HR Part II

Lesson 01: Learning Terminology , Overview of User Experience & Admin Experience

Lesson Objectives

The goal of this section is to provide you with a general introduction to the SAP SuccessFactors Learning Management System (LMS); how to access it, how to navigate, understanding the data files and structure, and how security is maintained.

Understanding key terms and concepts specific to the SAP SuccessFactors Learning application and how they relate to your business is essential to successful configuration workshops.

After completing this lesson, participants will be able to gain an understanding of:

- Learning Terminology and Overview
- Learning Needs Management model
- Identify admins and users in SuccessFactors Learning
- Navigate within SF Learning as an Admin
- Work with and organize bookmarks and recents
- Create search filters and search for records
- Download and view or save search results

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Introduction

SAP SuccessFactors Learning is a Learning Management System (LMS) designed to facilitate tracking of the comprehensive range of information that organizations need to manage their learning programs effectively. SAP SuccessFactors Learning enables its administrators to make informed decisions about their user population, learning assignments, learning completions, scheduling, and resources.

Agenda

- Terms & Concepts
- User Access & Actions
- Learning Plan & Status Pods
- Launch Online Content & Exams
- Register into an Offering
- Search Catalog & Self Assign Training
- Supervisor Actions
- Admin Access & Actions
- User Records & Attributes
- Learning Items & Curricula
- Assign & Track Learning
- Schedule ILT Items
- Manage Admin Access

Key Terms & Concepts

Admin	Org Owner Supervisor User
Domain	Catalog
Learning Plan	Learning Plan/ To Do List
Learning History	Completed Work

- **2 Sides to the Application:**
  - User
  - Admin
- **Domains control admin access to records**
- **Catalogs control the list of training available to the user for self assignment / enrollment.**

Accessing SAP SuccessFactors Learning

The SAP SuccessFactors HCM suite (formerly known as BizX) and the SAP SuccessFactors Learning application are fully integrated into one common interface. People using the SAP SuccessFactors Learning system will access various menu choices, tiles, and tabs depending on who they are and what responsibilities they have.

An **admin** is an administrator for SAP SuccessFactors Learning. An admin can have many different types of responsibilities including adding or editing user records, creating learning records, assigning training, scheduling training, enrolling users, granting users credit for completing training, and running reports.

A **user** is considered the end user of SAP SuccessFactors Learning. Users include supervisors, instructors, Human Resource Business Partners (HRBPs). Users may view their own training needs, register for training sessions, launch online training, self-assign learning, and run reports. Supervisors and HRBPs may view and manage the training needs of other users for whom they are responsible.

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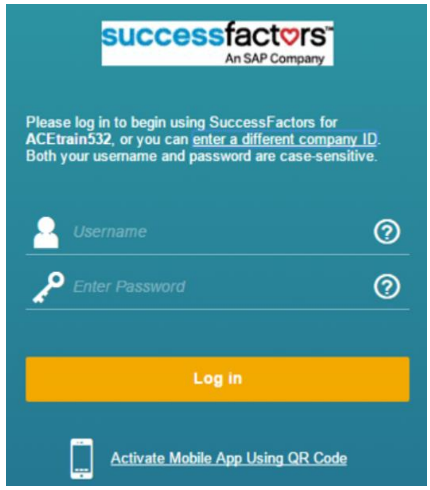
SAP SuccessFactors HCM/Learning Integrated Environment

1. Enter the URL into your browser and hit your Enter key or click Go. The SAP SuccessFactors log in screen displays.



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SAP SuccessFactors HCM/Learning Integrated Environment

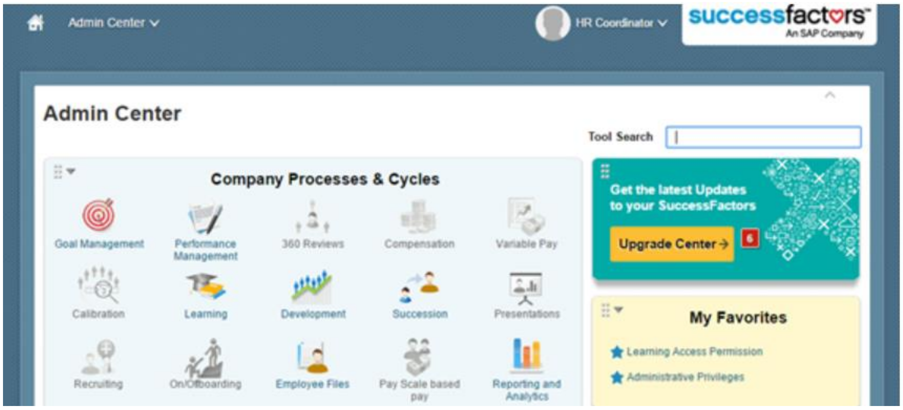
2. On the first page enter your Company ID. Then on the next screen enter your username and password and click *Log in*.

The SAP SuccessFactors *Home* page displays.

SAP SuccessFactors HCM/Learning Integrated Environment

3. Click your name (in this case, Admin User (admin)) and select *Admin Center* from the drop-down menu.

The *Admin Center* page displays.



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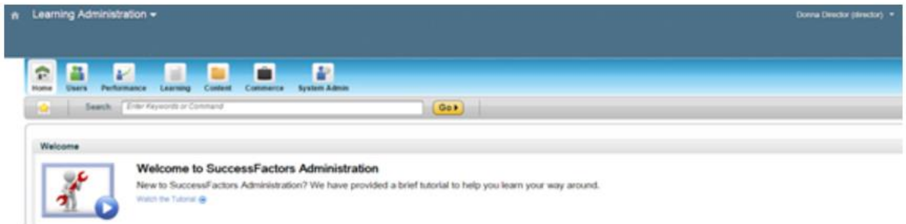
SAP SuccessFactors HCM/Learning Integrated Environment

4. Click *Learning and select Learning Administration*.

   Note: If you receive a security warning, click *Continue*.

5. SAP SuccessFactors *Learning Administration* opens.



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SAP SuccessFactors Learning Process

The LMS manages the entire learning life cycle including what users may see and do (as shown in the figure):

- Search their catalog in order to self-assign learning records (items, curricula, or programs that have been placed there for self-assignment)
- Self-register into scheduled offerings of Instructor-Led items or Launch online learning modules for self-paced learning
- View Supervisor- or admin- assigned learning that display on their My Learning Assignments tile
- View their Learning history (containing records of learning events that have been completed)
- Submit feedback on evaluations and run reports

The Learning Needs Management Model illustrates the flow of how training is tracked in SAP SuccessFactors Learning.

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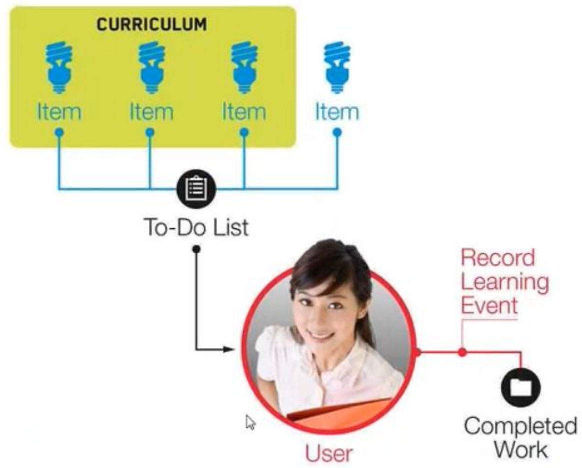
Overall Flow of Learning Needs Management

The Learning Needs Management Model illustrates the process flow of how training is completed inside the Learning Management System.



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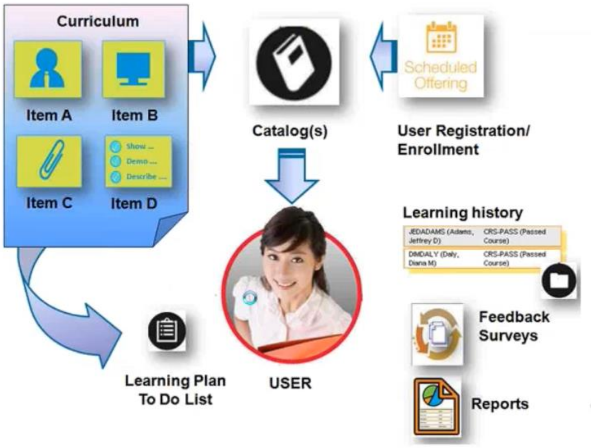
Learning Needs Management Model

The Learning Needs Management Model outlines the basic workflows surrounding the grouping of items, assigning items to a user's Learning Plan, and recording a completed learning event to be listed in the user's Learning History.



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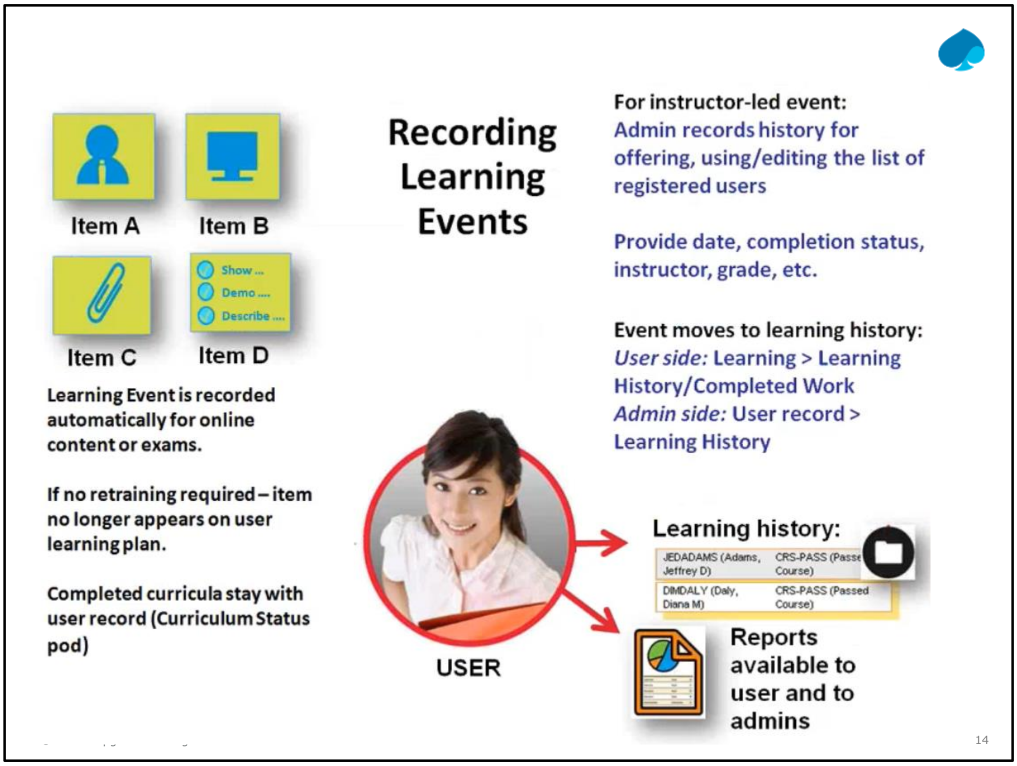
Recording Learning Events
Item A
Item B
Item C
Item D
Show ...
Demo ....
Describe ....
Learning Event is recorded automatically for online content or exams.
If no retraining required – item no longer appears on user learning plan.
Completed curricula stay with user record (Curriculum Status pod)
For instructor-led event:
Admin records history for offering, using/editing the list of registered users
Provide date, completion status, instructor, grade, etc.
Event moves to learning history:
User side: Learning > Learning History/Completed Work
Admin side: User record > Learning History
USER
Learning history:
JEDADAMS (Adams, Jeffrey D)
DIMDALY (Daly, Diana M)
CRS-PASS (Passed Course)
Reports available to user and to admins
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Implementing the Learning Needs Management Model

By implementing the enterprise-wide SAP SuccessFactors Learning system, your organization can easily track and report on the current training status of your user population. The system can help determine who needs what training, allow admins to assign training and schedule training offerings, track offering registrants, and track which users have attempted/completed the training requirements.

The following steps should be followed to successfully implement the Learning Needs Management Model:

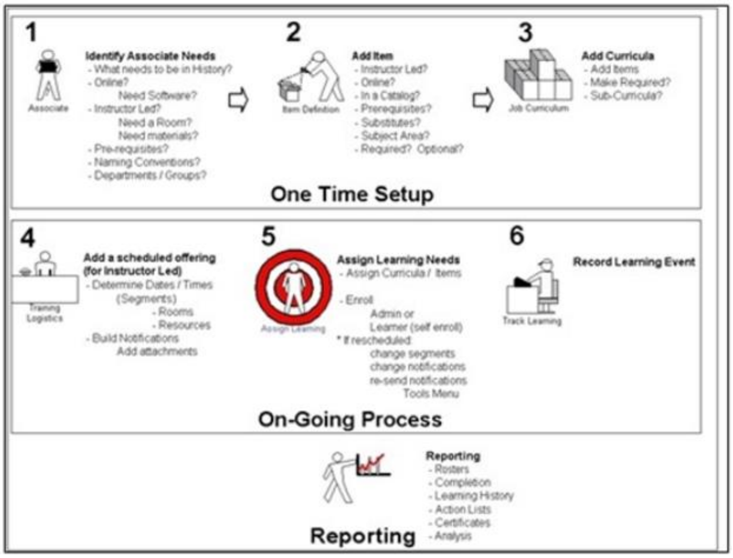
1. Identify learning needs (outside SAP SuccessFactors Learning).
2. Add items in SAP SuccessFactors Learning.
3. Group items into curricula and programs if desired.
4. Assign Learning Needs to Users.
5. Record Learning Events.

Items are the building blocks of SAP SuccessFactors Learning. They are the smallest assignable units which typically represent all forms of training activities, including online and instructor-led courses, on the job training, and task checklists. They may also be used to represent non-training activities such as passing an annual physical, having a valid passport of driver's license, reading a book, or watching a video from a DVD. Additional activities called *External Events* may be tracked in the learning history, but we cannot assign them, schedule them, or have them available in the catalog (unless they are items).

Instructor-led items may be scheduled and the offerings may also be added to the catalog. The user registers into an offering and attends training or completes the training online and the learning event for each item is recorded in his/her learning history.

Implementing the Learning Needs Management Model

The figure depicts the process required to implement the Learning Needs Management model.



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The Learning Needs Management Model and Related Terms

Any of these learning records (items, curricula, and programs) may then be assigned to users or made available through catalog(s).

Note: Admins do not have to place records into catalogs if they will only be **pushing** assignments and registrations. Catalogs are only necessary if users will be self-assigning or self-registering. Registration is a term used only to describe enrollment into scheduled offerings of an instructor-led (or blended) item. Online or other items do not require or permit registration.

When assigned to users through one of the methods of assignment including self-assignment, individual assignment by supervisor or admin, batch assignment, or automated assignment (based on user attributes), items are added to each user's learning plan (My Learning Assignment tile). Once an item is completed, a Learning Event is recorded against it and the item appears to move into the user's Learning History. Learning events will display in the history as either successfully completed or as an unsuccessful attempt.

Terms Related to the Learning Needs Management Model 1/4

To begin understanding the Learning Needs Management Model, it is important to learn some key terms and definitions that are associated with the model.

Term	Definition
Admin	A person with the ability to create and assign learning records, run reports, and mark training completions for users. Different Admin roles may include different permissions for Admin access.
Catalog	Provides access to items, curricula, programs, and scheduled offerings that users can self-assign, self-register, recommend, or assign/register others, (if they are supervisors or HRBPs).
Curriculum	A set of one or more items that can be assigned and tracked as a group. Curricula may be used to track recurring training, allow credit for previously completed training, and provide users with a choice of how to complete requirements.
Domain	A location for certain records in the system that is used in the security model to provide or restrict access to certain administrators. A record may be placed into a domain to indicate that only other admins who have access to that domain may view or edit the record. Admin roles will include domain restrictions to indicate which specific domains the admin may access.
Evaluations	Automatic assignment of a survey to collect user feedback immediately after training. Or a follow up survey that gives a user and/or supervisor a chance to evaluate the application of their training.
HRBP	Human Resource Business Partner – responsible for the learning needs of multiple users across the company. Similar access to the user side as for a supervisor.

Terms Related to the Learning Needs Management Model 2/4

Term	Definition
Instructor	A resource who will deliver instruction or facilitate a schedule offering. Instructors are able to view the details of their scheduled offerings including segment details and registrations. They may notify users registered in their offerings, start virtual learning session (VLS) offerings, and possibly record learning events for their scheduled offerings.
Item	Also known as "courses" or any activity that can be assigned, tracked, and completed. Completed items are written to the user's learning history.
Learning Event	The successful completion (or the unsuccessful attempt at completion) of an item, offering, or external event. A completion status provides details to indicate whether the user received credit.
Learning History	All the learning events recorded for the user. May contain multiple events for the same item if the item was completed/attempted multiple times.
Learning Plan/My Learning Assignments	List of items and related activities (such as surveys) that are currently assigned to the user. May include requirements, optional items, and items that the user has self-assigned. A preview of the Learning Plan will be visible from the SuccessFactors HCM To Do List.

Terms Related to the Learning Needs Management Model 3/4

Term	Definition
Program	A series of learning activities such as items, links, and text that may be assigned to users or made available in the catalog. Program activities may need to be completed in sequence or during specific date periods. Scheduled-type programs may contain specific scheduled offerings and permit the users to be registered into all of them at the same time when they are registered into the program itself.
Registration/Enrollment	Associating a user with scheduled offering. User status can be enrolled, waitlisted, cancelled, or pending (waiting approval).
Reports	Users can run reports on data such as learning history, learning needs (items currently on the learning plan), and curriculum status. Admins may run these as well as additional reports.
Scheduled Offering	A specific occurrence of an instructor-led item on the calendar with dates, times, and resources. Users may be permitted to self-register into the offering of their choice.
Supervisor	The person who is listed in the primary supervisor field of a user record. Supervisors may see all of their direct and indirect subordinates on one screen and may view their learning assignments and learning histories. They can also assign training to their employees and may be permitted to register users into scheduled offerings, record learning for users, and run reports. Additionally, supervisors may delegate permissions to other users (delegate supervisors). Alternate supervisors may be designated if users have multiple people responsible for assigning and tracking training for them.

Terms Related to the Learning Needs Management Model 4/4

Term	Definition
User	The person who accesses the LMS to find out what activities are available or due. Anyone for whom we want to track learning needs and learning events. Users, supervisors, HRBPs, and instructors may all access the LMS from the User-side of the application. Anyone who performs administrator functions must be given an Admin Role and will access the LMS from the Admin-side.

Domains

Consider the domain structure to be a critical part of your company's security model for admin access to records.

When an admin creates a learning record (such as an item, curriculum, or program), it will be placed in a domain.

The only admins that will be able to view edit or assign the record are those who have admin roles that permit them to access the records in that domain. The PUBLIC domain represents an unsorted and open-access domain that is not usually used to store most records. It is strongly recommended that admins consider carefully where they place each record so that it may only be accessed by the appropriate admins

Catalogs

Catalogs control which items, curricula, or programs a user may self-assign. They may also control which scheduled offerings users may see and self-register into (if permitted). Different user populations may have access to their own catalogs and users may have access to multiple catalogs.

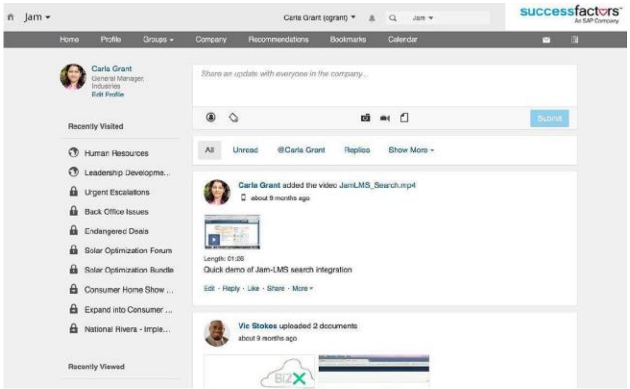
SAP SuccessFactors Learning Capabilities

Think about which of these processes your organization uses today. Are there any processes your organization
plans to implement in the future?
SAP SuccessFactors Learning helps organizations manage learning programs effectively.
From an administrative perspective, SAP SuccessFactors Learning is capable of managing the processes
depicted in the Figure.

SAP JAM Basic

With the learning implementation, you are granted free access to SAP Jam basic. This is a limited version of the full SAP jam product and SAP SuccessFactors Learning will not be integrated with SAP Jam unless the enterprise edition is purchased.

SAP JAM is a social collaboration and decision-making solution that brings together people, processes, information and applications to enable better problem-solving and decision making. With SAP Jam, enterprises can use social networking to allow their employees and partners to collaborate on projects, learn, and innovate together.



Navigating the User Interface – Overview

Overview

A user is considered the end user of SAP SuccessFactors Learning. Users include supervisors, instructors, and Human Resource Business Partners (HRBPs). This lesson will provide an overview of navigating the user interface.

Objectives

Upon completion of this topic, you will be able to:

- Describe the main tiles of the user interface
- Identify and describe the links of the user interface
- Explain supervisor functionality
- Explain instructor functionality
- Access user reports

The User Experience: User Interface Overview

In this section, you will begin with a tour of the system as a user. The facilitator will demonstrate steps to perform the key interactions described in the learning life cycle. This tour helps:

- Provide a visual guide for the concepts described in the introduction
- Give realistic scenarios for the actions users perform in the system
- Demonstrate the flow of interactions for users
- Begin to point out the related areas where you will make decisions about system configuration

The tour and discussion of the user experience builds your foundation of knowledge about LMS key terms and concepts. For each term described in the learning life cycle, you will see how the user accesses that function.

This sets a meaningful context to understand LMS decisions covered in a later section, which includes details on:

- Mechanics for getting user records into the LMS
- Available fields in a user record
- Managing admin access to user records

The user can access the application via a web browser or with the SAP SuccessFactors Mobile app.

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Accessing SAP SuccessFactors Learning as a User 1/2

Users begin by accessing the SAP SuccessFactors HCM (formerly BizX) To Do list. Their **To Do** list will show the top five items they have due the soonest. They will also be given a link in the To Do list that will navigate them to their learning page.

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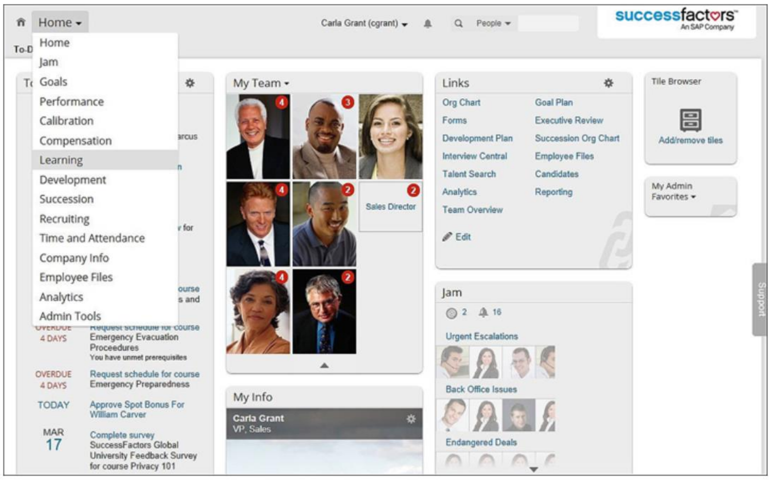
Accessing SAP SuccessFactors Learning as a User 2/2

Additionally, from within SAP SuccessFactors HCM, users may access the user interface of SAP SuccessFactors Learning by selecting the ***Learning*** option from the drop-down ***Home*** menu.



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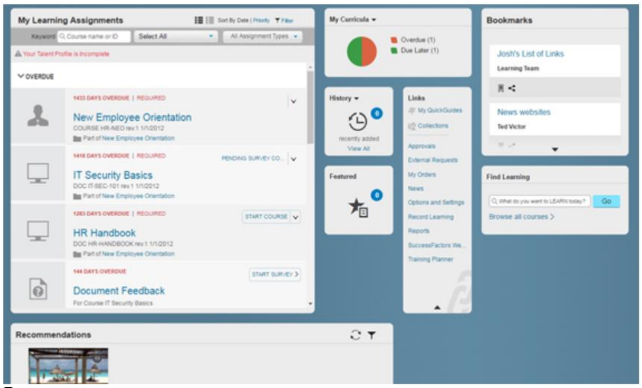
Learning Landing Page (SF Learning Home Page)

This page displays the *My Learning Assignments* (or Learning Plan) tile and other tiles including *My Employees* (if the user is also a supervisor).



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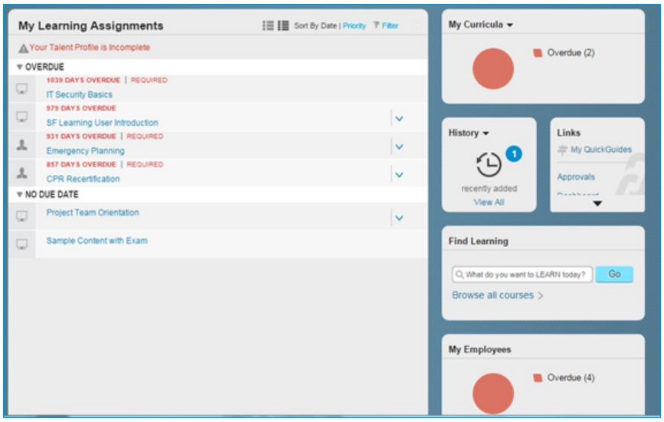
Learning Landing Page (SF Learning Home Page)



Additional tiles include: *My Curricula, History* (Learning History), *Links, Find Learning* (Catalog), *Recommendations, Featured, Bookmarks,* and others. If custom tiles have been created, they may be available to users in certain organizations or a group of users that are defined by an assignment profile and are not necessarily in the same organization.

Note: If the *Self-Assigned* tile is enabled, items that are self-assigned will only appear on this tile and not in the *My Learning Assignments* list as well.

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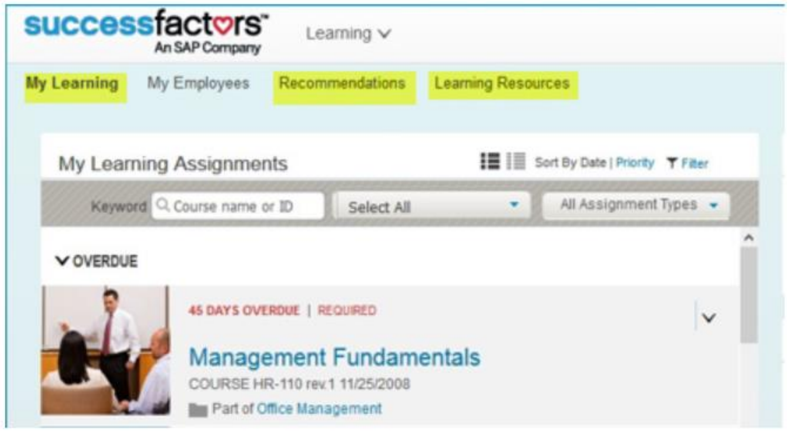
Landing Page with Additional Custom Pages

The user-side tiles may be logically organized among up to five pages including the system landing page. There are links at the top of the screen that will direct the user to the appropriate page. This may be used, for example, to display all the critically important tiles on the main page and other optional tiles (such as *Recommendations, Find Learning,* and others) on another page.



User Access: Define Roles and Workflows

You can configure user roles within SAP SuccessFactors Learning to manage tile and link access for different user populations. Multiple user roles can be defined to tailor the end user experience for certain populations of your users.

For example, you may have contractors who access the system to complete required training; however, you may not want this group of users to search for additional items and self-assign trainings.

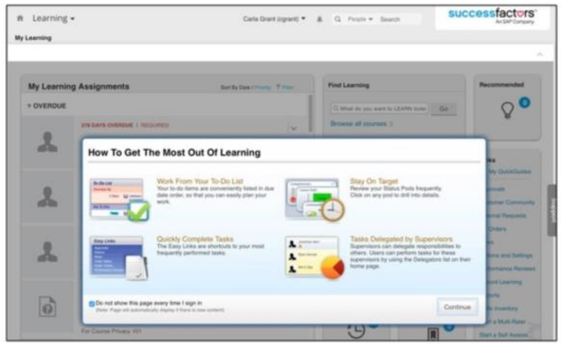
User News Page

News Page: Define Content and User Access

You can define the contents of the News page as a user introduction.

For an integrated environment, you can still show the News page. You can set the behavior of the News page on login to:

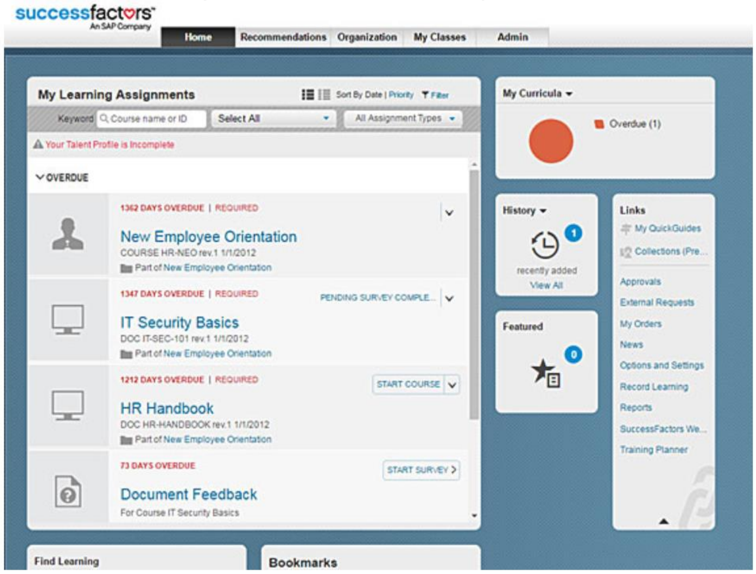
Never – News page will not display at log in; user can use Links > News to access the page at any time
Always – User will always view News page upon log in
User Discretion (default) – Display a checkbox so the user can skip the News page; the News page will automatically re-display as new content in the added page



The default News page contains a brief introduction for users. The purpose of this page is to alert your users of what is happening with learning in your company. This page can be used as a way to broadcast learning FAQ’s, initiatives, or new information to your users.

User Home Page Layout 1/3

This section describes the interface and gives tips on navigation for the user role. Later, you will look at the supervisor screens.



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User Home Page Layout 2/3

The user aid navigation is fully Section 508 compliant. All screens are available to a screen reader such as JAWS (Job Access With Speech). When using JAWS or similar screen readers, users have the option to turn on accessibility mode.

The LMS user side layout is comprised of between one and five configurable landing pages each with configurable tiles.

These pages and tiles are configurable by an administrator who determines which tiles are to be displayed on which pages and the size of each tile. End users can drag and drop the tiles on a page in order to create their own personalized view. Available tiles include:

- **My Learning Assignments** – This tile displays items, curricula, requirements, surveys, and programs assigned to the user. Each entry may have a call-to-action button, drop down button and a status, with configurable data fields and display of start and end dates for enrollments.
- **My Curricula** – This tile displays a pie-chart status of items within assigned curricula.
- **Learning History** – This tile displays events recorded in the last 30 days. New events can be recorded from this tile, as well.
- **Find Learning** – This tile allows the user to search and browse the Catalog.

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User Home Page Layout 3/3

- **Featured** – Items that were flagged as New, Featured, or Revised appear here.
- **Links** – This tile displays links to standard functions within on the user side such as: My Quick Guides, Collections, Reports, Record Learning, Approvals, and others. Easy Links to internal or external web pages may also be created by admins and displayed here.
- **My Employees** – This tile is available to supervisors, and displays a pie-chart status of all subordinate assignments.
- **Recommendations** – Items, Curricula, Collections, and Programs that were recommended by the user's peers or by admins.
- **Available Scheduled Offerings** – Offerings for items that are assigned to the user and in the user's catalog.
- **Self-Assigned** – Items that the user has self-assigned from their catalog. Note: if this tile is enabled, the self-assigned items will only appear here and not on the My Learning Assignments tile.
- **Bookmarks** – Records that the user has bookmarked for easy access later.
- **Custom Tile** – This tile is configurable with a rich text editor or HTML by an administrator to provide media rich content to users.
- **Achievements** – This is used to display a leader board when Gamification is enabled.

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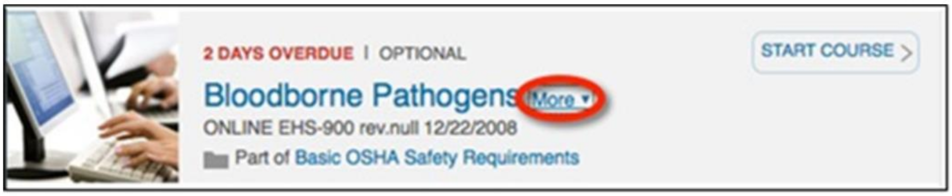
Home Page > My Learning Assignments: View and Interactions 1/3

My Learning Assignments tile displays a list of assigned activities related to learning. Users can view assignments and related details, launch training, register for offerings, complete surveys, and much more. This tile includes call-to-action buttons and statuses per item, ability to show/hide additional filters, configurable data fields, display of start date and location of enrollments, and one click to display curriculum environments.

Note: Up to five items and five assigned course surveys will be displayed on the consolidated SAP SuccessFactors HCM To-Do List. If there are more than five items, there will be a link to **View Additional Learning**.

The user can select the **More** link to display additional item information on the item detail page.



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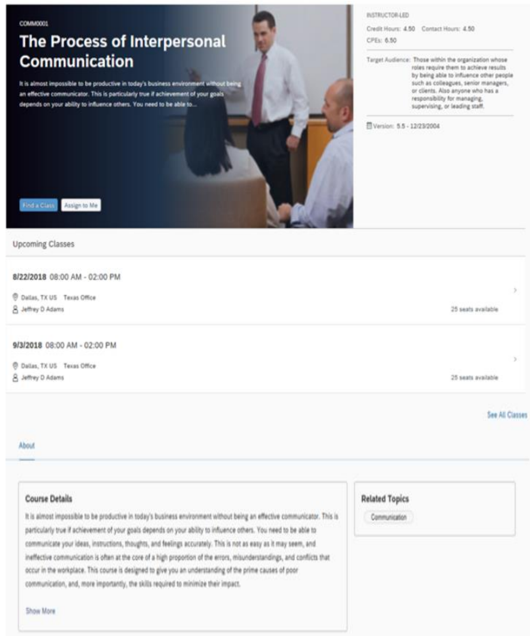
Home Page > My Learning Assignments: View and Interactions 2/3

Viewing Details about an Instructor-Led Item:

When users click on the title of an item that's in their catalog or on their Learning Plan, they may get more details about the item. For all items, they can see the item ID, title, description, hours, audience, and version. For instructor-led items, they can view upcoming classes (scheduled offerings) and self-register (if permitted).

The user may click on each class to get more details about it or click the *See All Classes* link to see all scheduled offerings that are in the user's catalog for this item.



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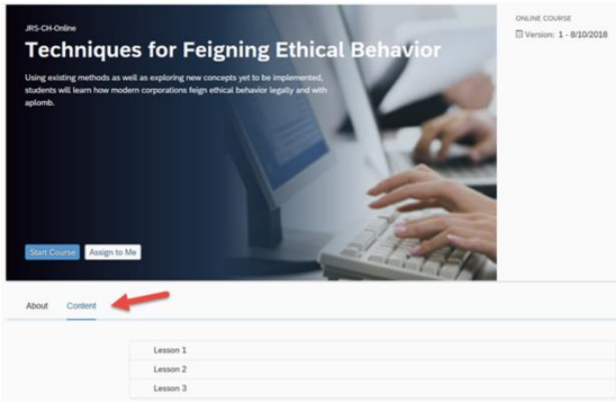
Home Page > My Learning Assignments: View and Interactions 3/3

Viewing Details about an Online Item:

Online Items that are in the catalog will offer users the ability to view the content structure before deciding whether to launch the course or assign it to themselves.

Once the item is launched, the user may navigate through the various content objects and/or assessment objects in the structure (if permitted) or they will proceed through them in sequence. When the content has been finished, the user will see a confirmation message and if there is a survey attached, they will see a link to launch it.



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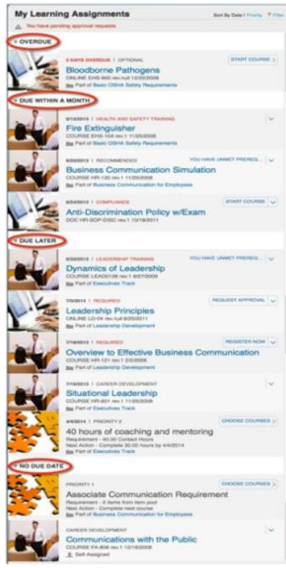
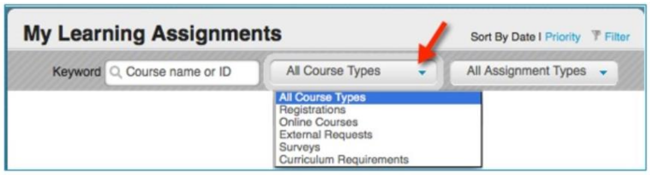
My Learning Assignments: Define Buckets for Due Dates



You can define the range of due dates to include in each "bucket" on the Home page, as shown in the figure. Default values are: Overdue, Due within a Week, Due within a Month, Due Later, No Due Date (for items that are self-assigned or have no required due date).

By default, **My Learning Assignments** is sorted by date. However, you can sort the list by item priority by clicking the Priority link, or create a view filter.

By selecting the **Filter** link, a row of fields appears. The user can enter a keyword and select the Course Type and/or Assignment Type.



My Learning Assignments: Items may be Hidden

Under certain circumstances, there may be items that are assigned to the user that are hidden from this view of the user's learning plan.

When items with retraining are assigned as part of a curriculum, the user will see the item once on their learning plan the first time it needs to be completed. Each time the item is completed successfully, the item will be recorded into the learning history and will reappear on the learning plan.

Globally, we can configure the amount of time between when the item reappears and when it is due again. If they reappear immediately, the user may be able to take the training again any time before it is next due – however, they may get confused and not notice that the due date is far in the future. If we hide the item until 90* days before it is due again, the user would not see it on their learning plan and therefore not be tempted to take it again too early.

Similarly, free-floating items (that are assigned individually and not part of a curriculum) may be hidden from the learning plan until 90* days before they are due. This helps keep the user focused on what they need to do in the short term.

*90 days is just an example – you may decide how many days for each of these configuration settings.

If an optional item has been assigned to the user as part of a curriculum, the user may hide it from themselves.

My Learning Assignments: Launch Online Content

From **My Learning Assignments**, users can launch a variety of content that is set up by an admin to be available online. The facilitator will demonstrate two broad categories of online content:

Access an online document with an option for “read and acknowledge”

Launch web-based training (WBT) as a self-paced module with menus, embedded quizzes, etc.

There are no specific configuration decisions related to online content. Refer to the discussion on “Approvals” for scenarios in which users need approval before launching content.

My Learning Assignments: Launch an Exam Type Assessment

Customers often want a way of testing and tracking user knowledge through assessments. Admins may use the Question Library to build questions for exams, or they may create an exam type assessment and add questions directly or from the library. Admins may define behaviors such as:

- Passing grade
- Post Exam Behavior
- Feedback to the Users
- Exam Type (Sequential, Freeform)
- Exam Attempts
- Randomization of Questions

You can set up an item to contain just one assessment, or you can mix and match online content plus assessments in one item.

Exam questions exist as separate entities in a Question Library that may be mixed and matched on different exams. Exam questions may be linked to learning objectives making it possible to track learning evaluations (pre-test and post-test). When exam type assessments and content objects are used in the same item, adaptive learning may be configured to permit users to test out of content based on their performance on one or more learning objectives.

My Learning Assignments: Launch a Quiz Type Assessment

Alternatively, admins may create quiz type assessments using the Assessment builder. Quizzes can do most of the things exams can do, except:

- Quiz questions exist only on the assessment; not as separate entities
- Quiz questions cannot be linked to learning objectives (no adaptive learning or learning evaluations)

Admins may define behaviors such as:

- Passing grade
- Feedback to the Users
- Quiz Type (Sequential, Freeform)
- Quiz Attempts
- Randomization of Questions
- Quiz Review

My Learning Assignments: Register into a Class (Scheduled Offering) 1/4

For instructor-led items, the user needs to be registered into a scheduled offering and attend it to fulfill the requirement.

If you want users to self-register for an offering, an admin must:

- Create one or more scheduled offerings with start dates/times
- Make the offerings available for self-registration
- Place the offerings in a catalog for the user

The user sees the assigned item on the Learning Plan and can find the date(s)/time(s) that it is scheduled. This allows the user to self-register into a class (scheduled offering) for the course.

Some scheduled offerings will be visible in the user's catalog permitting them to get more information about them – however, they may not permit self-registration. For those offerings, there will usually be contact information, so the user knows whom to contact for registration.

Other scheduled offerings do permit self-registration but may have an approval process that the user would have to complete successfully before they are considered enrolled.

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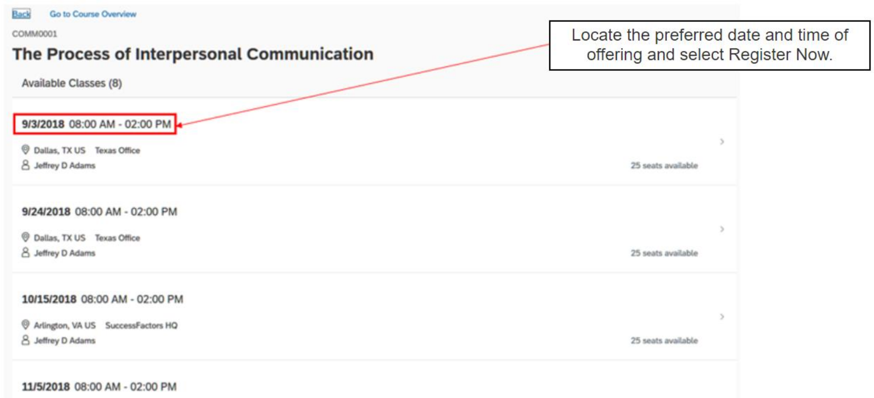
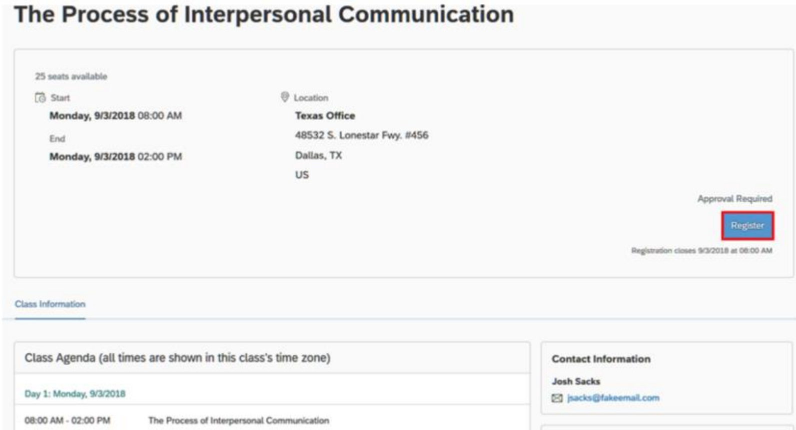
My Learning Assignments: Register into a Class (Scheduled Offering) 2/4

The user will find specific information about each scheduled offering on the Class Information screen. This information may include the dates and times of each segment of the offering, the instructor and room, the address of the facility (location), contact information and a button to register or join the waitlist (if permitted).

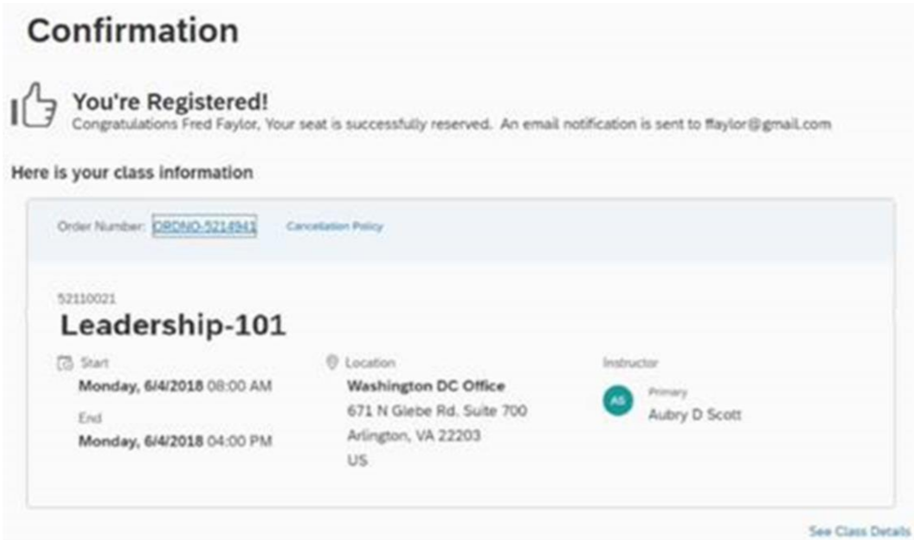


My Learning Assignments: Register into a Class (Scheduled Offering) 3/4

If the user clicks the *Register* button and there is no approval required, they will see a confirmation that they are successfully enrolled. If approval is required, they see that their status is Pending and a list of the potential approvers (such as their Manager).



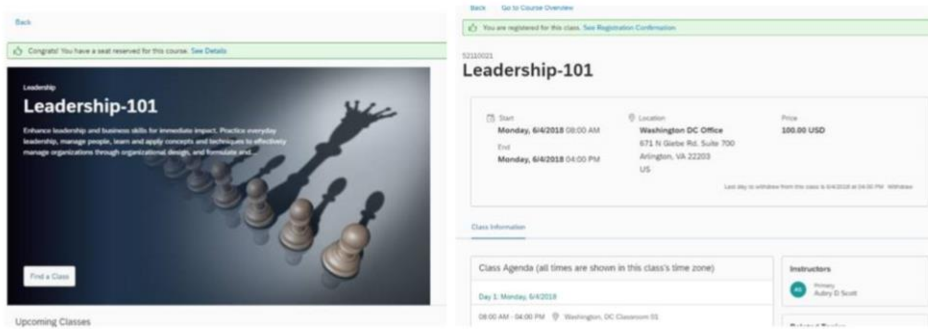
My Learning Assignments: Register into a Class (Scheduled Offering) 4/4



My Learning Assignments: Request Approval to Register (or Withdraw) for an Offering 1/2

In some cases, you may want a user to get approval before registering for a scheduled offering or before they can successfully withdraw from an offering in which they self-registered. You can define an approval process with just one approver, such as an immediate supervisor, or you can define a more complex set of approval steps.

My Learning Assignments: Request Approval to Register (or Withdraw) for an Offering 2/2



Approvals: Define Approval Roles

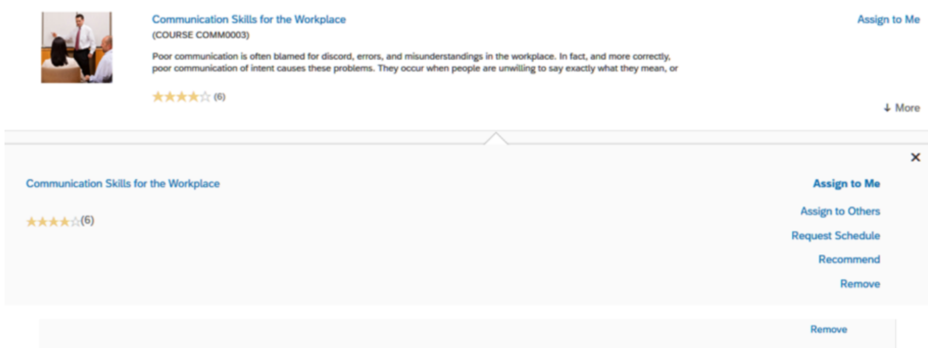
If the User is requesting an approval to attend a Scheduled Offering or launch an Online Item, the *Approvals* work area will allow him to monitor his request. If the User is involved in the approval process (has been assigned an approver role), the User is able to approve or deny the request from the Approvals area.

The system contains a role for supervisor level 1 (immediate) and level 2 (the supervisor's supervisor); however, all other approval roles need to be created and assigned to the appropriate user(s). For example, if the level 1 supervisor AND a Training Coordinator must approve registration in a scheduled offering for item XYZ, you would need to:

1. Create an approval role for Training Coordinator
2. Associate the role with one or more user records
3. Create an approval process with supervisor level 1 as Step 1 and Training Coordinator as Step 2
4. Enable this approval process when you create a scheduled offering for item XYZ
5. When a user requests approval to attend the offering, the request is first routed to the supervisor. If approved, the approval is next routed to the Training Coordinator.
6. If there are multiple Training Coordinators, you select the routing based on one attribute of the user record. (More on that later.)

My Learning Assignments: Request that an Item be Scheduled 1/2

Users may use the Request Schedule feature if there is no existing schedule offering in the catalog. The request is stored in the system with the user name and the item requested.



My Learning Assignments: Request that an Item be Scheduled 2/2

An admin can:

- Get automatic notification when X users (defined in minimum registration) have requested an item
- Search for users who have requested an item
- Run a user requests report
- Notify users who are on the request list that new offerings have been created. **Note:** If configured, an automatic process can be scheduled to notify users on the request list automatically when offerings have been created.

Request Schedule: Enable User Requests (Global)

You can enable the request schedule option to be available by default for all items. Then an admin can disable the option for individual items if desired. Disabling the option hides the **Request Schedule** button from users.

My Learning Assignments: Launch an Evaluation Survey

You may want to gather feedback that helps determine the effectiveness of training. Upon completion of a learning event, the system can automatically assign a user:

- 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)

The facilitator will launch an assigned survey and demonstrate the user steps to complete and submit the evaluation.

Evaluation Assignment: Select Completion Status

In a later section, you will learn more about the data collected when recording learning history. At that time, you will see that there are configuration decisions related to completion status.

As you define each completion status, you will decide whether the status should trigger an automatic assignment of each type of evaluation. For example, you may not want to assign a follow up survey for an unsuccessful completion (a failure or an incomplete).

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My Learning Assignments: Display Curriculum Requirements

My Learning Assignments also displays curriculum requirements. A curriculum requirement is configured by an admin and typically offers the user a choice in how it may be completed. Different users may choose to complete the same requirement differently and it will be considered complete so long as the rules of the requirement are met. This can be used when electives are desired.

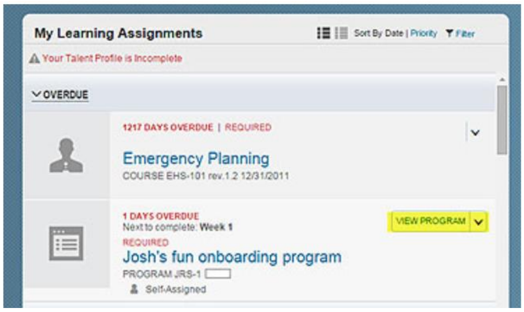
There are three requirement types: *Hours of specified Hour Type, Hours of specified Hour Type from Pool of Items,* and *Items from Pool of Items.*

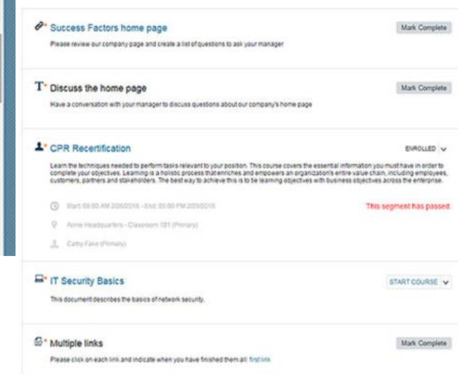
Each requirement displays the requirement type, priority, call-to-action button to choose courses (items) that fit the requirement, a link to quickly view the curriculum and when the next action is due.

Note: Whenever the user is offered a choice of items, they may only select items that have been placed into their catalog.

My Learning Assignments: Display Program Details

Program details may be expanded to display the current section of activities for which the user may need to take action. Actions may include launching an online item, marking a text or link activity complete, or enrolling in a scheduled offering for an instructor-led item.





My Learning Assignments: Access Mobile Learning 1/2

Mobile Learning provides a convenient and easy way to deliver capabilities directly to employees and managers via their mobile devices.

Users who log in to Mobile Learning can:

- View My Learning Assignments (cannot remove items), Filter by Assignment
- Filter content in catalog
- View item details
- View available scheduled offerings for items currently assigned to the user
- Launch online content
  - AICC and SCORM content (not SAP SuccessFactors exams)
  - HTML web pages
  - PDF, Word, PPT files (as supported by the user's mobile device)
  - Download eLearning items offline to their mobile device
  - Open, download, and play content hosted on iContent
- View custom certificate of completion
- Receive follow-up surveys

My Learning Assignments: Access Mobile Learning 2/2

- View and register/withdraw from scheduled offerings
- View and approve/deny learning approvals
- View and complete observation for task-based items
- Pause and resume download automatically in iPad
- Use e-signature
- Use catalog search for iPad native app (requires BizX app)
- View Learning History for iPad native app (requires BizX app)

The facilitator will demonstrate access to the learning plan via Mobile Learning. For example, you can see the steps for an observer to record a user’s attempt to perform a set of assigned tasks.

Note: You must enable Mobile Learning to make the functionality available to users. Please visit SAP Help Portal for additional information on mobile features (https://help.sap.com/viewer/index)

My Learning Assignments: Locate a Learning Item for Related Goal

For customers who use the Career Development Planning (CDP) module, users can add goals related to their development plans.

Users can add learning activities that help them achieve a goal or meet a rating for an assigned competency.

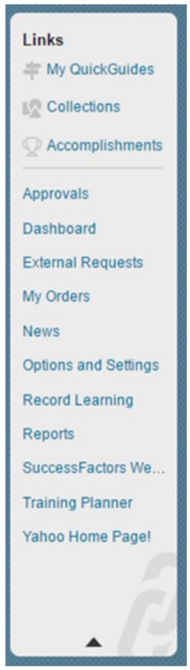
When the user completes the learning activity, the development plan status can be updated automatically.

Links Tile

The **Home** page contains a tile with **Links** that support easy navigation to additional user-side functions. The user can access pages both inside and outside the LMS quickly and easily. Display of each link is controlled by workflows (permissions) in the user's User Role.

Some popular links to functionality include:

- My QuickGuides – users can create multipage job aids with text and images and upload and share them with other users through the catalog and by recommendations.
- Collections – users can create lists/groups of links and online items and share them with other users through catalog and by recommendations. Collections may also be created by Admins and recommended to users with an Assignment Profile.
- Accomplishments – users can set learning goals against the topics that interests them, and be able to track the progress. Accomplishments allow users to access the information about the number of courses completed per month, total learning time per month or time spent by topic.
- Approvals – supervisors and other users who are approvers will see any pending approvals that await their decision.
- News – a configurable popup window that may appear when the user first logs in/authenticates to the user side. Admins may edit these User Introduction Panels and include text, images, and XML.
- Options and Settings – the user may edit their Learning Plan Notifications settings, (if permitted) set their locale, time zone, and locale formats. Supervisors may delegate permissions to other users to make them Delegate Supervisors.



Easy Links – Define Up to 10 Internal/External URLs

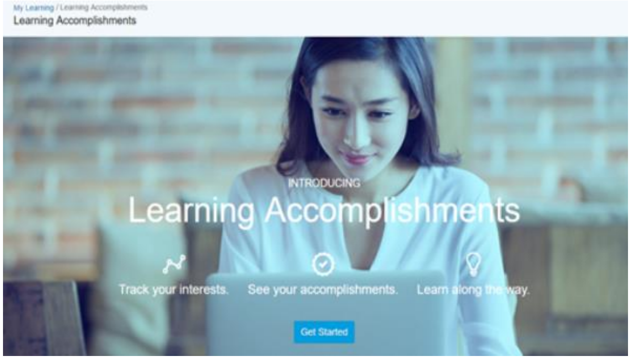
In addition to the standard links that appear on the Links tile for a user (depending on their user role), if configured, custom links to internal/external web pages (called Easy Links) may be available.

You can define up to 10 other Easy Links. Decide if you want to:

- Set up shortcuts to jump to other menus in the LMS.
- Create links to external sites that will open in separate browser windows.
- Limit use of each link to a specific set of users, based on user role (access to menus).

Accomplishments

The access to Accomplishments allows users to define learning goals against the topics that interest them (user can choose up to 6 topics). Once the learning goals are set, users can track the status of Learning Accomplishments with access to the following dashboards: number of courses completed per month, total learning time per month, or time spent by topic.



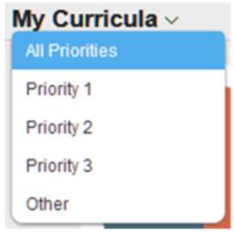
The access to *Accomplishments* is controlled by a workflow in User role (*System Admin* → *Security* → *Role Management*).

Options and Settings

The *Options and Settings* link gives access to manage and set their preferences (*Locale and Time Zone*, and *Locale Format* Options). It also permits the User to modify their learning notification and security options (password). If the User has subordinates, an additional section may be available which allows Delegate Supervisors to be selected.

My Curricula Tile

The **My Curricula** tile shows a color-coded snapshot of status for all assigned curricula. The user can click the pod to drill down to details on the related items.



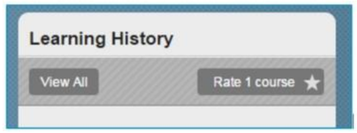
Administrators can assign a priority level to curriculum. Levels are numeric, and globally configured up to "10". This helps end users to prioritize their curriculum assignments.

Priority levels can also be assigned to Assignment Types in order to help users prioritize their Item assignments. **My Learning Assignments** can be grouped by priority.

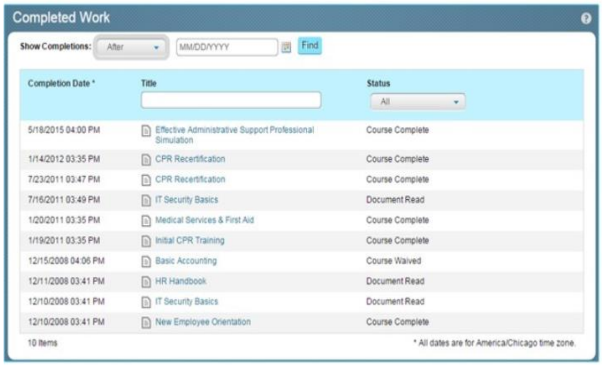
The *My Curricula* tile opens the *Curriculum Status* page with a list of all the curricula that are currently assigned to the user and the status of each. For detailed information, the user may click the title of any curriculum.

Learning History / Completed Work Tile

Users can access their **Learning History** by clicking the **History** tile to view, search, and sort for completed work. The tile displays the number of recently recorded completions. If there are completed items that are awaiting the user's rating, the tile will display a link which will lead directly to those items so that they may be rated.



Clicking the **View all** link will take the user to their **Completed Work** page.



If configured, a user can record completion of items directly from the History tile by selecting **Add** from the History menu.
Users can print a certificate of completion for successful events.
Certificate Templates may be created (by admins) and applied to different items and offerings in the system.

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My Employees Tile (for Supervisors)

Users who are also supervisors will have access to the *My Employees* tile. On the *My Employees* screen, a supervisor may:

- Click the name of one of the subordinate users and view the Learning Plan
- Click the arrow next to a subordinate who is also a supervisor and see the users who report him or her and view their Learning Plans
- Browse the catalog and assign or recommend learning to subordinates
- View the curricula of each user and their statuses
- Use the Supervisor Links to:
  - Assign/Remove Learning
  - Record Learning
  - Register/Withdraw Employees
  - Approvals
  - Dashboard
  - Organization Chart
  - Reports

The specific links and tiles that supervisors see depend on their user role.

Record Learning

This wizard allows a User to self-record a learning event for external events and any catalog items that have been configured for self-recording.

Note: To record a learning event for subordinates, a supervisor needs to access the Record Learning tool from the Supervisor interface.

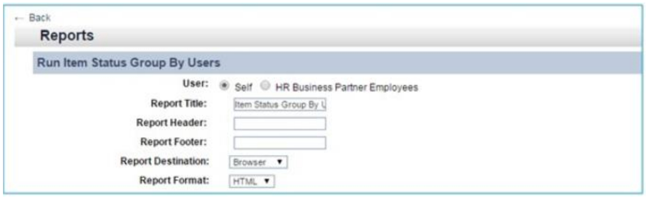
An approval process can be configured to require approval for self-recorded learning. Admins can make a choice whether to require approval only for internal (item-based) events, or also for external events.

Reports

User reports are run from the *Reports* link on the *Links* tile. Users, who are not also supervisors or a Human Resources Business Partners (HRBPs), may only run reports on their own history or assignments.

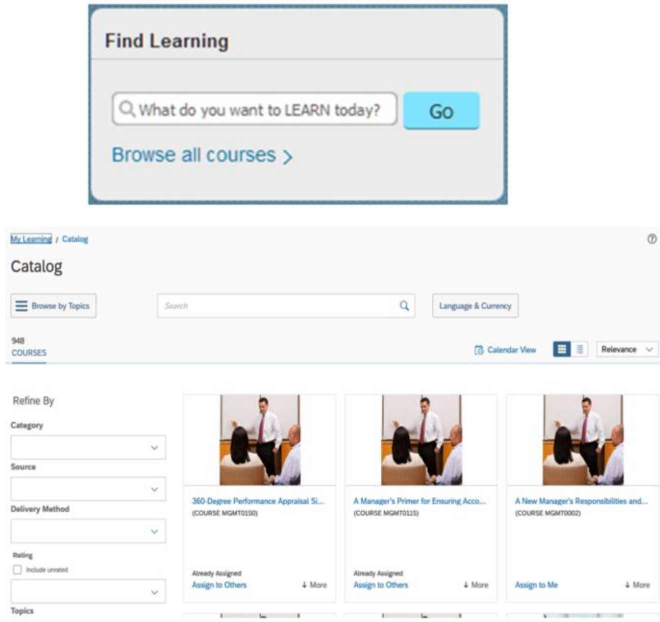
Supervisors may choose to run the report for: *Self, Direct Subordinates, All Subordinates*, or *All* (everyone including themselves).

HRBPs may choose to run reports for: *Self* or their *HR Business Partner Employees*.



Find Learning Tile (Catalog Search and Self Assign) 1/4

From the Home page, a user can search for learning using the Find Learning tile. Enter keywords into the text field and click **Go**. Or click the **Browse all courses** link to access the course catalog in SAP SuccessFactors Learning, as shown in the figure. Users may search for items, curricula, programs, collections, and quick guides to self-assign. If self-registration is permitted, the user can enroll into an available scheduled offering.



Find Learning Tile (Catalog Search and Self Assign) 2/4

Catalog Browse:

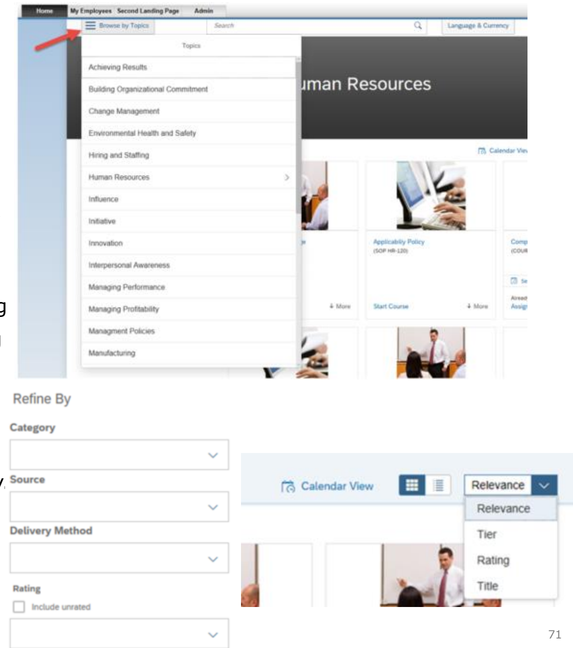
Users can browse the catalog for items based on **topic** (subject area). This option gives the user cues about the goals of training or for which audience the course is intended.

Additionally, users may filter their search by language, currency category, source, delivery method, and average rating.

A user may filter the Scheduled offering search by date range and location (facility) or choose to display upcoming offerings in a Calendar View.

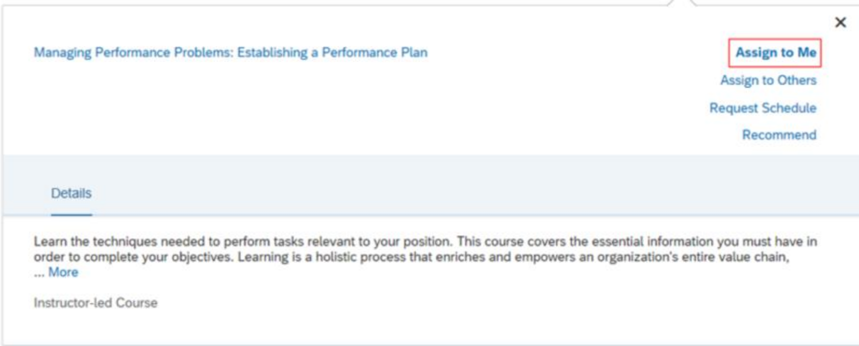
Globally, the default catalog search results may be sorted for all users by relevance, rating, title, price, or tier. The user may choose one of these and change their own search results display.

Consider how your company might use topics and other references to permit users to find learning items easily.



Find Learning Tile (Catalog Search and Self Assign) 3/4

In the search results, the user will see all the records that meet their specified criteria and filters. Action links will be available for self-assigning (Assign to Me) or assigning to subordinates (Assign to Others) if the user is also a supervisor or HRBP. Other actions might be available depending on whether the item is online or instructor-led and if there are scheduled offerings in the user's catalog already or if they may request them.



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Find Learning Tile (Catalog Search and Self Assign) 4/4

If the Open Content Network (OCN) is configured, the OCN Provider sources such as Coursera, Linked In Learning (formerly Lynda), Open Sesame, Open HPI, Harvard ManageMentor, Udacity, or edX may display as filters.

Begin to think about how your item data can be organized to assist users browsing the catalog.

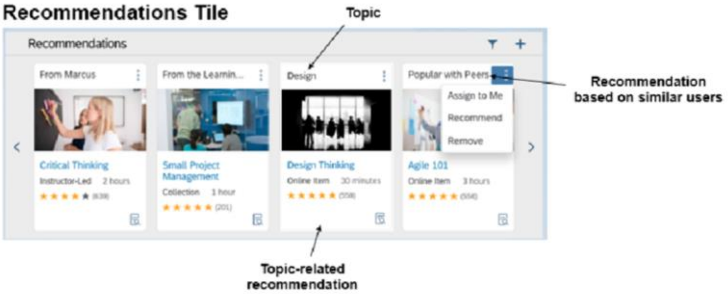
Once the desired learning record is found in the catalog, the user may self-assign it, or take another action (such as request schedule or recommend). Users who are supervisors may assign items, programs, and curricula to others (their subordinates). If permitted, they may register their subordinates into scheduled offerings from their catalog.

Recommendations Tile 1/2

The **Recommendations** tile, as in the figure below, provides users with a graphic display of recommendations from either their peers or administrators:

- **Peer recommendations** may include items, curricula, programs, or quick guides that their peers found in the catalog or were assigned to them.
- When recommending training content, users can search for their peers and determine the appropriate peer by matching either their External ID, Organization description, or email address (globally configured) in the type-ahead.
- **Admins** may add Recommended Items to an assignment profile so they will display here for all users who meet a certain criteria.
- Admins may create external links and recommend them to a group of users.
- **Popular with Peers**: Relevant learning based on the learning history of similar users.
- **Topic-related recommendations**: Relevant courses related to user's topics of interest.

Users may see information about each recommendation such as who recommended it, the title and description, duration, and rating if available. The user may decide to dismiss the recommendation, bookmark it, or self-assign it.

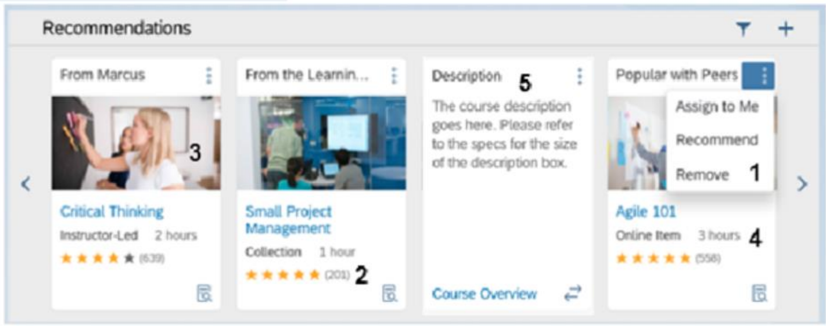


Recommendations Tile 2/2

While viewing a recommendation, the user may see why it was recommended (and by whom). They may dismiss the recommendation by indicating they are not interested and it will be removed from the **Recommendations** tile.

The user can also accept the recommendation by clicking on the title of the recommended Item, Quick Guide, Collection, External Link, Curricula, or Program and adding them to the learning plan. This may result in removing the recommendation from the **Recommendations** tile.

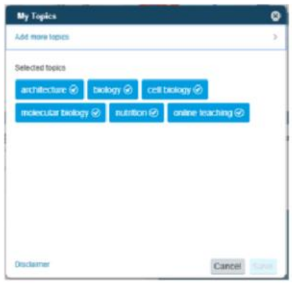
Admins or peers may create groups of links and online items called Collections and recommend them to users. The recommended item, curricula, or program must be in a catalog that the user receiving the recommendation can see.



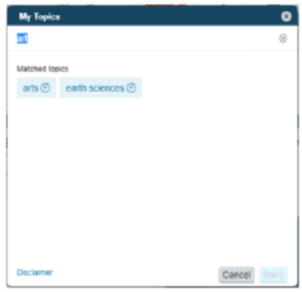
Recommendations Tile: Personalized Recommendations

- Personalized learning recommendations enables users to find relevant courses from their learning catalogs without needing to search through the catalog.
- The recommendations engine:
  - Uses Learning History Data, User Profile Data, User Custom Columns, and User Activity Data to personalize recommendations.
  - Applies **text analysis** to the **Item Title, Description, and Subject Area** to **automatically generate Topics** related to the course.
  - Users can search through available topics and subscribe to topics of interest.
  - **Recommendations Newsletter** includes Personalized Recommendations, in addition to Peer Recommendations and Assignment Profile Recommendations.

User Subscribed Topics



User searches for topics of interest



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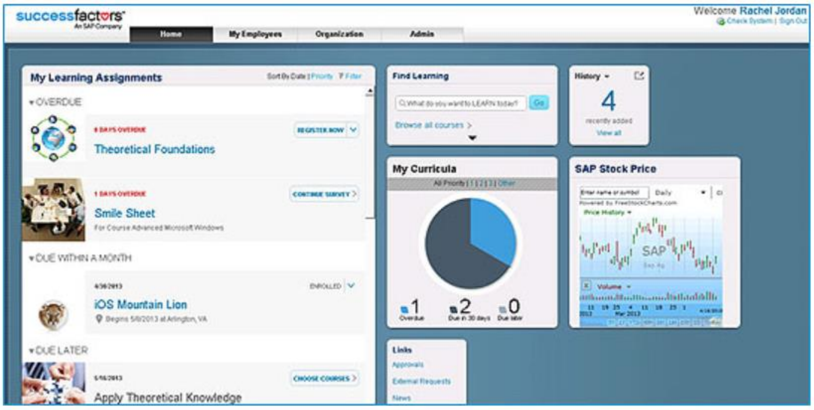
Home Page > Custom Tiles

Administrators can add custom tiles to one of the Learning landing pages. The custom content tile tool has a rich text editor the admin can use to create media rich tiles. Admins with experience in web design can switch to code view and enter custom HTML.

Admin can further personalize the landing page by creating custom content tiles for specific organizations or Groups of Users (defined by an Assignment Profile) as well as define specific dates when the tile will be displayed.



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Tiles, Links, Landing Pages, and User Roles 1/2

You can disable any of the tiles that would not be meaningful or relevant for your users.

What tiles should be enabled for your users?

- My Learning Assignments
- My Curricula
- Learning History
- Find Learning
- Recommendations
- Self-Assigned
- My Employees
- Custom – What content? Who? When?

Note: If the Self-Assigned tile is enabled, items that are self-assigned will only appear on this tile and not in the My Learning Assignments list as well.

Tiles, Links, Landing Pages, and User Roles 2/2

Links to enable:

- My QuickGuides
- Collections
- Approvals
- External Requests (U.S. Government SF182)
- News
- Options and Settings
- Order Status (Commerce)
- Order Tickets (Commerce)
- Record Learning
- Reports
- Training Planner (for budgeting and time planning)
- Easy Links (custom links)

Supervisor Interactions

A supervisor is a user who has access to their subordinate's user records. A supervisor is able to view all of his/her employees' training information.

The facilitator will demonstrate key actions that supervisors may be able to perform:

- View assigned training, curriculum status, and overdue learning for their employees.
- Assign items and curricula.
- Register users into available scheduled offerings.
- Record completions for subordinates.
- Run reports for direct and indirect subordinates.
- Delegate responsibilities to other users.
- Assign alternate supervisors for their subordinates.
- Review training requests (as a Training Manager).

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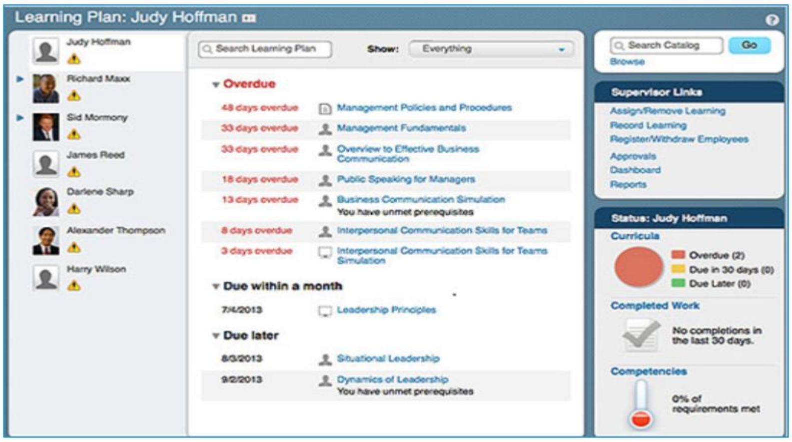
Supervisor View of My Employees

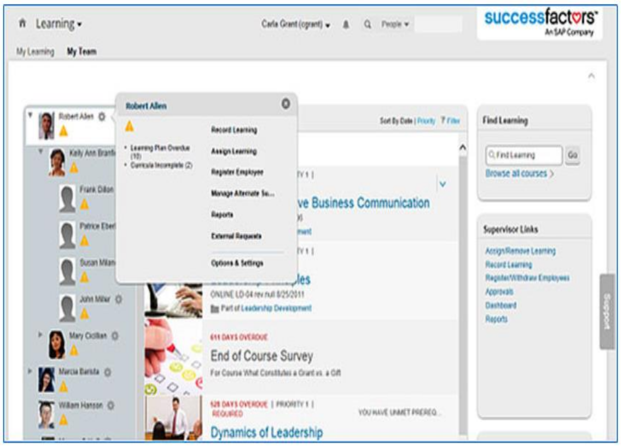
The My Employees screen provides a workspace to access team members’ records. From here, supervisors can:

- Access the team viewer
- View employee’s Learning Plan
- Take various actions using the supervisor links



Supervisor Links and Actions

When viewing an employee in the **My Employees** screen, supervisors can access functions for each employee.

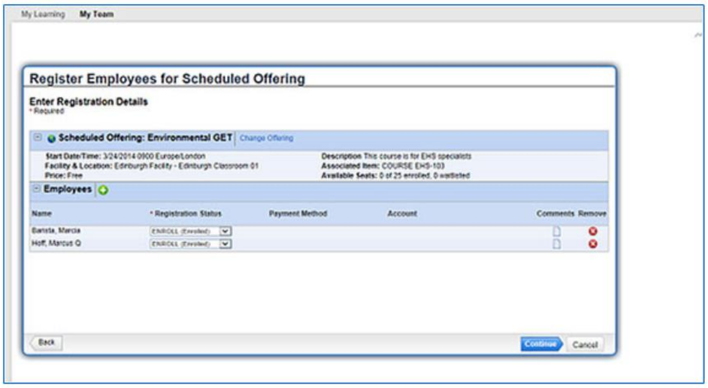


Supervisors may also take action from the links in the **Supervisor Links** tile.

Supervisor Registration Tool

The Supervisor Registration Assistant assists organizations with supervisors who enroll users into scheduled offerings. Supervisors can register users into scheduled offerings through the registration assistant. When a supervisor clicks Register/Withdraw Employees, the registration assistant opens. The registration assistant supports:

- Registering users into scheduled offerings that have not started yet
- Withdrawing users from scheduled offerings
- Registering users into scheduled offerings that have a price (supervisors can use slots, order tickets, and account codes)
- Notifying users, instructors, supervisors, and others of the enrollment or withdraw



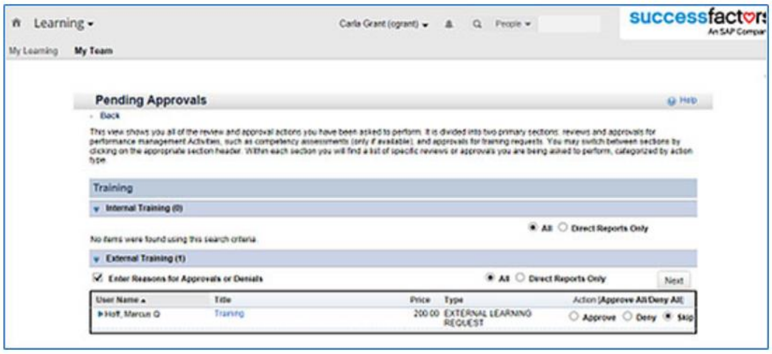
Managing Training Approvals

Supervisors can approve or deny training requests from other users. This may include requests to register into a scheduled offering, withdraw from one, or to launch online content.

Other users who are not supervisors can also participate in the approval process if an admin assigns them an approval role.

When employees first submit the approval request, they see a status of **Pending Approval**. Approvers can view, approve, deny, or skip their requests. The employee receives email notification for approved or denied requests, listing the reason provided by the approver.

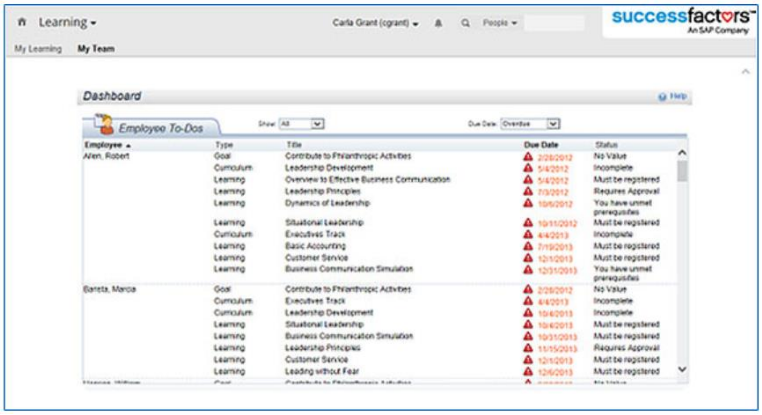
When the last person in the process approves the request, the employee can register for the requested course or launch the online content.



Supervisor Dashboard

Selecting the **Dashboard** from the Supervisor Links provides a quick glance at upcoming training that might be due for your employees. This dashboard defaults when you come into this screen to show you the list of any of your employees that are overdue on training.

The dashboard may be used to forecast training completions within the next month or two.



Supervisors Can Run Reports

Supervisor can run reports about for themselves and/or direct and indirect reports.

Supervisors Can Identify Delegates

The supervisor delegation feature enables supervisors to identify other users with supervisor responsibilities.

Supervisors use this feature to identify other users to act on their behalf. For example, the supervisor is taking an extended holiday or cannot access the user interface. Delegate supervisors will be responsible for all of the supervisor's subordinates but may have some or all of the same permissions as the supervisor.

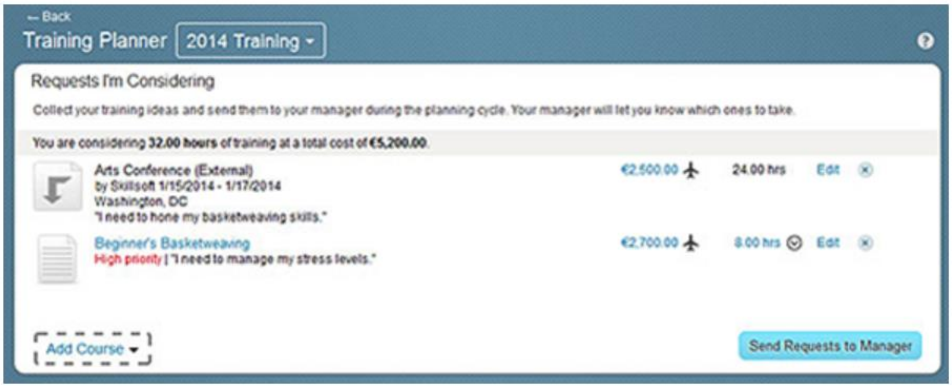
Supervisors Can Identify Alternate Supervisors

Users might work for an extended period on projects that have them reporting to a different manager or supervisor. In this case, the supervisor (or an admin) can add up to 10 alternate supervisors. Either alternate or primary supervisors can complete the primary supervisor's tasks.

Alternate supervisors cannot remove themselves. An administrator can remove any alternate supervisor and primary supervisors may be allowed to remove alternate supervisors for any of their subordinates.

Supervisor Actions: Review Training Requests

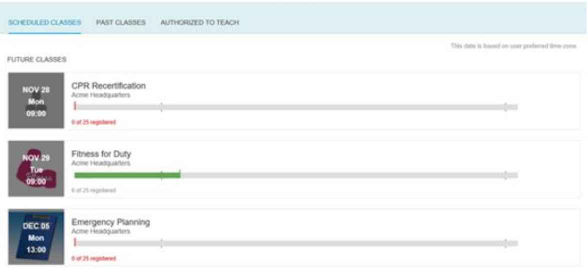
Users and supervisors can submit training requests, which are reviewed by a designated Training Manager in the **Training Planner**. The Training Manager can restrict an organization’s training budget or the number of employees a supervisor may send to a particular course.



Instructors: My Classes

Users, who are also identified as instructors in SAP SuccessFactors Learning, will have access to the **My Classes** tab. On the **My Classes** screen, an instructor may:

- View their scheduled courses
- View details on a selected course including associated documents
- View students who have registered for the course and print a roster (which can be either a standard or globally-customized roster)
- Communicate with students via email
- Record completion for the course manually (electronic signature information may be captured if enabled)
- Record completion using QR codes
- Record completion for Ad Hoc events (that have not been created as scheduled offerings)
- Add walk-in students who are not currently on the list of registered users (so long as the offering is currently in progress and has no charge)
- Initiate training evaluations (prior to recording completion for offerings)
- Select registered students for evaluation on an individual basis
- Update and View VLS Accounts
- Launch virtual sessions (VLS)
- View segment details
- Track segment attendance



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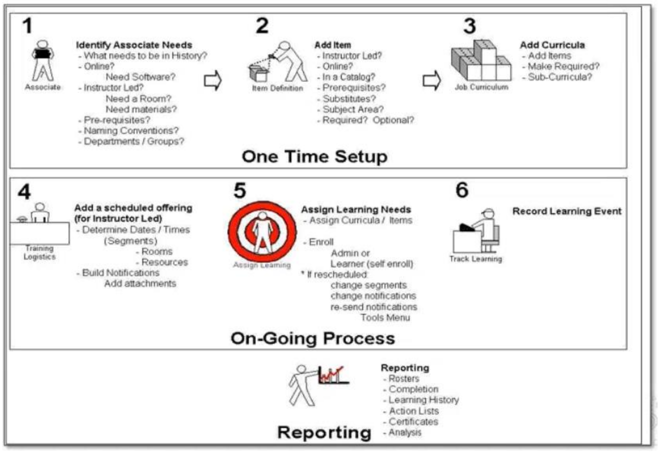
Human Resource Business Partners (HRBPs)

Human Resource Business Partners (HRBPs) are typically part of larger organizations. They assume some responsibilities of supervisors so that supervisors can address the core needs of the team. In SAP SuccessFactors Learning, they are alternate supervisors: people who you can delegate training responsibilities to (for example, assigning training or approving training).

HRBP-User mapping is managed in the system via the User Connector. HRBPs can manage their employees via an interface similar to the Supervisor interface. They can view the list of all employees they are managing, browse their learning plans and perform actions such as Assign/Remove Learning, Record Learning, and Register/Withdraw for their users.

The Admin Experience: Administrator Interface Overview

The user and administrator applications are fully integrated into one common interface. Your role will determine what you have the ability to do as an administrator. The admin experience can be personalized for your own preferences.



Administrator (Admin) Screen Layout

There are four main sections of the admin screen, as shown in the figure:

- Top menu frame
- Left menu frame
- Content frame
- Bookmarks and Recents Panel

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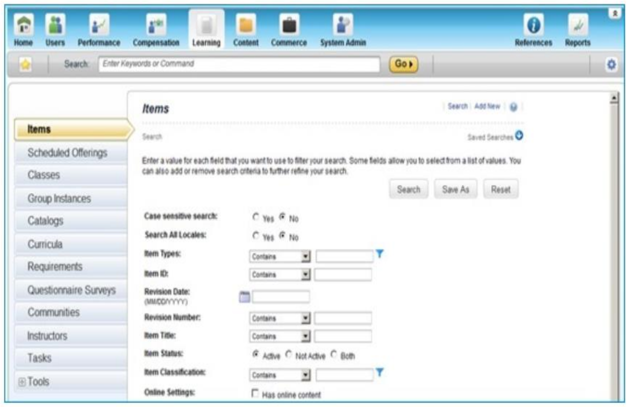
Top Menu Frame

The top menu frame (main menu) contains buttons to the main functional areas in SAP SuccessFactors *Learning*.

Note: Your functional area buttons may differ depending on the workflows and roles you are associated with.

When a button is selected from the top menu bar, its available options are displayed in the left menu frame. For example, to access an item you must navigate to *Learning* > *Items*.



Top Menu Frame

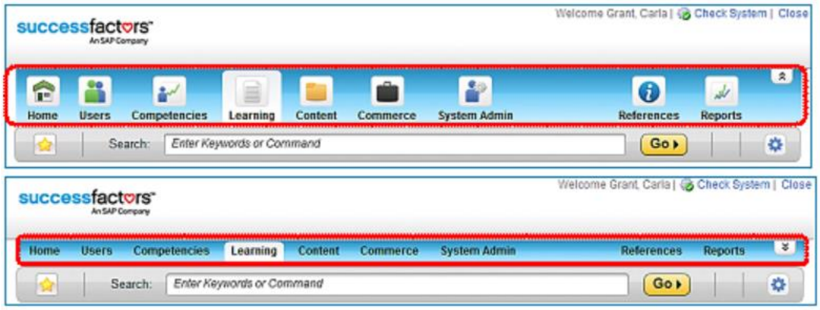
Also, in this top frame, admins can access references, reports, and preferences:

- Click *References* to manage the referenced fields that are used throughout SAP SuccessFactors Learning, including calendars and time, geography, and physical resources. This overlay menu is accessed from any screen in the application without having to navigate to a separate screen.
- Click *Reports* to manage reports, including:
  - Searching for and running reports
  - Changing the description of reports
  - Importing and exporting reports and libraries for customization in Report Designer
  - Publishing and unpublishing reports

Note: The actions that you can take in the reports section are controlled by workflows.

Top Menu Frame

- Click Collapse( ) /Expand ( )Main Navigation buttons to collapse or expand the button bar

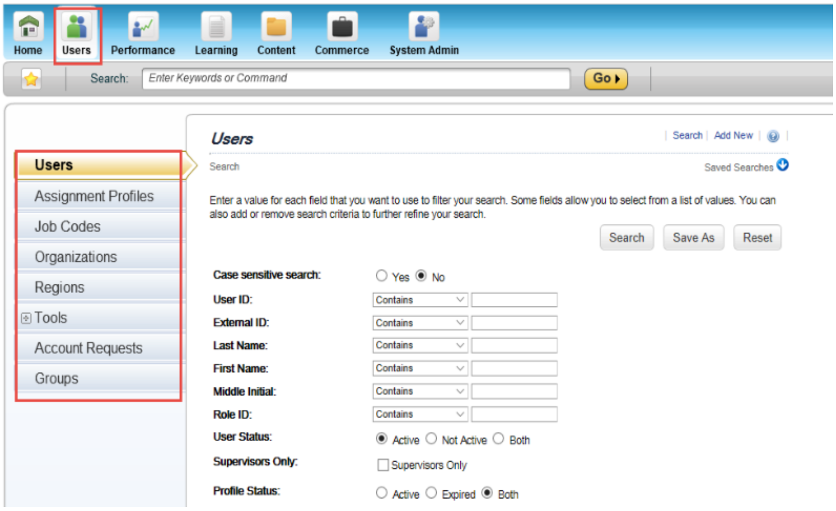


- Click the Preferences ( ) icon to change your locale (language, date/time format, etc.) and time zone settings, reset your e-signature personal identification number (PIN), and reset your password and security question/answer

- Click Close to end the current session or navigate to another part of SAP SuccessFactors HCM by using the dropdown menus at the top of the screen

Left Menu Frame

A related set of menu options display in the left menu frame, based on the button clicked in Top Menu Frame. If a menu item has subsections within it, a plus (⊞) is displayed.



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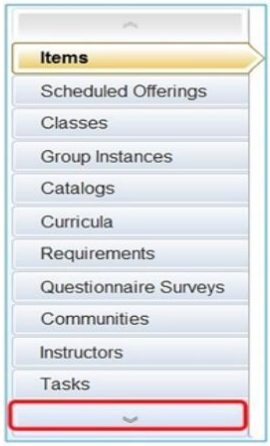
Left Menu Frame

Click the up and down arrows in the left menu to see additional left menu options.

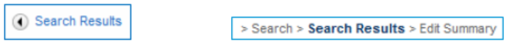


Click ⊞ to expand that menu option. The ⊞ changes to ⊟ and the expanded menu options are displayed. Only one menu item can be expanded at a time.

Content Frame

When a left menu option is selected, the corresponding screen displays in the content frame. This is the working area where searches are conducted to retrieve, view, and edit records.

There are two features on most pages in the content frame:



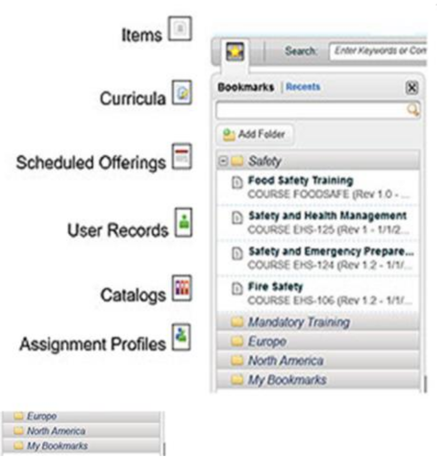
Breadcrumbs display at the top-left corner of the content frame and identify the area, section, subsection (if applicable), tab, and mode currently open. Breadcrumbs may contain active links that facilitate navigation to previous screens.

The *Help* icon displays at the top-right corner of each content frame. Clicking this icon displays context-sensitive help for the specific section currently open, and opens the online help with access to contents, index, search, and the system glossary.

Bookmarks

Bookmarks provide a way to organize records that admins access or modify most frequently. This menu can be organized with a folder structure defined by the individual admin. This skips the step of repeatedly searching for commonly-accessed records and provides quick access to them.

Administrators can bookmark the following:



Exam-type Assessments

Quiz-type Assessments

To bookmark a record, click the star icon next to the record in the search results list or choose the Bookmark option from the Actions section or menu. The details page displays pertinent information for the selected record.

Recently Accessed Records

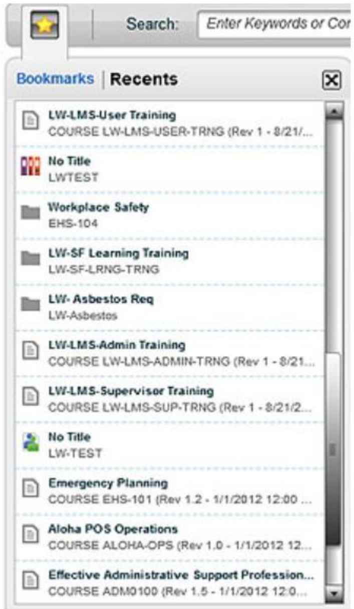
The **Recents** panel shows records accessed most recently at the top of the list. Finding records that were recently accessed allows administrators to return to previously viewed records much faster.

Entities that may be bookmarked also appear in Recents when they have been accessed by an Admin. Additionally, Programs will appear here with this symbol:

Navigation – Configure Recents List

The number of records that the Recents panel shows for all administrators is configured globally and is usually defaulted to 50.

Determine the best number to set for recently accessed records. Default is 50; you can display up to 100.



Recently Accessed Records

The system places a record that you accessed at the top of the list when you:

- Add a new record
- View or edit a record from a search result
- Access a record from your bookmarks
- Access a record from the Recents panel

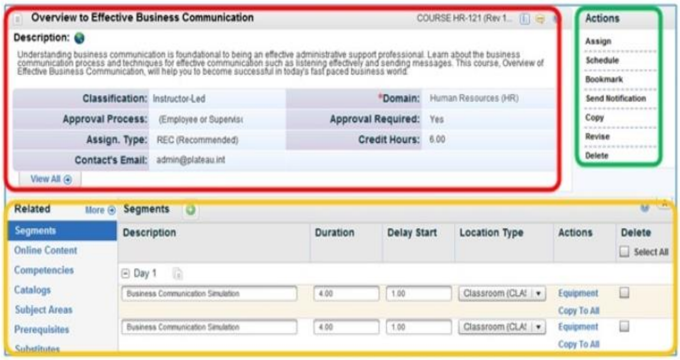
For example, if you directly assign an item to the user record (*Users > Users > Assigned Items*), then the system adds the user record to the Recents panel (because you are editing that record).

Note: The records that may be listed in the Recents panel include: *Items, Curricula, Programs, Scheduled Offerings, Users, Catalogs, Assignment Profiles, Exam and Quiz - type Assessments, Coupons, Purchase Orders, and Subscriptions.*

Layout of Some Learning Records

The screen layout of some learning records contains three main areas in the following figure:

- Core (red outline at the top left) (also called the Summary tab)
- Related (yellow outline at the bottom half)
- Actions (green outline at the top right)



The Core area (or Summary tab) contains summary information about the record. Click View All to display the Additional Settings page of the entity record.

To edit any field in this area or Additional Settings page, click in a displayed field and enter text or select a reference value (depending on the field type).

- The Related area contains additional information regarding the entity record.
- The Actions area includes links for you to take additional actions on the record.

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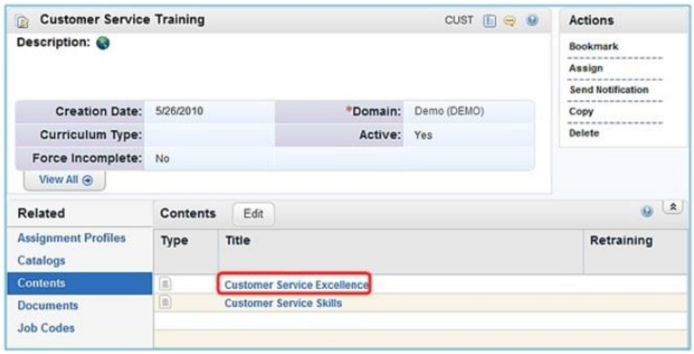
Cross Entity Linking

When accessing any record, users frequently see related associations that they would like to investigate more fully. Cross entity linking makes each association a hyperlink and takes the user to the record in question. This means less searching and more efficient use of time. For example, within a curriculum's *Contents* tab from the *Related* area, an admin can select an item title and go directly to that item's record.



Searching

The search feature is critical to most workflows in the system, including viewing records and using wizards. Use the search feature to:

- Create and delete a search filter.
- Add and remove criteria from your search filter.
- Adjust the display of your search results.
- Save your search to use later.
- Sort your search results.
- Download search results to Microsoft Excel

Note: You can also use the *User Viewable Domains* filter found under your Preferences section to further refine the results of your search. Your selected user-viewable domains are listed in the domains drop-down menu.

Searching Criteria

Searches are filtered criterion-based queries to locate and access data within SAP SuccessFactors Learning. By entering search criteria, administrators can search for different types of results. On each search page, you will most likely see the following terms in the drop-down menu associated with most entities in your search criteria.

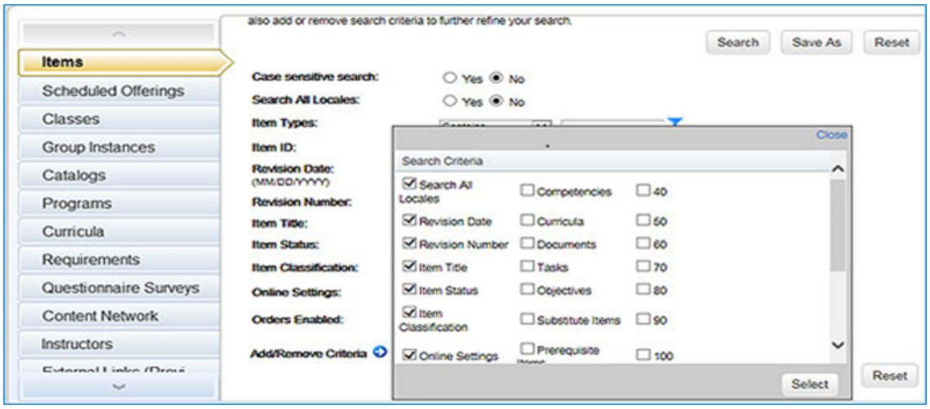
Select:

- *Exact* if you know the precise ID of the record. Enter the exact record ID and click *Search*. Only one value can be entered into the search field.
- *Any* to use multiple exact ID's or descriptions of the record. Enter one or more criterion separated by a comma and click *Search*. For example, if searching for all user records containing the last name **Smith** or **Smithfield**, enter the exact first names separated by a comma, select *Any* from the drop-down menu, and click *Search*.
- Starts *With* if you know the first part of an ID or description. Type the first few letters or numbers of the record and click *Search*.
- *Contains* if you know any part of the record ID or description. Enter the part of the ID/description you know and click *Search*.
- *Does Not Contain* if you know the ID or description does not contain a certain letter or number. Enter that text in the textbox and click *Search*.
- *Is Empty* to return all records where the specified field is empty. For example, if searching for all items without a title, select *Is Empty* for the item title criteria and click *Search*. This operator is only available in non-required fields.

Searching Criteria

You can choose whether you want your search to be case sensitive by setting the *Case sensitive search* option. To do a non-case-sensitive search, select *No* (if that is not the default setting). Please note that a non-case-sensitive search may take longer.

You can also choose whether you want your search to include all available locales. When enabled, the search includes all locales in the keyword search for all data that has been localized.



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Saving Searches, Adjusting the Display of Search Results, and Downloading Search Results

Saving Searches

Admins can save a search filter and reuse the criteria specified in the search filter. The search filter is saved with the admin login.

Adjusting the Display of Search Results

Search results display the set of related entities that fit the search criteria. Admins adjust the display of your results using the Field Chooser.

Downloading Search Results

Once admins have the results, they can download the search results to an Excel file. Not all fields will download and custom columns are not included as a part of the download.

Decision: Search Configuration

The following is a list of decision points related to searching in the application.

- **Set maximum number of records to display per page.**
- **Set maximum number of records that can be downloaded. Default is 2000.**
- **Use the Default Search Operator or not.**
- **Are there any filtered fields that you would like to provide a pick list instead of search filters?**

(Note: This is recommended only for referenced fields with a small amount to choose from.)

Localized Fields

Fields that are localized (such as item title and description) will have a globe icon ( ) next to them. Clicking this icon permits the admin to enter a value for the field in each of the languages the customer is using.

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Commonly Used Search Icons

The following table lists the icons and their descriptions of the most commonly used search functions in SAP SuccessFactors Learning.

Icon	Description
	The **Select Date** icon is associated with the date field. Use it to select and populate the corresponding date field.
	Use the **Filter by criteria** icon to find and select a corresponding entity to include in your search filter.
	Use the **Clear Filter** icon to clear the content of your corresponding search filter.
	Use the **Search Picker** icon to select from a list or find and select the corresponding entity using a filter.

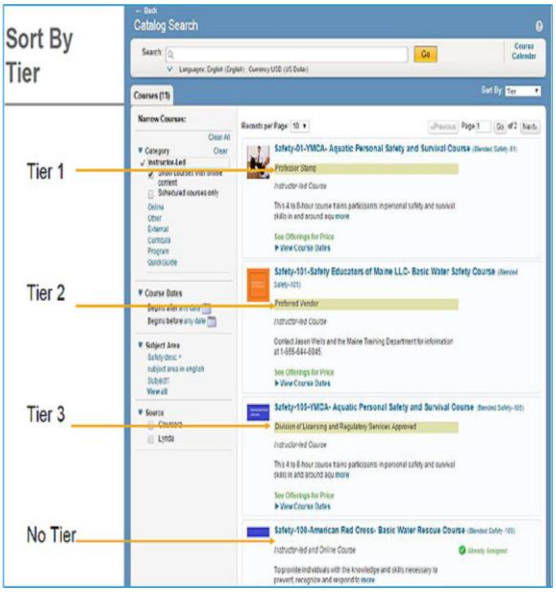
Job Aid: Searching.

Search Results Booster

Catalog Search Results Booster is a general term for ways that a learning administrator can raise the visibility of learning objects in users' catalogs. Admins may want to boost results when you have several courses that have similar titles or that contain the same key words, but you want to boost one of the similar courses over the other.

The Catalog Search Results Booster contains two mechanisms:

- **Search Weight:** You add a multiplier to individual curricula and learning items to increase the relevancy score. A relevancy score is the result of a search algorithm. You insert a multiplier to the algorithm.
- **Search Tier:** A search tier is a layer of results. One way to think about it is as a "group by" in search results. Users can sort by (group by) the tier and then sort within the tier by relevancy. Tiers are ordered 1-5.



Record Layout

During the configuration workshop, you will make decisions about the record configuration for several major entities:

- User
- Item
- Curriculum
- Scheduled Offering
- Assignment Profile
- Catalog

Record layouts are an important part of the configuration process and should be completed prior to Go-Live. With the record configuration you will be given the opportunity to:

- Show or hide fields within the record (including custom columns).
- Indicate which fields are required.

Record Layout Consolidation

Commonly used record types can be accessed in a consolidated format to view and edit. This allows better access to the information with commonly used information more obvious, and data accessed less frequently more recessed, to make the entire experience more intuitive. Information about how to globally configure records can be found in the online Help system under the *System Administration > Configuration section*.

In addition, the various associations themselves can be turned off to simplify the layout and remove unneeded fields and data from the interface.

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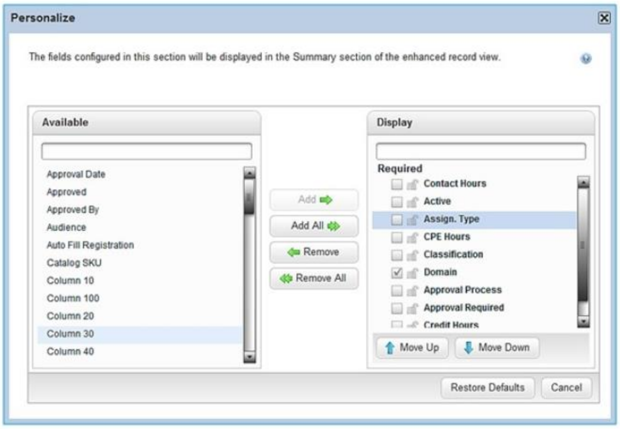
Record Layout Configuration (Personalize Fields)

In the Personalize pop-up window ( ), select one or more available fields from the left column. Click the Add or Add All button in the middle to add the selected fields to the Display column on the right. All fields listed in the right column will be displayed in the core area of the record. If you select the Required checkbox, then administrators are required to supply a value for the field.



In addition, the various associations themselves can be turned off to simplify the layout and remove unneeded fields and data from the interface.

Summary

In this lesson, you have learnt:

- Learning Terminology and Overview
- Learning Needs Management model
- Explain the process of implementing the model
- Identify and define the terms associated with the model
- Identify admins and users in SuccessFactors Learning
- Navigate within SAP SuccessFactors Learning as an admin
- Work with and organize bookmarks and recents
- Create search filters and search for records in SAP SuccessFactors Learning
- Download and view or save search results