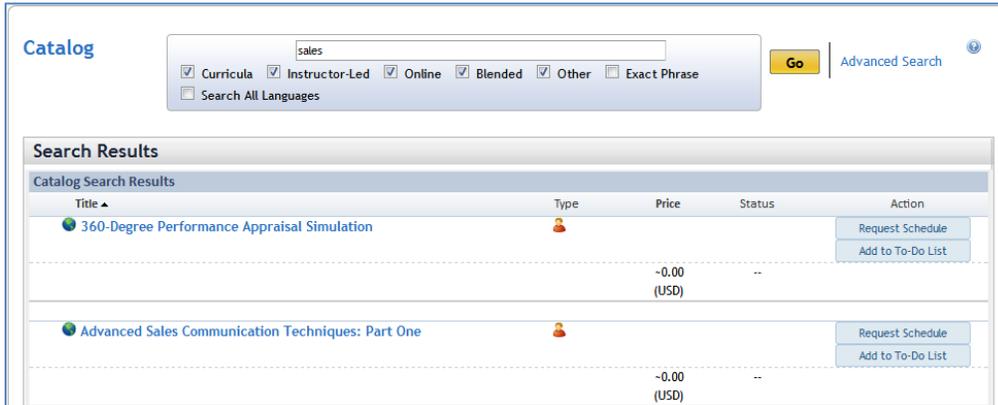


Figure 36. Catalog Search Results

## 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.

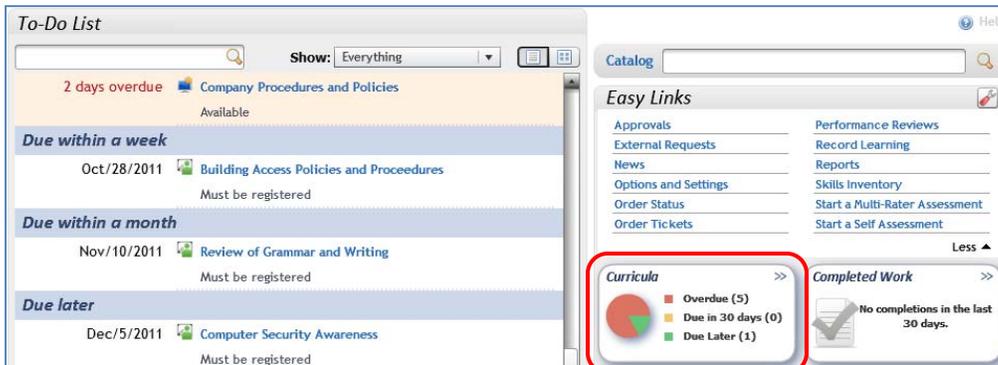


Figure 37. Home Page: Curricula Easy Link



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

**Sort**  
Click to sort by *Curriculum Title*, *Next Action Date*, or *Expiration Date* (the arrow indicates ascending/descending order).

**Curriculum Status** Help

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

Curriculum Title	Next Action Date	Expiration Date	Assigned By	Remove
<input type="checkbox"/> General Employee Orientation	Jan/28/2011	N/A	Admin (User Plateau)	
<input type="checkbox"/> New Employee Orientation	Mar/27/2011	N/A	Admin (User Plateau)	
<input type="checkbox"/> Software Tools (all employees)	Aug/25/2011	N/A	Admin (User Plateau)	
<input type="checkbox"/> Business Communication	Oct/10/2011	N/A	Admin (User Plateau)	
<input type="checkbox"/> Building Access and Emergency Preparedness	Oct/29/2011	N/A	User (Amanda M Farley)	
<input type="checkbox"/> IT Basics	May/1/2012	May/1/2012	Admin (User Plateau)	
<input type="checkbox"/> HR Policies and Procedures	May/15/2012	N/A	Admin (User Plateau)	

**View Items in the Curriculum**  
Click the *Title* to display a list of the items that are members of the curriculum, their required dates, and their completion statuses. These are the same items listed on your To-Do List.

**Curriculum Completion Status**  
Each folder represents a curriculum. A green checkmark over the folder indicated a completed curriculum.

**View Sub Curricula**  
Sub curricula are curricula assigned to parent curricula. Click to expand and view the sub curricula.

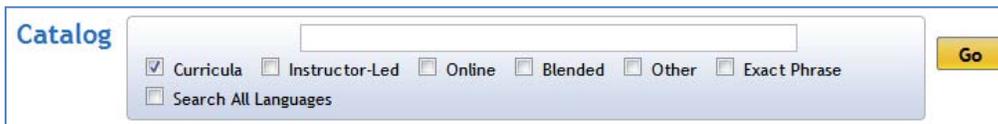
Figure 38. Curriculum Status Screen



## Assigning Curricula to Your To-Do List

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

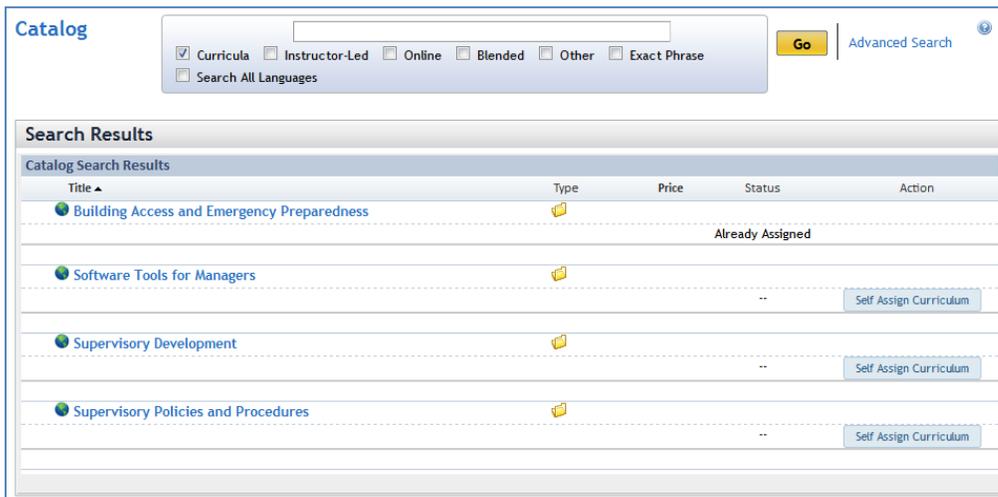
1. Click the **Catalog** link on the Home page.
2. Enter keywords in the simple catalog search area to filter the catalog search.



The image shows a search form titled "Catalog". It features a search input field, a "Go" button, and several checkboxes: "Curricula" (checked), "Instructor-Led", "Online", "Blended", "Other", "Exact Phrase", and "Search All Languages".

Figure 39. Simple Catalog Search

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



The image shows the search results page. It includes the same search form as Figure 39, but with a "Go" button highlighted in yellow. Below the form is a table titled "Search Results" with columns for Title, Type, Price, Status, and Action.

Title	Type	Price	Status	Action
Building Access and Emergency Preparedness	📁		Already Assigned	
Software Tools for Managers	📁		--	Self Assign Curriculum
Supervisory Development	📁		--	Self Assign Curriculum
Supervisory Policies and Procedures	📁		--	Self Assign Curriculum

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.

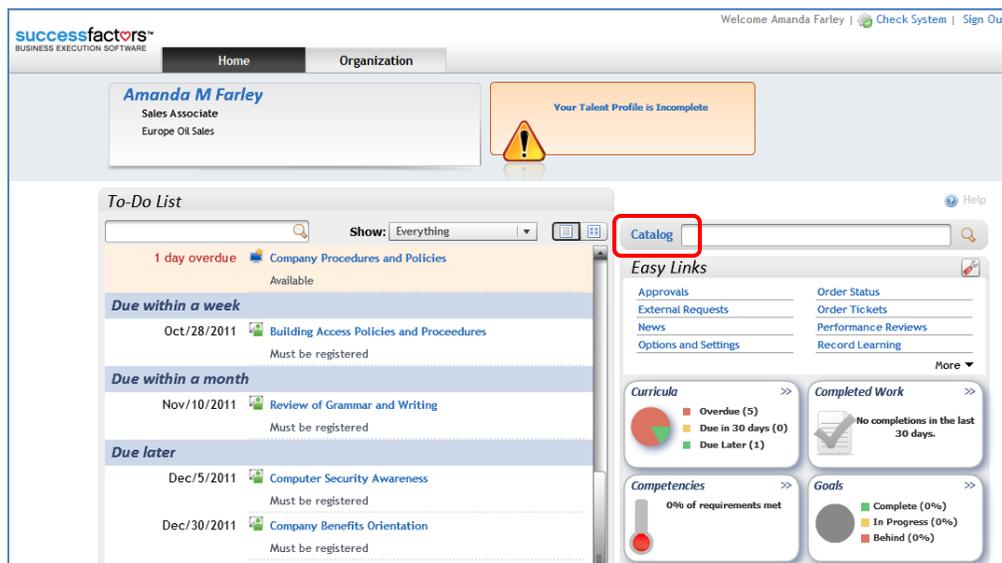


Figure 41. Catalog Sub-Menu

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.

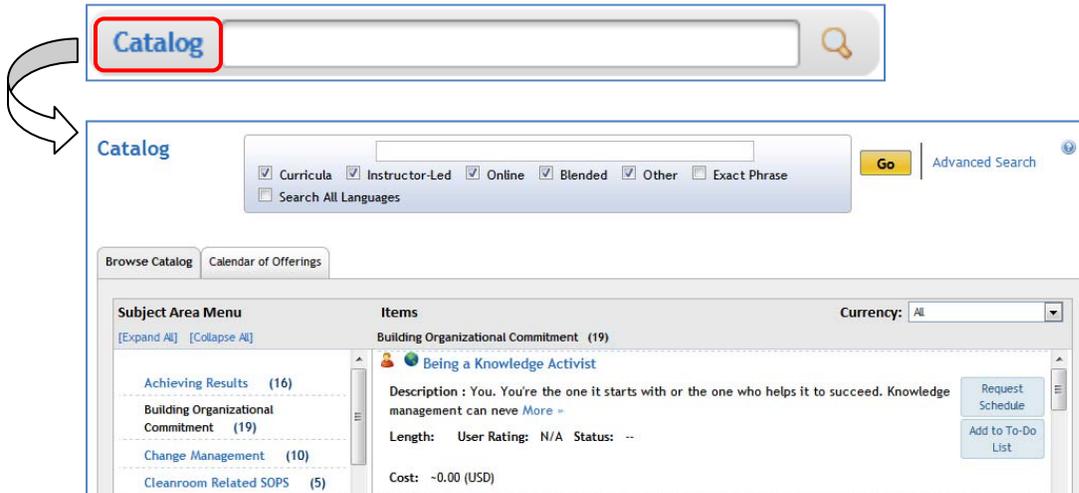


Figure 42. Browse Catalog Screen

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.)*

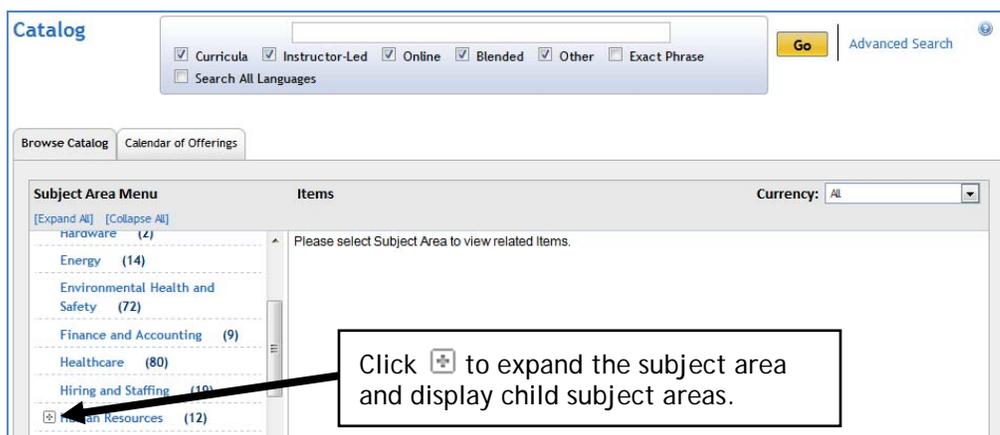


Figure 43. Browse Catalog



*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 <u>only</u> 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	<u>Exact</u> text entered in the <i>Keywords</i> 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.

The screenshot shows the 'Advanced Catalog Search' interface. At the top, there is a search bar and a 'Go' button. Below the search bar are several checkboxes:  Curricula,  Instructor-Led,  Online,  Blended,  Other,  Exact Phrase, and  Search All Languages. The main search area is titled 'Advanced Catalog Search' and contains a 'Keywords' sidebar on the left. The sidebar has radio buttons for 'All', 'Only Items', 'Curricula', and 'Only Offerings'. The main area has dropdown menus for 'Title', 'Description', 'ID', 'Subject Area', 'Delivery Method', and 'Source', each with a 'Select' link. A 'Search' button is at the bottom right.

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.

**Advanced Catalog Search**

Keywords

- All
- Only Items
- Curricula
- Only Offerings

Title:  Contains

Description:  Contains

ID:  Contains

Subject Area:  Contains

Delivery Method:  Contains

Source:  Contains

Facility:  Contains

From:    
(MMM/d/yyyy)

To:    
(MMM/d/yyyy)

Show Only Offerings in my Region

Search All Languages (Applies to Title, Description, and Subject Area)

Check:

- **Show Only Offerings in my Region** if you wish to view only available offerings within your region.
- **Search all Languages** for the LMS to return results from any locale. To limit the search results to your preferred locale only, clear this checkbox.

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.

Below are the results of your search of the Calendar of Offerings. You can view the Calendar in a Monthly or Weekly view.

Month Week Day    << < Month of: November 2011 > >>    Calendar Search    Calendar Options

Monday	Tuesday	Wednesday	Thursday	Friday
31	1	2	3	4
			10	11
			17	18
Oracle Database Server (1 Offering) 21		Energy (1 Offering) 23		

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.

Below are the results of your search of the Calendar of Offerings. You can view the Calendar in a Monthly or Weekly view.

Subject Area: All Subject Areas

Month Week Day    << Offerings on Monday, November 21, 2011 >>    Calendar Search    Calendar Options

Subject Area	Title	Delivery Method	Facility	Description	Start Time	Duration	Action
Oracle Database Server	Oracle 8i Installation	Instructor Led	Regional Training Center	<a href="#">Oracle 8i Installation</a>	Nov/21/2011 08:00 AM America/New York	9.00 hours	Register

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.

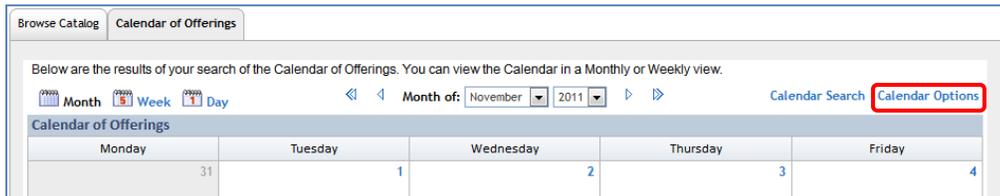


Figure 49. Calendar of Offerings Display Options

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).

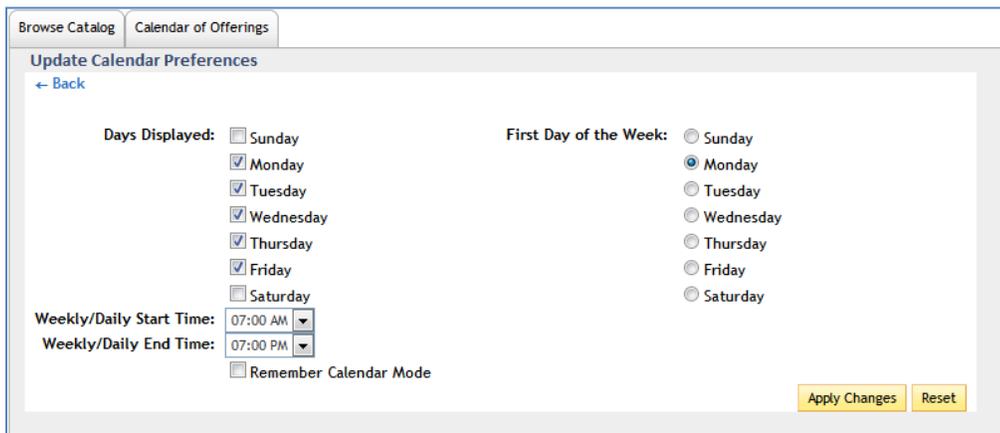


Figure 50. Update Calendar Preferences

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



## Monthly View

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

Select the month and year using the drop-down boxes or arrows.

Click **Calendar Options** to set calendar display preferences.

Monday	Tuesday	Wednesday	Thursday	Friday
31	1	2	3	4
7 Healthcare (1 Offering)	8	9	10	11
14 Oracle Database Server (1 Offering)	15	16	17	18
21	22	23 Energy (1 Offering)	24	25

Click a date to display the day view of the calendar.

Click the segment title to view segment details.

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.

Select the week using the arrows.

Click **Calendar Options** to set calendar display preferences.

Monday, Nov 21	Tuesday, Nov 22	Wednesday, Nov 23	Thursday, Nov 24	Friday, Nov 25
Oracle Database Server (1 Offering)		Energy (1 Offering)		

Click the title to view segment details.

Click a date to display the day view of the calendar.

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.

Select the day using the arrows.

Click Calendar Options to set calendar display preferences.

Subject Area	Title	Delivery Method	Facility	Description	Start Time	Duration	Action
Oracle Database Server	Oracle 8i Installation	Instructor Led	Regional Training Center	Oracle 8i Installation	Nov/21/2011 08:00 AM America/New York	9.00 hours	Register

Select to show all subject areas or specific subject areas to filter the list of offerings.

Click the description to view summary information and segment details.

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.

The screenshot shows a 'To-Do List' window with a search bar and a 'Show: Everything' dropdown. The list is categorized by due dates:

- 17 days overdue:** Public Speaking for Managers (Must be registered)
- Due within a week:** Oct/28/2011 Building Access Policies and Procedures (Must be registered)
- Due within a month:** Nov/10/2011 Review of Grammar and Writing (Must be registered)
- Due later:** Dec/30/2011 Company Benefits Orientation (Enrolled), May/1/2012 Computer Security Awareness (Must be registered)

Figure 54. To-Do List



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

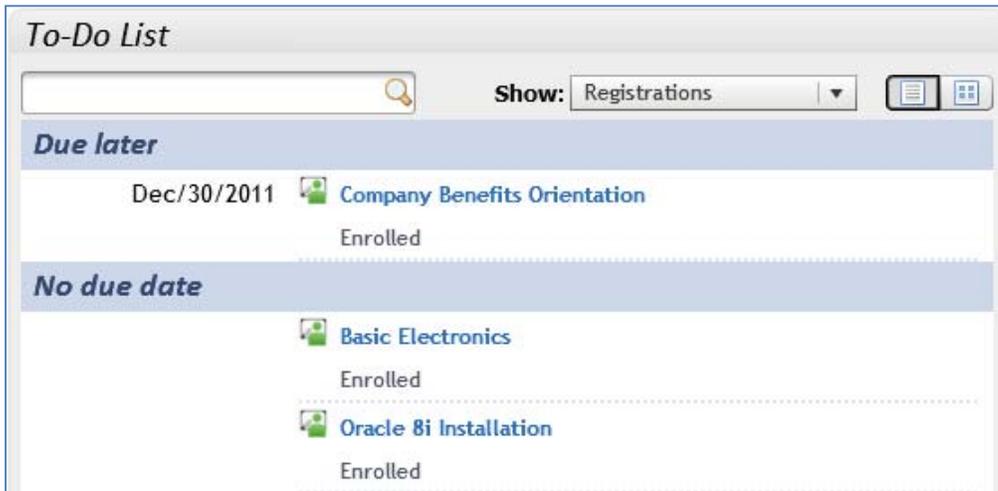


Figure 55. To-Do List: Registrations Only



*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.*



**Registration** Help

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**Company Benefits Orientation**

COURSE HR-101

Revision: 1 - May/14/2003 12:00 AM America/New York

**Item Description:** Learn the techniques needed to perform tasks relevant to your position. This course covers the essential information you must have in order to complete your objectives. Learning is a holistic process that enriches and empowers an organization's entire value chain, including employees, customers, partners and stakeholders. The best way to achieve this is to tie learning objectives with business objectives across the enterprise.

**Assignment Information**

Required Date: Dec/30/2011      Completion Date:      Days Remaining: 64  
Assignment Type: REQ (Required)      Assignment Date: Jan/26/2011      Assigned By: PLATEAU,Plateau, User

**Current Registration**

**Available Offerings**

Day(s)	Start	End	Location	Available Seats	Price	Action
1	Jan/25/2012 08:00 AM America/New York	Jan/25/2012 05:00 PM America/New York	New York Office - New York Lecture Hall 02	25	0.00 (USD)	<a href="#">View Details</a> <a href="#">Register</a>
1	Apr/25/2012 08:00 AM America/New York	Apr/25/2012 05:00 PM America/New York	New York Office - New York Lecture Hall 02	25	0.00 (USD)	<a href="#">View Details</a> <a href="#">Register</a>

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.



**Item Details** Help

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**Company Benefits Orientation**

**Item Summary**

Course HR-101 [View Offerings](#)

**Revision:** 1 - May/14/2003 12:00 AM America/New York

**Description:** Learn the techniques needed to perform tasks relevant to your position. This course covers the essential information you must have in order to complete your objectives. Learning is a holistic process that enriches and empowers an organization's entire value chain, including employees, customers, partners and stakeholders. The best way to achieve this is to tie learning objectives with business objectives across the enterprise.

**Length:** 8.00      **Source:** Internal      **Contact:** William Lumberg (888) 555-1247  
**CPEs:** 3.00      **Credit Hours:** 8.00      **Contact Hours:**  
**Delivery Method:** Instructor Led      **Audience:** All Learners

**Goals:**

**Assignment Information**

**Required Date:** Dec/30/2011      **Assignment Type:** Required  
**Completion Details:**      **Assignment Date:** Jan/26/2011  
**Days Remaining:** 64      **Assigned By:** Admin (User Plateau)  
**Origin:** Curriculum

[▶ Subject Areas \(1 Found\)](#)

[▶ Prerequisites \(0 Found\)](#)

[▶ Substitutes \(0 Found\)](#)

[▶ Competencies \(1 Found\)](#)

Figure 58. Item Details Screen

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

**Registration** Help

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**Company Benefits Orientation**

COURSE HR-101

**Revision:** 1 - May/14/2003 12:00 AM America/New York

**Item Description:** Learn the techniques needed to perform tasks relevant to your position. This course covers the essential information you must have in order to complete your objectives. Learning is a holistic process that enriches and empowers an organization's entire value chain, including employees, customers, partners and stakeholders. The best way to achieve this is to tie learning objectives with business objectives across the enterprise.

**Assignment Information**

**Required Date:** Dec/30/2011      **Completion Date:**      **Days Remaining:** 64  
**Assignment Type:** REQ (Required)      **Assignment Date:** Jan/26/2011      **Assigned By:** PLATEAU,Plateau, User

[▶ Current Registration](#)

**Available Offerings**

Day(s)	Start	End	Location	Available Seats	Price	Action
1	Jan/25/2012 08:00 AM America/New York	Jan/25/2012 05:00 PM America/New York	New York Office - New York Lecture Hall 02	25	0.00 (USD)	<a href="#">View Details</a> <a href="#">Register</a>
1	Apr/25/2012 08:00 AM America/New York	Apr/25/2012 05:00 PM America/New York	New York Office - New York Lecture Hall 02	25	0.00 (USD)	<a href="#">View Details</a> <a href="#">Register</a>

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.



**Registration** Help

Lastly, enter any comments that you wish to be associated with your request and/or registration.

[Previous](#) [Confirm](#)

---

**Offering**

Excelling at Customer Service Simulation  
COURSE CUST0100  
Revision: 1.5 - Dec/23/2004 02:38 PM America/New York  
Start Date: Dec/21/2011 08:00 AM America/New York  
End Date: Dec/21/2011 02:00 PM America/New York  
Capacity: 0 of 25 enrolled, 0 waitlisted  
Price : 0.00 (USD)

---

**Registration Comments**

User Name: Farley, Amanda M  
Registration Status: ENROLL (Enrolled)

Comments:

[Previous](#) [Confirm](#)

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*

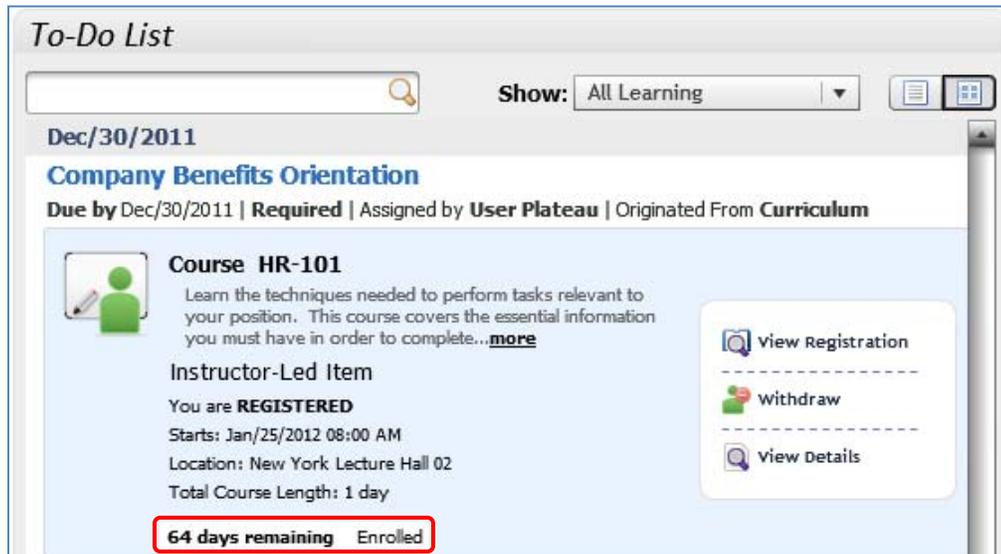
The To-Do List displays your registration status below the item title.



Figure 62. To-Do List



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



**To-Do List**

Search:  Show: All Learning  

**Dec/30/2011**

**Company Benefits Orientation**  
Due by Dec/30/2011 | Required | Assigned by User Plateau | Originated From Curriculum

 **Course HR-101**  
Learn the techniques needed to perform tasks relevant to your position. This course covers the essential information you must have in order to complete...[more](#)

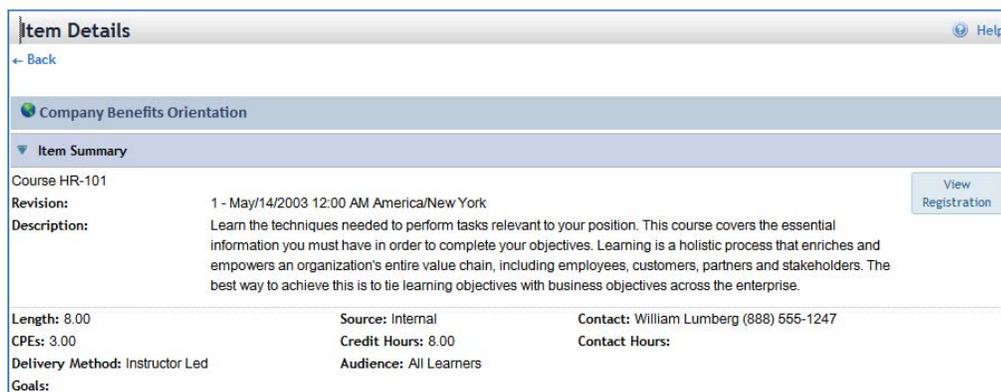
**Instructor-Led Item**  
You are **REGISTERED**  
Starts: Jan/25/2012 08:00 AM  
Location: New York Lecture Hall 02  
Total Course Length: 1 day

**64 days remaining** Enrolled

[View Registration](#)  
-----  
[Withdraw](#)  
-----  
[View Details](#)

Figure 63. To-Do List: Card View

Click View Details to display the Item Details screen.



**Item Details** [Help](#)

[Back](#)

**Company Benefits Orientation**

**Item Summary**

Course HR-101 [View Registration](#)

Revision: 1 - May/14/2003 12:00 AM America/New York

Description: Learn the techniques needed to perform tasks relevant to your position. This course covers the essential information you must have in order to complete your objectives. Learning is a holistic process that enriches and empowers an organization's entire value chain, including employees, customers, partners and stakeholders. The best way to achieve this is to tie learning objectives with business objectives across the enterprise.

Length: 8.00	Source: Internal	Contact: William Lumberg (888) 555-1247
CPEs: 3.00	Credit Hours: 8.00	Contact Hours:
Delivery Method: Instructor Led	Audience: All Learners	
Goals:		

Figure 64. Item Details Screen



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

**Registration** Help

[← Back](#)  
**Company Benefits Orientation**  
COURSE HR-101  
Revision: 1 - May/14/2003 12:00 AM America/New York  
Item Description: Learn the techniques needed to perform tasks relevant to your position. This course covers the essential information you must have in order to complete your objectives. Learning is a holistic process that enriches and empowers an organization's entire value chain, including employees, customers, partners and stakeholders. The best way to achieve this is to tie learning objectives with business objectives across the enterprise.

**Assignment Information**

Required Date: Dec/30/2011	Completion Date:	Days Remaining: 64
Assignment Type: REQ (Required)	Assignment Date: Jan/26/2011	Assigned By: PLATEAU,Plateau, User

**Current Registration**

Day(s)	Start	End	Location	Status	Action
1	Jan/25/2012 08:00 AM America/New York	Jan/25/2012 05:00 PM America/New York	New York Office - New York Lecture Hall 02	Enrolled	<a href="#">View Details</a> <a href="#">Withdraw</a>

**Available Offerings**

**Request Schedule**

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.

**To-Do List**

Search:  🔍 **Show:** Registrations ▼ 📄 📅

**Due later**

Dec/30/2011 **Company Benefits Orientation**  
Enrolled

**No due date**

**Basic Electronics**  
Enrolled

**Excelling at Customer Service Simulation**  
Enrolled

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 ().



**Contact Information**

**Theresa A D'Amico**  
Sales Associate - North America Steel Sales  
Washington DC

509 7th St NW  
Washington, DC 20004  
[Map](#)

Figure 68. Talent Profile: Edit Contact Information

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

**Edit Contact Information**

\* Required Field(s)

\* User First Name Michael  
\* User Middle Initial L  
\* User Last Name Hagan  
\* Email Address  
\* Address-Street 7000 Arundel Mills Cir  
\* Address-City Hanover  
\* Address-State/Province Maryland  
\* Address-Postal Code 21076  
\* Address-Country United States

Save Cancel

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.

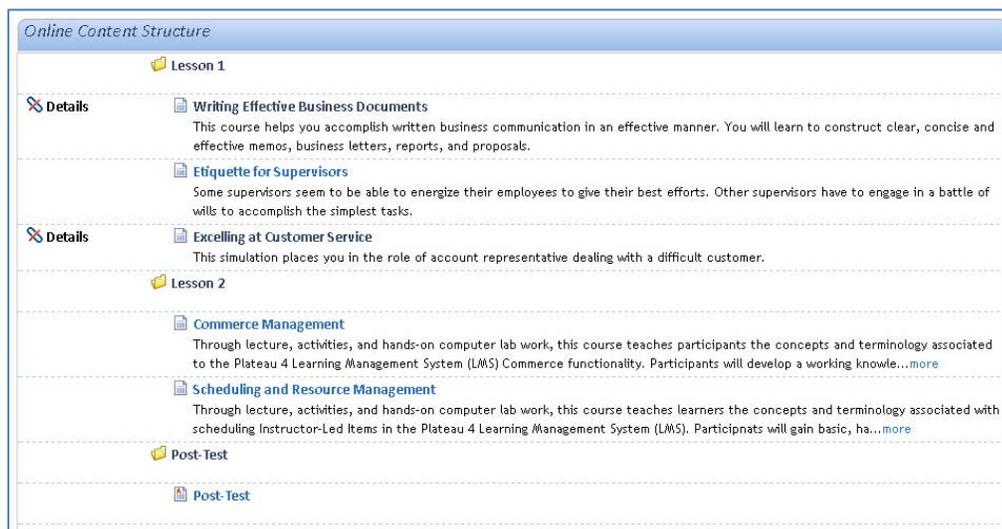


Figure 70. Online Content Structure Screen



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.

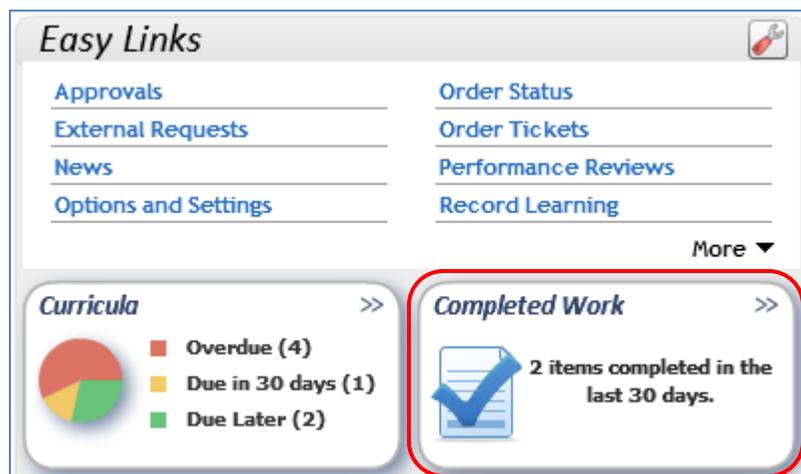


Figure 71. Completed Work Status Pod



Click the item title to view a complete description of the item (including hours, instructor, grade, and comments).

**Status**  
The status assigned to your learning event.

Use filters to modify the Completed Work list view.

Lists item completion date and time.

Type	Title	Status	Completion Date *
Learning	<a href="#">Microsoft Word 2003: Foundations</a>	Passed Course	Sep/16/2011 05:00 PM
Learning	<a href="#">Excelling at Customer Service Simulation</a>	Passed Course	Sep/5/2011 05:00 PM
Learning	<a href="#">Writing Effective Business Documents</a>	Online Course Passed	Sep/2/2011 05:00 PM
Learning	<a href="#">Overview &amp; Orientation</a>	Completed	May/19/2011 04:00 PM
Learning	<a href="#">New Employee Orientation</a>	Collateral Credit	Feb/8/2011 05:00 PM
Review	<a href="#">EU-OIL-SALES</a>	Published	Jan/5/2007 02:18 PM

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.

Show Completions: After [v] Oct/27/2011 [calendar icon] Find

Status: All

Completion Date \*: 1 [v]

Attended Event or Between Oct/25/2011 05:00 PM

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).



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.

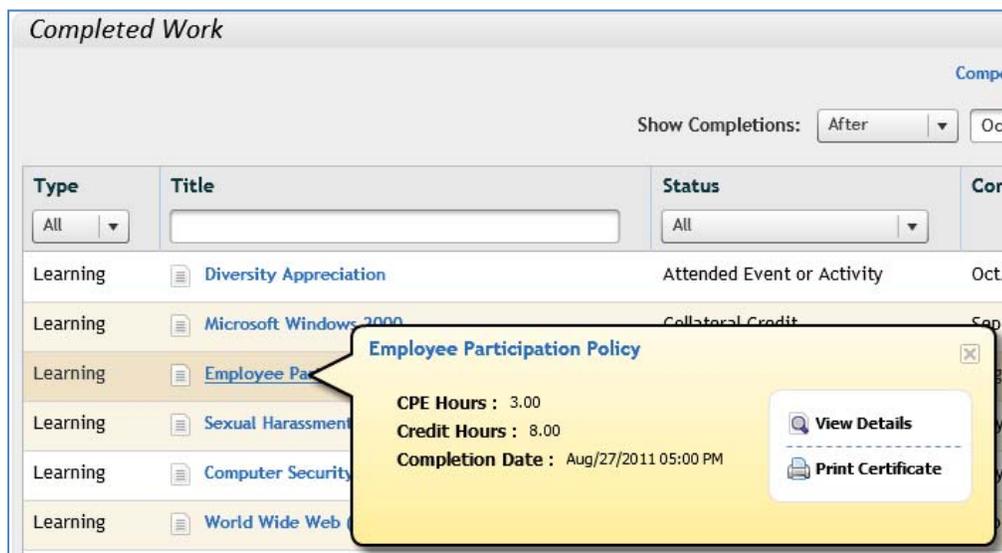


Figure 75. Completed Work Item Card

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.

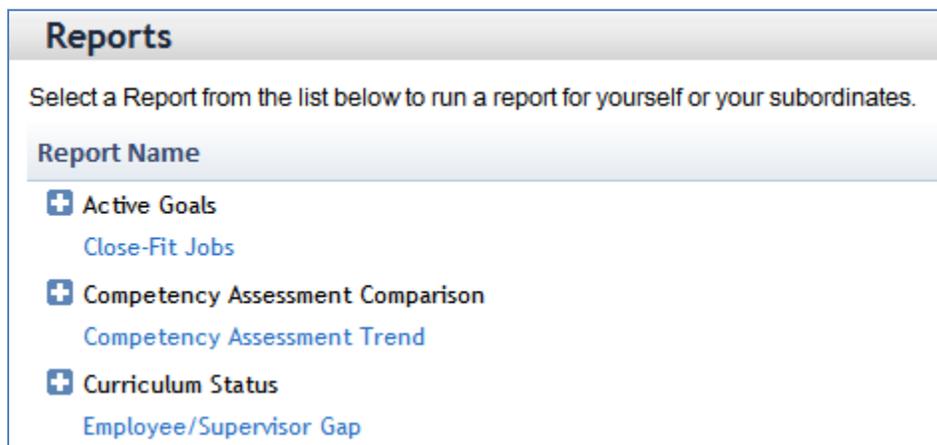


Figure 77. Available Reports

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.

**Reports** [Help](#)

[← Back to Browse Reports](#)

### Run Learning History

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Mask User IDs

Page Break Between Records

Completed Date From:  (MMM/d/yyyy)

Completed Date To:  (MMM/d/yyyy)

Report Type:  Summary  Detail

Include:  Item Events  External Events  Both

Print Comments:  Yes  No

Sort Items:  Completion Date  Item ID

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

**Reports**

← Back to Browse Reports

Run Learning History

Report Title: Learning History

Report Header:

Report Footer:

Report Destination: Browser

Report Format: HTML

Mask User IDs

Page Break Between Records

Completed Date From:  (MMM/d/yyyy)

Completed Date To:  (MMM/d/yyyy)

Report Type:  Summary  Detail

Include:  Item Events  External Events  Both

Print Comments:  Yes  No

Sort Items:  Completion Date  Item ID

Run Report Reset

**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.

