

# SuccessFactors Learning guide for managers

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### Logging in to SuccessFactors via a browser

#### **Background and benefits**

SuccessFactors Learning offers a centralised booking and administration system for courses offered by UCT training providers. The online platform provides a one-stop shop to find, book and manage development activities.

Staff members can access the platform on any internet-connected device (including smart phones and tablets) using their existing UCT login details. Time-consuming manual booking processes are replaced by automated processes with easy workflow for manager approval. Records of completed courses are consolidated and centrally stored, adding to a staff member's training history.

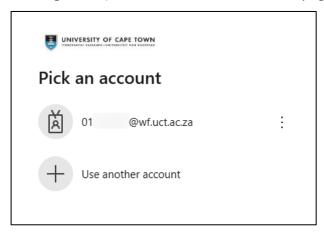
#### Support

If you are unable to access SuccessFactors or are experiencing other technical difficulties, please contact the <a href="IT-service-Desk">IT-service Desk</a>.

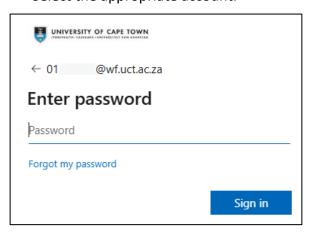
#### **Procedure**

- 1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
- 2. Log in to SuccessFactors via www.successfactors.uct.ac.za.
- 3. If not already logged in to single sign-on, the *Sign in to your account* page appears. If already logged in to single sign-on, SuccessFactors will open (see <a href="step 4">step 4</a>).

Existing users (new users will see a different page and should follow the instructions on page 4 below)



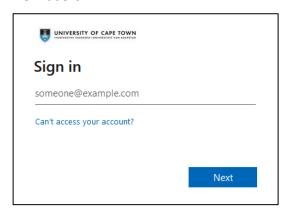
- Select the appropriate account.



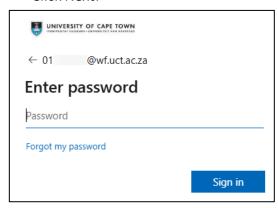
- Enter your Password and click Sign in.
- You will be prompted to verify your login either via Microsoft Authenticator or a code sent to your phone as an SMS. SuccessFactors will open (see <a href="step 4">step 4</a>).

### Logging in to SuccessFactors via a browser (continued)

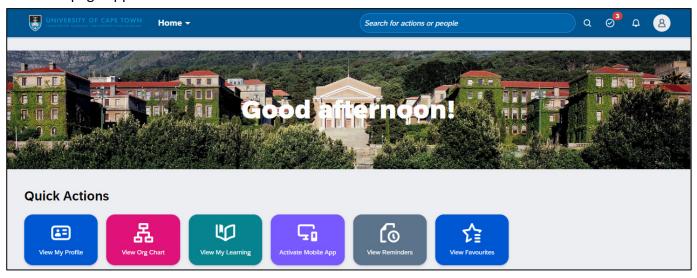
#### **New users**



- In the field below *Sign in*, enter your UCT staff number followed by @wf.uct.ac.za. E.g. 01234567@wf.uct.ac.za. **Note**: UCT staff number only, third party "T" accounts will not work.
- Click Next.



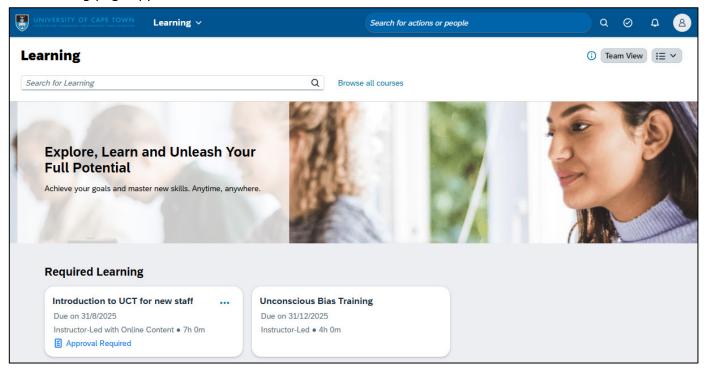
- Enter your Password and click Sign in.
- You will be prompted to verify your login either via Microsoft Authenticator or a code sent to your phone as an SMS.
- 4. The *Home* page appears.



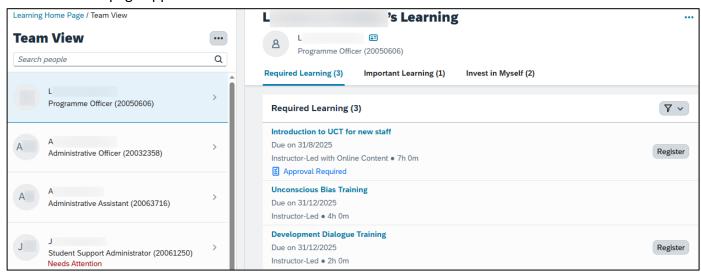
Click the View My Learning tile.

### Logging in to SuccessFactors via a browser (continued)

5. The *Learning* page appears.



- Click Team View
- 6. The Team View page appears.



See:

Viewing team learning plans and learning history

Processing approval request from the *Home* page or from the *Learning* page

Assigning learning to team members from the course library or in Team View

Registering team members on a course from the course library or in Team View

Removing assigned learning from one team member or multiple team members in Team View

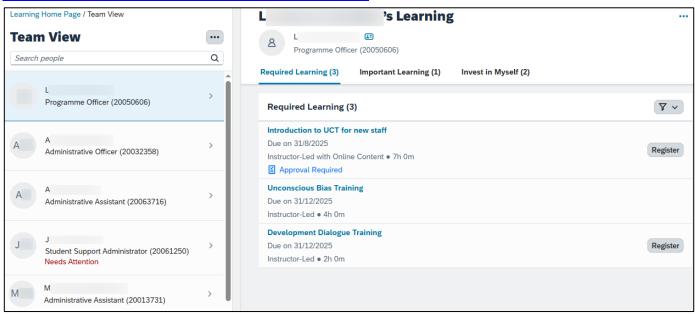
Withdrawing on team member from a class or multiple team members from a class in Team View

Recording external learning for team members

### Viewing team learning plans and learning history

#### **Procedure**

1. Log in to SuccessFactors and access the Team View page.



- All team members that report to you are displayed in the column on the left. The first team member's learning plan is automatically displayed.
- **To view other learning plans**, click the appropriate name in the column on the left or use the *Search people* field at the top of the column to search for the person.
- **To view a team member's learning history**: Select the team member, click \*\*\* Additional Options (top right) and choose View History.

### Processing approval requests from the Home page

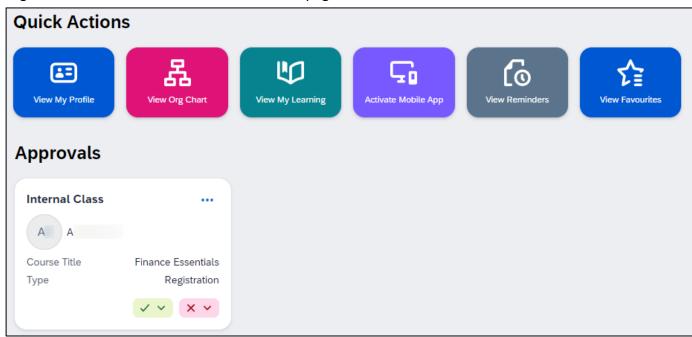
#### Before you begin

Approval requests can be processed from the *Home* page or from the *Learning* page.

See also: Processing approval requests from the Learning page.

#### **Procedure**

1. Log in to SuccessFactors and access the *Home* page.



- Any pending approval requests (registration for a class or withdrawal from a class) will appear in the *Approvals* section of the *Home* page.
  - If there is more than one pending approval, click *View All*. In the *Internal Class* dialogue box, process the pending approvals using the steps below.
- To view basic class details, click the *Course Title* e.g. Finance Essentials.
  - The Internal Class dialogue box appears.
  - To view full class details, click View Details.
  - The *Pending Approvals* page appears in a new browser tab.
  - Click the name of the class in the *Title* column e.g. Finance Essentials.
  - The full class details page appears, displaying class dates, times, venue (if applicable) and instructor information.
  - Close the browser tab to return to the *Internal Class* dialogue box.
  - Click Close to close the Internal Class dialogue box.

### Processing approval requests from the Home page (continued)

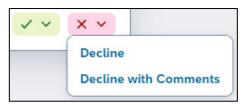
To approve a request, click the green tick:



- Either choose Approve.
  - A message briefly appears near the bottom of the page, indicating that the request was approved.
- Or choose Approve with Comments, complete the Approve with Comments dialogue box and click Approve

A message briefly appears near the bottom of the page, indicating that the request was approved.

To decline a request, click the red X:



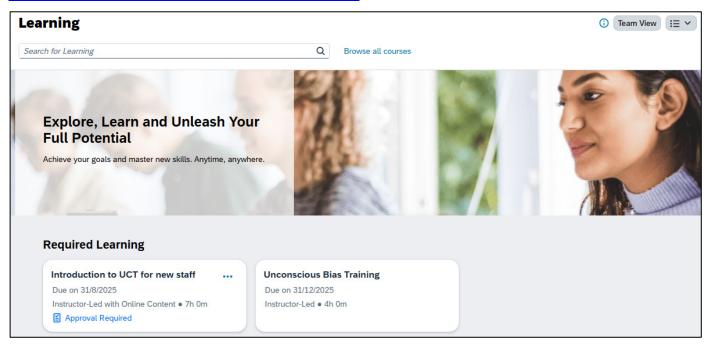
- **Either** choose *Decline*. The *Confirmation* dialogue box appears, click A message briefly appears near the bottom of the page, indicating that the request was declined.
- Or choose *Decline with Comments*, complete the *Decline with Comments* dialogue box and click Decline. The *Confirmation* dialogue box appears, click

A message briefly appears near the bottom of the page, indicating that the request was declined.

### Processing approval requests from the Learning page

#### **Procedure**

1. Log in to SuccessFactors and access the Learning page.



- Scroll down to the *Requests for Me* section to see any pending approval requests, either a registration for a class or withdrawal from a class.



- To view basic class details, click the Course Title e.g. Finance Essentials.
  - The Internal Class dialogue box appears.
  - To view full class details, click View Details.
  - The Pending Approvals page appears in a new browser tab.
  - Click the name of the class in the *Title* column e.g. Finance Essentials.
  - The full class details page appears, displaying class dates, times, venue (if applicable) and instructor information.
  - Close the browser tab to return to the *Internal Class* dialogue box.
  - Click Close to close the Internal Class dialogue box.

## Processing approval requests from the *Learning* page (continued)

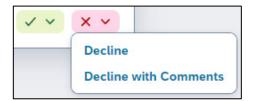
To approve a request, click the green tick:



- **Either** choose *Approve*.
  - A message briefly appears near the bottom of the page, indicating that the request was approved.
- Or choose Approve with Comments, complete the Approve with Comments dialogue box and click

A message briefly appears near the bottom of the page, indicating that the request was approved.

To decline a request, click the red X:



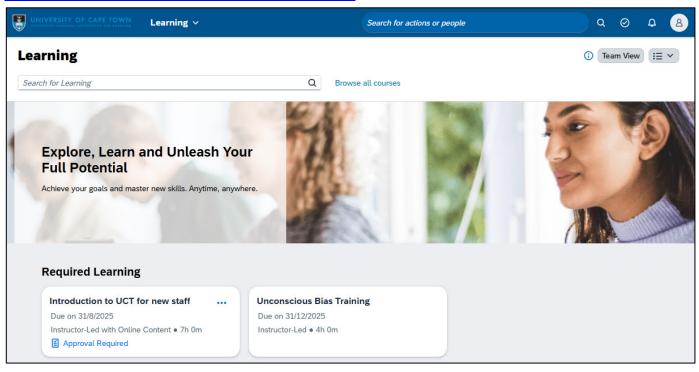
- **Either** choose *Decline*. The *Confirmation* dialogue box appears, click *Decline*. A message briefly appears near the bottom of the page, indicating that the request was declined.
- Or choose *Decline with Comments*, complete the *Decline with Comments* dialogue box and click Decline.

  The *Confirmation* dialogue box appears, click Decline.

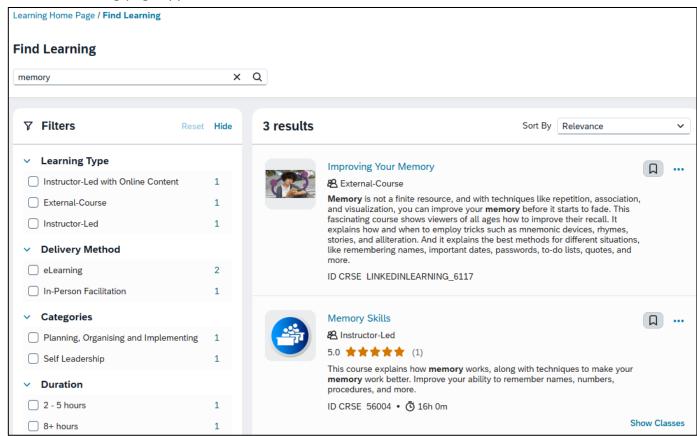
A message briefly appears near the bottom of the page, indicating that the request was declined.

#### **Procedure**

1. Log in to SuccessFactors and access the Learning page.

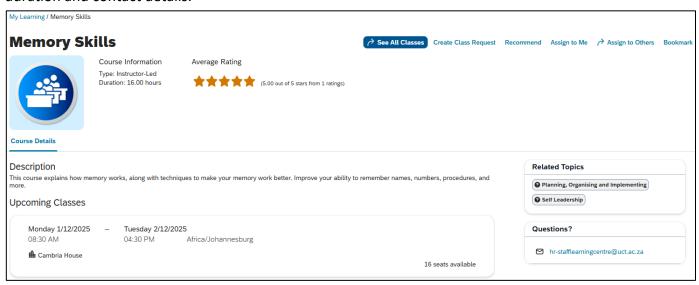


- Seach for a course in the course library by entering a search term/keyword in the *Search for Learning* field or click *Browse all courses*.
- 2. The *Find Learning* page appears.

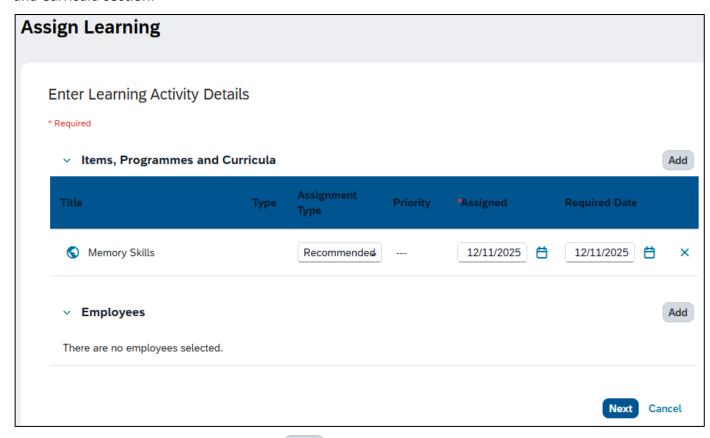


- Click the course title e.g. Memory Skills.

3. A new browser window/tab opens, showing detailed course information such as the course description, duration and contact details.

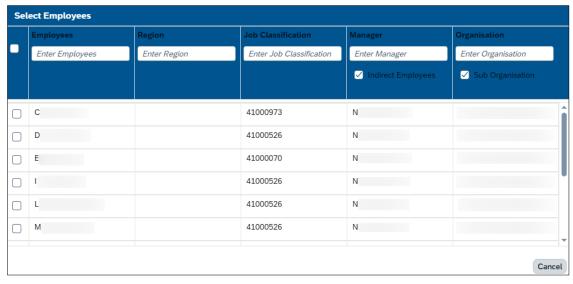


- Click Assign to Others.
- 4. The *Enter Learning Activity Details* page appears, displaying the selected course in the *Items, Programmes* and *Curricula* section.

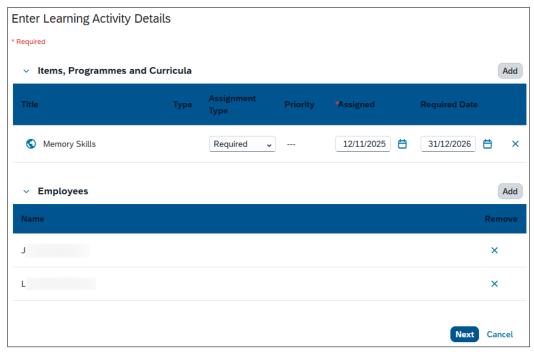


To assign more than one course, click Add on the right (in line with *Items, Programmes and Curricula*) to search the library for additional courses. In the *Select Desired Courses from Library* dialogue box, click *Select* for each course to add. Close the dialogue box when finished selecting courses.

- If appropriate, change the Assignment Type (e.g. required, recommended, optional).
- The *Required Date* field defaults to today's date, either clear the field or adjust the date to a future date by which the course must be completed.
- Click Add on the right (in line with the *Employees* heading) to choose one or more team members.
- 5. The Select Employees dialogue box appears, listing all current team members.



- Select individual employees using the  $\square$  checkboxes or click  $\square$  in the top left to select all employees.
- As employees are selected, a message in the bottom left of the dialogue box confirms the number of employees selected.
- When all required employees are selected, click
   Note: The Add button only appears after at least one employee is selected.
- 6. The Enter Learning Activity Details page reappears.

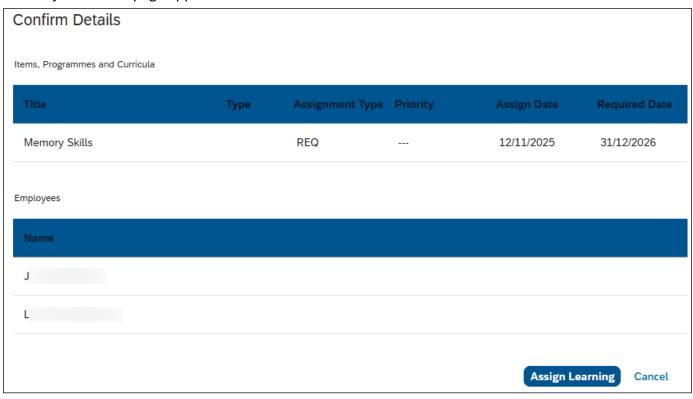


- Click Next.

7. If applicable, the *Warning Details* page appears displaying courses that are already assigned to or previously completed by the selected employees. If the warning doesn't appear, skip to step 8.

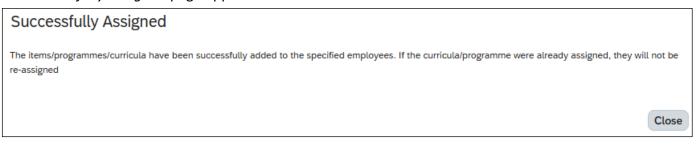


- Click Yes to proceed or click No to return to the Enter Learning Activity Details page to make changes to the selected courses and employees.
- 8. The Confirm Details page appears.



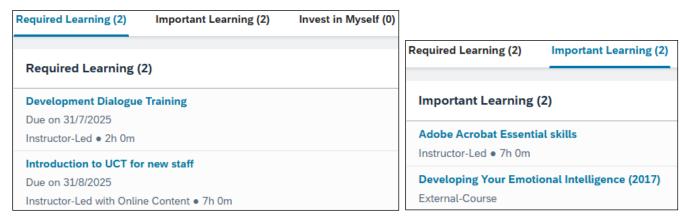
- Click Assign Learning

9. The Successfully Assigned page appears.



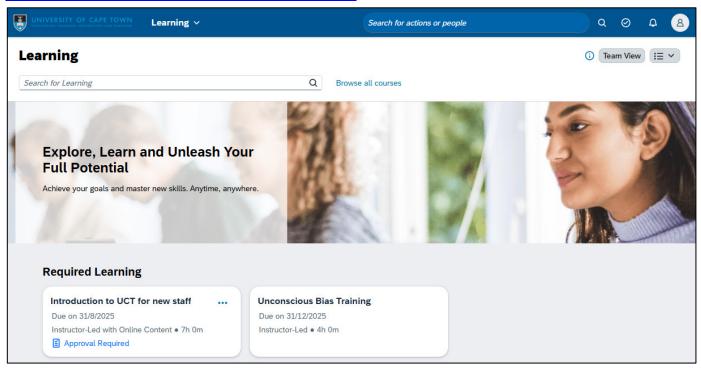
- Click Close
- 10. The Course Details page reappears.
  - Close the browser tab to return to the Learning search and click *Learning Home Page*.

- Click Team View to review team member learning plans. The assignment type chosen for each course determines the section it appears in for the team member. Required courses appear in the Required Learning section and recommended or optional courses appear in the Important Learning section.

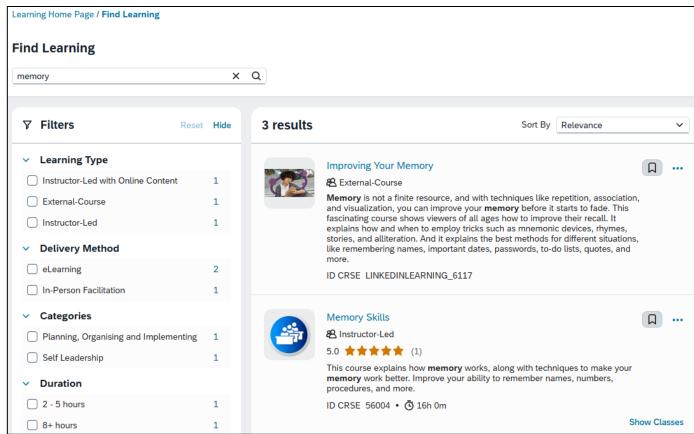


#### **Procedure**

1. Log in to SuccessFactors and access the Learning page.

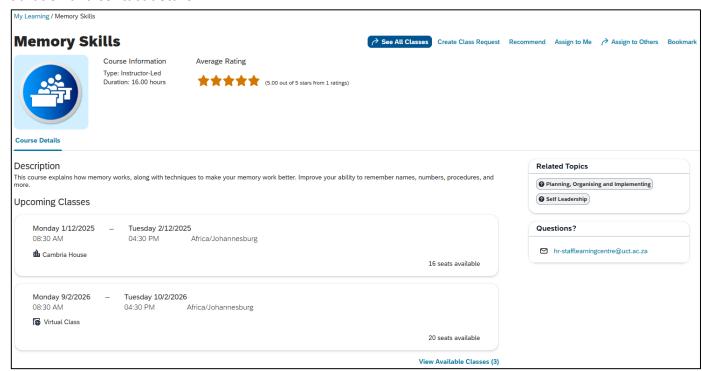


- Seach for a course in the course library by entering a search term/keyword in the *Search for Learning* field or click *Browse all courses*.
- 2. The *Find Learning* page appears.

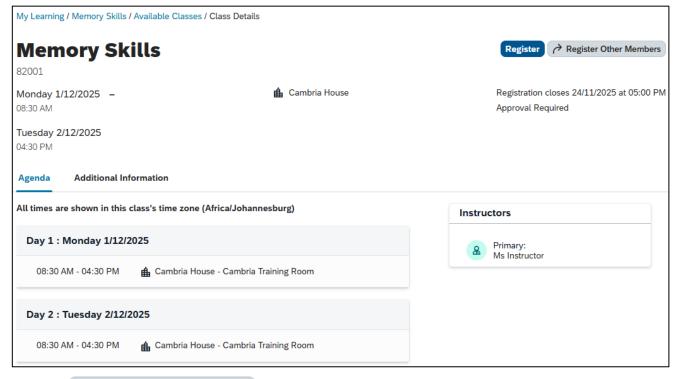


- Click the course title e.g. Memory Skills.

3. A new browser window/tab opens, showing detailed course information such as the course description, duration and contact details.

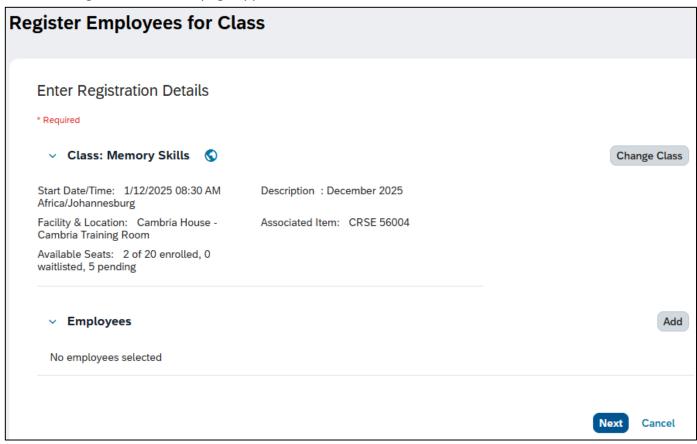


- Available classes are listed in the *Upcoming Classes* section including start and end dates, location or virtual class indicator and number of available seats. If there are more than 2 classes, click *View* Available Classes to see the full list.
- Click a class to complete the registration.
- 4. The *Class Details* page appears. This page shows the class time slots, instructor, registration close time/date (if applicable) and whether registration requires manager approval.

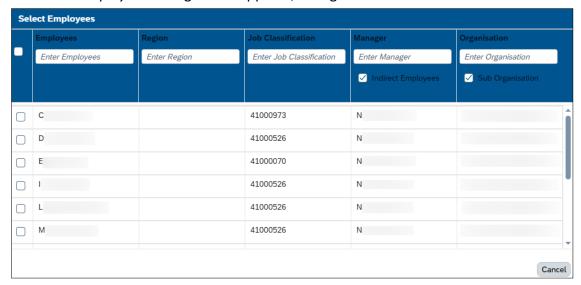


- Click Register Other Members

5. The Enter Registration Details page appears.

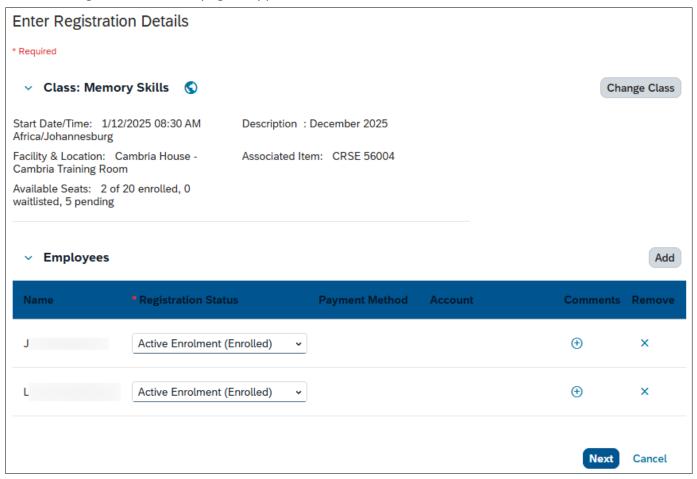


- Click Add on the right (in line with the *Employees* heading) to choose one or more team members.
- 6. The Select Employees dialogue box appears, listing all current team members.

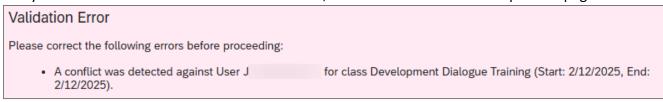


- Select individual employees using the  $\square$  checkboxes or click  $\square$  in the top left to select all employees. If a team member is already registered for this course, you will be not be able to select them.
- As employees are selected, a message in the bottom left of the dialogue box confirms the number of employees selected.
- When all required employees are selected, click
   Note: The Add button only appears after at least one employee is selected.

7. The Enter Registration Details page reappears.



If any of the selected team members have a clash, it will be indicated at the top of the page.



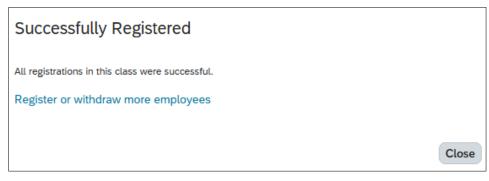
- Click Next
- If the team member recently completed the course, you will receive a warning message. Click No to cancel the registration.



8. The Confirm Registration Details page appears.

Confirm Registration I	Details						
Class: Memory Skills							
Start Date/Time: 1/12/2025 08 Facility & Location: Cambria H	8:30 AM Africa/Johannesburg House - Cambria Training Room	Description: December 2025 Associated Item: CRSE 5600					
Dietary Requirements:							
Food Allergies:							
Disability Accommodations Requirements:							
Employees Name	Registration Status Payment	Method Comments					
D	Active Enrolment(Enrolled)						
V	Active Enrolment(Enrolled)						
Notify:  Users Instructors	☐ Managers ☐ Others						
			Finish Registration	Cancel			

- If the registration requires additional information (i.e. fund number, cost centre, email address of fund holder, dietary requirements, food allergies and disability requirements), complete the fields for the selected employee/s. **Note**: All additional information entered applies to all selected employees. If the information differs per employee (e.g. food allergies), then register each employee individually for the class.
- Click Finish Registration
- 9. The Successfully Registered page appears.



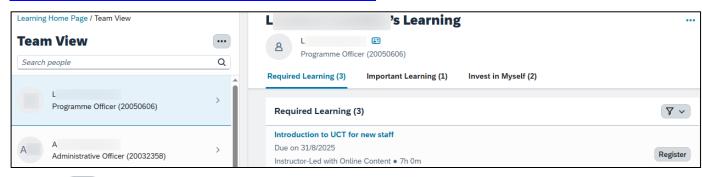
- Click Close

- 10. The Class Details page reappears.
  - Close the browser tab to return to the Learning search and click *Learning Home Page*.
  - Click to review team member learning plans. The assignment type chosen for each course determines the section the registration appears in for the team member. Required courses appear in the *Required Learning* section and recommended or optional courses appear in the *Important Learning* section.

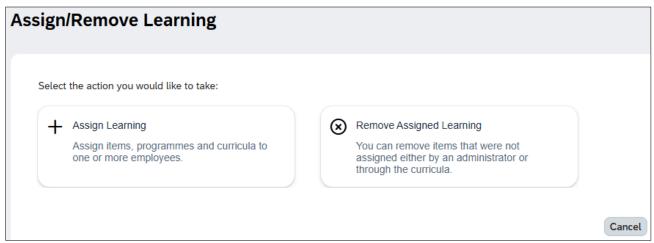


#### **Procedure**

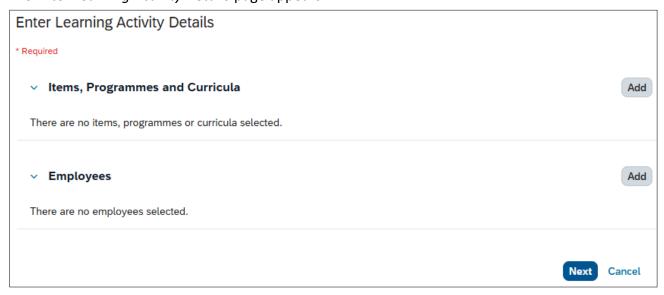
1. Log in to SuccessFactors and access the Team View page.



- Click More manager actions (top left) and choose Manage Assignments.
- 2. The Assign/Remove Learning page appears.

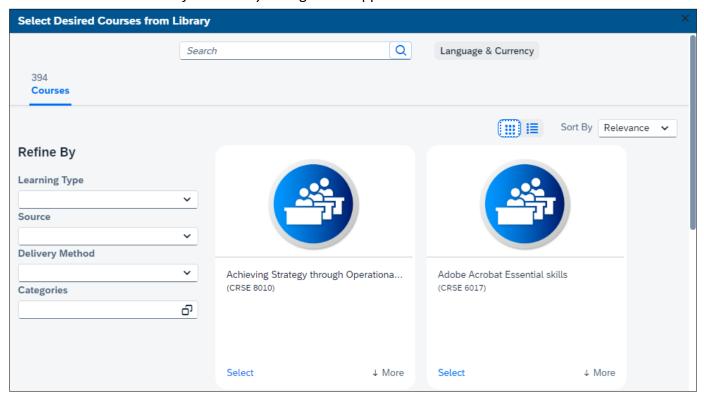


- Click Assign Learning.
- 3. The Enter Learning Activity Details page appears.

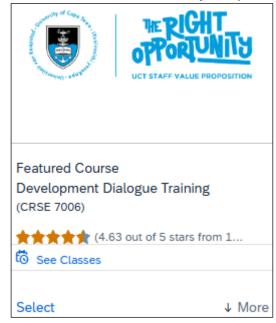


- To choose courses (learning items) or programmes to assign to team members, click on the right (in line with the *Items, Programmes and Curricula* heading).

4. The Select Desired Courses from Library dialogue box appears.

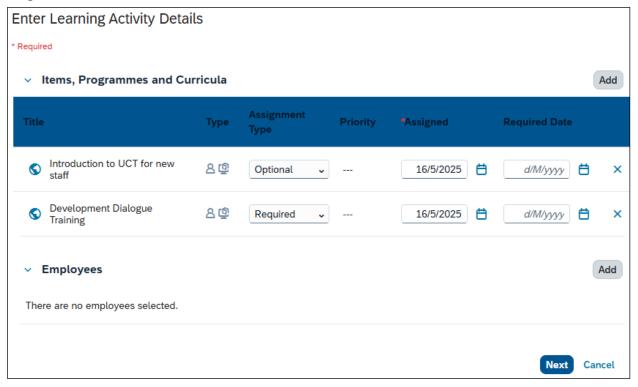


- Use the Search field or the Refine By section to find the course to assign.

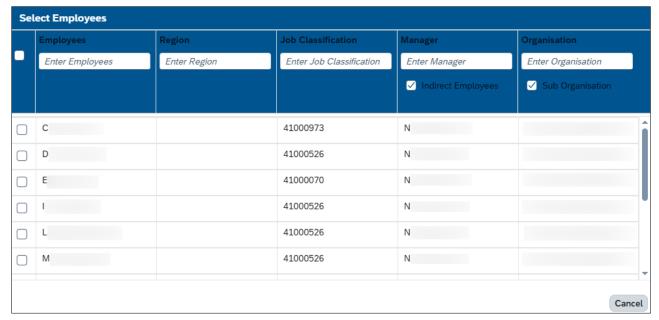


- Click Select.
- The text at the bottom of the course tile changes to Selected.
- Repeat the search steps above and select any other courses to assign.
- Click Z Close in the top right of the dialogue box.

5. The *Enter Learning Activity Details* page reappears, displaying the selected course(s) in the *Items, Programs and Curricula* section.

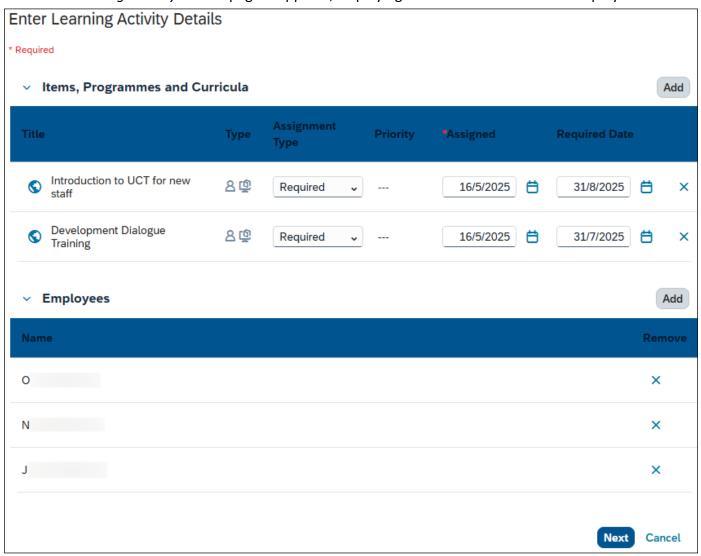


- If appropriate, change the Assignment Type (e.g. required, recommended, optional) for each course.
- If the course must be completed by a specific date, use the Required Date field.
- To choose one or more employees, click Add on the right (in line with the *Employees* heading).
- 6. The Select Employees dialogue box appears, listing all current team members.



- Select individual employees using the  $\square$  checkboxes or click  $\square$  in the top left to select all employees.
- As employees are selected, a message in the bottom left of the dialogue box confirms the number of employees selected.
- When all required employees are selected, click
   Note: The Add button only appears after at least one employee is selected.

7. The Enter Learning Activity Details page reappears, displaying the selected courses and employees.

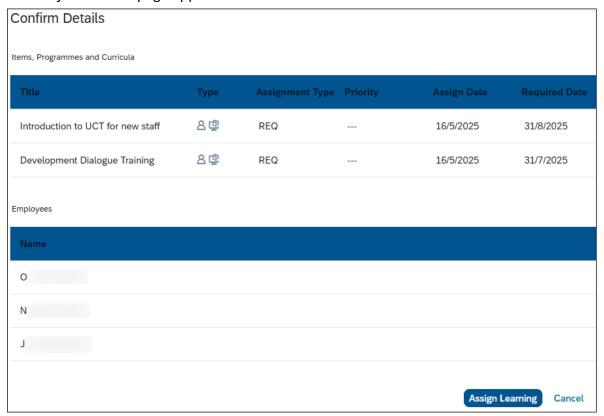


- Click Next
- 8. If applicable, the *Warning Details* page appears displaying courses that are already assigned to or previously completed by the selected employees. If the warning doesn't appear, skip to step 9.

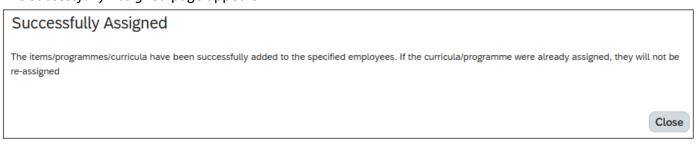


- Click Yes to proceed or click No to return to the Enter Learning Activity Details page to make changes to the selected courses and employees.

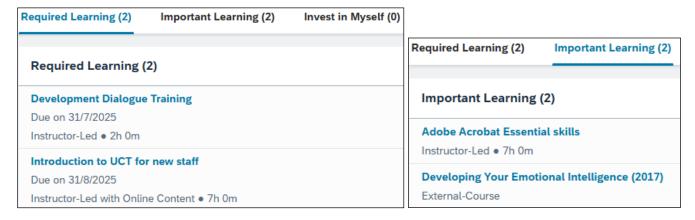
9. The Confirm Details page appears.



- Click Assign Learning
- 10. The Successfully Assigned page appears.



- Click Close to return to the *Team View* page.
- The assignment type chosen for each course, determines the section it appears in for the team member. Required courses appear in the *Required Learning* section and recommended or optional courses appear in the *Important Learning* section.



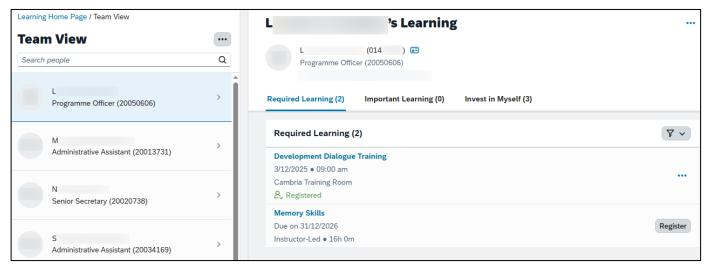
### Registering a team member on a course in Team View

#### Before you begin

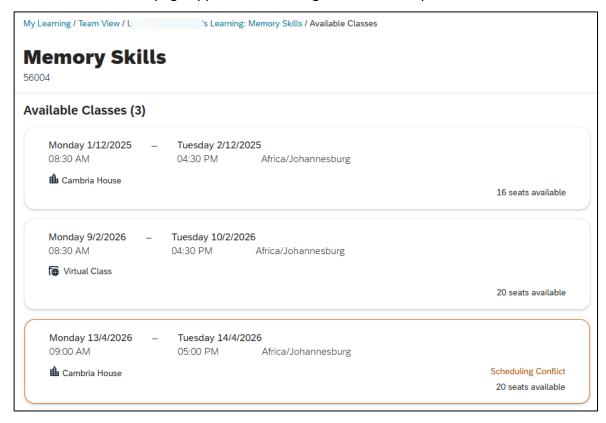
This procedure covers registering a team member on a course that is already on their learning plan (assigned to them). If the course is not on their learning plan, see: Registering team members on a course from the course library.

#### **Procedure**

1. Log in to SuccessFactors and access the *Team View* page.



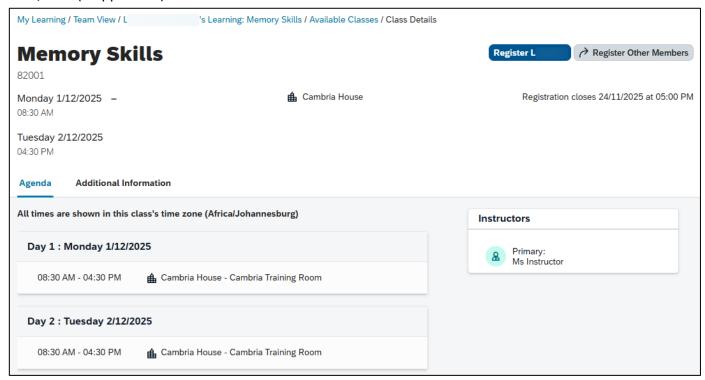
- Find the course in the appropriate section (*Required Learning, Important Learning* or *Invest in Myself*) and click Register alongside the course.
- 2. The Available Classes page appears. Scheduling conflicts for any of the classes will be indicated.



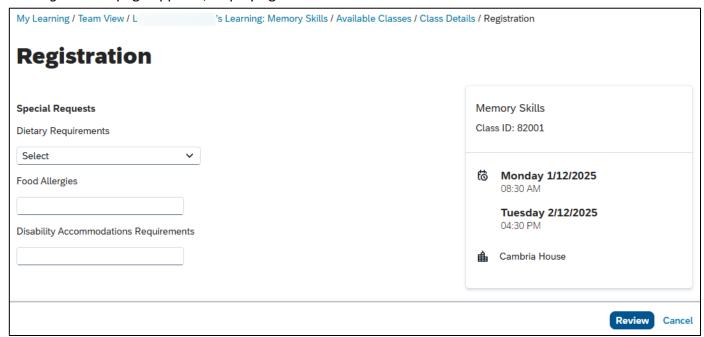
- The available classes are listed including start and end dates, location or virtual class indicator and number of available seats.
- Click a class to complete the registration.

### Registering a team member on a course in Team View (cont)

3. The *Class Details* page appears. This page shows the class time slots, instructor and registration close time/date (if applicable).



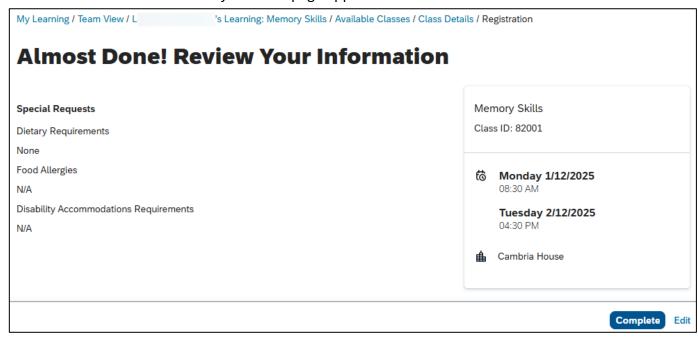
- Click Register L
- 4. The Registration page appears, displaying the selected class details.



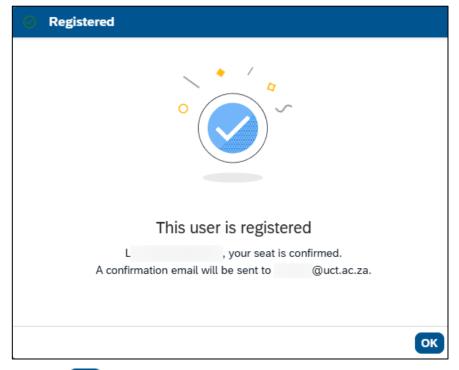
- Complete any fields appearing in the Special Requests section e.g. Fund Number, Cost Centre, Dietary Requirements, Food Allergies, Disability Accommodations Requirements.
- Click Review

### Registering a team member on a course in Team View (cont)

5. The Almost Done! Review Your Information page appears.



- Review your registration information, click Edit to make changes.
- Click Complete
- 6. The Registered dialogue box appears, indicating the team member is registered for the class.

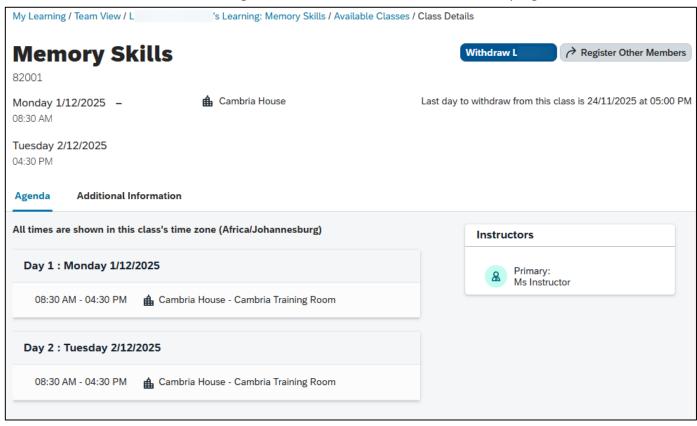


- Click Ok

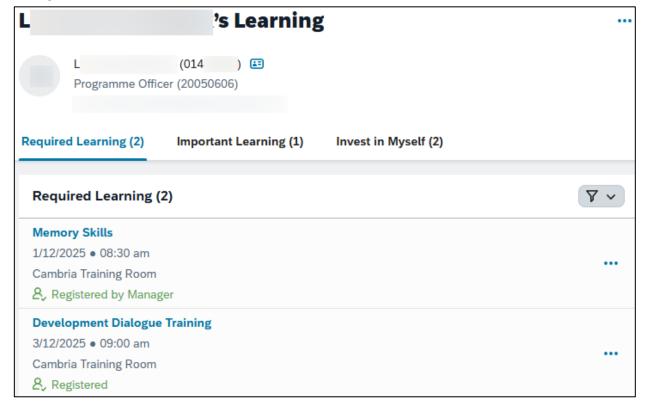
### Registering a team member on a course in Team View (cont)

7. The Class Details page reappears.

If the course has a withdrawal closing date, the information is shown in the top right.

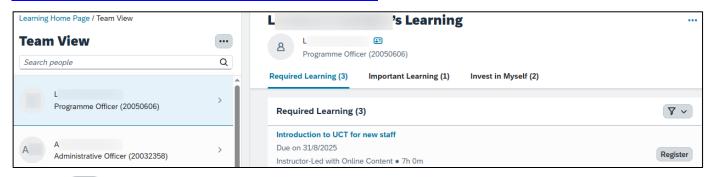


 Click Team View to return to the Team View page. The registration indicates that it was completed by the manager.

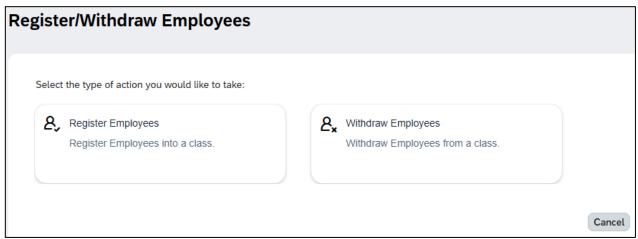


#### **Procedure**

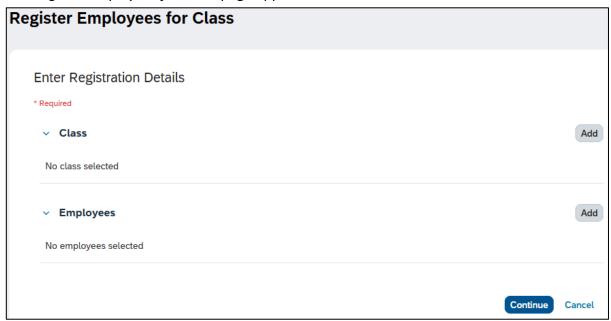
1. Log in to SuccessFactors and access the Team View page.



- Click More manager actions (top left) and choose Manage Enrolment.
- 2. The Register/Withdraw Employees page appears.

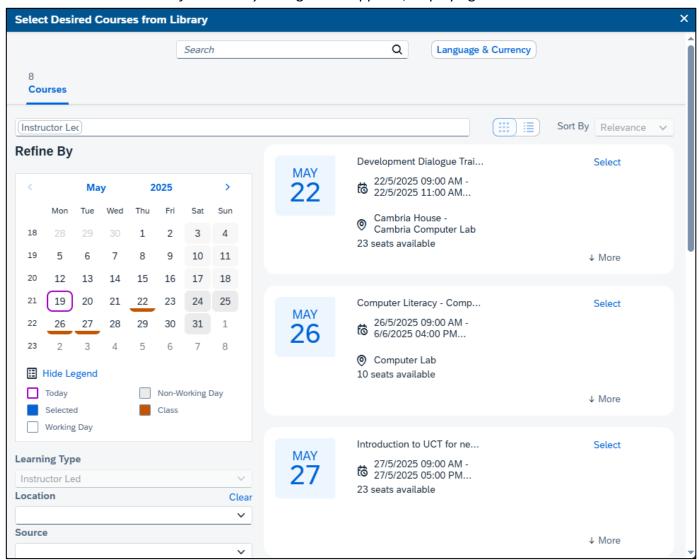


- Click Register Employees.
- 3. The Register Employees for Class page appears.



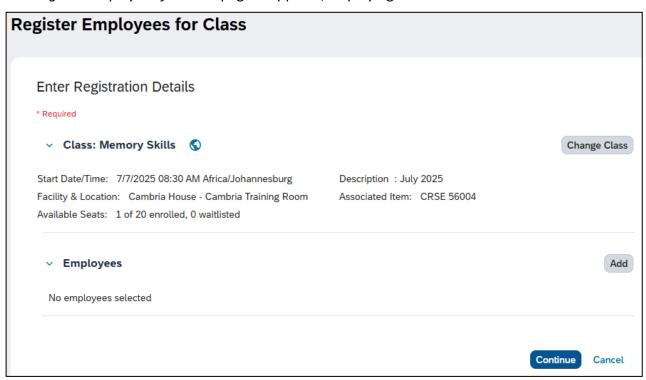
- To choose a scheduled class to register an employee on, click on the right (in line with the *Class* heading).

4. The Select Desired Courses from Library dialogue box appears, displaying all available classes.

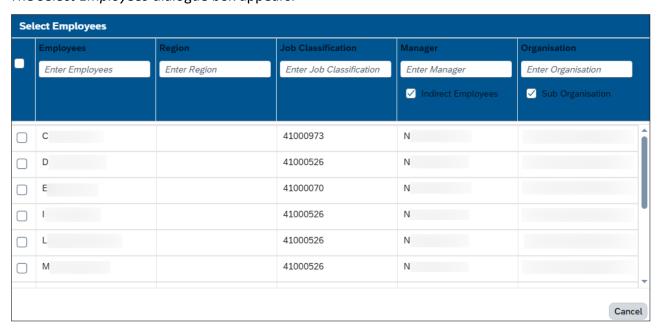


- Scroll down to view the list of scheduled classes, the arrow buttons at the bottom can be used to view additional pages. Use the *Search* field at the top of the page to find a specific class.
- Click ↓ More to view additional information. Click ↑ Less to close.
- Click Select in the class tile.

5. The Register Employees for Class page reappears, displaying the details of the selected class.



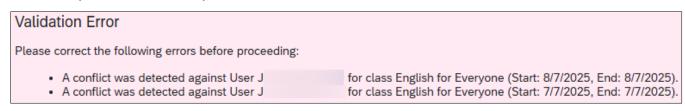
- To register one or more employees, click Add on the right (in line with Employees).
- 6. The Select Employees dialogue box appears.



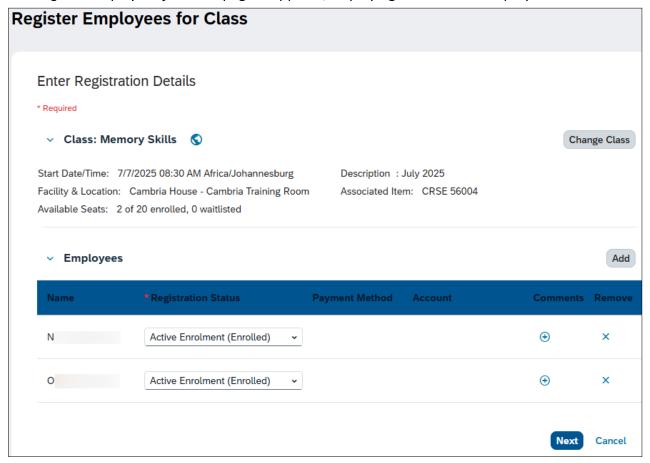
- Select individual employees using the  $\square$  checkboxes or click  $\square$  in the top left to select all employees. **Note**: You will not be able to select a team member that is already registered for the class. The checkboxes for these team members will appear with a lighter coloured tick indicator  $\square$ .
- As employees are selected, a message in the bottom left of the dialogue box confirms the number of employees selected.
- When all required employees are selected, click
   Note: The Add button only appears after at least one employee is selected.

7. If no validation error appears, skip to step 8.

If an employee has a conflict because of an existing registration, a validation error at the top of the section will identify each class and day conflict.



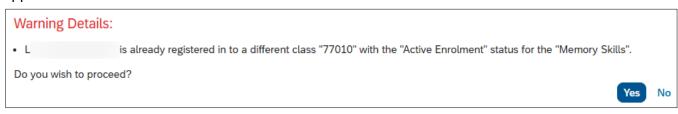
- Either choose a different class by clicking Change Class and selecting the appropriate class.
- Or remove the affected employee using the × button in the *Remove* column.
- 8. The Register Employees for Class page reappears, displaying the selected employees.



- To proceed with registering the selected employees, click Next

9. If no warning appears, skip to step 10.

If an employee is already registered on a different class for the same course, the *Warning Details* page appears.

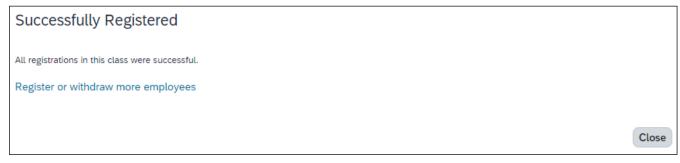


Click Yes to proceed or click No to return to the previous page to make changes.

10. The Register Employees for Class page reappears, displaying the Confirm Registration Details section.

Register Employees	for Class				
Confirm Registration	Details				
Class: Memory Skills					
Start Date/Time: 7/7/2025 08 Facility & Location: Cambria			n: July 2025 Item: CRSE 56004		
Dietary Requirements:					
Food Allergies:					
Disability Accommodations R	equirements: [				
Employees					
Name	Registration Status	Payment Method	Comments		
С	Active Enrolment(Enrolled)				
Е	Active Enrolment(Enrolled)				
Notify:  Users Instructors	☐ Managers ☐ Oth	ners			
				Finish Registration	Cancel

- If the registration requires additional information (i.e. fund number, cost centre, email address of fund holder, dietary requirements, food allergies and disability requirements), complete the fields for the selected employee/s. Note: All additional information entered applies to all selected employees. If the information differs per employee (e.g. food allergies), then register each employee individually for the class.
- Click Finish Registration
- 11. The Successfully Registered page appears.

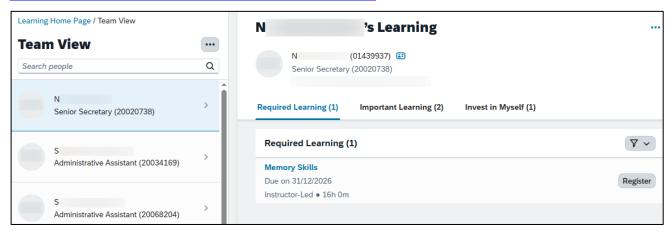


- Click Close to return to the *Team View* page.

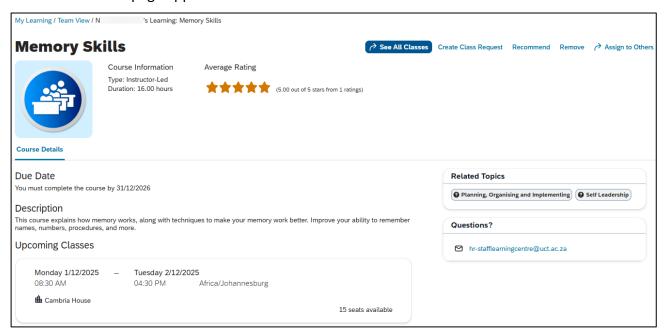
## Removing assigned learning from one team member in Team View

#### **Procedure**

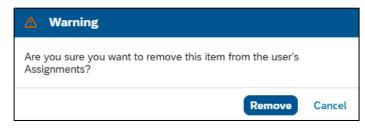
1. Log in to SuccessFactors and access the *Team View* page.



- Find the course in the appropriate section (Required Learning, Important Learning or Invest in Myself).
- Click the course title e.g. Memory Skills.
- 2. The course details page appears.



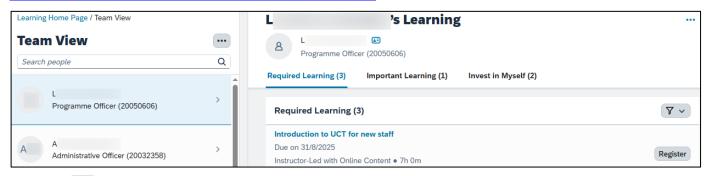
- Click Remove.
- 3. The Warning dialogue box appears.



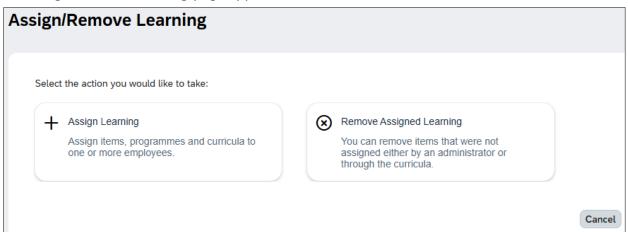
- Click Remove
- A message briefly appears near the bottom of the page, confirming the course was removed.
- Click Team View to return to the Team View page.

#### **Procedure**

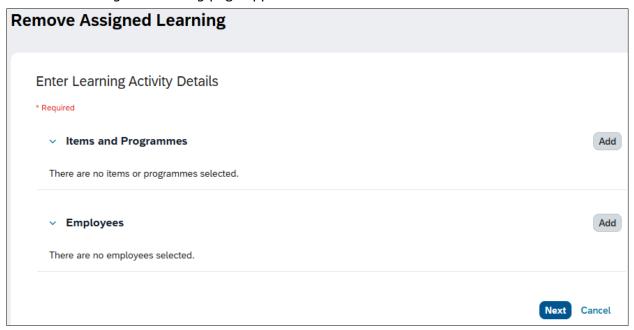
1. Log in to SuccessFactors and access the Team View page.



- Click More manager actions (top left) and choose Manage Assignments.
- 2. The Assign/Remove Learning page appears.

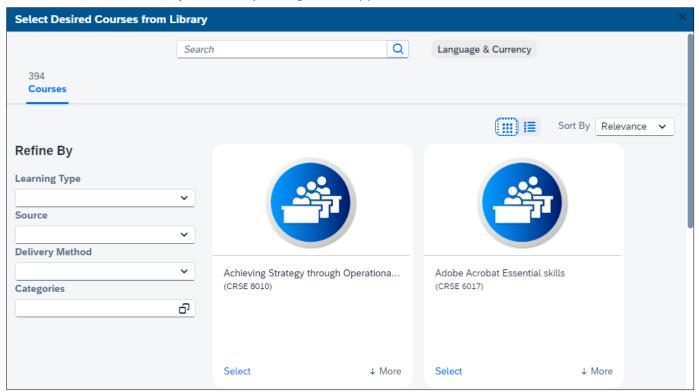


- Click Remove Assigned Learning.
- 3. The Remove Assigned Learning page appears.

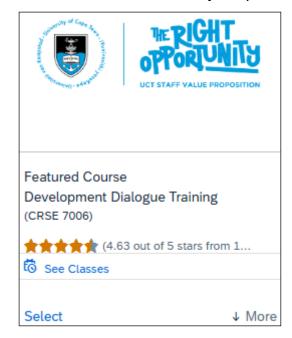


- To choose courses (learning items) or programmes to remove from team members, click on the right (in line with the *Items and Programmes* heading).

4. The Select Desired Courses from Library dialogue box appears.

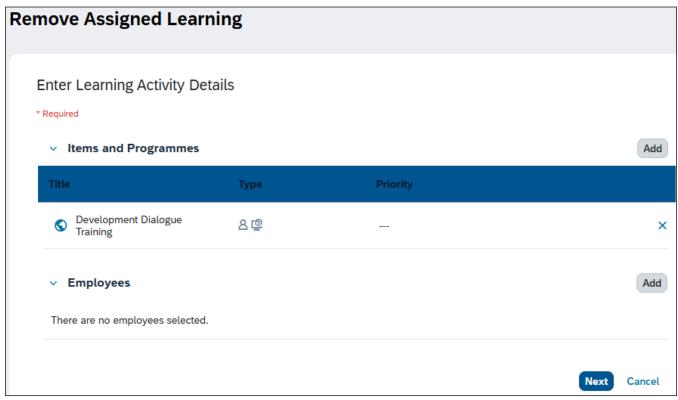


- Use the Search field or the Refine By section to find the course to assign.

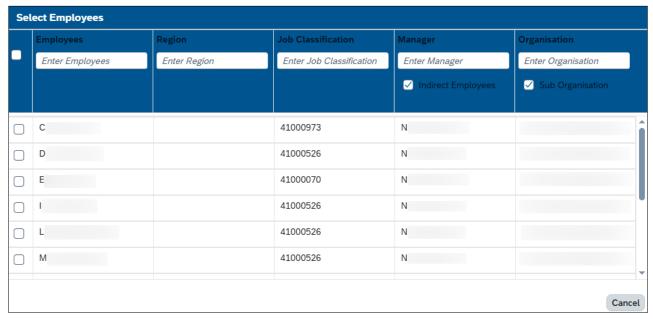


- Click Select.
- The text at the bottom of the course tile changes to Selected.
- Repeat the search steps above and select any other courses to remove.
- Click Close in the top right of the dialogue box.

5. The *Remove Assigned Learning* page reappears, displaying the selected course(s) in the *Items and Programmes* section.

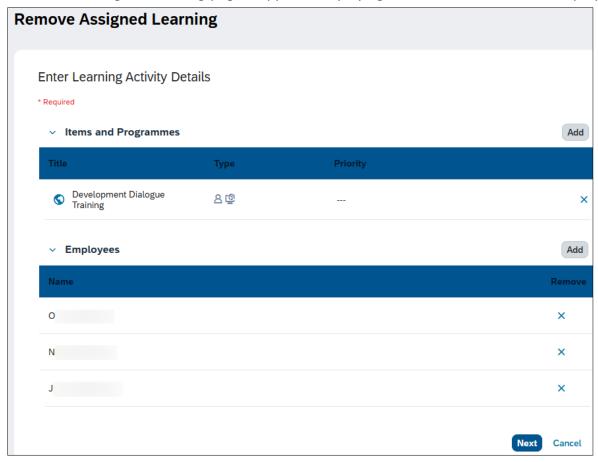


- To choose one or more employees, click Add on the right (in line with the *Employees* heading).
- 6. The Select Employees dialogue box appears, listing all current team members.

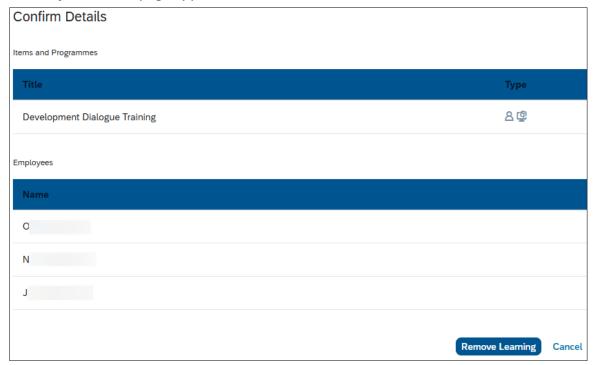


- Select individual employees using the  $\square$  checkboxes or click  $\square$  in the top left to select all employees.
- As employees are selected, a message in the bottom left of the dialogue box confirms the number of employees selected.
- When all required employees are selected, click Add
   Note: The Add button only appears after at least one employee is selected.

7. The Remove Assigned Learning page reappears, displaying the selected courses and employees.



- Click Next
- 8. The Confirm Details page appears.



- Click Remove Learning

Note: If an employee has already registered to attend a class, this will also be removed.

9. The *Remove Assigned Learning* page reappears, indicating that the assigned learning was successfully removed from the selected employees.

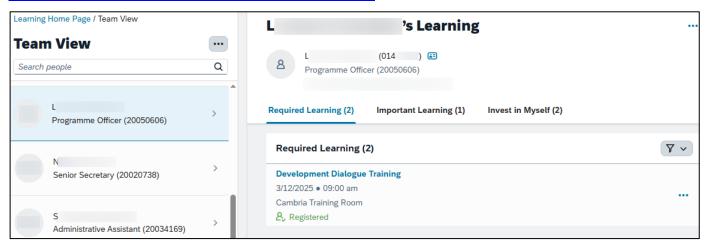


- Click Close to return to the *Team View* page.

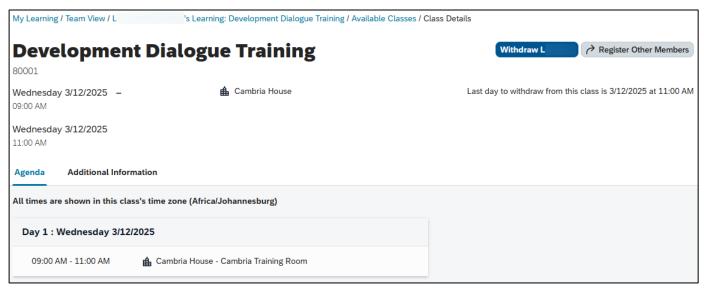
## Withdrawing one team member from a class in Team View

#### **Procedure**

1. Log in to SuccessFactors and access the Team View page.



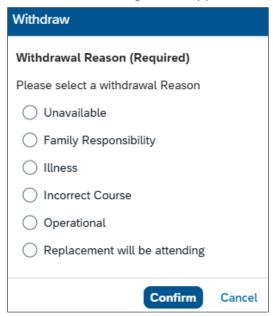
- Find the class/registered course in the appropriate section (*Required Learning, Important Learning* or *Invest in Myself*).
- Click More Actions on the right, in the same line and choose Withdraw.
- 2. The class details page appears.



- Click Withdraw L

# Withdrawing one team member from a class in Team View (continued)

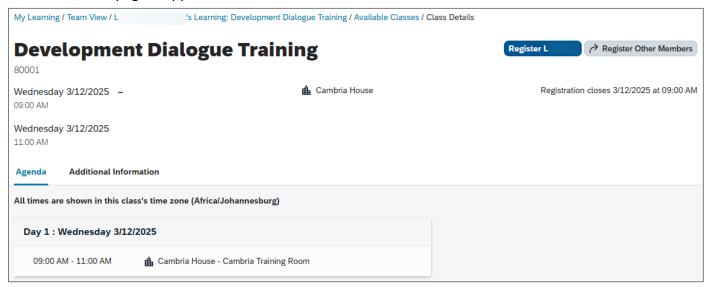
3. The Withdraw dialogue box appears.



- Select the appropriate Withdrawal Reason.
- Click Confirm
- 4. The Information dialogue box appears.



- Click OK.
- 5. The class details page reappears.

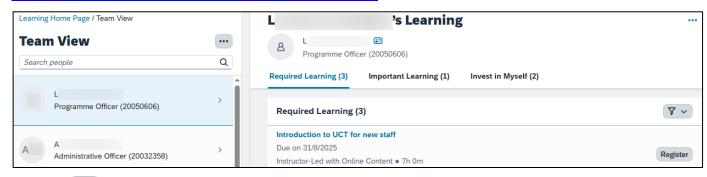


- Click *Team View* to return to the *Team View* page.

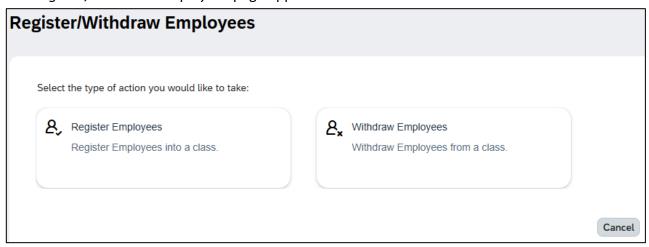
## Withdrawing multiple team members from a class in Team View

#### **Procedure**

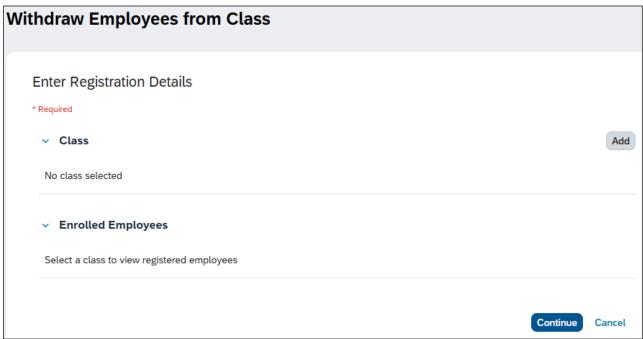
1. Log in to SuccessFactors and access the Team View page.



- Click More manager actions (top left) and choose Manage Enrolment.
- 2. The Register/Withdraw Employees page appears.



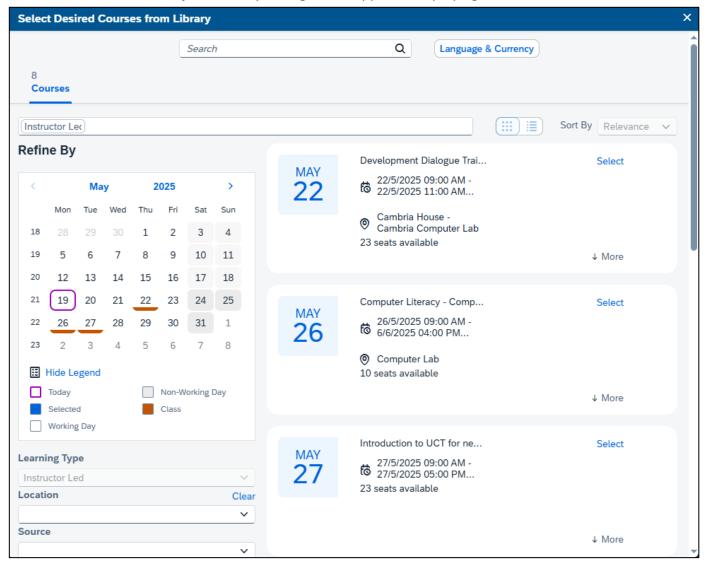
- Click Withdraw Employees.
- 3. The Withdraw Employees from Class page appears.



- To choose a scheduled class to withdraw an employee from, click Add on the right (in line with the Class heading).

# Withdrawing multiple team members from a class in Team View (cont)

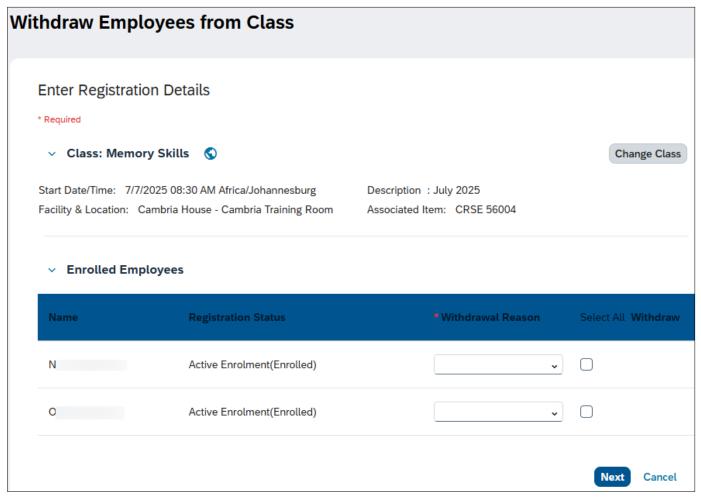
4. The Select Desired Courses from Library dialogue box appears, displaying all available scheduled classes.



- Scroll down to view the list of classes, the arrow buttons at the bottom can be used to view additional pages. Use the *Search* field at the top of the page to find a specific class.
- Click ↓ More to view additional information. Click ↑ Less to close.
- Click Select in the class tile.

# Withdrawing multiple team members from a class in Team View (continued)

5. The Withdraw Employee from Class page reappears, displaying the selected class details. The Enrolled Employees section automatically lists any of your team members currently registered for the class.

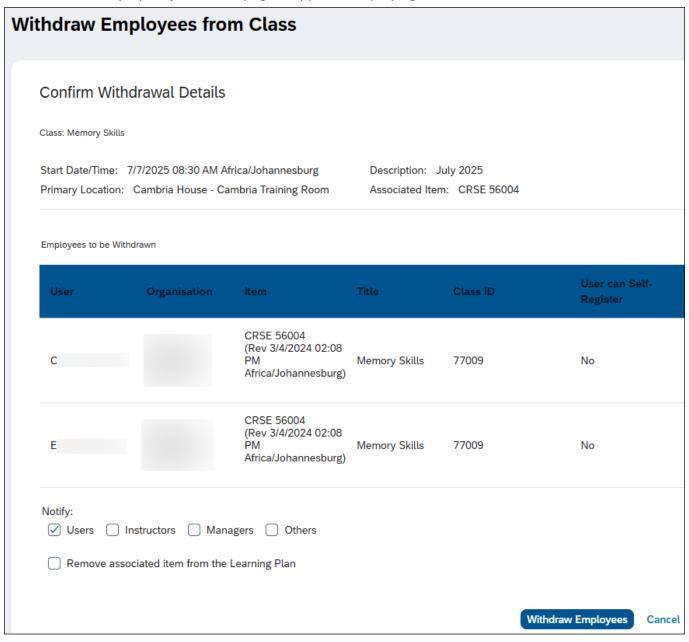


- In the Enrolled Employees section:
  - Select a Withdrawal Reason for each person.
  - Select the employee/s to withdraw using the checkboxes in the Withdraw column on the right.

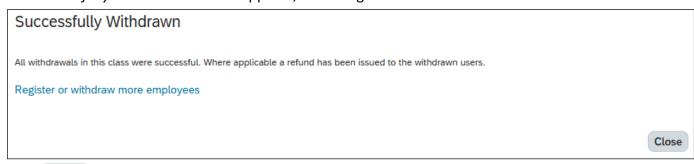
- Click Next

## Withdrawing multiple team members from a class in Team View (continued)

6. The Withdraw Employees from Class page reappears, displaying the confirmation of withdrawal details.



- If the course is no longer needed for the employee's role, select the *Remove associated item from the Learning Plan* checkbox.
- Click Withdraw Employees
- 7. The Successfully Withdrawn section appears, indicating all withdrawals were successful.



- Click Close to return to the *Team View* page.

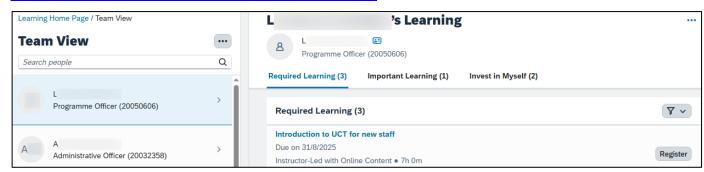
#### Recording external learning for team members

#### Before you begin

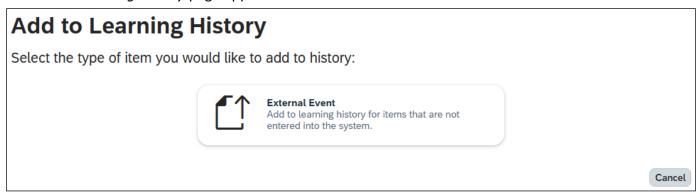
Attendance at external training/learning events outside of UCT can be added to SuccessFactors Learning and will appear in the team member's *Learning History* tile.

#### **Procedure**

1. Log in to SuccessFactors and access the *Team View* page.

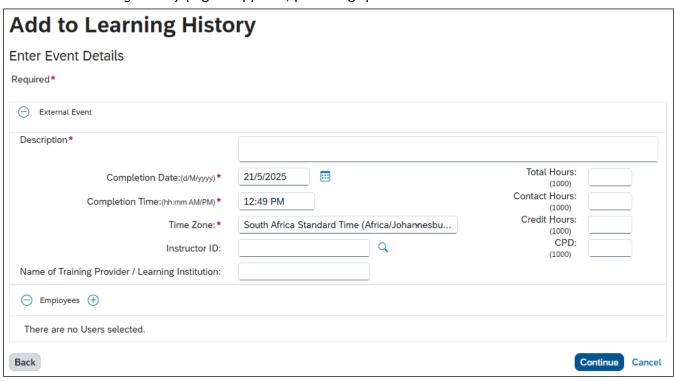


- Click More manager actions (top left) and choose Add to Learning History.
- 2. The Add to Learning History page appears.

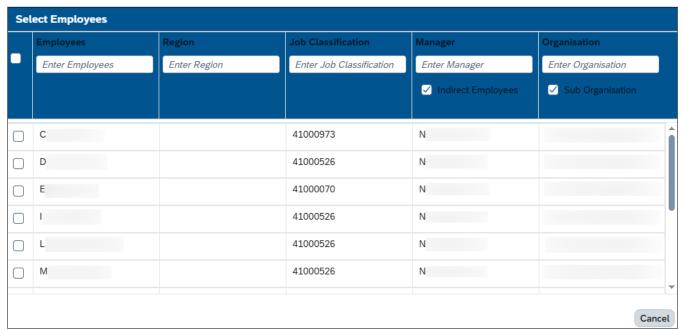


- Click External Event to create a record of the external event that the team member(s) completed.

3. The Add to Learning History page reappears, providing space to enter the event details.

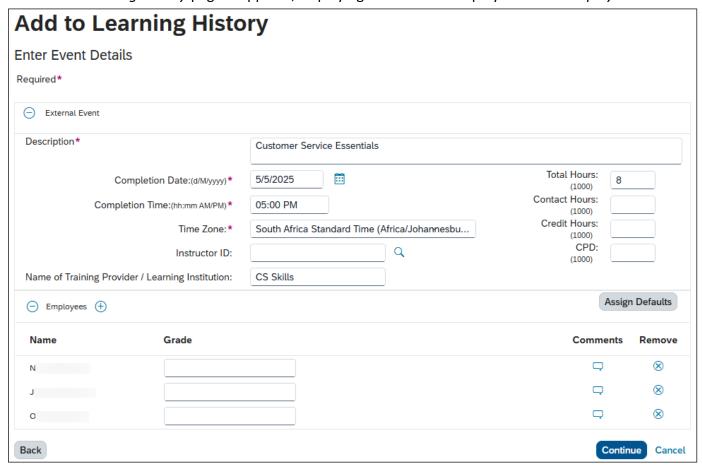


- Enter the event Description, Completion Date, Completion Time and any other useful fields such as Total Hours, Name of Training Provider / Learning Institution.
- Click the EmployeesAdd to add the employees that attended the external event.
- 4. The Select Employees dialogue box appears.



- Select individual employees using the  $\square$  checkboxes or click  $\square$  in the top left to select all employees.
- As employees are selected, a message in the bottom left of the dialogue box confirms the number of employees selected.
- When all required employees are selected, click
   Note: The Add button becomes active when at least one employee is selected.

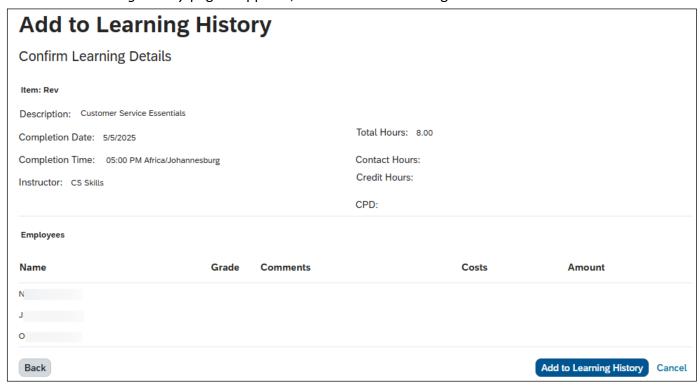
5. The Add to Learning History page reappears, displaying the selected employees in the Employees section.



- If applicable, enter a *Grade* or *Comments* for the external learning.



6. The Add to Learning History page reappears, to confirm the learning details.



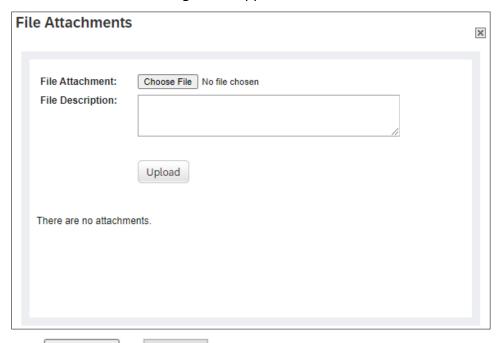
- Click Add to Learning History
- 7. The Add to Learning History page reappears, indicating the learning was recorded successfully.



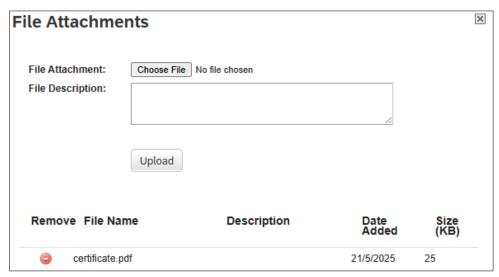
If there are related documents (e.g. certificate) to attach for any of the employees, click
 File Attachments (0)

If there are no documents to attach, skip to step 8.

• The File Attachments dialogue box appears.



- Click Choose File or Browse... (button name may vary depending on the web browser you're using) to select the file on your computer. Note: There is a file upload size limit of 800kb.
- Enter a File Description.
- Click Upload .
- The File Attachments dialogue box refreshes and displays the attachment details.



- Click to close the *File Attachments* dialogue box.
- Repeat from step 7 to add documents for other employees.
- 8. The Add to Learning page reappears, displaying the number of file attachments (if applicable).
  - Click to return to the *Team View* page. The recorded external learning will appear in each team member's *Learning History*.