

SuccessFactors Learning guide for employees

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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.

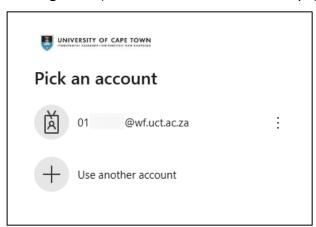
Support

If you are unable to access SuccessFactors or are experiencing other technical difficulties, please contact the IT-service Desk.

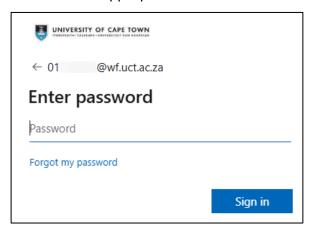
Procedure

- 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 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 step 4).

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



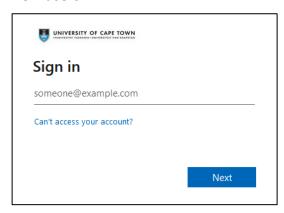
Select the appropriate account.



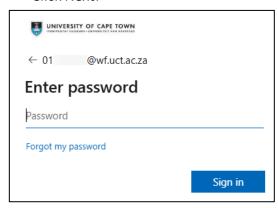
- Enter your *Password* and click *Sign in*.
- You will be prompted to verify your login either via Microsoft Authenticator or a code sent to your phone as an SMS. SuccessFactors will open (see step 4).

Logging in to SuccessFactors via a browser (continued)

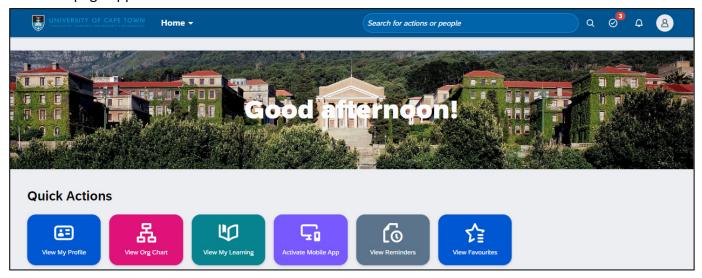
New users



- 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.



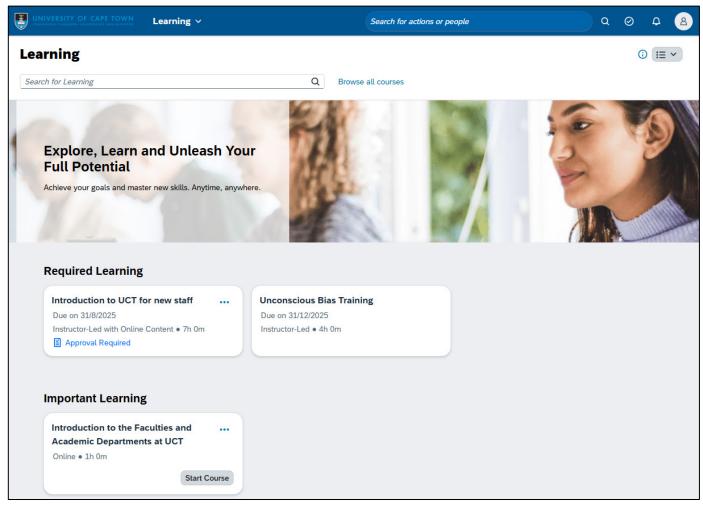
- Enter your Password and click Sign in.
- You will be prompted to verify your login either via Microsoft Authenticator or a code sent to your phone as an SMS.
- 4. The Home page appears.



- Click the View My Learning tile to work with courses (e.g. search the course library, register for classes).
- Other options on the *Home* page include: <u>Changing SuccessFactors settings</u>, <u>Viewing and updating your employee profile</u>, <u>Viewing the org chart and Installing the SuccessFactors mobile application</u>.

Logging in to SuccessFactors via a browser (continued)

5. The Learning page appears.

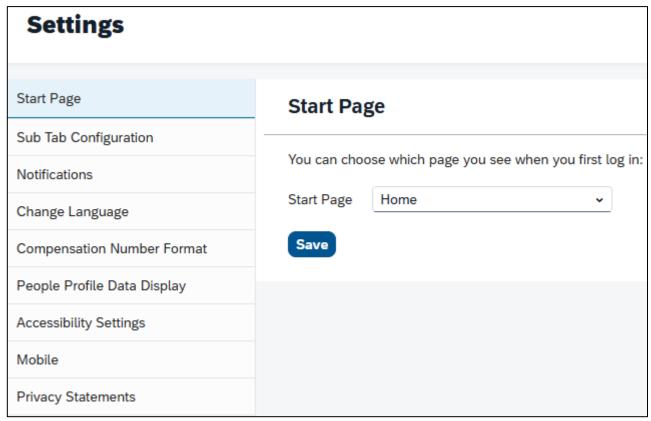


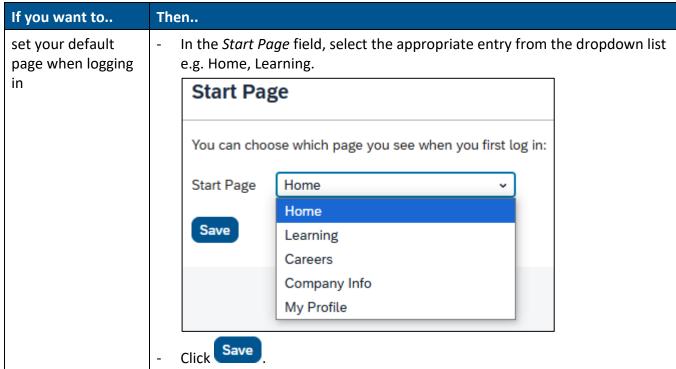
- The *Required Learning* and *Important Learning* sections show any courses assigned to you by the System Administrator or your line manager.
- The Invest in Myself section appears further down the page, when you've assigned courses to yourself.

Page	Tasks
Learning	Searching the course library
(available to all employees)	Viewing detailed course information
	Assigning courses to yourself
	Registering on a course assigned to you
	Registering on a course from the course library
	Recommending a course from the course library
	Viewing course recommendations
	Requesting a class
	Withdrawing from a class
	Recording external learning
Team View	See: <u>SuccessFactors Learning guide for managers</u> for instructions on:
(only available to managers)	Viewing team learning plans and learning history
	Processing pending approval requests
	Assigning and removing learning to/from team members
	Registering and withdrawing team members on/from classes
	Recording external learning

Changing SuccessFactors settings

- 1. Log in to SuccessFactors and access the Home page.
 - In the top right of the screen, click Account Navigation and choose 🥸 Settings.
- 2. The Settings page appears, displaying the Start Page section.





set accessibility settings

- Click Accessibility Settings
- The Personal Accessibility Settings section appears.

Personal Accessibility Settings

Accessibility refers to the ability of all users to access and interact with the application, including those who use assistive technologies. You can use these settings to optimise the application to suit your needs and preferences. Please note that Enhanced Keyboard Navigation, Enhanced Screen Reader Support, and Colour Vision Adjustments are not supported in all areas of the application.

Enhanced Screen Reader Support

Colour Vision Adjustments

High Contrast

Enhanced Keyboard Navigation

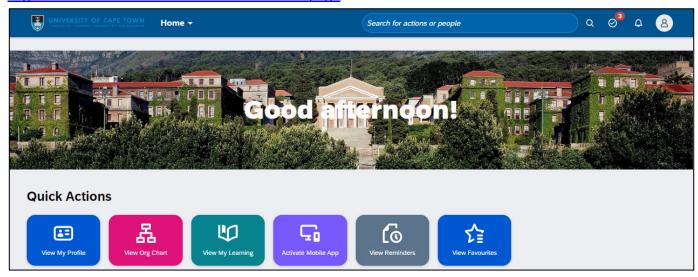
Save

- Select one or more of the 4 available options and any additional options that may appear after your initial selection.

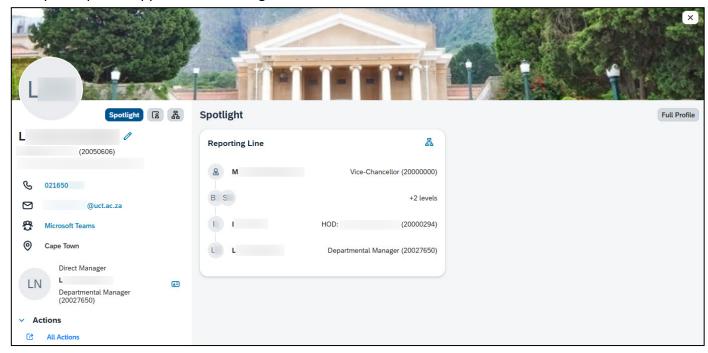
- Click Save

Viewing your public profile

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



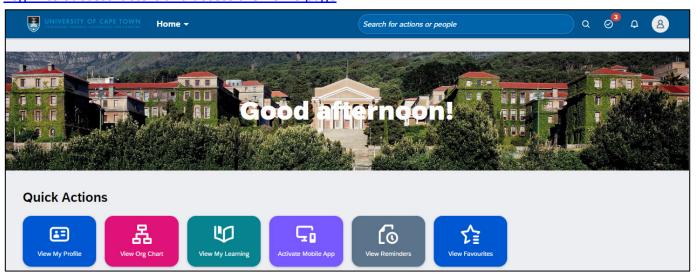
- In the top right of the screen, click Account Navigation and choose Public Profile.
- 2. Your public profile appears from the right.



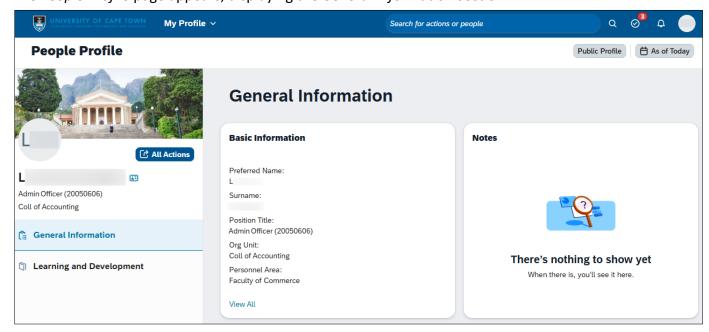
- Click Full Profile to view your full employee profile.
- Click Open Organisation Chart to view the org chart.

Viewing your full employee profile

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



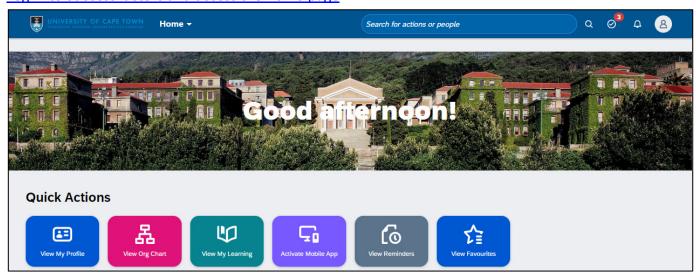
- Click the View My Profile tile.
- 2. The People Profile page appears, displaying the General Information section.



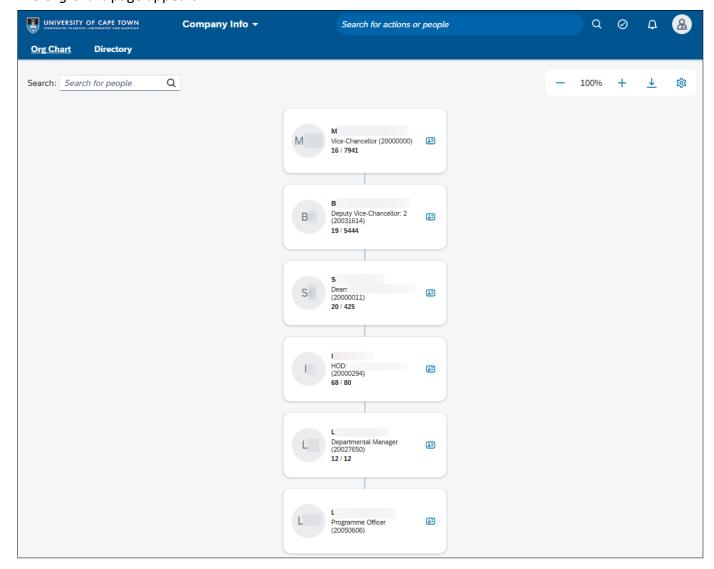
- Click *Learning and Development* to view a high-level summary of your learning history and learning in progress.
- Click the UCT logo to return to your home page.

Viewing the org chart

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



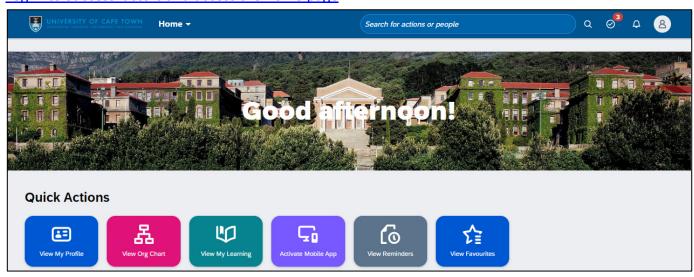
- Click the View Org Chart tile.
- 2. The *Org Chart* page appears.



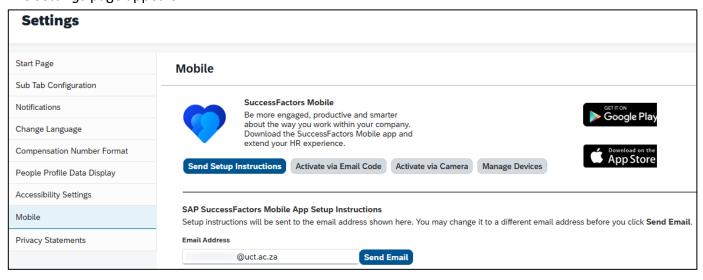
- Click $\stackrel{1}{\cancel{--}}$ Export to save a copy of the organisational chart, either as a PDF or an image file.
- Click the UCT logo to return to your home page.

Installing the SuccessFactors mobile application

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



- Click the Activate Mobile App tile.
- 2. The Settings page appears.



- On your Android or Apple device, download the *SuccessFactors* app from the Google Play or Apple App Store.
- Once the app is downloaded, find the link to log in with a QR code (if applicable, allow the app access to your device's camera).

- In SuccessFactors, click Activate via Camera

Installing the SuccessFactors mobile application (continued)

3. The Scan QR Code section appears.

Scan QR Code

In the SAP SuccessFactors Mobile app, tap Get Started, then QR Code Activation, and scan the QR code below. The code expires in 30 seconds.

Seconds Remaining

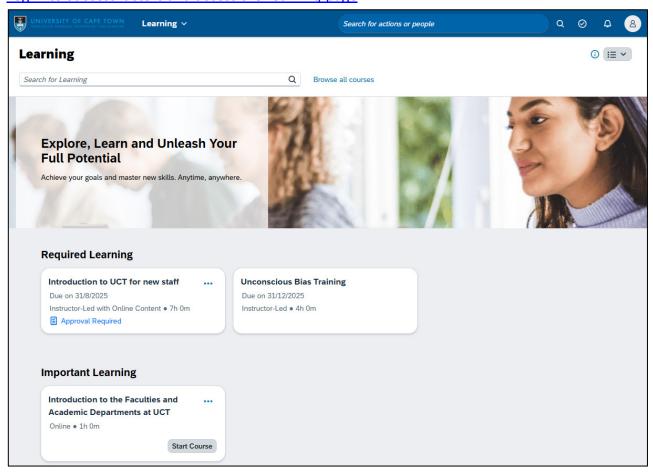
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- Hold your device up to the computer screen so the *SuccessFactors Mobile* app can scan the QR code to connect your UCT account to the mobile app.
- Click the UCT logo to return to your home page.

Searching the course library

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



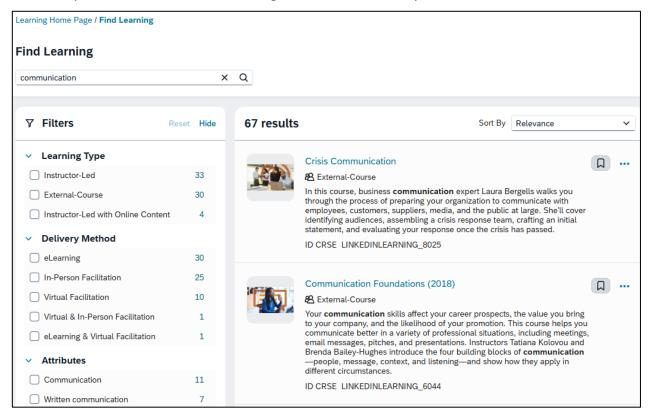
- There are two ways to find courses in the course library:

Search Type	Instructions
Search using a search term / keyword	 Enter the search term in the Search for Learning field. Click Q Search.
Browse all courses	- Click Browse all courses.

Searching the course library (continued)

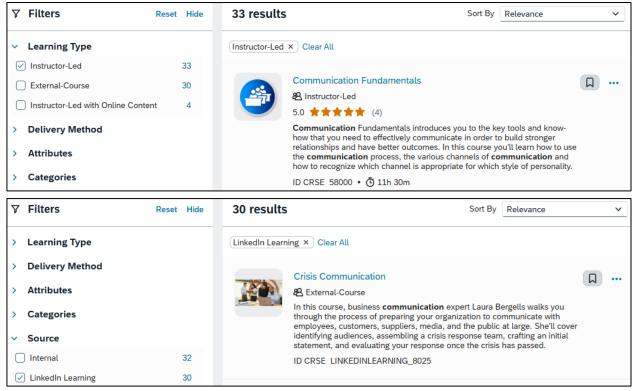
2. The *Find Learning* page appears, displaying the search results.

The example below shows a search using the search term / keyword "communication".



Filters

Use the Filters on the left to see specific groupings of courses e.g. Instructor-Led, LinkedIn Learning.
 The filters can be expanded or collapsed using the arrows on the left. Use Upcoming Classes to find courses that have scheduled classes.



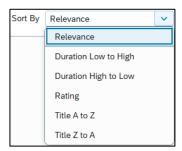
For more information on LinkedIn Learning, see LinkedIn Learning at UCT on the ICTS website.

- Hide the *Filter* by clicking *Hide* or show the *Filter* section by clicking $\sqrt{}$ *Filter*.

Searching the course library (continued)

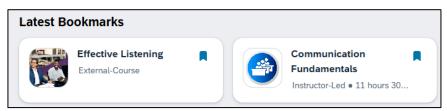
Sort By

- Use Sort By on the right to change the order of the search results.

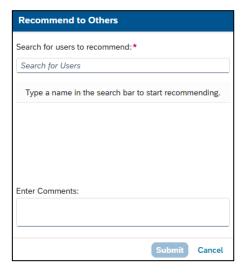


Bookmarks and recommendations

- **Bookmarks**: Click Bookmark on a course you're interested in to access it later in the *Latest Bookmarks* section on your *Learning* page.



- Recommendations to other staff members:
 - Click *** Actions and choose Recommend.



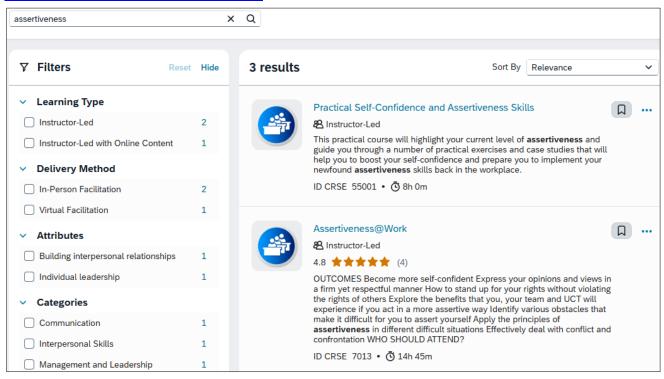
- In the first field, enter a name (or part of name) and select the appropriate person from the search results. Repeat this step to add any additional staff members.
- If appropriate, enter a *Comment*, it will be visible if the person views the course page and clicks the *Suggested By* link.
- Click Submit
- A message briefly appears near the bottom of the page, confirming the recommendation was sent. Recommendations will appear on the staff member's *Learning* page in the *Suggested for Me* section.

Course Details

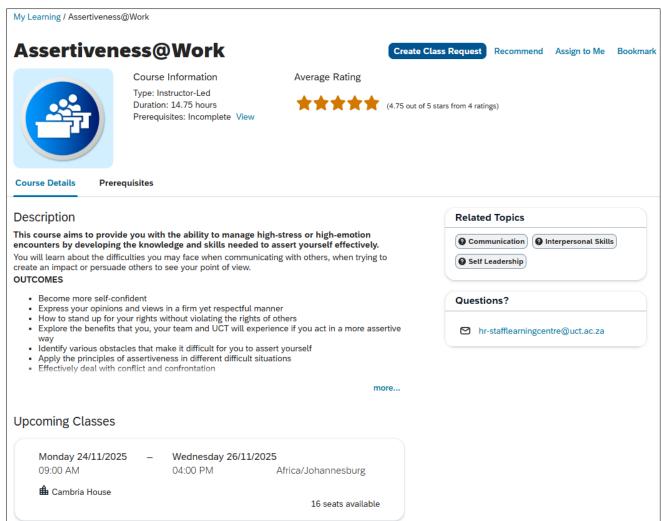
• See: <u>Viewing detailed course information</u> (next page) for the length of the course, contact information, prerequisites, delivery method and any upcoming classes.

Viewing detailed course information

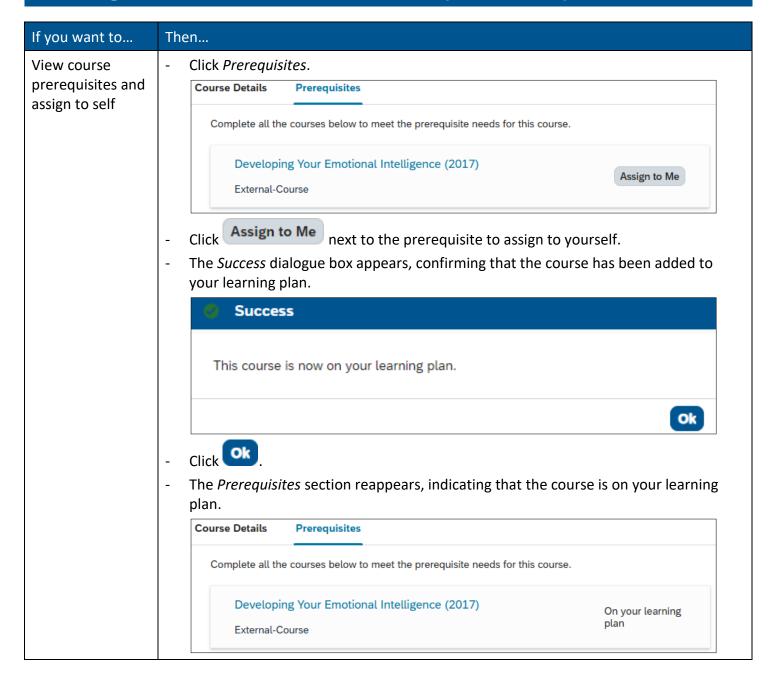
1. Search for a course in the course library.



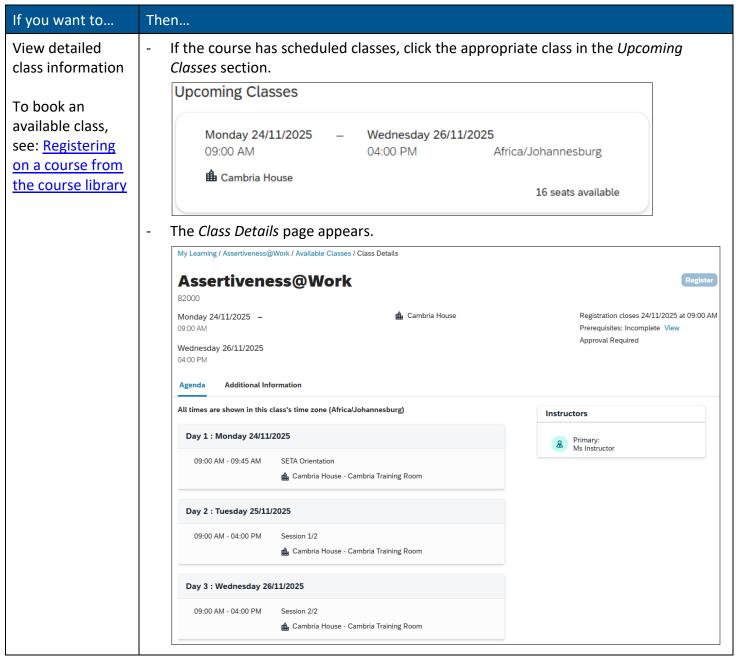
- Click the course title e.g. Assertiveness@Work.
- 2. A new browser window/tab opens, showing detailed course information such as the course description, duration and contact details.



Viewing detailed course information (continued)



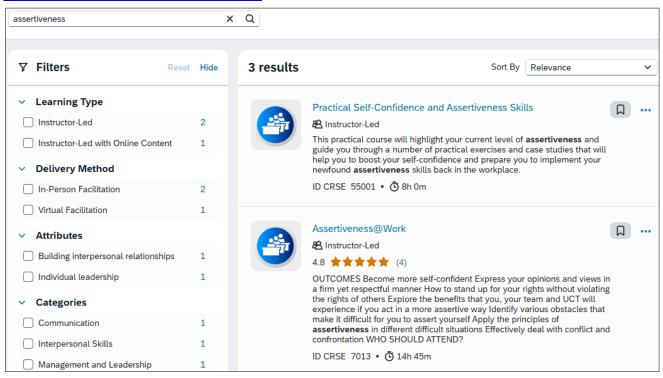
Viewing detailed course information (continued)



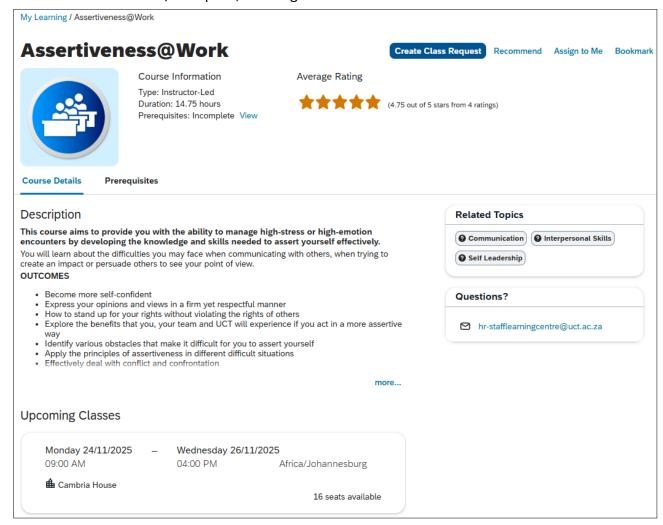
Close the browser window/tab to return to the Find Learning page.

Assigning courses to yourself

1. Search for a course in the course library.



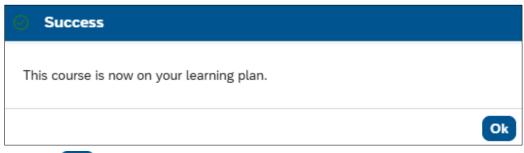
- Click the course title e.g. Assertiveness@Work.
- 2. A new browser window/tab opens, showing detailed course information.



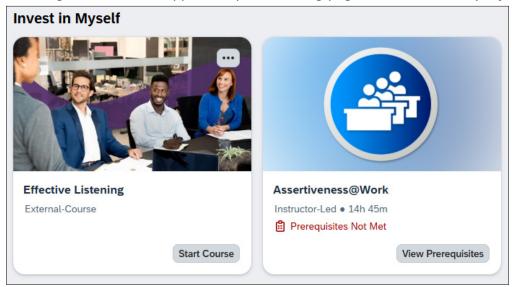
Click Assign to Me.

Assigning courses to yourself (continued)

3. The Success dialogue box appears, confirming the course is on your learning plan.



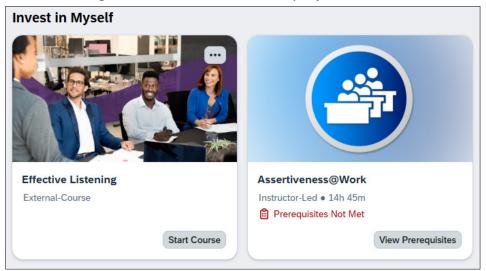
- Click Ok
- 4. The course information page reappears.
 - The assigned course will appear on your *Learning* page in the *Invest in Myself* section.



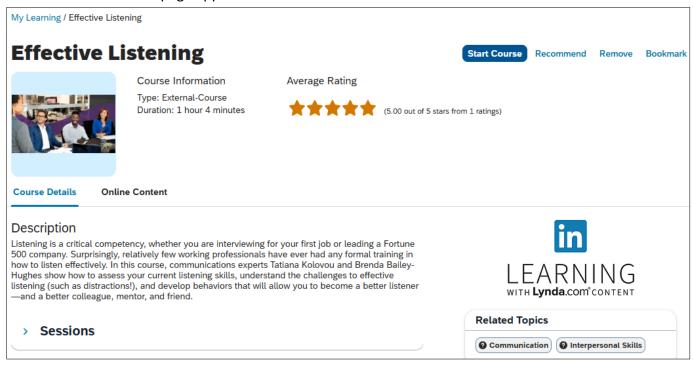
- Close the browser window/tab to return to the Find Learning page.

Removing a self-assigned course

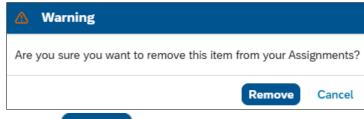
- 1. Log in to SuccessFactors and access the Learning page.
- 2. Find a self-assigned course in the *Invest in Myself* section.



- Click the course title e.g. Effective Listening.
- 3. The course information page appears.



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



- Click Remove
- A message briefly appears near the bottom of the page, confirming the course was removed from your learning assignments.
- Click My Learning (top left) to return to the Learning page.

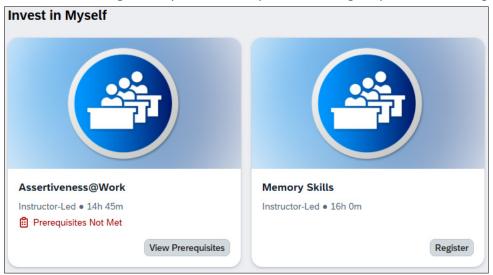
Registering on a course assigned to you

Before you begin

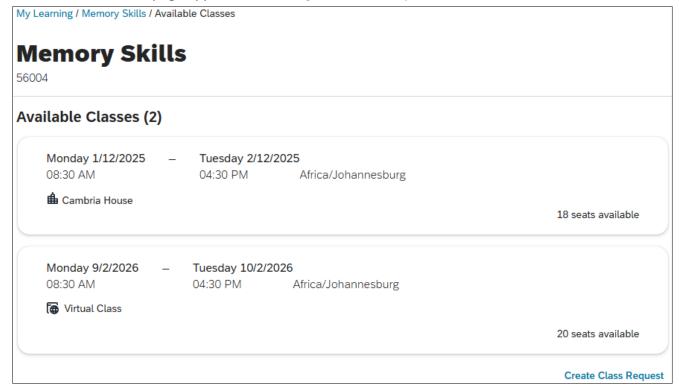
Courses <u>assigned by yourself</u> or your manager appear on the *Learning* page in the *Required Learning*, *Important Learning* or *Invest in Myself* sections. You will only be able to register on courses that have classes (i.e. dates have been set).

Procedure

- 1. Log in to SuccessFactors and access the Learning page.
- 2. Find a course assigned to you in the Required Learning, Important Learning or Invest in Myself sections



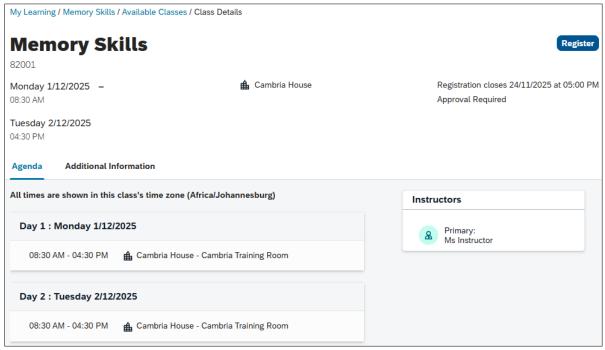
- Click Register
- 3. The Available Classes page appears. Scheduling conflicts for any of the classes will be indicated.



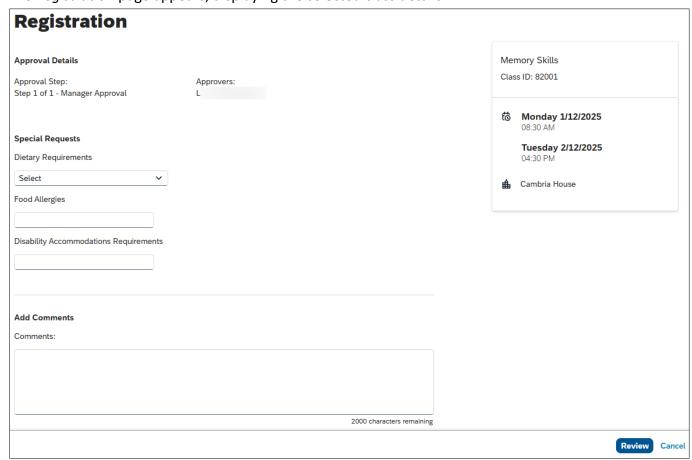
- The available classes are listed including start and end dates, location or virtual class indicator and number of available seats.
- Click a class to complete the registration.

Registering on a course assigned to you (continued)

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.



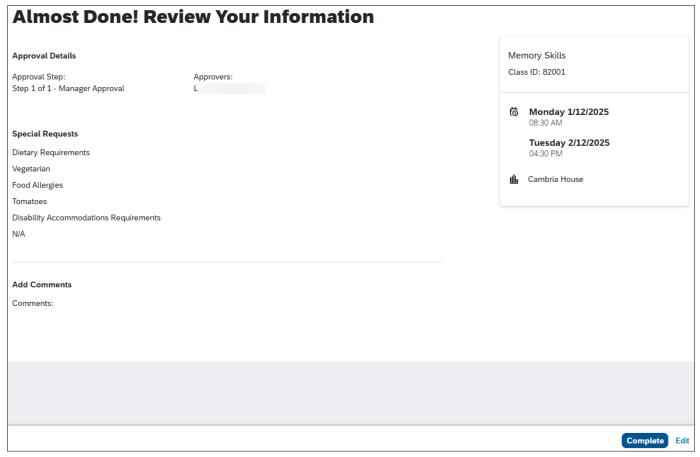
- Click Register
- 5. The Registration page appears, displaying the selected class details.



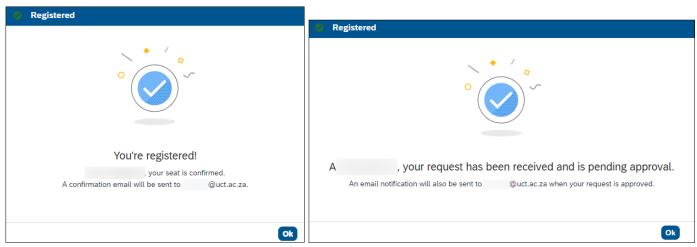
- If registration requires manager approval, the name of the manager receiving the approval request is shown in the Approval Details section.
- Complete any fields appearing in the *Special Requests* section e.g. Fund Number, Cost Centre, Dietary Requirements, Food Allergies, Disability Accommodations Requirements.

Registering on a course assigned to you (continued)

- If the registration requires manager approval, the Comments field is available for completion.
- Click Review
- 6. The Almost Done! Review Your Information page appears.



- Review your registration information, click *Edit* to make changes.
- Click Complete
- 7. The *Registered* dialogue box appears, indicating that you have been registered on the class. If manager approval is required, the registration will be pending.



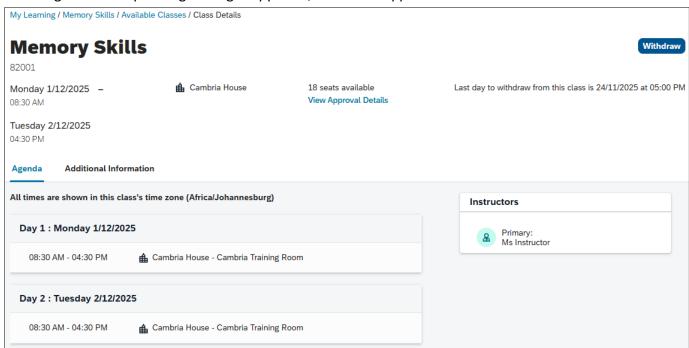
- Click Ok

Registering on a course assigned to you (continued)

8. The Class Details page reappears.

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

If the registration is pending manager approval, click *View Approval Details* to check the status.



- Click My Learning.
- 9. The *Learning* page reappears. The registration status is displayed below the course name. A status of *Class Approval Pending* will change to *Registration Approved* when the manager approves the request.

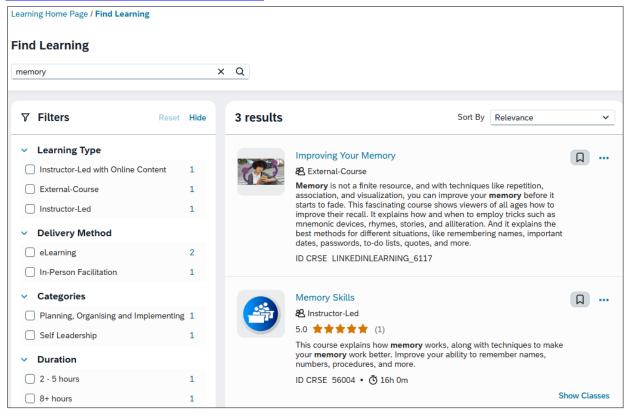




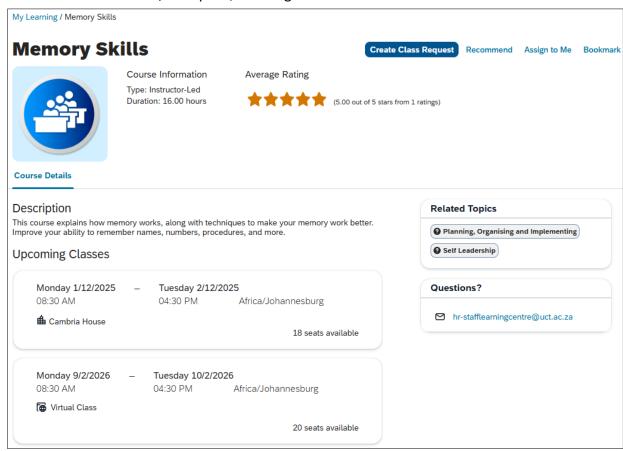


Registering on a course from the course library

1. Search for a course in the course library.



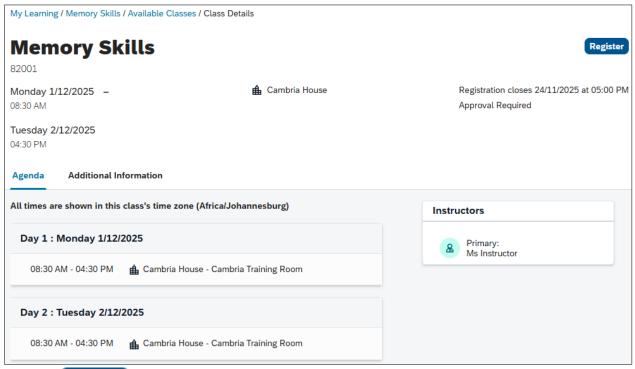
- Click the course title e.g. Memory Skills.
- 2. A new browser window/tab opens, showing detailed course information.



- Available classes are listed in the *Upcoming Classes* section including start and end dates, location or virtual class indicator and number of available seats.
- Click a class to complete the registration.

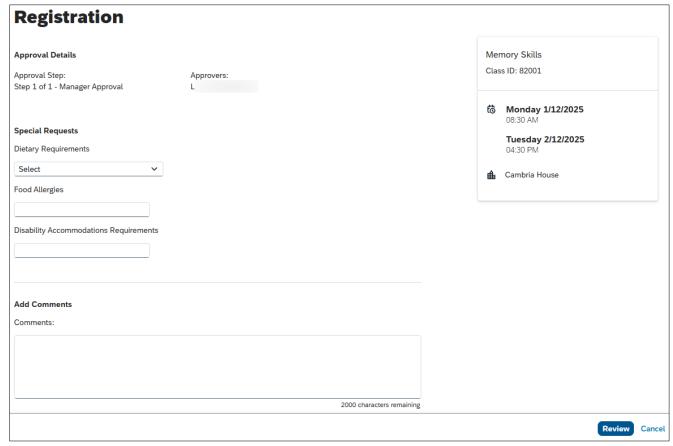
Registering on a course from the course library (continued)

3. 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

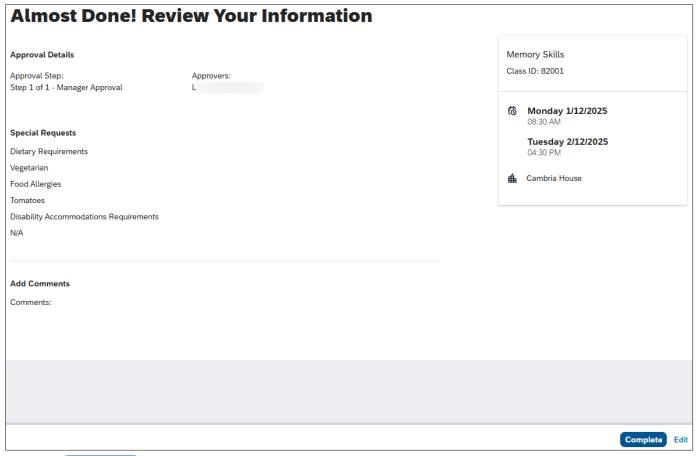
4. The Registration page appears, displaying the selected class details.



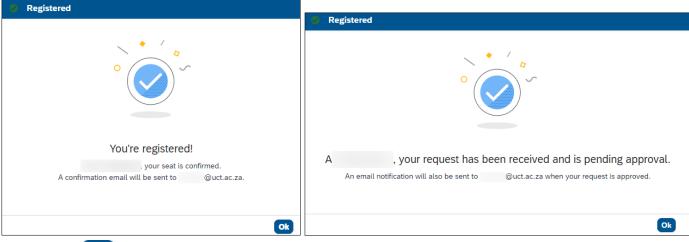
- If registration requires manager approval, the name of the manager receiving the approval request is shown in the *Approval Details* section.
- Complete any fields appearing in the *Special Requests* section e.g. Fund Number, Cost Centre, Dietary Requirements, Food Allergies, Disability Accommodations Requirements.

Registering on a course from the course library (continued)

- If the registration requires manager approval, the *Comments* field is available for completion.
- Click Review
- 5. The Almost Done Review Your Information page appears.



- Click Complete
- 6. The *Registered* dialogue box appears, indicating that you have been registered on the class. If manager approval is required, the registration will be pending.

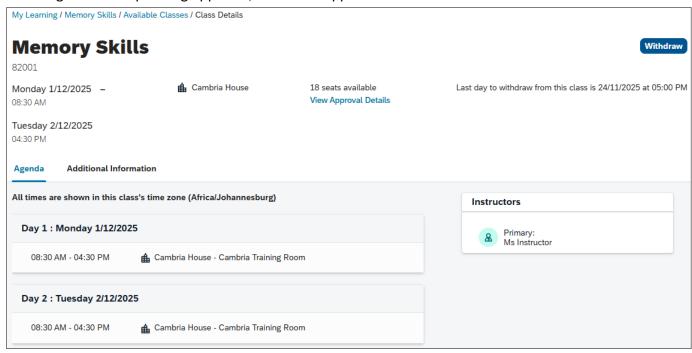


- Click Ok

Registering on a course from the course library (continued)

7. The Class Details page reappears.

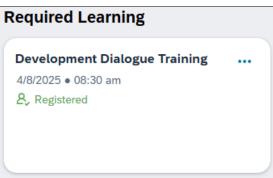
If the course has a withdrawal closing date, the information is shown in the top right. If the registration is pending approval, click *View Approval Details* to check the status.



- Close the browser window/tab to return to the *Find Learning* page. Click *Learning Home Page* to return to your *Learning* page.
- 8. The *Learning* page reappears. The course will appear on your *Learning* page, usually in the *Invest in Myself* section. If the course was previously assigned to you by your manager or the system administrator, it could appear in the *Required Learning* or *Important Learning* section.

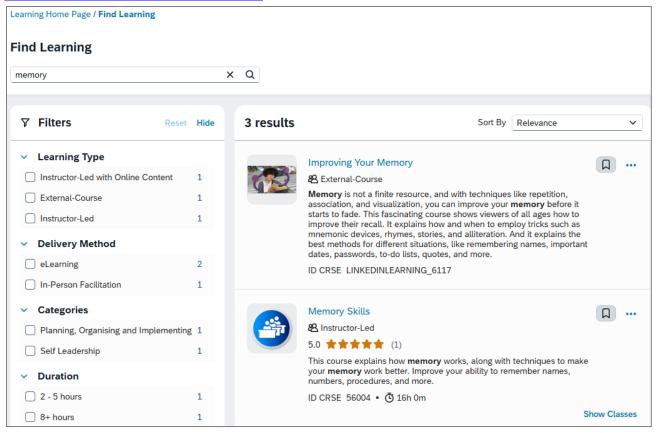




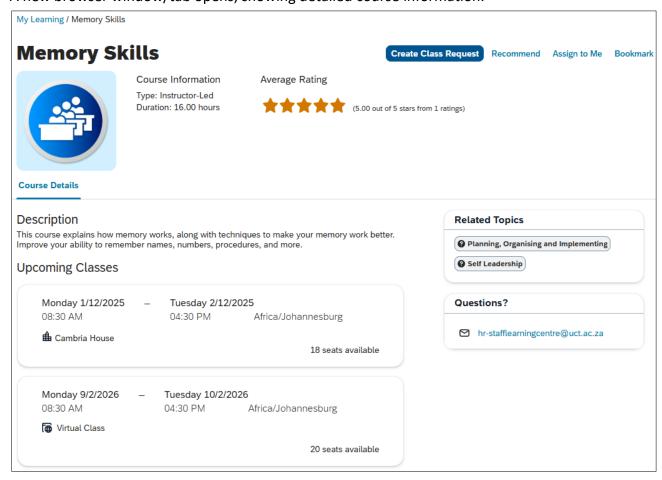


Recommending a course from the course library

1. Search for a course in the course library.



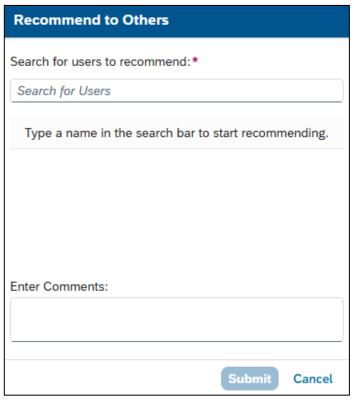
- Click the course title e.g. Memory Skills.
- 2. A new browser window/tab opens, showing detailed course information.



Click Recommend.

Recommending a course from the course library (continued)

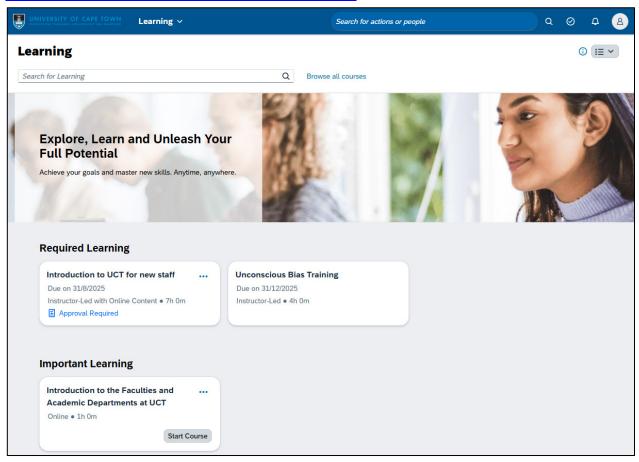
3. The Recommend to Others dialogue box appears.



- In the first field, enter a name (or part thereof) to search for an employee.
- Select the appropriate employee from the search results below the first field.
- Repeat the previous two steps to add any additional employees.
- If appropriate, enter a *Comment*, it will be visible if the person views the course page and clicks the *Suggested By* link.
- Click Submit
- 4. The course details page reappears.
 - A message briefly appears near the bottom of the page, indicating that the recommendation has been sent. **Note**: You may receive an error if the person already knows about the course or can't access it.
 - Click My Learning to return to your Learning page.

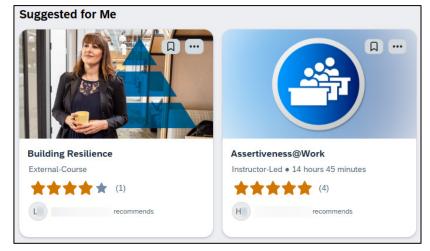
Viewing course recommendations

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



- Scroll down to the *Suggested for Me* section to view any recommendations sent to you.

Note: The section will not appear if you have no recommendations.



- Click the course title to view detailed course information.
 - Click the name in the *Suggested By* section to view any recommendation comments.
 - If the course interests you, click Assign to me or Bookmark.
 - Click My Learning to return. The recommendation will disappear if you assigned or bookmarked the course.
- If not already assigned or bookmarked, you can add the course to the *Latest Bookmarks* section on your *Learning* page by clicking Bookmark.
- If the course doesn't interest you, click ••• More Actions and choose Not Interested to remove the recommendation.

Requesting a class

Before you begin

This feature allows a learner to request a new class for a course, e.g. if they are unable to attend any of the existing scheduled classes. The course administrator determines whether this feature is available so some courses may not have this option.

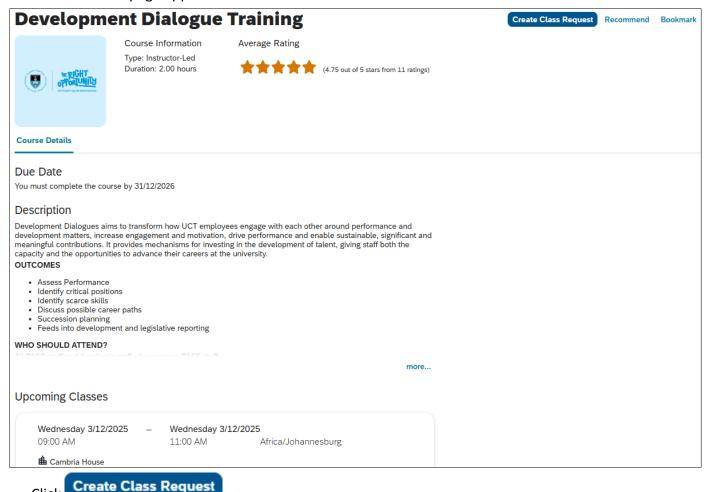
Procedure

- 1. Log in to SuccessFactors and access the Learning page.
- 2. Find a course assigned to you (either by yourself, your manager or the system administrator) in the *Required Learning, Important Learning or Invest in Myself* sections.



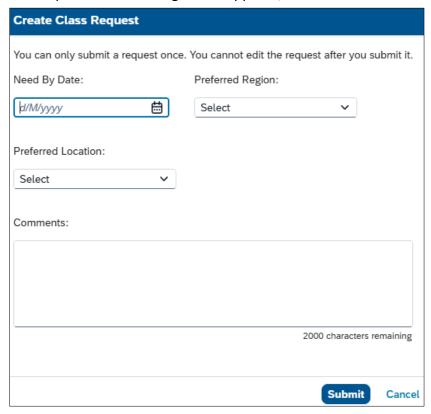
- Click the course title e.g. Development Dialogue Training.
- 3. The course details page appears.

Click

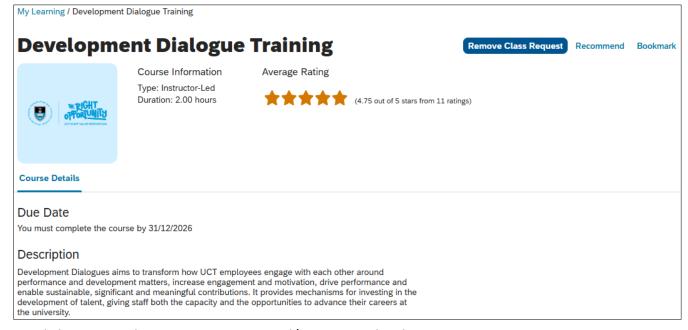


Requesting a class (continued)

4. The Request a Class dialogue box appears, with the Course Details page in the background.



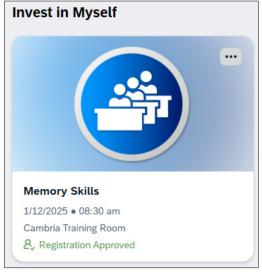
- Enter or select the date by which you need to complete the course in the Need By Date field.
- Select (Western Cape) as the Preferred Region.
- Select the Preferred Location from the dropdown list.
- Enter any Comments.
- Click Submit
- 5. The course details page reappears. A message briefly appears near the bottom of the screen, indicating that the request was submitted. If the course wasn't already assigned to you, it will be added to your learning assignments.



- Click *Remove Class Request* to view and/or remove the class request.
- Click My Learning to return to your Learning page.

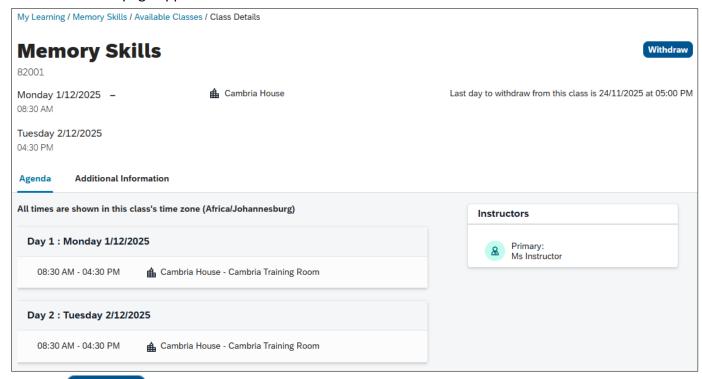
Withdrawing from a class

- 1. Log in to SuccessFactors and access the Learning page.
- 2. Find the course you're registered on in the *Required Learning*, *Important Learning* or *Invest in Myself* sections.





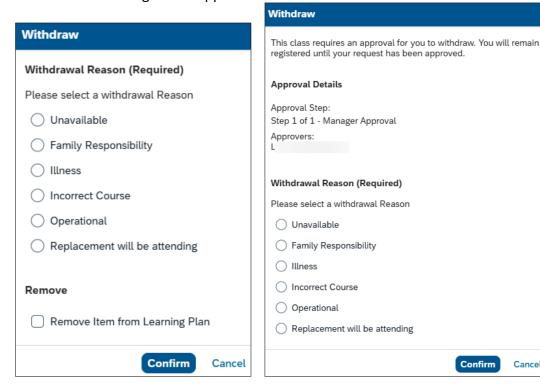
- Click ••• More Actions in the top right of the course tile and choose View Registration.
- 3. The Class Details page appears.



- Click Withdraw

Withdrawing from a class (continued)

4. The Withdraw dialogue box appears.

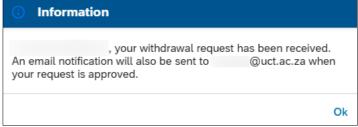


- If withdrawing requires manager approval, the Approval Details section appears.
- Select the appropriate Withdrawal Reason.
- If the *Remove* section is available, choose whether to keep or remove the course from your learning plan.

Note: The *Remove* option won't appear if your manager or the system administrator has set the course as required learning.

- Click Confirm
- 5. The *Information* dialogue box appears.

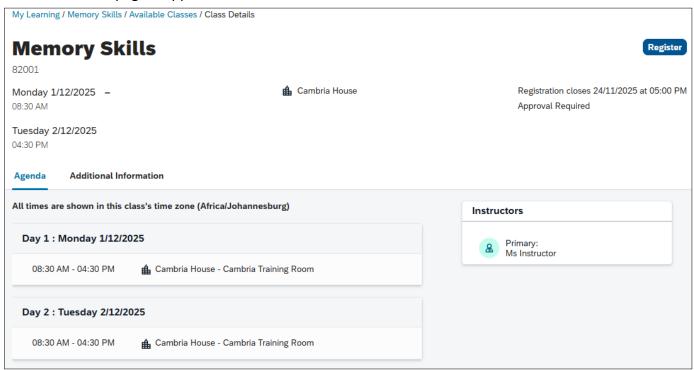




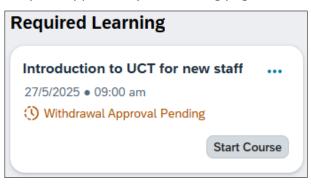
Click Ok.

Withdrawing from a class (continued)

6. The Class Details page reappears.

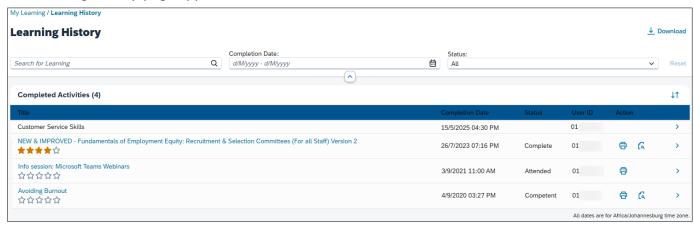


- Click My Learning (top left) to return to the Learning page.
- 7. The *Learning* page reappears. Depending on the withdrawal choices and course requirements, the course may still appear on your learning page.



Viewing learning history

- 1. Log in to SuccessFactors and access the Learning page.
 - Click Activities (top right) and choose Learning History.
- 2. The Learning History page appears.



- Use the search fields at the top of the page to search for a specific learning event.
- Click Download for a PDF version of the learning history.
- For courses with certificates, click 🗗 Print Certificate to view/print the certificate.
- For courses with online content, click Review Content to access the online course materials.
- Click My Learning to return to your Learning page.

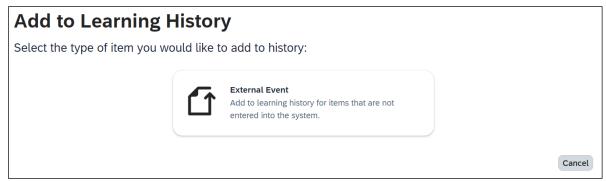
Recording external learning

Before you begin

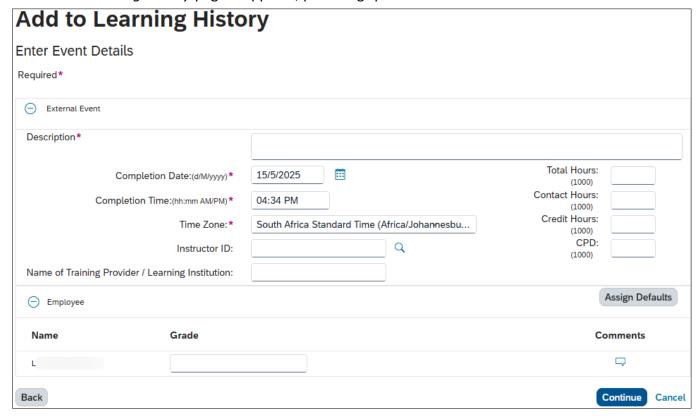
Attendance at external training/learning events outside of UCT can be added to SuccessFactors Learning and will appear in your *Learning History*. See also: <u>Viewing learning history</u>.

Procedure

- 1. Log in to SuccessFactors and access the Learning page.
 - Click Activities (top right) 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 was attended.
- 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.
- The *Employee* section displays your name. Enter a *Grade* and/or *Comments* if applicable.

- Click Continue

Recording external learning (continued)

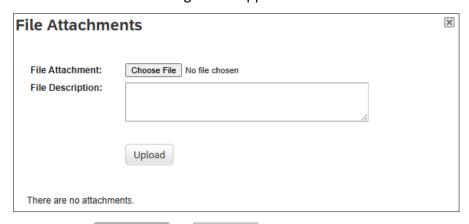
4. The Add to Learning History page reappears, to confirm learning details.



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



- If there are related documents to attach, click File Attachments (0). If there are no documents to attach, skip to step 6.
- The File Attachments dialogue box appears.

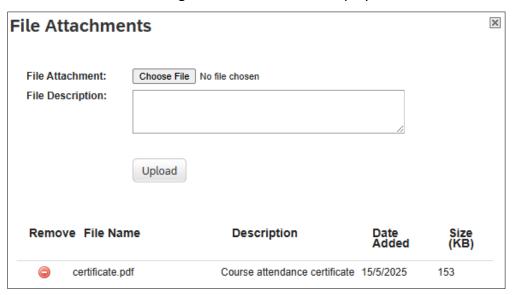


- Click Choose File or Browse... (button name may vary depending on the web browser you're using) to select the file on your computer. Note: There is a file upload size limit of 800 KB.
- Enter a File Description.

Click Upload

Recording external learning (continued)

• The File Attachments dialogue box refreshes and displays the attachment details.



- ullet Click lacksquare to close the *File Attachments* dialogue box.
- 6. The Add to Learning History dialogue box reappears, displaying the number of file attachments.
 - Click Close to return to the *My Learning* page. The recorded external learning appears in your *Learning History*, see: Viewing learning history.