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# SuccessFactors: Manager Introduction

Welcome to the **Manager 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 MANAGERS

Quick Reference Guide



# MY TEAM FOR MANAGERS

## 1 Getting Started

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

## 2 My Team

The **My Team** page provides a workspace to access team members' records.

## 3 Team Members

Select an employee from the employee tree to:

## 4 Select [icon] to view the employee's quick card.

## 5 Use Show to filter the employee's learning plan.

## 6 Search the employee's learning plan

## 7 View the learning assignments of direct and indirect reports. Select a course title to review the course details and assignment.

## 8 Search Catalog

Searches for learning activities in the course catalog. Enter keywords in the text field and click **Go** or click the **Browse all courses** link to access the catalog.

## 9 Supervisor Links

Displays a list of manager actions available within the LMS. Use Supervisor Links to quickly go to different sections of the Learning module and manage your team's learning activities. Options include: Assign/Remove Learning, Register/Withdraw Employees, Approvals, and Reports.

## 10 Employee Status

Displays a pie-chart status of a selected employee's curricula, completed work, and competencies.

### Spotlight: Team Member Actions

Hover over a team member to view a list of actions including:

- 1 Select **Record Learning** to add learning events into the employee's learning history.
- 2 Select **Assign Learning** to search the catalog and assign learning.
- 3 Select **Register Employee** to register an employee for a course.
- 4 Select **Manage Alternate Supervisor** to assign alternate manager(s) to an employee. Either alternate or primary managers can complete the primary manager's tasks.

- 5 Select **Reports** to run reports on data such as learning history, learning needs (items currently on the learning plan) and curriculum status for the employee.
- 6 Select **External Requests** to review requests related to learning events such as an item, scheduled offering or external event.
- 7 Select **Options & Settings** to view notifications and time settings for the employee.

# STEP BY STEP: ASSIGN/REMOVE LEARNING

As a manager you may assign learning events to your employees. From the **My Team** page, click the **Assign/Remove Learning** link in the **Supervisor** links to step through the process of assigning or removing learning.

- 1 Click **+ Add** on **Items and Curricula**.
- 2 Use the search window to locate the course to assign to the employee. Select the checkboxes of the courses to be assigned.
- 3 Click **Add**.
- 4 Click **+ Add** on **Employees**.
- 5 Review the list of employees. Select the checkboxes of the employees to be assigned.
- 6 Click **Add**.
- 7 Review the assignment information. Enter the **Assignment Type**, **Assignment Date** and a **Required Date** of completion.
- 8 Click **Continue**. Confirm the information listed and click **Assign Learning**.

The screenshots illustrate the 'Assign Learning' process in SAP SuccessFactors. The first screenshot shows the 'Enter Learning Activity Details' form with the 'Items and Curricula' dropdown selected, opening a search results window. The second screenshot shows the 'Employees' dropdown selected, opening a list of employees to choose from. The third screenshot shows the final assignment details, including the course, employee, assignment type, and dates.

**Screenshot 1: Search Results**

Title	ID	Type	Priority	Select
ART Microsoft Excel	COURSE ART-Microsoft Excel (Rev 9/11/2013CST)			<input checked="" type="checkbox"/>
ART New Hire Orientation	COURSE ART-New Hire Orientation (Rev 9/10/2013CST)			<input type="checkbox"/>
Allowable and Unallowable Charges	COURSE FA-304 (Rev 11/25/2008CST)			<input type="checkbox"/>

**Screenshot 2: Employee Selection**

Name	Select
Carla Grant	<input type="checkbox"/>
Alexander Thompson	<input type="checkbox"/>
Darlene Sharp	<input checked="" type="checkbox"/>

**Screenshot 3: Assignment Details**



Title	Type	Assignment Type	Priority	*Assigned	Required Date	Remove
ART Microsoft Excel				8/26/2014		<input checked="" type="checkbox"/>

**Spotlight: Remove Learning**  
To remove an assigned learning, follow the steps above and select the course and employee assignment to be removed.

# STEP BY STEP: REGISTER/WITHDRAW EMPLOYEES

As a manager you may register your employees for scheduled offerings. From the **My Team** page, click the **Register/Withdraw Employees** link in the **Supervisor** links to step through the process of either registering or withdrawing employees.

## Register for Learning

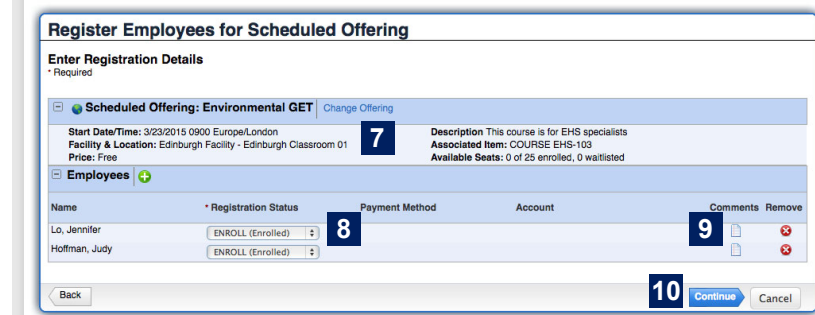
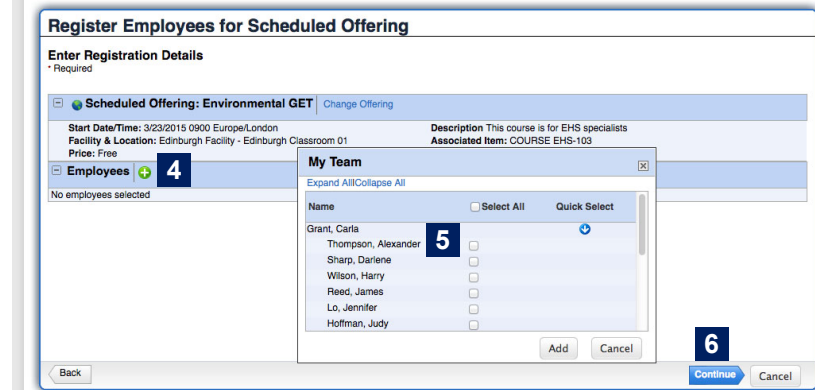
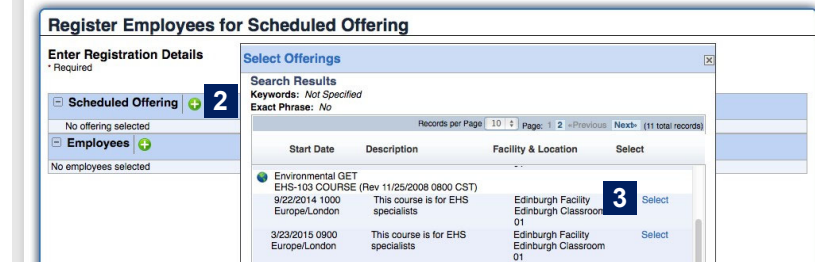
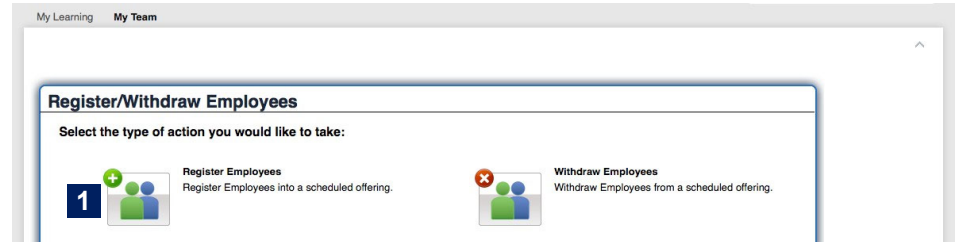
- 1 Select Register Employee and click Continue
- 2 Click  Add on Scheduled Offerings
- 3 Use the search window to locate the course to assign to the employee. Select the item to be recorded
- 4 Click  Add on Employee
- 5 Review the list of Employee. Select the checkboxes of the employees to be assigned. Click Add.
- 6 Click Continue

## Review Registration Information

- 7 Review the registration information
- 8 Enter the **Registration Status** for each employee
- 9 Use the **Comments** section to provide additional information related to the learning item and outcomes. These comments are appended to the learning event record.
- 10 Click **Continue** to move to the next steps. Review the information entered to register the learning item. Click **Register Employee** to finalize this step.

### Spotlight: Withdraw Employees

To withdraw employees from a scheduled event, follow the steps above and select the course and employee registration to be withdrawn.



Support

Support

Support

# STEP BY STEP: APPROVALS

As a manager you may approve your employees requests for learning events. From the **My Team** page, click the **Approvals** link in the **Supervisor** links to step through the process of approving requests.

- 1 Review the list of Pending Approvals including **Internal Training**, **External Training** and **E-Signature Verification**.
- 2 Review the list of approvals and select to **Approve**, **Deny** or **Stop** an approval.
- 3 Click **Next**.
- 4 Enter the justification in the comments field.
- 5 Click **Next**.
- 6 Review the information entered to register the learning item. Click **Confirm** to approve the request.

Learning ▾ Carla Grant (cgrant) ▾ People ▾ Search successfactors An SAP Company

My Learning My Team

### Pending Approvals

← Back Help

This view shows you all of the review and approval actions you have been asked to perform. It is divided into two primary sections: reviews and approvals for performance management Activities, such as competency assessments (only if available), and approvals for training requests. You may switch between sections by clicking on the appropriate section header. Within each section you will find a list of specific reviews or approvals you are being asked to perform, categorized by action type.

Training

Internal Training (0) 1

No items were found using this search criteria. All Direct Reports Only

External Training (1)

Enter Reasons for Approvals or Denials All Direct Reports Only Next 3

User Name	Title	Price	Type	Action [Approve All/Deny All]
Hoff, Marcus Q	Training	200.00	EXTERNAL LEARNING REQUEST	<input type="radio"/> Approve <input type="radio"/> Deny <input checked="" type="radio"/> Skip 2

My Learning My Team

### Pending Approvals

Approve or Deny → Approval Reasons Help

Enter a reason for approving your employee's training request below.

Previous Next 5

#### Approval Reasons

User Name and Schedule	Approval Reason (optional)
Hoff, Marcus Q Training	4

My Learning My Team

### Pending Approvals

Approve or Deny → Approval Reasons → Confirm Help

Previous Confirm 6

#### Approve

User Name	Title	Price
Hoff, Marcus Q	Training	200.00

## Spotlight: Approval Process

An approval process is a set of levels of approval an employee must go through before an enrollment in a scheduled offering or launch of any online item can be completed. An approval process prevents employees from launching an online item or registering for a scheduled offering without obtaining approval. Once the approval process is engaged, approvers are notified via email and an alert text is displayed on their home page.

# STEP BY STEP: REPORTS

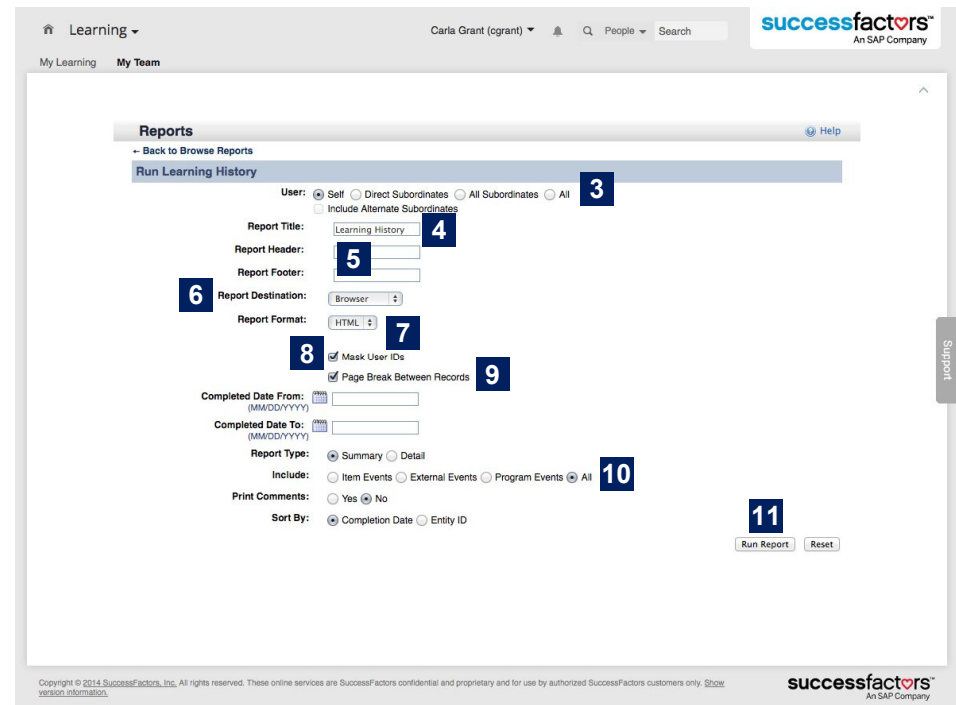
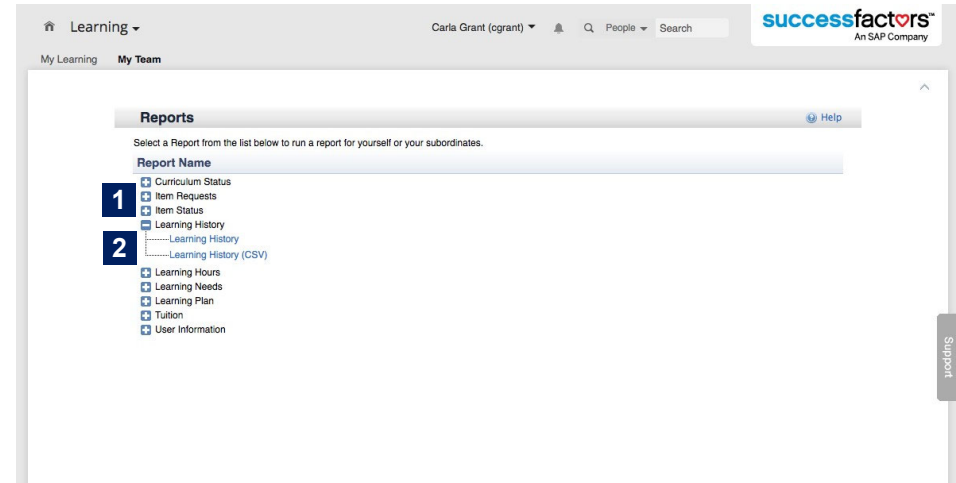
As a manager you may run reports on your team's learning activities. From the My Team page, click the **Reports** link in the Supervisor links to step through the process of creating a report.

- 1 Click **Expand** to expand the report group.
- 2 Click the title link.
- 3 Select to run the report on your own learning, direct reports, all subordinates or all employees you have permission to view.
- 4 Modify the **Report Title**, if necessary.
- 5 Enter a header and footer for the report.
- 6 Select the **Report Destination** from the drop-down menu.
- 7 Select the **Report Format** from the drop-down menu.
- 8 To hide user IDs, check the **Mask User IDs** checkbox.
- 9 To insert page breaks between records returned, check the **Page Break Between Records** checkbox.
- 10 Select to include item, external or program events.
- 11 Click **Run Report**.

## Spotlight: Key Reports

Each report offers options for selecting, grouping and sorting your output in various ways. Output types include CSV, HTML, and PDF formats.

- **Certificate of Completion Report:** Create a report of printable certificates of completion for Learners by learning item.
- **Curriculum Status:** Display information related to the status of the Employees assigned Curriculum.
- **Item Status:** Displays information about an employee's completion status for Items during a specified time period.
- **Learning History:** Displays information about Items that Employees have completed.
- **Learning Hours:** Displays the total number of "hours" of a specified type that the selected team members have completed. The reports can show total hours by credit hours, CPE hours, contact hours or total hours.
- **Learning Needs:** Displays information about the Items that have been assigned to the Employee that need to be completed.
- **Scheduled Offering Report:** Displays detailed information about each scheduled offering including the item scheduled, dates scheduled, registration and wait-list data, instructor data, segment data, and delivery costs.



# STEP BY STEP: RECORD LEARNING

As a manager you may add recorded learning items and external learning events to your employees. From the My Team page, click the **Record Learning** link in the Supervisor links to step through the process.

## Record Learning

- 1 Select Item to record a learning event **Item based event** or select **External Event** to include information from an separate external source. Click **Continue**.
- 2 Click **+** **Add on Items**.
- 3 Use the search window to locate the course to assign to the employee. **Select** the item to be recorded.
- 4 Click **+** **Add on the Employees**.
- 5 Review the list of employees. Select the checkboxes of the employees to be assigned.
- 6 Click **Add**.

## Enter Learning Event Information

Use the **Enter Learning Event Information** screen to enter your details of the learning event.

- 7 Enter the completion date in the Completion Date and Time
- 8 Enter the **Instructor ID** and **Instructor Name**. Click Select to choose the instructor.
- 9 If required, enter **Total**, **Credit** and **Content hours** earned for the item
- 10 Enter the **CPE** credits earned

## Edit User Event Information

Use the **Edit User Event Information** screen to provide additional details related to the item.

- 11 Enter your **Grade** for the course
- 12 Select the **Completion Status**
- 13 If needed, enter the costs related to the learning item. These costs associated with the learning item are listed.
- 14 Use the **Comments** section to provide additional information related to the learning item and outcomes. These comments are appended to the learning event record.
- 15 Click **Continue** to move to the next step. Review the information entered on to record the learning item. Click **Record** to append the learning item to the employee's learning history.

**NOTE:** To record an external event, follow the steps above and select the course and employee assignment to be recorded.

The screenshots illustrate the following steps:

- Step 1:** The 'Record Learning' screen shows two options: 'Item based event' (selected) and 'External Event'. A '1' is placed over the 'Item based event' option.
- Step 2:** The 'Enter Item Details' screen shows a search window for 'Search Results'. A '2' is placed over the 'Add on Items' button.
- Step 3:** The search results window shows a list of courses. A '3' is placed over the 'Select' button for the 'AT New Hire Orientation' course.
- Step 4:** The 'Enter Item Details' screen shows the 'Employees' section. A '4' is placed over the 'Add on the Employees' button.
- Step 5:** A 'My Team' pop-up window shows a list of employees. A '5' is placed over the checkbox for 'Jennifer Lo'.
- Step 6:** The 'Enter Item Details' screen shows the 'Add' button. A '6' is placed over the 'Add' button.
- Step 7:** The 'Enter Item Details' screen shows the 'Completion Date' field. A '7' is placed over the date field.
- Step 8:** The 'Enter Item Details' screen shows the 'Instructor ID' and 'Instructor Name' fields. A '8' is placed over the 'Select' button.
- Step 9:** The 'Enter Item Details' screen shows the 'Total Hours' field. A '9' is placed over the 'Total Hours' field.
- Step 10:** The 'Enter Item Details' screen shows the 'CPE' field. A '10' is placed over the 'CPE' field.
- Step 11:** The 'Enter Item Details' screen shows the 'Employees' table. A '11' is placed over the 'Grade' column.
- Step 12:** The 'Enter Item Details' screen shows the 'Employees' table. A '12' is placed over the 'Completion Status' column.
- Step 13:** The 'Enter Item Details' screen shows the 'Employees' table. A '13' is placed over the 'Costs' column.
- Step 14:** The 'Enter Item Details' screen shows the 'Employees' table. A '14' is placed over the 'Comments' column.
- Step 15:** The 'Enter Item Details' screen shows the 'Continue' button. A '15' is placed over the 'Continue' button.