

SuccessFactors Learning guide for managers

Issued by UCT Human Resources May 2025

Contents: SuccessFactors Learning guide for managers

Logging in to SuccessFactors via a browser	3
Viewing team learning plans and learning history	6
Processing approval requests from the Home page	7
Processing approval requests from the Learning page	9
Registering a single team member for a class	11
Assigning learning to multiple team members	15
Removing assigned learning from multiple team members	20
Registering multiple team members for a class	25
Withdrawing multiple team members from a class	30
Recording external learning for team members	34

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 <u>IT</u> <u>Service Desk</u>.

Procedure

- 1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
- 2. Log in to SuccessFactors via <u>www.successfactors.uct.ac.za</u>.
- 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 <u>step 4</u>).

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



Select the appropriate account.

← 01 @wf.uct.ac.za	
Enter password	
Password	
Forgot my password	
	Sign in

- 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 <u>step 4</u>).

Logging in to SuccessFactors via a browser (continued)

New users

Sign in	
someone@example.com	
Can't access your account?	
	Next

- 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.

← 01 @wf.uct.ac.za	
Enter password	
Password	
Forgot my password	
	Sign in

- 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.

	Search for actions or people	<u> </u>
earning		③ Team View ⋮≡ ∨
Search for Learning	Q Browse all courses	
Explore, Learn and Unleash Y Full Potential Achieve your goals and master new skills. Anytime, and	our ywhere.	
Required Learning		

Click Team View

6. The Team View page appears.



See:

Viewing team learning plans and learning history Registering a single team member for a class Processing approval request from the *Home* page or from the *Learning* page Assigning learning to multiple team members Removing assigned learning from multiple team members Registering multiple team members for a class Withdrawing multiple team members from a class 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: <u>Processing approval requests from the *Learning* page</u>.

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 **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 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.

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.

Requests for	or Me		
Internal Clas	55	Internal Class	
8 v		8 v	
Course Title	Development Dialogue Training	Course Title	Memory Skills
Туре	Withdraw	Туре	Registration
	××		× ×

- 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 Approve.

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

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 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.

Registering a single team member for a class

Procedure

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

Learning Home Page / Team View		J 's Learning	
Team View Search people	••• Q	J J E Student Support Administrator (20061250)	
J J Student Support Administrator (20061250)	>	Required Learning (1) Important Learning (3) Invest in Myself (0) Required Learning (1)	۷ ~
A A Administrative Officer (20032358)	>	Memory Skills Due on 31/12/2025 Instructor-Led ● 16h 0m	Register

- Click Register alongside the appropriate course.
- 2. The Available Classes page appears. Scheduling conflicts for any of the classes will be indicated.

My Learning / Team View / J	's Learning: Memory Skills / Available Classes	
Memory Skill	S	
20004		
Available Classes (2)		
Monday 7/7/2025 – 08:30 AM	Tuesday 8/7/2025 04:30 PM Africa/Johannesburg	
🏥 Cambria House		Scheduling Conflict
		19 seats available
Wednesday 20/8/2025	– Thursday 21/8/2025	
08:30 AM	04:30 PM Africa/Johannesburg	
🐻 Virtual Class		
		19 seats available

- 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.

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



Register

Click

4. The *Registration* page appears, displaying the selected class details.

My Learning / Team View / J 's Learning: Memory Skills /	's Learning: Memory Skills / Available Classes / Class Details / Registration		
Registration			
Special Requests Disability Accommodations Requirements	Memory Skills Class ID: 77010		
	Image: Wednesday 20/8/2025 O8:30 AM Thursday 21/8/2025 O4:30 PM		
	Review Cancel		

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



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

My Learning / Team View / J	's Learning: Memory Skills / Available Classes / Class Details / Registration		
Almost Done!	Review Your Information		
Special Requests Disability Accommodations Requiren N/A	nents Class ID: 77010		
	Image: Wednesday 20/8/2025 08:30 AM Thursday 21/8/2025 04:30 PM		
	Complete Ec		

- 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.



7. The *Class Details* page reappears.

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

My Learning / Team View / J	's Learning: Memory Skills / Available Classe	s / Class Details
Memory Skills 77010 Wednesday 20/8/2025 - 08:30 AM Thursday 21/8/2025	Terr Virtual Class	
04:30 PM Agenda Additional Information		
All times are shown in your time zon	e (Africa/Johannesburg)	Instructors
Day 1 : Wednesday 20/8/2029 08:30 AM - 04:30 PM	5	A Primary: Ms Instructor
Day 2 : Thursday 21/8/2025		
08:30 AM - 04:30 PM		

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

J	's Learning		
J J Student Supp	E ort Administrator (20061250)		
Required Learning (1)	Important Learning (3)	Invest in Myself (0)	
Required Learning	g (1)		v ~
Memory Skills			
20/8/2025 • 08:30 am			•••
८, Registered by Mar	ager		

Assigning learning to multiple team members

Procedure

_

-

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

Learning Home Page / Team View		L 's Learning	
Team View Search people	••• Q	8 L E Programme Officer (20050606)	
L Programme Officer (20050606)	>	Required Learning (3) Important Learning (1) Invest in Myself (2) Required Learning (3)	۷ -
A A Administrative Officer (20032358)	>	Introduction to UCT for new staff Due on 31/8/2025 Instructor-Led with Online Content • 7h 0m	Register

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

Remove Assigned Learning
You can remove items that were not assigned either by an administrator or through the curricula.

Click Assign Learning.

3. The Enter Learning Activity Details page appears.

Enter Learning Activity Details	
Required	
 Items, Programmes and Curricula 	Add
There are no items, programmes or curricula selected.	
 Employees 	Add
There are no employees selected.	
	Continue Cancel
To choose courses (learning items) or programmes to assign	to team members, click Add on

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

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

Select Desired Course	s from Library					
394 Courses	Searc	h		Q	Language & Currency	
Refine By Learning Type Source Delivery Method Categories	 ✓ ✓ ✓ ✓ ✓ ✓ 	Achieving Strategy tr (CRSE 8010)	through Operation	ona	Adobe Acrobat Essential st (CRSE 6017)	Sort By Relevance
		Select	t	More	Select	↓ More

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

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

Enter Learning Activity Detai	ils					
* Required						
 Items, Programmes and Cu 	rricula					Add
Title	Туре	Assignment Type	Priority	*Assigned	Required Date	
Staff	<u>۵</u> @	Optional 🗸		16/5/2025 📛	d/M/yyyy	×
S Development Dialogue Training	8 @	Required 🗸		16/5/2025 📛	d/M/yyyy 📛	×
 Employees 						Add
There are no employees selected.						
					Continue C	ancel

- 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.

oyees Enter Regi	ion Enter .	lob Classification Enter Mana ✓ Indirect	eager Enter Organisation
		Indirect	t Employees Sub Organisation
	410009	973 N	
	410005	526 N	
	410000	170 N	
	410005	526 N	
	410005	526 N	
	410005	526 N	
		410005 410005 410005	41000526 N 41000526 N 41000526 N 41000526 N

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

Enter Learning Activity Deta	ails					
* Required						
 Items, Programmes and Comparison 	urricula					Add
Title	Туре	Assignment Type	Priority	*Assigned	Required Date	
Introduction to UCT for new staff	ප @	Required 🗸		16/5/2025 🛱	31/8/2025	₿×
S Development Dialogue Training	පි 🖞	Required 🗸		16/5/2025 🛱	31/7/2025	ë ×
 Employees 						Add
Name						Remove
0						×
N						×
J						×
					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.



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.

, , , , , , , , , , , , , , , , , , , ,	•				
Confirm Details					
Items, Programmes and Curricula					
Title	Туре	Assignment Type	Priority	Assign Date	Required Date
Introduction to UCT for new staff	<u>ደ ወ</u>	REQ		16/5/2025	31/8/2025
Development Dialogue Training	<u>ደ ወ</u>	REQ		16/5/2025	31/7/2025
Employees					
Name					
0					
N					
J					
				Assign Lea	rning Cancel

Click Assign Learning

10. The Successfully Assigned page appears.

Successfully Assigned	
The items/programmes/curricula have been successfully added to the specified employees. If the curricula/programme were already assigned re-assigned	, they will not be
	Close

- 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.

Required Learning (2)	Important Learning (2)	Invest in Myself (0)		
Required Learning	(2)		Required Learning (2)	Important Learning (2)
Development Dialogu	e Training		Important Learning	(2)
Instructor-Led • 2h 0m			Adobe Acrobat Essent	ial skills
Introduction to UCT f Due on 31/8/2025 Instructor-Led with Onl	or new staff ine Content ● 7h 0m		Developing Your Emot External-Course	ional Intelligence (2017)

_

Removing assigned learning from multiple team members

Procedure

_

-

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

Learning Home Page / Team View		L 's Learning	
Team View	•••	8 L Constant	
		Required Learning (3) Important Learning (1) Invest in Myself (2)	
Programme Officer (20050606)	>	Required Learning (3)	7 ~
A A Administrative Officer (20032358)	>	Introduction to UCT for new staff Due on 31/8/2025 Instructor-Led with Online Content 7h 0m	Register

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

sign/Remove Learning	
Select the action you would like to take:	
+ Assign Learning	Remove Assigned Learning
Assign items, programmes and curricula to one or more employees.	You can remove items that were not assigned either by an administrator or through the curricula.
	С

Click Remove Assign Learning.

3. The *Remove Assigned Learning* page appears.

Rem	nove Assigned Learning	
E	inter Learning Activity Details	
*	Required	
	 Items and Programmes 	Add
	There are no items or programmes selected.	
	 Employees 	Add
	There are no employees selected.	
	Continue	Cancel

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

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

Select Desired Courses from Libra	ry			×
Se	arch	Q	Language & Currency	
394 Courses				
			(;;;) :≡	Sort By Relevance 🗸
Refine By				
Learning Type				
✓				
×				
Delivery Method				
✓ Categories	Achieving Strategy throu (CRSE 8010)	ugh Operationa	Adobe Acrobat Essential sk (CRSE 6017)	cills
- -				
	Select	L Mara	Salast	L More
	Select	↓ More	Select	↓ More

- 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 \times Close in the top right of the Select Desired Courses from Library dialogue box.

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

Remove Assigned Learning										
E *1	Inter Learning Activity Detail									
	 Items and Programmes 			Add						
	Title	Туре	Priority							
	S Development Dialogue Training	<u>ዳ</u> @		×						
	 Employees 			Add						
	There are no employees selected.									
				Continue Cancel						

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.

Sel	Select Employees										
	Employees	Region	Job Classification	Manager	Organisation						
	Enter Employees	Enter Region	Enter Job Classification	Enter Manager	Enter Organisation						
				✓ Indirect Employees	Sub Organisation						
	С		41000973	Ν	Î						
\Box	D		41000526	Ν							
	E		41000070	Ν							
\Box	I		41000526	Ν							
\Box	L		41000526	Ν							
\Box	М		41000526	Ν							
					•						
					Cancel						

- Select individual employees using the \Box checkboxes or click \Box 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.

Remov	Remove Assigned Learning									
Enter	Learning Activity De	etails								
~ 1	tems and Programmes			Add						
Title		Туре	Priority							
S	Development Dialogue Training	<u>ද</u>		×						
~ E	Employees			Add						
Nam	e			Remove						
0				×						
N				×						
J				×						
				Continue Cancel						

Click

8. The *Confirm Details* page appears.

Confirm Details		
Items and Programmes		
Title	Туре	
Development Dialogue Training	<u> 오</u> 뽀	
Employeer		
Linpioyees		
Name		
N		
J		
	Remove Learning	Cancel

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.

Remove Assigned Learning	
Confirmation:	
The Items and or Programmes were removed successfully.	
	Close

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

_

Registering multiple team members for a class

Procedure

-

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

Learning Home Page / Team View		L 's Learning	
Team View Search people	••• Q	A Programme Officer (20050606)	
L Programme Officer (20050606)	>	Required Learning (3) Important Learning (1) Invest in Myself (2) Required Learning (3)	<u> २</u> ~
A A Administrative Officer (20032358)	>	Introduction to UCT for new staff Due on 31/8/2025 Instructor-Led with Online Content • 7h 0m	Register

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

egister/Withdraw Employees	
Select the type of action you would like to take:	
 Register Employees Register Employees into a class. 	 𝒫_⋆ Withdraw Employees Withdraw Employees from a class.
	Car

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

Register Employees for Class	
Enter Registration Details	
* Required	
✓ Class	Add
No class selected	
 Employees 	Add
No employees selected	
	_
	Continue Cancel

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

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

Select Desired Courses from Library X											
						Searc	h		Q Language & Currency		
8					_						
Co	urses										
(In sta									() :=)	Sort By Delayana	
Defi	Instructor Lec Sort By Relevance V										
Refir	е ву							MAN	Development Dialogue Trai	Select	
<		Ma	у	2	025		>	22	22/5/2025 09:00 AM - 22/5/2025 11:00 AM		
	Mon	Tue	Wed	Thu	Fri	Sat	Sun		Cambria House -		
18	28	29		1	2	3	4		23 seats available		
19	5	6	7	8	9	10	11			↓ More	
20	12	13	14	15	16	17	18				
21	19	20	21	22	23	24	25	MAY	Computer Literacy - Comp	Select	
22	26	27	28	29	30	31	1	26	26/5/2025 09:00 AM - 6/6/2025 04:00 PM		
23	2	3	4	5	6	7	8	20	O Computer Lab		
⊞	Hide Le	gend							10 seats available		
	Today				Non-W	orking I	Day			↓ More	
	Selecte	d Dav			Class						
	Tronking	buy							Introduction to UCT for ne	Select	
Learning Type									27/5/2025 09:00 AM -		
Instructor Led V							~	Ζ1	27/5/2025 05:00 PM 23 seats available		
Location Clear							Clea				
Sourc	e						*				
							~			↓ More	

- 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.

Register Employees for Class		
Enter Registration Details		
* Required		
 Class: Memory Skills 		Change Class
Start Date/Time: 7/7/2025 08:30 AM Africa/Johannesburg	Description : July 2025	
Facility & Location: Cambria House - Cambria Training Room	Associated Item: CRSE 56004	
Available Seats: 1 of 20 enrolled, 0 waitlisted		
 Employees 		Add
No employees selected		
		Continue Cancel

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

Sel	Select Employees									
	Employees	Region	Job Classification	Manager	Organisation					
	Enter Employees	Enter Region	Enter Job Classification	Enter Manager	Enter Organisation					
				Indirect Employees	Sub Organisation					
\Box	С		41000973	Ν	Î					
\Box	D		41000526	Ν						
\bigcirc	E		41000070	N						
\bigcirc	1		41000526	Ν						
	L		41000526	Ν						
\Box	М		41000526	Ν						
					Cancel					

- 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 with a lighter coloured 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 Add.
 Note: The Add button only appears after at least one employee is selected.

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.

	r		
lease correct the	following errors before proceeding:		
A conflictA conflict	was detected against User J for was detected against User J for	r class English for Everyone (Start: 8/7/2025, End r class English for Everyone (Start: 7/7/2025, End	l: 8/7/20 l: 7/7/20
Either choose	e a different class by clicking Change C	and selecting the appropriate class	5.
Or remove th	ie affected employee using the $ imes$ butto	on in the <i>Remove</i> column.	
ne Register Emp	ployees for Class page reappears, displa	aying the selected employees.	
Register Emp	oloyees for Class		
Enter Regist	ration Details		
* Required			
✓ Class: Me	emory Skills 💊	Change Cl	ass
Start Date/Time:	7/7/2025 08:30 AM Africa/Johannesburg Des	cription : July 2025	
Facility & Location Available Seats:	n: Cambria House - Cambria Training Room Asso	ociated Item: CRSE 56004	
	z or zo enrolled, o wallisled		
	2 of 20 enrolled, o waltisted		
✓ Employee	es		Add
 Employee 	es		Add
 Employee Name 	es * Registration Status Payment	Method Account Comments Rem	Add
 Employee Name N 	Registration Status Active Enrolment (Enrolled)	Method Account Comments Rem	Add
 Employee Name N 	Registration Status Active Enrolment (Enrolled)	Method Account Comments Rem (+) ×	Add
 Employed Name N O 	es * Registration Status Payment Active Enrolment (Enrolled) ~	Method Account Comments Rem	Add
 Employed Name N O 	es Registration Status Payment Active Enrolment (Enrolled) ~ Active Enrolment (Enrolled) ~	Method Account Comments Rem 	Add
 Employee Name N O 	es Active Enrolment (Enrolled) ~ Active Enrolment (Enrolled) ~	Method Account Comments Rem ⊕ × ⊕ ×	Add

- 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:		
• L	is already registered in to a different class "77010" with the "Active Enrolment" status for the "Memory Skills".	
Do you wish to proce	ed?	
	Yes	No

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

8.

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

Register Employ	ees for Class										
Confirm Registra	ation Details										
Class: Memory Skills (🔇	lass: Memory Skills 🔇										
Start Date/Time: 7/7/2 Facility & Location: Ca	Start Date/Time:7/7/2025 08:30 AM Africa/JohannesburgDescription : July 2025Facility & Location:Cambria House - Cambria Training RoomAssociated Item:CRSE 56004										
Dietary Requirements: Food Allergies: Disability Accommoda	Dietary Requirements:										
Employees											
Name	Registration Status	^D ayment Method	Comments								
С	Active Enrolment(Enrolled)										
E	Active Enrolment(Enrolled)										
Notify: ✓ Users 🗌 Instr	uctors 🗌 Managers 🗌 Others	i .									
			Register Emp	loyees 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 Register Employees
- 11. The Successfully Registered page appears.

Successfully Registered	
All registrations in this class were successful.	
Register or withdraw more employees	
	Close
Click Close to return to the <i>Team View</i> page.	

Withdrawing multiple team members from a class

Procedure

_

-

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

Learning Home Page / Team View		L 's Learning	
Team View		A L E Programme Officer (20050606)	
Search people	Q	Required Learning (3) Important Learning (1) Invest in Myself (2)	
L Programme Officer (20050606)	>	Required Learning (3)	7 -
A A Administrative Officer (20032358)	>	Introduction to UCT for new staff Due on 31/8/2025 Instructor-Led with Online Content • 7h 0m	Register

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

gister/Withdraw Employees	
Select the type of action you would like to take:	
 Register Employees Register Employees into a class. 	𝒫_⋆ Withdraw EmployeesWithdraw Employees from a class.

Click Withdraw Employees.

3. The Withdraw Employees from Class page appears.

Withdraw Employees from Class	
Enter Registration Details	
* Required	
✓ Class	Add
No class selected	
 Enrolled Employees 	
Select a class to view registered employees	
	Continue Cancel
To choose a schoduled class to withdraw an employee from	click Add on the right (in line w

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

Withdrawing multiple team members from a class (continued)

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

Selec	Select Desired Courses from Library X									
						Searcl	h		Q Language & Currency	
8										
Co	urses									
Instru	uctor Le	90								Sort By Relevance 🗸
Refir	ne By								Development Dislative Tesi	Column 1
								MAY		Select
<		Ma	У	2	025		>	22	C 22/5/2025 11:00 AM	
	Mon	Tue	Wed	Thu	Fri	Sat	Sun		Cambria House -	
18	28	29	30	1	2	3	4		23 seats available	
19	5	6	/	8	9	10	11			↓ More
20	12	20	14	12	10	1/	18			
22	26	20	21	20	30	31	1	MAY		Select
23	20	3	4	5	6	7	8	26	6/6/2025 04:00 PM	
	~		-	5	0	,	0		Ocomputer Lab	
	Today	egend			Non-W	orking [Dav		10 seats available	
	Selecte	d			Class	onding t	Juy			↓ More
	Working	g Day								
Learni	ing Typ	e						MAY	Introduction to UCT for ne	Select
Instru	ictor Le	ed					~	27	€ 27/5/2025 05:00 AM - 27/5/2025 05:00 PM	
Locati	on						Clear		23 seats available	
Course							~			
Source	e						~			↓ 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 multiple team members from a class (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.

Withdraw Empl	oyees from Class									
Enter Registrati	on Details									
* Required	equired									
Start Date/Time: 7/7/ Facility & Location: C	2025 08:30 AM Africa/Johannesburg Cambria House - Cambria Training Room	Description : July 2025 Associated Item: CRSE 56004								
 Enrolled Emp 	bloyees									
Name	Registration Status	* Withdrawal Reason	Select All Withdraw							
Ν	Active Enrolment(Enrolled)	•								
0	Active Enrolment(Enrolled)	•								
			Continue Cancel							

In the Enrolled Employees section:

- Select a Withdrawal Reason for each person.
- Select the employee/s to withdraw using the \Box checkboxes in the *Withdraw* column on the right.
- Click Continue

Withdrawing multiple team members from a class (continued)

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

Class: Memory Skil								
Class: memory Skills								
Start Date/Time: Primary Locatior	Start Date/Time: 7/7/2025 08:30 AM Africa/Johannesburg Description: July 2025 Primary Location: Cambria House - Cambria Training Room Associated Item: CRSE 56004							
Employees to be W	lithdrawn							
Uner	Organization	linear	Title	Class ID	User can Se			
User	Organisation	item	Titte	Class ID	Register			
С	Coll of Accounting: Operations & Admin	CRSE 56004 (Rev 3/4/2024 02:08 PM Africa/Johannesburg)	Memory Skills	77009	No			
	0-11-5	CRSE 56004						
E	Accounting: Operations & Admin	(Rev 3/4/2024 02:08 PM Africa/Johannesburg)	Memory Skills	77009	No			
Notify:								
✓ Users	Instructors 🗌 Man	agers 🗌 Others						
Remove as	sociated item from the	Learning Plan						

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



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.

Learning Home Page / Team View		L 's Learning	
Team View Search people Q		A L E Programme Officer (20050606)	
L		Required Learning (3) Important Learning (1) Invest in Myself (2)	
Programme Officer (20050606)		Required Learning (3)	۷ ×
A Administrative Officer (20032358)	>	Introduction to UCT for new staff Due on 31/8/2025 Instructor-Led with Online Content • 7h 0m	Register

- Click *More Manager Actions* (top left) and choose *Add to Learning History*.
- 2. The Add to Learning History page appears.

Add to Learning History

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



- 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.

Add to Learning Histo	ory	
Enter Event Details		
Required*		
External Event		
Description*		Total Hours:
Completion Date:(d/M/yyyy)*	21/5/2025	(1000)
Completion Time:(hh:mm AM/PM) *	12:49 PM	Contact Hours: (1000)
Time Zone:*	South Africa Standard Time (Africa/Johannesbu	Credit Hours: (1000)
Instructor ID:	Q	CPD: (1000)
Name of Training Provider / Learning Institution:		(2007)
\ominus 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 \oplus *EmployeesAdd* to add the employees that attended the external event.
- 4. The Select Employees dialogue box appears.

Employees	Region	Job Classification	Manager	Organisation
Enter Employees	Enter Region	Enter Job Classification	Enter Manager	Enter Organisation
			✓ Indirect Employees	Sub Organisation
С		41000973	N	
D		41000526	Ν	
E		41000070	Ν	
I		41000526	N	
L		41000526	Ν	
М		41000526	Ν	

- Select individual employees using the \Box checkboxes or click \Box 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.

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

Add to Learning Histo	ory		
Enter Event Details			
Required*			
External Event			
Description*	Customer Service Essentials		
Completion Date:(d/M/yyyy)* Completion Time:(hh:mm AM/PM)*	5/5/2025 💼 05:00 PM	Total Hours: (1000) Contact Hours: (1000)	8
Time Zone:* Instructor ID: Name of Training Provider / Learning Institution:	South Africa Standard Time (Africa/Johannesbu Q CS Skills	Credit Hours: (1000) CPD: (1000)	
🕞 Employees 🕂			Assign Defaults
Name Grade		Comme	ents Remove
Ν		Q	8
L		Q	\otimes
0		Q	\otimes
Back		C	ontinue Cancel

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

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

Add to Learning H	listo	ry				
Confirm Learning Details						
Item: Rev						
Description: Customer Service Essentials						
Completion Date: 5/5/2025			Total Hours: 8.00			
Completion Time: 05:00 PM Africa/Johannes	burg		Contact Hours:			
Instructor: CS Skills			Credit Hours.			
			CPD:			
Employees						
Name	Grade	Comments		Costs	Amount	
Ν						
J						
0						
Back					Add to Learning History	Cancel

Click Add to Learning History

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

Add to Learning History		
Recording Status		
Learning Recorded Successfully		
Item: Customer Service Essentials Rev:		
• C	File Attachments (0)	
• D	File Attachments (0)	
• E	File Attachments (0)	
	Close	

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

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

• The *File Attachments* dialogue box appears.

File Attachments	5	X
File Attachment: File Description:	Choose File No file chosen	
There are no attachm	Upload nents.	

- 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.

File Attachme	ents			X
File Attachment: File Description:	Choose File	No file chosen	1	
	Upload			
Remove File Na	me	Description	Date Added	Size (KB)
certificate.	odf		21/5/2025	25

- 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 Close to return to the *Team View* page. The recorded external learning will appear in each team member's <u>Learning History</u>.