SuccessFactors (SF) Learning

Supervisor's Guide
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Glossary

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASSIGN</td>
<td>When you assign a course to an employee, it lets the employee know these are courses you want them to attend.</td>
</tr>
<tr>
<td>REMOVE</td>
<td>When you remove a course from an employee, it lets the employee know you no longer want them to attend that course.</td>
</tr>
<tr>
<td>REGISTER</td>
<td>When you register a course to an employee, it lets the employee know you signed them up for a specific scheduled course.</td>
</tr>
<tr>
<td>WITHDRAW</td>
<td>When you withdraw an employee from a course, it lets the employee know you no longer want them to attend that scheduled course.</td>
</tr>
<tr>
<td>CURRICULA</td>
<td>Required trainings with recurring renew date.</td>
</tr>
<tr>
<td>LEARNING</td>
<td>Any training that is assigned or registered to direct reports.</td>
</tr>
</tbody>
</table>
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.
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.
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."
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."
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.
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.”
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."
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."
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.
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."
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.
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."
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.'
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.
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."
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."
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.
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."
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.

*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.

<table>
<thead>
<tr>
<th>Item Title</th>
<th>Assignment Type</th>
<th>Assignment Date</th>
<th>Required Date</th>
<th>Expiration Date</th>
<th>Days Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>LGBTQIA Allies Training</td>
<td>REQUIRED</td>
<td>3/30/2023</td>
<td>5/12/2023</td>
<td></td>
<td>-26</td>
</tr>
<tr>
<td>Preventing Harassment and Discrimination (EO &amp; Title IX)</td>
<td>REQUIRED</td>
<td>2/28/2023</td>
<td>4/29/2023</td>
<td></td>
<td>-39</td>
</tr>
<tr>
<td>Preventing Harassment and Discrimination (EO &amp; Title IX)</td>
<td>REQUIRED</td>
<td>2/15/2022</td>
<td>4/16/2022</td>
<td></td>
<td>-417</td>
</tr>
<tr>
<td>Preventing Harassment and Discrimination (EO &amp; Title IX)</td>
<td>REQUIRED</td>
<td>3/1/2023</td>
<td>4/30/2023</td>
<td></td>
<td>-38</td>
</tr>
<tr>
<td>Student Worker Safety Training</td>
<td>REQUIRED</td>
<td>3/1/2023</td>
<td>3/31/2023</td>
<td></td>
<td>-68</td>
</tr>
</tbody>
</table>

- **Assignment Type**: 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.

*Note: Overdue days will show as negative*
HAPPY LEARNING!
Thank You

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

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