



SuccessFactors (SF) Learning

Supervisor's Guide

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Glossary

ASSIGN <i>for online self-paced courses</i>	When you <i>assign</i> a course to an employee, it lets the employee know these are courses you want them to attend.
REMOVE <i>for online self-paced courses</i>	When you <i>remove</i> a course from an employee, it lets the employee know you no longer want them to attend that course.
REGISTER <i>for live scheduled courses</i>	When you <i>register</i> a course to an employee, it lets the employee know you signed them up for a specific scheduled course.
WITHDRAW <i>for live scheduled courses</i>	When you <i>withdraw</i> an employee from a course, it lets the employee know you no longer want them to attend that scheduled course.
CURRICULA	Required trainings with recurring renew date.
LEARNING	Any training that is assigned or registered to direct reports

My Team

As a supervisor, you will be able to view information about your employees via the "My Team" tile.

From the SF Learning home page, click on the "My Team" tile.

If you have multiple employees reporting to you, you must select the employee you want to review.

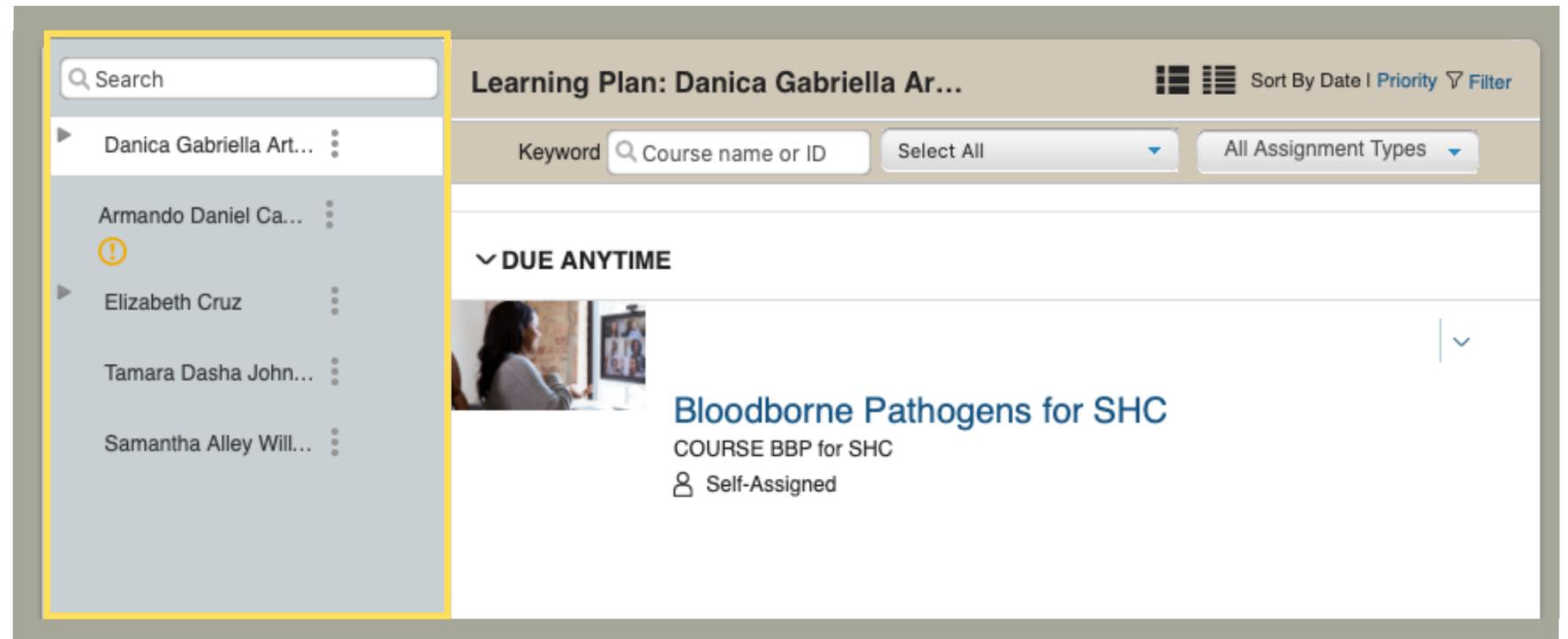
The screenshot displays the 'My Team' dashboard in the SF Learning system. At the top, there is a navigation bar with 'My Learning' and 'My Team' tabs. Below this, a message box reads: 'A Message for You... Welcome Employee Bobcats! We are excited to welcome you to SuccessFactors (SF) Learning - a new learning management system (LMS) dedicated to enhance employee learning for Texas State. This is an exciting time for learning and development opportunities. Happy Learning! Questions?'. To the right, there are two sections: 'Featured' with a star icon and a '2' badge, and 'History' with a circular arrow icon and a '1' badge. Below these is a 'Find Learning' search bar with the text 'What do you want to LEARN today?' and a 'Go' button. Further down, there is an 'Explore more...' section with the text 'Explore the upcoming courses available for you! ODC Course Calendar' and a link to 'About us: To learn more about the team, please visit Organizational Development and Communications or you can reach us at hr_odc@txstate.edu.'. The main content area is divided into two columns. The left column features a large 'My Team' tile with a green circle and the text 'On Time (4)'. Below this, there are two course cards: 'Building Supportive Communities: Taking Action' (COURSE ITM162) and 'Code of Conduct: Financial Integrity' (COURSE ITM80), both with 'START COURSE' buttons. The right column contains a 'My Curricula' section with a green circle and 'Due Later (3)'. At the bottom right, there is a smaller 'My Team' tile with a green circle and 'On Time (4)', which is highlighted with a yellow border.

View Assignments

After clicking on "My Team" you will navigate to the 'Learning Plan' page.

On this page, all employees that report to you are displayed in the column on the left. The first employee's learning assignments is automatically displayed.

To view other employee learning assignments, click the appropriate name in the column on the left.



The screenshot displays the 'Learning Plan' interface for Danica Gabriella Ar... The left sidebar shows a list of employees: Danica Gabriella Ar..., Armando Daniel Ca..., Elizabeth Cruz, Tamara Dasha John..., and Samantha Alley Will... The main content area shows a search bar for 'Course name or ID', a 'Select All' button, and a dropdown for 'All Assignment Types'. Below this, a section titled 'DUE ANYTIME' is expanded to show a course assignment: 'Bloodborne Pathogens for SHC', which is a 'COURSE BBP for SHC' and is 'Self-Assigned'.

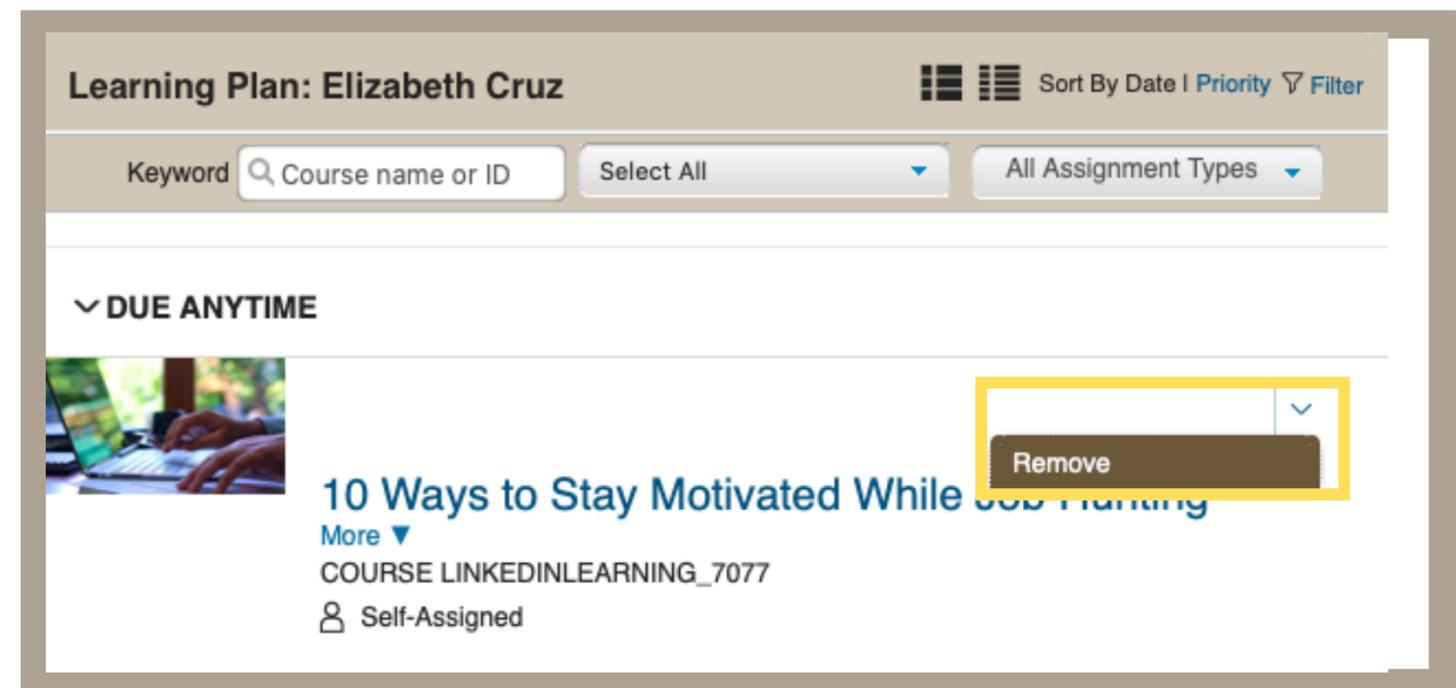
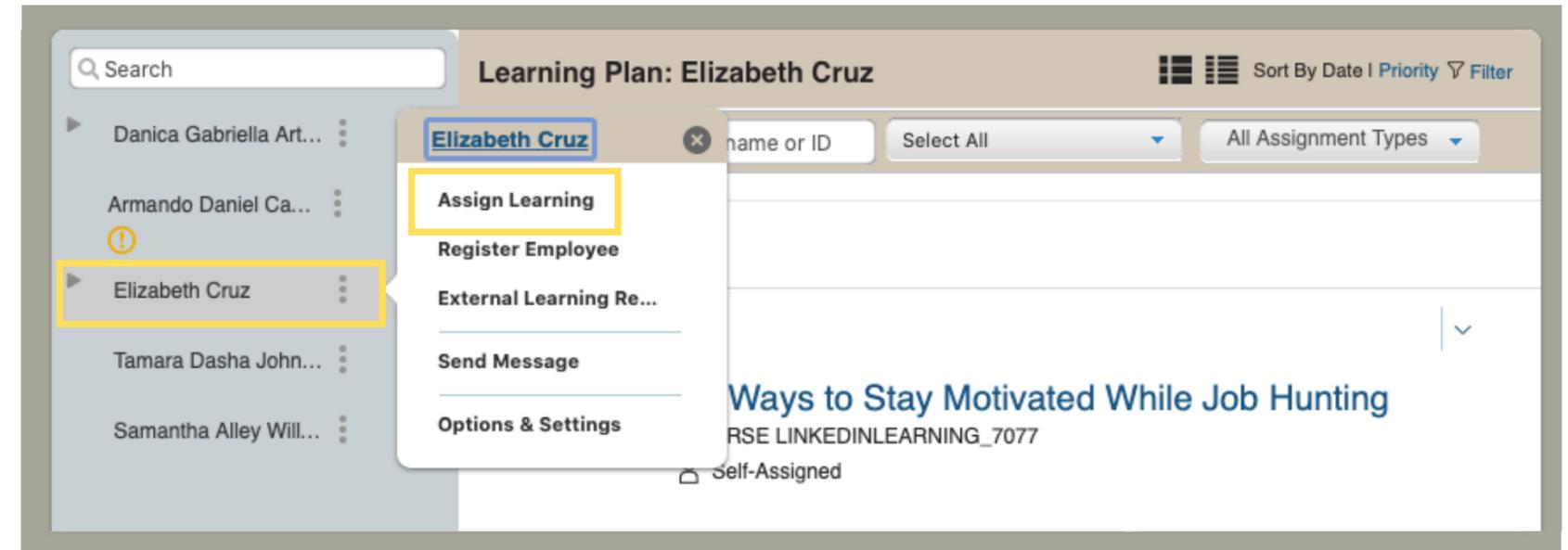
Assign & Remove

There are two ways to assign and remove learning to an employee. The first way is located under "Learning Plan."

Start by selecting the employee you want to assign learning to and click the three dots next to their name.

When the pop up box appears, click "Assign Learning."

To remove learning assignments click the drop-down arrow to select "remove."

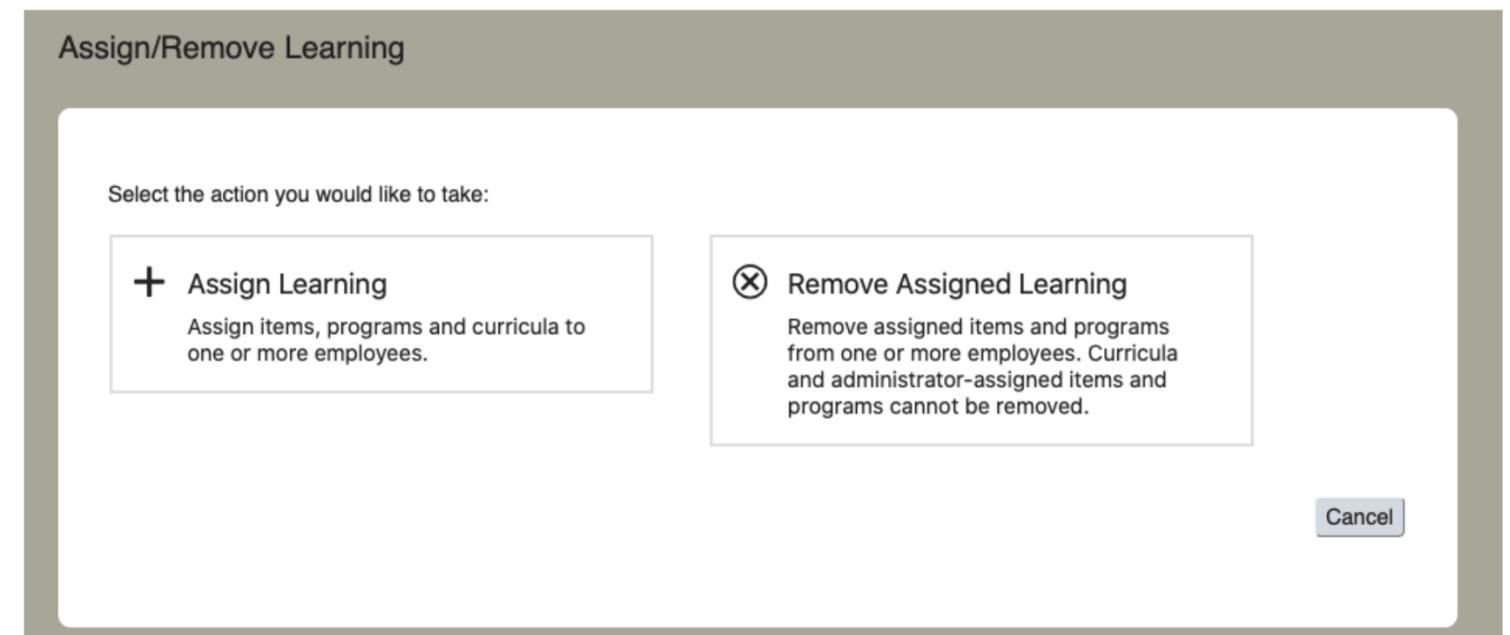
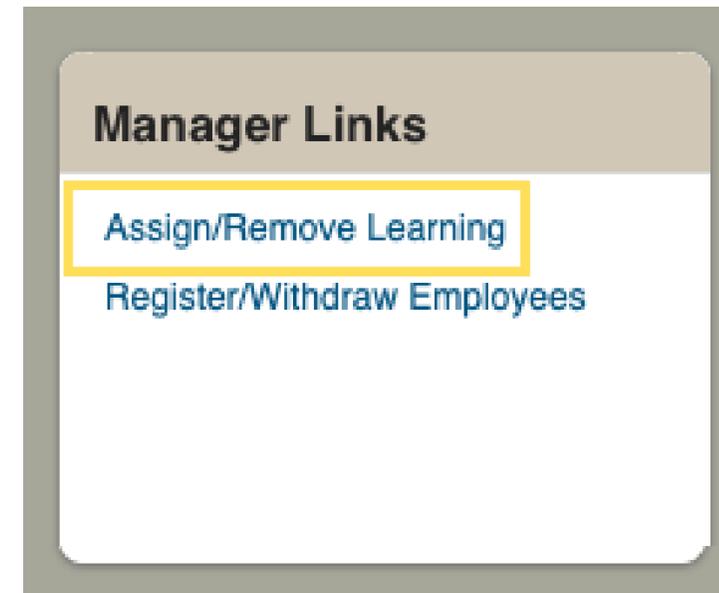


Assign & Remove Cont.

The second way to assign and remove learning to an employee is on the "Manager Links" tile.

Locate the "Manager Links" tile on the right of the "Learning Plan" page and click "Assign /Remove Learning."

Once on the "Assign/Remove Learning" page, click either "Assign Learning" or "Remove Assigned Learning."



Assign & Remove Cont.

Once both the appropriate course and employee are selected, click "continue" to assign or remove.

After clicking "continue" you will be prompted to confirm details and click either "Assign Learning" or "Remove Learning" to submit.

Once submitted you will receive either the message "Successfully Assigned" or "Successfully Removed" on the following page.

← Back
Assign Learning

Enter Learning Activity Details
* Required

Items, Programs and Curricula + Add

There are no items, programs or curricula selected.

Employees + Add

There are no employees selected.

Cancel Continue

← Back
Assign Learning

Confirm Details

Items, Programs and Curricula

Title	Type	Assignment Type	Priority	Assign Date	Required Date
.NET Deep Dive: NuGet Package Manager	🌐		---	12/16/2021	

Employees

Name
Tamara Dasha Johnson

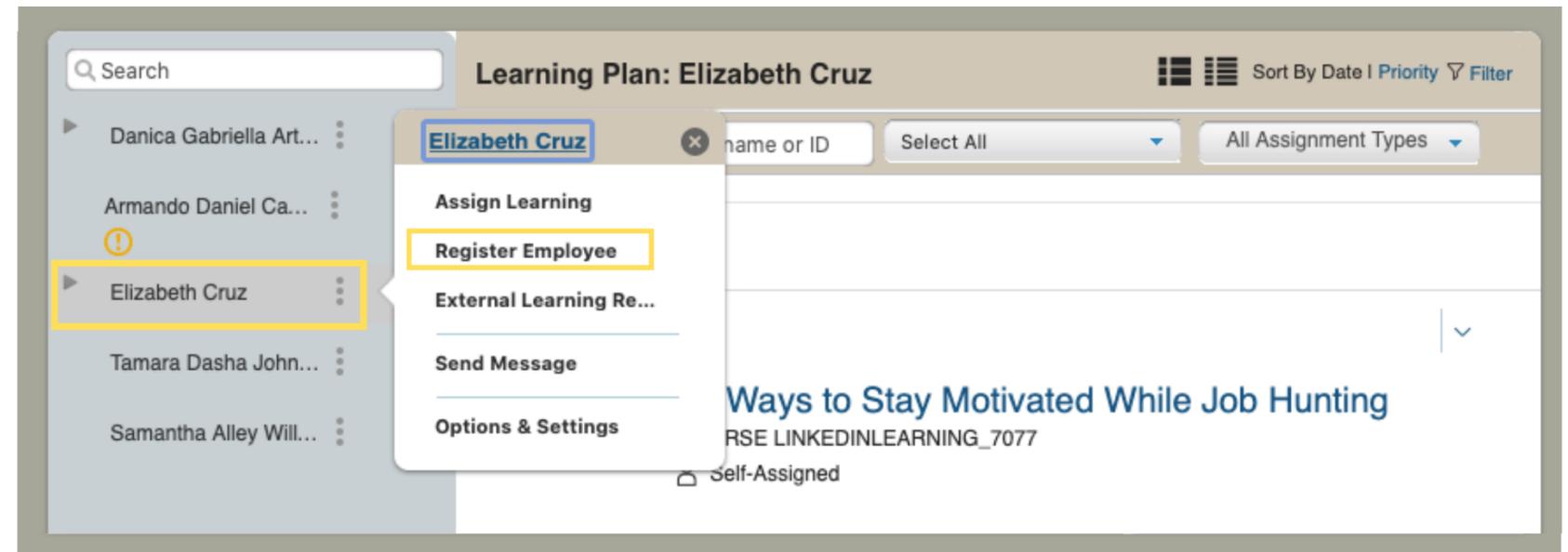
Cancel Assign Learning

Register Employees

There are two ways to register a course to an employee. The first way is located under "Learning Plan."

Start by selecting the employee you want to register the course to and click the three dots next to their name.

When the pop up box appears, click "Register Employee."

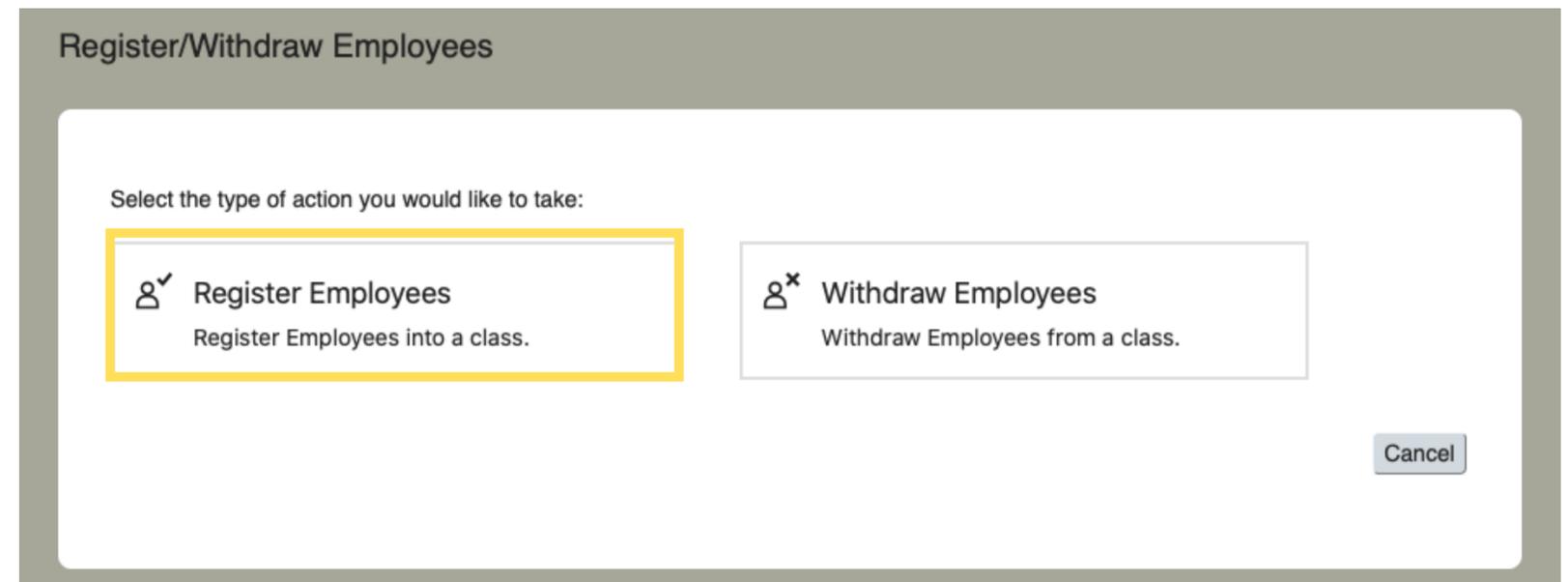
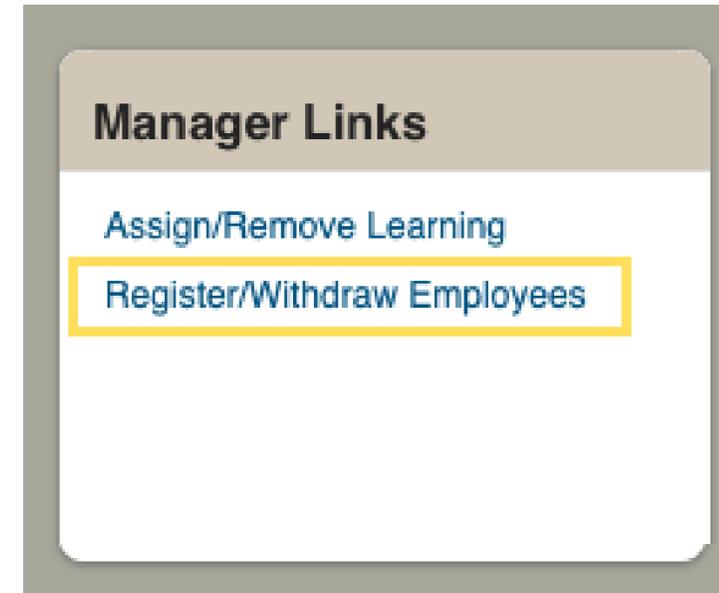


Register Employees Cont.

The second way to register a course to an employee is on the "Manager Links" tile.

Locate the "Manager Links" tile on the right of the "Learning Plan" page and click "Register /Withdraw."

Once on the "Register /Withdraw Employees" page, click "Register Employees."



Register Employees Cont.

After clicking "register employee" you will navigate to the "Register Employees for Class" page.

First select the appropriate class by clicking the "add" button.

After selecting the appropriate class you will then be prompted to select the appropriate employee.

Once both class and employee are selected, click "continue."

Register Employees for Class

Enter Registration Details
* Required

Class
No class selected
+ Add

Employees
No employees selected
+ Add

Cancel Continue

Register Employees for Class

Enter Registration Details
* Required

Class: WellCats Educational Series [Change Class](#)

Start Date/Time: 1/27/2022 12:00 PM America/Chicago
Facility & Location:
Available Seats: 0 of 50 enrolled, 0 waitlisted

Description: No Description
Associated Item: COURSE WellCats Ser

Employees
+ Add

Name	Registration Status	Payment Method	Account	Comments	Remove
Tamara Dasha Johnson	Active Enrollment (Enrr			+	x

Cancel Continue

Register Employees Cont.

After clicking "continue" you will be prompted to confirm details and click "Register Employees" to submit.

Once submitted you will receive the message "Successfully Registered" on the following page.

← Back
Register Employees for Class

Confirm Registration Details

Class: WellCats Educational Series ⓘ

Start Date/Time: 1/27/2022 12:00 PM America/Chicago Description: No Description
Facility & Location: Associated Item: COURSE WellCats Ser

Employees

Name	Registration Status	Payment Method	Comments
Johnson Dasha Tamara	Active Enrollment(Enrolled)		

Notify: Users Instructors Managers Others

Successfully Registered

Successfully Registered

All registrations in this class were successful.

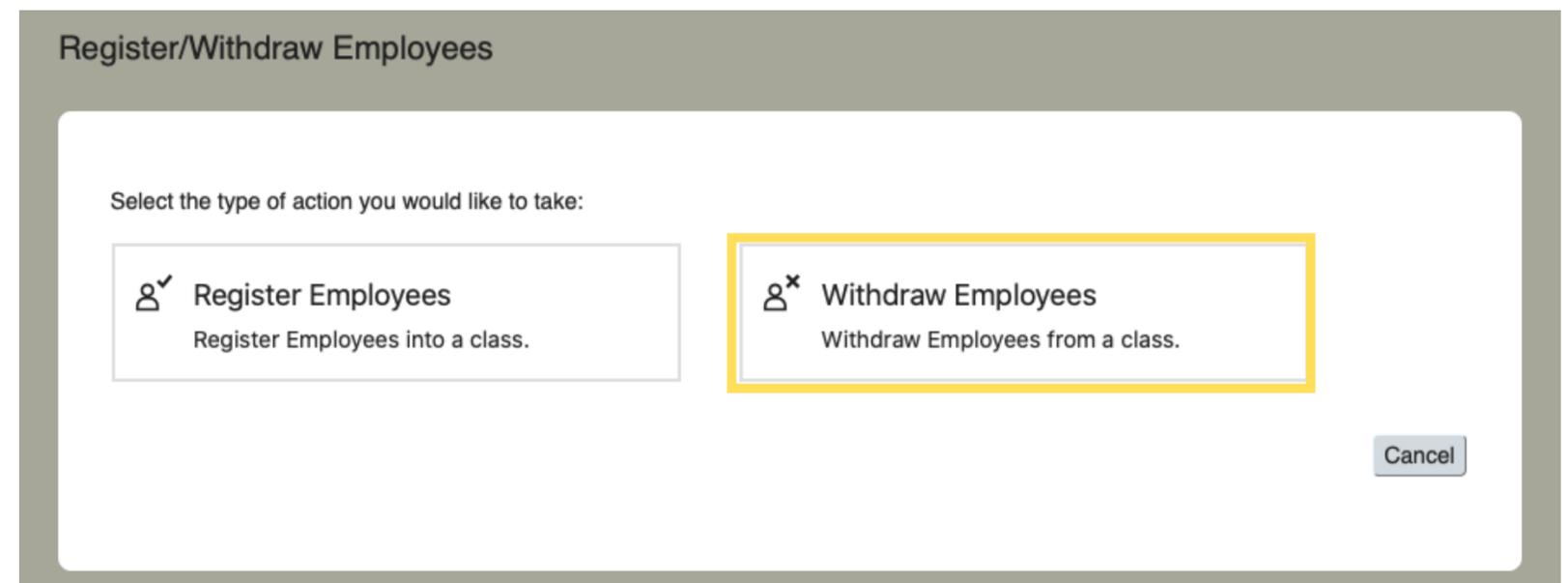
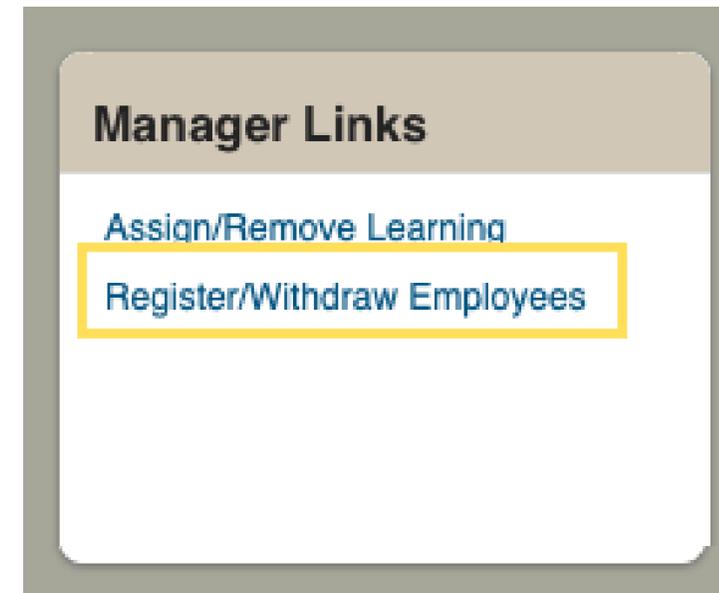
[Register or withdraw more employees](#)

Withdraw Employees

To withdraw an employee from a course locate the "Manager Links" tile.

The "Manager Links" tile is on the right of the "Learning Plan" page. Click "Register /Withdraw."

Once on the "Register /Withdraw Employees" page, click "Withdraw Employees."



Withdraw Employees Cont.

After clicking "withdraw employee" you will navigate to the "Withdraw Employees from Class" page.

First select the appropriate class by clicking the "add" button.

After selecting the appropriate class you will then be prompted to select the appropriate employee.

Once both class and employee are selected, click "continue."

The image displays two screenshots of the "Withdraw Employees from Class" form. The top screenshot shows the "Enter Registration Details" section with a "Class" dropdown menu. A yellow box highlights the "+ Add" button next to the dropdown. The bottom screenshot shows the "Enrolled Employees" section with a table of employees. A yellow box highlights the "Continue" button at the bottom right of the form.

Top Screenshot: "Withdraw Employees from Class"

Enter Registration Details
* Required

Class [No class selected] **+ Add**

Enrolled Employees
Select a class to view registered employees

Cancel Continue

Bottom Screenshot: "Withdraw Employees from Class"

Enter Registration Details
* Required

Class: WellCats Educational Series [Change Class](#)

Start Date/Time: 1/27/2022 12:00 PM America/Chicago Description: No Description
Facility & Location: Associated Item: COURSE WellCats Ser

Enrolled Employees

Name	Registration Status	Withdraw
Tamara Dasha Johnson	Active Enrollment(Enrolled)	<input checked="" type="checkbox"/> Select All

Cancel **Continue**

Withdraw Employees Cont.

After clicking "continue" you will be prompted to confirm details and click "Withdraw Employees" to submit.

Once submitted you will receive the message "Successfully Withdrawn" on the following page.

Withdraw Employees from Class

Confirm Withdrawal Details

Class: WellCats Educational Series

Start Date/Time: 1/27/2022 12:00 PM America/Chicago Description: Associated Item: COURSE WellCats Ser

Primary Location:

Employees to be Withdrawn

User	Organization	Item	Title	Class ID	User can Self-Register
Johnson Dasha Tamara	Human Resources	COURSE WellCats Ser	WellCats Educational Series	141	No

Notify: Users Instructors Managers Others

Remove associated item from the Learning Plan

Cancel **Withdraw Employees**

Withdraw Employees from Class

Successfully Withdrawn

All withdrawals in this class were successful. Where applicable a refund has been issued to the withdrawn users.

[Register or withdraw more employees](#)

Close

Dashboard

As a supervisor, you will be able to view a detailed overview of current assigned trainings to your employees via the "My Team" tab.

From the SF Learning home page, click on the "My Team" tab.

Locate the "Manager Links" tile on the right of the "Learning Plan" page and click "Dashboard."

The screenshot shows the Texas State Learning Plan interface. At the top, there is a navigation bar with "My Learning", "My Classes", and "My Team" tabs. The "My Team" tab is selected. Below the navigation bar, there is a search bar for "Jeffrey Riddle" and a "Learning Plan: Jeffrey Riddle" header. The main content area displays a list of training assignments. The first assignment is "Preventing Harassment and Discrimination (EEO & Title IX)" with a due date of 4/29/2023 and a "REQUIRED" status. The second assignment is "LGBTQIA Allies Training" with a due date of 5/12/2023 and a "REQUIRED" status. On the right side, there is a "Find Learning" section with a search bar and a "Go" button. Below that is a "Manager Links" section with links for "Assign/Remove Learning", "Register/Withdraw Employees", "Dashboard" (highlighted with a yellow box), and "Reports".

Dashboard Cont.

After clicking "Dashboard" you will navigate to the Dashboard page.

On this page, you can view a status report of all employees that report to you.

You will also have the option to filter trainings to view either 'Learning' or 'Curricula.'

**Note: Visit the [glossary](#) on page 3 for definitions of 'Learning' and 'Curricula.'*

The screenshot displays the 'Employee To-Dos' dashboard. At the top, there is a 'Back' button and a 'Help' icon. Below the title, there is a 'Show:' dropdown menu set to 'All' and a 'Due Date:' dropdown menu set to 'Next 60 Days'. The main content is a table with the following columns: Employee, Type, Title, Due Date, and Status. The table lists several training tasks for Jeffrey Riddle, including 'Preventing Harassment and Discrimination (EEO & Title IX)' and 'LGBTQIA Allies Training'. A yellow box highlights the 'Show:' dropdown menu, which is open to show options: 'Curricula', 'All', 'Learning', and 'Curricula' (highlighted in blue).

Employee	Type	Title	Due Date	Status
Riddle, Jeffrey	Curriculum	Preventing Harassment and Discrimination (EEO & Title IX)	4/29/2023	Incomplete
	Learning	Preventing Harassment and Discrimination (EEO & Title IX)	4/29/2023	Available
	Learning	LGBTQIA Allies Training	5/12/2023	Must be registered
		Preventing Harassment and Discrimination (EEO & Title IX)	4/16/2022	Incomplete
		Preventing Harassment and Discrimination (EEO & Title IX)	4/16/2022	Available
		Safety Training	3/31/2023	Incomplete
		Safety Training	3/31/2023	In progress
	Curriculum	Preventing Harassment and Discrimination (EEO & Title IX)	4/30/2023	Incomplete

Dashboard Cont.

Supervisors can also filter by 'Due Date' on the Dashboard page.

Filter for any trainings overdue or due in the next 30 or 60 days.

The screenshot shows the 'Employee To-Dos' dashboard. At the top right, there is a 'Due Date' filter dropdown menu set to 'Next 60 Days'. A larger dropdown menu is open, showing options: 'Overdue', 'Overdue', 'Next 30 Days', and 'Next 60 Days'. The 'Overdue' option is highlighted in blue. Below the dropdown, a table lists training tasks with columns for Employee, Type, Title, Due Date, and Status.

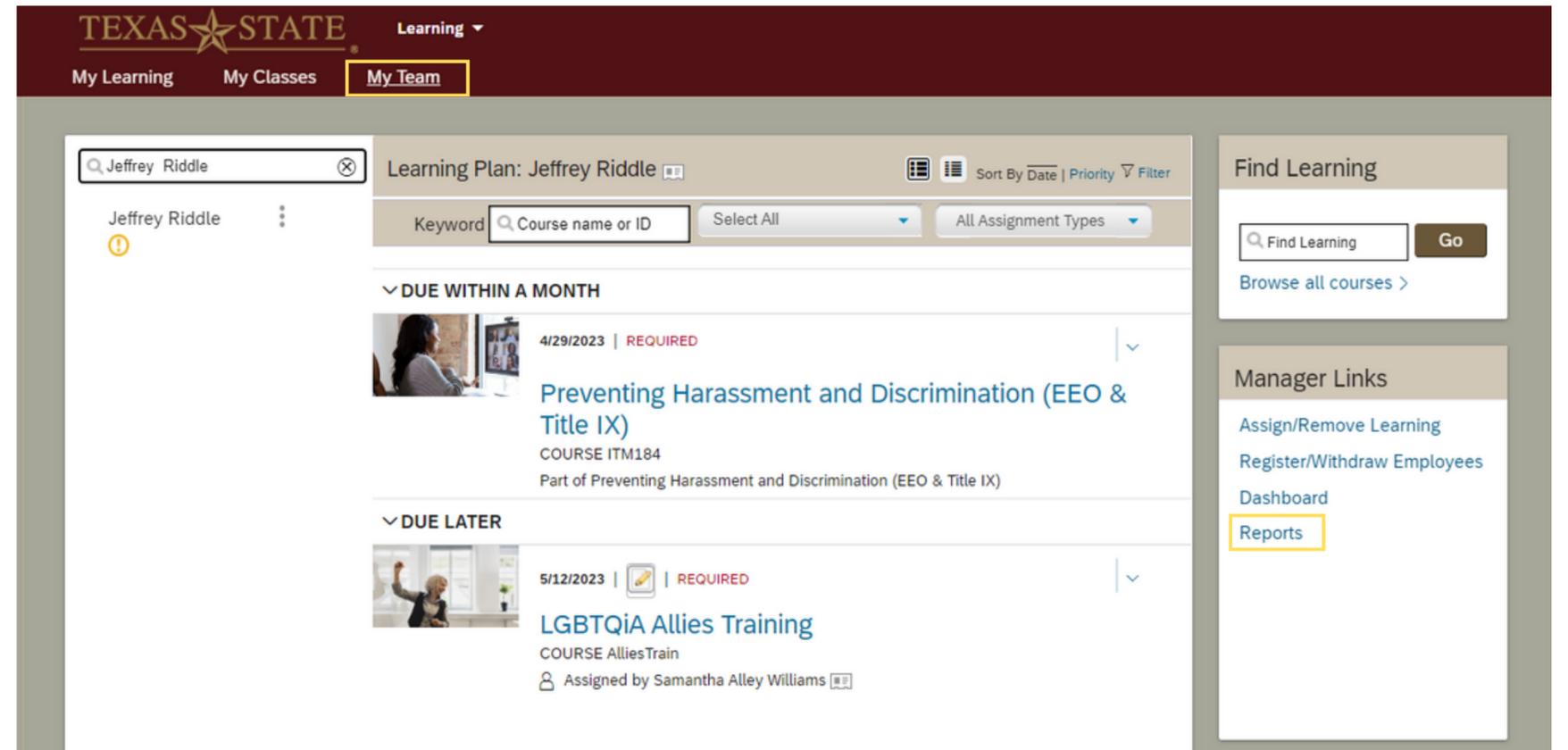
Employee	Type	Title	Due Date	Status
Riddle, Jeffrey	Curriculum	Preventing Harassment and Discrimination (EEO & Title IX)	4/29/2023	Incomplete
	Learning	Preventing Harassment and Discrimination (EEO & Title IX)	4/29/2023	Available
			5/12/2023	Must be registered
		ment and Discrimination (EEO & Title IX)	4/16/2022	Incomplete
		ment and Discrimination (EEO & Title IX)	4/16/2022	Available
		ety Training	3/31/2023	Incomplete
		ety Training	3/31/2023	In progress
	Curriculum	Preventing Harassment and Discrimination (EEO & Title IX)	4/30/2023	Incomplete

Reports

As a supervisor, you will be able to view 'Learning History' and 'Learning Needs' for your employees via the "My Team" tab.

From the SF Learning home page, click on the "My Team" tab.

Locate the "Manager Links" tile on the right of the "Learning Plan" page and click "Reports."



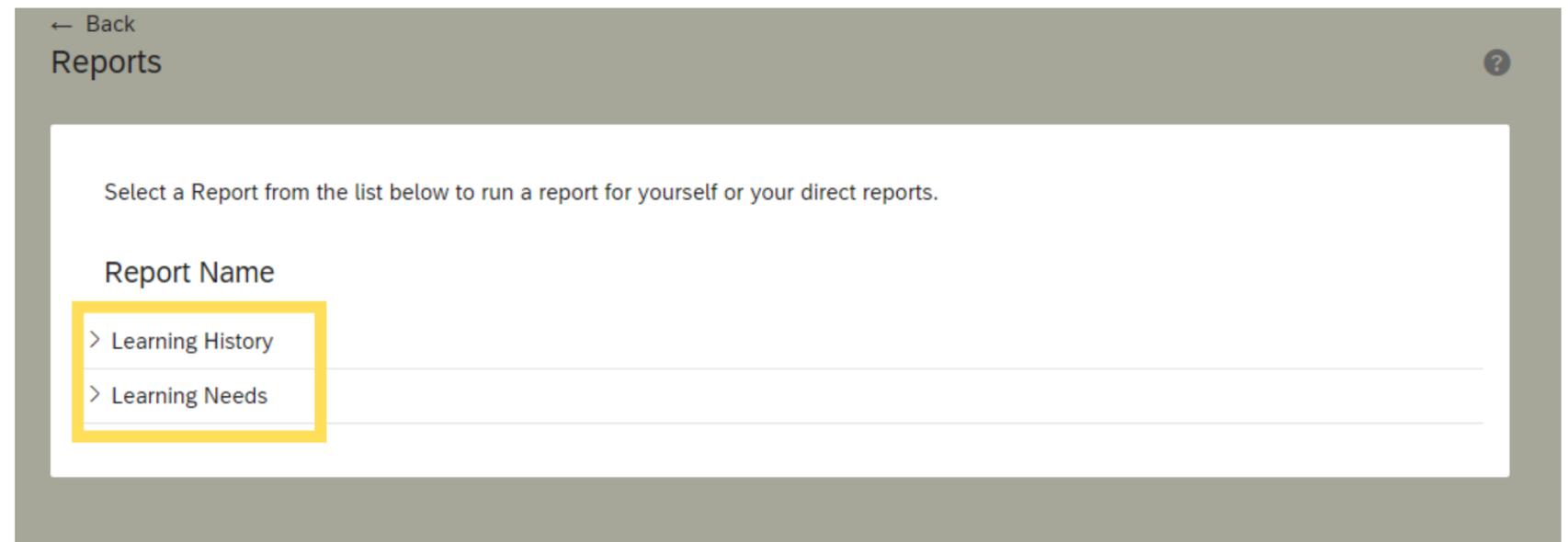
The screenshot shows the 'My Team' tab selected in the 'Learning' header. The page displays a learning plan for Jeffrey Riddle. On the left, there is a search bar with 'Jeffrey Riddle' and a dropdown menu showing the name. The main content area is titled 'Learning Plan: Jeffrey Riddle' and includes a search bar for 'Course name or ID', a 'Select All' button, and a dropdown for 'All Assignment Types'. The plan is organized into two sections: 'DUE WITHIN A MONTH' and 'DUE LATER'. The first section contains a course titled 'Preventing Harassment and Discrimination (EEO & Title IX)' with a due date of 4/29/2023 and a 'REQUIRED' status. The second section contains a course titled 'LGBTQIA Allies Training' with a due date of 5/12/2023 and a 'REQUIRED' status, assigned by Samantha Alley Williams. On the right side of the page, there is a 'Find Learning' section with a search bar and a 'Go' button, and a 'Manager Links' section with a 'Reports' link highlighted in a yellow box.

Reports Cont.

After clicking "Reports" you will navigate to the Reports page.

On this page, you will have the option to view either 'Learning History' or 'Learning Needs' of the employees that report to you.

'Learning History' is a view of all previously completed courses and 'Learning Needs' is a view of current required trainings and due dates.



Reports: Learning History

To view Learning History export options, click on "Learning History."

After clicking "Learning History," you will see a list of export options for your report. Use the CSV version to download in spreadsheet form.

When selecting a Report type select "Summary" for the best report results.

**Note: Please use the "Direct Reports" option when selecting a "User."*

← Back
Reports

Run Learning History

User: Self Direct Reports All

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Mask User IDs

Page Break Between Records

Completed Date From:

Completed Date To:

Report Type: Summary

Include: Item Events External Events Program Ev

Print Comments: Yes No

Sort By: Completion Date Entity ID

Reset Run Report

Report Name

Learning History

Learning History (CSV)

Reports: Learning History Con't

If you are to check the "Mask User IDs" box your exported report will not include their TXST ID (A#).

Keep the "Mask User IDs" box checked if you intend to share your report via email.

Once you've clicked your preferred export format, click "Run Report" to export file.

**Note: These reports are as designed by the system. Any filtering will need to be done on an ad hoc basis.*

The screenshot shows a web interface for generating a 'Run Learning History' report. The interface includes a 'Back' link and a 'Reports' header. The main form contains the following fields and options:

- User:** Radio buttons for 'Self', 'Direct Reports' (selected), and 'All'.
- Report Title:** Text input field containing 'Learning History'.
- Report Header:** Text input field.
- Report Footer:** Text input field.
- Report Destination:** Dropdown menu set to 'Browser'.
- Report Format:** Dropdown menu set to 'HTML'.
- Mask User IDs:** Checked checkbox, highlighted with a yellow box.
- Page Break Between Records:** Checked checkbox.
- Completed Date From:** Date picker field.
- Completed Date To:** Date picker field.
- Report Type:** Radio buttons for 'Summary' (selected) and 'Detail'.
- Include:** Radio buttons for 'Item Events', 'External Events', and 'Program Events'.
- Print Comments:** Radio buttons for 'Yes' and 'No' (selected).
- Sort By:** Radio buttons for 'Completion Date' (selected) and 'Entity ID'.
- Buttons:** 'Reset' and 'Run Report' (highlighted with a yellow box).

Reports: Learning Needs

To view Learning Needs export options, click on "Learning Needs."

After clicking "Learning Needs" you will see a list of export options for your report. Use the CSV version to download in spreadsheet form.

**Note: Please use the "Direct Reports" option when selecting a "User."*

← Back
Reports

Run Learning Needs (CSV)

User: Self Direct Reports All

Report Destination: Local File

Report Format: CSV

CSV Report Delimiter: Comma (,)

Mask User IDs

Required Date From: (MM/DD/YYYY)

Required Date To: (MM/DD/YYYY)

Item Criticality Selection Options: Needs Requirements

Reset Run Report

Learning Needs

- Learning Needs (CSV)
- Learning Needs Group By Employee Status
- Learning Needs Group By Employee Type
- Learning Needs Group By Item
- Learning Needs Group By Job Code
- Learning Needs Group By Job Location
- Learning Needs Group By Manager
- Learning Needs Group By Organization
- Learning Needs Group By User

Reports: Learning Needs Con't

When selecting an Item Criticality Option, selecting "Requirements" will include training that either self-assigned or assigned by their supervisor and selecting "Needs" will include curricula.

Keep the "Mask User IDs" box checked if you intend to share your report via email.

Once you've clicked your preferred export format, click "Run Report" to export file.

← Back
Reports

Run Learning Needs (CSV)

User: Self Direct Reports All

Report Destination: Local File ▾

Report Format: CSV ▾

CSV Report Delimiter: Comma (,) ▾

Mask User IDs

Required Date From: (MM/DD/YYYY)

Required Date To: (MM/DD/YYYY)

Item Criticality Selection Options: Needs Requirements

Reset Run Report

*Note: Visit the [glossary](#) on page 3 for definitions of 'Learning' and 'Curricula.'

How to Read a Learning Needs Report

The following definitions will help you read the Learning Needs report.

Item Title	Assignment Type ID	Assignment Type	Assignment Date	Required Date	Expiration Date	Days Remaining
LGBTQIA Allies Training	REQUIRED	Required	3/30/2023	5/12/2023		-26
Preventing Harassment and Discrimination (EEO & Title IX)	REQUIRED	Required	2/28/2023	4/29/2023		-39
Preventing Harassment and Discrimination (EEO & Title IX)	REQUIRED	Required	2/15/2022	4/16/2022		-417
Preventing Harassment and Discrimination (EEO & Title IX)	REQUIRED	Required	3/1/2023	4/30/2023		-38
Student Worker Safety Training	REQUIRED	Required	3/1/2023	3/31/2023		-68

Assignment Type	The indicates if the training is required or not.
Assignment Date	This is the date the training was assigned.
Required Date	This is the date a training is due.
Expiration Date	This is the renewal date for any curricula.
Days Remaining	This is how many days left to complete a training or days overdue. <i>*Note: Overdue days will show as negative</i>

**HAPPY
LEARNING!**





Thank You

For more information, please contact Talent Development & Communications (TDC).



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