



UNIVERSITY OF CAPE TOWN
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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.

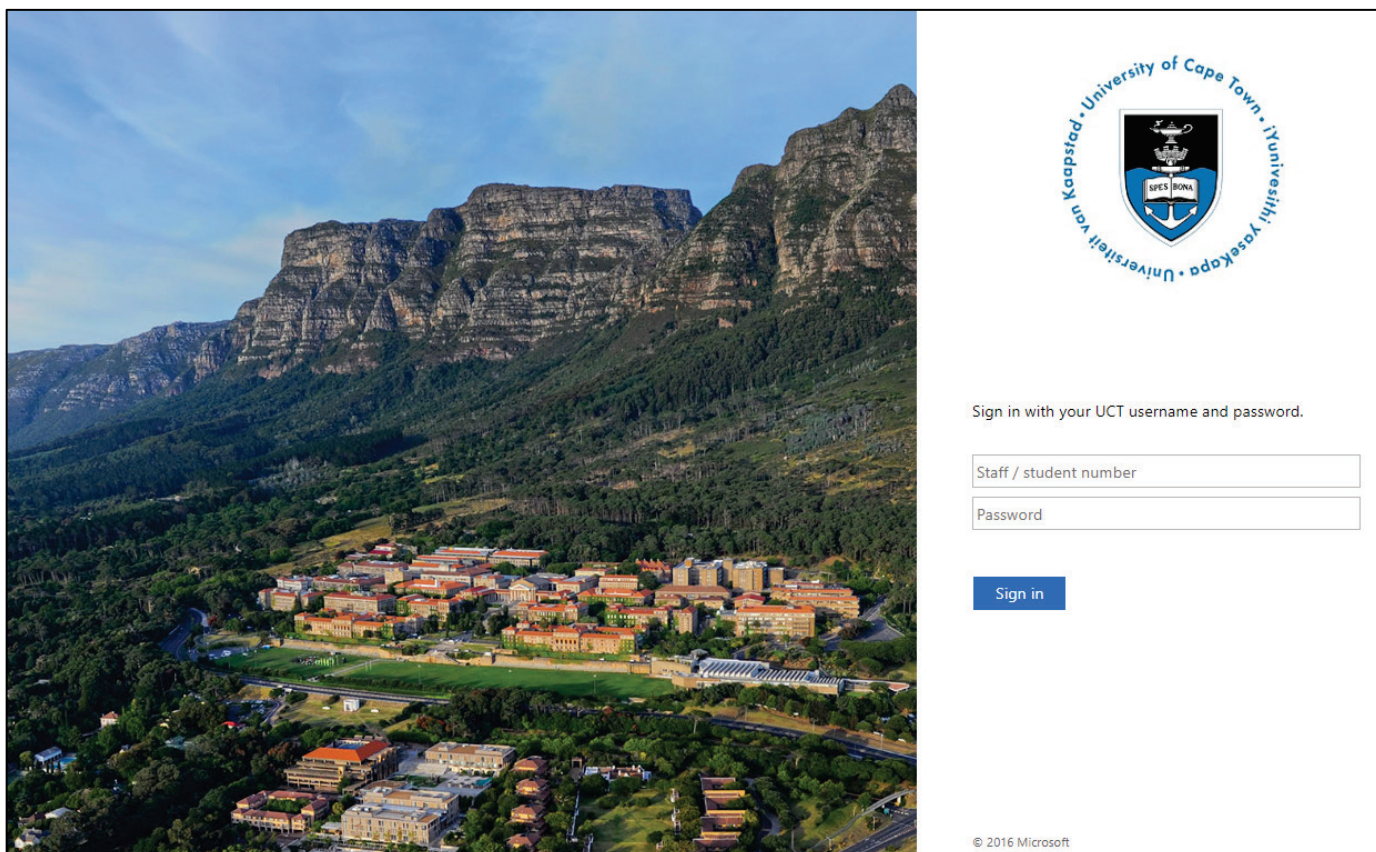
Staff members can access the platform on any internet-connected device (including smart phones and tablets) using their existing UCT login details. Time-consuming manual booking processes are replaced by automated processes with easy workflow for manager approval. Records of completed courses are consolidated 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 [IT Service Desk](#).

Procedure

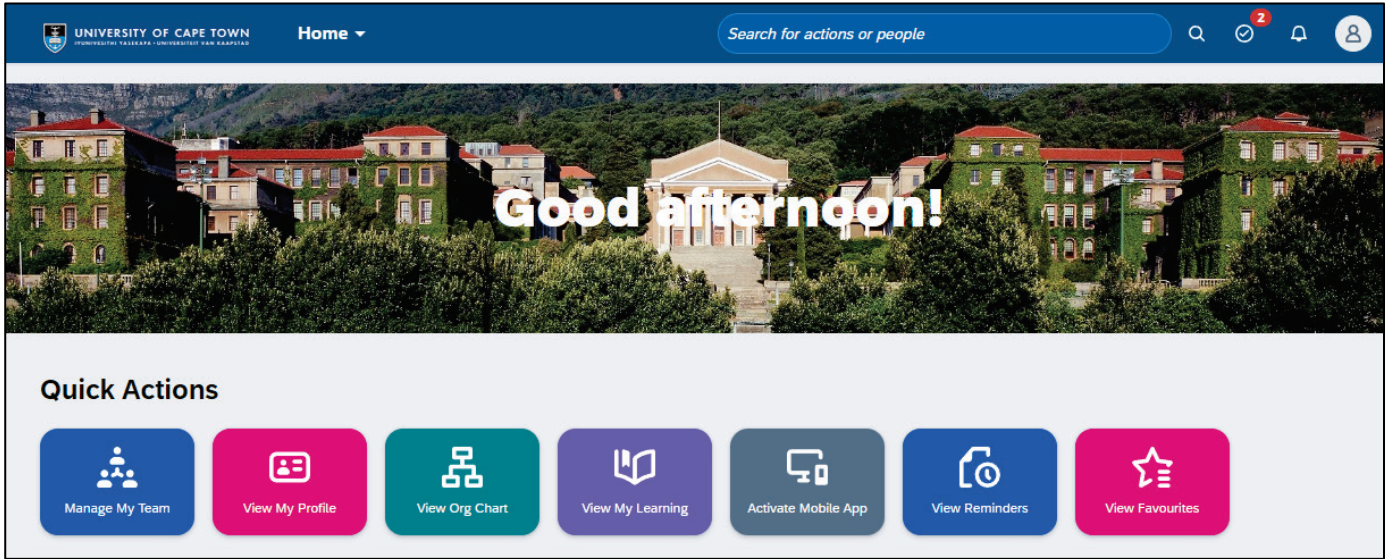
1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
2. Log in to SuccessFactors via www.successfactors.uct.ac.za.
3. If not already logged on to single sign-on, the UCT sign in page appears.
If already logged in to single sign-on, SuccessFactors will open.



- In the *Staff / student* number field, enter your UCT staff number.
Note: UCT staff number only, third party "T" accounts will not work.
- In the *Password* field, enter your network password.
- Click  .

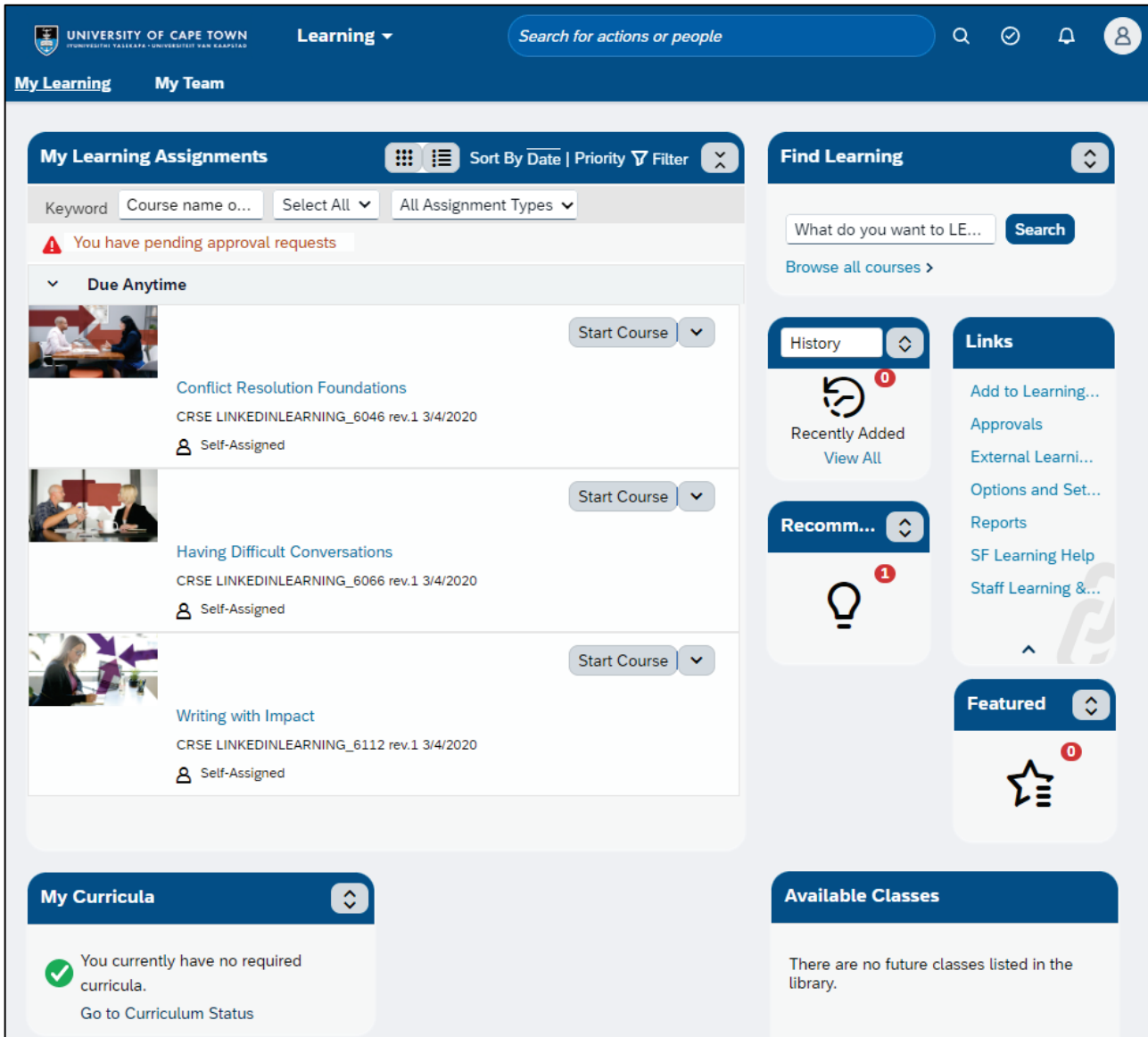
Logging in to SuccessFactors via a browser (continued)

4. The *Home* page appears.



- Click the *View My Learning* tile.

5. The *My Learning* page appears.



- Click **My Team**.

Logging in to SuccessFactors via a browser (continued)

6. The *My Team* page appears.

The screenshot displays the 'My Team' page in SuccessFactors Learning. The main content area shows a learning plan for 'Alta AA Fourie' with the following details:

- Learning Plan:** Alta AA Fourie
- Filters:** Keyword, Course name o..., Select All, All Assignment Types
- Due later:**
 - Development Dialogues:** 31/12/2024 | REQUIRED | Register Now
 - CRSE 7006 rev.1 7/11/2019
 - Assigned by L
- Due Anytime:**
 - Avoiding Burnout:** Self-Assigned
 - CRSE LINKEDINLEARNING_6034 rev.1 3/4/2020
- OPTIONAL:** ENROLLED
 - Business Writing Skills:** ENROLLED
 - CRSE 14004 rev.1 15/7/2020
 - Begins 21/2/2024 at Cambria House
 - Assigned by L

The right sidebar contains the following sections:

- Find Learning:** Find Learning Search, Browse all courses >
- Manager Links:** Add to Learning History, Assign/Remove Learning, Register/Withdraw Employees, Approvals, Dashboard, Reports
- Status: A:** Curricula (No required curricula are assigned), Learning History (1 item completed in the last 30 days)

See:

[Viewing team learning plans and learning history](#)

[Processing pending approval requests](#)

[Assigning learning to team members](#)

[Removing assigned learning from team members](#)

[Registering team members for a class](#)

[Withdrawing team members from a class](#)

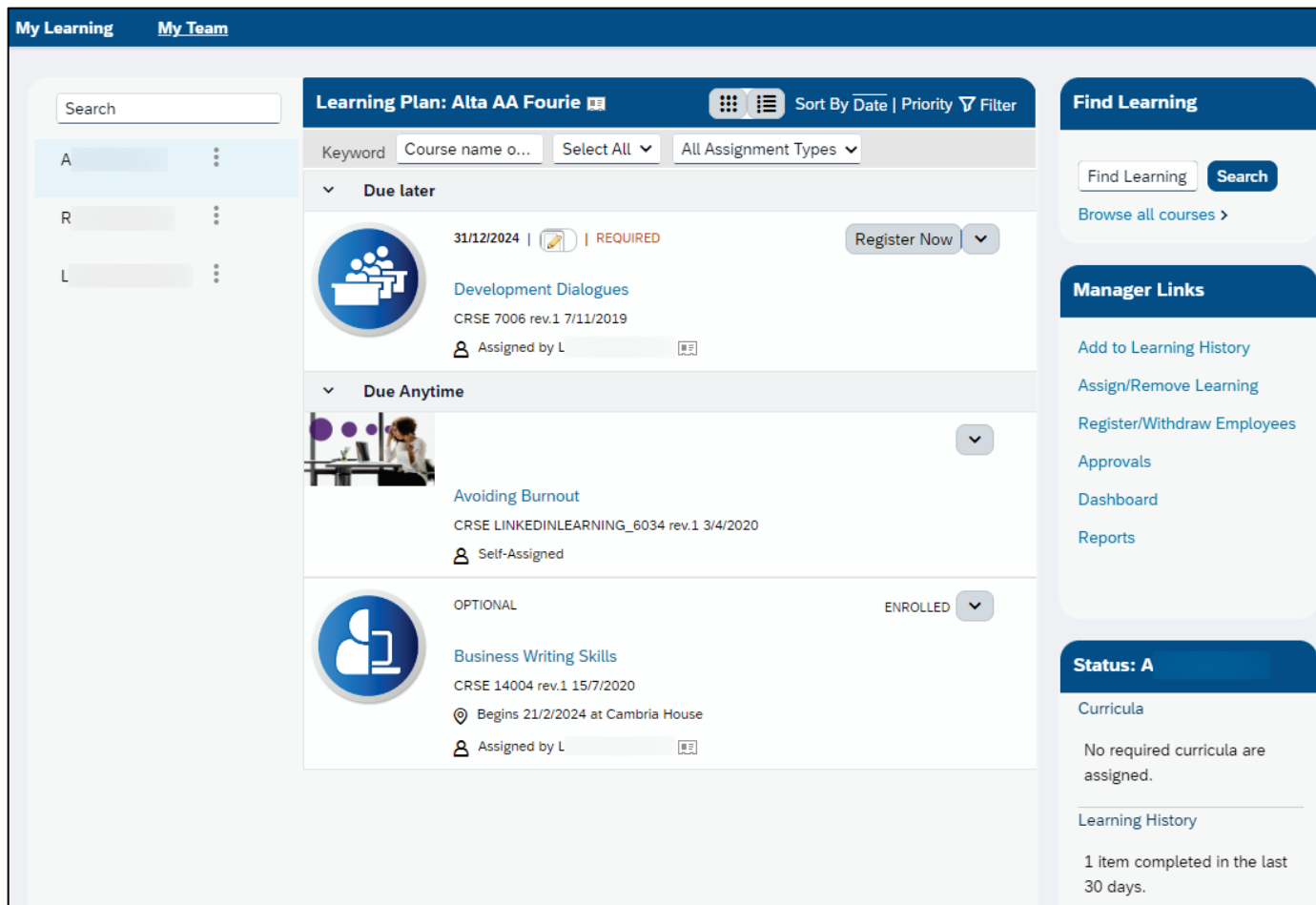
[Changing a team member's learning plan](#)

[Recording external learning](#)

Viewing team learning plans and learning history

Procedure

1. [Log in to SuccessFactors and access the My Team page.](#)



- All employees that report to you are displayed in the column on the left. The first employee’s learning plan is automatically displayed.
- **To view other employee learning plans**, click the appropriate name in the column on the left or use the *Search* field at the top of the column to search for the person.
- **To search for a specific course** within an employee’s learning plan, enter the course name (or part of the name) in the *Keyword* field.
- The **employee’s learning history** in the last 30 days is displayed in the *Status* tile in the bottom right of the page.
 - Click [Learning History](#) to view all completed courses or training events.
 - Click *Close Direct Report Dialog* to return to the *My Team* page.

Processing pending approval requests from the *Home* page

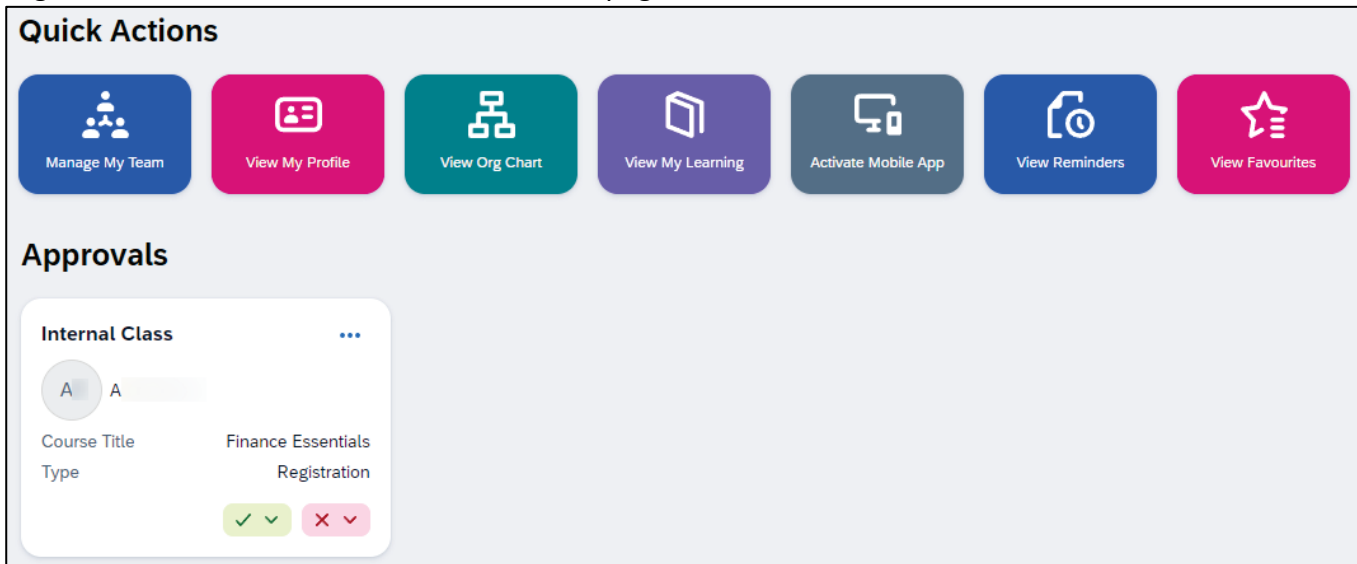
Before you begin

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

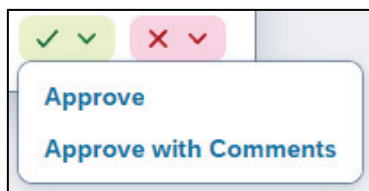
See also: [Processing pending approval request from the *My Team* page.](#)

Procedure

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



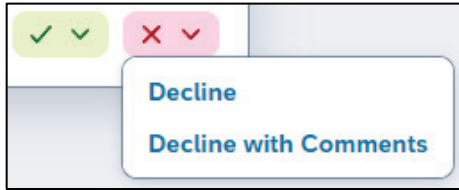
- Any pending approval requests will appear in the *Approvals* section of the *Home* page. If there is more than one pending approval, click *View All*. In the *Internal Class* dialogue box, process the pending approvals using the steps below.
- To view basic class details, click the *Course Title* e.g. 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.
- To **approve a request**, click the green tick:



- Either choose *Approve*. A message briefly appears near the bottom of the screen, 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 screen, indicating that the request was approved.

Processing pending approval requests from the *Home* page (continued)

- To **deny a request**, click the red X:

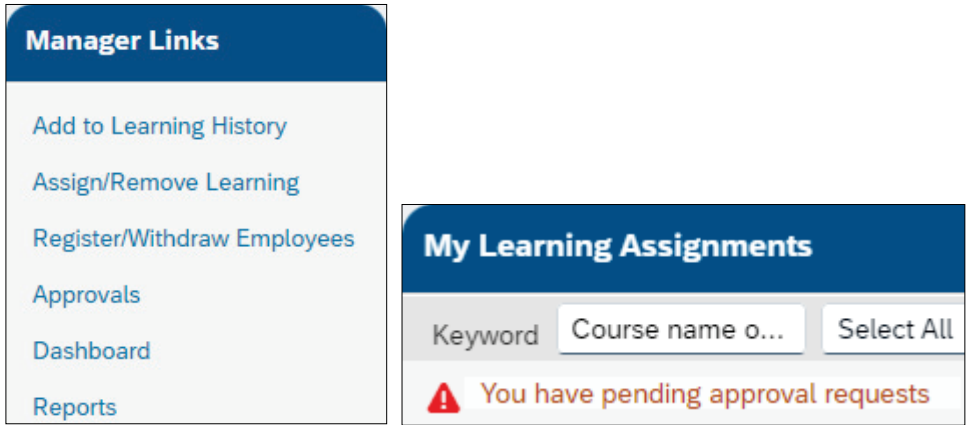


- Either choose *Decline*. The *Confirmation* dialogue box appears, click **Decline**. A message briefly appears near the bottom of the screen, indicating that the request was declined.
- Or choose *Decline with Comments*, complete the *Decline with Comments* dialogue box and click **Decline**. The *Confirmation*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

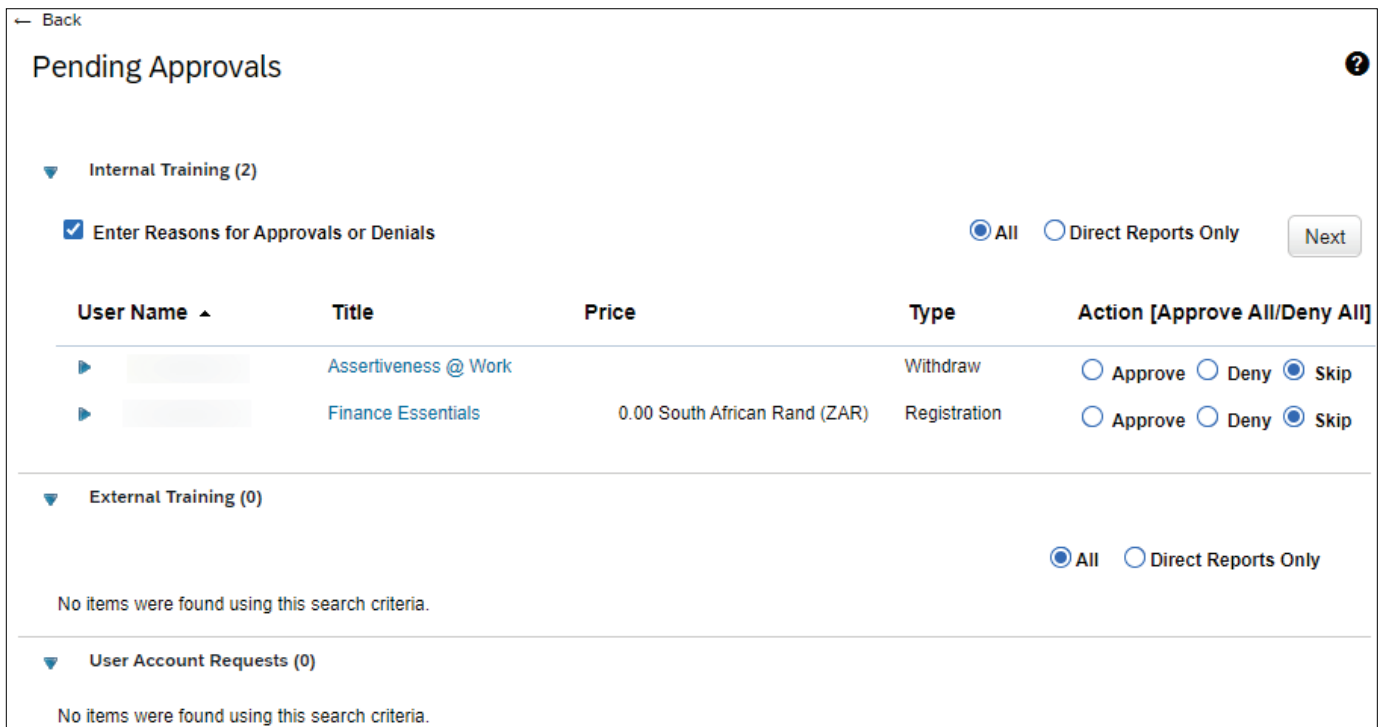
Processing pending approval requests from the *My Team* page

Procedure

1. [Log in to SuccessFactors and access the *My Team* page.](#)
 - In the *Manager Links* tile, click *Approvals*.
 - Note:** You can also access your pending approval requests via the *My Learning Assignments* tile on the *My Learning* page.



2. The *Pending Approvals* page appears, showing any approval requests for class registrations and withdrawals.



- To view the class details, click the name of the class in the *Title* column e.g. Finance Essentials. Click *Back* in the browser to return to the approvals.
- Select the *Approve*, *Deny* or *Skip* radio button for each approval request.
- Note:** If you choose *Skip*, the approval request will remain in a pending state.
- Click .

Processing pending approval requests from the *My Team* page (continued)

- The *Pending Approvals* page reappears, displaying one or more of your selected approval requests. Depending on the number of requests and the selections you made, you may have a page per request or find requests grouped together. Text on the page will indicate whether you are approving or denying a request.

Single approval example

Pending Approvals Help

Approve or Deny → Approval Reasons

Enter a reason for approving your employee's training request below.

Previous Next

Approval Reasons

User Name and Schedule	Approval Reason (optional)
Finance Essentials	

Single denial example

Pending Approvals Help

Approve or Deny → Denial Reasons

Enter a reason for denying your employee's training request below.

Previous Next

Denial Reasons

User Name and Schedule	Denial Reason (optional)
Finance Essentials	

Multiple approval example

Pending Approvals Help

Approve or Deny → Approval Reasons

Enter a reason for approving your employee's training request below.

Previous Next

Approval Reasons

User Name and Schedule	Approval Reason (optional)
Finance Essentials	
Assertiveness @ Work	

- If appropriate, enter an approval or denial reason in the space(s) provided.
- Click Next.

Note: If you are processing more than one request, clicking Next may display the next request. Continue entering approval or denial reasons as required.

Processing pending approval requests from the *My Team* page (continued)

4. The *Pending Approvals* page reappears, listing the requests being approved and/or denied.

Pending Approvals

Approve or Deny → Approval Reasons → Denial Reasons → **Confirm**

Approve

User Name	Title	Price	Cancellation Policy
	Finance Essentials	0.00	South African Rand (ZAR)

Deny

User Name	Title	Price	Cancellation Policy
	Assertiveness @ Work		

- Click .

5. The *Pending Approvals* page reappears, indicating that the pending approval requests were successfully processed.

← Back

Pending Approvals [Help](#)

Approve or Deny → Approval Reasons → Denial Reasons → Confirm → **Success**

Success

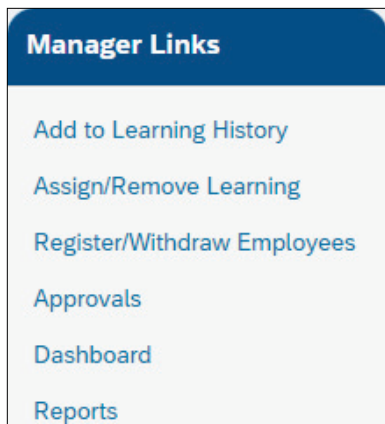
You have successfully completed the employee approval and denial process. Email notifications have been sent to all affected Users.

- Click [My Team](#) to return to the *My Team* page.

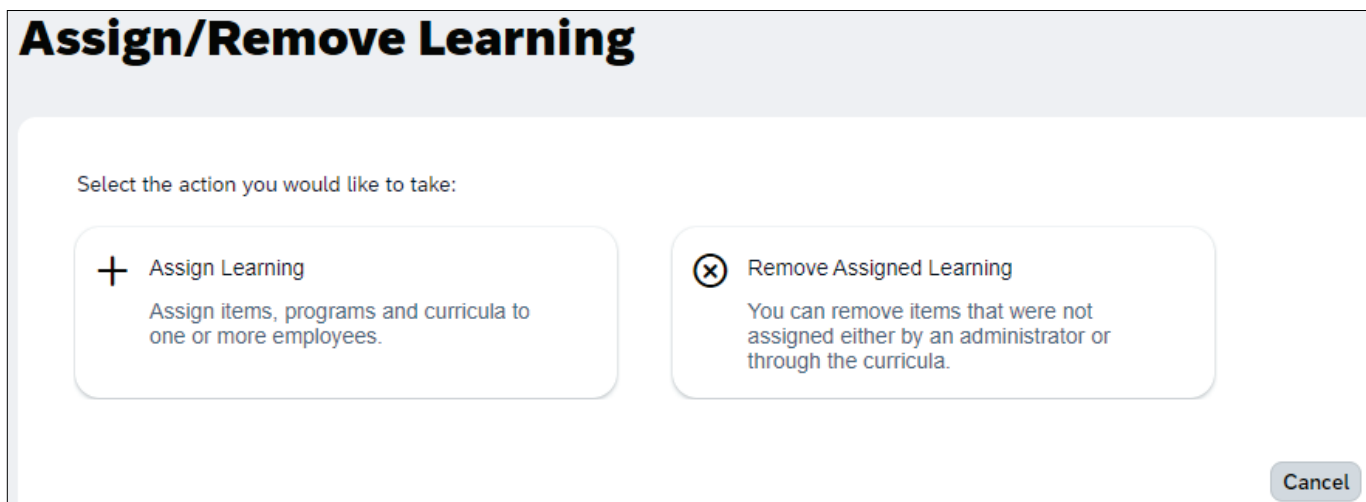
Assigning learning to team members

Procedure

1. [Log in to SuccessFactors and access the My Team page.](#)
 - In the *Manager Links* tile, click *Assign/Remove Learning*.

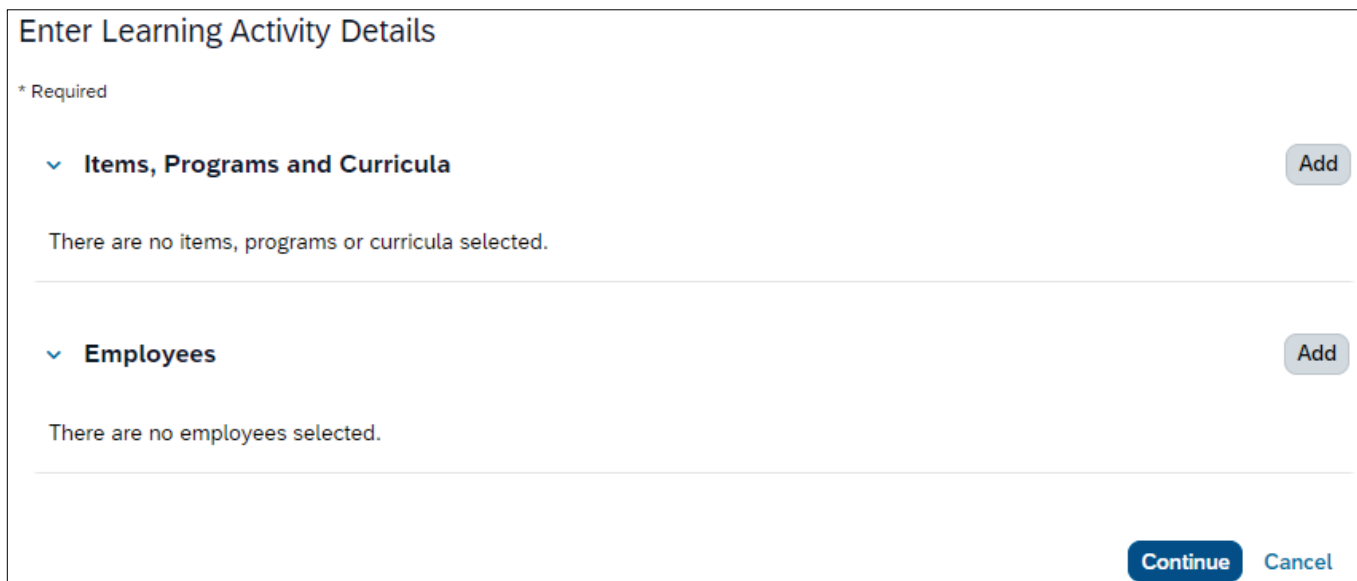



2. The *Assign/Remove Learning* page appears.



- Click *Assign Learning*.

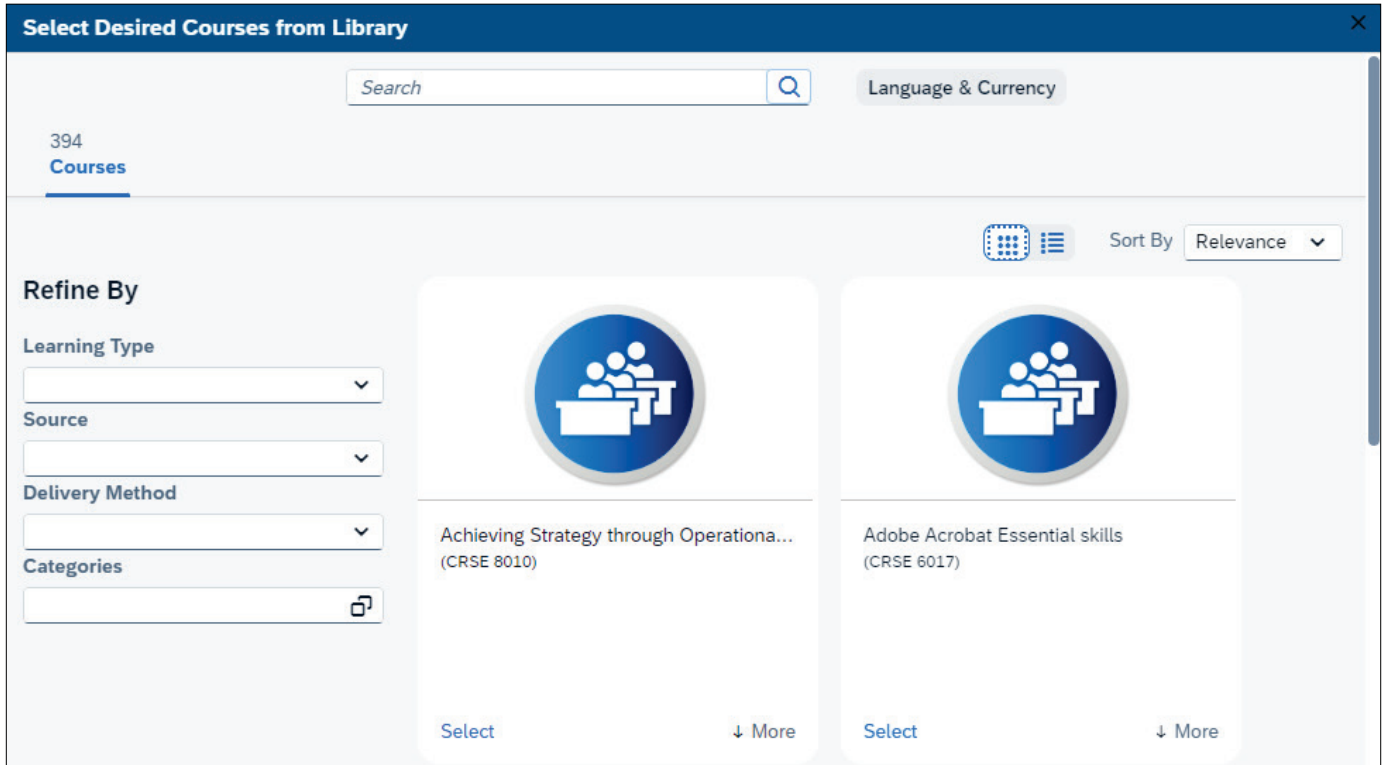
3. The *Enter Learning Activity Details* page appears.



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

Assigning learning to team members (continued)

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 reflect the course has been selected.
- Repeat the search steps above and select any other courses to assign.
- Click **X Close** in the top right of the *Select Desired Courses from Library* dialogue box.

Assigning learning to team members (continued)

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

Enter Learning Activity Details

* Required

▼ **Items, Programs and Curricula**
Add

Title	Type	Assignment Type	Priority	*Assigned	Required Date
Introduction to UCT for new staff		Required ▼	---	27/11/2023	d/M/yyyy
Development Dialogues		Required ▼	---	27/11/2023	d/M/yyyy

▼ **Employees**
Add

There are no employees selected.

Continue
Cancel

- 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 Employees

Employees	Region	Job Code	Manager	Organisation
<input type="checkbox"/>	<input type="text" value="Enter Employees"/>	<input type="text" value="Enter Region"/>	<input type="text" value="Enter Job Code"/>	<input type="text" value="Enter Organisation"/>
			<input checked="" type="checkbox"/> Indirect Employees	<input checked="" type="checkbox"/> Sub Organisation
<input type="checkbox"/>	F	41000965	A	
<input type="checkbox"/>	J	41000965	A	
<input type="checkbox"/>	S	41000965	A	

Cancel

- Select individual employees using the checkboxes or click 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.

Assigning learning to team members (continued)

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

Enter Learning Activity Details

* Required

▼ **Items, Programs and Curricula**
Add

Title	Type	Assignment Type	Priority	*Assigned	Required Date
Introduction to UCT for new staff		Required ▼	---	27/11/2023	31/12/2024
Development Dialogues		Required ▼	---	27/11/2023	31/12/2024

▼ **Employees**
Add

Name	Remove
R <input type="text"/>	×
L <input type="text"/>	×
A <input type="text"/>	×

Continue
Cancel

- Click Continue.

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.

Warning Details:

- The "Introduction to UCT for new staff" is already assigned to A .

Do you wish to proceed?

Yes
No





- 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.

Assigning learning to team members (continued)

9. The *Confirm Details* page appears.

Confirm Details

Items, Programs and Curricula

Title	Type	Assignment Type	Priority	Assign Date	Required Date
Introduction to UCT for new staff	 	REQ	---	27/11/2023	31/12/2024
Development Dialogues	 	REQ	---	27/11/2023	31/12/2024

Employees

Name

R

L

A

Assign Learning
Cancel

- Click Assign Learning.

10. The *Successfully Assigned* page appears.

Successfully Assigned

The items/programs/curricula have been successfully added to the specified employees. If the curricula/program were already assigned, they will not be re-assigned

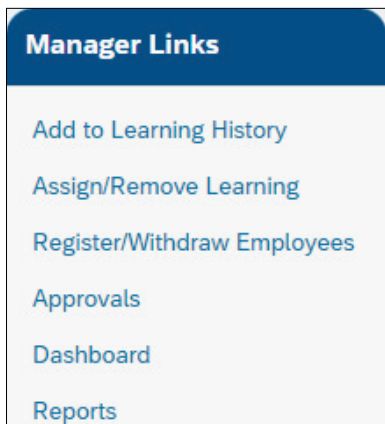
Close

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

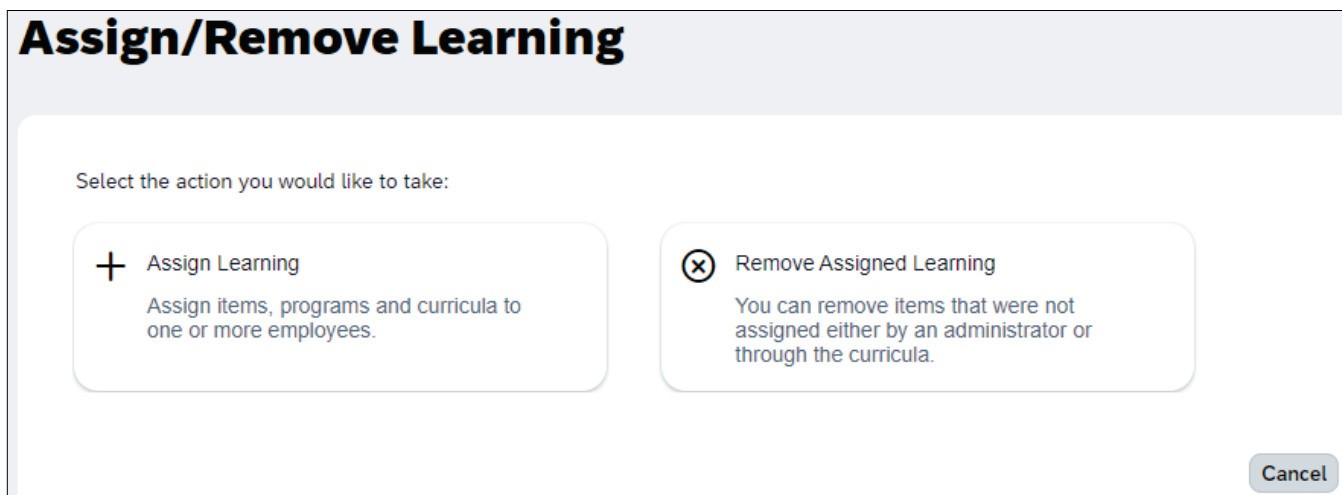
Removing assigned learning from team members

Procedure

1. [Log in to SuccessFactors and access the My Team page.](#)
 - In the *Manager Links* tile, click *Assign/Remove Learning*.

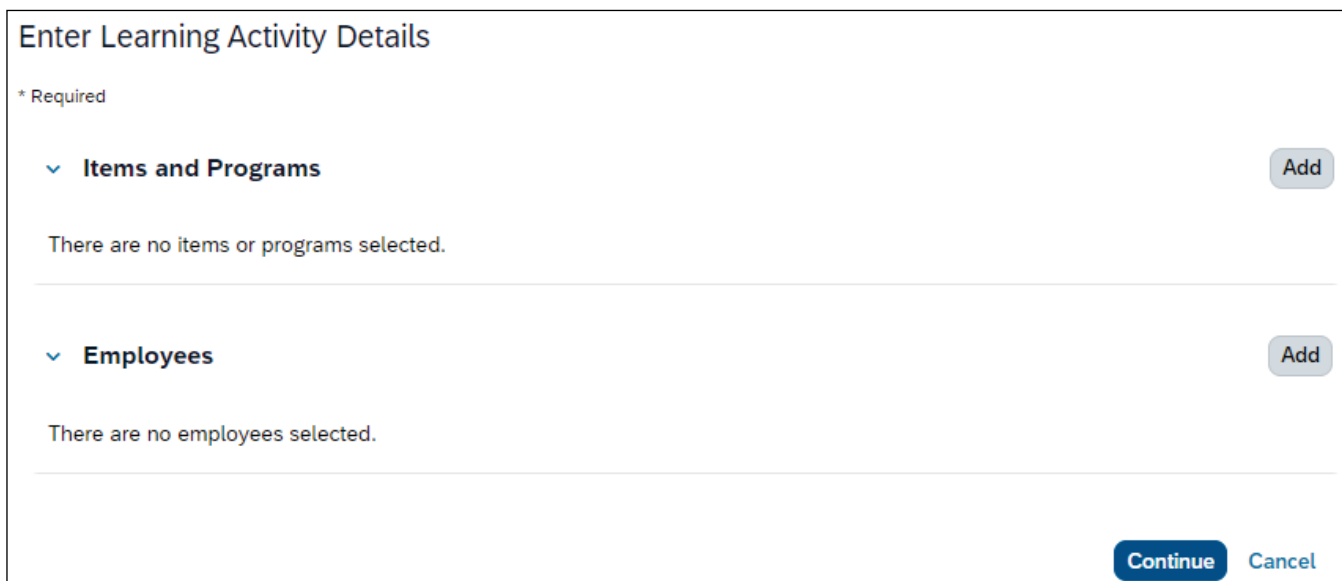


2. The *Assign/Remove Learning* page appears.



- Click *Remove Assigned Learning*.

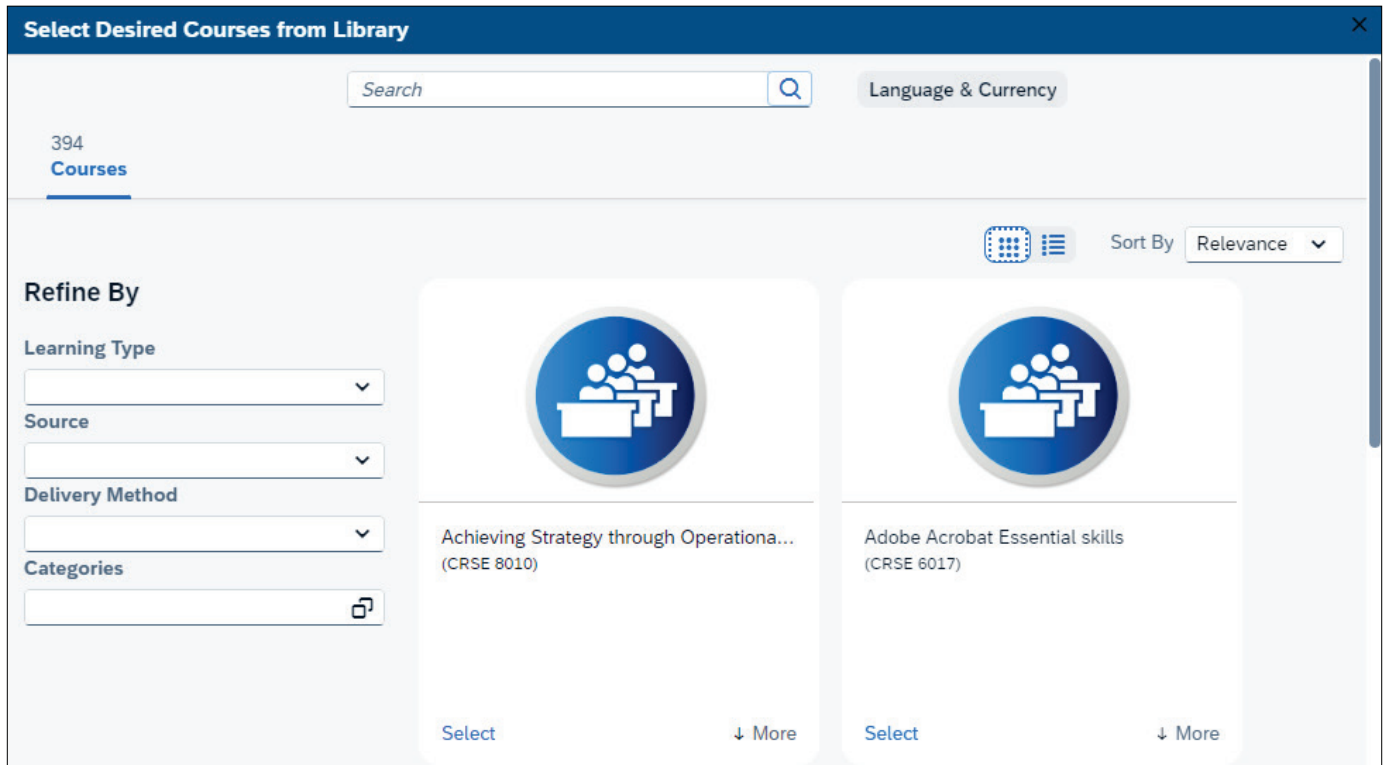
3. The *Enter Learning Activity Details* page appears.



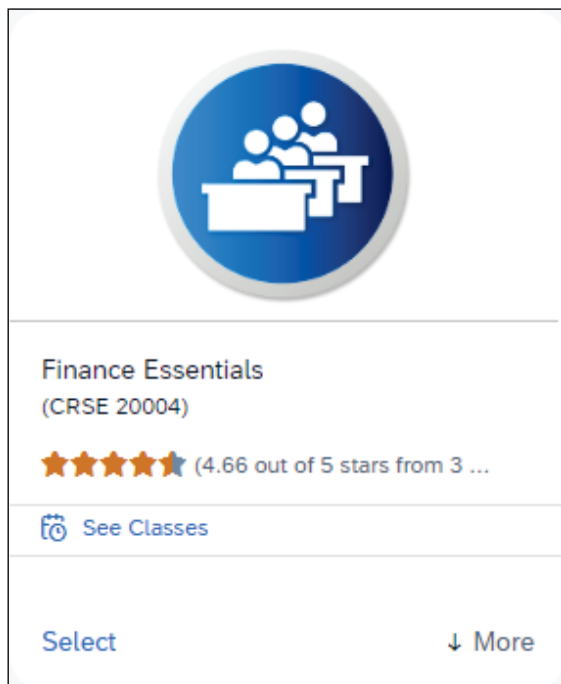
- To choose courses (learning items) or programs to remove from team members, click **Add** on the right (in line with the *Items, Programs and Curricula* heading).

Removing assigned learning from team members (continued)

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



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



- Click **Select**.
- The text at the bottom of the course tile changes to reflect the course has been selected.
- Repeat the search steps above and select any other courses to remove from one or more team members.

Click  *Close* in the top right of the *Select Desired Courses from Library* dialogue box.

Removing assigned learning from team members (continued)

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

Enter Learning Activity Details

* Required

▼ **Items and Programs**

Title	Type	Priority	
Finance Essentials		---	

Add

▼ **Employees**

There are no employees selected.

Add

Continue Cancel

- To choose one or more employees, click **Add** on the right (in line with the *Employees* heading).

- The *Select Employees* dialogue box appears.

Select Employees

	Employees	Region	Job Code	Manager	Organisation
<input type="checkbox"/>	<input type="text" value="Enter Employees"/>	<input type="text" value="Enter Region"/>	<input type="text" value="Enter Job Code"/>	<input type="text" value="Enter Manager"/>	<input type="text" value="Enter Organisation"/>
				<input checked="" type="checkbox"/> Indirect Employees	<input checked="" type="checkbox"/> Sub Organisation
<input type="checkbox"/>	F <input type="text"/>		41000965	A <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	J <input type="text"/>		41000965	A <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	S <input type="text"/>		41000965	A <input type="text"/>	<input type="text"/>

Cancel

- Select individual employees using the checkboxes or click 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.

Removing assigned learning from team members (continued)

7. The *Enter Learning Activity Details* page reappears, displaying the selected employees in the *Employees* section.

Enter Learning Activity Details

* Required

Items and Programs

Add

Title	Type	Priority
Finance Essentials		---

Employees

Add

Name	Remove
R <input type="text"/>	X
L <input type="text"/>	X
A <input type="text"/>	X

Continue
Cancel

- Click Continue.

8. The *Confirm Details* page appears.

Confirm Details

Items and Programs

Title	Type
Finance Essentials	

Employees

Name
R <input type="text"/>
L <input type="text"/>
A <input type="text"/>

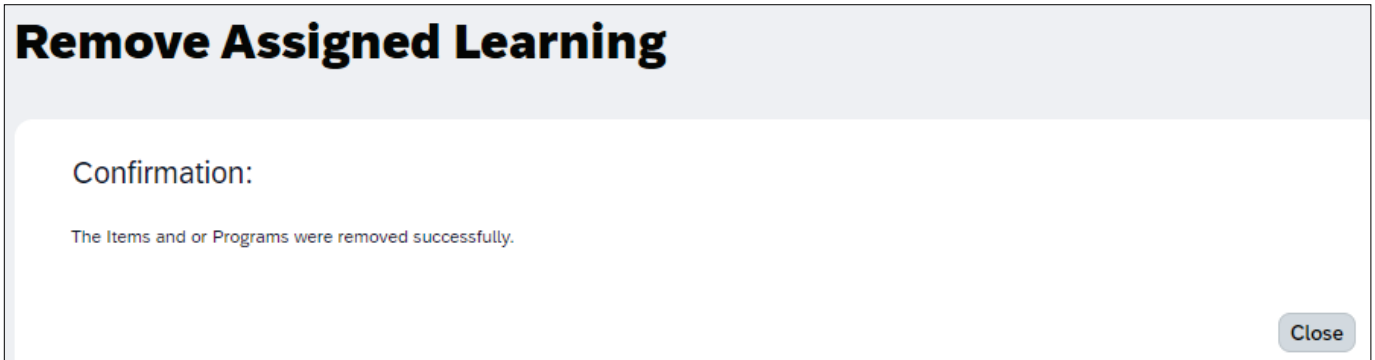
Remove Learning
Cancel

- Click Remove Learning.

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

Removing assigned learning from team members (continued)

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

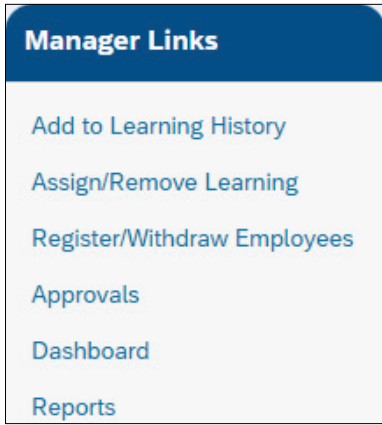


- Click **Close** to return to the *My Team* page.

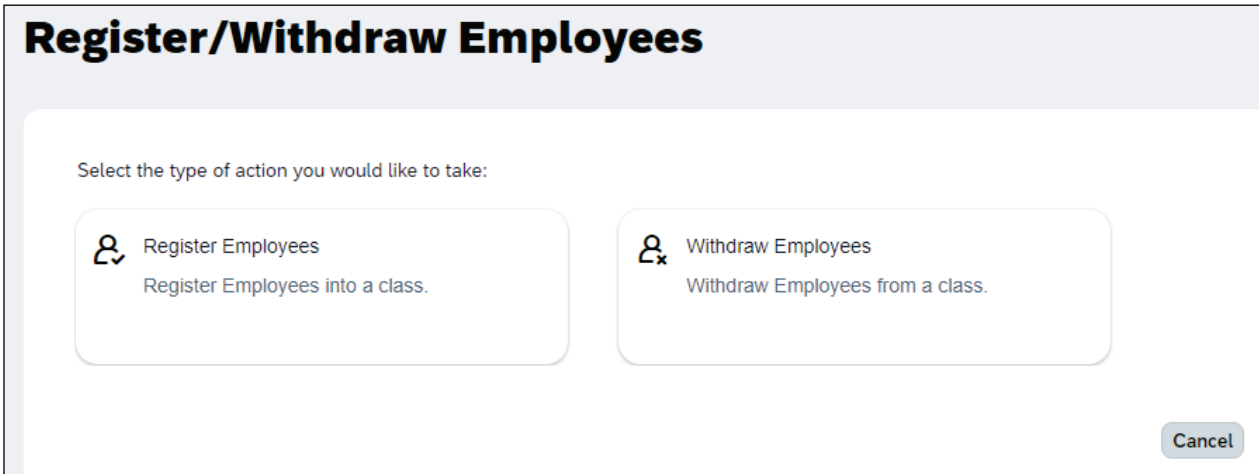
Registering team members for a class

Procedure

1. [Log in to SuccessFactors and access the My Team page.](#)
 - In the *Manager Links* tile, click *Register/Withdraw Employees*.

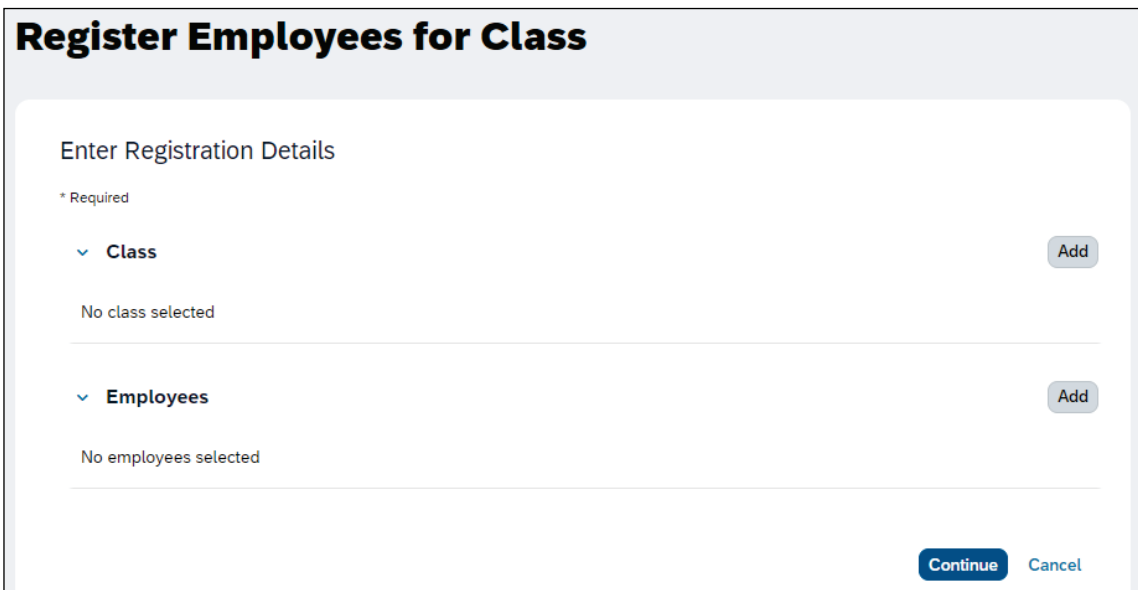


2. The *Register/Withdraw Employees* page appears.



- Click *Register Employees*.

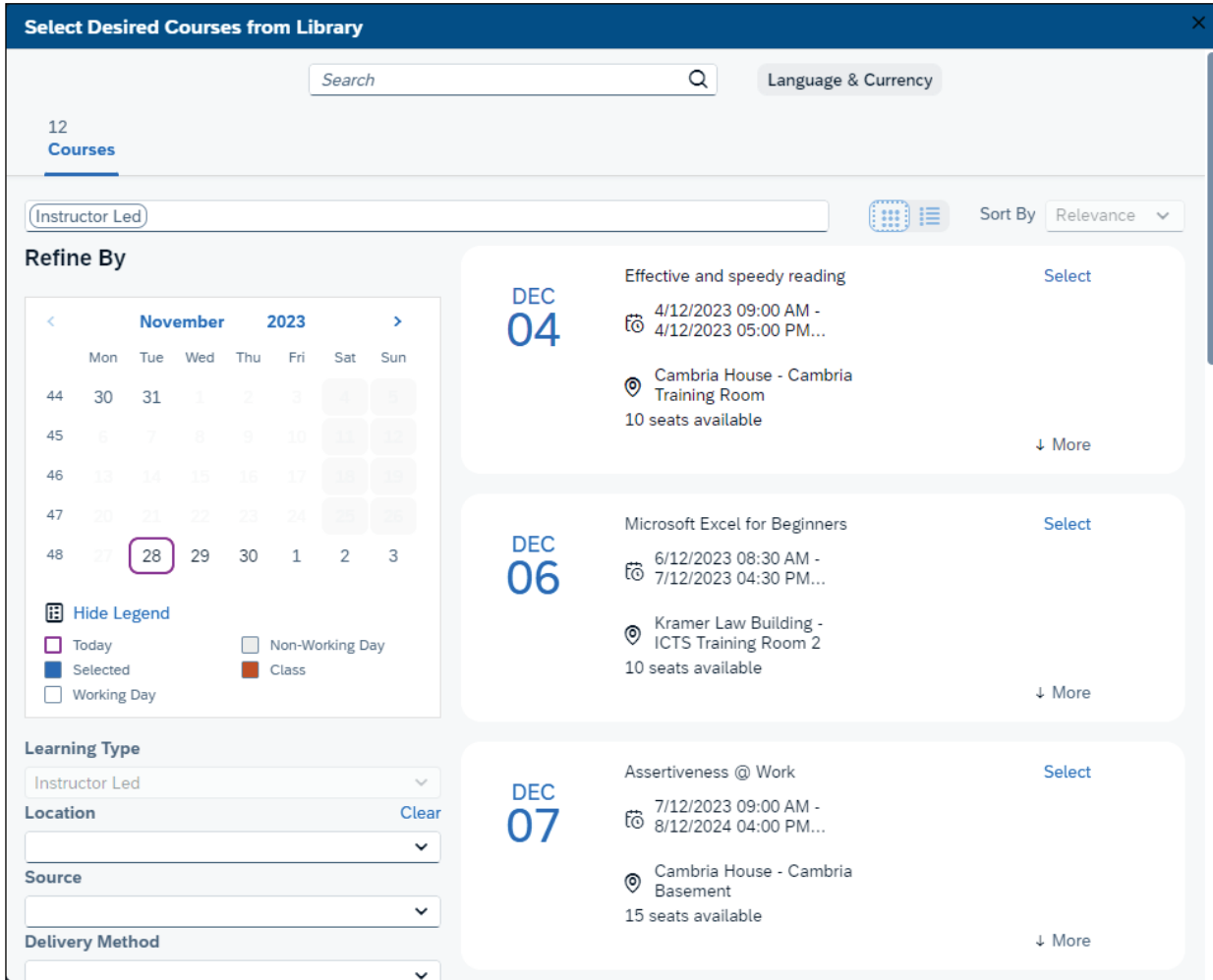
3. The *Register Employees for Class* page appears.



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

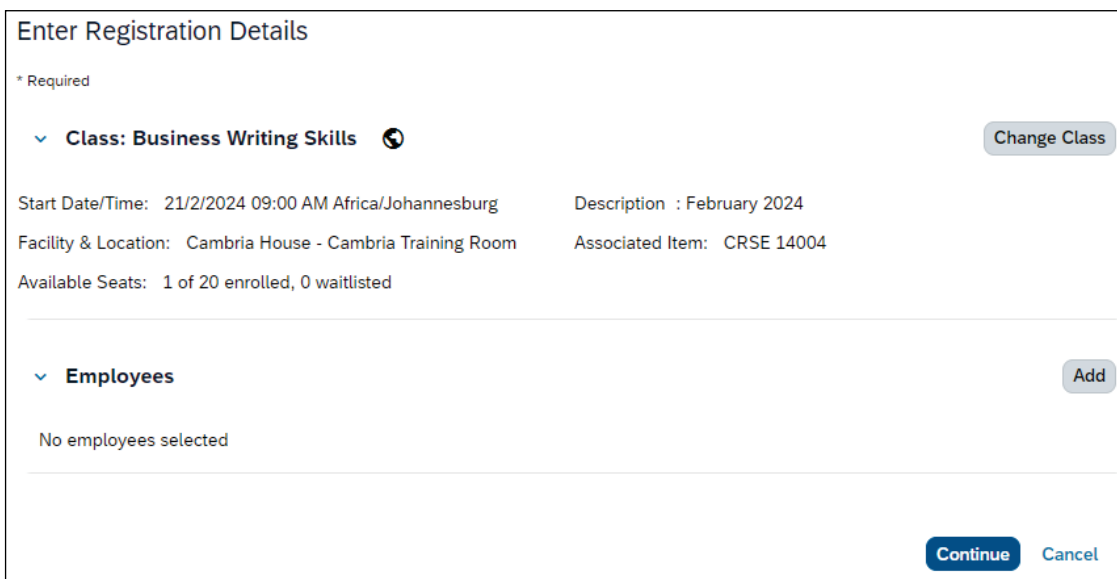
Registering team members for a class (continued)

4. The *Select Desired Courses from Library* dialogue box appears, displaying all available scheduled 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 *Enter Registration Details* section reappears, displaying the details of the selected class.



- To register one or more employees, click **Add** on the right (in line with *Employees*).

Registering team members for a class (continued)

6. The *Select Employees* dialogue box appears.

Select Employees					
	Employees	Region	Job Code	Manager	Organisation
<input type="checkbox"/>	<input type="text" value="Enter Employees"/>	<input type="text" value="Enter Region"/>	<input type="text" value="Enter Job Code"/>	<input type="text" value="Enter Manager"/> <input checked="" type="checkbox"/> Indirect Employees	<input type="text" value="Enter Organisation"/> <input checked="" type="checkbox"/> Sub Organisation
<input type="checkbox"/>	F <input type="text"/>		41000965	A <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	J <input type="text"/>		41000965	A <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	S <input type="text"/>		41000965	A <input type="text"/>	<input type="text"/>

- Select individual employees using the checkboxes or click 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 in grey with a tick indicator .
- 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.

Validation Error

Please correct the following errors before proceeding:

- A conflict was detected against User A for class Introduction to Managing Budgets (Start: 21/2/2024, End: 21/2/2024).

- Either choose a different class by clicking and selecting the appropriate class.
- Or remove the affected employee using the *Remove* button in the *Remove* column.

Registering team members for a class (continued)

8. The *Enter Registration Details* section reappears, displaying the selected employees.

Enter Registration Details

* Required

▼ **Class: Business Writing Skills** Change Class

Start Date/Time: 21/2/2024 09:00 AM Africa/Johannesburg Description : February 2024
 Facility & Location: Cambria House - Cambria Training Room Associated Item: CRSE 14004
 Available Seats: 0 of 20 enrolled, 0 waitlisted

▼ **Employees** Add

Name	* Registration Status	Payment Method	Account	Comments	Remove
L <input type="text"/>	Active Enrolment (Enrolled) ▼			+	×
R <input type="text"/>	Active Enrolment (Enrolled) ▼			+	×
A <input type="text"/>	Active Enrolment (Enrolled) ▼			+	×

Continue Cancel

- To proceed with registering the selected employees, click Continue.

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.

Warning Details:

- A is already registered in to a different class "53012" with the "Active Enrolment" status for the "Business Writing Skills".

Do you wish to proceed?


Yes No

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

Registering team members for a class (continued)

10. The *Confirm Registration Details* section appears.

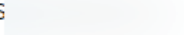
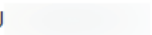
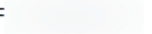
Confirm Registration Details

Class: Business Writing Skills 

Start Date/Time: 21/2/2024 09:00 AM Africa/Johannesburg Description : February 2024

Facility & Location: Cambria House - Cambria Training Room Associated Item: CRSE 14004

Employees

Name	Registration Status	Payment Method	Comments
S 	Active Enrolment(Enrolled)		
J 	Active Enrolment(Enrolled)		
F 	Active Enrolment(Enrolled)		

Notify:

Users Instructors Managers Others

Register Employees
Cancel

- If the registration requires additional information (e.g. fund number, dietary 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.

* Fund Number:

* Cost Centre:

* Email address of Fund Holder:

Dietary Requirements:

Food Allergies:


Disability Accommodations Requirements:

- Click Register Employees.

Registering team members for a class (continued)

11. The *Successfully Registered* page appears.

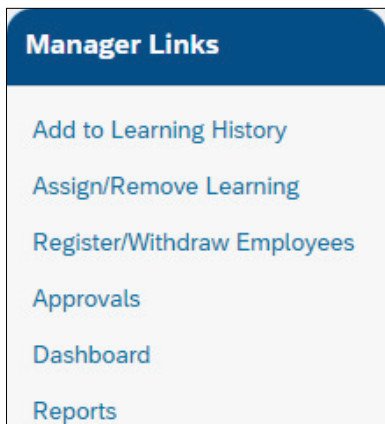


Click  to return to the *My Team* page.

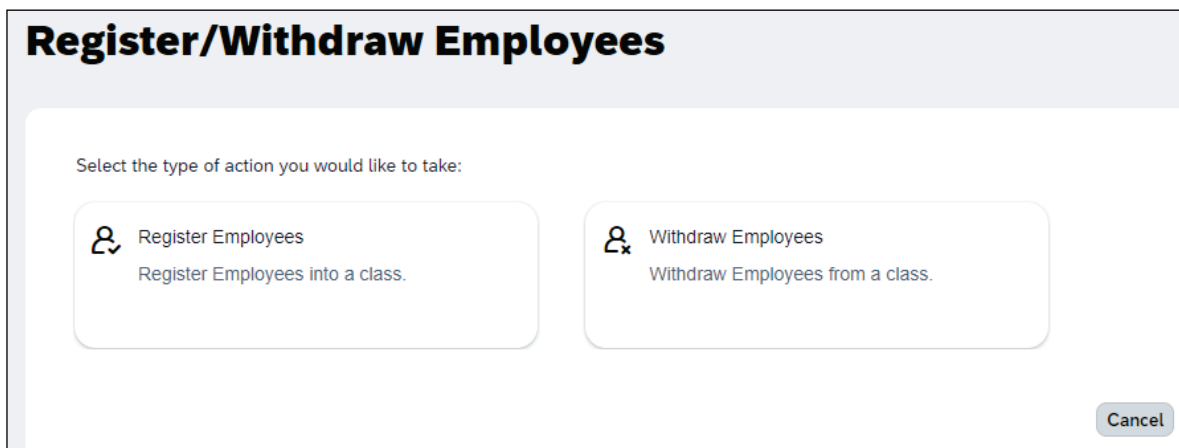
Withdrawing team members from a class

Procedure

1. [Log in to SuccessFactors and access the My Team page.](#)
 - In the *Manager Links* tile, click *Register/Withdraw Employees*.

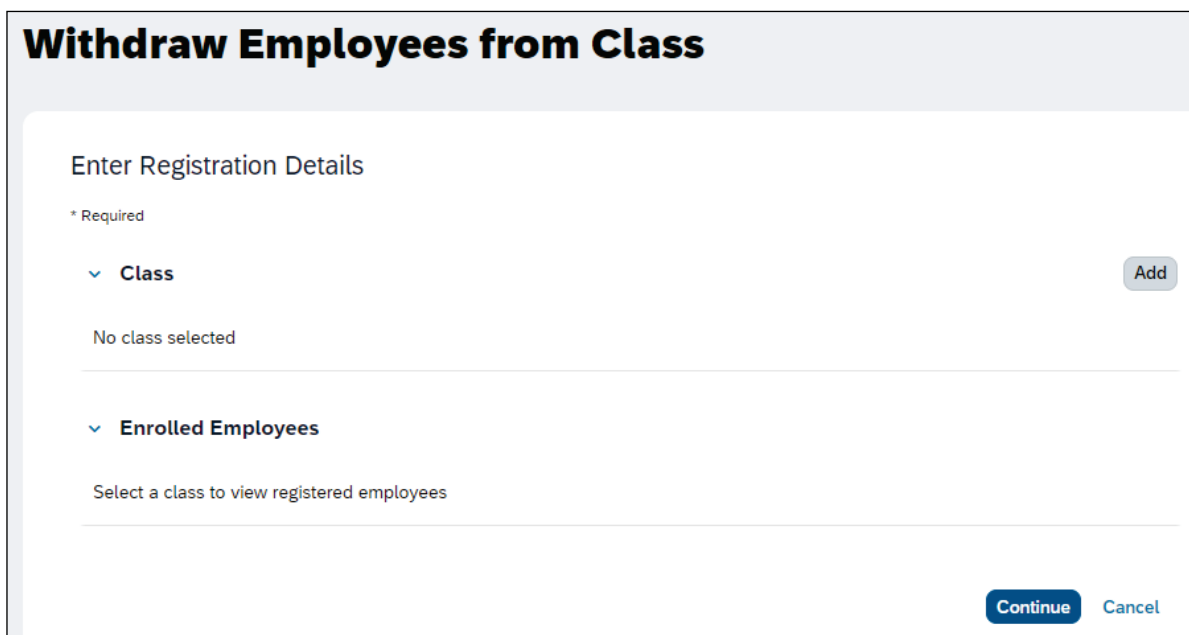


2. The *Register/Withdraw Employees* page appears.



- 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 team members from a class (continued)

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

Select Desired Courses from Library

Search Language & Currency

12 Courses

Instructor Led Sort By Relevance

Refine By

November 2023

Mon	Tue	Wed	Thu	Fri	Sat	Sun
44	30	31	1	2	3	4
45	6	7	8	9	10	11
46	13	14	15	16	17	18
47	20	21	22	23	24	25
48	27	28	29	30	1	2

Hide Legend

- Today
- Selected
- Working Day
- Non-Working Day
- Class

Learning Type
Instructor Led

Location
 Clear

Source

Delivery Method

DEC 04 Effective and speedy reading [Select](#)
 4/12/2023 09:00 AM - 4/12/2023 05:00 PM...
 Cambria House - Cambria Training Room
 10 seats available [More](#)

DEC 06 Microsoft Excel for Beginners [Select](#)
 6/12/2023 08:30 AM - 7/12/2023 04:30 PM...
 Kramer Law Building - ICTS Training Room 2
 10 seats available [More](#)

DEC 07 Assertiveness @ Work [Select](#)
 7/12/2023 09:00 AM - 8/12/2024 04:00 PM...
 Cambria House - Cambria Basement
 15 seats available [More](#)

- 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 team members from a class (continued)

5. The *Enter Registration Details* section reappears, displaying the details of the selected class. The *Enrolled Employees* section automatically lists any of your employees currently registered on the scheduled class.

Enter Registration Details

* Required

▼ **Class: Business Writing Skills** Change Class

Start Date/Time: 21/2/2024 09:00 AM Africa/Johannesburg Description : February 2024
 Facility & Location: Cambria House - Cambria Training Room Associated Item: CRSE 14004

▼ **Enrolled Employees**

Name	Registration Status	* Withdrawal Reason	<input type="checkbox"/> Select All	Withdraw
L <input style="width: 50px;" type="text"/>	Active Enrolment(Enrolled)	<input style="width: 100px;" type="text"/> ▼	<input type="checkbox"/>	
R <input style="width: 50px;" type="text"/>	Active Enrolment(Enrolled)	<input style="width: 100px;" type="text"/> ▼	<input type="checkbox"/>	
A <input style="width: 50px;" type="text"/>	Active Enrolment(Enrolled)	<input style="width: 100px;" type="text"/> ▼	<input type="checkbox"/>	

Continue
Cancel

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

Withdrawing team members from a class (continued)

6. The *Confirm Withdrawal Details* section appears.

Confirm Withdrawal Details

Class: Business Writing Skills

Start Date/Time: 21/2/2024 09:00 AM Africa/Johannesburg Description: February 2024

Primary Location: Cambria House - Cambria Training Room Associated Item: CRSE 14004

Employees to be Withdrawn

User	Organisation	Item	Title	Class ID	User can Self-Register
S		CRSE 14004 (Rev 15/7/2020 10:53 AM Africa/Johannesburg)	Business Writing Skills	53006	No
J		CRSE 14004 (Rev 15/7/2020 10:53 AM Africa/Johannesburg)	Business Writing Skills	53006	No
F		CRSE 14004 (Rev 15/7/2020 10:53 AM Africa/Johannesburg)	Business Writing Skills	53006	No

Notify:

Users Instructors Managers Others

Remove associated item from the Learning Plan

Withdraw Employees
Cancel

- 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.

Successfully Withdrawn

All withdrawals in this class were successful.

[Register or withdraw more employees](#)

Close

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

Changing a team member's learning plan

Procedure

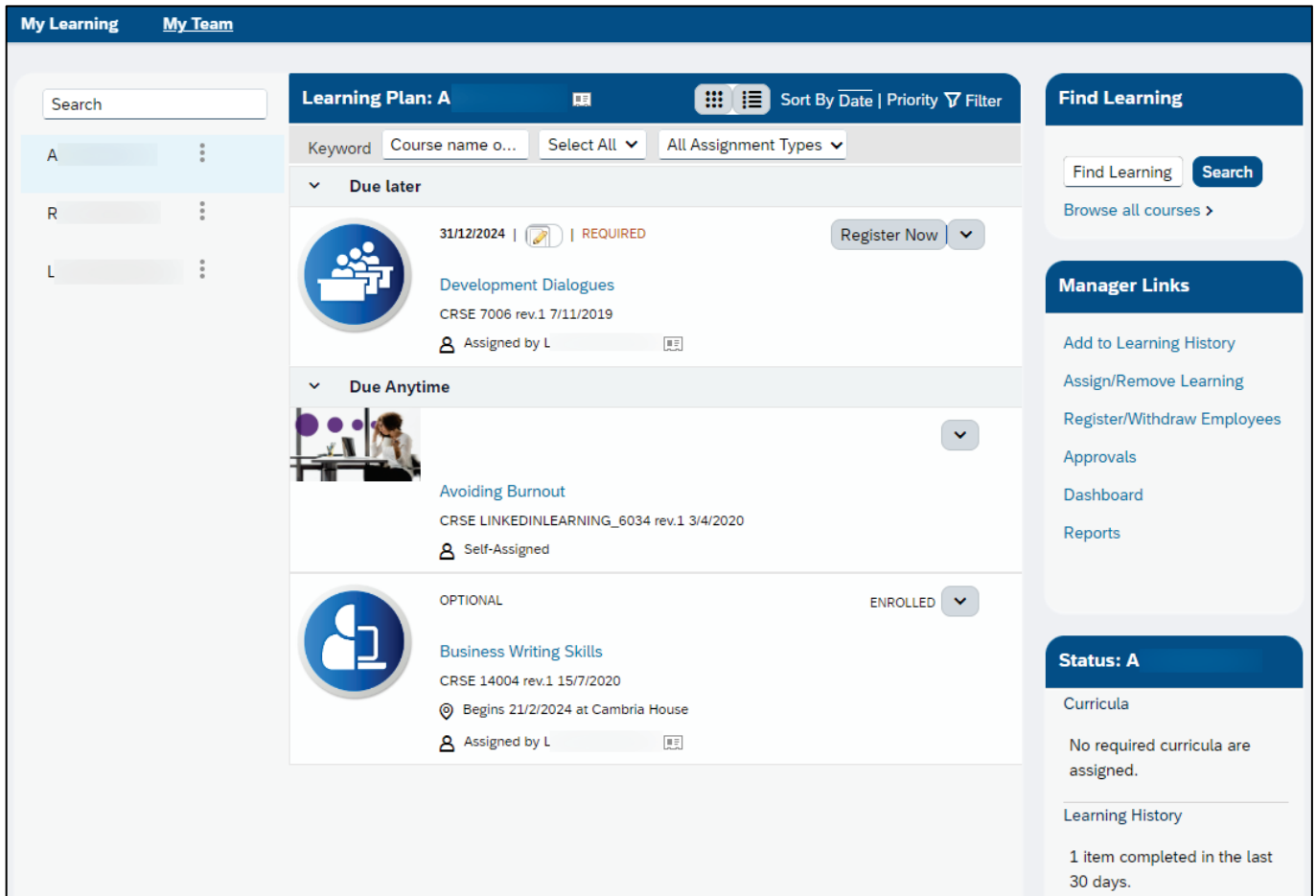
1. [Log in to SuccessFactors and access the My Team page.](#)


The screenshot displays the 'My Learning' and 'My Team' tabs at the top. The main area is titled 'Learning Plan: A' and includes a search bar, filters for 'Keyword', 'Course name o...', 'Select All', and 'All Assignment Types'. It is sorted by 'Date | Priority'. The course list is categorized into 'Due later' and 'Due Anytime'. The 'Due later' category shows 'Development Dialogues' (CRSE 7006 rev.1 7/11/2019) with a 'Register Now' button and 'Business Writing Skills' (CRSE 14004 rev.1 15/7/2020) which is 'ENROLLED'. The 'Due Anytime' category shows 'Avoiding Burnout' (CRSE LINKEDINLEARNING_6034 rev.1 3/4/2020) which is 'Self-Assigned'. The right sidebar contains 'Find Learning' (with 'Find Learning' and 'Search' buttons and a 'Browse all courses >' link), 'Manager Links' (with links for 'Add to Learning History', 'Assign/Remove Learning', 'Register/Withdraw Employees', 'Approvals', 'Dashboard', and 'Reports'), and 'Status: A' (with 'Curricula' showing 'No required curricula are assigned.' and 'Learning History' showing '1 item completed in the last 30 days.').

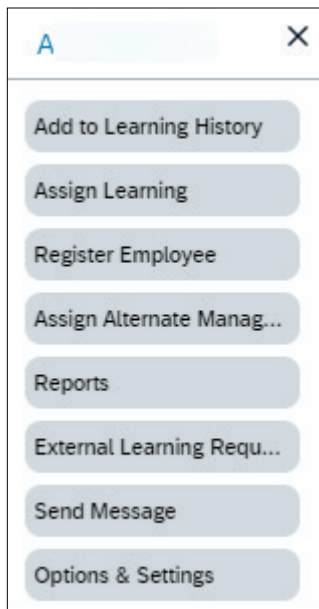
- In the employee's *Learning Plan*, use available dropdown selections to make changes to assigned learning and class registrations.

This block provides a detailed view of the course cards. The top card is for 'Development Dialogues' (REQUIRED, due 31/12/2024). The 'Register Now' dropdown menu is open, showing options: 'Request a Class', 'Remove', and 'Recommend'. The bottom card is for 'Business Writing Skills' (OPTIONAL, ENROLLED). The 'ENROLLED' dropdown menu is open, showing options: 'Withdraw', 'View Registration', 'Request a Class', and 'Recommend'. Both cards show the course icon, title, ID, revision, and date, along with an 'Assigned by' field.

Changing a team member's learning plan (continued)



- **To change individual employee learning plans**, click  alongside the team member's name and choose the appropriate menu option e.g. *Assign Learning, Register Employee*.



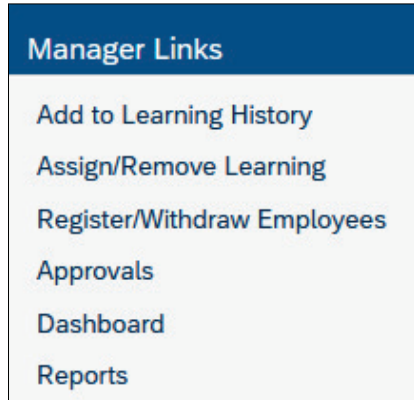
Recording external learning for team members

Before you begin

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

Procedure


1. [Log in to SuccessFactors and access the *My Team* page.](#)
 - In the *Manager Links* tile, click *Add to Learning History*.



2. The *Add to Learning History* dialogue box appears.

Add to Learning History

Select the type of item you would like to add to history:



External Event
Add to learning history for items that are not entered into the system.

Cancel

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

Recording external learning for team members (continued)

3. The *Add to Learning History* dialogue box reappears, providing space to enter the event details.

Add to Learning History

Enter Event Details

Required*

⊖ External Event

Description*

Completion Date:(d/M/yyyy)*

Completion Time:(hh:mm AM/PM)*

Time Zone:*

Instructor ID:

Name of Training Provider / Learning Institution:

Total Hours:
(1000)

Contact Hours:
(1000)

Credit Hours:
(1000)

CPD:
(1000)

⊖ Employees ⊕

There are no Users selected.

Back
Continue
Cancel

- Enter the event *Description*, *Completion Date*, *Completion Time* and any other useful fields such as *Total Hours*, *Name of Training Provider / Learning Institution*.
- Click *Employees Add* to add the employees that attended the external event.

4. The *Select Employees* dialogue box appears.

Select Employees

	Employees	Region	Job Code	Manager	Organisation
<input type="checkbox"/>	<input style="width: 100%;" type="text" value="Enter Employees"/>	<input style="width: 100%;" type="text" value="Enter Region"/>	<input style="width: 100%;" type="text" value="Enter Job Code"/>	<input style="width: 100%;" type="text" value="Enter Manager"/>	<input style="width: 100%;" type="text" value="Enter Organisation"/>
				<input checked="" type="checkbox"/> Indirect Employees	<input checked="" type="checkbox"/> Sub Organisation
<input type="checkbox"/>	F <input style="width: 50px;" type="text"/>		41000965	A <input style="width: 50px;" type="text"/>	
<input type="checkbox"/>	J <input style="width: 50px;" type="text"/>		41000965	A <input style="width: 50px;" type="text"/>	
<input type="checkbox"/>	S <input style="width: 50px;" type="text"/>		41000965	A <input style="width: 50px;" type="text"/>	

Add
Cancel

- Select individual employees using the checkboxes or click 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 becomes active when at least one employee is selected.

Recording external learning for team members (continued)

- The *Add to Learning History* dialogue box reappears, displaying the selected employees in the *Employees* section.

Add to Learning History

Enter Event Details

Required*

⊖ External Event

Description*

Completion Date:(d/M/yyyy)*

Completion Time:(hh:mm AM/PM)*

Time Zone:*

Instructor ID:

Name of Training Provider / Learning Institution:

Total Hours:
(1000)

Contact Hours:
(1000)

Credit Hours:
(1000)

CPD:
(1000)

⊖ Employees ⊕ Assign Defaults

Name	Grade	Comments	Remove
L <input style="width: 50px;" type="text"/>	<input style="width: 100px;" type="text"/>	<input style="width: 50px;" type="text"/>	
R <input style="width: 50px;" type="text"/>	<input style="width: 100px;" type="text"/>	<input style="width: 50px;" type="text"/>	
A <input style="width: 50px;" type="text"/>	<input style="width: 100px;" type="text"/>	<input style="width: 50px;" type="text"/>	

Back
Continue Cancel

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

Recording external learning for team members (continued)

6. The *Add to Learning History* dialogue box reappears, to confirm the learning details.

Add to Learning History

Confirm Learning Details

Item: Rev

Description: Customer Service Essentials

Completion Date: 27/11/2023

Total Hours: 8.00

Completion Time: 05:00 PM Africa/Johannesburg

Contact Hours:

Instructor: CS Skills

Credit Hours:

CPD:

Employees

Name	Grade	Comments	Costs	Amount
L [redacted]	80%			
R [redacted]	85%			
A [redacted]	80%			

Back
Add to Learning History
Cancel

- Click Add to Learning History.

7. The *Add to Learning History* dialogue box reappears, indicating the learning was recorded successfully.

Add to Learning History

Recording Status

Learning Recorded Successfully

Item: Customer Service Essentials Rev:

- S [redacted]
- J [redacted]
- F [redacted]

- [File Attachments \(0\)](#)
- [File Attachments \(0\)](#)
- [File Attachments \(0\)](#)

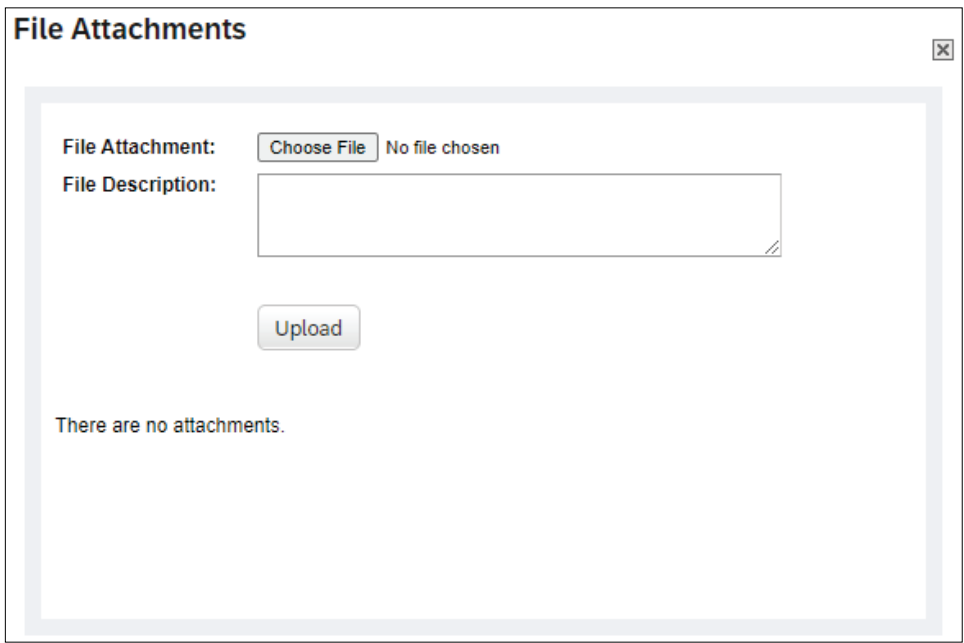
Close

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

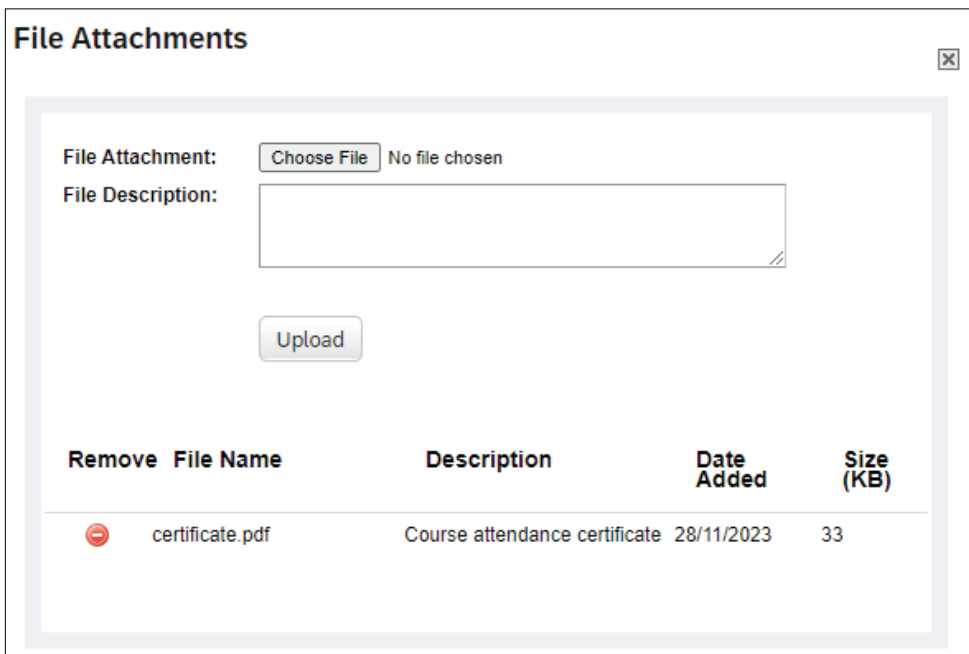
If there are no documents to attach, skip to step 8.

Recording external learning for team members (continued)

- 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* dialogue box reappears, displaying the number of file attachments (if applicable).
- Click **Close** to return to the *My Team* page. The recorded external learning will appear in the employee's *Learning History* tile.