



Angela D. Alsobrooks
County Executive

SuccessFactors: Employee Introduction

Welcome to the **Employee Introduction Quick Reference Guide**.

Learning management allows your company to create courses and curriculum based on performance goals, career and succession plans, organizational development, and for individual, personal development. Learning creates career pathways for development and growth.

LMS GUIDE FOR EMPLOYEES

Quick Reference Guide

EMPLOYEE INTRODUCTION

Access SuccessFactors Learning to complete assigned courses. Here you can self assign Courses (Items) and Curricula, register for Instructor Led Training, view Learning History, record completion for External Events and run reports on completed Courses and assignments. Learning allows your manager and HR to create and assign Courses and Curriculum based on job requirements, compliance tracking and development objectives.

1 Getting Started

Select **Learning** from the drop-down menu to view your learning assignments and learning resources.

2 My Learning Page

My Learning creates an end user learning management experience for employees and managers controlled by the SuccessFactors Learning administration.

3 Learning Tiles

The **My Learning** page is comprised of configurable tiles, which you can drag and drop to create your own personalized view.

4 My Learning Assignments

The **My Learning Assignments** tile displays your assigned learning activities. You can view your assignments and related details, launch training, register for offerings, complete surveys, and much more.

5 My Team (for Managers)

Displays a pie-chart status of all your subordinates' assignments.

NOTE: Managers and learning administrators may have access to additional tiles containing more resources and information for your learning organization.

The screenshot displays the SuccessFactors Learning user interface for user Carla Grant. The interface is organized into several sections:

- Navigation:** A top navigation bar includes a 'Learning' dropdown menu (labeled 1), the user name 'Carla Grant (cgrant)', and search options.
- My Learning Page:** A central header area (labeled 2) for the user's learning management.
- My Learning Assignments:** A large tile (labeled 4) showing a list of assignments. The 'OVERDUE' section includes:
 - 'Building Access Policies and Procedures' (DOC HR-001 rev. 1.2 8/11/2004) - 4 DAYS OVERDUE | REQUIRED
 - 'Emergency Evacuation Procedures' (OJT HR-003 rev. 1.2 8/11/2004) - 4 DAYS OVERDUE | REQUIRED, with a 'YOU HAVE UNMET PREREQ...' note.
 - 'Emergency Preparedness' (DOC HR-002 rev. 1.2 8/11/2004) - 4 DAYS OVERDUE | REQUIRED.
 The 'DUE WITHIN A WEEK' section includes a 'SuccessFactors Global University Feedback Survey' (3/17/2014) with a 'CONTINUE SURVEY' button.
- Find Learning:** A search box (labeled 3) with the text 'What do you want to LEARN today?' and a 'Go' button, along with a 'Browse all courses >' link.
- My Curricula:** A tile featuring a pie chart (labeled 5) showing the status of assignments: 1 Overdue and 2 Due in 30 days.
- Learning History:** A section with 'View all' and 'Add' buttons, and a 'MOST RECENTLY ADDED' list showing 'Privacy 101' with a green checkmark.
- Links:** A sidebar on the right contains various navigation links such as 'Approvals', 'Customer Community', 'External Requests', 'My Orders', 'News', 'Options and Settings', 'Performance Reviews', 'Record Learning', 'Reports', 'Skills Inventory', 'Start a Multi-Rater...', 'Start a Self Assess...', and 'Training Planner'.

Learn MORE: What is an LMS?

A Learning Management System (LMS) allows your organization to deploy a comprehensive learning strategy that includes Instructor Led Training (ILT), eLearning, Virtual Learning, Exams, Certificates, and extended learning. With an LMS system, your organization can create courses and curriculum based on performance, development and compliance objectives for your organization, and for your individual, personal development. Key Terms used with Learning include:

Curriculum	A set of one or more items that can be assigned and tracked as a group. Items can be grouped together in order to track them as a single entity.	Learning History	Items recorded for the employee. Completion status provides details to indicate whether you received credit or not. Recording learning records any completed training in your learning history.
Item	The smallest assignable unit. An item can have one of four system driven classifications. An item can be instructor-led, online, blended, or can also be classified as other.	Learning Plan	List of items and related activities (such as surveys) that are currently assigned to you.
Completed Work	Items recorded for the employee. Completion status provides details to indicate whether the employee received credit or not.	Registration/ Enrollment	Associating an employee with a scheduled offering. Employee status can be enrolled, waitlisted, cancelled, or pending (waiting approval).
		Scheduled Offerings	Registering for a scheduled offering takes a spot and a seat in that course on that date on that time with the instructor that you want at a specific location.

ACTION STEPS: LEARNING TILES

My Learning Assignments

The **My Learning Assignments** tile displays items assigned to you and includes call-to-action buttons/statuses for each entry, with configurable data fields and displays start/end dates for enrollments.

- 1 Courses are organized by time, e.g., overdue, due within a week, due within a month, due later, and no due date (for items that are self-assigned or have no required due date).
- 2 Select **Filter** to display a row of fields. **NOTE:** The filter searches the title only for each type of entry.
- 3 Each learning activity is listed with a call-to-action button and status update. You can show/hide information, view the course start date and location for enrollment, and display curriculum requirements.
- 4 Select the down arrow to view additional details about a course.
- 5 Select a title to view the complete details of the course or learning activity to review information about the course, your registration, and any course requirements.
- 6 Click the **More** link to view additional information about the activity, including its description, type, length, credit, contact, and CPEs.

Find Learning Tile

Search for learning activities in the catalog.

- 1 Enter keywords in the text box to perform a quick search for related items in the catalog.
- 2 Click **Browse All Courses** to navigate to the Learning Catalog which lists featured and recommended courses.

Find Learning

What do you want to LEARN today

[Browse all courses >](#) 2

Learning History Tile

Learning History displays events recorded in the last 30 days

- 3 Click VIEW ALL to view your completed work
- 4 New Events can also be added to your history on this tile by clicking Add
- 5 This tile lists recently added and completed work. Select a title (in this case, ART Microsoft Excel) to view more details

Learning History

★

3 4

MOST RECENTLY ADDED

ART Microsoft Excel 5

My Curricula Tile

Displays a pie-chart status of items within assigned curricula.

- 6 Click **My Curricula** to view curricula and their member items under the Curriculum Status page. This status page also displays your completion status of the assigned curricula.

My Curricula 6



Learning Links

Links access some of the most commonly used functions. Links are designed to access areas of the SuccessFactors Learning easily and quickly.

- **Approvals:** Review and approval actions you have been asked to perform.
- **External Requests:** Request, authorization, agreement & certification of training for events outside of Learning.
- **Options and Settings:** Update your learning preferences. Settings determine the formats and standards used to display information to you in the application.
- **Record Learning:** Record a learning event for yourself or for one of your subordinates.
- **Reports:** Report on compliance and audit history by the employee.
- Employee may only access his/her own learning records.
- **Skills Inventory:** Identify additional work-related skills or abilities that you possess. Your skills inventory is used to provide a more complete picture of your abilities to your supervisor and to talent/organizational planners within your organization.
- **Training Planner:** You and your manager may submit training requests, which are reviewed by a designated Training Manager in the Training Planner.

STEP BY STEP: COURSE INFORMATION

Learning - Carla Grant (cgrant) successfactors™ An SAP Company

My Learning My Team

Registration

- 1 **AJW Delivering the Advanced LMS Demo**
COURSE AJW-ADMIN
Revision: 1 - 12/9/2013 09:31 CST
Item Description: This is 5 day training course that will teach you a lot about the LMS.
- 2 **Assignment Information**
Required Date: Assignment Type: REQ
Completion Date: Assignment Date: 8/26/2014
Days Remaining: Assigned By: admin2,Admin, Test
- 3 **Current Registration**

Day(s)	Start	End	Location	Status	Action
5	9/8/2014 0900 Europe/London	9/12/2014 1300 Europe/London	Edinburgh Facility - Edinburgh Classroom 01	Enrolled	View Details
- 4 **Available Offerings**
- 5 **Request Schedule**

Course Registration

Click a course's **View Registration** or **Request Schedule** links to go to the **Registration** page. Here you can review details related to the registration.

- 1 The course name and description are listed.
- 2 **Assignment Information** lists prerequisite assignments for the course and the required completion dates.
- 3 **Current Registration** displays the dates, location, and status of the course for which you have registered. Click **View Details** to see additional information about the course.
- 4 **Available Offerings** display the current course schedule.
- 5 **Request Schedule** allows you to request the course schedule, if this information is not listed.

Learning - Carla Grant (cgrant) successfactors™ An SAP Company

My Learning My Team

AJW Delivering the Advanced LMS Demo

This is 5 day training course that will teach you a lot about the LMS.

- 1 **40 HRS LENGTH** **40 HRS CREDIT**
- 2 **40 HRS LENGTH** **40 HRS CREDIT**
- 3 **SUBJECT AREAS** Associate
SOURCE Internal
- 4 **Enrolled** You may also: [View Registration >](#) On your learning plan [No due date >](#)

Course Details

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

- 1 Basic information about the course is displayed:
 - Type of course (online, instructor led, etc.)
 - Target audience (employees, managers etc.)
 - Contact information for additional details related to the course.
- 2 The course description and goals are listed along with the time commitment and CPEs:
 - Length of the course in hours
 - Credits for course listed in hours
 - Contact in hours
 - CPEs
- 3 Click the **more** link to view associated competencies and subject areas for the course.
- 4 Additional course information includes:
 - Your enrollment status
 - Prerequisite status
 - View registration information
 - View your Learning Plan

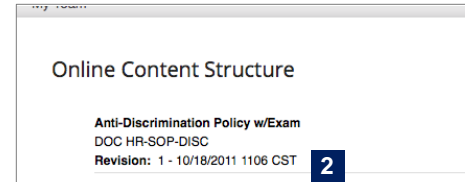
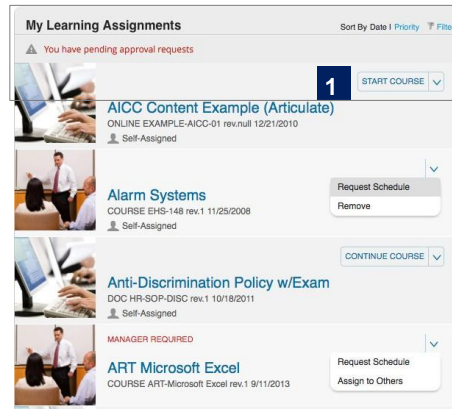
STEP BY STEP: LEARNING ACTIONS

Launch Online Content

Each learning activity is listed with a call-to-action button and status update. You can show/hide information, view the course start date and location for enrollment, and display curriculum requirements. You are able to launch online courses directly from Learning. The Online Content Structure window will launch once the page is loaded.

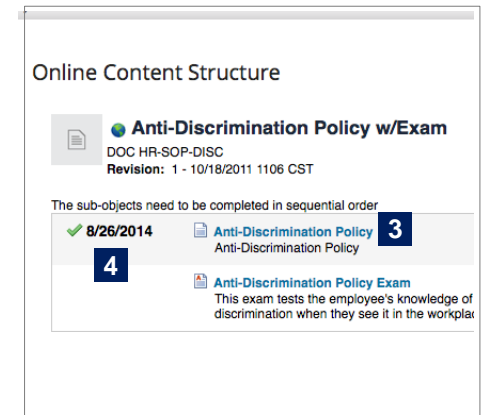
NOTE: Do not close the Online Content Structure window after you launch content. The window must stay open because it needs to record when you complete a content object.

- 1 Click **Start Course** from the learning assignment listing. The Online Content Structure page displays.
- 2 Review the outline of content objects. An item may contain one or more content objects.
- 3 Click the content object title link to launch the content object.
- 4 When the content object is complete, the window closes, and returns you to the **Online Content Structure** page. Completed objects will be listed with checkmarks and the date of completion.



Do not close, refresh, or navigate from this page while you are work content. Some content may rely on this window to save your progress.

When you have completed the content, you can relaunch the content menus or the links below to navigate elsewhere.



Continue a Course

To continue an online course:

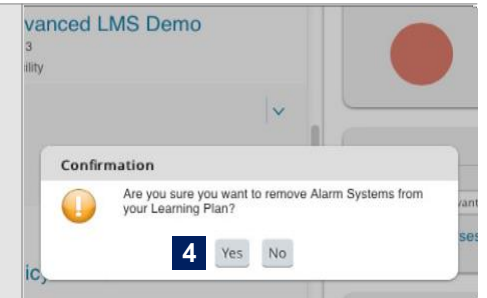
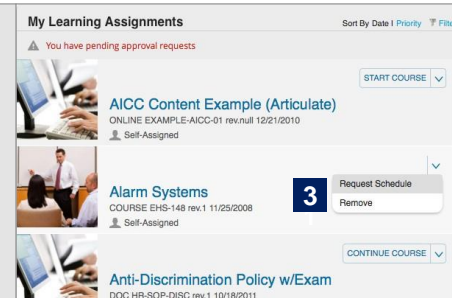
- 1 Select **Continue Course** on My Learning Assignments to re-launch online courses and activities.
- 2 The Online Content Structure page displays and the course launches in a new window.



Remove a Course

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

- 3 Select the course title and select **Remove**.
- 4 Click **Yes** to confirm removal. The course is removed from My Learning Assignments.



STEP BY STEP: LEARNING SURVEYS

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

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

1 Select **Add Comments** to add additional information to your response.

2 Select **Start Survey** to launch the survey.
NOTE: You may return to a survey by

Completing a Survey

3 Surveys in the LMS consist of a set of questions. Administrators can group related questions into a pool using an objective. Complete by selecting the appropriate response for each question.

4 Select **Add Comments** to add additional information to your response.

5 Click **Save** and **Close** to leave the survey and return at a later time.

6 Continue to click **Next Page** to answer additional questions.

7 When you have completed the questions, click **Submit**.

Spotlight: Types of Learning Surveys and Exams

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

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

The screenshot shows the 'My Learning Assignments' section in the SuccessFactors Learning interface. A search bar at the top right contains 'Carla Grant (cgrant)'. Below the search bar, there are tabs for 'My Learning' and 'My Team'. The main content area displays a list of assignments. One assignment is highlighted with a blue box and the number '1', showing a search for 'Surveys'. Below this, there is a section for 'OVERDUE' assignments. A survey card for 'SuccessFactors Global University Feedback Survey' is visible, with a 'CONTINUE SURVEY' button and the number '2' next to it. On the right side, there is a 'Find Learning' section with a search bar and a 'Go' button, and a 'My Curricula' section.

The screenshot shows the 'Survey' page in the SuccessFactors Learning interface. The title is 'SuccessFactors Global University Feedback Survey'. Below the title, there is a 'Please complete the following user satisfaction survey to rate the overall course, the instructor, course materials and training methods.' section. The survey is anonymous. There are buttons for 'Submit', 'Save', 'Close', 'Previous Page', and 'Next Page'. The survey consists of four questions, each with a Likert scale from 'Strongly Disagree' to 'Strongly Agree'. The first question is '1. The training class was relevant to my job.' and the second is '2. The training content provided me with new skills and knowledge related to my job.' The third question is '3. The training was well organized' and the fourth is '4. The training objectives were clear to me.' Each question has an 'Add Comments...' button. The page number is 'Page 1 of 1'. The footer contains copyright information for SuccessFactors, Inc. and the SuccessFactors logo.

STEP BY STEP: ONLINE EXAMS

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

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

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

Number	Question	Asked	Correct	Points Avail	Points Earned	Your Percent	Passing	Evaluation
Questions Presented by Objective								
Objective	Objective Name	Asked	Correct	Points Avail	Points Earned	Your Percent	Passing	Evaluation
187	187-Driver Education - 3 Safety	3	2	1.00	0.67	67.00%	75.00%	FAIL
188	188-Driver Education - 1 Signs and Signals	1	1	1.00	1.00	100.00%	75.00%	PASS
189	189-Driver Education - 1 Speed Limits	1	1	1.00	1.00	100.00%	75.00%	PASS