Introduction

An important function for supervisors is to improve and enhance the skills of staff and reduce knowledge gaps in their teams. Studies show that engaged employees are better equipped to reach their own personal and organizational goals when supervisors and leadership encourage and promote available learning opportunities.

The SuccessFactors Learning module can aid in these goals. This system offers supervisors many features for viewing and managing the learning and development goals of their employees. Supervisors and Directors are able to view and manage their reporting line. Supervisors may take action and run status reports of staff who report to them (both direct and indirect). *

*Note: Licensing of the Learning Management system is restricted to UC faculty, staff, and student employees. Currently no affiliates or corporate employees have access or are recognized in SuccessFactors.

Please refer to the SuccessFactors Learning End User Guide to learn the basic navigation and functions of the Learning Module. This guide will cover the specific tools and functions associated with the supervisor role.

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Getting Started: Logging On

Access to SuccessFactors Learning is controlled through Single Sign-On (SSO). Use your valid UC User Name and password to log in. Mobile devices (iPad or Smartphones) may also be used.

- Log into SuccessFactors by following the link on this webpage: http://www.uc.edu/hr/tools/successfactors.html or by selecting it from the “Tools” menu on the UCHR website.
- Enter your UC User name and password. (Figure 1)
- Click “Log On”.
- Successful login will present the SuccessFactors Home page.
- From the Home page, click on the Home drop-down menu in the upper left corner. (Figure 2)
- Select Learning from the menu to navigate to the Learning Dashboard. (Figure 2)
- When the Learning page loads, the “How to Get the Most Out of Learning” dialog box displays. Click the Continue button to dismiss the dialog box. (Figure 3)

**Note:** To prevent the dialog box from re-appearing each time you sign in, click the box next to “Do not show this page every time I sign in”. (Figure 3)
My Learning Tab
Once you log into Learning, the My Learning tab (Figure 4) displays. As a supervisor, the My Learning tab provides you the ability to manage both your own and your team members learning items through a variety of easy to use functions. An item is an assignable unit that can be tracked in the SuccessFactors Learning system. It may be a learning or non-learning activity. Items are usually thought of as “courses”; however, they can be much more. For example, reading a standard operating procedure or attending a mandatory all-hands meeting. (Figure 4).

Each area is explained in greater detail on the next page.
Let’s take a closer look at the areas on the My Learning Tab:

A. Find Learning
Find Learning (Figure 4A) allows you to add courses to your personal Learning Plan To-Do List. Enter keywords and click Go to perform a quick search, or click Browse all courses to look through the catalog. (The process for adding learning items to your team’s learning plan is discussed in a later section).

B. My Employees
Displays a list of your direct reports and the status of their learning items. My Employees tile (Figure 4B) displays a current view of your teams learning status. Click on the chart to access the My Employees tab.

C. Supervisor Notifications
In addition to your own learning, My Learning Assignments (Figure 4C) displays any Supervisor Notifications relevant to the Learning system - such as pending approvals. Click “View Pending Request” to view the action required.

D. Links
As a supervisor you may use the Links tile (Figure 4D) to review Approvals for your team, Record Learning events for team members, and run Reports on your team.

- Review pending Approvals submitted by direct reports.
- Record Learning events for team members.
- Run Reports on your team.

For more information, see “Supervisor Links (Tile)” section.
**My Employees Tab**

Supervisors are configured to view a tab from within Learning: My Employees. My Employees tab will change your page view to a team view. Team View shows you the assignments and learning progress of your team(s). The My Employees tab (Figure 5) is used to manage the learning activities of direct and indirect reports. Each employee on the team can be assigned a Learning Plan. The Learning Plan displays the item that the employee is required to complete, either on a one time, or recurring basis. All items shown are those that the employee has not yet successfully completed. (Each area is explained in greater detail on the next page).
Let’s take a closer look at the areas on the **My Employees** Tab:

A. **Employee Hierarchy**
   The **Employee Hierarchy** is located on the left side of the My Employee tab screen (Figure 5A). Click an employee’s name in the **Employee Hierarchy** menu to view their **Learning Plan To-Do List**. If they have direct reports, this will reveal the direct report names allowing you to view and manage their learning items as well.

B. **Learning Plan To-Do List**
   Once an employee is selected from the Employee Hierarchy (Figure 5A), view the **Learning Plan To-Do List** (Figure 5B) to see a consolidated view of learning activities requiring action.
   - All activities related to the employees are listed in one place.
   - Tasks are listed and grouped by **Due Date**.

C. **Find Learning**
   **Find Learning** (Figure 5C) allows you to add courses to both your own personal **Learning Plan To-Do List** or those of your employees. Enter **keywords** and click **Go** to perform a quick search, or click **Browse all courses** to look through the catalog. The process for adding learning items to your team’s learning plan is discussed in the “**Assign/Remove**” section of this document.
D. Supervisor Links

Use Supervisor Links (Figure 5D) to quickly go to different sections of the learning module to manage your team’s learning items. Options include: Assign/Remove Learning, Record Learning, Dashboard, Organization Chart, Register/Withdraw Employees, Approvals and Reports. For more information, see “Supervisor Links (Tile)” section.

E. Track Status

View Status updates (Figure 5E) tracking the selected employee’s progress on learning activities.

- Curricula displays the employee’s progress on assigned curriculum.
- Learning History lists learning activities completes in the last 30 days.
- Competencies displays links to assigned competencies and development activities.
Team Member Actions

Team Member Actions is a way to quickly take action on an individual employee’s learning environment. Similar to Supervisor Links, team member actions can be viewed or modified. Click on the ellipses (three vertical dots) next to a name in the Employee Hierarchy menu to take the following actions: (Figure 6)

- **Assign Learning**: Search the course catalog and assign learning items to the employee. (See the “Assign Learning” section for more details.)

- **Register Employee**: Locate a scheduled offering and register the employee for a particular course day and time. (See the “Register/Withdraw” section for more information.)

- **Manage Alternate Supervisor**: Assigns alternate manager(s) to the employee. Either alternate or primary managers can complete the manage tasks in the system.

  **Note**: When users report to an alternative supervisor for an extended period of time, you can transfer some responsibility to the alternate supervisor. A common example is when employees work on a project where they report to a project manager for the time of the project but their primary manager remains their supervisor in the Supervisor field.

  An Alternate Supervisor:
  
  a. Performs all supervisor duties for the User(s) they are assigned to.
  b. Receives all supervisor emails related to the User(s) they are assigned to.

- **Reports**: Run reports on data such as learning history, learning needs (items currently on the learning plan), and curriculum status for the employee. (See the Supervisor Reporting section for more information.)

- **External Requests**: Opens a form to complete when requesting to attend an external event. An external event refers to learning events not directly available for registration or completion through SuccessFactors Learning. Examples of External Requests might be conference attendance or external development sessions not provided by UC.

- **Options & Settings**: Read only view of notification and time settings for the employee. These are set by the administrator and cannot be altered by the supervisor or employee.
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**Supervisor Links (Tile)**

Supervisor Links tile offers many of the same actions found in the Team Members Actions, however supervisors may perform specific actions on all, or a selection of their employees from the Supervisor Links tile selections.

**Assign/Remove Learning**

Using the Assign/Remove Learning option, you can assign or remove one or more items to one or more employees. Remember, an item is an assignable activity such as an instructor-led course, online training, meeting, or policy for review. Only items in the catalog can be added. You can also remove items that the employee added to their own personal learning plan.

Go to:

**My Employees > Supervisor Links > Assign/Remove Learning**

1. Select **Assign/Remove Learning** (Figure 7) to launch the action window.

2. Select **Assign Learning** or **Remove Assigned Learning** as the action you want to take (Figure 8). For this example, we are selecting Assign Learning.

3. Select the + button next to **Items, Programs and Curricula** (Figure 9), to add items to Curricula.
4. The **Selected Desired Courses from Catalog** window will appear (Figure 10). Hover over the course you wish to add and click the **Select** option.

5. To add employees, click the + button next to **Employees** (Figure 11).

6. Review the list of employees. Select the check boxes of those employees and their subordinates, if applicable you wish to assign the learning item (Figure 12).

7. Click **Add** to add the employees to the list of employees.

8. Review the assignment information. Enter the **Assignment Type**, **Assignment Date** and **Required Date of completion**, if desired.
   
   a. **Assignment Type** – Dropdown that includes options such as “optional”, “recommended”, or “required”.
   
   b. **Assigned** – Can be assigned on the current day or in the past, not a future date.
   
   c. **Required Date** – Indicates to employee when you, as supervisor required completion of the learning item.

4. Click **Continue** when finished. Verify the information, and then click **Assign Learning** or **Back** to make edits before assigning. A confirmation window will appear. (Figure 13)

   *Note: To remove an assigned learning, follow the steps above and select the course and employee assigned to be removed.*
Register/Withdraw Employees

In addition to being able to assign items to a learner, supervisors may register or withdraw employees from scheduled offerings. A scheduled offering refers to a course/class that has a set date and time. It should be noted that as a best practice, a supervisor should have clear communication with the employee before registering or withdrawing that individual from an offering.

Go to: My Employees > Supervisor Links > Register/Withdraw

1. Select Register Employees (Figure 14).

2. The Register Employees for Scheduled Offering screen will appear. Click + Add (Figure 15).

3. The Select Desired Course from Catalog screen will appear. Enter keywords to search for the scheduled offering. Click Go (Figure 16).
4. Click on “View Course Details” to view currently scheduled offerings (Figure 17).

5. Click the “Select” field next to the schedule offering you would like to register your direct report to (Figure 18).

6. The scheduled offering will be added to the “Register Employees for Scheduled Offering” screen. You must now select the employees you wish to add to the scheduled offering. Click + Add located on the right side of the screen (Figure 19).
7. The “Select Employees” box will appear. Click the check boxes along the left side of the screen to select employees (Figure 20). Note that your direct and indirect employees will be listed.

8. Once you have selected the employee(s), a red “Add” button will appear at the bottom of the screen. Click “Add” to continue or “Cancel” to back out of the process (Figure 21).

9. Use the Registration Status drop-down for each selected employee, if necessary.

10. Click the + sign under the “Comment” column to enter any relevant Comments you would like to communicate for each selected employee’s registration, if necessary. Once clicked, the Comments box will appear (Figure 22). Type your comment and click OK.

11. Click the Continue button (Figure 23).
12. You will return to the “Register Employees for Scheduled Offering” screen (Figure 24). Confirm the registration details including any financial requirements (e.g. if the item has an associated fee). You may also select who will be notified of the registration (e.g. User, Instructors, Supervisors, Others) by checking or unchecking the associated boxes.

13. Click Register Employees to register the selected employees (Figure 24).

14. You will receive a “Successfully Registered” confirmation window (Figure 25). From here, you may click “Close” to return to your “My Employees” tab or click the hyperlinked “Register or withdraw more employees” to return to the associated screen.

Note: To withdraw employees from a scheduled event, follow the steps above and select the course and employee registration to be withdrawn.
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Approvals
Some learning items may be configured to require supervisor approval before the employee can complete the registration process or receive registration confirmation. The approval process is completely optional and up to the discretion of the course instructor or department responsible for the listing.

As a supervisor you may approve (or deny) employee requests for learning events where the approval workflow is in place. Approval notifications will be sent to your UC email account from the Learning system.

Approvals are also listed in your To Do list when you log in to SuccessFactors and in My Learning Assignments within the Learning module (Figure 26). You may quickly view all approvals by click “Approvals” from the Supervisor Links tile (Figure 27).

1. Review the list of pending approvals. Click on the ▼ to expand either Internal Training or External Training (note: we are not currently using Account Requests). Click on the course title to review the course details to help you make your approval or denial decision. (Figure 28)
2. Select under Action (Figure 29):
   - **Approve**: allows the requestor to attend/complete registration
   - **Deny**: excludes the requestor from attending/completing the registration
   - **Skip**: neither approves nor denies the request, but submits the approval to the next approval step (if secondary level approval is configured – only applicable to Public Safety). SuccessFactors Learning is configured to send requests to the direct supervisor for the approval process for all areas except Public Safety. This option should NOT be selected for any areas except Public Safety, when applicable.

3. Click **Next**

4. Add **Approval Reasons** to the approved training request (optional). (Figure 30)

5. Click **Next** (Figure 30).

6. The Pending Approvals screen will appear. Click **Confirm** to complete the approval workflow (Figure 31).
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7. A confirmation page will appear (Figure 32). Click **Start Over** to return to the main Approval page or navigate back to My Learning to exit the process.

![Figure 32](image)

Completed Work
Managers can view an employees completed work list by opening an employee’s record. Completed work displays a list of items that the employee has completed and the dates the employee completed them.

1. Select the employee for whom you which to view **Completed Work** from the team viewer.
2. Click the **Completed Work** status pod for the selected employee. The employee’s completed work displays as a secondary page.
3. Select the **Show Completions** drop-down menu to refine the list of completions to specific time periods (All, Before, After, and Between).
4. The employees completed work is listed in a table. Use the table to:
   - Select a column header to sort the table.
   - Enter a keyword in the Title to locate a specific course by name.
   - Select **Status** to refine the list of courses completed.
5. Select a course title to view the CP, Credit and Contact Hour details of the course.
6. Click **View Details** to review the full information related to the course completion.
7. Click **Print Certificate** to print a certificate of completion for the item.
8. Click the close icon on the upper-right corner to close the window and return the My Employees view.
Supervisor Reporting:

SAP SuccessFactors Learning can generate reports about your learning. Reporting is accessible via Links on the Home page. Reporting lists a variety of reports, by category, which can be used for compliance and audit history by the employee.

1. Click Reports from the Links panel of your My Learning (Figure 33)
2. View the list of available reports on the Reports screen. (Figure 34)
3. Click the expand icon > to see additional reports in each report group. (Figure 34)
4. Click the report name to select a report and display the run Reports screen. (Figure 34)

Each report page allows you to customize the following:

1. Customize the report layout by entering the Report Title, Header, and Footer, etc. (Figure 35)
2. Use the drop-down menus and criteria fields to determine options. Supervisors may choose to run the report for themselves only, their direct subordinates, all subordinates, or all including themselves. (Figure 35)
3. Once the layout and criteria are defined, click Run Report. A new window opens with the resulting information about the employee. (Figure 35)
### Key Learning Reports

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<thead>
<tr>
<th>Report Name</th>
<th>Definition / Filter / Usage</th>
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| Certificate of Completion Report  | • The Certificate of Completion Report enables you to create a report of printable Certificates of Completions for Learners by Report learning item.  
• Use the query screen to search for a Learner or Item requiring certificates. Use the Run Report for Completed learning events to filter the results for completed items.  
• The Certificate of Completion report prints the certificates of completion for Learners by Item.                                                                                                                                                                                                                     |
| Curriculum Data Report            | • Use the Curricula Data report to view information about Curricula and Sub-curricula.  
• Use the filters to locate a specific Curricula. You may choose to include sub-curricula.  
• The Curricula Data report returns Curricula attributes; including the Sub-curricula.                                                                                                                                                                                                                       |
| Curriculum Item Status Report     | • The Curricula Item Status report provides information on the Item Status Curriculum assigned to each Learner, including their curriculum status.  
• Use the filters to select the Learner and Curriculum.  
• The Report included items assignees to each Curriculum, the completion date, completion status, and required date for each item.                                                                                                                                                                                                 |
| Curriculum Status Report          | • Curriculum Status reports display information related to the status of the Learners assigned Curriculum.  
• Use the filters to select the Learner and Curriculum.  
• This report returns the Curriculum assigned to each Learner and their Curriculum status, as well as the number of days remaining before the required training needs to be completed to keep the Curriculum current.                                                                                                                                  |
| User Item Report                  | • User Item Status displays information about a Learner’s Status completion status for items during a specified time period.  
• Use the filters to select the Learner, Item completion status, and date range to run report against.  
• User Item Status report returns Learners’ completion status for the items they completed in a given date range.                                                                                                                                                                                             |
| Learning History Report           | • The Learning History Report displays information about Items that Learners have completed.  
• Use the filters to select the Learner, and date range for which you would like the report return results.  
• The Learning History report returns the Learning History (completed items) for the Learner.                                                                                                                                                                                                                     |
## Key Learning Reports (Continued)

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<thead>
<tr>
<th>Report Name</th>
<th>Definition / Filter / Usage</th>
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</table>
| **Learning Needs Report**         | • The Learning Needs Report displays information about the Items that have been assigned to the Learner that need to be completed.  
• Use the filters to select the Learner, Item, and Required Date range for which you would like the report to return results.  
• The Learning Needs report returns the Items assigned to a Learner.                                                                                                                                                                  |
| **User Online Item Status Report**| • The User Online Item Status Report displays each Learner’s progress for Online Items.  
• Use the filters to select the Learner, Item, and initial, last accessed, and completed date ranges to run the report against.  
• Through online courses reported at the content object level.                                                                                                                                                                              |
| **Registration Status Report**    | • The Registration Status Report displays registration information for both Learners and Scheduled Offerings.  
• Use the filters to select the Scheduled Offering, Learner, and registration status to run the report against.  
• The Registration Status Report returns a detailed list of registration information including registration dates and times, enrollment numbers, Instructors, and Scheduled Offering details.                                    |
| **Scheduled Offerings Report**    | • The Scheduled Offerings report displays information about each Scheduled Offering.  
• Use the filters to select the Scheduled Offering and status to run the report against.  
• The Scheduled Offerings report returns detailed information about each Scheduled Offering including the Item Scheduled, dates scheduled, registration and waitlist data, Instructor data, and segment data.                     |
| **Scheduled Offering Roster Report**| • The Scheduled Offering Roster report displays information about the Learners registration in a Scheduled Offering.  
• Use the query screen to select the Scheduled Offering to run the report against.  
• The Scheduled Offering Roster report returns the roster of Learners in a scheduled offering.                                                                                     |

### How to get help?

If you are experiencing problems with the SuccessFactors Learning module, please contact your Training Administrator or email hrlearning@uc.edu.