UNIVERSITY OF CAPE TOWN
IYUNIVESITHI YASEKAPA • UNIVERSITEIT VAN KAAPSTAD

SuccessFactors Learning guide for Learning Administrators

Issued by UCT Human Resources
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Contents: SuccessFactors Learning guide for Learning Administrators

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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.

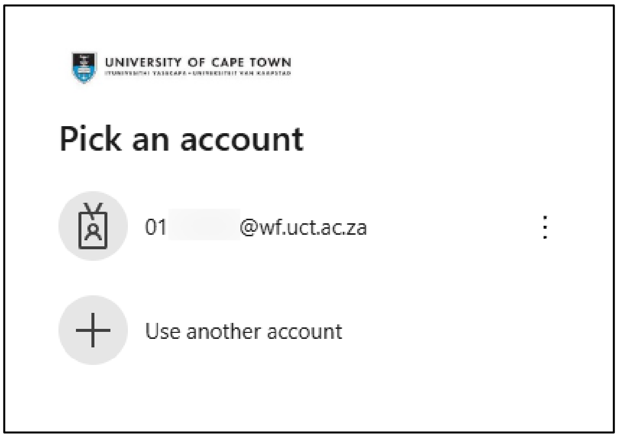
Support

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

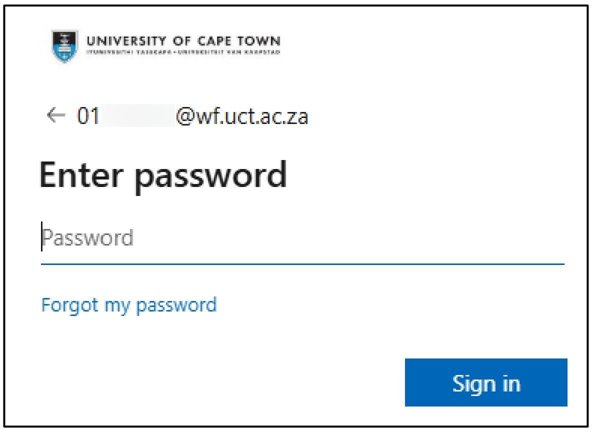
Procedure

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 the next page)



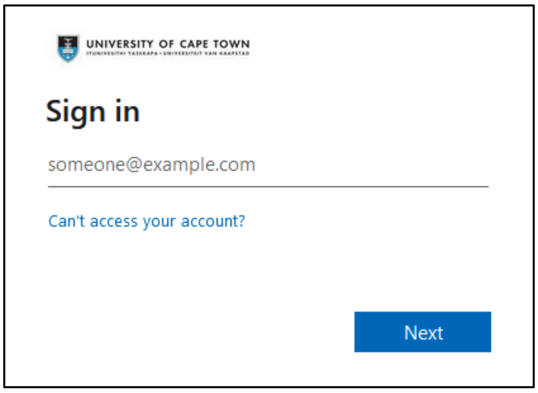
   - Select the appropriate account.



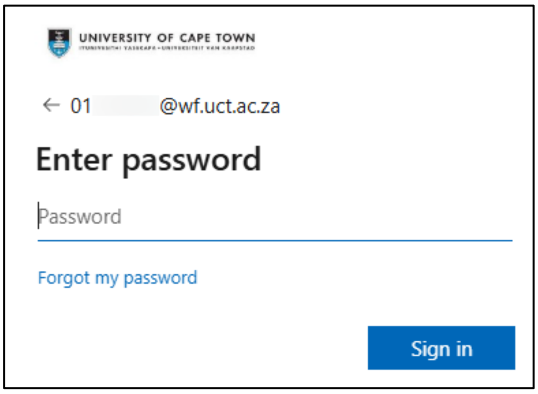
   - Enter your *Password* and click *Sign in*.
   - You will be prompted to verify your login either via Microsoft Authenticator or a code sent to your phone as an SMS. SuccessFactors will open (see step 4).

Logging in to SuccessFactors via a browser (continued)

New users

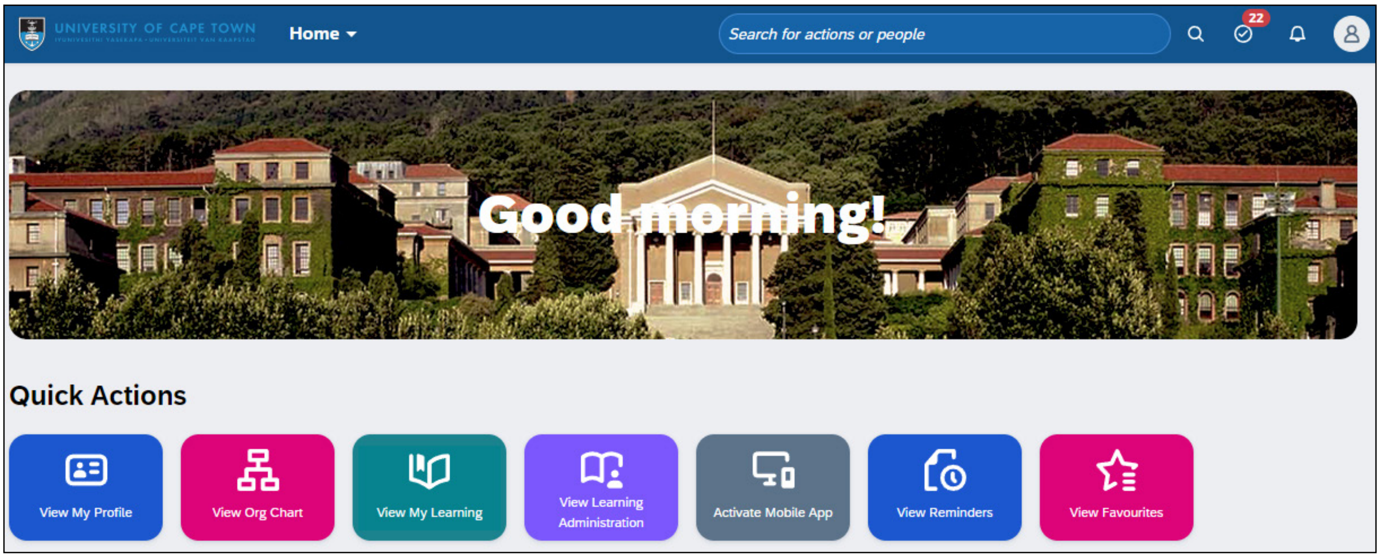


- In the field below *Sign in*, enter your UCT staff number followed by @wf.uct.ac.za. E.g. 01234567@wf.uct.ac.za. **Note**: UCT staff number only, third party "T" accounts will not work.
- Click *Next*.



- 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.

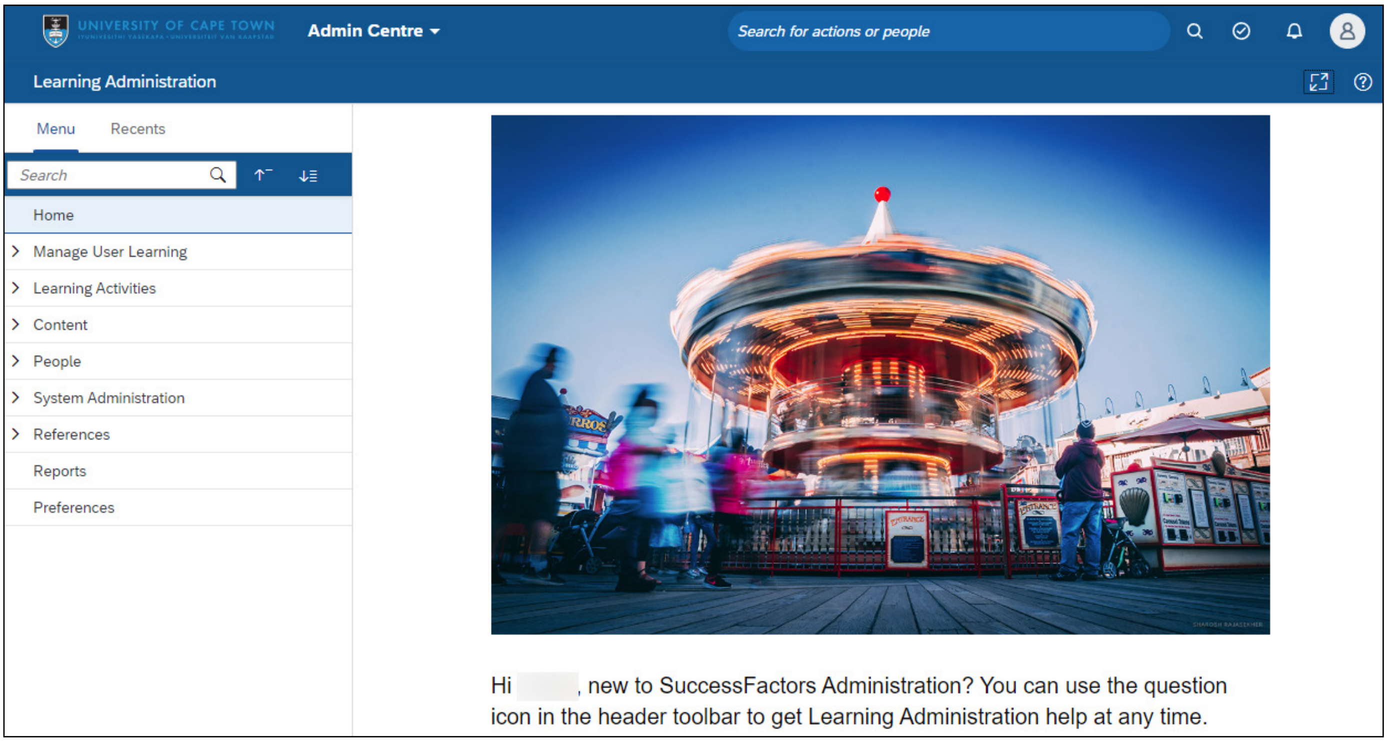
4. The *Home* page appears.



- Click the *View Learning Administration* tile.

Logging in to SuccessFactors via a browser (continued)

5. The *Learning Administration* page appears.



- Click *Recents* to show items (e.g. courses, information sessions) and classes you've recently accessed.

Creating a new item

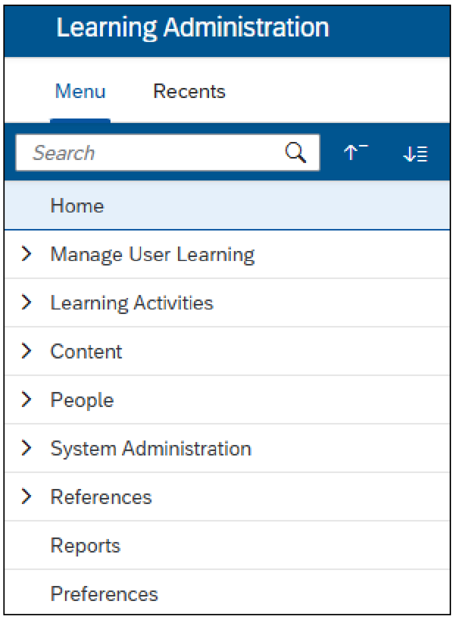
Background

An item is a term used to describe a training offering e.g. course, workshop, information session. A class is the scheduled date and time when the training offering will occur, learners can enrol/register on a class.

Items are the main building blocks of the SuccessFactors Learning system and have associated attributes that are set up or selected by the Learning Administrator.

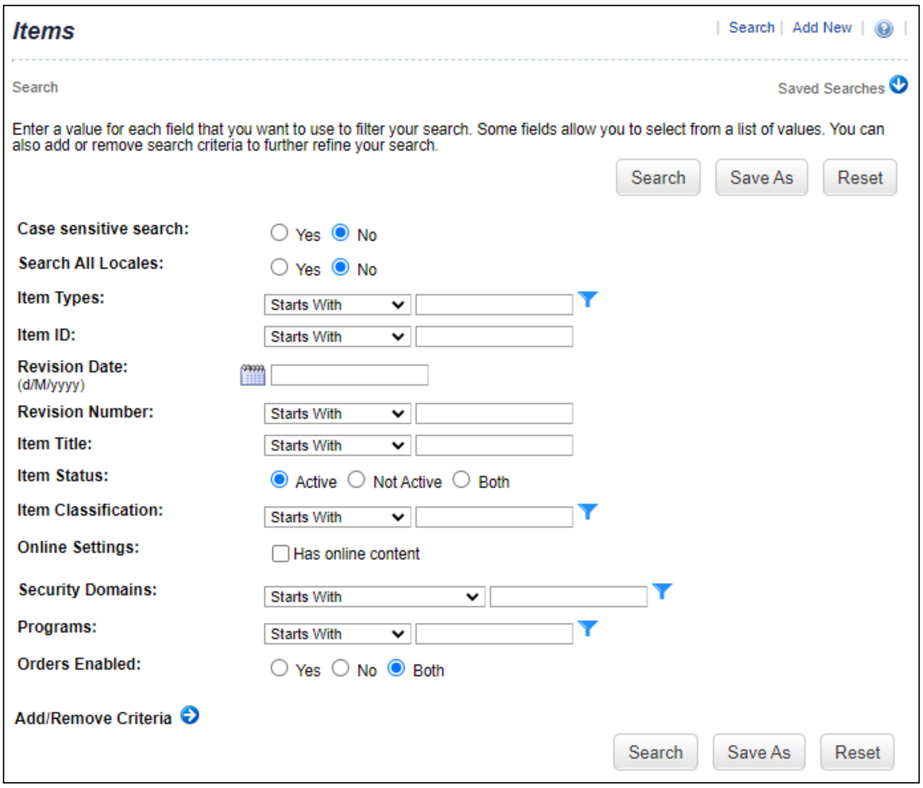
Procedure

1. [Log in to SuccessFactors and access the *Learning Administration* page](#).



- In the *Menu*, choose *Learning Activities* > *Items*.

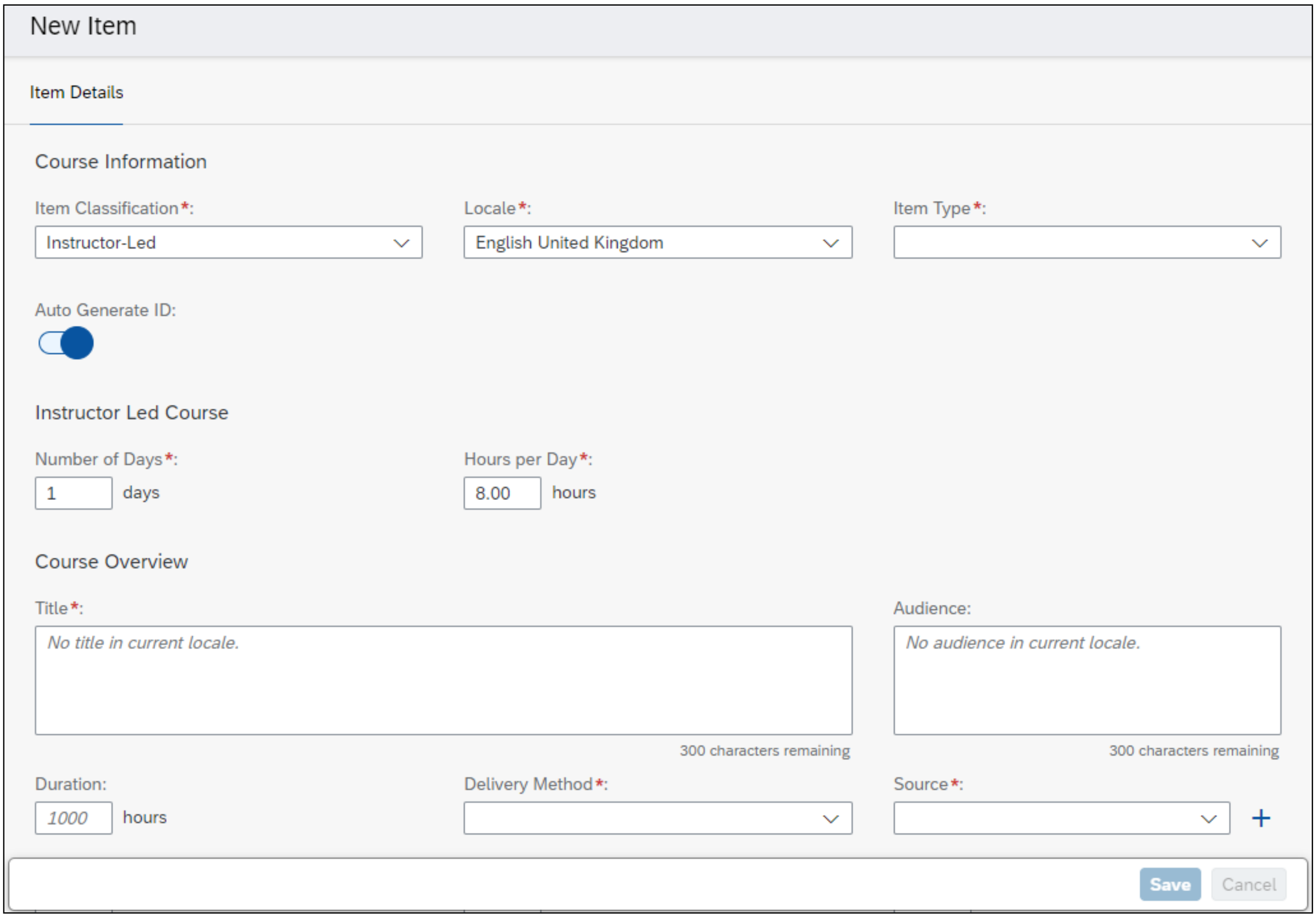
2. The *Items* page appears.



- Click Add New .

Creating a new item (continued)

3. The *New Item* page appears.

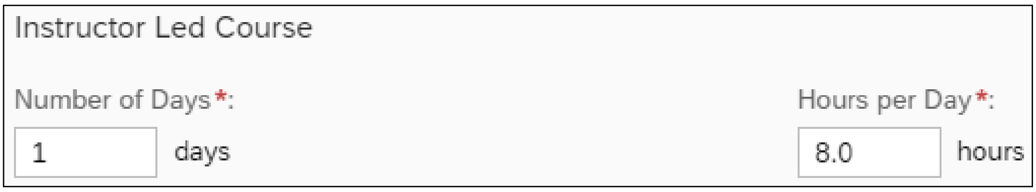


- Click *Enter Full Screen* to hide the left-hand menu. Click *Exit Full Screen* to show the menu.

In the *Course Information* section:
(consult the Learning Administrator – Item Fields Guide for more detail on the available selections)

- Select the appropriate *Item Classification* e.g. Instructor-Led.
- Ensure the *Locale* is *English United Kingdom*.
- Select the appropriate *Item Type* based on your requirements e.g. Course, Information Session.
- Ensure *Auto Generate ID* is selected to automatically generate the item identity number.

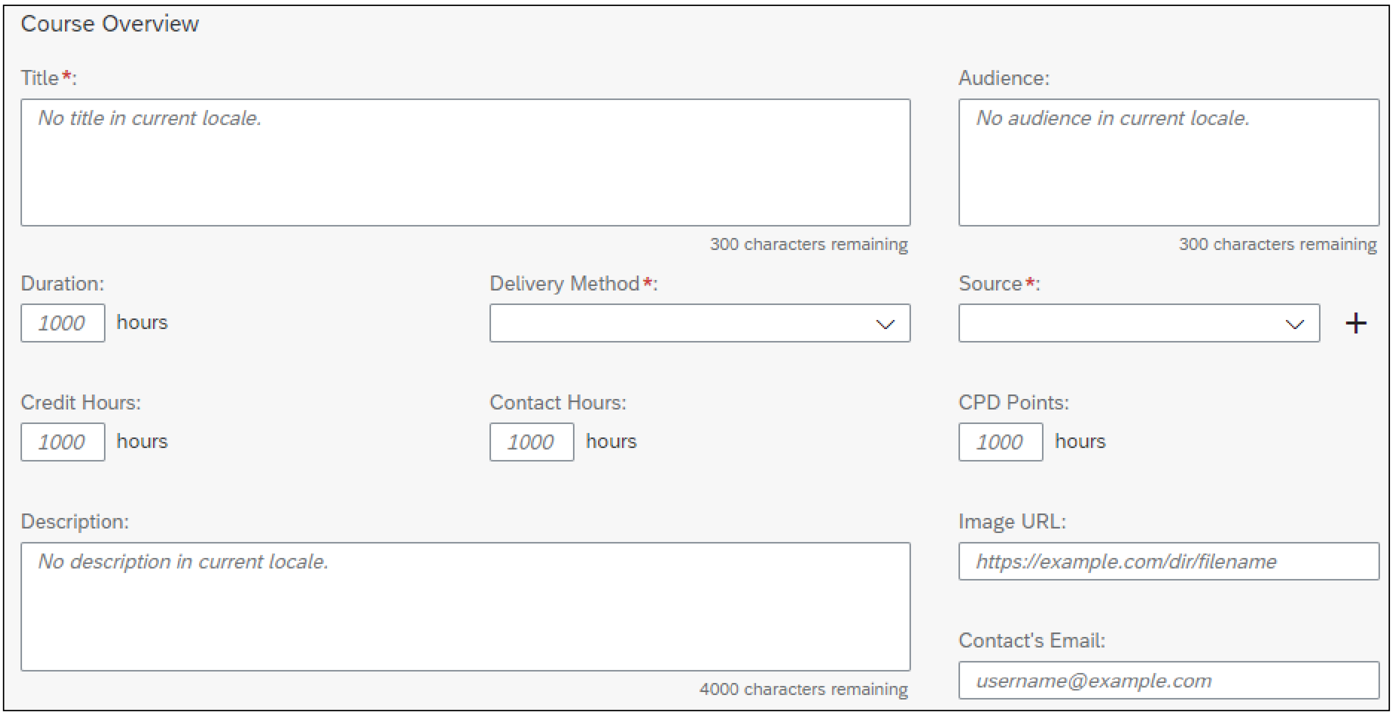
In the *Instructor Led Course* section (this section only appears for items classified as Instructor-Led):
(consult the Learning Administrator – Item Fields Guide for more detail on the available selections)



- Enter the *Number of Days*.
- Enter the *Hours per Day*.

Creating a new item (continued)

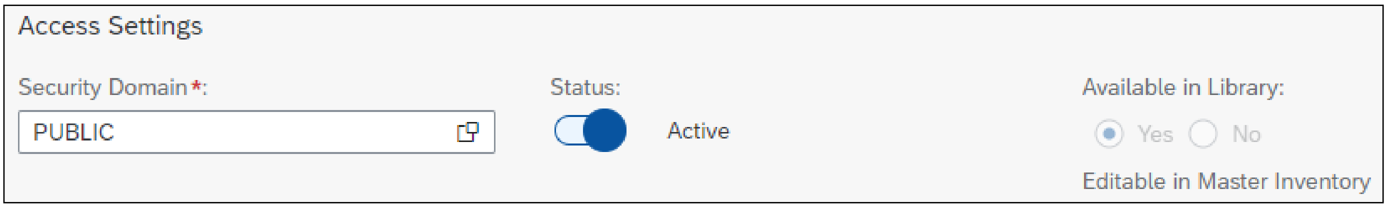
In the *Couse Overview* section:
(consult the Learning Administrator – Item Fields Guide for more detail on the available selections)



- Enter an appropriate *Title* for your item.
- Enter the total number of hours in the *Duration* field. If multiple days, add up the hours.
- Select the *Delivery Method* e.g. In-Person Facilitation (ILT), Virtual Facilitation (VIRT_WEB).
- Select the *Source* e.g. Internal (INT).
- If applicable, enter *Credit Hours*, *Contact Hours* or *CPD* (Continuing Professional Development) *Points*.
- Enter an appropriate *Description*. Formatting options for this text (e.g. bulleted lists, links) will be available after the item is saved.
- In the *Contact's Email* field, enter the relevant contact person's email address (or learning hub generic email address).

Creating a new item (continued)

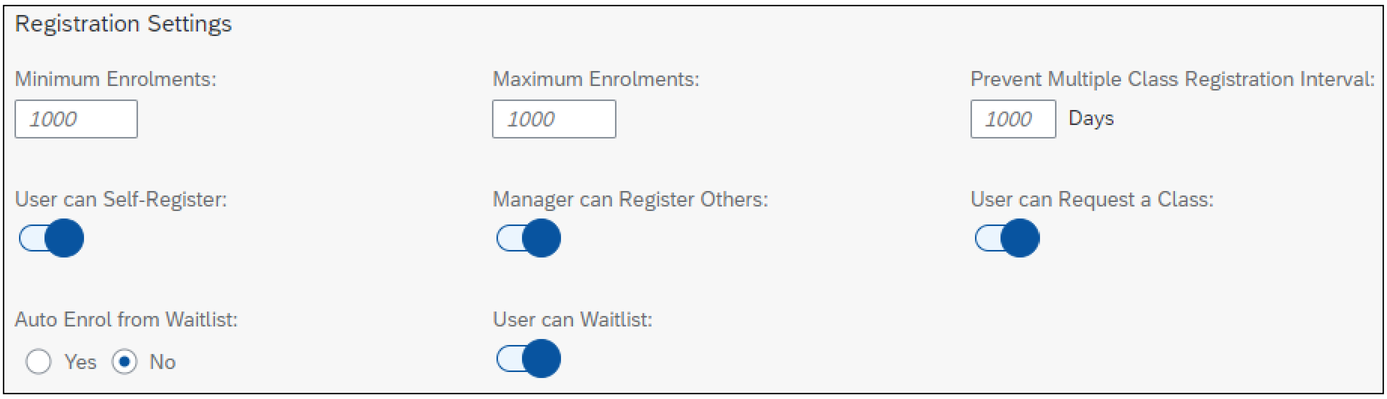
In the *Access Settings* section:
(consult the Learning Administrator – Item Fields Guide for more detail on the available selections)



- *Security Domain*: If this field is set to PUBLIC, any UCT Learning Administrator can manage the learning item. To change the security domain:
    - Click .
    - The *Security Domains* dialogue box appears.
    - Click Search to display a list of available security domains.
    - Select the area of the university responsible for the learning item.
- If the item should be hidden from learners, click the *Status* button to make the item inactive.

In the *Registration Settings* section:

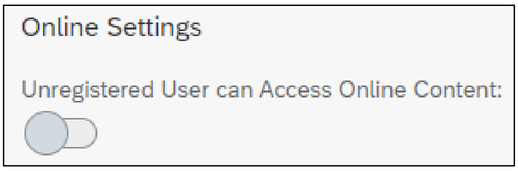
(consult the Learning Administrator – Item Fields Guide for more detail on the available selections)



- Enter the *Minimum Enrolments* and *Maximum Enrolments* to set the number of learners per class.
- To restrict learners from registering again for a course (item), enter the specified period in the *Prevent Multiple Class Registration Interval* field. E.g. 365 days for a 1-year restriction. **Note**: Learners must be cancelled from classes they didn't attend otherwise they will be unable to move to a different class for the same course if there is a registration interval. A learner, manager or Learning Administrator can cancel the registration.
- If learners should register themselves for a class, ensure *Users can Self-Register* is selected.
- If managers should register team members for a class, ensure *Manager can Register Others* is selected.
- If learners can submit a request for a class (indicating the date by when they would like to have completed the class and possibly a preferred location), ensure *User can Request a Class* is selected.
- If SuccessFactors should automatically add wait-listed learners to classes when space is available, select *Yes* for *Auto Enrol from Waitlist*. If this option is set to *No*, the Learning Administrator will have to manually move learners from the waitlist into a class.
- If learners should add themselves to a waitlist when a class is full (maximum enrolments reached), ensure *User can Waitlist* is selected.

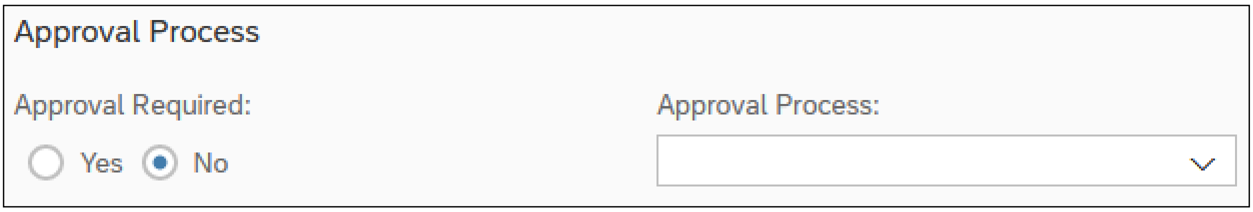
Creating a new item (continued)

In the *Online Settings* section:



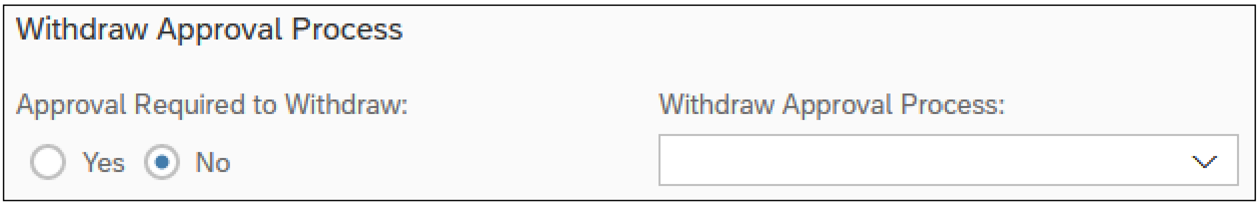
- The *Unregistered User can Access Online Content* default setting is off, preventing unregistered learners from accessing the learning item's online content, change the setting if appropriate.

In the *Approval Process* section:



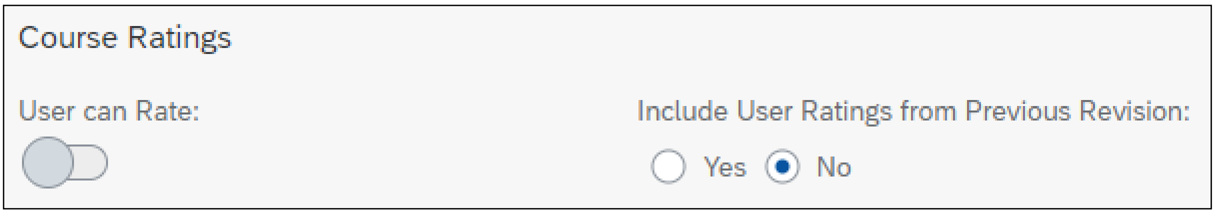
- By default, the option for manager approval is set to *No*.
- If the manager must approve learner registrations for a scheduled class:
    - Select *Yes* in the *Approval Required* field.
    - Select *Manager Approval* in the *Approval Process* field.

In the *Withdrawal Approval Process* section:



- By default, the option for manager approval on withdrawal is set to *No*.
- If the manager must approve learner withdrawals from a scheduled class:
    - Select *Yes* in the *Approval Required to Withdraw* field.
    - Select *Manager Approval* in the *Withdrawal Approval Process* field.

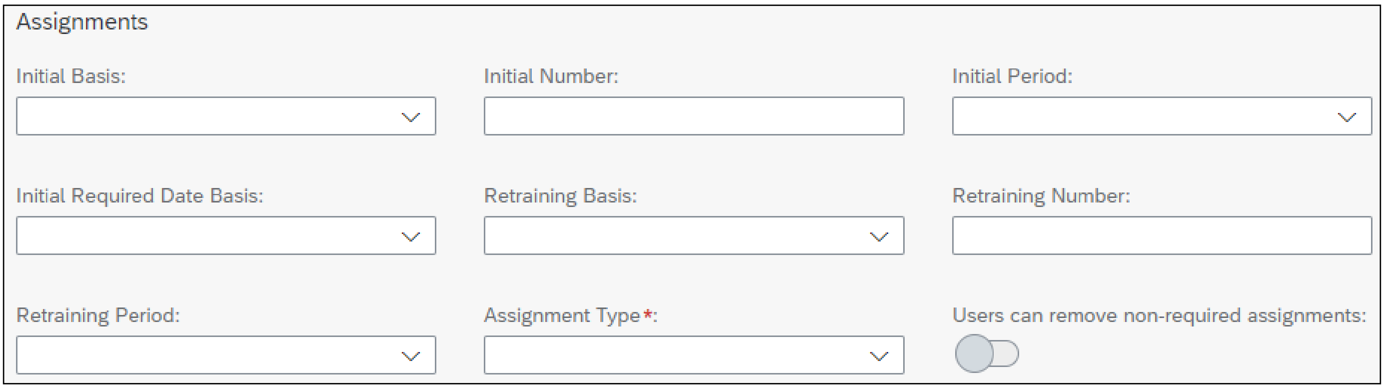
In the *Course Ratings* section:



- The *User can Rate* option allows learners who have completed a class to rate the learning item (e.g. course, information session) out of 5 stars. These ratings will be displayed in the course library. The default setting is off, change if appropriate.
- The *Include User Ratings from Previous Revision* option will include user ratings of previous item versions when calculating all user ratings. If the item has significant revisions, this option is not recommended and should be set to *No* to aid the comparison of user ratings for each version.

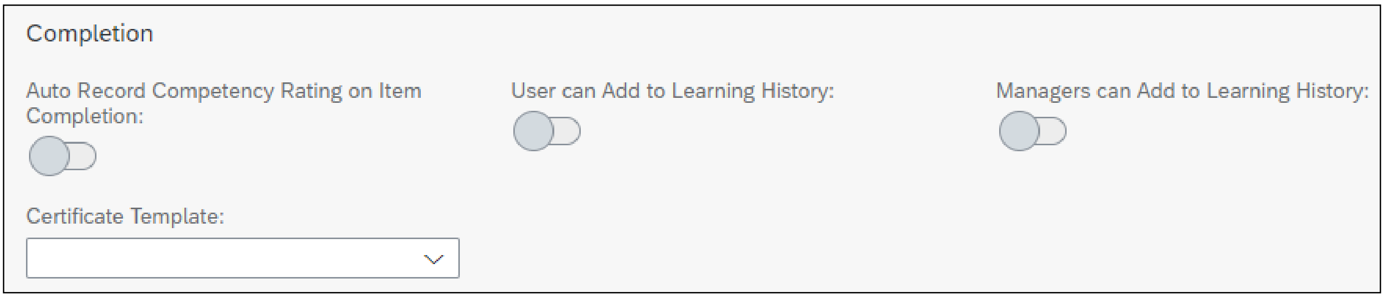
Creating a new item (continued)

In the *Assignments* section:



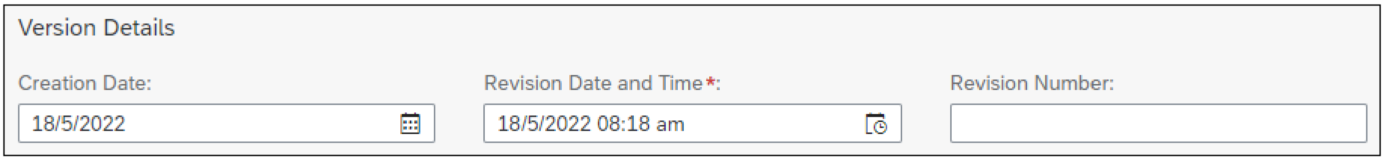
- The *Initial Basis, Initial Number, Initial Period* and *Initial Required Date Basis* fields are used to set a **due-by-date rule** for the item e.g. the learner will have 1 year from date of item assignment to complete the item before it becomes overdue. Consult the Learning Administrator – Item Fields Guide for assistance with using these fields.
- The *Retraining Basis, Retraining Number* and *Retraining Period* fields are used to set up a **retraining period rule** for the item e.g. item must be completed on an annual basis. Consult the Learning Administrator – Item Fields Guide for assistance with using these fields.
- Select the appropriate *Assignment Type* e.g. Optional (OPT), Compliance (COMP). Consult the Learning Administrator – Item Fields Guide for assistance with using this field.
- The *Users can remove non-required assignments* field allows Learning Administrators to choose whether learners are permitted to remove optional/recommended items assigned by a Learning Administrator. Consult the Learning Administrator – Item Fields Guide for assistance with using this field.

In the *Completion* section:



- Do not change the *Auto Record Competency Rating on Item Completion*, *User can Add to Learning History* and *Manager can Add to Learning History* fields as these are not in use at UCT.
- Select a certificate in the *Certificate Template* field e.g. UCT certificate of attendance, UCT certificate of completion. **Note**: The UCT certificate of completion should only be used when the learner completes a task/s such as a test, presentation, or submission of work.

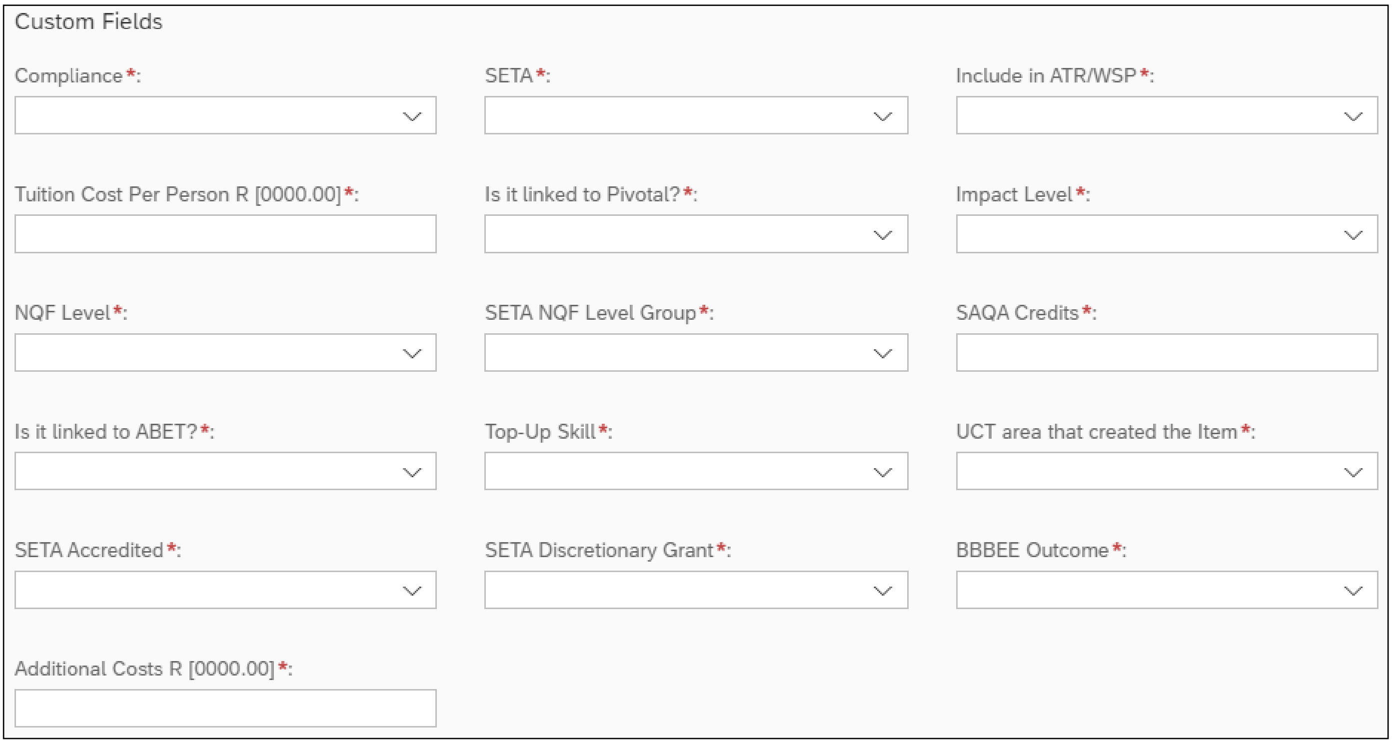
In the *Version Details* section:



- Do not change any fields as these are automatically generated by SuccessFactors.

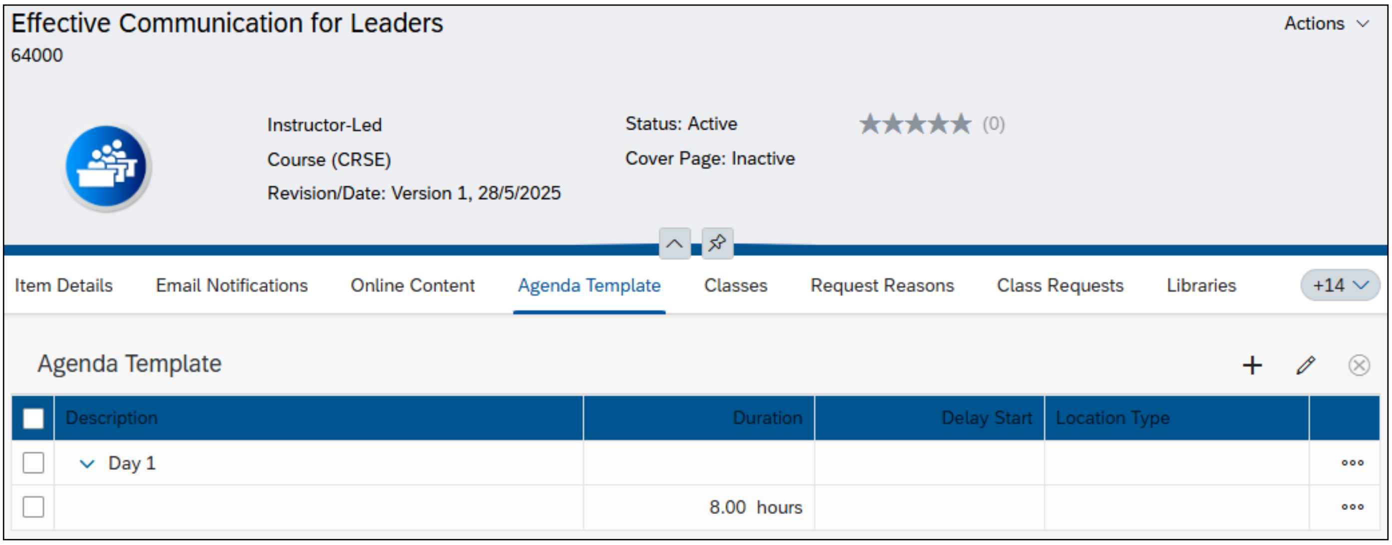
Creating a new item (continued)

In the *Custom Fields* section:



- All fields in this section are mandatory (indicated on screen by a red asterisk) and must be completed. Consult the Learning Administrator – Item Fields Guide for assistance with selections.
- Click Save. A message indicates that the changes were saved.

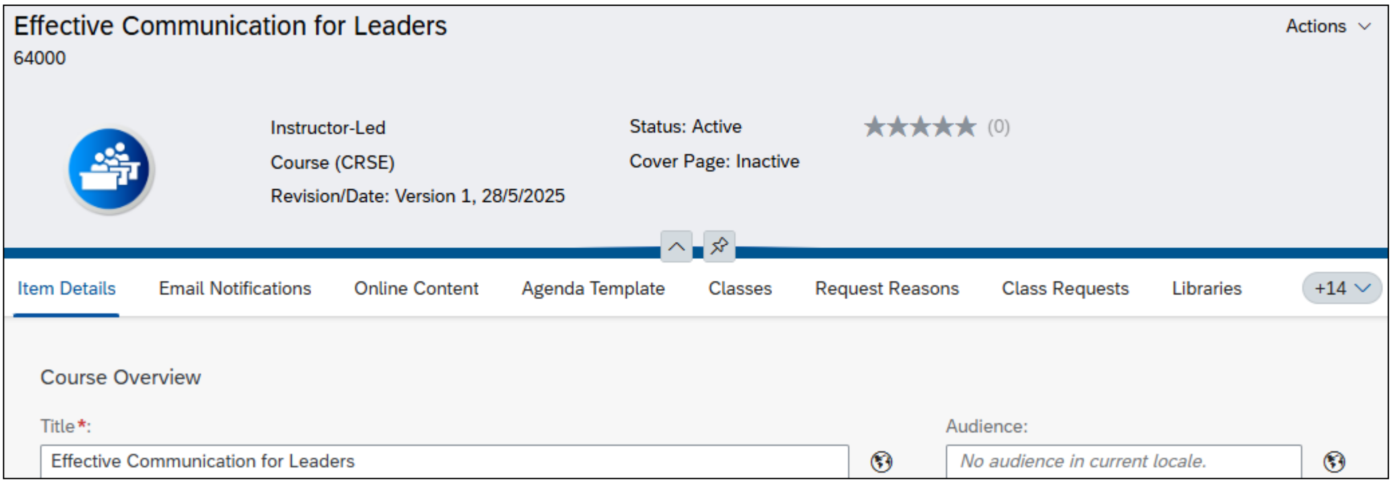
4. If the item is instructor-led, the *Agenda Template* page appears.



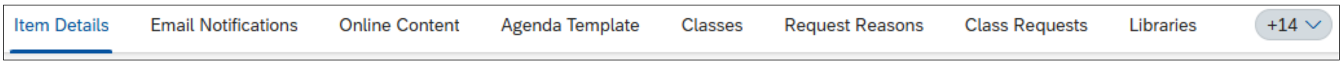
- To change the agenda template, see: Working with the agenda template. This includes setting patterns for classes that run on non-consecutive days.

Creating a new item (continued)

5. Navigate through the new item using the features mentioned below.



- To hide the item header details, click *Collapse Header*.
- To pin the item header details (always displayed, even when scrolling down the page), click *Pin Header*.
- The item menu appears below the item header, providing shortcuts to the pages that can be used when setting up the item. The arrow +14 at the far right displays a dropdown list of menu items not currently visible e.g. *Surveys*, *Prerequisites*.



- Click *Item Details* to review or change item settings and details. The item *Description* can be edited (e.g. adding bulleted lists) by clicking *Translate*. See: Editing an item description.
- Refer to the table below for additional settings to consider for the new learning item:

If ...	Then...
the learning item should appear in the **course library**	The learning item must be associated with a library (a set of learning items grouped for a specific audience e.g. all staff, all managers). See: Working with libraries
the learning item should be included in one or more **categories** in the course library	The learning item must be associated with one of the predefined categories (a group of related learning items in the course library). See: Working with categories
there is another learning item that is a **prerequisite** for the current item	Link all items (courses) that must be completed before a learner can register on the current learning item. See: Working with prerequisites
there are preferred or **authorised instructors** for the learning item	The instructor(s) must be connected to the item. See: Adding an authorised instructor to an item
there is a need to collect **feedback** (e.g. **course evaluations**) for the learning item	The learning item must be linked to a new or existing survey. Surveys are used to gather learner (and manager) feedback on completed training sessions and are linked to the item. See: Working with surveys

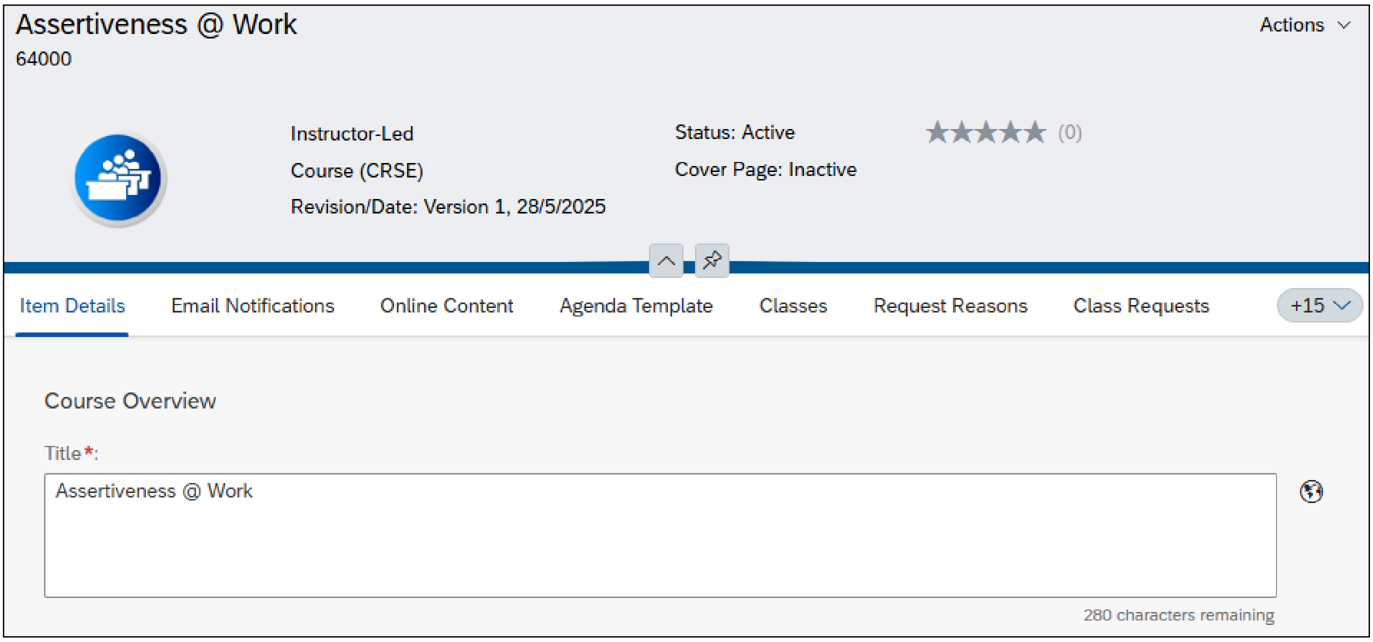
Editing an item description

Background

The item description can be edited to include bulleted lists, links to websites, and text can be formatted (bold, italics).

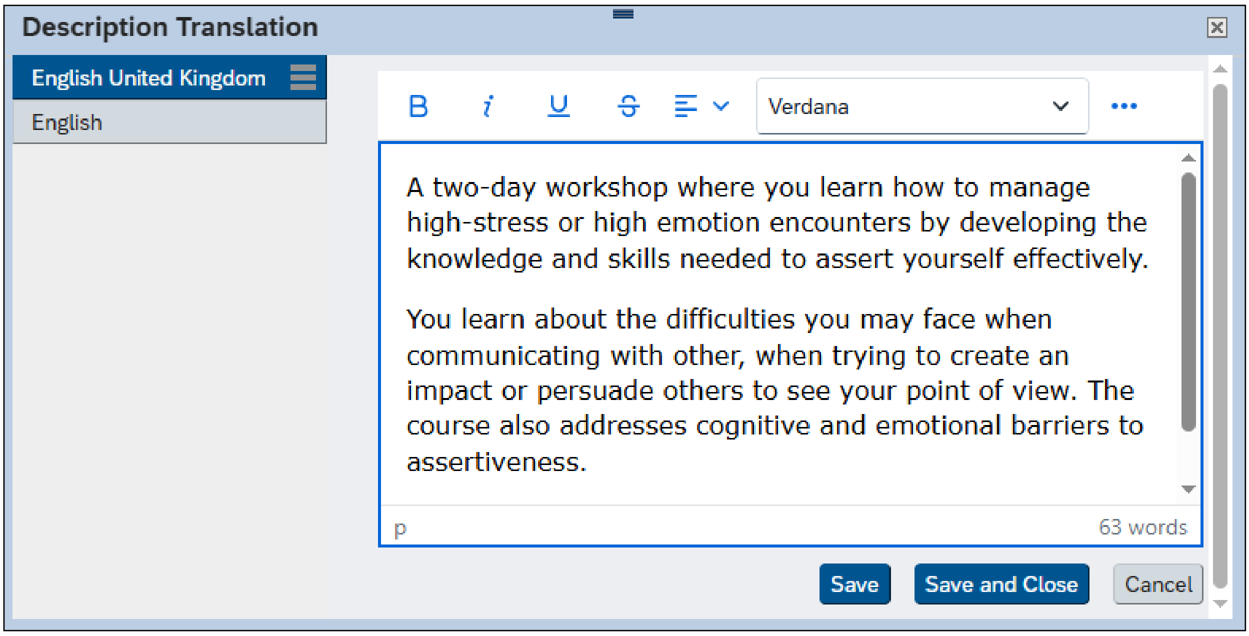
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate learning item.



- If not already selected, click **Item Details**.
- Next to the item *Description*, click *Translate*.

3. The *Description Translation* dialogue box appears.



- To format text, select the text and use the *Bold*, *Italic* or *Underline* buttons.
- Click *Additional Options* to access options such as bulleted or numbered lists, links and tables.
- Click **Save and Close**.

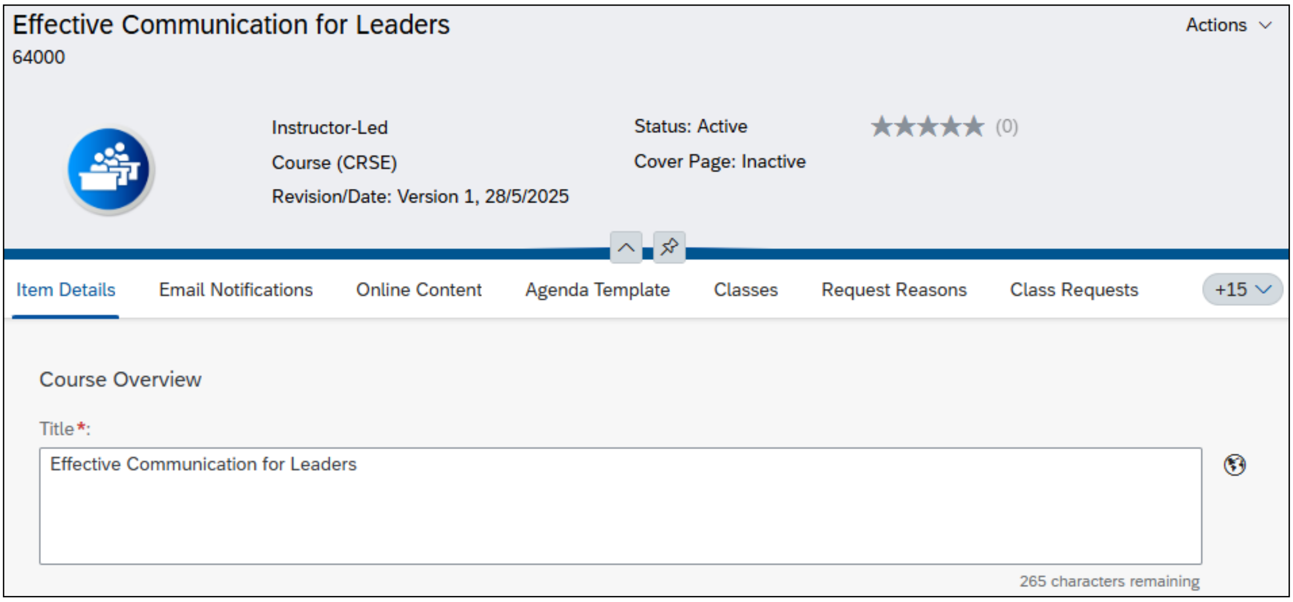
Items: Working with the agenda template

Background

The agenda template is used for instructor-led learning items, to determine the number of days and timeslots for scheduled classes.

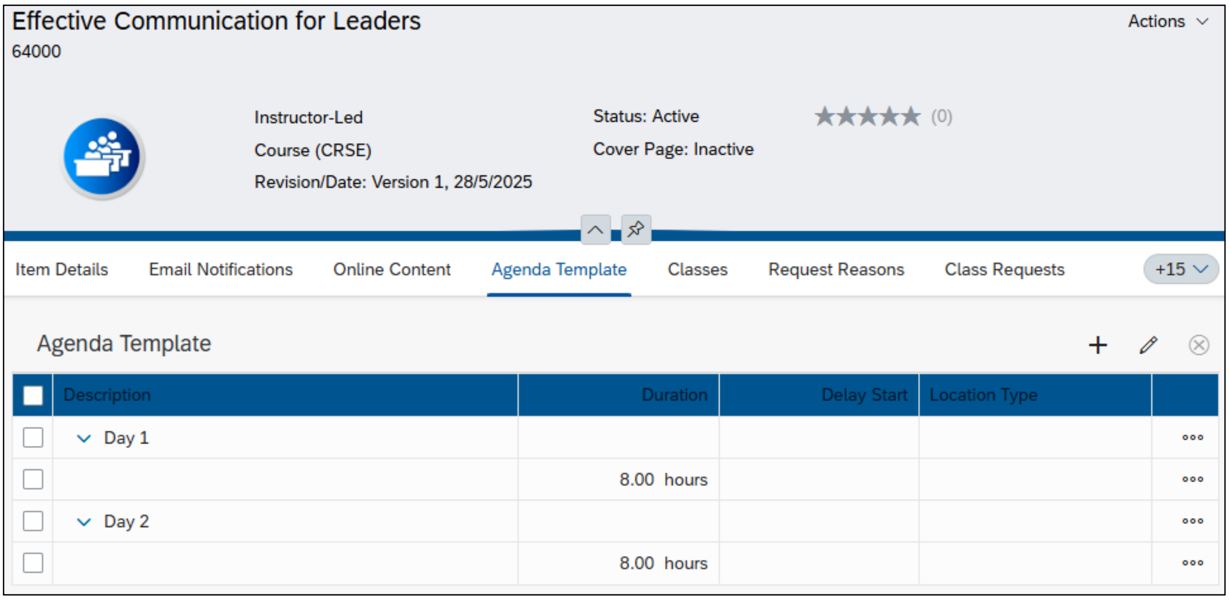
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate learning item.



- In the item menu, click *Agenda Template*.

3. The *Agenda Template* page appears.



- There are a number of options when working with the *Agenda Template*:

  Adding a new day (includes setting a pattern for items with non-consecutive days)

  Splitting a day into multiple sessions

  Copying a day

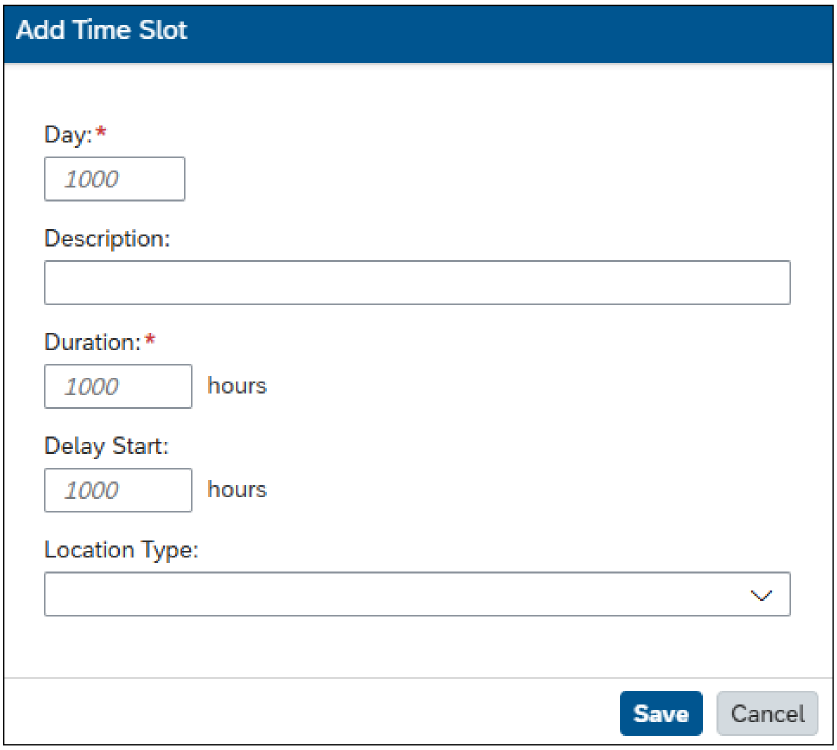
  Changing a day

  Deleting a day

Items: Working with the agenda template (continued)

Adding a new day

- Click + *Add Time Slot*.
- The *Add Time Slot* dialogue box appears.



- Enter the *Day* number for your item. The *Day* field determines the pattern of your classes. When the class is created at a later stage, the day pattern is applied from the chosen start date.

  Example: A class pattern of 3 consecutive days will be set up with Day 1, Day 2 and Day 3.

Description	Duration
Day 1	
	8.00 hours
Day 2	
	8.00 hours
Day 3	
	8.00 hours

  Example: A class pattern of 3 days but a day apart will be set up with Day 1, Day 3 and Day 5.

Description	Duration
Day 1	
	8.00 hours
Day 3	
	8.00 hours
Day 5	
	4.00 hours

Items: Working with the agenda template (continued)

Example: A class pattern of once a week on the same day for 3 weeks will be set up with Day 1, Day 8 and Day 15.

Description	Duration
Day 1	
	7.50 hours
Day 8	
	7.50 hours
Day 15	
	7.50 hours

- If applicable, enter a *Description* for the day.
- Enter the *Duration* of the day in hours. E.g. 7.50 or 8 hours for a full day, 3.50 or 4 hours for a half-day. When later creating the class, the start and end time for the half day can be changed to reflect when in the day the half-day session occurs.
- Click Save. A message indicates that the changes were saved.
- Repeat the steps above to add any additional days to the *Agenda Template*.

Agenda Template

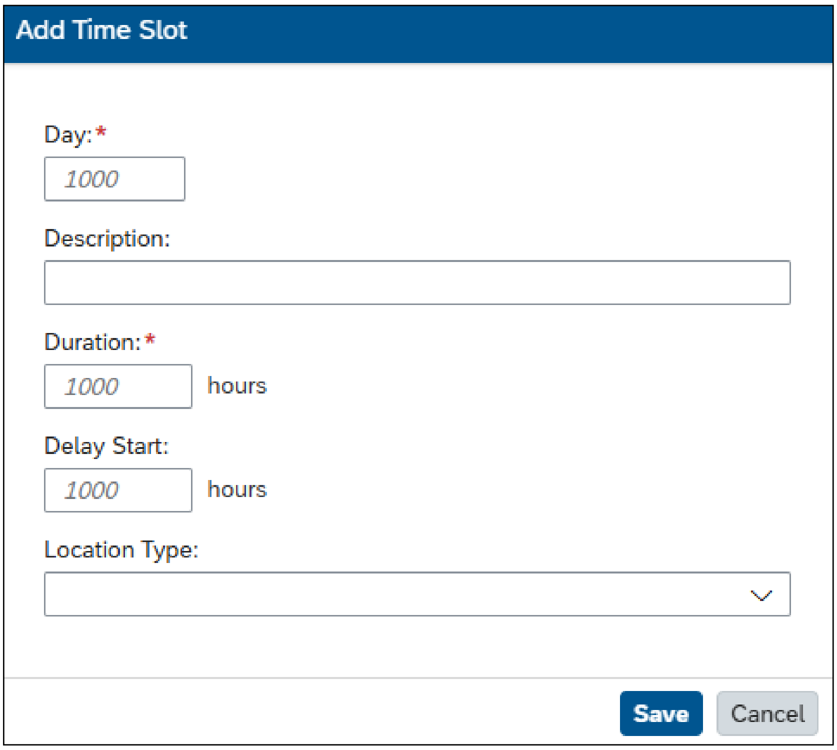
	Description	Duration
	Day 1	
	Understanding the leadership behaviours that are critical for success	7.50 hours
	Day 3	
	Increasing self-awareness, influence and impact	7.50 hours

Items: Working with the agenda template (continued)

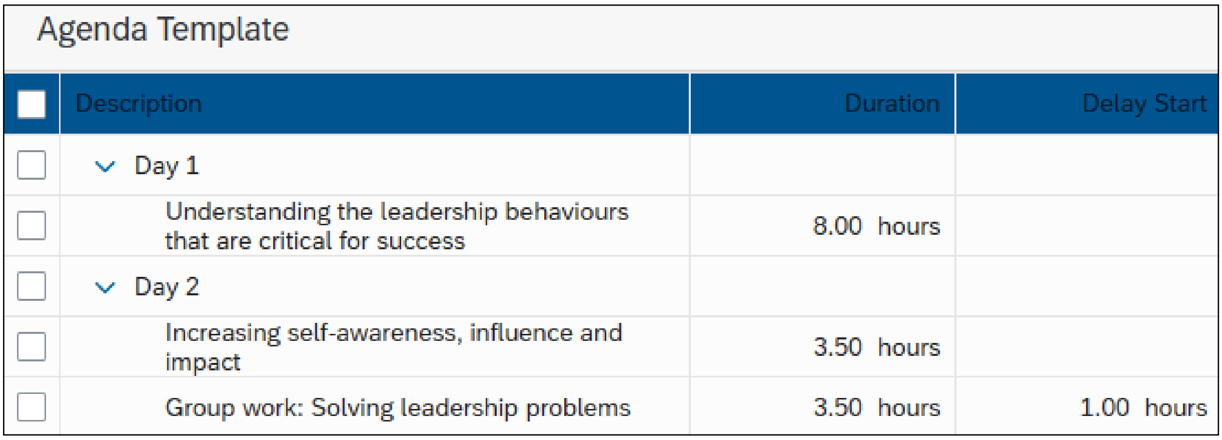
Splitting a day into multiple sessions

Some days may require multiple sessions due to a venue or instructor change during the day.

- Click + *Add Time Slot*.
- The *Add Time Slot* dialogue box appears.



- Enter the *Day* number.
- If applicable, enter a *Description* to identify the session.
- Enter the *Duration* of the session in hours e.g. 3.5 hours.
- If the session requires a delayed start after a previous session, enter the number of hours in the *Delay Start* field. E.g. A 1 hour delay start for the afternoon session allows for a lunch break between morning and afternoon sessions.
- Click Save. A message indicates that the changes were saved.
- Repeat the steps above to create any additional sessions for the day, ensuring that you use the same *Day* number (e.g. 2) to indicate that the sessions occur on the same day.



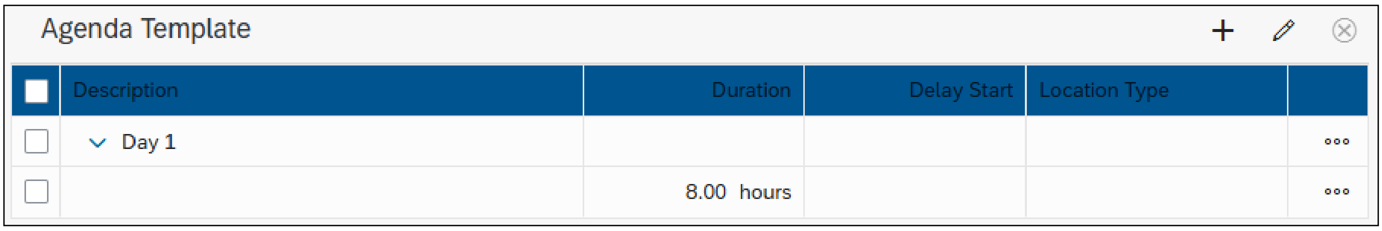
Agenda Template

Description	Duration	Delay Start
Day 1		
Understanding the leadership behaviours that are critical for success	8.00 hours	
Day 2		
Increasing self-awareness, influence and impact	3.50 hours	
Group work: Solving leadership problems	3.50 hours	1.00 hours

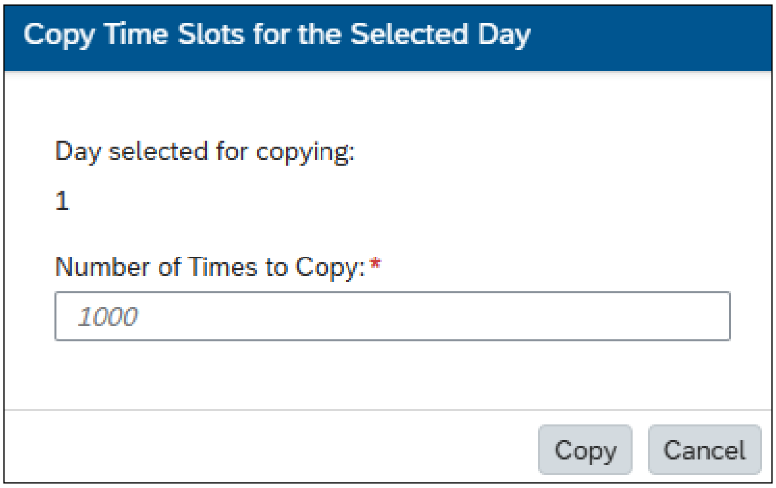
Items: Working with the agenda template (continued)

Copying a day

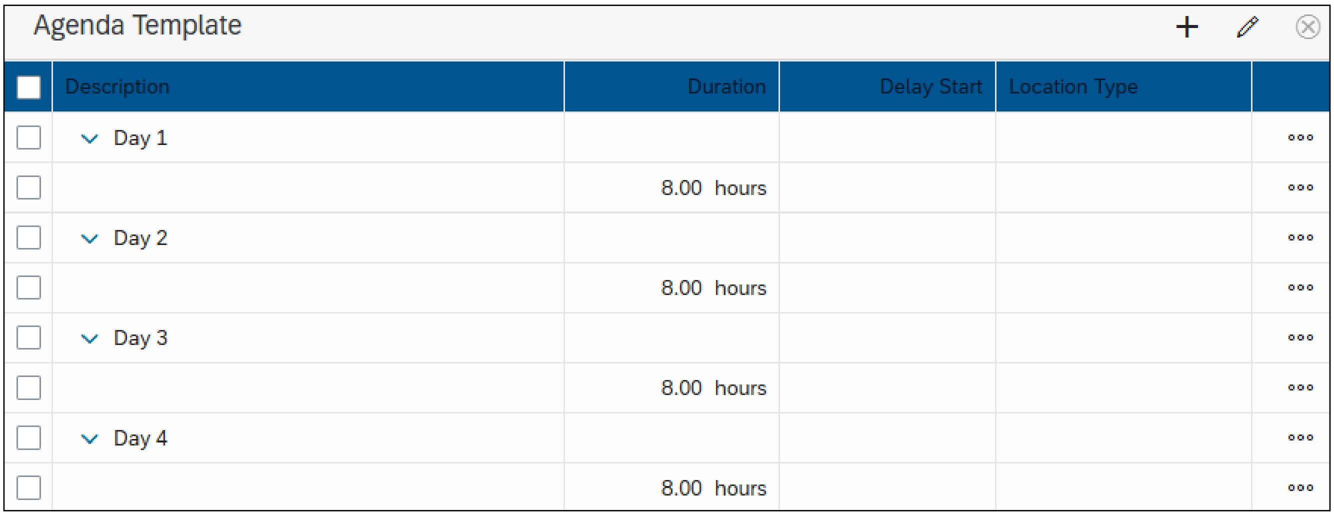
This procedure will create duplicate consecutive days. If a more complex day pattern is required, see: Adding a new day.



- Click ◦◦◦ *Additional Options* alongside the appropriate day and choose *Copy Time Slots* from the dropdown menu.
- The *Copy Time Slots for the Selected Day* dialogue box appears.



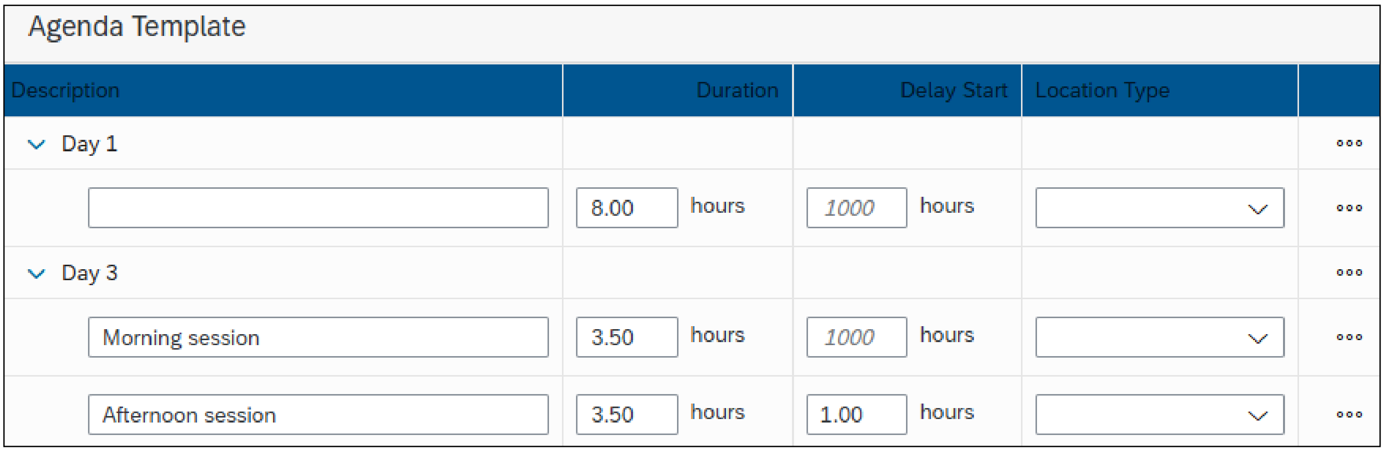
- Enter the *Number of Times to Copy*. E.g. 3 will create three copies of the selected day.
- Click Copy. A message indicates that the changes were saved.
- The *Agenda Template* page reappears, displaying the new, copied days.



Items: Working with the agenda template (continued)

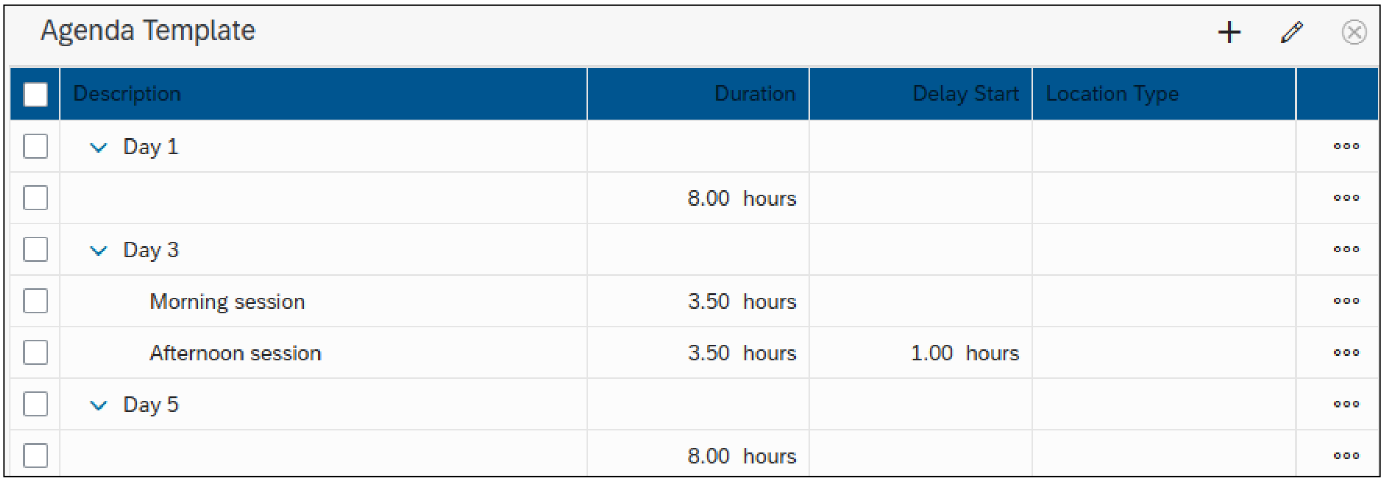
Changing a day

- Click *Edit*.



- Make the necessary changes to any of the available fields e.g. enter a description below the day, change the hours in the *Duration* column, enter a *Delay Start* for multiple sessions.
- Click Save. A message indicates the changes were saved.

Deleting a day



- Select the check box alongside the day number and click *Remove*. A message indicates that the entity was removed.

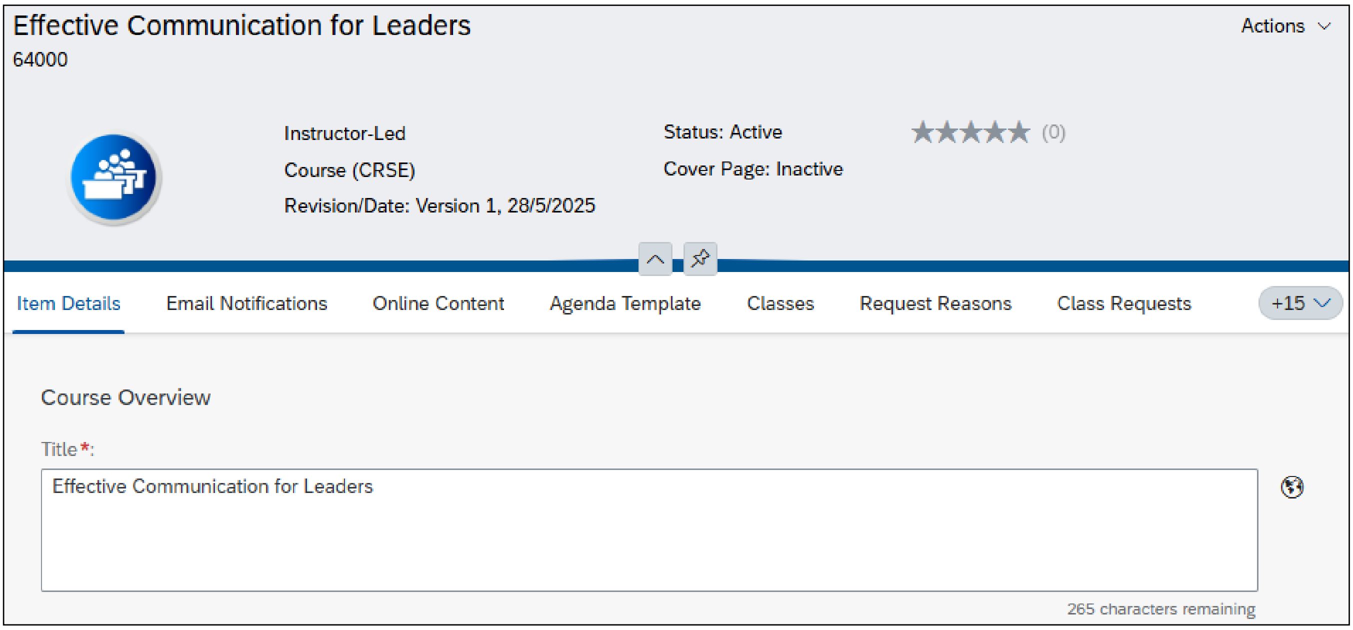
Items: Working with libraries

Background

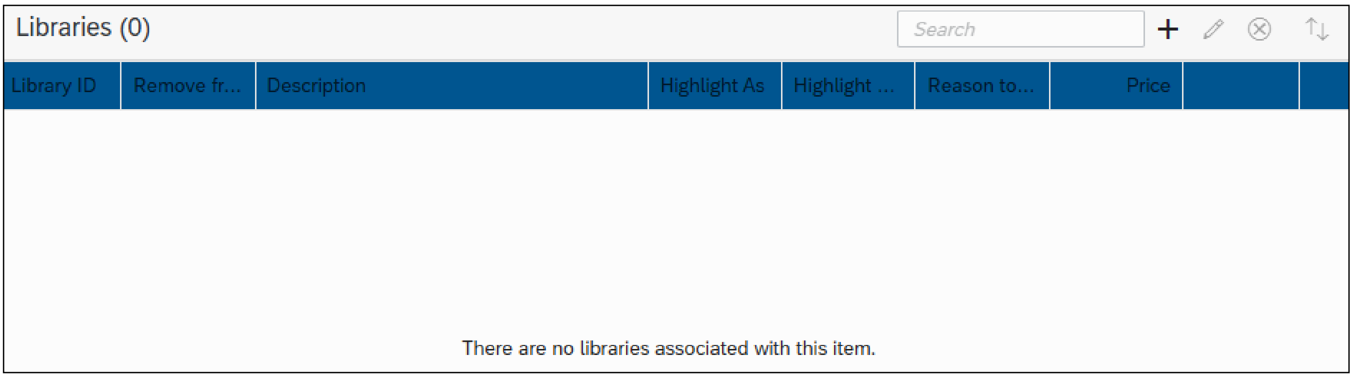
Libraries are a set of learning items (e.g. courses, workshops) grouped for a specific audience. Learners see what appears to be a single library of items but may be viewing items from multiple libraries based on their role. For example, a learner who is a line manager would see items from the *All UCT Staff* library as well as the *All Line Managers* library.

Procedure

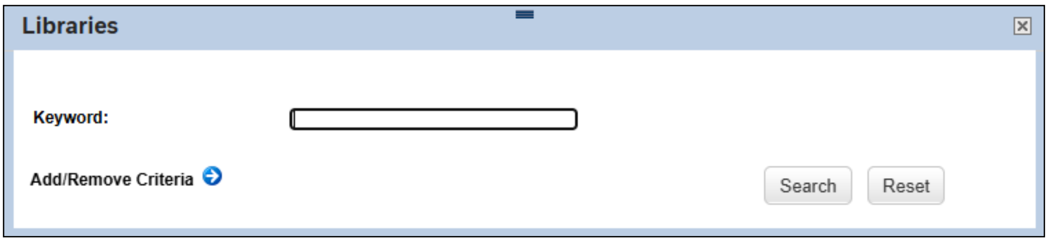
1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate learning item.



   - In the item menu, click *Libraries* or select it from the dropdown menu on the right.
3. The *Libraries* page appears. To change an existing library association, skip to step 6.



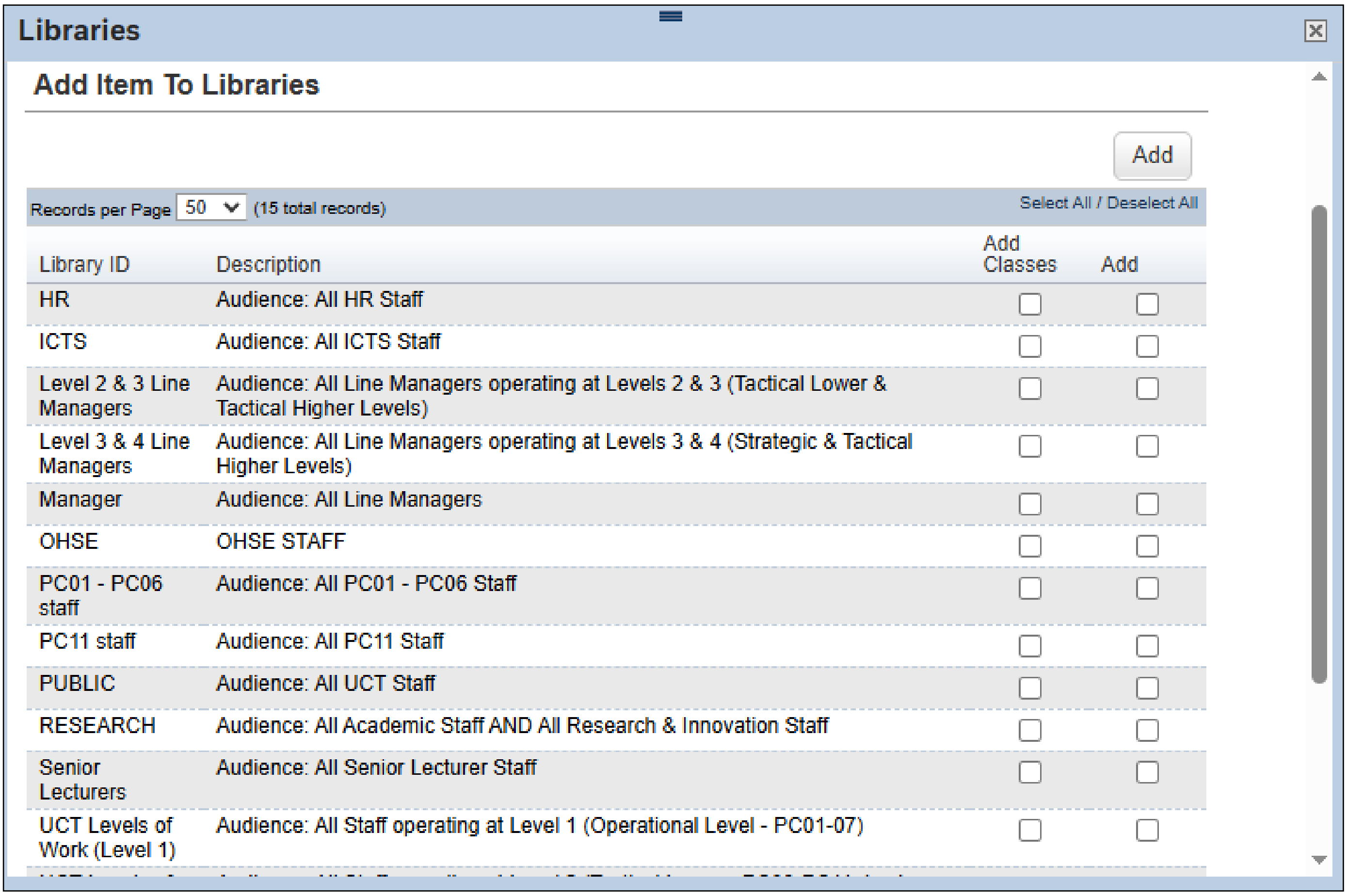
   - Click + *Add Libraries*.
4. The *Libraries* dialogue box appears.



   - Click Search to display all available libraries.

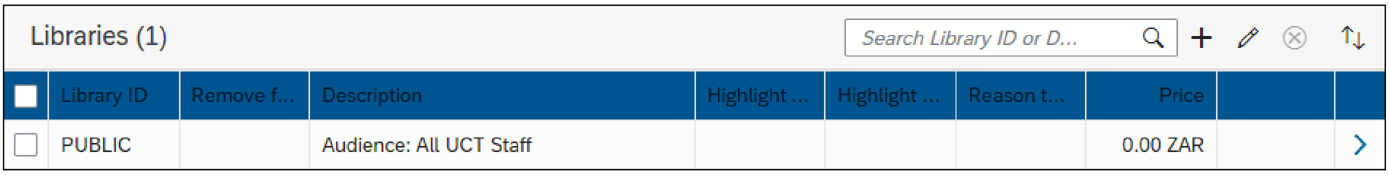
Items: Working with libraries (continued)

5. The *Libraries - Add Item to Libraries* dialogue box appears.



- Choose one or more libraries by selecting both check boxes in the *Add Classes* and *Add* columns alongside the appropriate library name. Selecting the *Add Classes* check box ensures that any classes connected to this item will automatically appear in the library.
  Note: If choosing the *PUBLIC* library, no other library should be selected as the *PUBLIC* library ensures the item is visible to all UCT staff.
- Click Add.

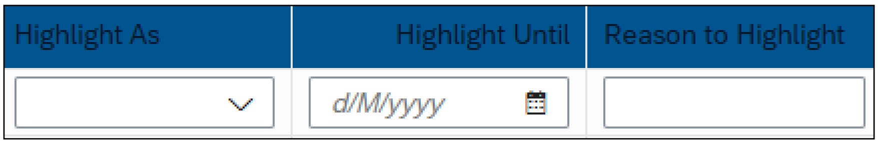
6. The *Libraries* page appears, displaying the current library associations.



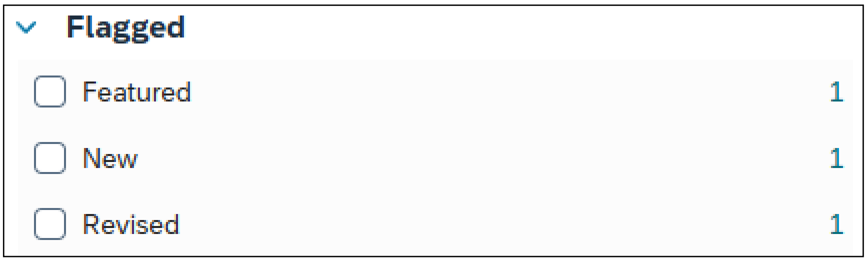
- To remove a library association, select the check box alongside the library name and click *Remove*. A message indicates that the row was removed.
- The *Highlight* fields can be used to add a tag to learning items indicating that an item is new, revised or featured. This tag will show in the item information when a learner searches in the course library and the learning item will appear in the *Featured* tile on the *My Learning* page.
  To add *Highlight* information, click *Edit*.

Items: Working with libraries (continued)

- The *Highlight* fields are now available for editing.



- In the *Highlight As* field, select *Revised*, *New* or *Featured*.
- In the *Highlight Until* field, select the appropriate end date.
- If appropriate, enter a *Reason to Highlight*.
- Click Save. A message indicates that the changes were saved.
- Courses with highlights (Features/New/Revised) can be identified using the filters on the left side of the course library search results page.



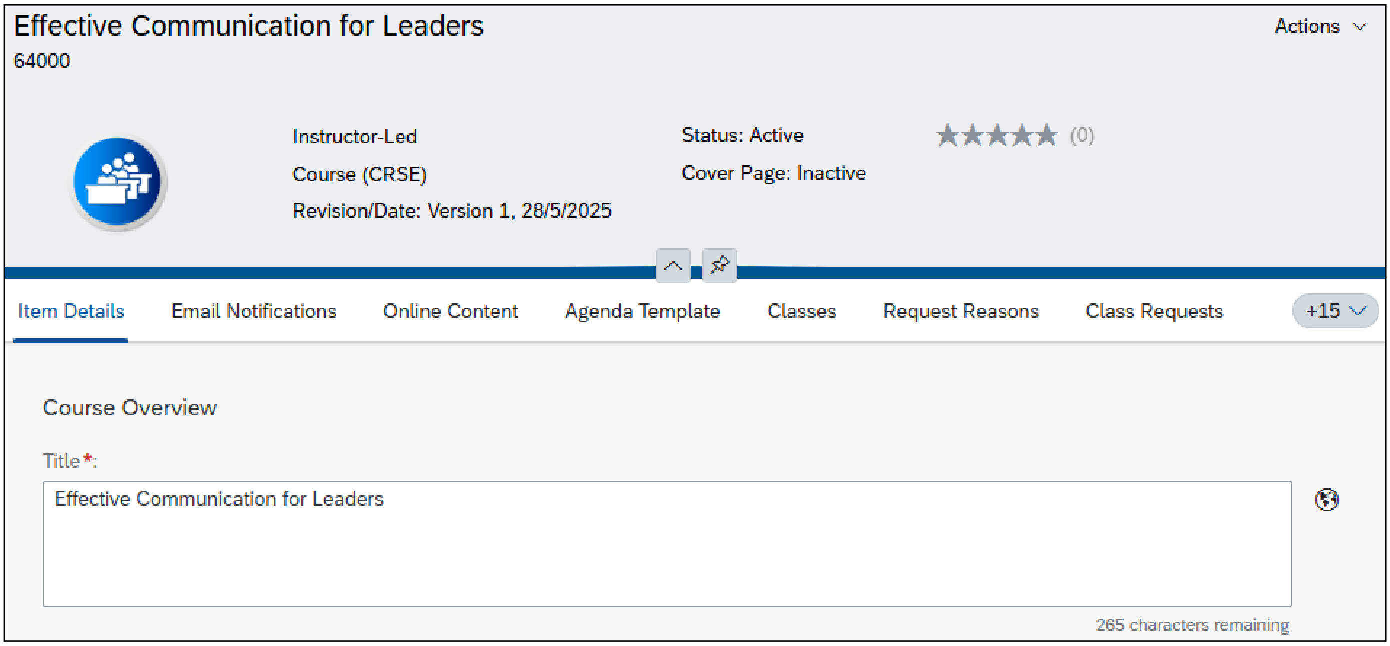
Items: Working with categories

Background

A category is a group of related learning items in the course library e.g. communication courses, institutional knowledge courses, information technology courses.

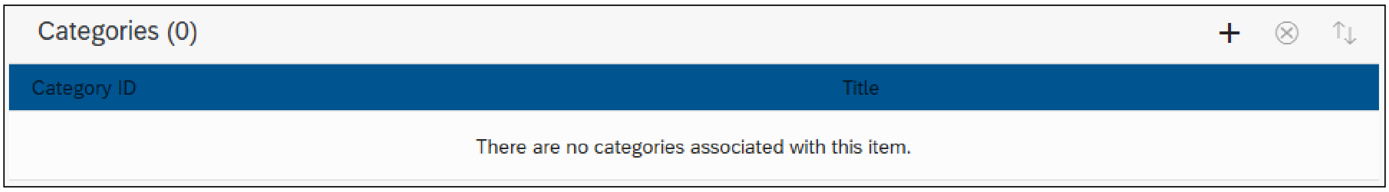
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate learning item.



- In the item menu, click *Categories* or select it from the dropdown menu on the right.

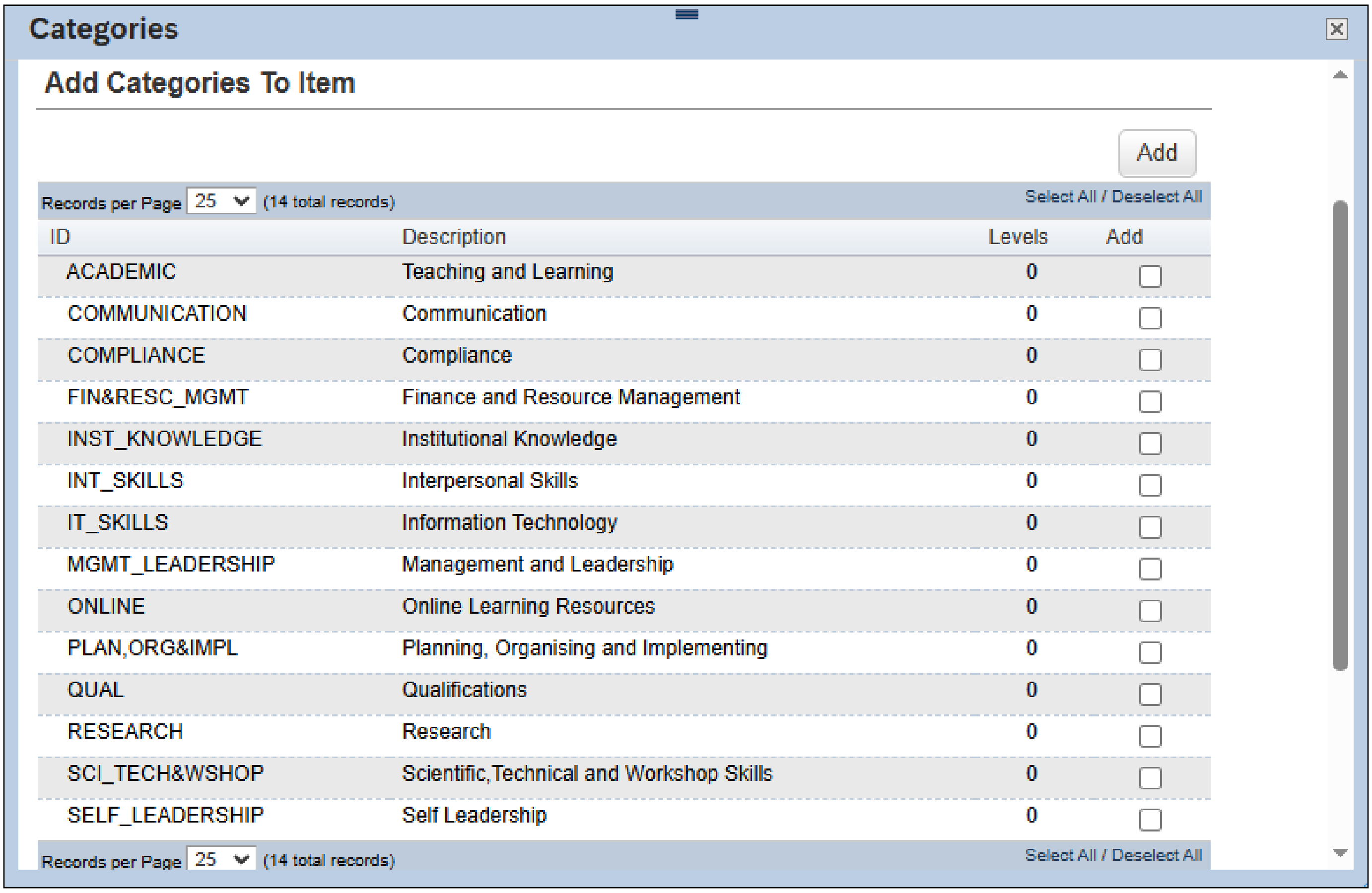
3. The *Categories* page appears. To change an existing category, skip to step 5.



- Click + *Add Categories*.

Items: Working with categories (continued)

4. The *Categories* dialogue box appears.



Categories

Add Categories To Item

Add

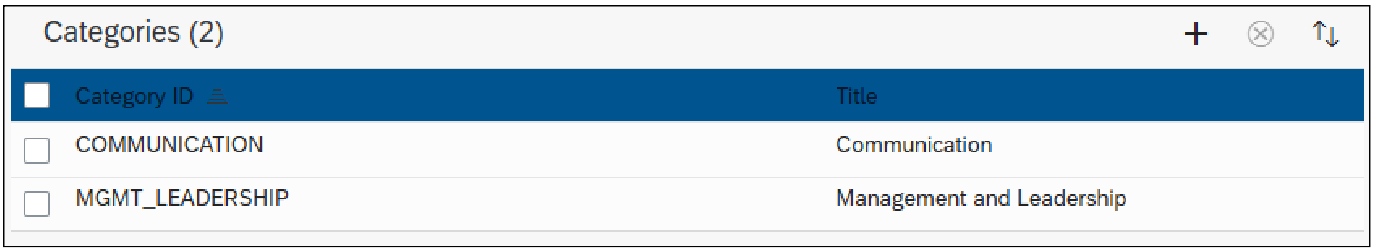
Records per Page 25 (14 total records) Select All / Deselect All

ID	Description	Levels	Add
ACADEMIC	Teaching and Learning	0	☐
COMMUNICATION	Communication	0	☐
COMPLIANCE	Compliance	0	☐
FIN&RESC_MGMT	Finance and Resource Management	0	☐
INST_KNOWLEDGE	Institutional Knowledge	0	☐
INT_SKILLS	Interpersonal Skills	0	☐
IT_SKILLS	Information Technology	0	☐
MGMT_LEADERSHIP	Management and Leadership	0	☐
ONLINE	Online Learning Resources	0	☐
PLAN,ORG&IMPL	Planning, Organising and Implementing	0	☐
QUAL	Qualifications	0	☐
RESEARCH	Research	0	☐
SCI_TECH&WSHOP	Scientific,Technical and Workshop Skills	0	☐
SELF_LEADERSHIP	Self Leadership	0	☐

Records per Page 25 (14 total records) Select All / Deselect All

- Choose the category (or categories) by selecting the appropriate check box in the *Add* column. The categories listed here are seen by the learner when they view the course library.
- Click Add.

5. The *Categories* page reappears, displaying the current categories.



Categories (2)

Category ID	Title
COMMUNICATION	Communication
MGMT_LEADERSHIP	Management and Leadership

- To add additional categories, click + *Add Categories* and repeat step 4 above.
- To remove a category, select the ☐ check box alongside the category name and click ⊗ *Remove*. A message indicates that the row was removed.

Items: Working with surveys

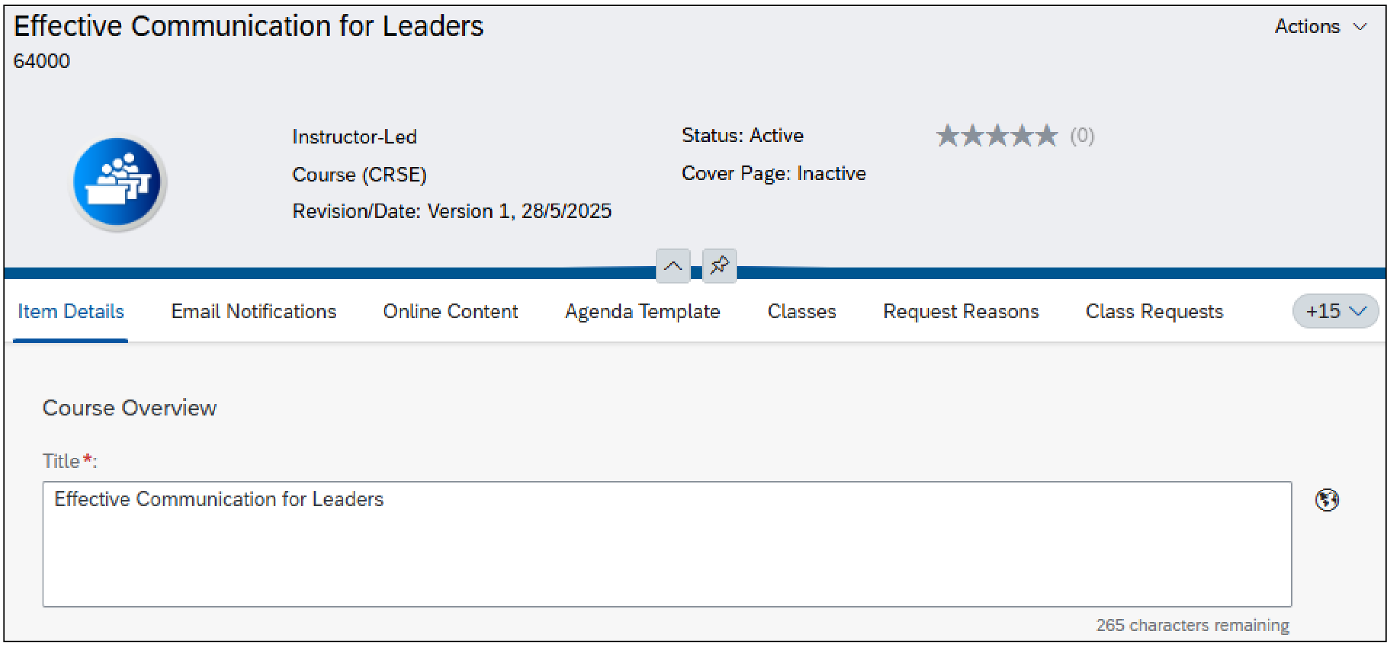
Background

Surveys are used to gather learner (and manager) feedback on completed training sessions and are linked to the item. To create a new survey (course feedback survey or follow-up survey), see: Creating a survey.

Note: For items with a course feedback survey, the learner must complete the survey for the item and certificate to appear in their learning history.

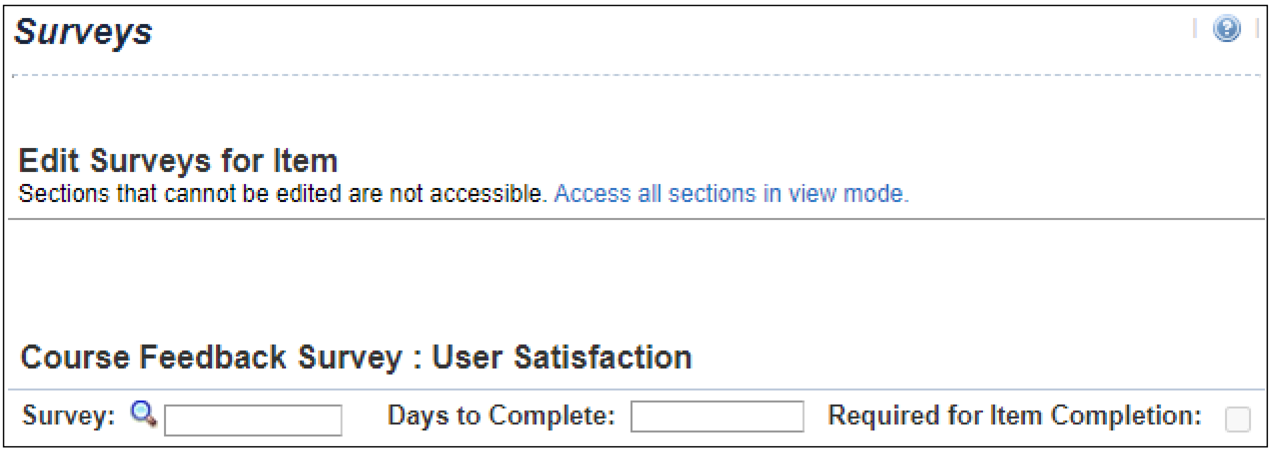
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate learning item.



- In the item menu, click *Surveys* or select it from the dropdown menu on the right.

3. The *Surveys* page appears.



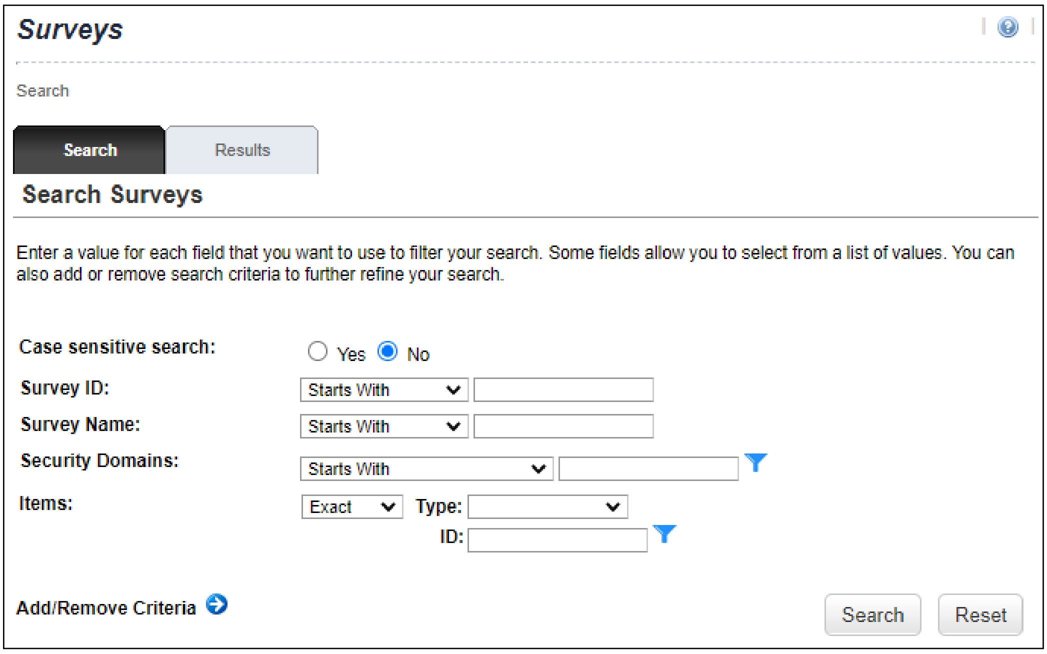
Adding a course feedback survey (or see: Adding a follow-up survey)

A course feedback survey is sent to the learner once they've completed the course, allowing for feedback on their experience in the course.

- In the *Course Feedback Survey* section, click 🔍 alongside the *Survey* field.

Items: Working with surveys (continued)

- The *Surveys* dialogue box appears.



Surveys

Search

Search | Results

Search Surveys

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes / No

Survey ID: Starts With

Survey Name: Starts With

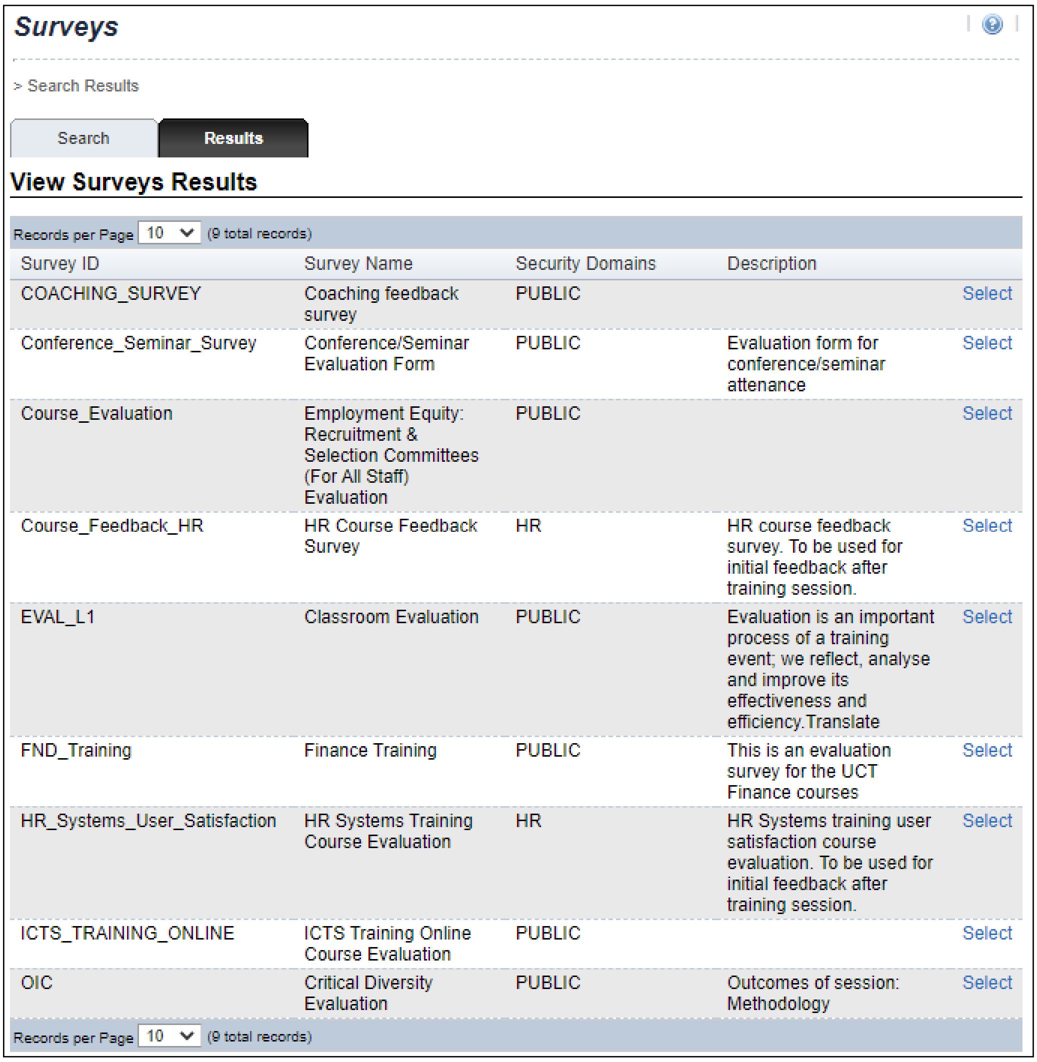
Security Domains: Starts With

Items: Exact **Type:** **ID:**

Add/Remove Criteria

Search Reset

- Click Search to display all course feedback surveys available to you.
- The *Surveys* dialogue box reappears, displaying the course feedback surveys.



Surveys

> Search Results

Search | Results

View Surveys Results

Records per Page 10 (9 total records)

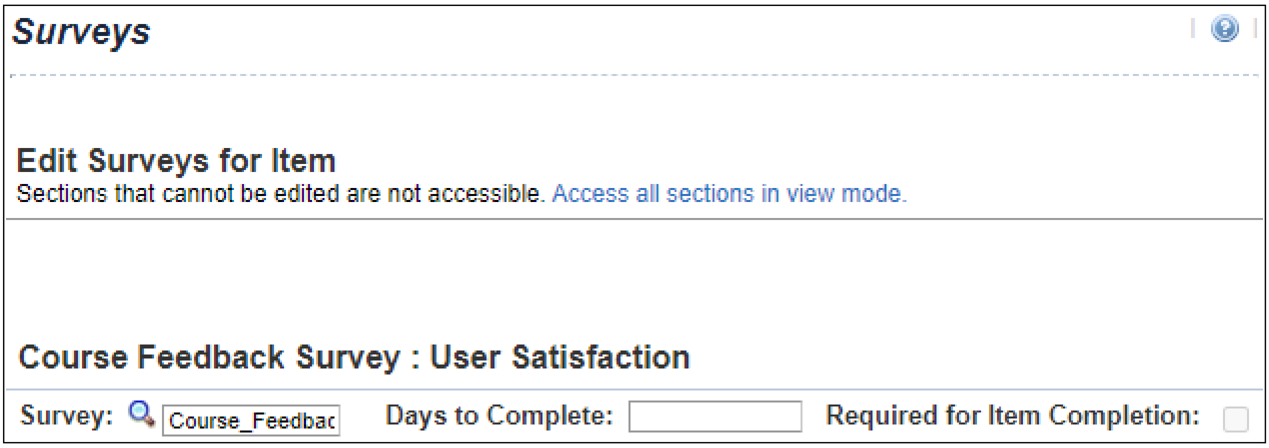
Survey ID	Survey Name	Security Domains	Description	
COACHING_SURVEY	Coaching feedback survey	PUBLIC		Select
Conference_Seminar_Survey	Conference/Seminar Evaluation Form	PUBLIC	Evaluation form for conference/seminar attenance	Select
Course_Evaluation	Employment Equity: Recruitment & Selection Committees (For All Staff) Evaluation	PUBLIC		Select
Course_Feedback_HR	HR Course Feedback Survey	HR	HR course feedback survey. To be used for initial feedback after training session.	Select
EVAL_L1	Classroom Evaluation	PUBLIC	Evaluation is an important process of a training event; we reflect, analyse and improve its effectiveness and efficiency.Translate	Select
FND_Training	Finance Training	PUBLIC	This is an evaluation survey for the UCT Finance courses	Select
HR_Systems_User_Satisfaction	HR Systems Training Course Evaluation	HR	HR Systems training user satisfaction course evaluation. To be used for initial feedback after training session.	Select
ICTS_TRAINING_ONLINE	ICTS Training Online Course Evaluation	PUBLIC		Select
OIC	Critical Diversity Evaluation	PUBLIC	Outcomes of session: Methodology	Select

Records per Page 10 (9 total records)

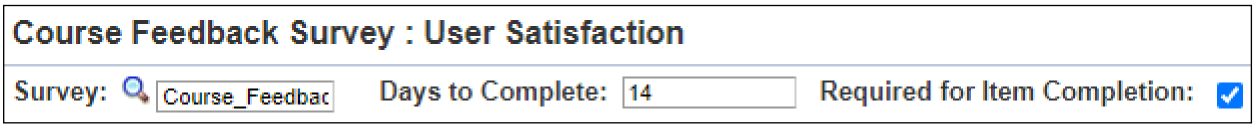
- Click Select alongside the appropriate survey.

Items: Working with surveys (continued)

- The *Surveys* page reappears, displaying the selected survey name in the *Course Feedback Survey* section.



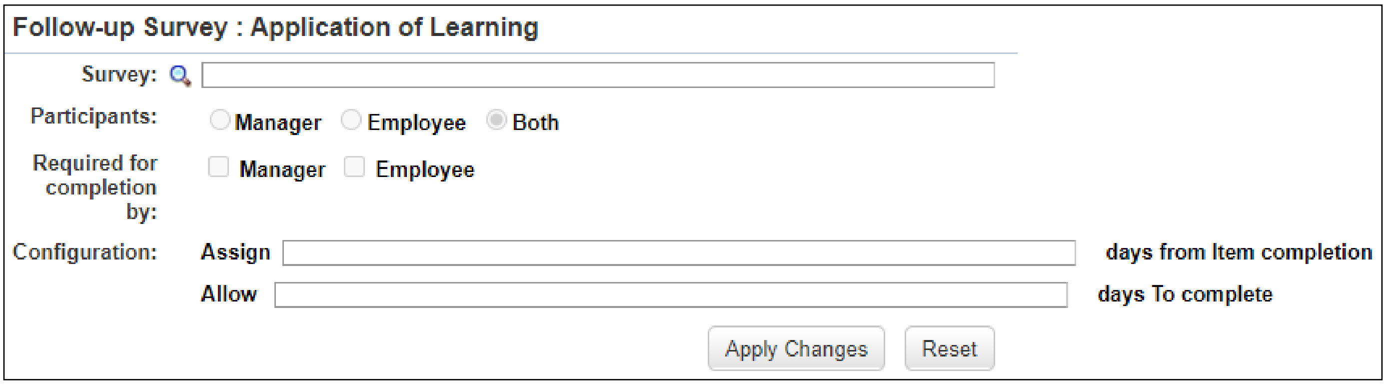
- Click Apply Changes at the bottom of the page to save the survey choice and to pull through any additional survey settings.



- If applicable, enter or change the number of days the learner has to complete the survey in the *Days to Complete* field.
- If applicable, change the selection in the *Required for Item Completion* field.
  If this check box is selected, the item/course will only appear in the learner's Learning History after they submit the survey.
- Click Apply Changes.

Adding a follow-up survey

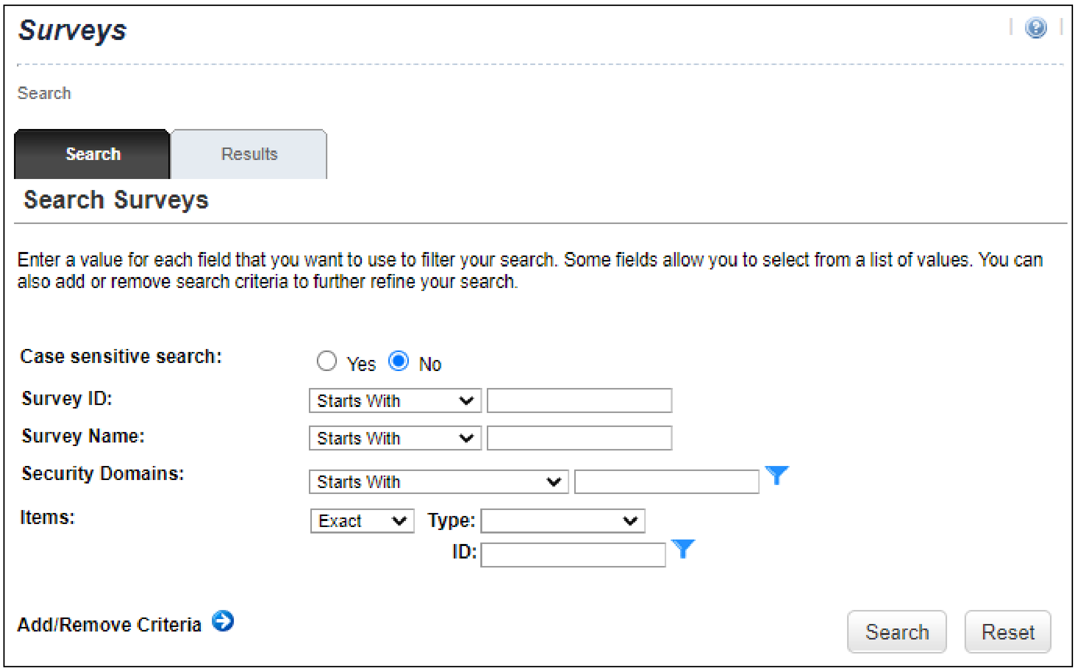
A follow up survey is sent to the learner (and/or their manager) a while after completing the course, allowing for feedback on changes in behaviour.



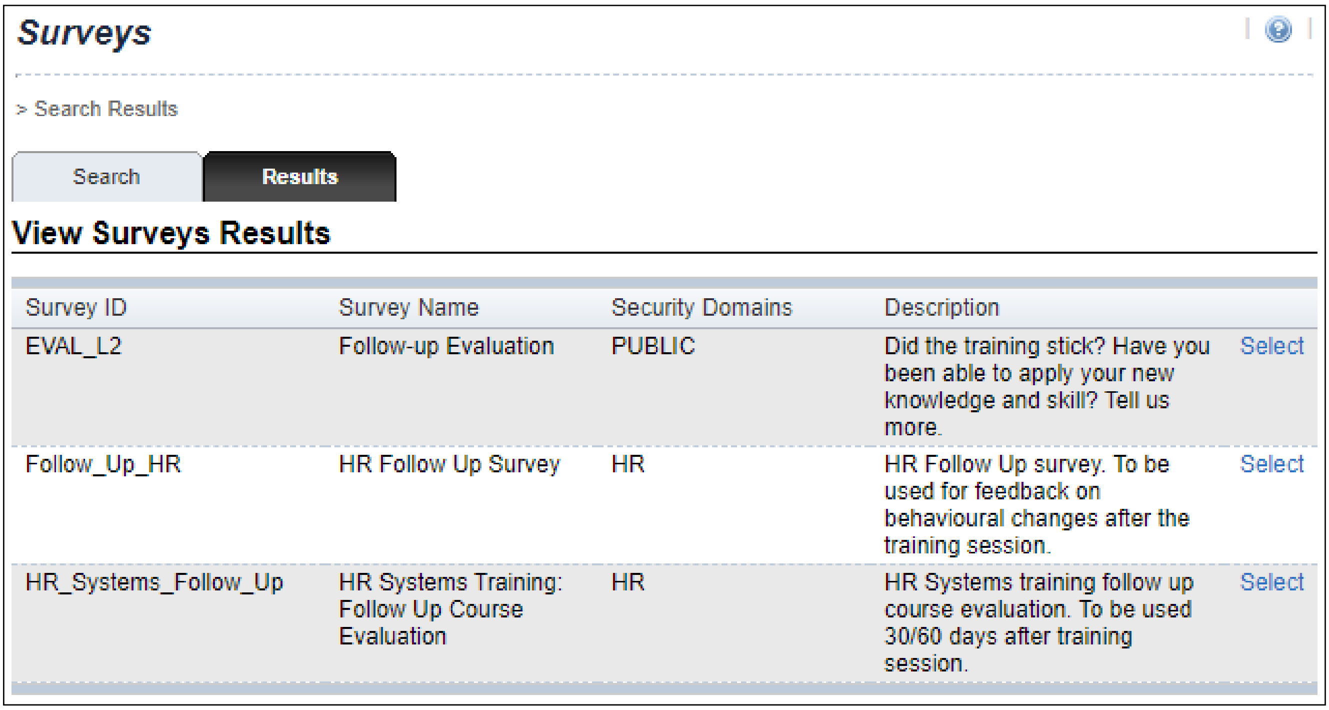
- In the *Follow Up Survey* section, click alongside the *Survey* field.

Items: Working with surveys (continued)

- The *Surveys* dialogue box appears.



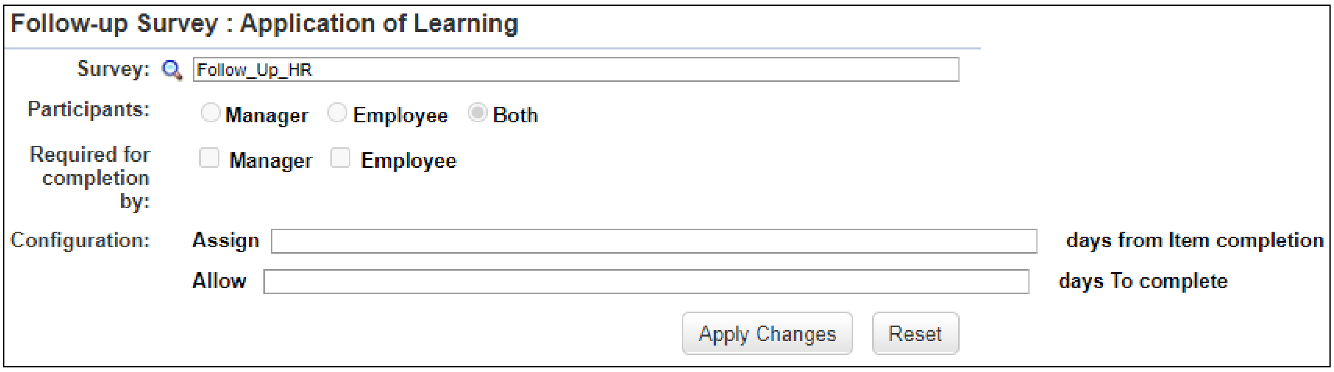
- Click Search to display all follow up surveys available to you.
- The *Surveys* dialogue box reappears, displaying the follow up surveys



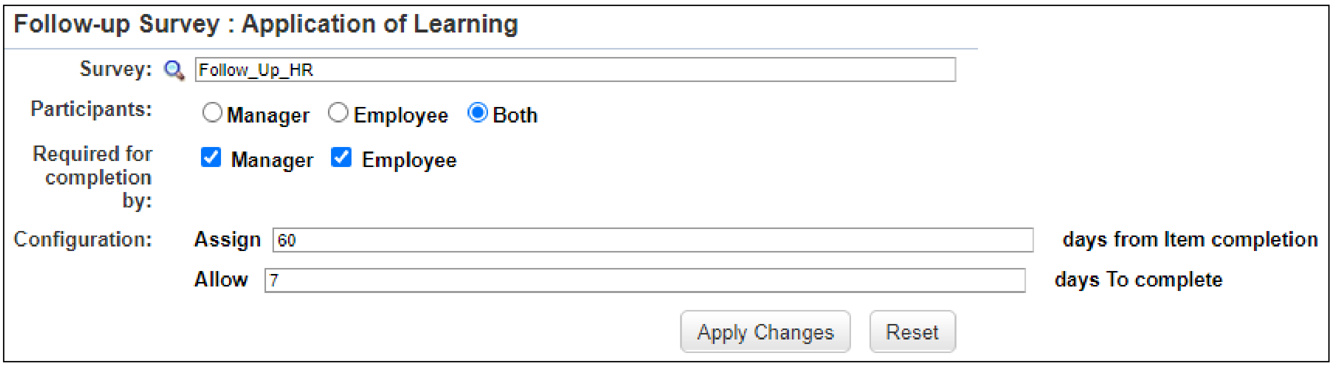
- Click Select alongside the appropriate survey.

Items: Working with surveys (continued)

- The *Surveys* page reappears, displaying the selected survey name in the *Follow-up Survey* section.



- Click Apply Changes to save the survey choice and to pull through any additional survey settings.



- If applicable, change any of the survey options. For more information, see: Follow up survey options.
- Click Apply Changes.

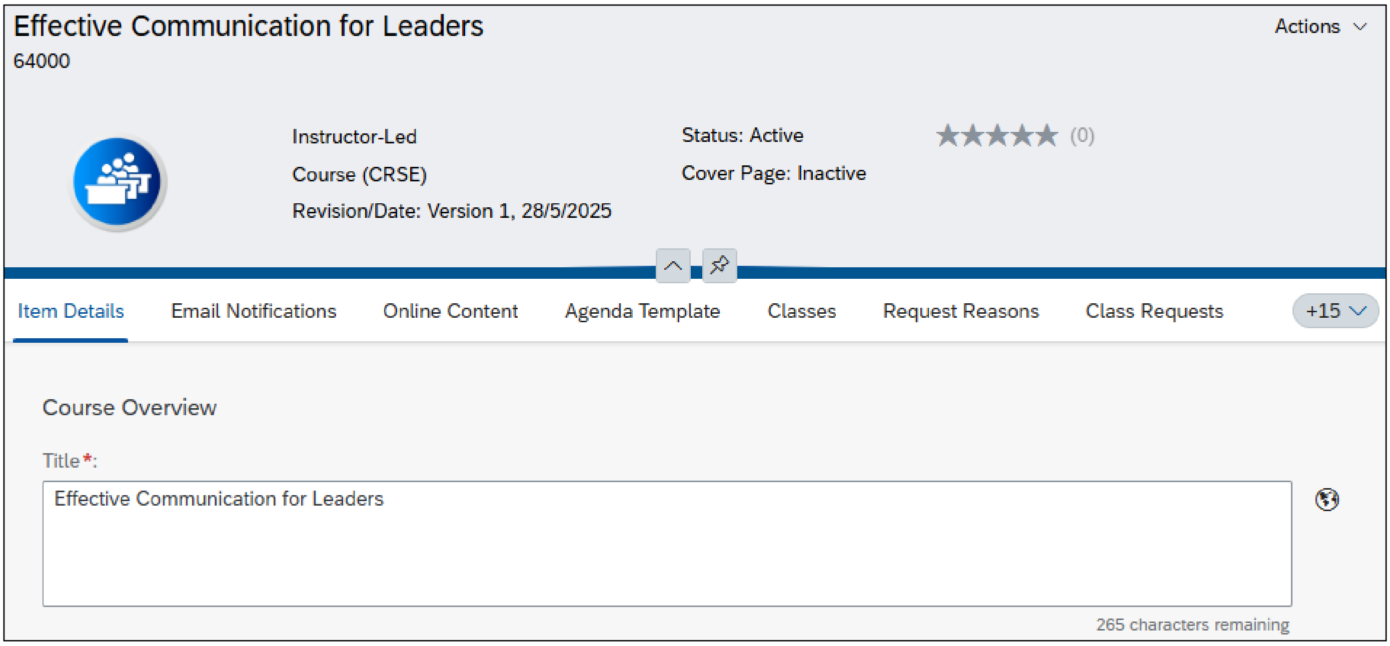
Items: Working with prerequisites

Background

A prerequisite is a learning item (course) that a learner must complete before they can register for this item.

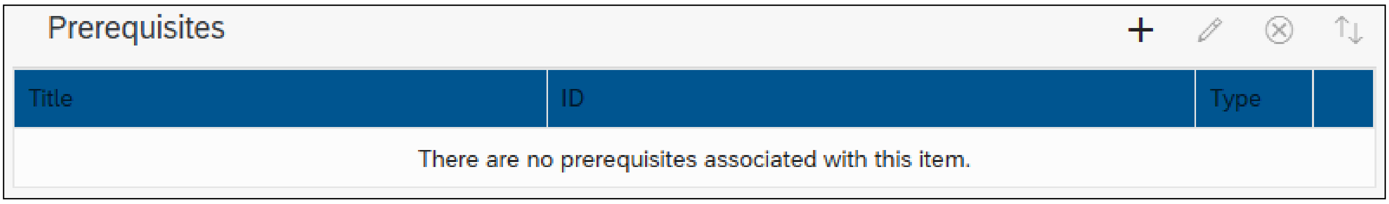
Procedure

1. [Log in to SuccessFactors and access the *Learning Administration* page](#).
2. [Search for the appropriate learning item](#).



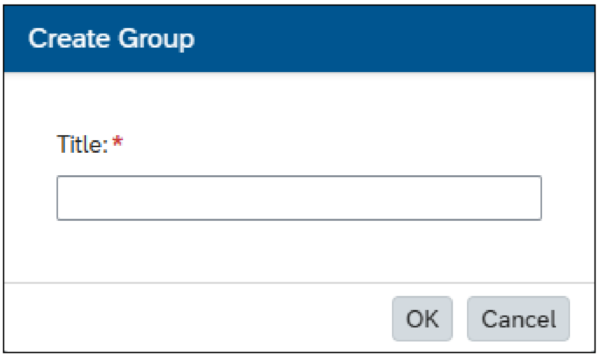
- In the item menu, click *Prerequisites* or select it from the dropdown menu on the right.

3. The *Prerequisites* page appears. To change existing prerequisites, skip to step 8.



- Click + *Create Group*.

4. The *Create Group* dialogue box appears.
   All items (courses) in a prerequisite group must be completed before the learner can register on the current item. If there are multiple tracks the learner could take to complete the prerequisite, then each set of items is placed in a group.



- Enter the *Title* for the new prerequisite group.
- Click 

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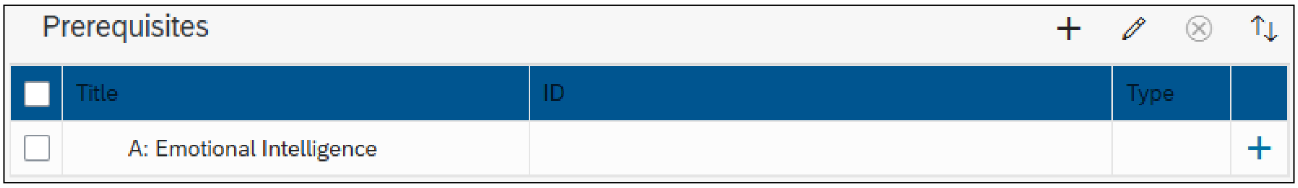
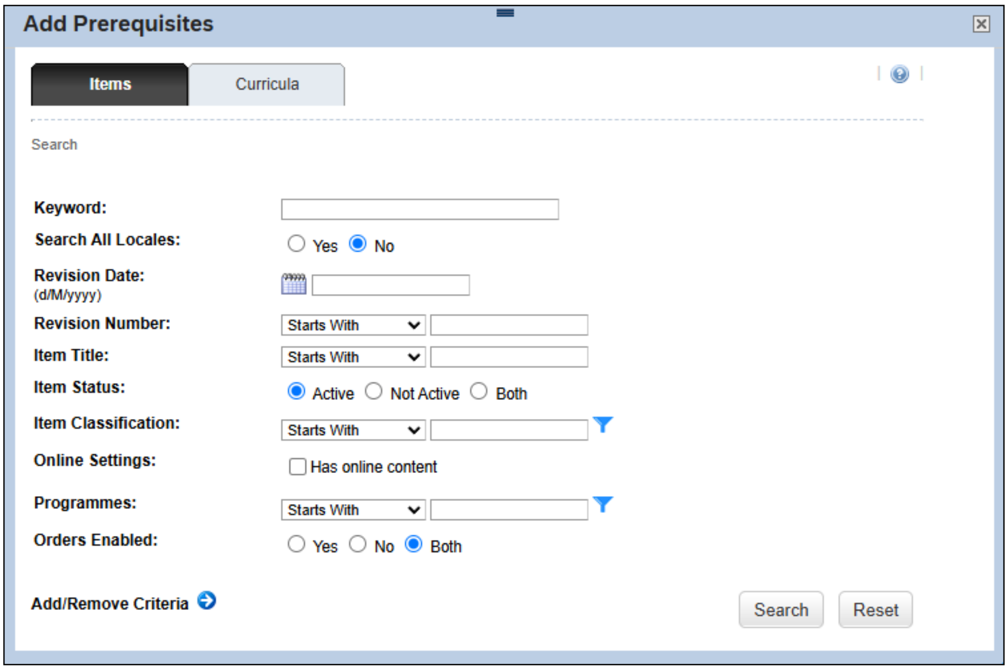
Items: Working with prerequisites (continued)

5. The *Prerequisites* page reappears, displaying the new group.



- Click + *Add items/curricula* next to the *Type* column to choose an existing learning item(s) to add to the group.

6. The *Add Prerequisites* dialogue box appears.

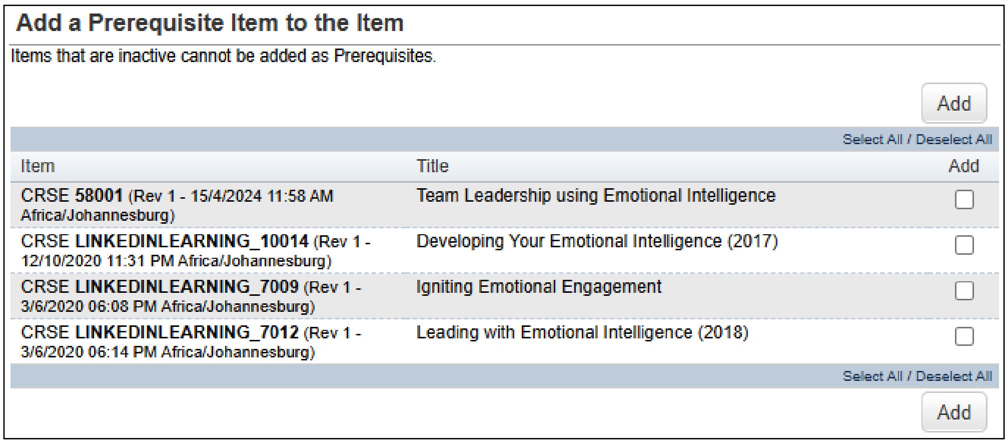


- To find the item(s), enter search criteria in any of the available fields (e.g. *Item Title*) or leave all fields blank to see a full list of all available learning items.

  Note: If a smaller *Add Prerequisites* dialogue box appears, use the *Keyword* field to find a specific item.

- Click Search.

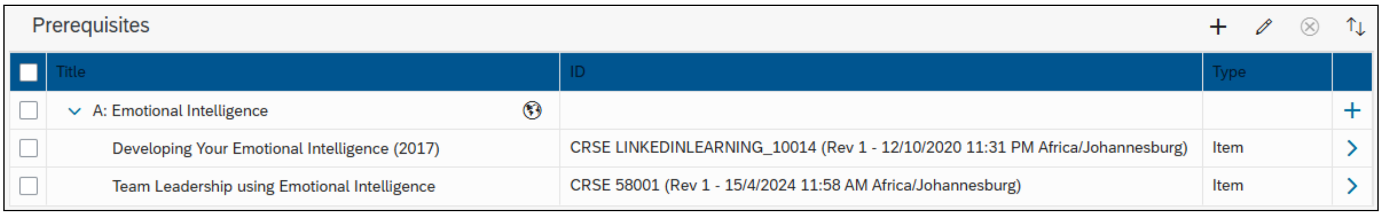
7. The *Add a Prerequisite Item to the Item* section appears.



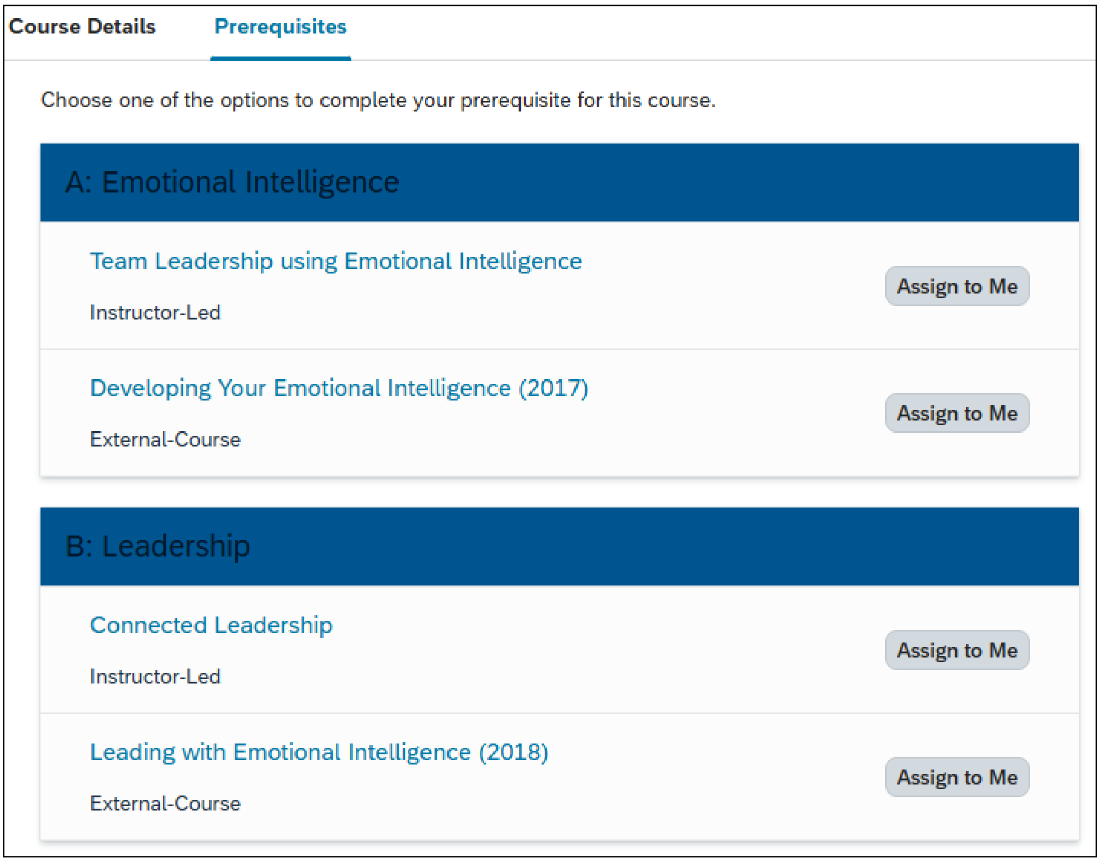
- To view more search results, either change the number of *Records per Page* using the dropdown arrow or click Next».
- Choose the learning item(s) by selecting the appropriate check box in the *Add* column.
- Click Add.

Items: Working with prerequisites (continued)

8. The *Prerequisites* page reappears, displaying the prerequisite group and the learning items within the group.



- Click Save. A message indicates that the changes were saved.
- To add additional prerequisite groups, click + *Create Group* and repeat from step 4 above.
- To remove a learning item or prerequisite group, select the ☐ check box alongside the item or group and click ⊗ *Remove*. A message indicates that the entity was removed.
- To change prerequisite group names, click *Edit*. Make the necessary changes and click Save. A message indicates the changes were saved.
- View the learning item in the course library to see how the prerequisites display for the learner.



Items: Creating a survey

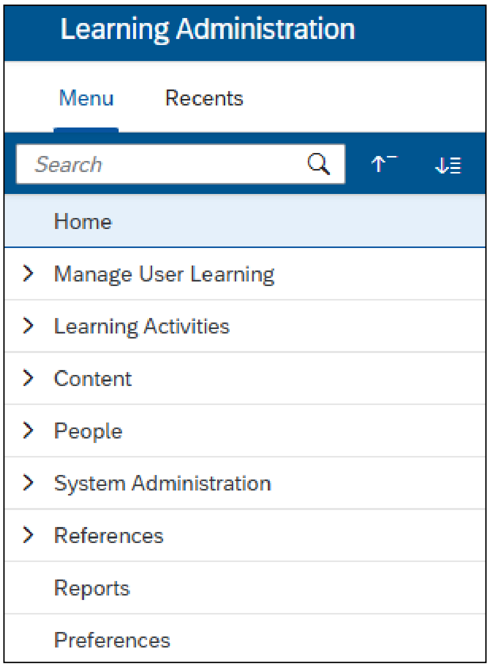
Background

Surveys are used to gather learner (and manager) feedback on completed training sessions and are linked to the item. To link an existing survey to a learning item, see: Items: Working with surveys.

Note: For items with a course feedback survey, the learner must complete the survey for the item and certificate to appear in their learning history.

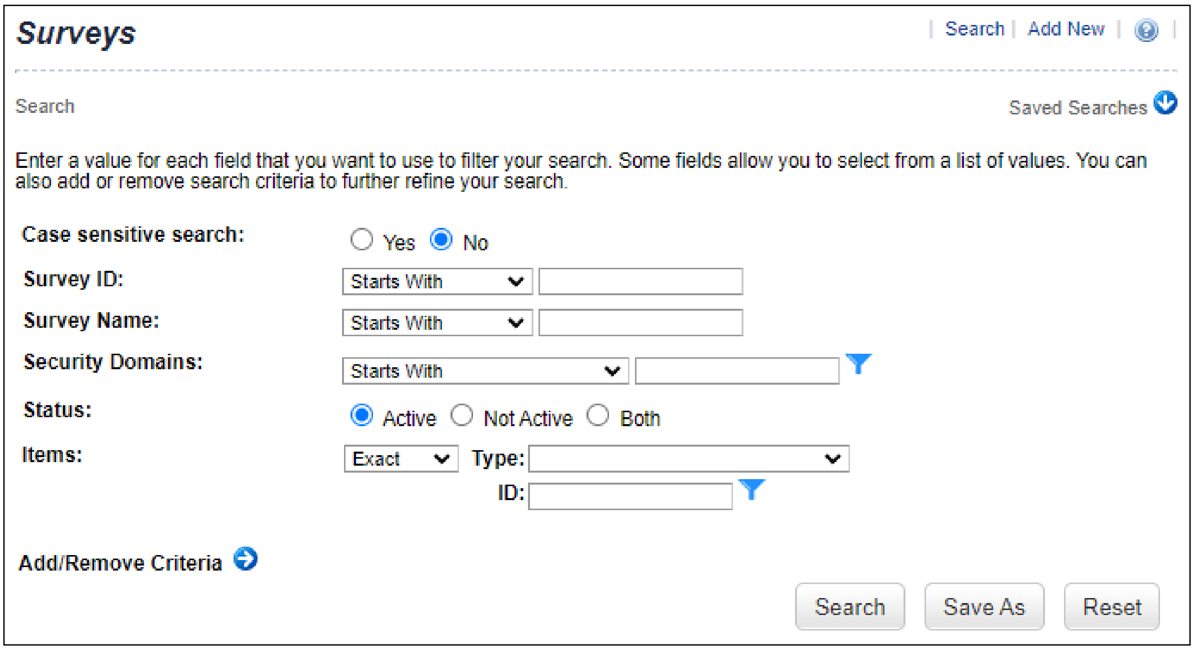
Procedure

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



- In the *Menu*, choose *Content* > *Surveys*.

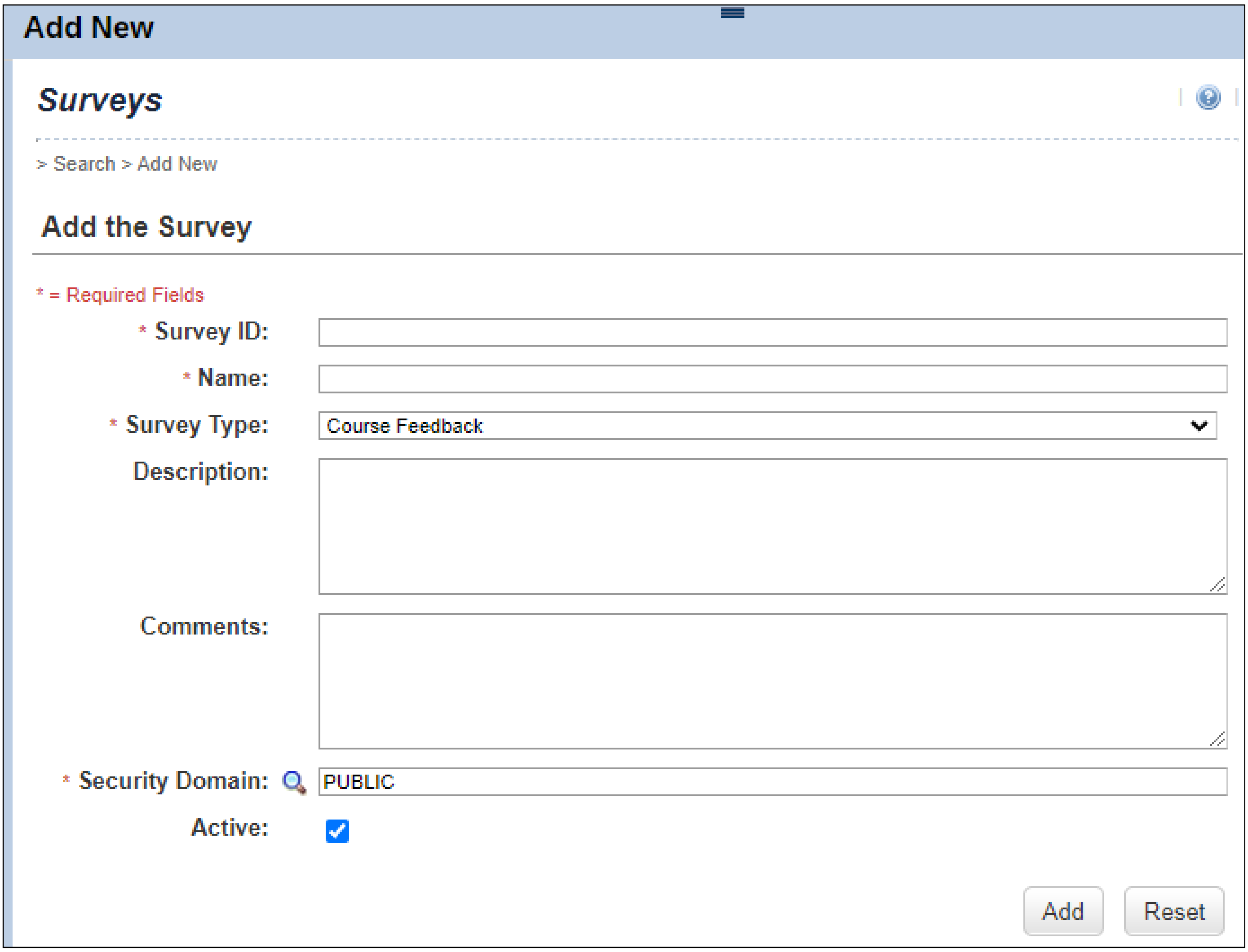
2. The *Surveys* page appears.



- Click Add New.

Items: Creating a survey (continued)

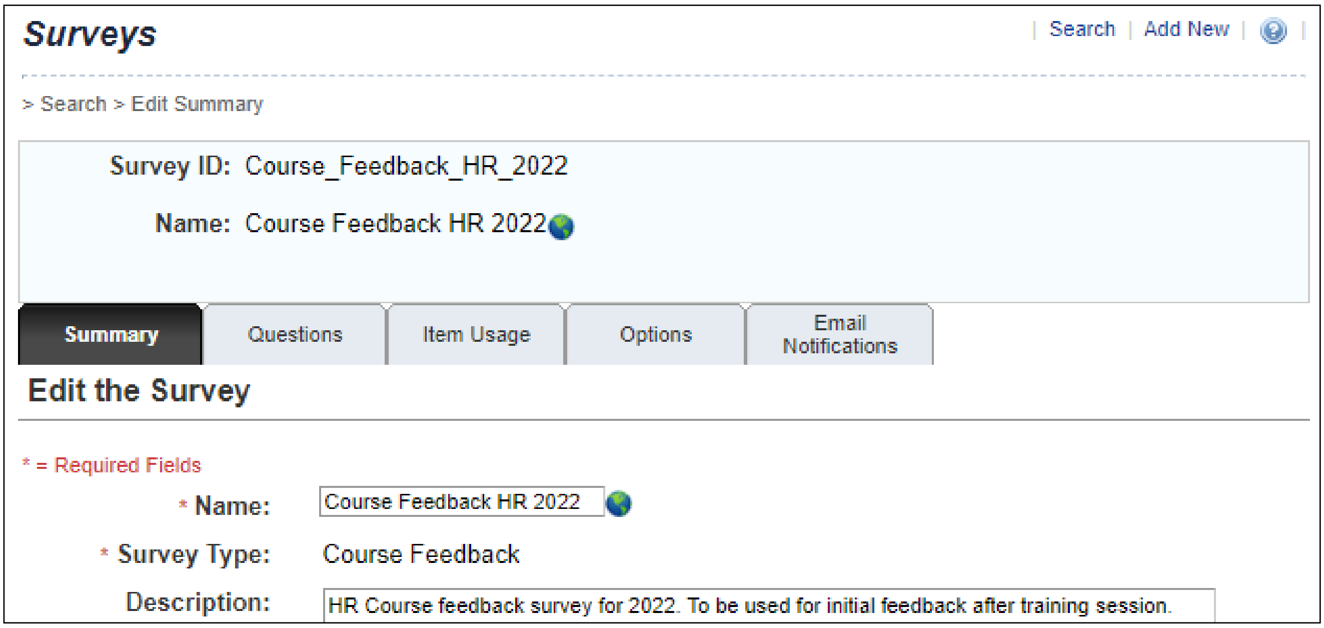
3. The *Add New* dialogue box appears.



- Enter the *Survey ID* e.g. Course_Feedback_HR, Follow_Up_HR.
- Enter the full *Name* of the survey.
- Select the *Survey Type* i.e. Course Feedback or Follow-up Survey.
  - Course Feedback is a user satisfaction survey to hear from the learner about their experience in the course.
  - Follow-up Survey asks observers to comment on changes in behaviour after the learner completes a course, whether the learner is applying the new knowledge or skill.
- If applicable, enter a *Description* and *Comments*.
- If applicable, change the *Security Domain* to the area of the university responsible for the survey. If this field is set to PUBLIC, all Learning Administrators could edit and use the survey.
  - To change the *Security Domain*, click .
  - The *Security Domains* dialogue box appears.
  - Click Search to display the list of available domains.
  - Select the area of the university responsible for the survey.
- Click Add.

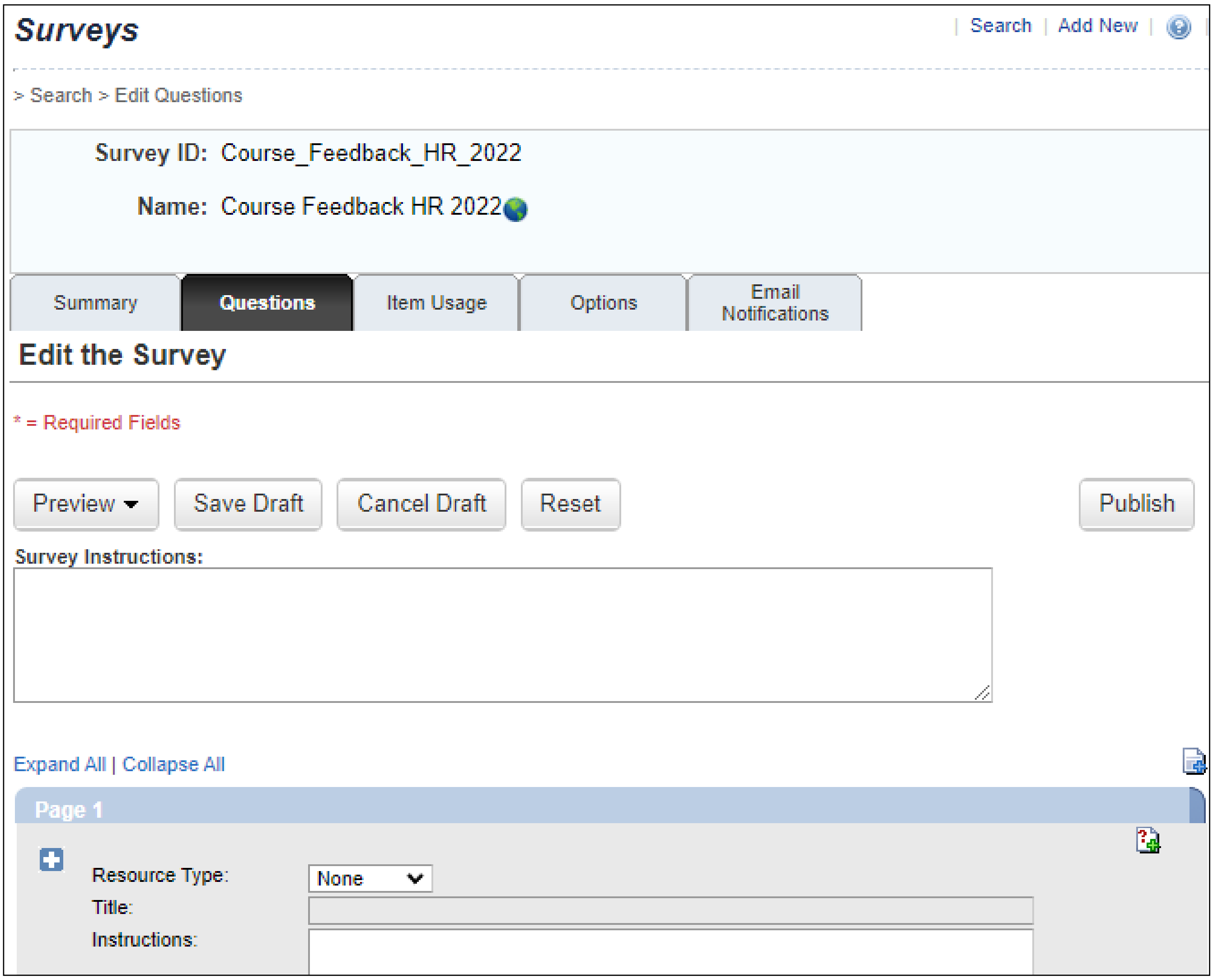
Items: Creating a survey (continued)

4. The *Surveys* page reappears, displaying the *Summary* tab.



- Click the Questions tab.

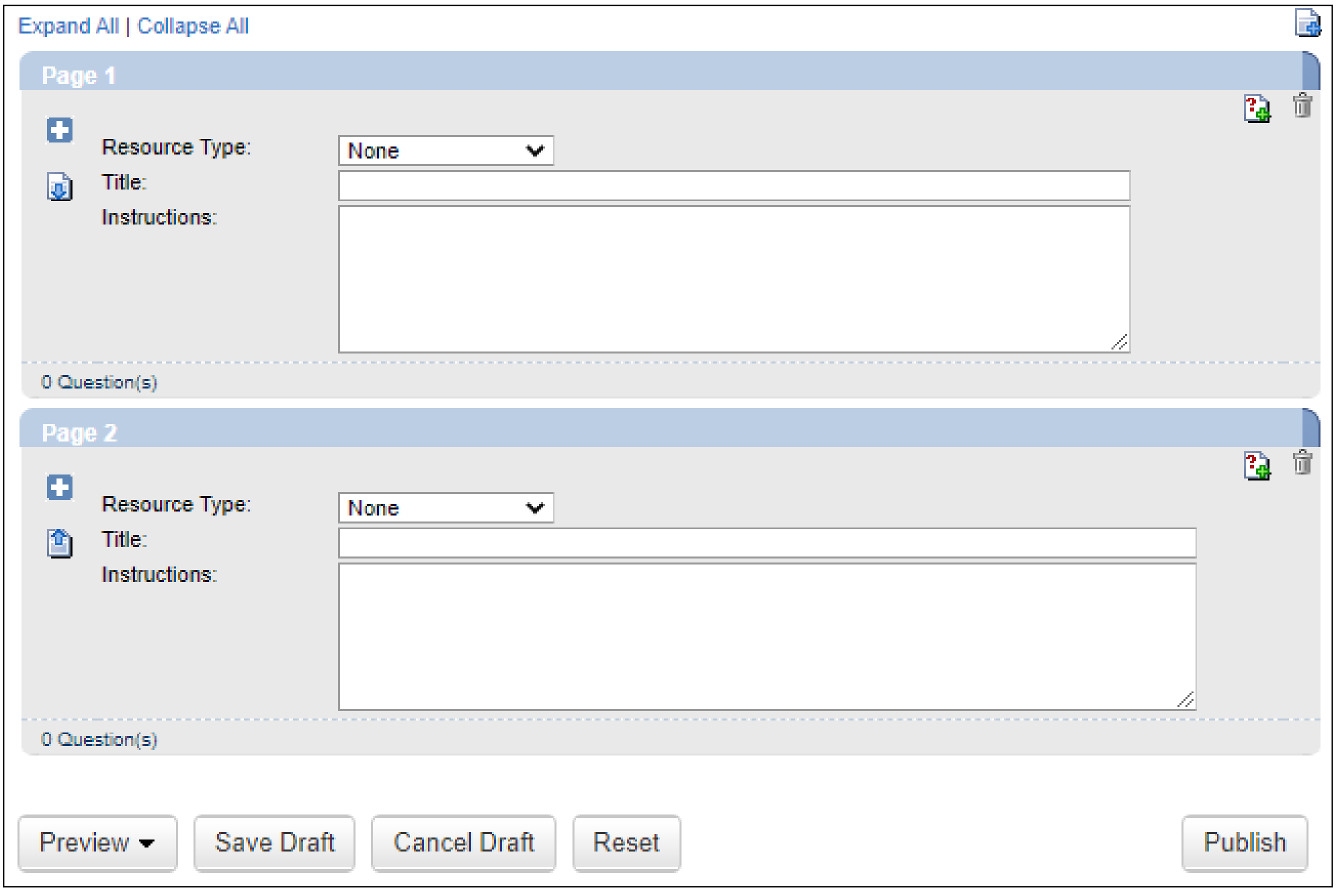
5. The *Surveys* page reappears, displaying the *Questions* tab.



- Enter an introduction in the *Survey Instructions* field.

Items: Creating a survey (continued)

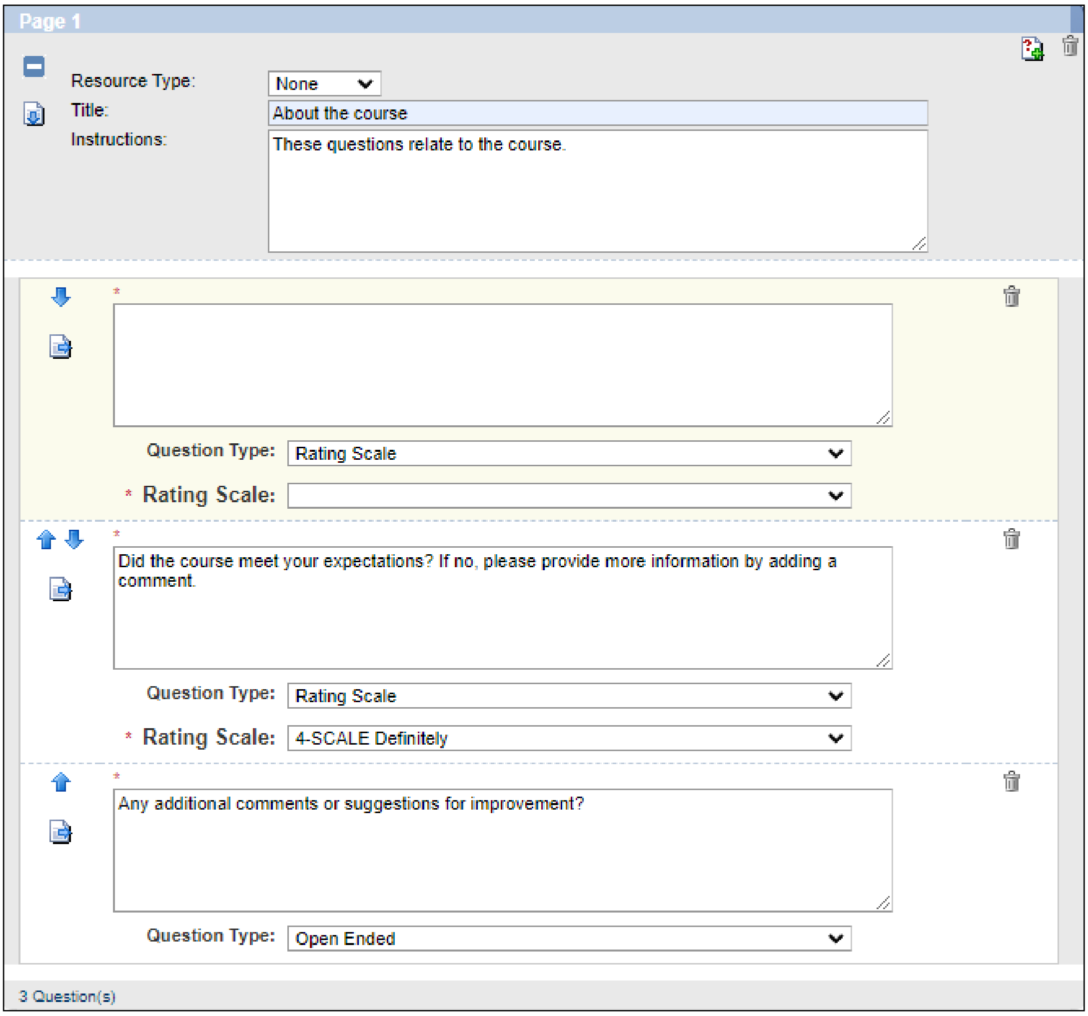
- If the survey should be divided into pages (e.g. page 1 covers feedback on the course, page 2 covers feedback on the instructor), click *Add Page* to create as many pages as required. Click *Remove Page* to remove any unnecessary pages.



- If applicable, select the *Resource Type* for each page e.g. on page 2 select instructor as the *Resource Type* if the questions on the page relate to the instructor.
- Enter the page *Title* e.g. Evaluate the course, Feedback on the course, About the course, About the instructor.
- If applicable, enter *Instructions* for each page.
- Click *Add Question* to create as many questions as required for each page.

Items: Creating a survey (continued)

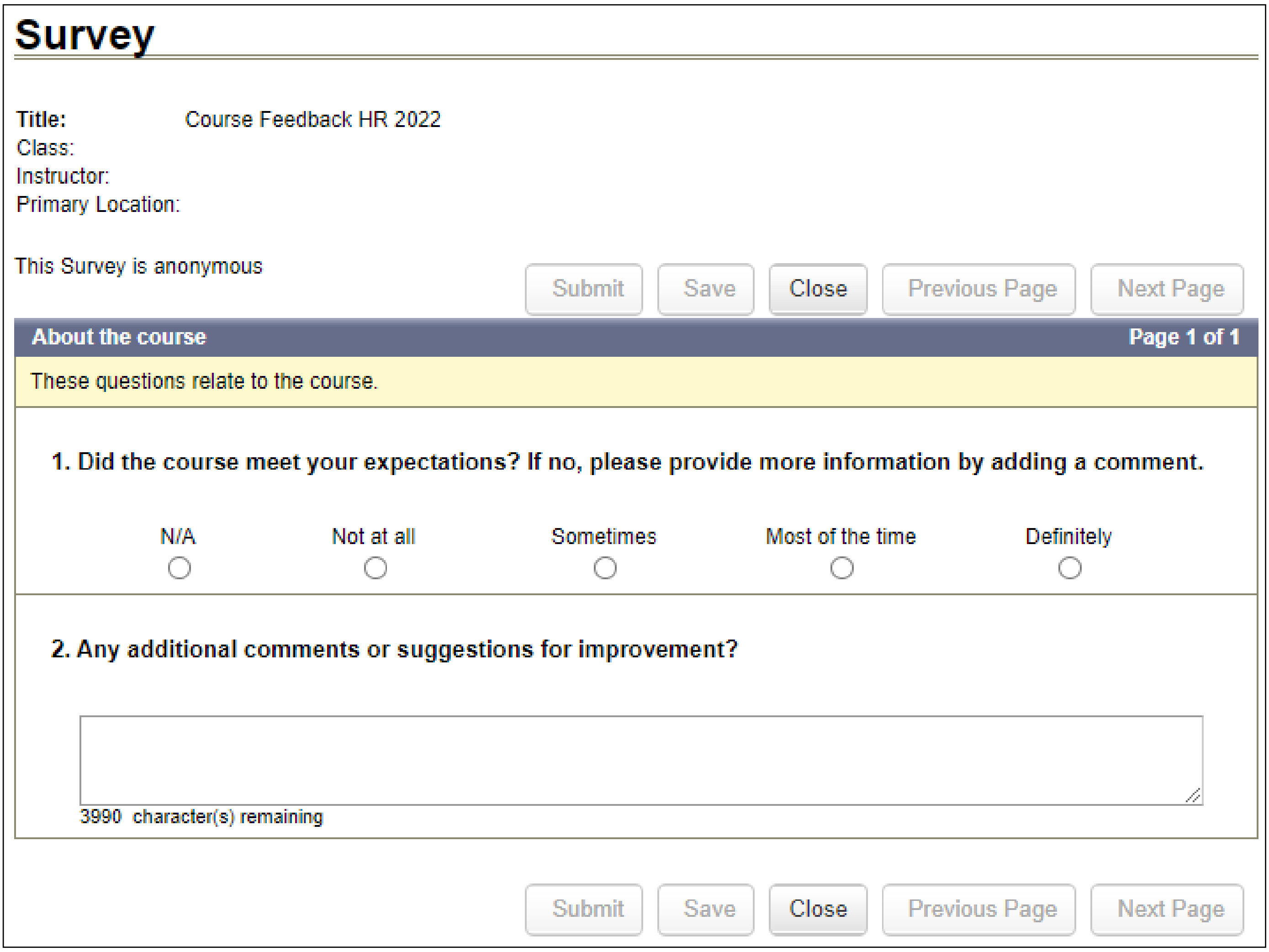
6. A blank line appears for each question added to a page.



- Click *Remove Question* to remove any unnecessary question lines.
- Enter the question wording in the first available text box.
- Select the *Question Type*.
  - If *Rating Scale* question type, select the appropriate *Rating Scale*.
    Note: The rating scales can be viewed when the survey is previewed.
  - If *Multiple Choice* question type, enter the answer choices by clicking *Add Answer*. Learners will be able to select more than one answer to the question.
  - If *One Choice* question type, enter the answer choices by clicking *Add Answer*. Learners will only be able to select one answer to the question.
  - If *Open Ended* question type, the learner will be provided with space to enter their answer to the question.
- Use the *Move Question Up* and *Move Question Down* buttons to re-order questions as required.
- Use the *Move Question* button to move the selected question to another page in the survey.
- Use the *Move Page Up* and *Move Page Down* buttons to re-order pages.
- Click Save Draft.
- Click Preview and choose Draft.

Items: Creating a survey (continued)

7. The *Survey* dialogue box appears, displaying the preview of the draft survey.

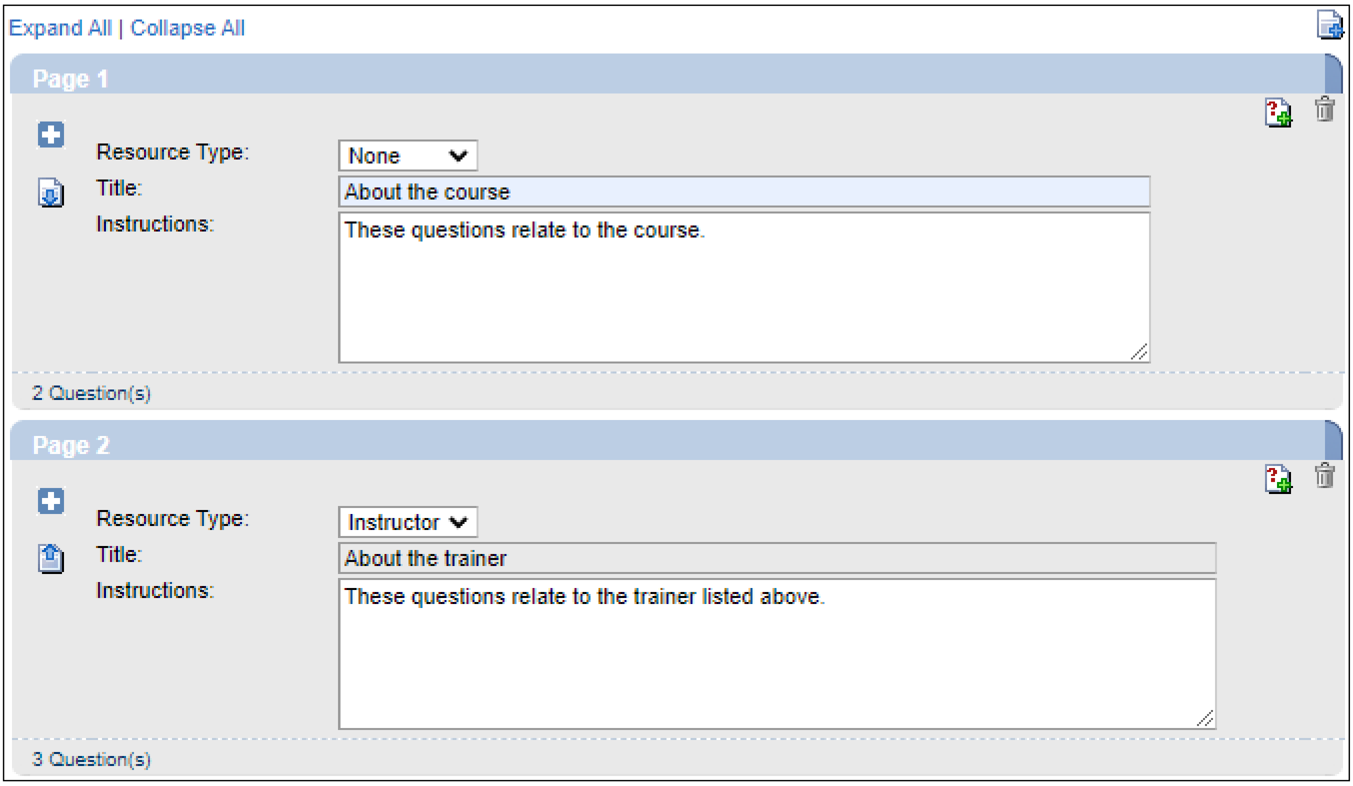


Note: The setting to allow learners to add a comment for every question is available in the *Options* tab, covered later in the guide.

- If the survey has multiple pages, click Next Page to view the additional pages.
- After reviewing the survey, click Close.

Items: Creating a survey (continued)

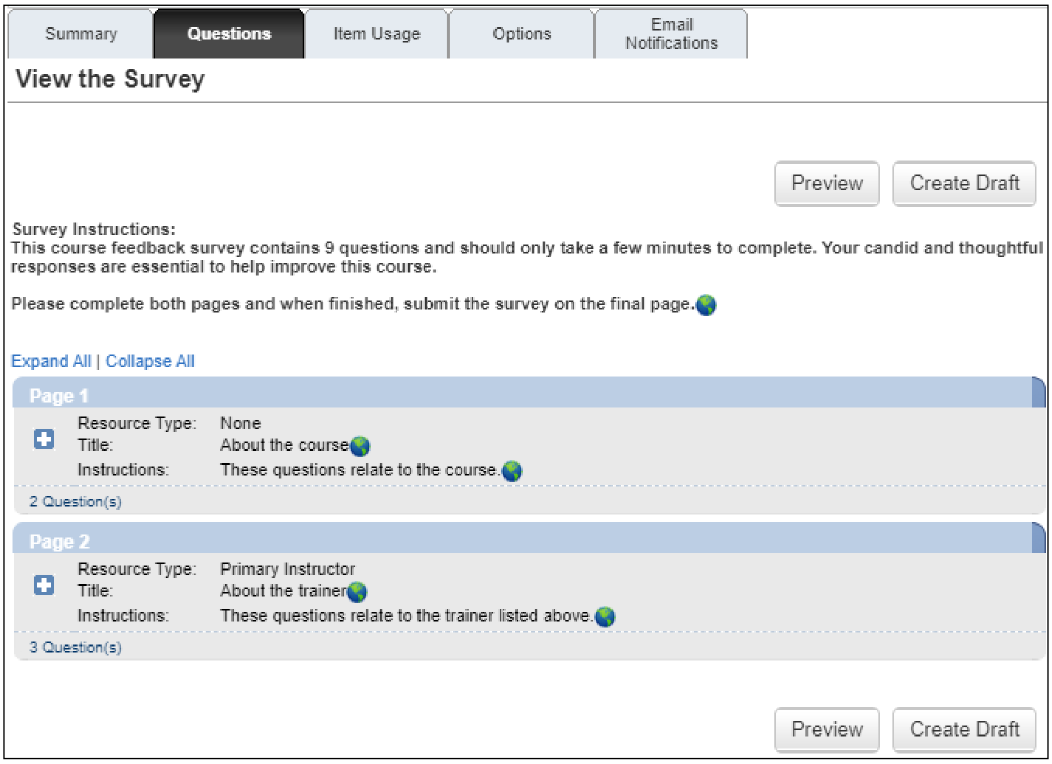
8. The *Questions* tab reappears.



- Click Expand All to view all pages and questions or click *Open/Close Page* to view a single page.
- If the survey requires changes, make the necessary edits to the pages and questions.
- To preview the survey again, click Save Draft. Click Preview and choose Draft.
- When the editing is complete, click Publish.

Items: Creating a survey (continued)

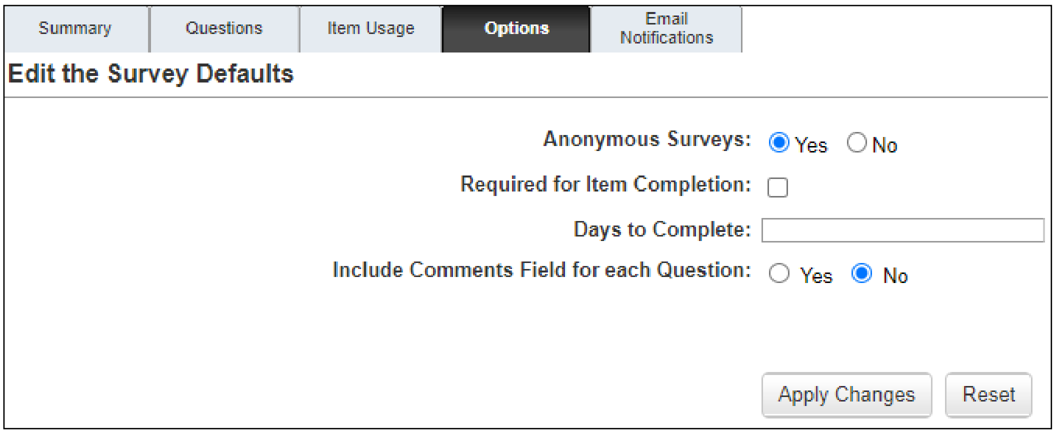
9. The *Questions* tab reappears.



- Click the Options tab.

10. The *Options* tab appears, displaying either the options for a course feedback survey or the options for a follow up survey depending on the type of survey created.

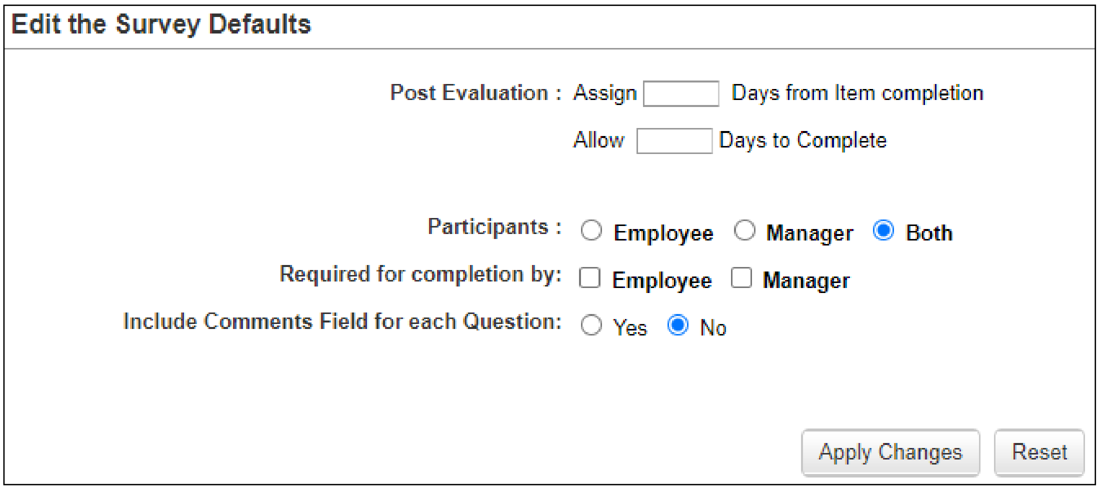
Course feedback survey options (see next page for **follow up survey** options)



- By default, the survey is anonymous, change this option if applicable.
- If the learner must complete the survey before the item/course is deemed complete, ensure *Required for Item Completion* is selected. The item/course will only appear in the learner's Learning History after they submit the survey.
- To specify the time in which the learner must complete the survey, enter the appropriate number in the *Days to Complete* field e.g. 7 for 1 week, 14 for 2 weeks.
- Select the appropriate option for *Include Comments Field for each Question*.
- Click Apply Changes to save.
- To view the final survey, return to the Questions tab and click Preview. The survey is now ready to be linked to new or existing learning items, see: Working with surveys.

Items: Creating a survey (continued)

Follow up survey options

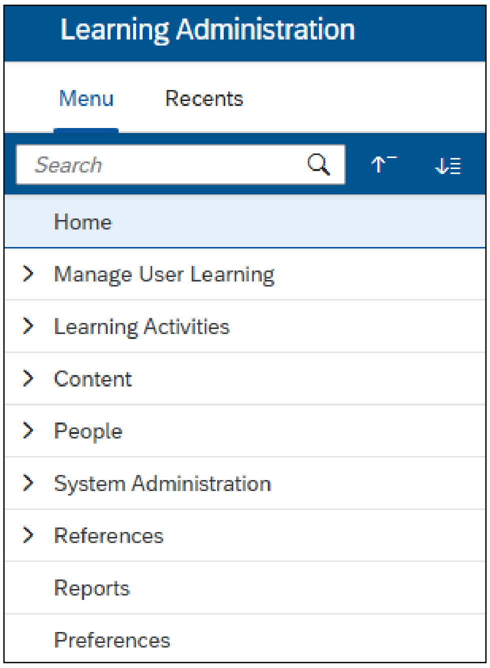


- In the *Post Evaluation* section, enter the number of *Days from Item Completion* e.g. 30, 60. SuccessFactors will automatically assign the follow up survey to the employee and/or manager when it reaches the specified number of days after learners completed the class.
- To specify the time in which the learner and/or manager must complete the survey, enter the appropriate number in the *Days to Complete* field e.g. 7 for 1 week, 14 for 2 weeks.
- In the *Participants* section, make appropriate selections to decide who receives a copy of the survey. **Note**: If the survey is going to both the learner and their manager, consider the wording of the survey questions to ensure they can be understood and answered from both perspectives.
- In the *Required for completion by* section, make appropriate selections to decide who is required to complete the survey. Ensure that any roles selected here are also selected in the *Participants* section, i.e. if the manager is required to complete the survey they must also be chosen as a participant.
- Select the appropriate option for *Include Comments Field for each Question*.
- Click Apply Changes to save and refresh the page.
- To view the final survey, return to the Questions tab and click Preview. The survey is now ready to be linked to new or existing learning items, see: Working with surveys.

Viewing submitted survey data

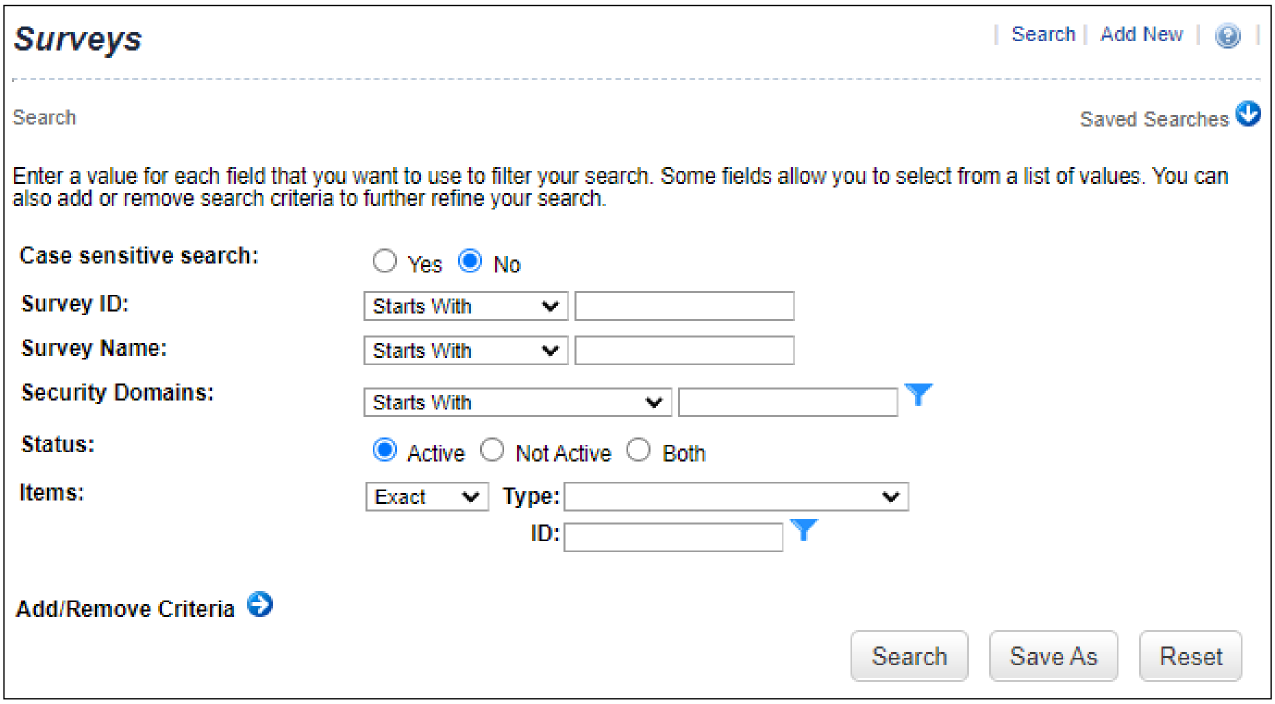
Procedure

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



   - In the *Menu*, choose *Content* > *Surveys*.

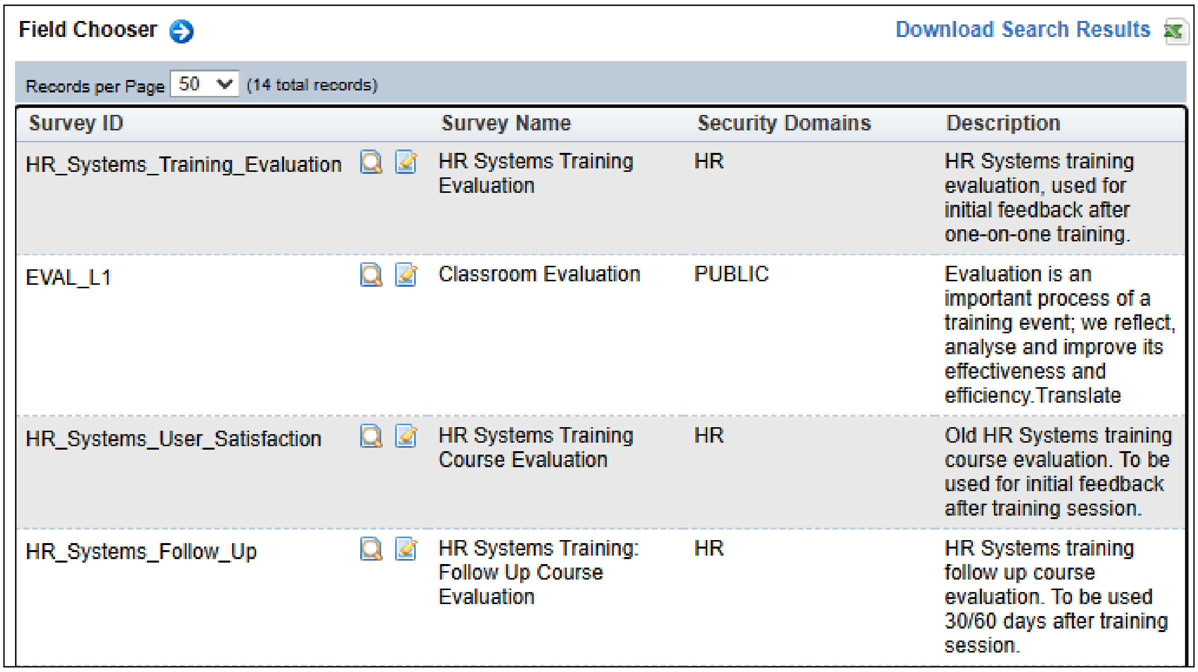
2. The *Surveys* page appears.



   - Click Search to display all surveys you have authorisations to use.

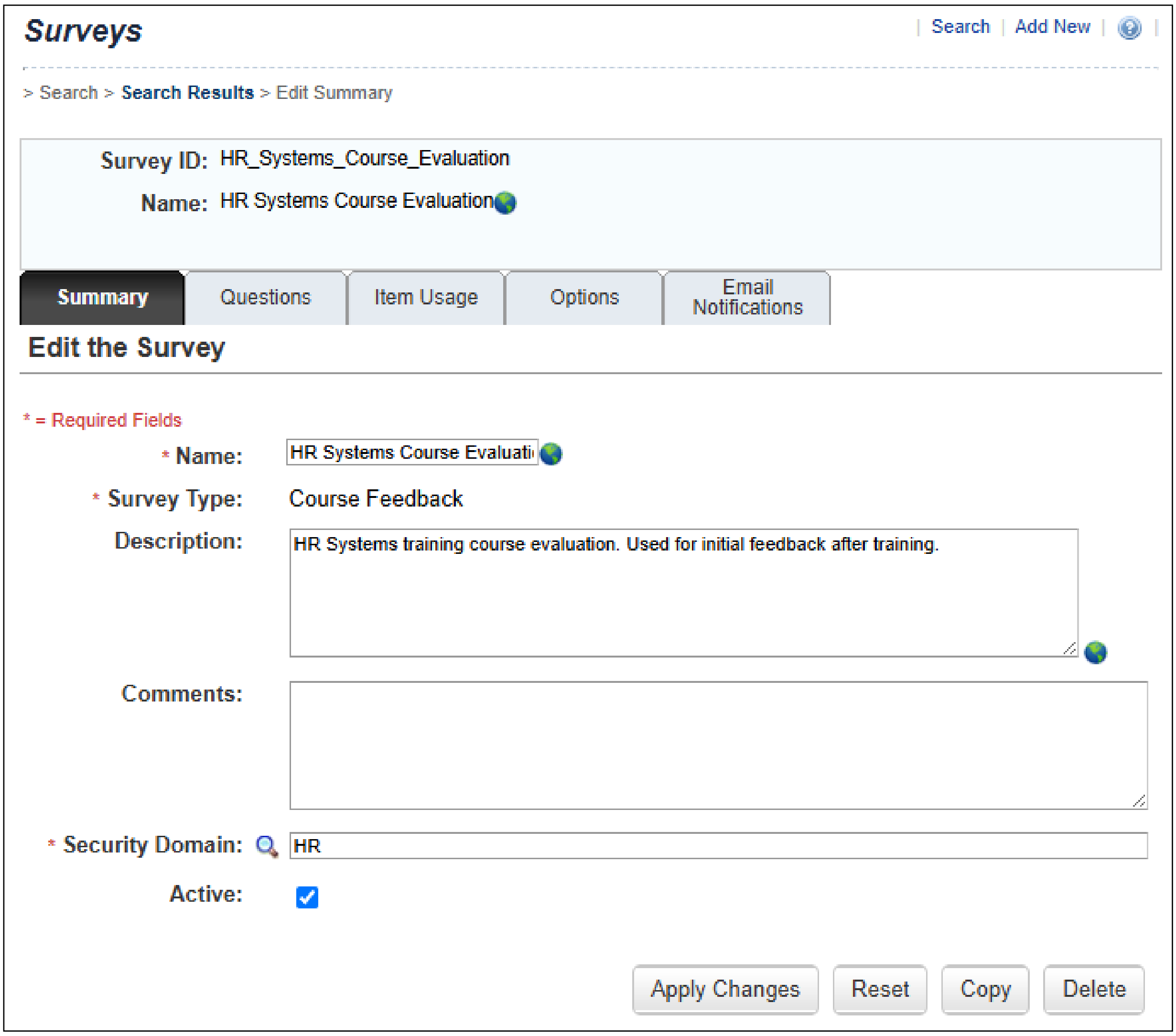
Viewing submitted survey data (continued)

3. The search results appear at the bottom of the *Surveys* page.



- Click alongside the appropriate survey.

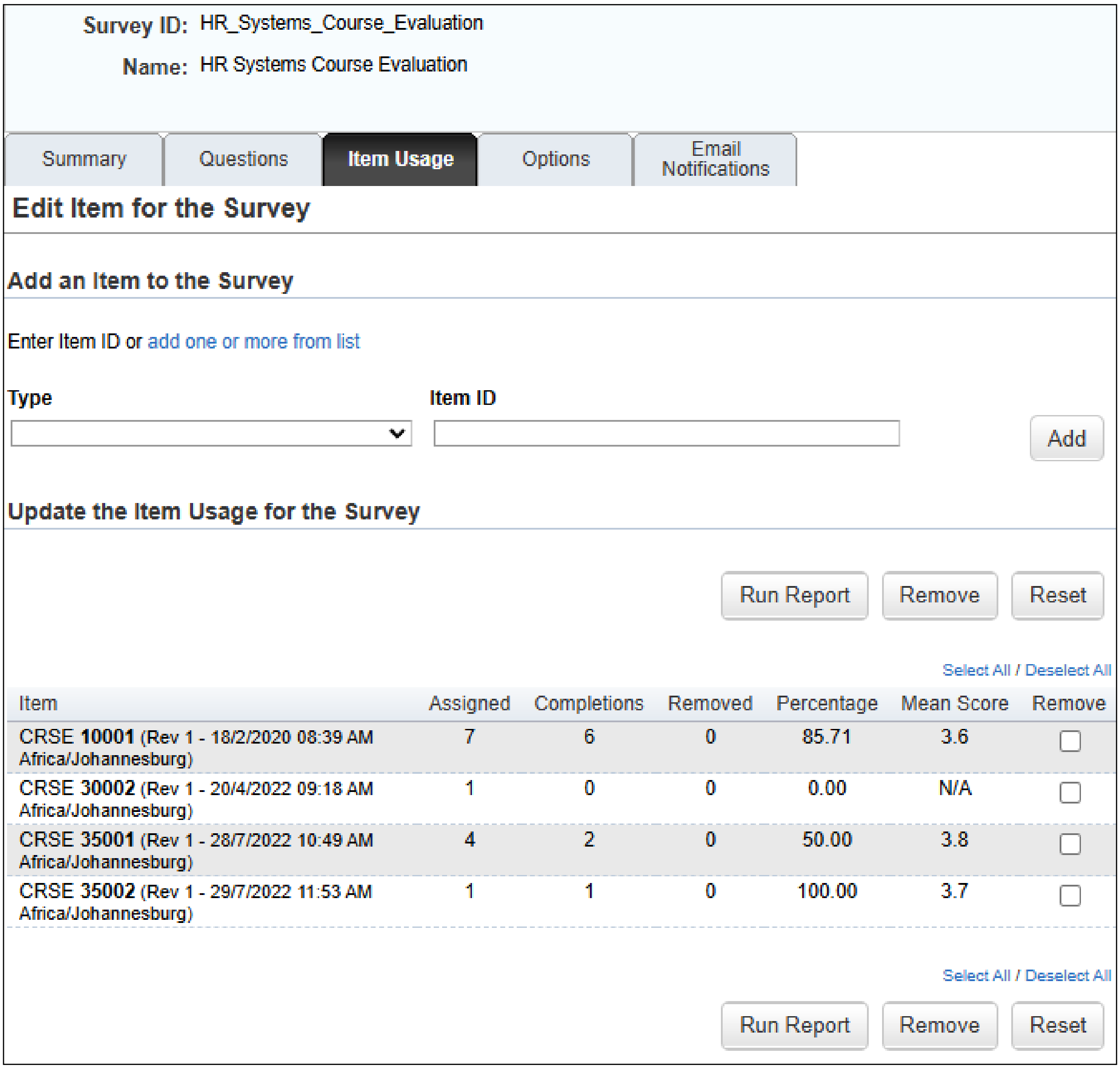
4. The *Surveys* page reappears, displaying the selected survey.



- Click the Item Usage tab.

Viewing submitted survey data (continued)

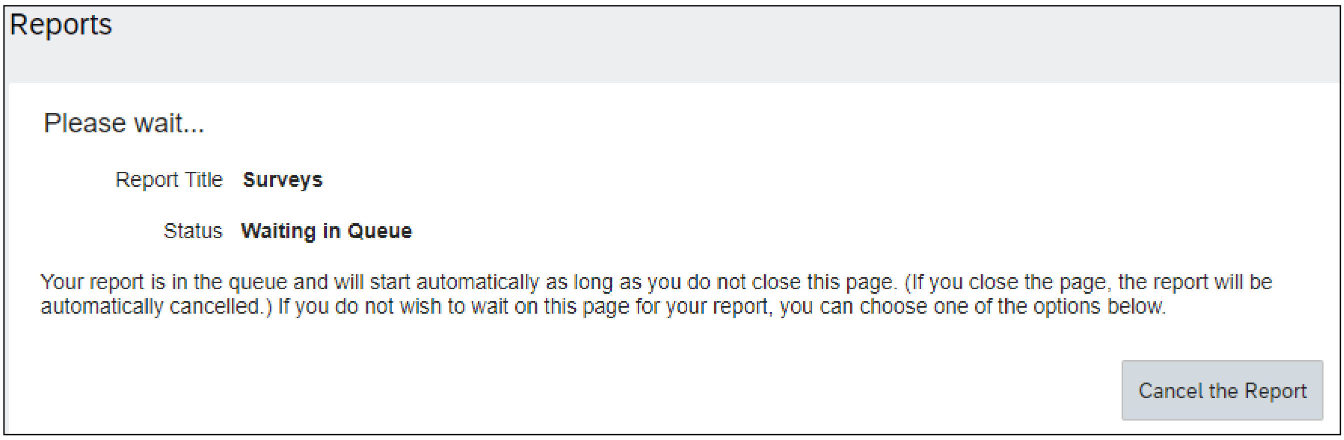
5. The *Item Usage* tab appears.



Item	Assigned	Completions	Removed	Percentage	Mean Score	Remove
CRSE **10001** (Rev 1 - 18/2/2020 08:39 AM Africa/Johannesburg)	7	6	0	85.71	3.6	☐
CRSE **30002** (Rev 1 - 20/4/2022 09:18 AM Africa/Johannesburg)	1	0	0	0.00	N/A	☐
CRSE **35001** (Rev 1 - 28/7/2022 10:49 AM Africa/Johannesburg)	4	2	0	50.00	3.8	☐
CRSE **35002** (Rev 1 - 29/7/2022 11:53 AM Africa/Johannesburg)	1	1	0	100.00	3.7	☐

- For each learning item the table shows the number of learners assigned the survey, the number who completed the survey and the percentage of assigned surveys completed. If a survey includes rating scale questions that use the same rating scale, the mean score of all ratings will be displayed.
- Click Run Report.

6. The *Reports* page appears in a new browser tab.



Viewing submitted survey data (continued)

- When the report has successfully run, it will replace the *Reports* page.

SAP SuccessFactors

Surveys

Survey:	**HR Course Feedback Survey (Course_Feedback_HR)**
Mean Score:	**N/A**
Total Surveys:	**1 / 1**
Date Range:	**N/A - N/A**

Item: Emotional Intelligence, (CRSE, 14002, 7/7/2020 02:51 PM Africa/Johannesburg)

Classes: 1 **Mean Score:** N/A **Total Surveys:** 1 / 1

Page 1: **About the course**

Resource Type: None

Mean: 4

Question 1: Did the course meet your expectations? If no, please provide more information by adding a comment.

Answer		
4 - Definitely	1	100%

Total Respondents: 1

Question 2: Any additional comments or suggestions for improvement?

Answer

Excellent course, can't wait to put this into practice.

Total Respondents: 1

Page 2: **About the trainer**

Resource Type: Primary Instructor

Mean: 3.3

Question 1: The trainer's ability to present course materials in a clear manner that helped understanding was:

Primary Instructor	**Answer**		
Ms Trainer	3 - Good	1	100%

Total Respondents: 1

Question 2: The trainer's overall teaching performance was:

Primary Instructor	**Answer**		
Ms Trainer	3 - Good	1	100%

Total Respondents: 1

Question 3: The trainer's ability to create a welcoming and inclusive environment was:

Primary Instructor	**Answer**		
Ms Trainer	4 - Excellent	1	100%

Total Respondents: 1

- The report can be printed to PDF or copied and pasted into a Microsoft Word document using Ctrl+A on your keyboard to select everything and then pasting into the document.
- When finished reviewing the statistics, close the new browser tab to return to the *Surveys* page.

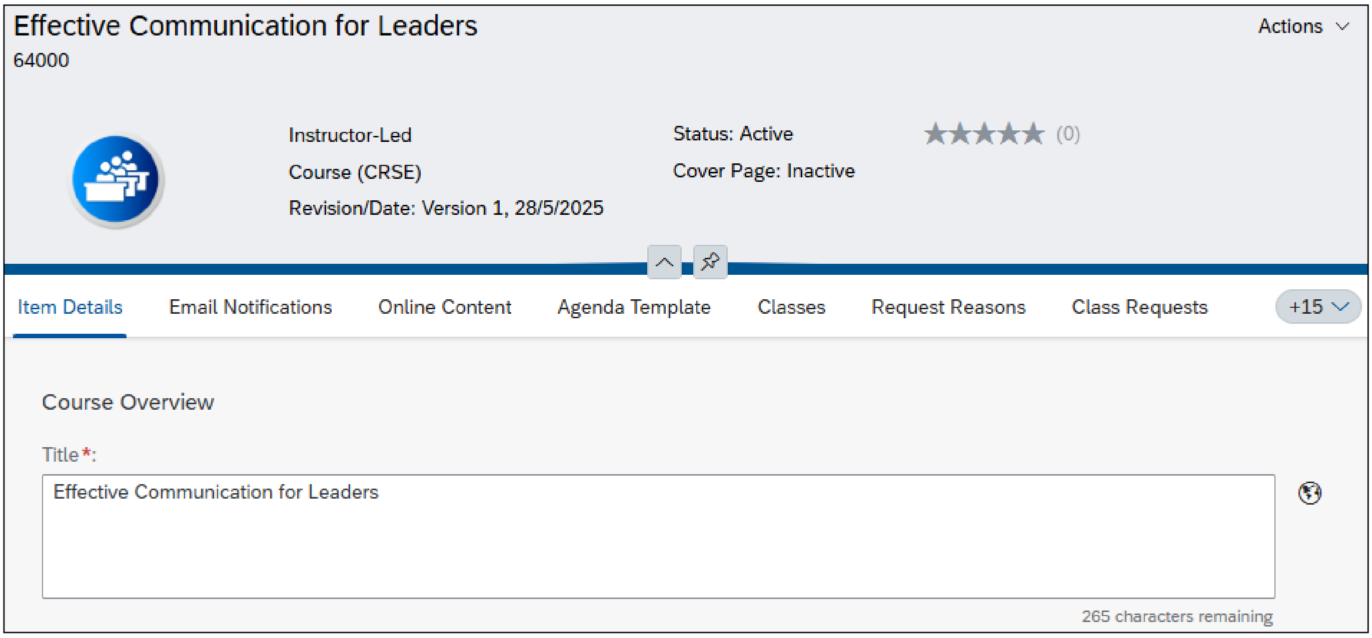
Items: Viewing class requests

Background

If the learning item has been set up to allow requests, learners can submit a request for a new class. This may occur if they are unable to attend any of the existing scheduled classes.

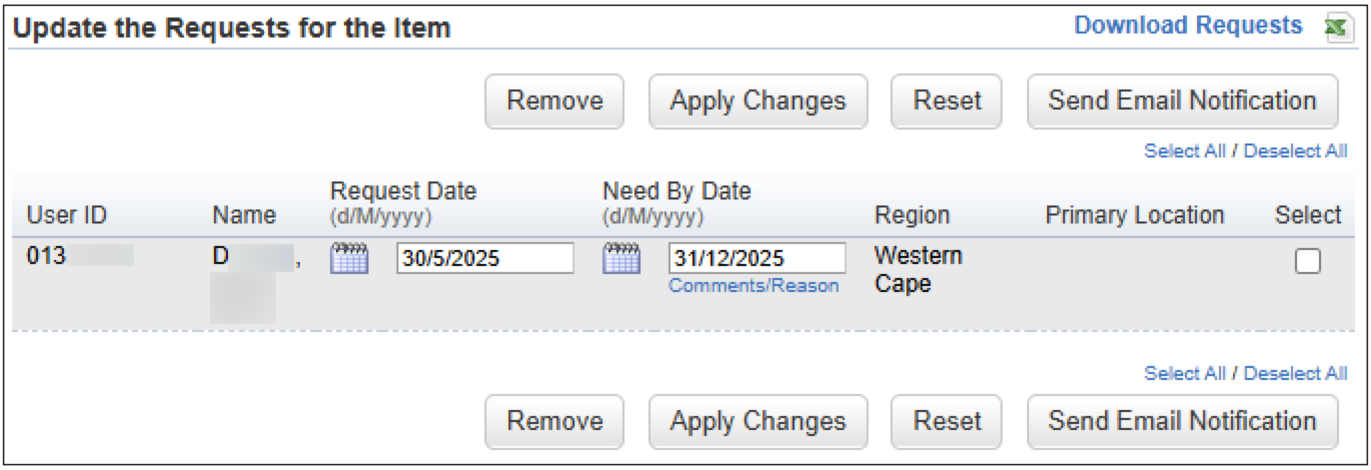
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate learning item.



- In the item menu, click *Class Requests* or select it from the dropdown menu on the right.

3. The *Class Requests* page appears, displaying any requests in the *Update the Requests for the Item* section.



- Click Comments/Reason to display any comments the learner may have included.
- Click *Download Requests* to generate a .csv file that can be viewed in Microsoft Excel.
- To remove old requests, select the appropriate check box in the *Select* column and click Remove.

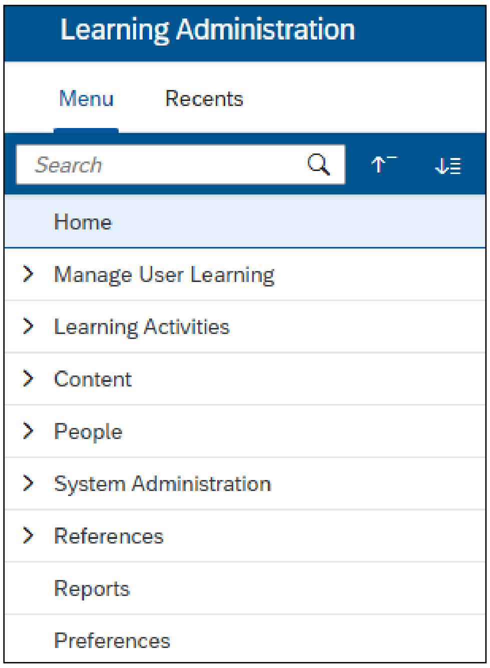
Creating an instructor

Background

An instructor is first added to the pool of instructors and then later connected to a scheduled class or item.

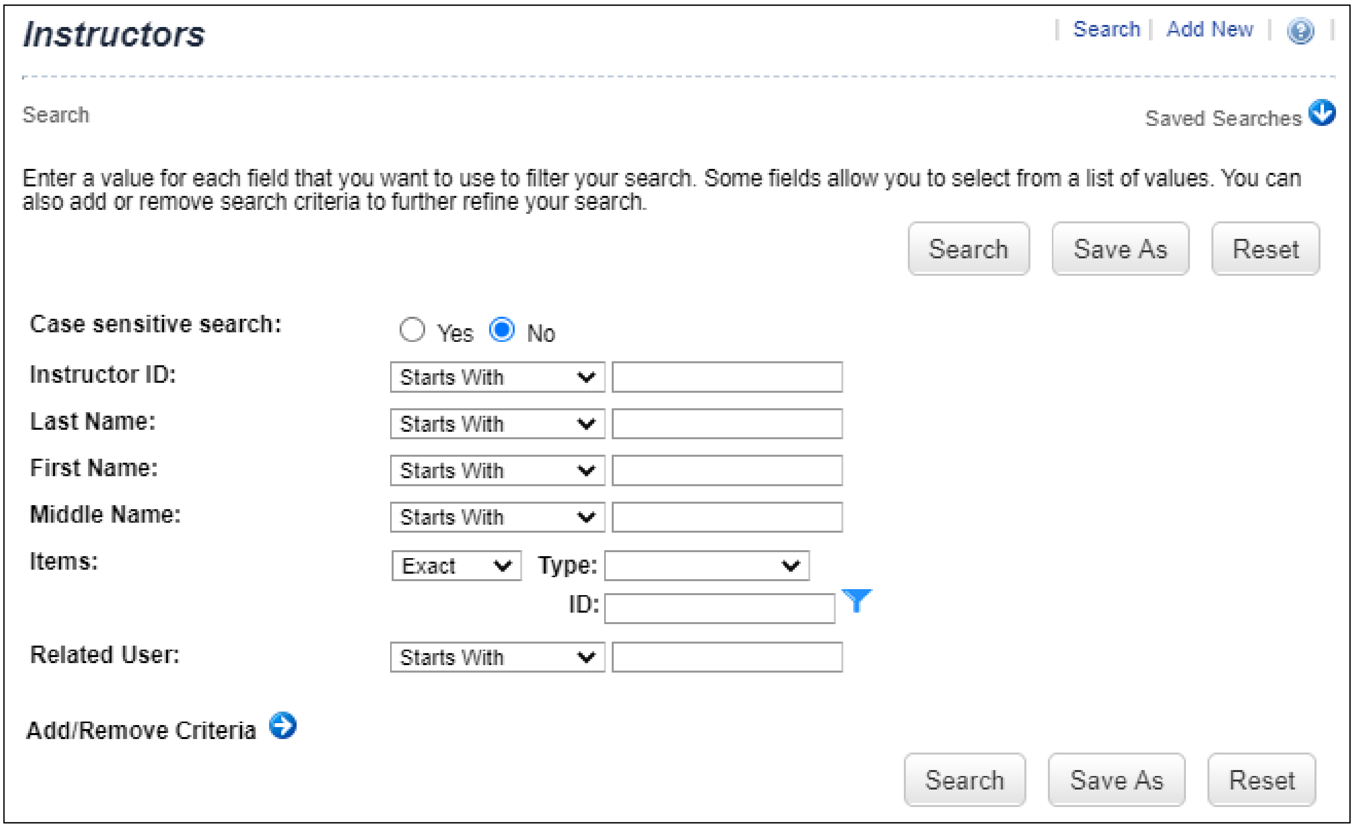
Procedure

1. [Log in to SuccessFactors and access the *Learning Administration* page](#).



- In the *Menu*, choose *People* > *Instructors*.

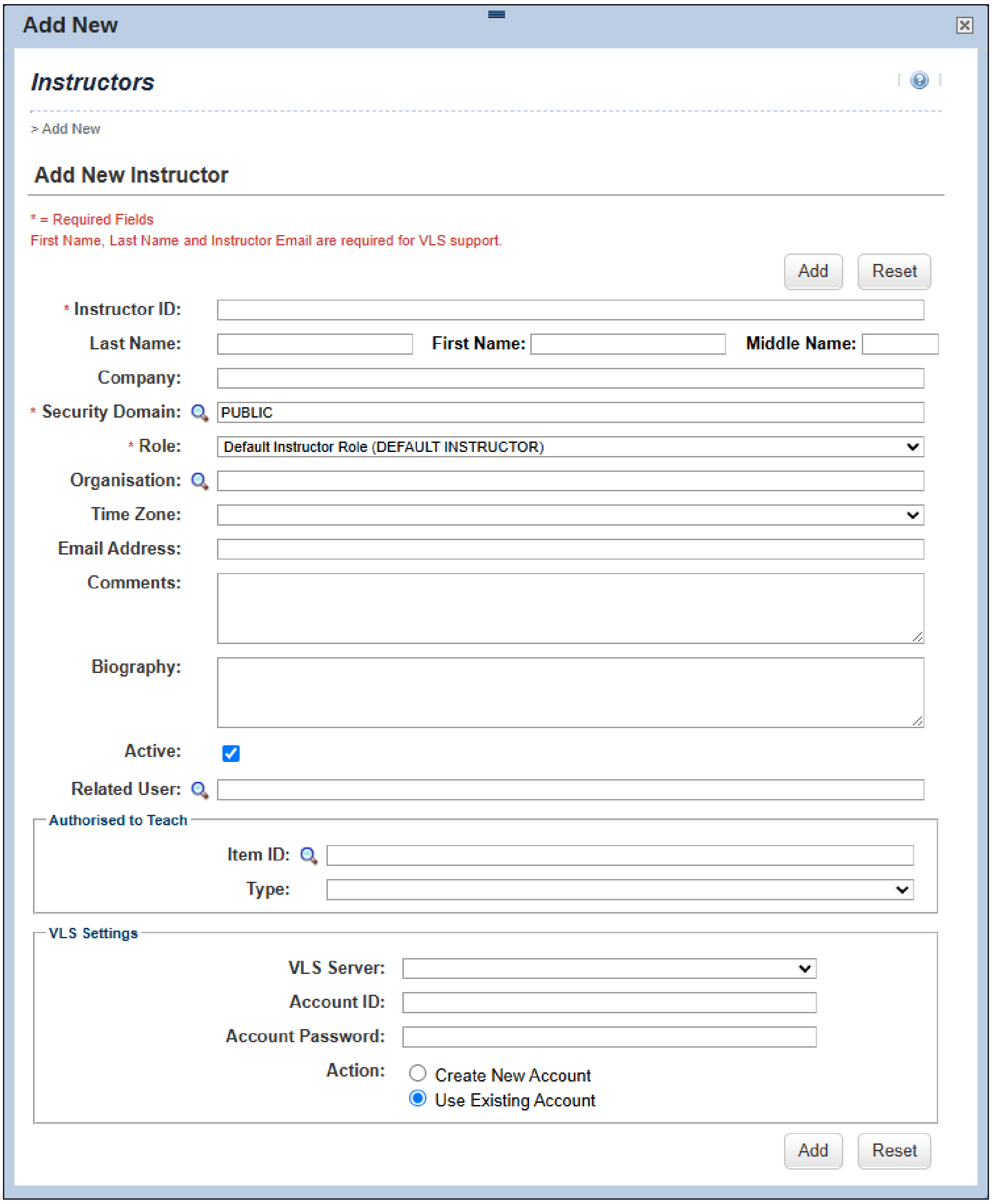
2. The *Instructors* page appears.



- Click Add New.

Creating an instructor (continued)

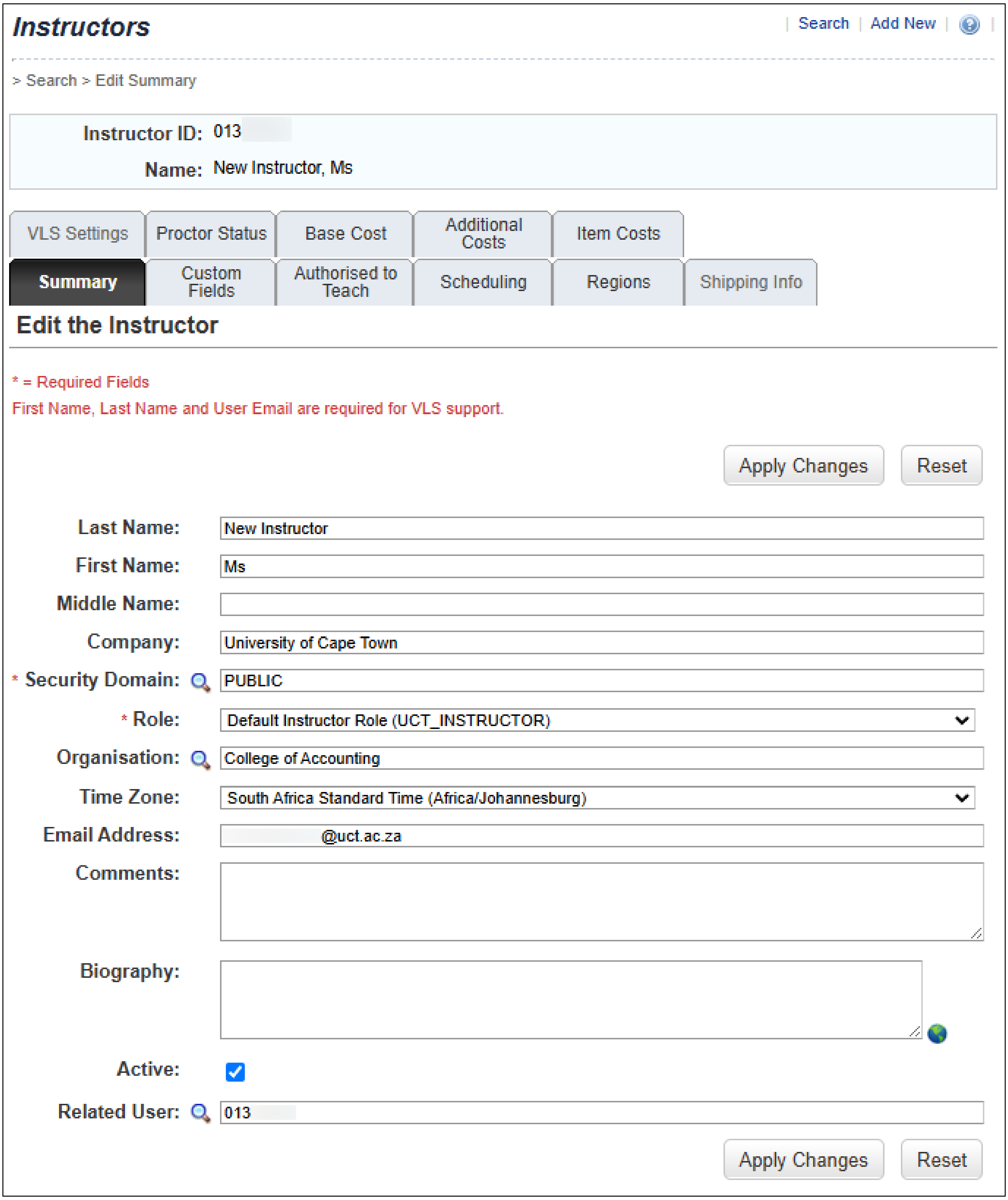
3. The *Add New* dialogue box appears.



- In the *Instructor ID* field enter the staff number (including leading zero) e.g. 01234567 or if an external instructor in the format Ext_<capital initial><surname starting with a capital letter> e.g. Ext_BDlamini.
- In the *Company* field, enter *University of Cape Town* or if an external instructor, the company name.
- In the *Role* field, select *UCT Instructor Role*.
- In the *Organisation* field, click to search for the staff member's UCT organisational unit using the *Description* field. If an external instructor, leave this field blank.
- In the *Time Zone* field, select *South Africa Standard Time (Africa/Johannesburg)*.
- Enter the instructor's *Email Address*.
- In the *Related User* field, enter the staff number (including leading zero). If an external instructor, leave this field blank.
- Click Add.

Creating an instructor (continued)

4. The *Instructors* page reappears, displaying the new instructor's information.



- If the *Last Name* and *First Name* fields have not defaulted, enter the applicable information.
- Click Apply Changes.

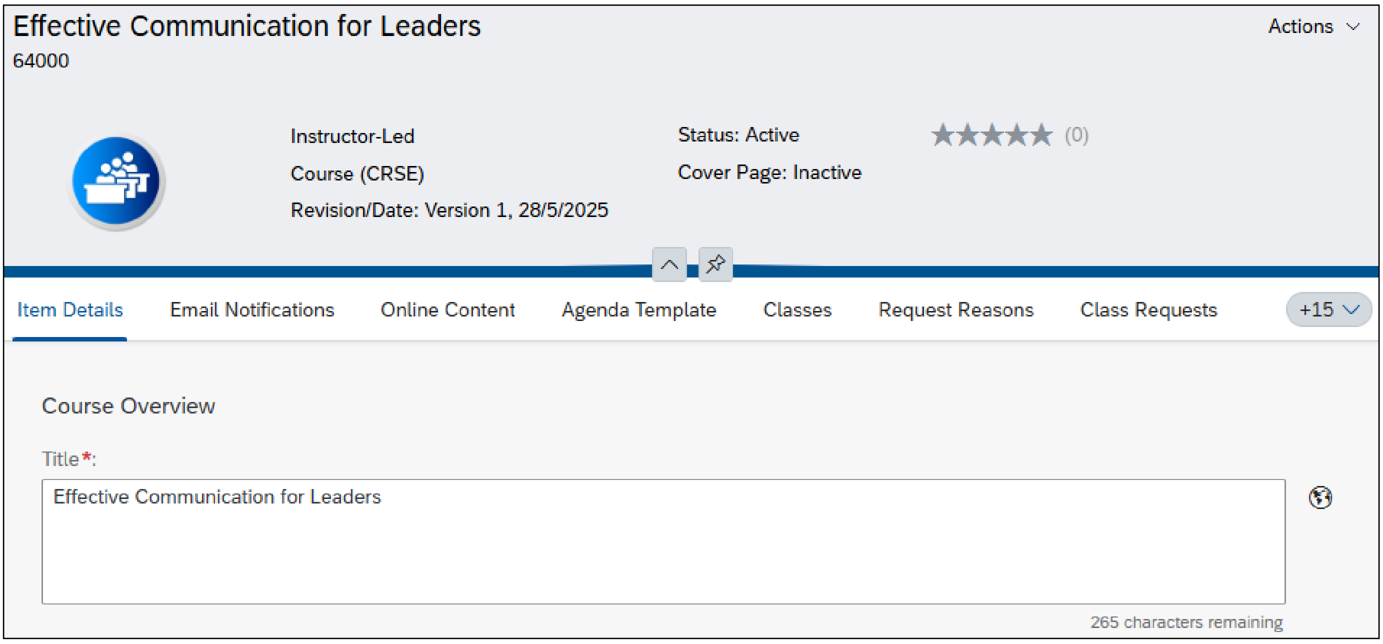
Adding an authorised instructor to an item

Background

Adding authorised instructors to an item will limit the choice of instructor when creating a class for that item. The instructor must be created and part of the instructor pool, see: Creating an instructor.

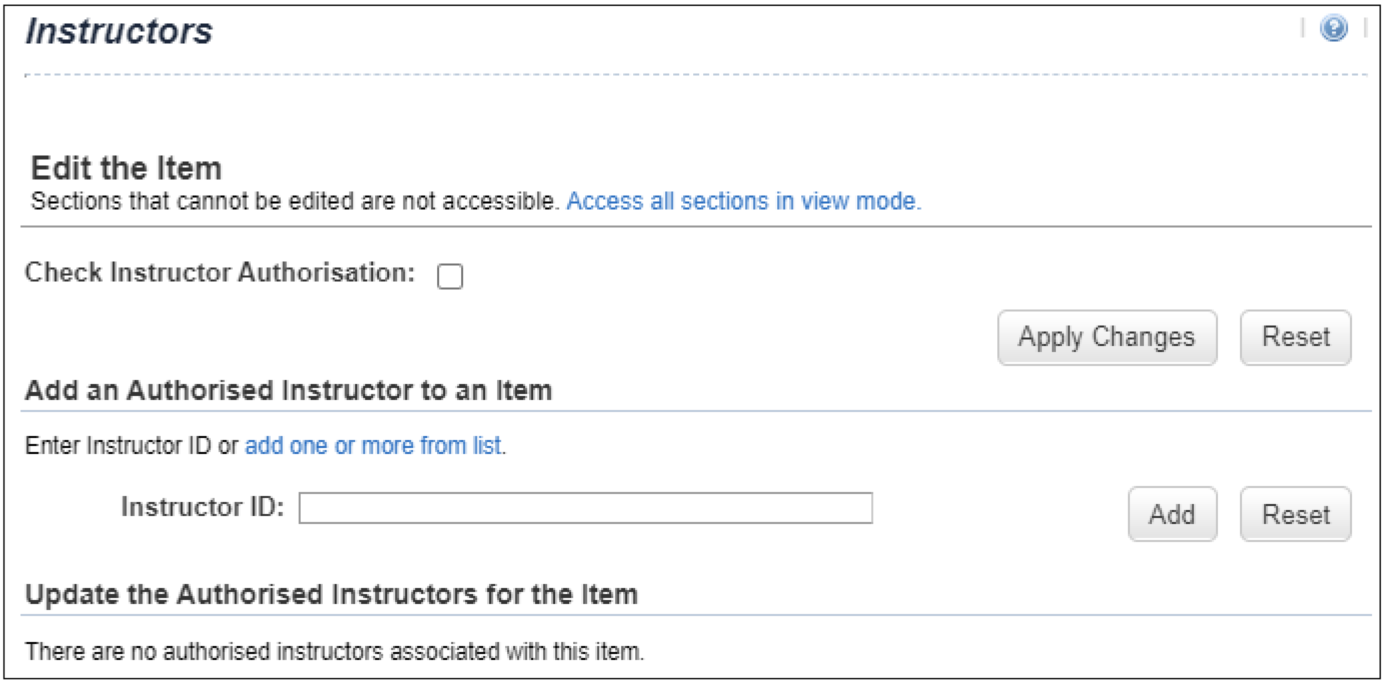
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate learning item.



- In the item menu, click *Instructor* or select it from the dropdown menu on the right.

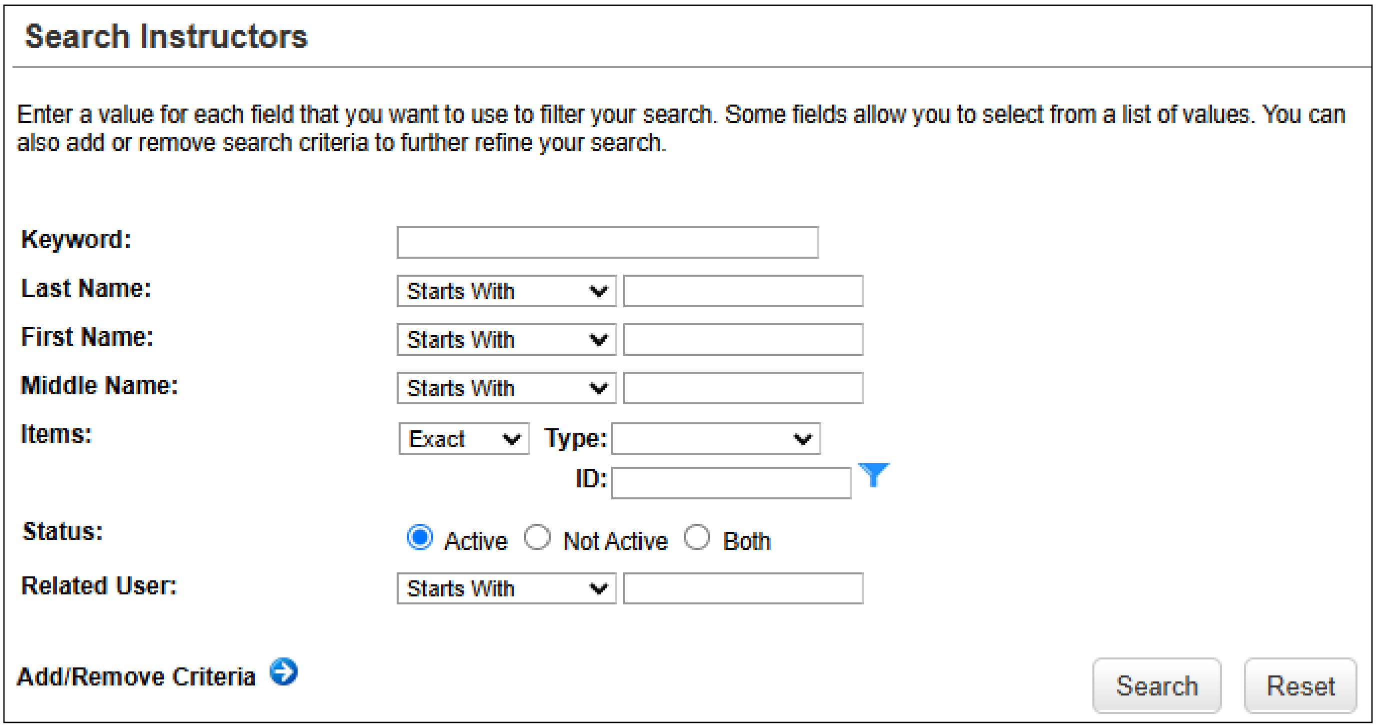
3. The *Instructors* page appears.



- In the *Add an Authorised Instructor to an item* section, click add one or more from list.

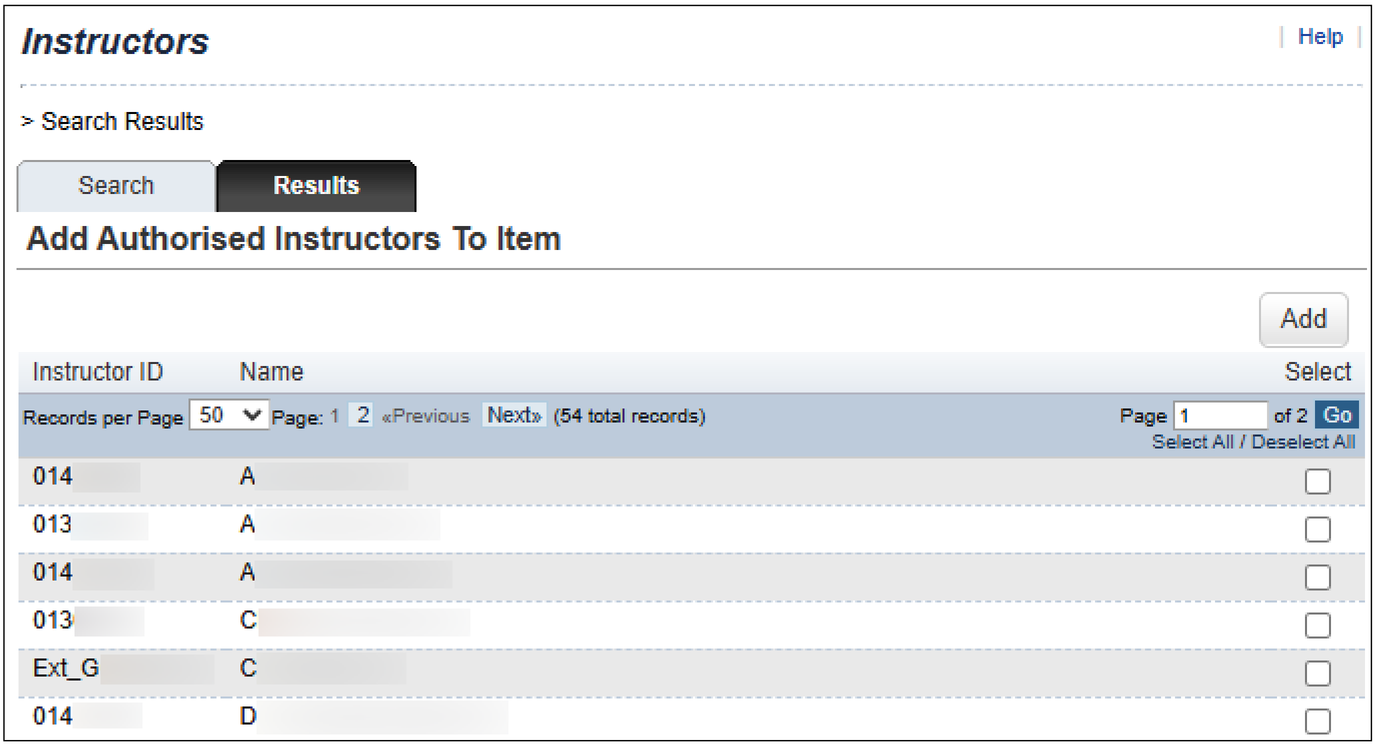
Adding an authorised instructor to an item (continued)

4. The *Search Instructors* page appears.



- Click Search.

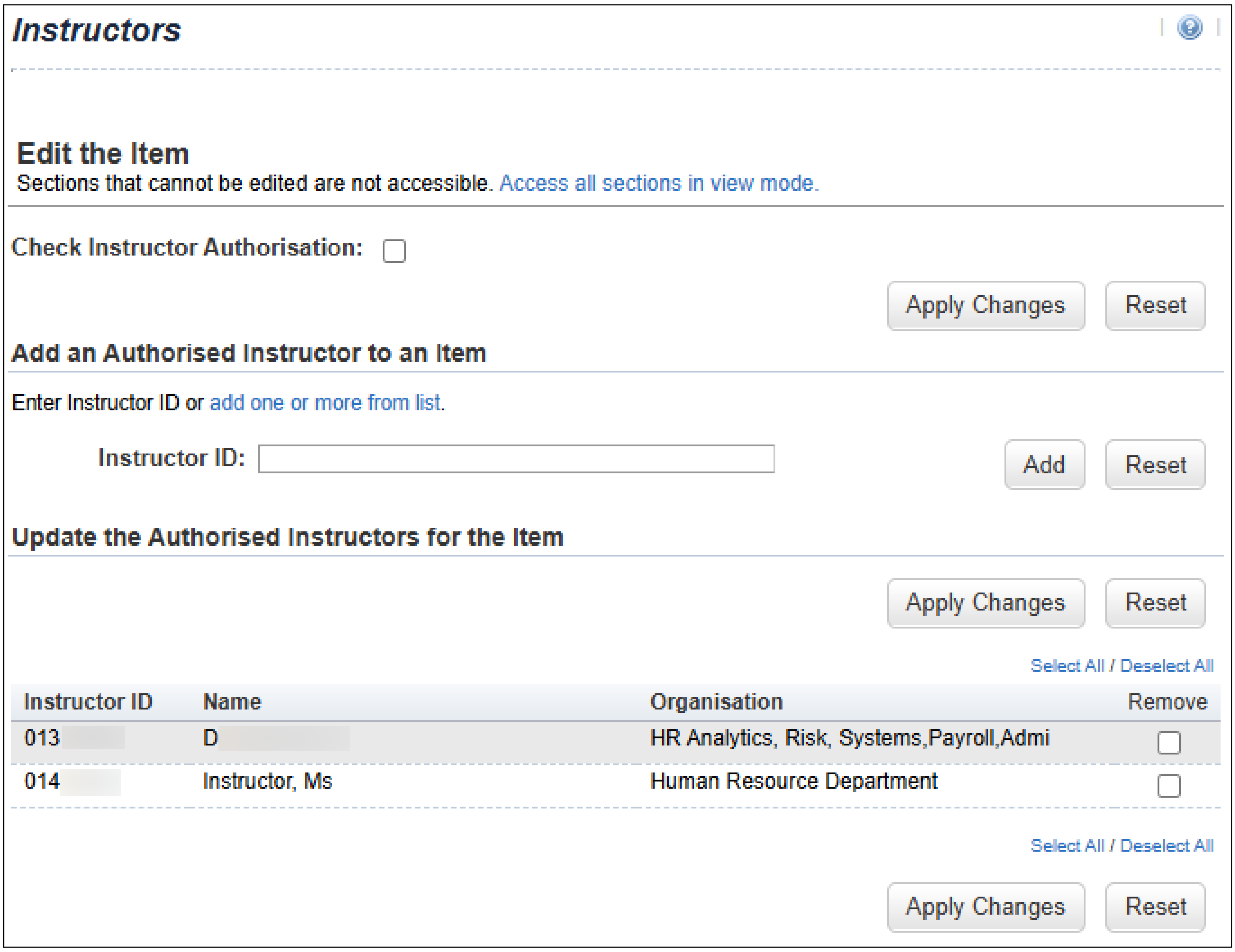
5. The *Instructors* page appears, listing all instructors.



- To view additional results, either change the number of *Records per Page* using the dropdown arrow or click Next».
- Select the check box in the *Select* column for one or more instructors.
- Click Add.

Adding an authorised instructor to an item (continued)

6. The *Instructors* page reappears, listing the new instructor(s) in the *Update the Authorised instructors for the item* section.

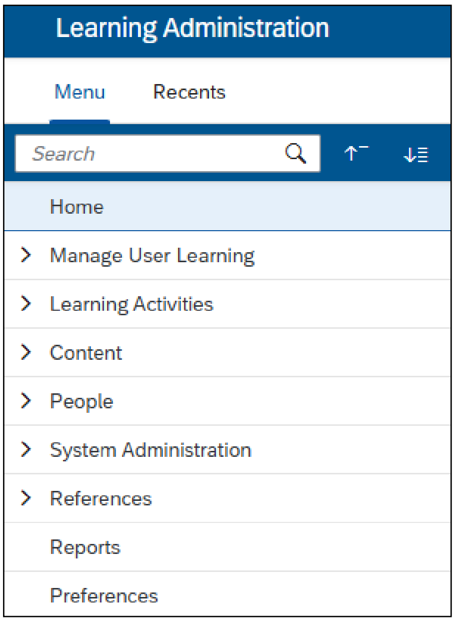


- In the *Edit the Item* section, select the *Check Instructor Authorisation* check box. This ensures that classes for this item will only be able to use the authorised instructors.
- Click Apply Changes in the *Edit the Item* section

Searching for an item

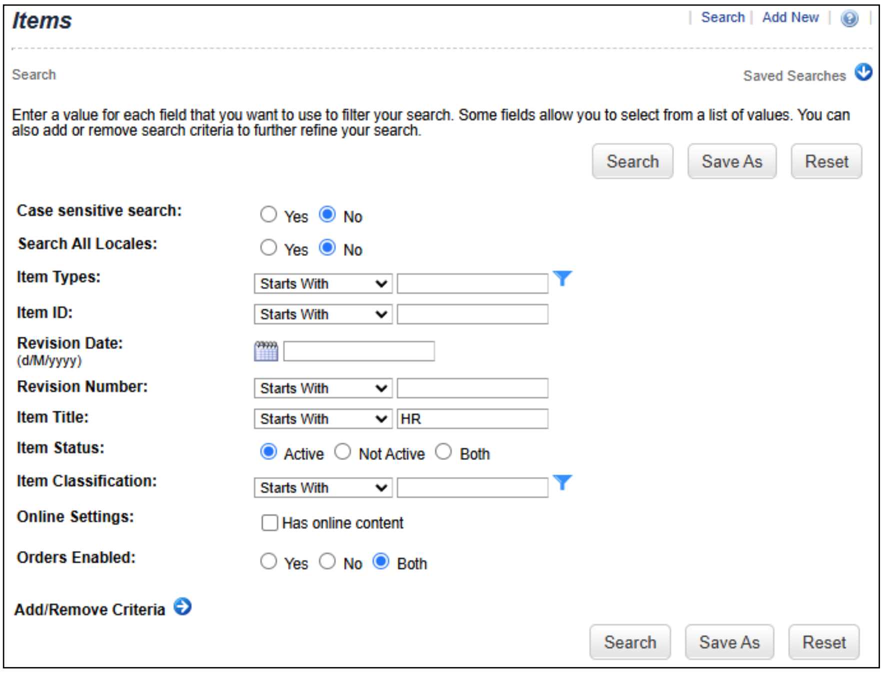
Procedure

1. [Log in to SuccessFactors and access the *Learning Administration* page](#).



- Choose *Learning Activities* > *Items*. **Note:** Items you've recently accessed can be found in *Recents*.

2. The *Items* page appears.
If you have previously saved a search, see: [Searching for an item using a saved search](#).



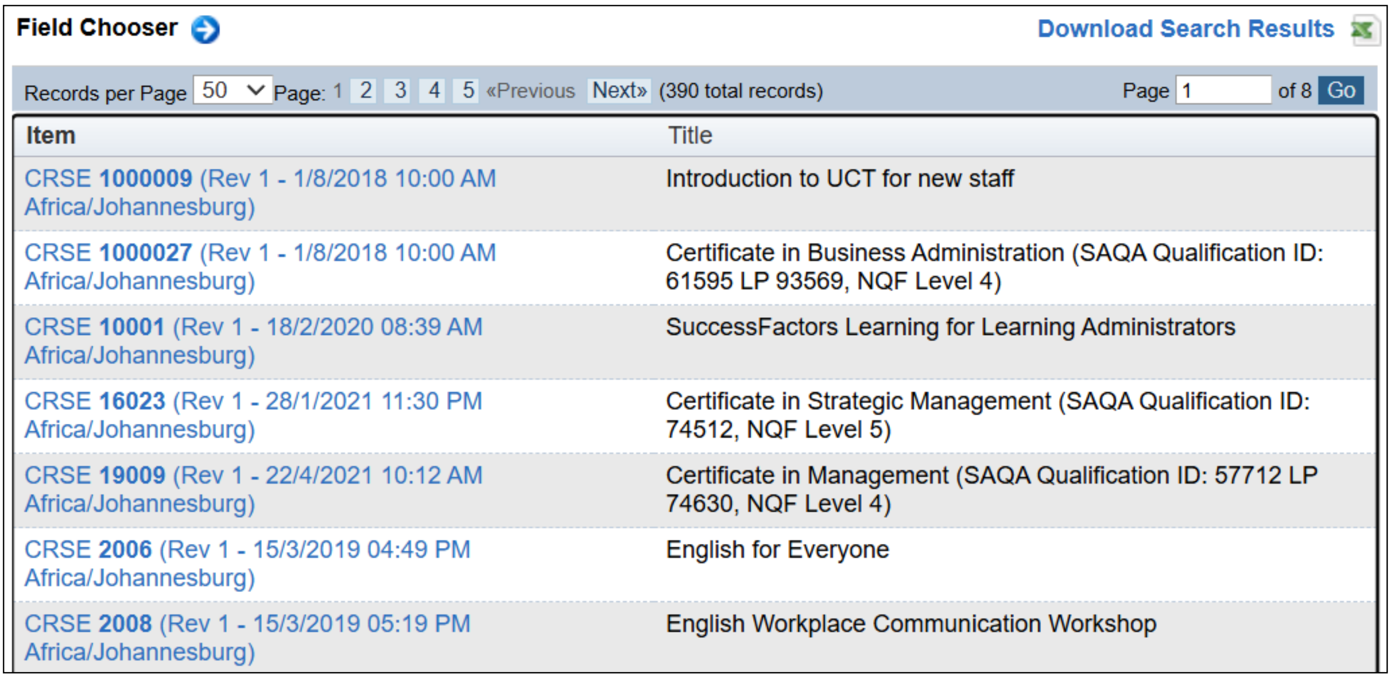
- To find your item(s), enter search criteria in any of the available fields e.g. *Item Title*.
- To add additional search fields (e.g. *Security Domains*, *UCT area that created the item*), click alongside *Add/Remove Criteria*.
  - In the *Search Criteria* dialogue box, select the applicable fields using the check boxes and click 

.
- The *Security Domains* or *UCT area that created the item* fields can be used to find the items for your area but will only work if the learning item was linked to a security domain or UCT area. See: [Using item search filters for security domain and/or UCT area](#).

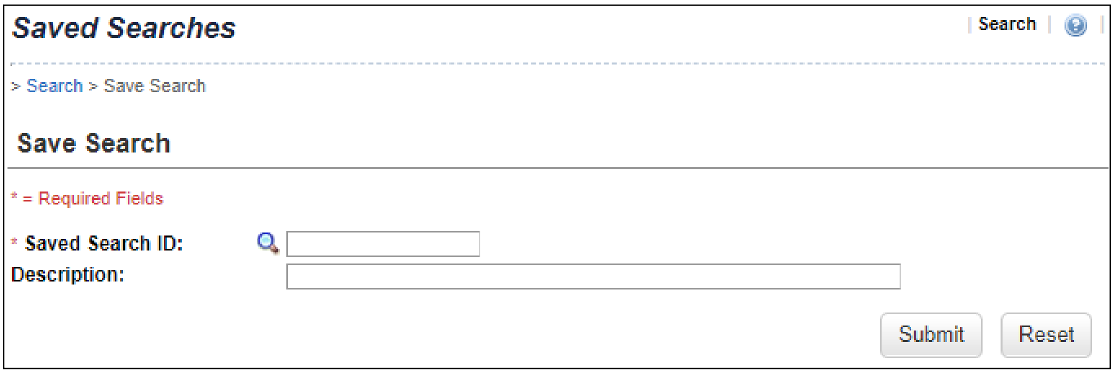
Searching for an item (continued)

- If the item you're searching for is not currently active, ensure you make the appropriate selection for *Item Status*.
- Click Search. **Note**: If no search criteria were entered, all active items that you have authorisation to view will appear in the search results.

3. The search results appear at the bottom of the *Items* page.



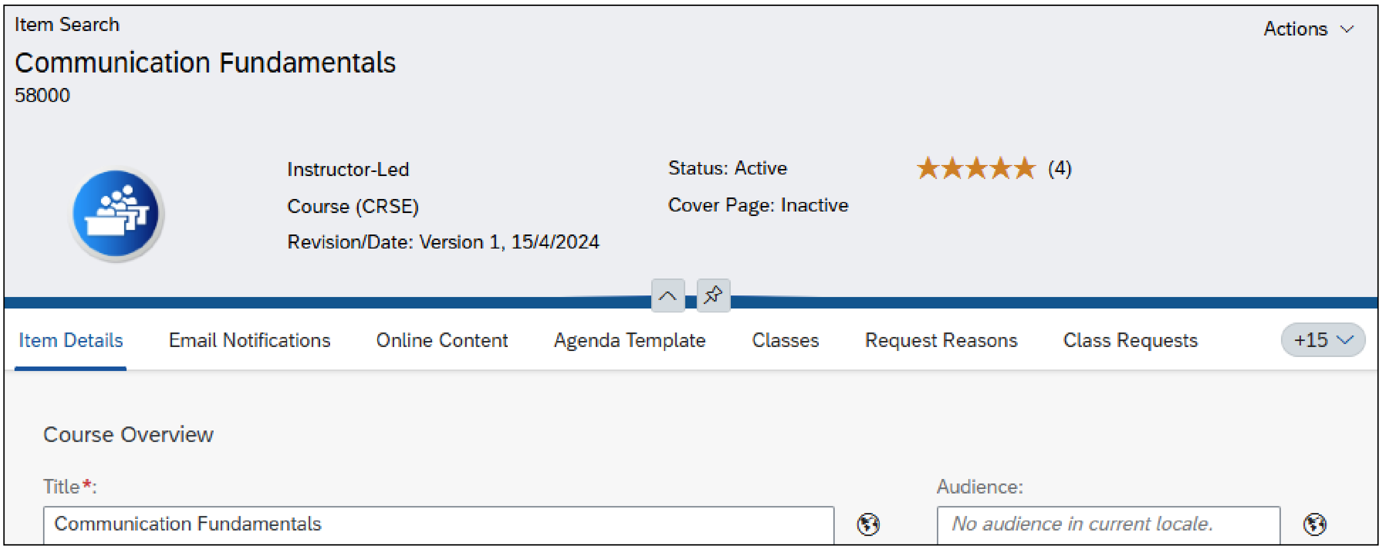
- To view more search results, either change the number of *Records per Page* using the dropdown arrow or click Next».
- The search results can be exported to an Excel spreadsheet, providing a useful overview of the selected items. Click Download Search Results to download a .csv file.
- To save the search to use again, click Save As.
  - The *Saved Searches* page appears.



  - Enter the *Saved Search ID* name e.g. Staff_Learning_Centre_Area, HR_Security_Domain.
  - Enter a *Description* e.g. Active learning items in the Staff Learning Centre area.
  - Click Submit.
- Select the appropriate item to open by clicking the link in the *Item* column.

Searching for an item (continued)

4. The *Item Details* page appears.

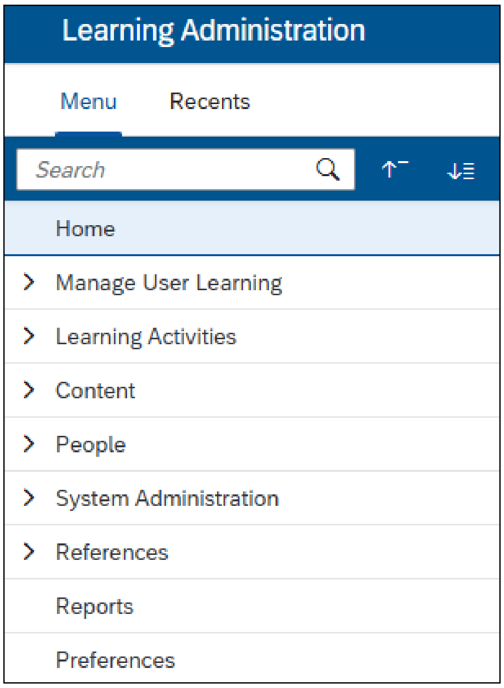


- To select a different item from the previous search results, click Item Search (top left, above item title).

Searching for an item using a saved search

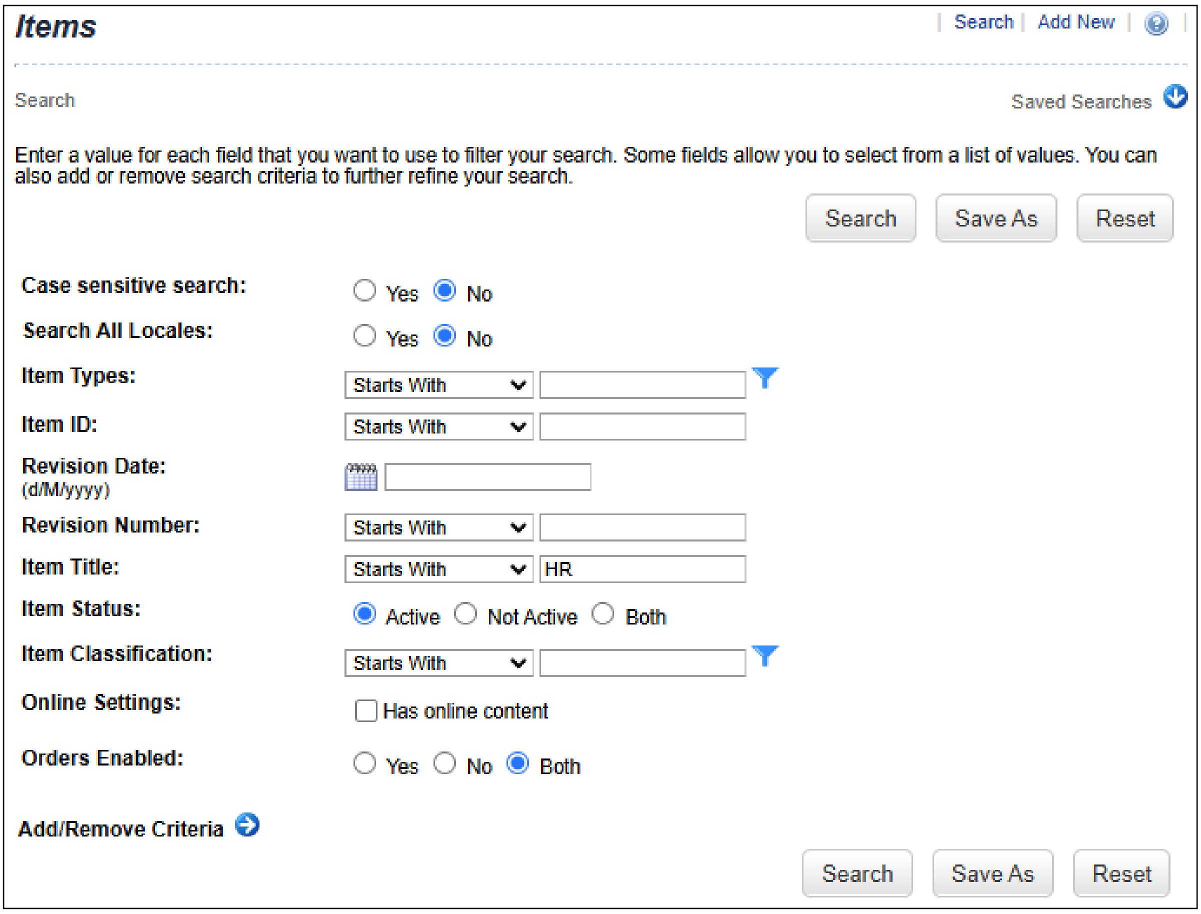
Procedure

1. [Log in to SuccessFactors and access the *Learning Administration* page](#).



- Choose *Learning Activities* > *Items*. **Note:** Items you've recently accessed can be found in *Recents*.

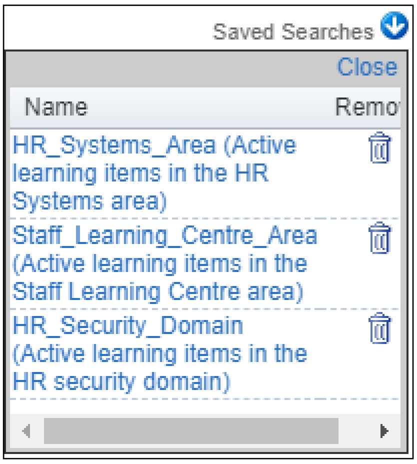
2. The *Items* page appears.



- Click alongside *Saved Searches* (top right).

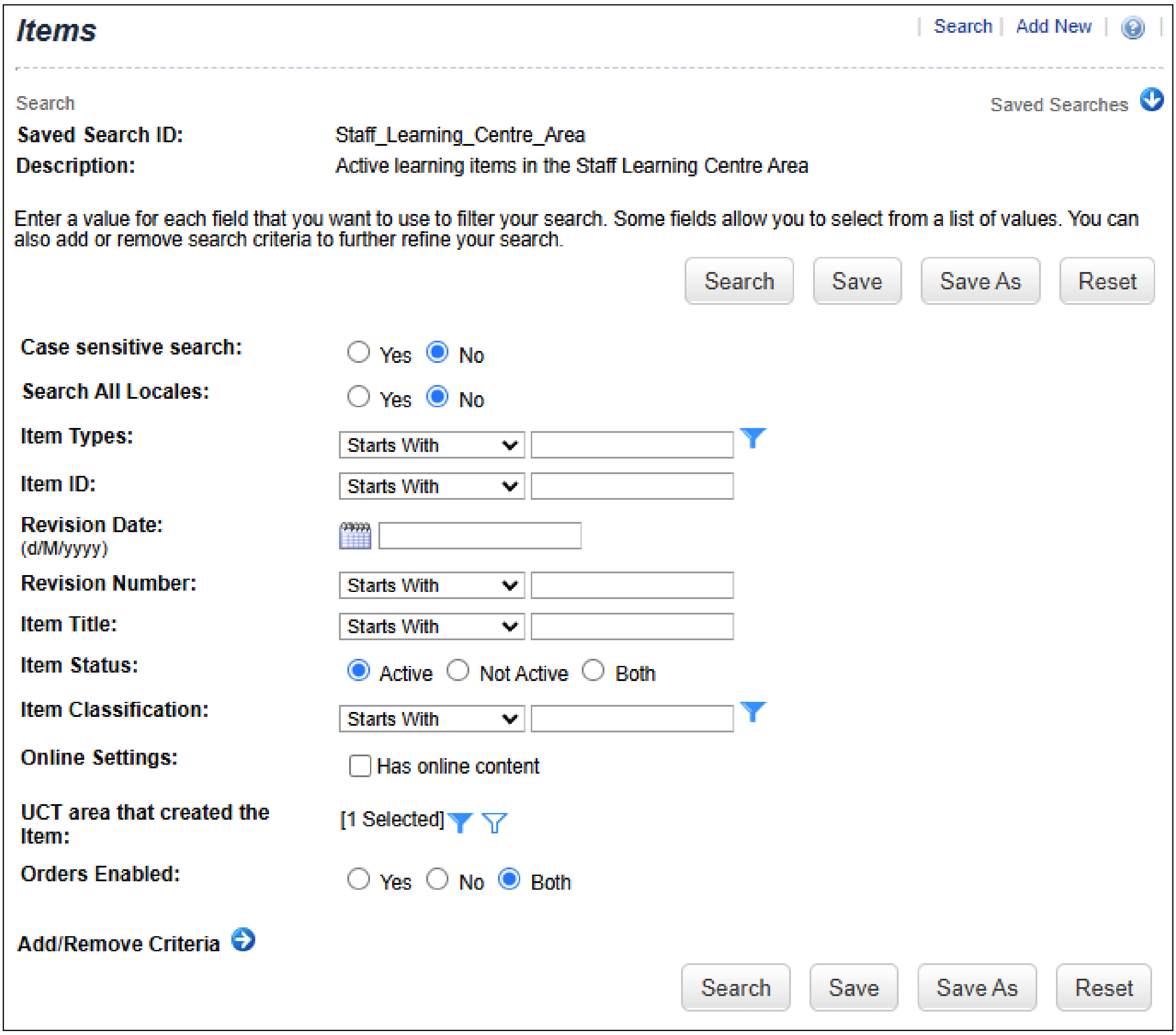
Searching for an item using a saved search (continued)

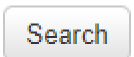
3. A dialogue box appears, displaying all your previously saved searches.



- Select the appropriate search by clicking the hyperlink in the *Name* column.

4. The *Items* page reappears, displaying the name and description of the selected search at the top of the page. The selection criteria and/or filters from the saved search will appear on the page.



- Click 

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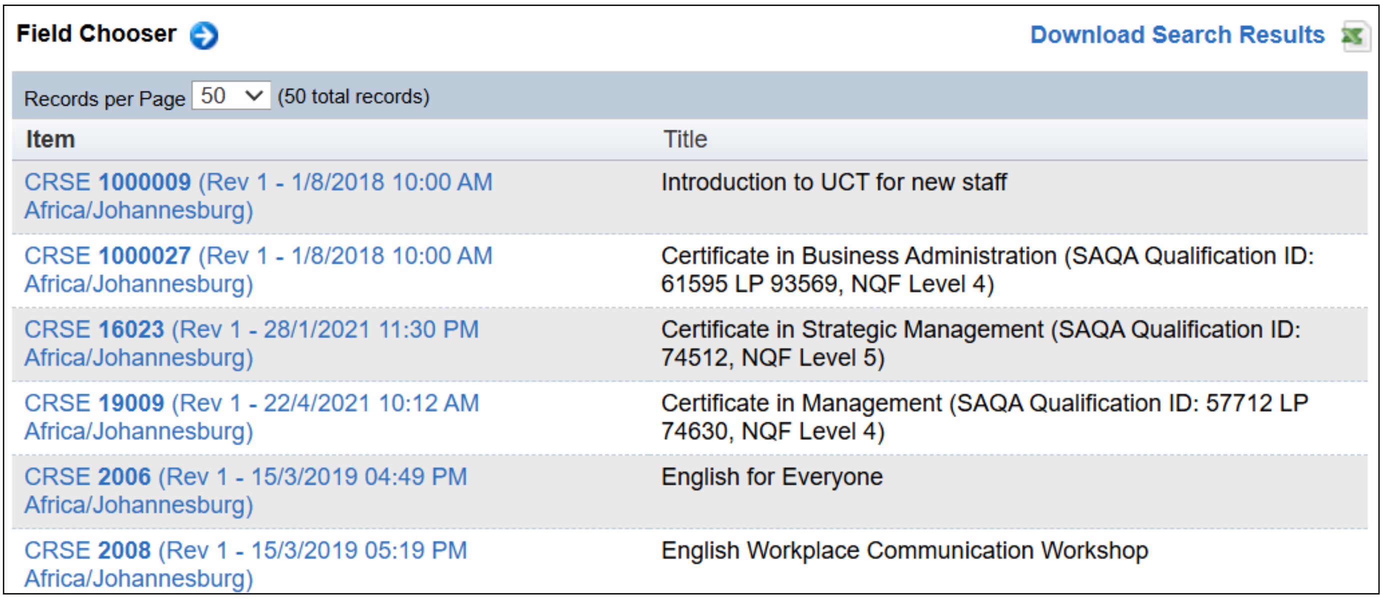
Searching for an item using a saved search (continued)

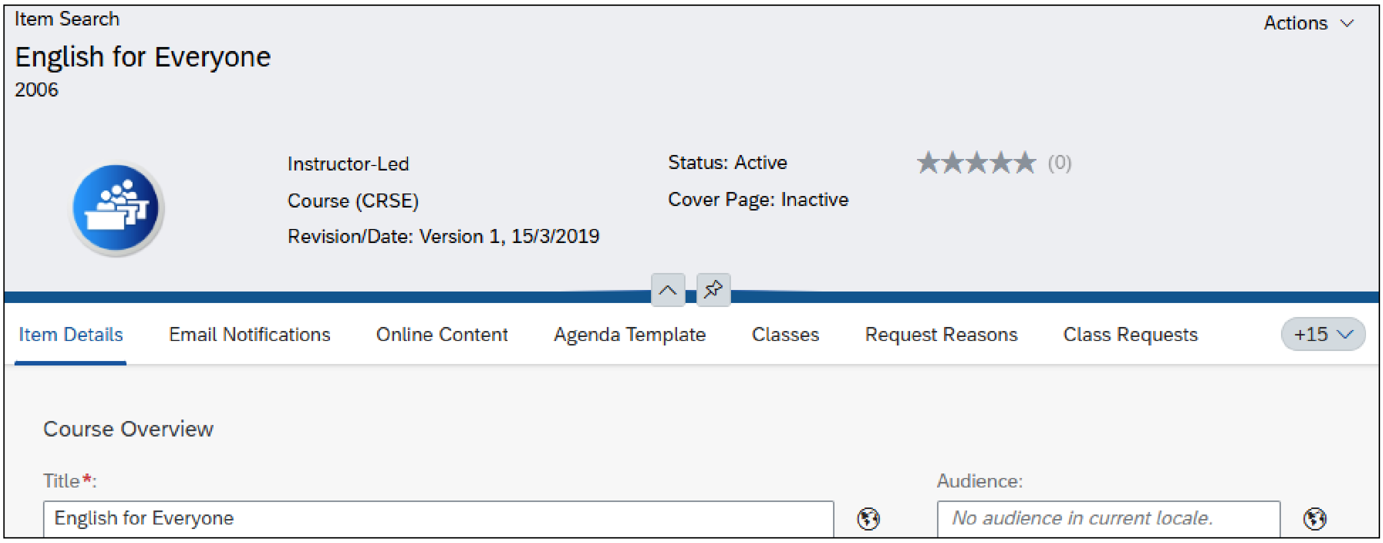
5. The search results appear at the bottom of the *Items* page.



Item	Title
CRSE **1000009** (Rev 1 - 1/8/2018 10:00 AM Africa/Johannesburg)	Introduction to UCT for new staff
CRSE **1000027** (Rev 1 - 1/8/2018 10:00 AM Africa/Johannesburg)	Certificate in Business Administration (SAQA Qualification ID: 61595 LP 93569, NQF Level 4)
CRSE **16023** (Rev 1 - 28/1/2021 11:30 PM Africa/Johannesburg)	Certificate in Strategic Management (SAQA Qualification ID: 74512, NQF Level 5)
CRSE **19009** (Rev 1 - 22/4/2021 10:12 AM Africa/Johannesburg)	Certificate in Management (SAQA Qualification ID: 57712 LP 74630, NQF Level 4)
CRSE **2006** (Rev 1 - 15/3/2019 04:49 PM Africa/Johannesburg)	English for Everyone
CRSE **2008** (Rev 1 - 15/3/2019 05:19 PM Africa/Johannesburg)	English Workplace Communication Workshop

- To view more search results, either change the number of *Records per Page* using the dropdown arrow or click Next».
- The search results can be exported to an Excel spreadsheet, providing a useful overview of the selected items. Click Download Search Results to download a .csv file.
- Select the appropriate item by clicking the link in the *Item* column.

6. The *Item Search* page appears, displaying the selected item.



- To select a different item from the previous search results, click Item Search (top left, above item title).

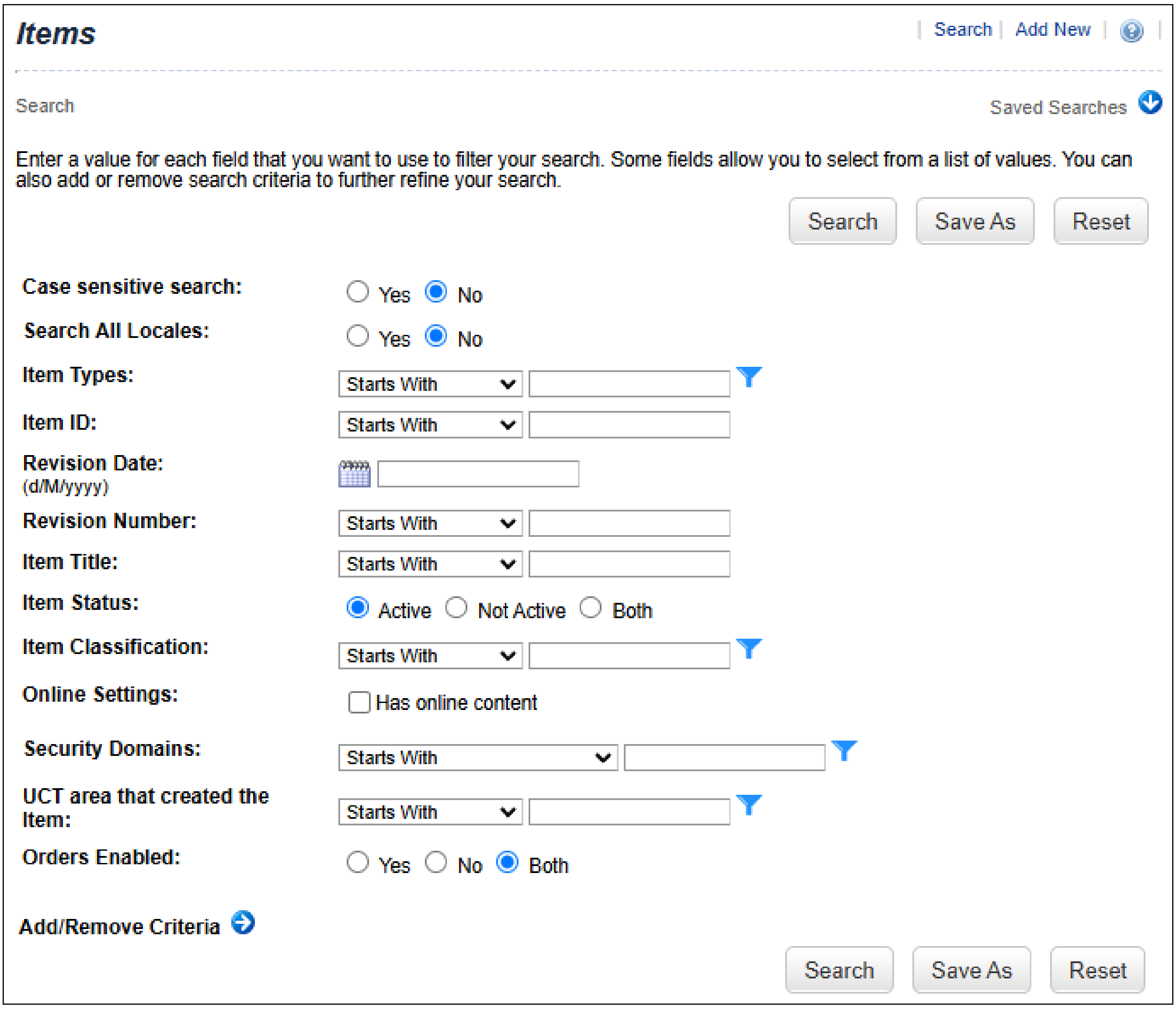
Using search filters for security domain and/or UCT area

Background

When searching for an item, the security domain and UCT area can be used to find all learning items for an area or section.

Procedure

1. [Log in to SuccessFactors and access the *Learning Administration* page](#).
   - Choose *Learning Activities* > *Items*.
2. The *Items* page appears.
   - Click alongside *Add/Remove Criteria* to add the *Security Domains* and *UCT area that created the item* fields.

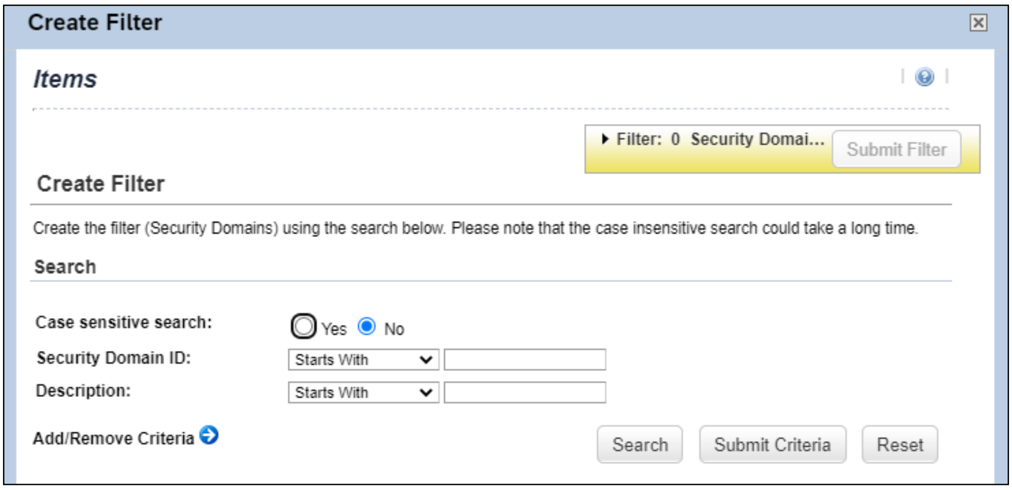


Filter by security domain (or see [filter by UCT area that created the item](#))

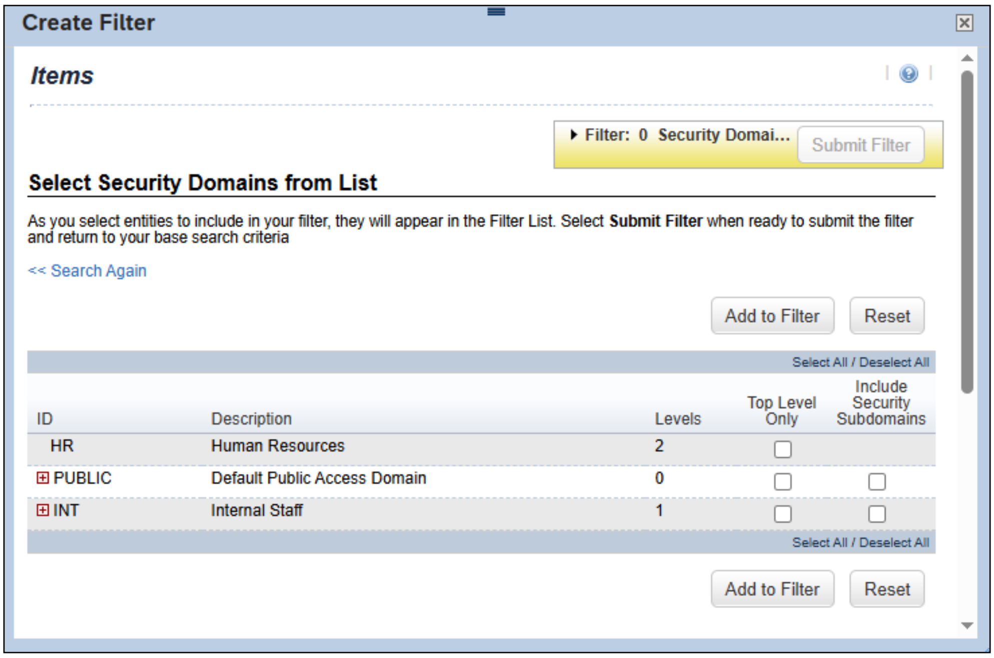
- Click alongside the *Security Domains* field to select a domain for the filter.

Using search filters for security domain and/or UCT area (cont)

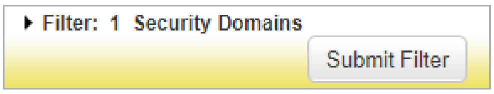
- The *Create Filter* dialogue box appears.



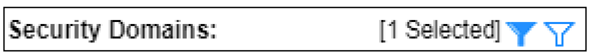
- Click Search.
- The *Create Filter* dialogue box reappears, displaying all the security domains you have authorisation to use.



- Select the appropriate domain (e.g. Human Resources) using the check box in the *Top Level Only* column.
- Click Add to Filter.
- The filter section in the top right of the dialogue box indicates the number of filters selected



- Click Submit Filter.
- The *Items* page reappears with the selected filter applied.

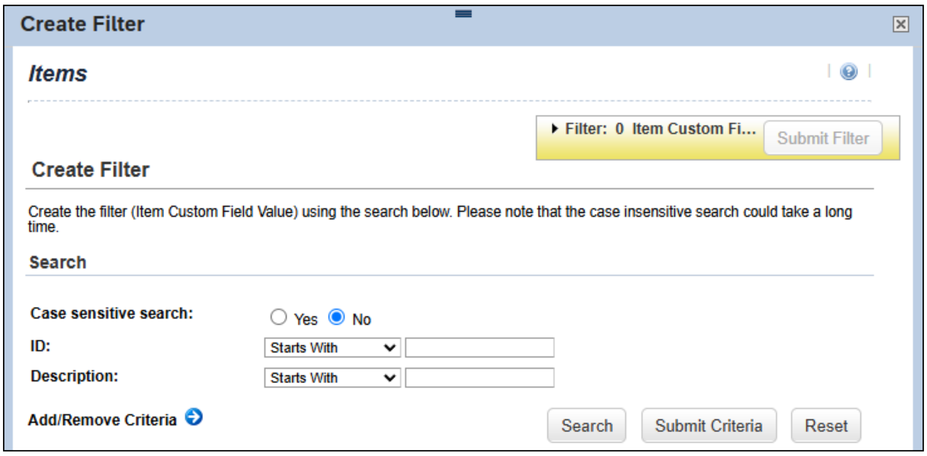


- Continue with step 2 of Searching for an item.

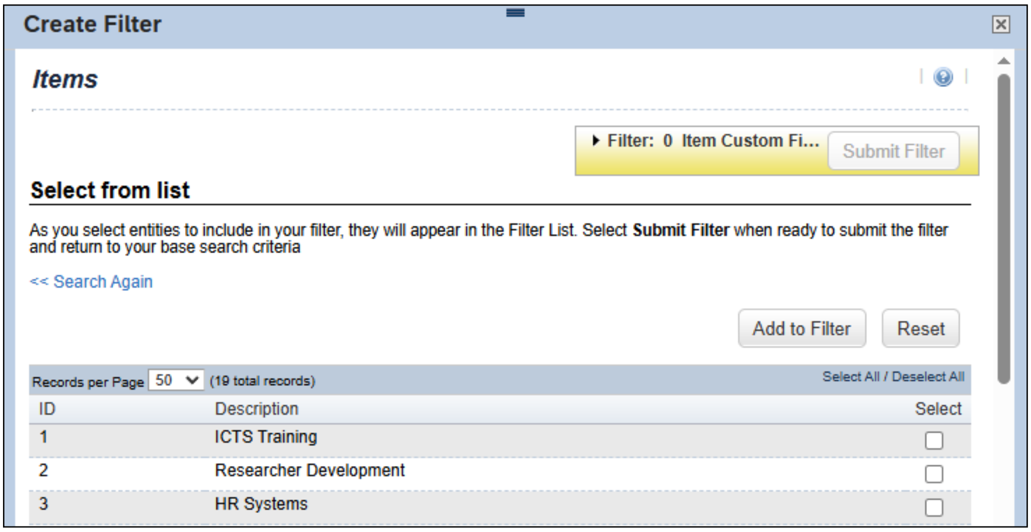
Using search filters for security domain and/or UCT area (cont)

Filter by UCT area that created the item

- Click alongside the *UCT area that created the Item* field to select a UCT area for the filter.
- The *Create Filter* dialogue box appears.

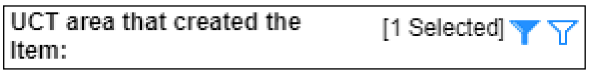


- Click Search.
- The *Create Filter* dialogue box reappears, displaying all available UCT areas.



- Choose the area by selecting the appropriate check box in the *Select* column.
- Click Add to Filter.
- A filter message briefly appears in the top right of the dialogue box, indicating that a filter has been selected.

- Click Submit Filter in the top right.
- The *Items* page reappears with the selected filter applied.



- Continue with step 2 of Searching for an item.

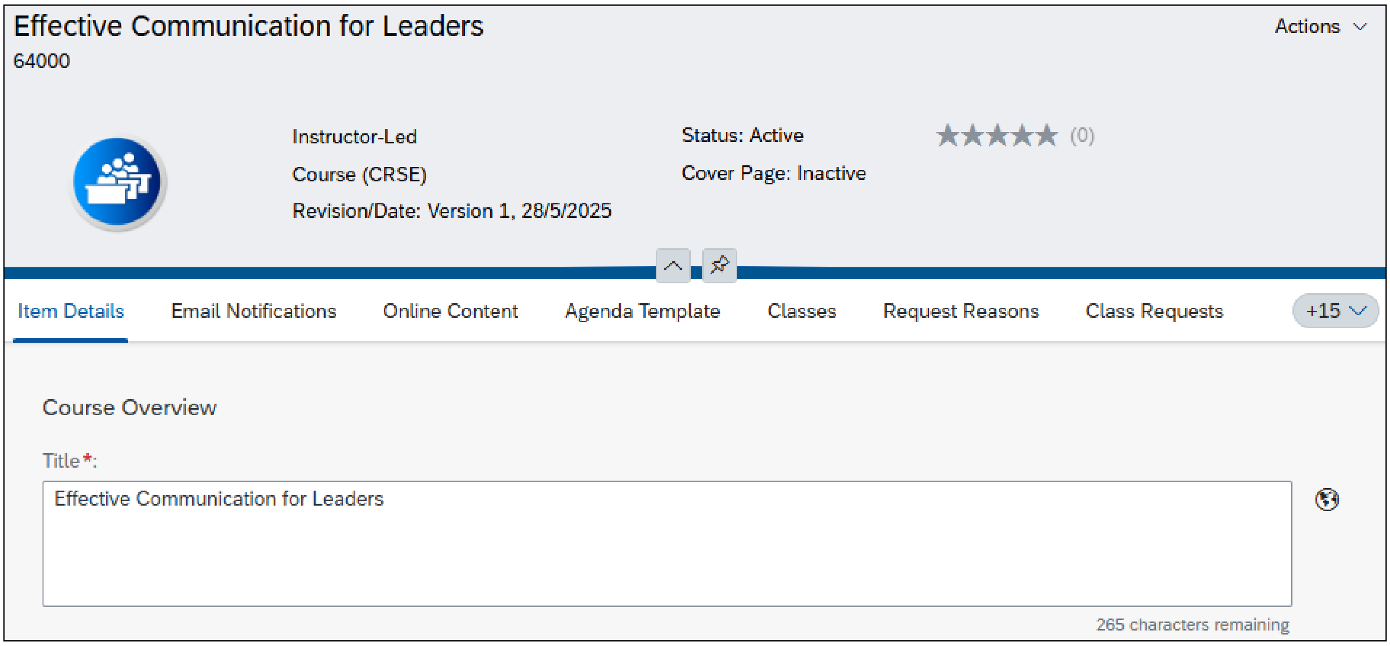
Creating a class

Background

Classes are used to schedule a learning item to take place at a specific time and with specific resources (e.g. venue, instructor).

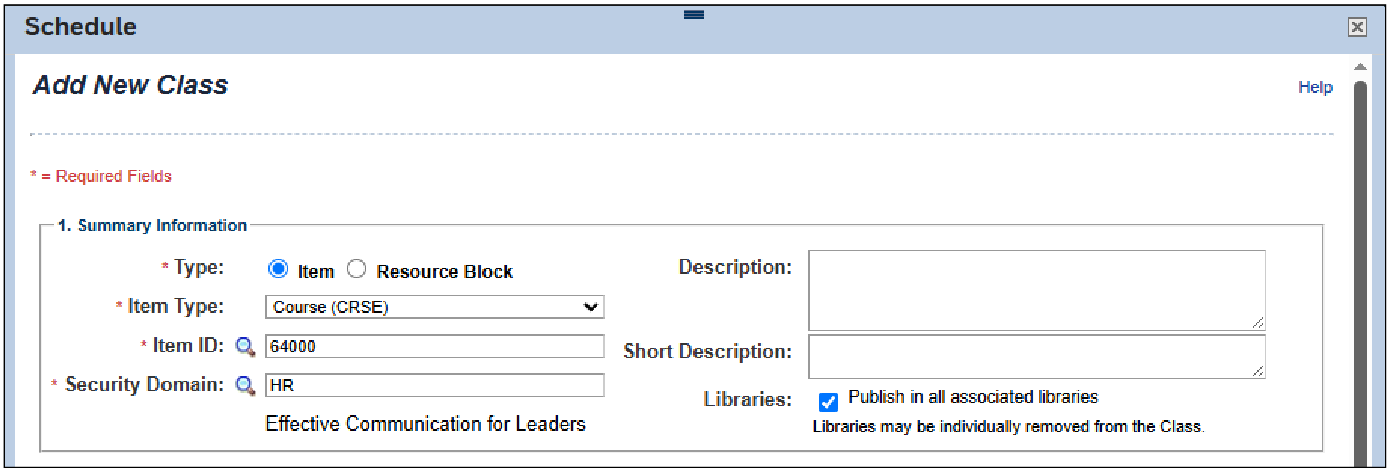
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate learning item.



- In the *Actions* menu (top right), choose *Schedule*.

3. The *Schedule* dialogue box appears.

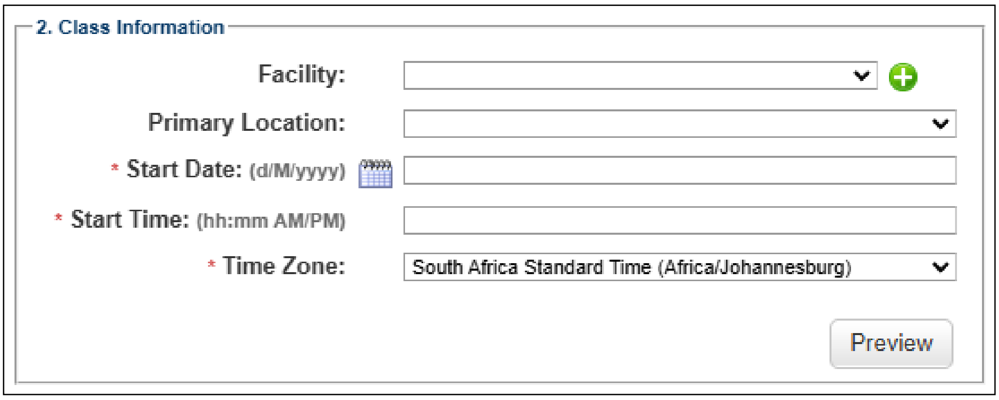


In the *Summary Information* section:

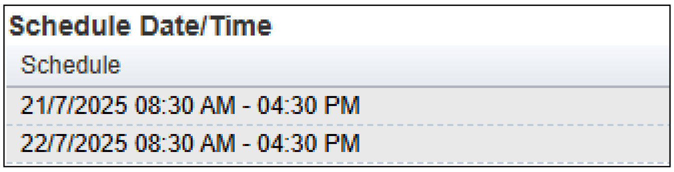
- Ensure that the correct item is selected.
- If applicable, enter a *Description* for the class e.g. July 2025.

Creating a class (continued)

In the *Class Information* section:

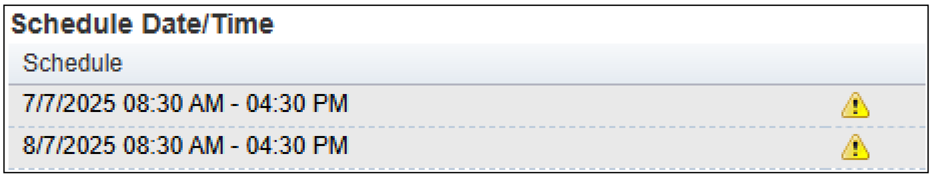


- If applicable, select the appropriate *Facility*.
- If applicable, select the appropriate *Primary Location*.
- Click to select the appropriate *Start Date* for the class using the calendar tool.
- In the *Start Time* field, enter the class start time in the required format e.g. 09:00 AM.
- Click Preview to review the date/s and times for the class. Any venue clashes with other classes are identified by a warning sign with full details in the *Resources* section.



Schedule Date/Time

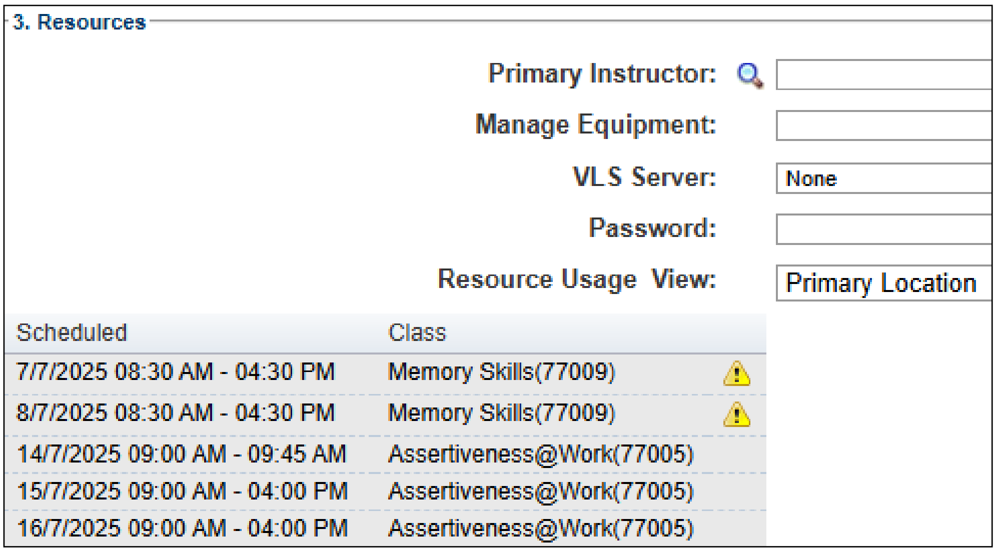
Schedule
21/7/2025 08:30 AM - 04:30 PM
22/7/2025 08:30 AM - 04:30 PM



Schedule Date/Time

Schedule
7/7/2025 08:30 AM - 04:30 PM
8/7/2025 08:30 AM - 04:30 PM

- The *Resources* section will list classes scheduled in the same location (including any clashes). If no location usage information appears, there are no classes scheduled at a similar time in the same primary location.

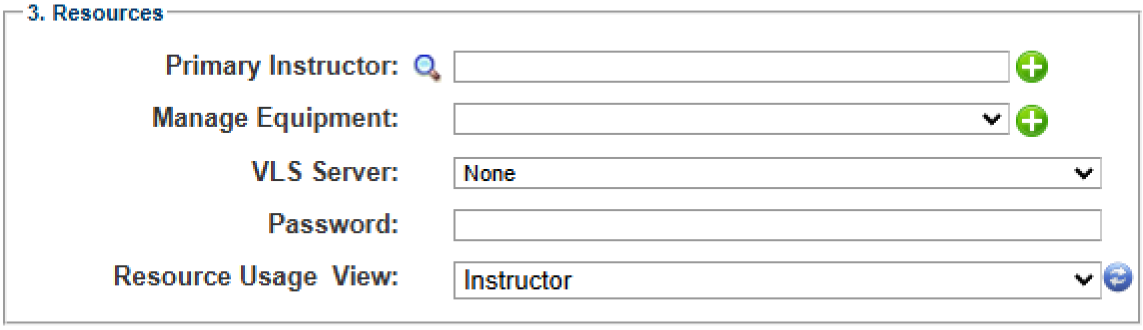


Scheduled	Class
7/7/2025 08:30 AM - 04:30 PM	Memory Skills(77009)
8/7/2025 08:30 AM - 04:30 PM	Memory Skills(77009)
14/7/2025 09:00 AM - 09:45 AM	Assertiveness@Work(77005)
15/7/2025 09:00 AM - 04:00 PM	Assertiveness@Work(77005)
16/7/2025 09:00 AM - 04:00 PM	Assertiveness@Work(77005)

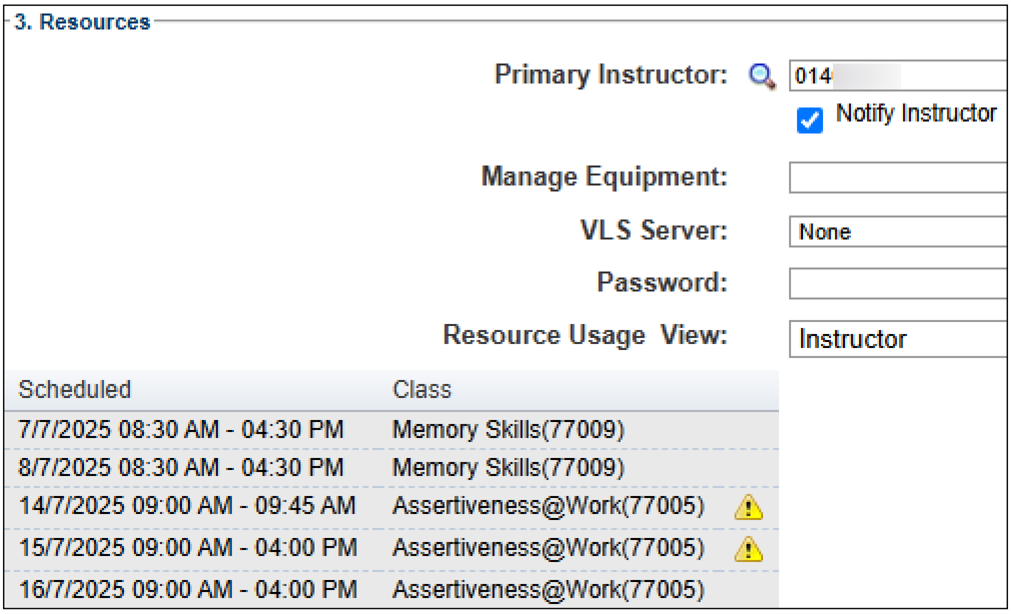
- If required, make the necessary adjustments to the *Start date*, *Facility* or *Primary Location* selections to resolve any clashes.

Creating a class (continued)

In the *Resources* section:

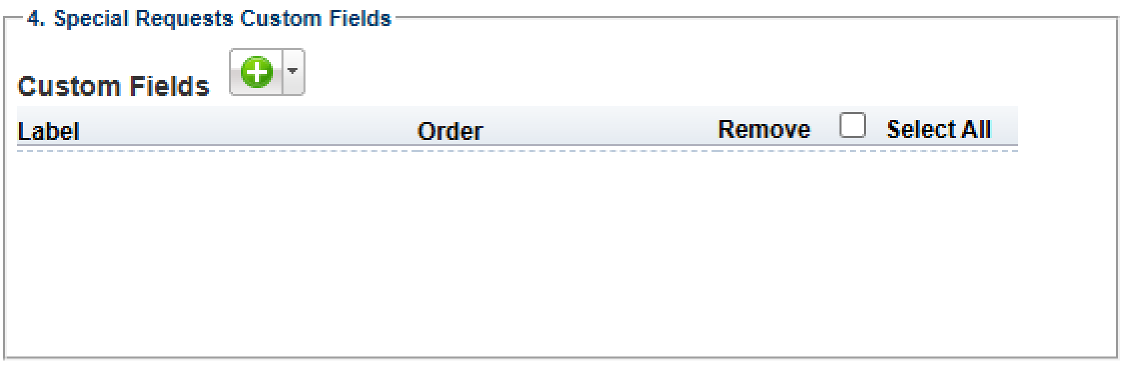


- Click to select the *Primary Instructor*.
  - The *Instructors* dialogue box appears. To view more instructors, either change the number of *Records per Page* using the dropdown arrow or click Next».
  - Click Select alongside the appropriate instructor.
- In the *Resource Usage View* field, select *Instructor* to display current classes the instructor is assigned to. If there are clashes, these are identified by a warning sign. If required, make the necessary adjustments to your selections to correct any clashes.



In the *Special Request Custom Fields* section:

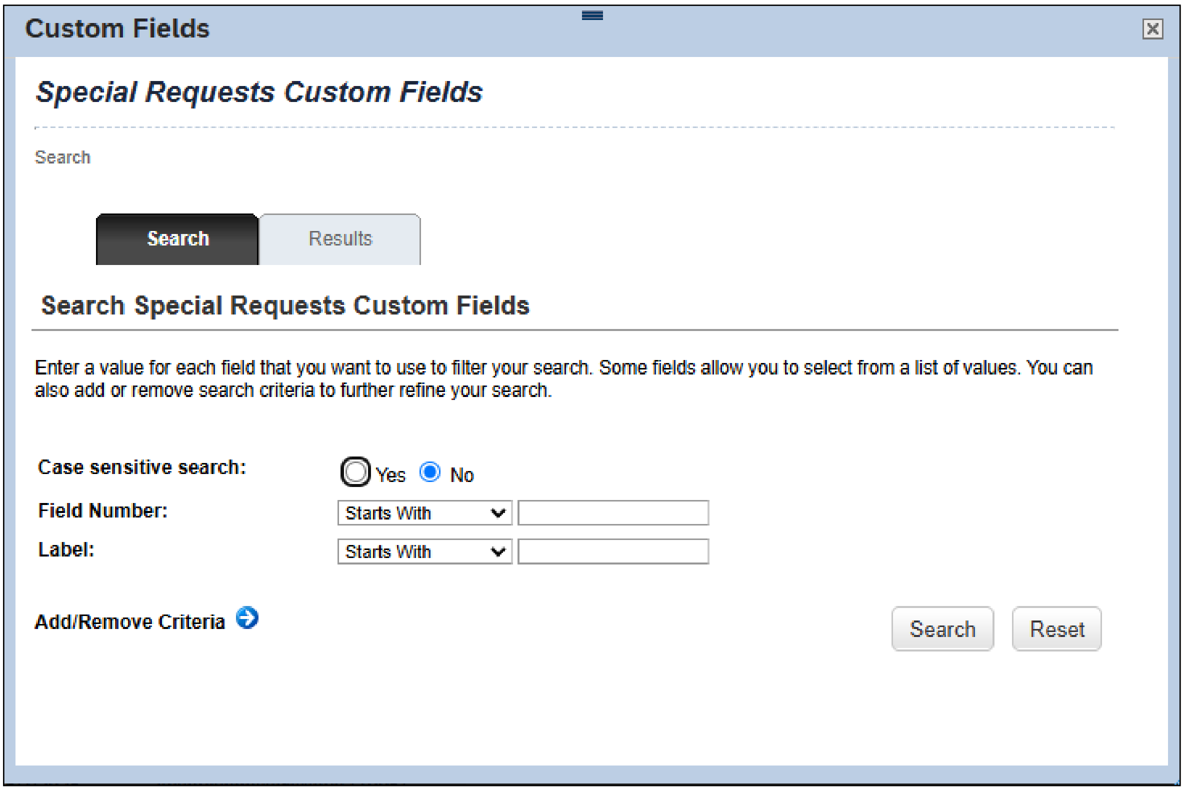
This section is used to add extra fields to the registration form e.g. dietary requirements, fund, cost centre.



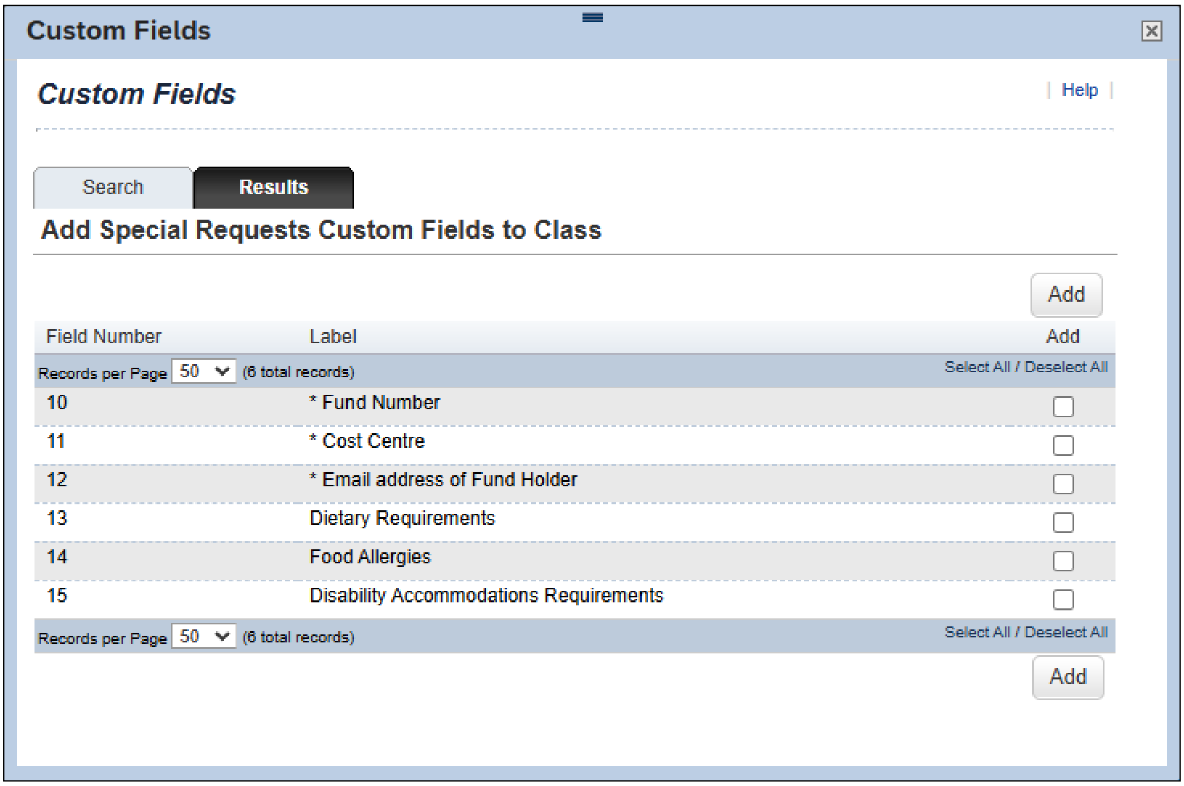
- Click *Custom Fields* and choose Custom Fields.

Creating a class (continued)

- The *Custom Fields* dialogue box appears.



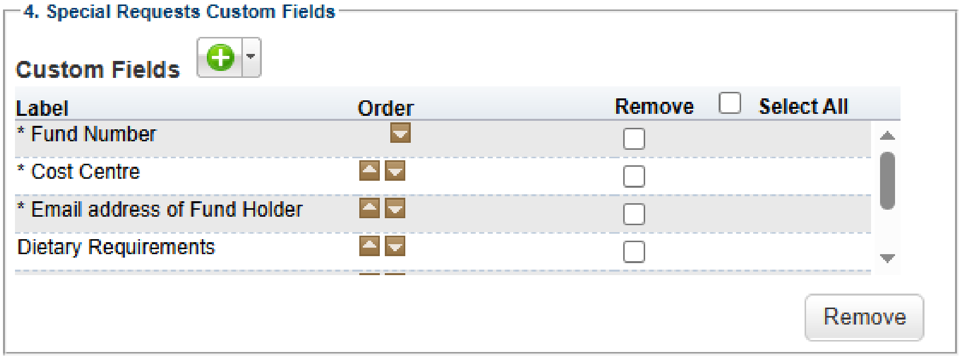
- Click Search.
- The *Custom Fields* dialogue box reappears, displaying the list of available options.



- Choose the additional fields to add to the registration form by selecting the appropriate options in the *Add* column.
- Click Add.

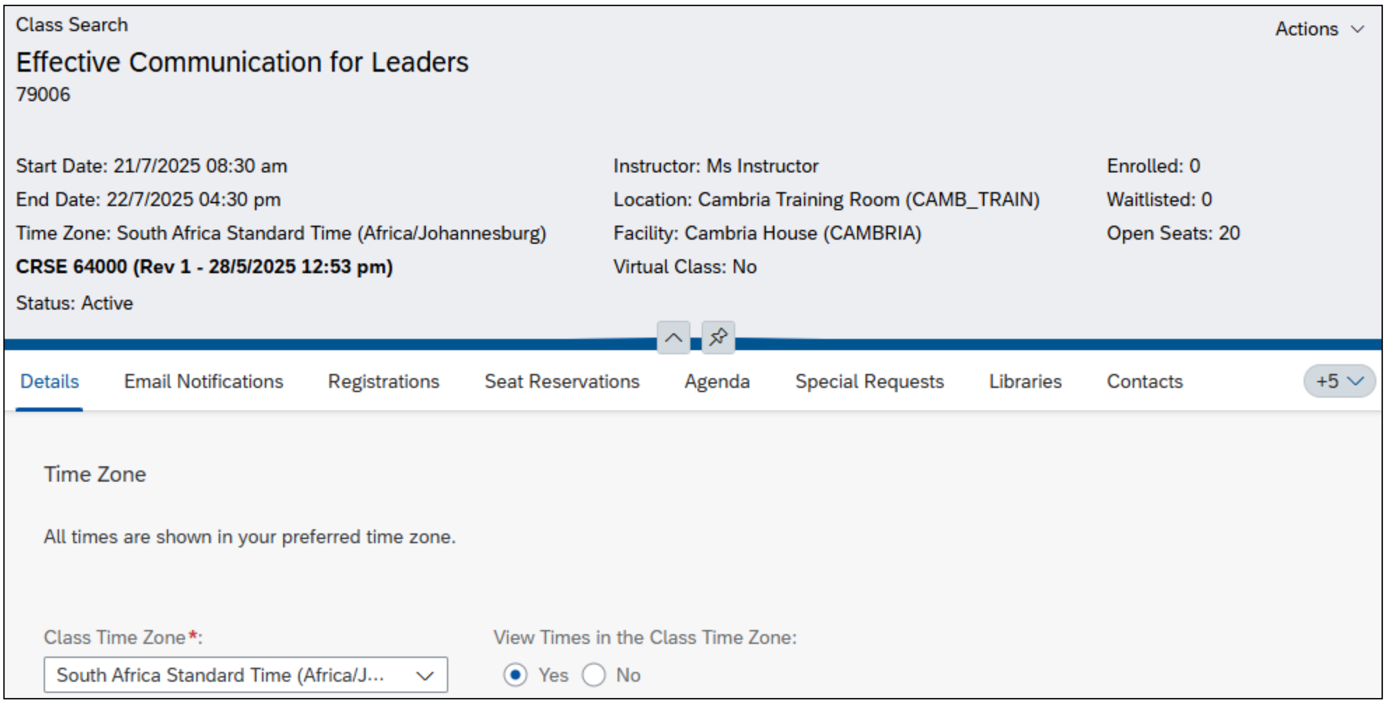
Creating a class (continued)

- The *Schedule* dialogue box reappears, displaying the selected custom field(s).



- When all the class information has been entered or selected, click Save.

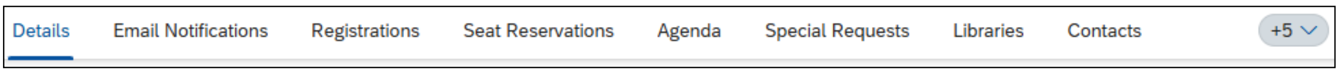
4. The class *Details* page appears, displaying the new class.



- To hide the class header details, click *Collapse Header*.

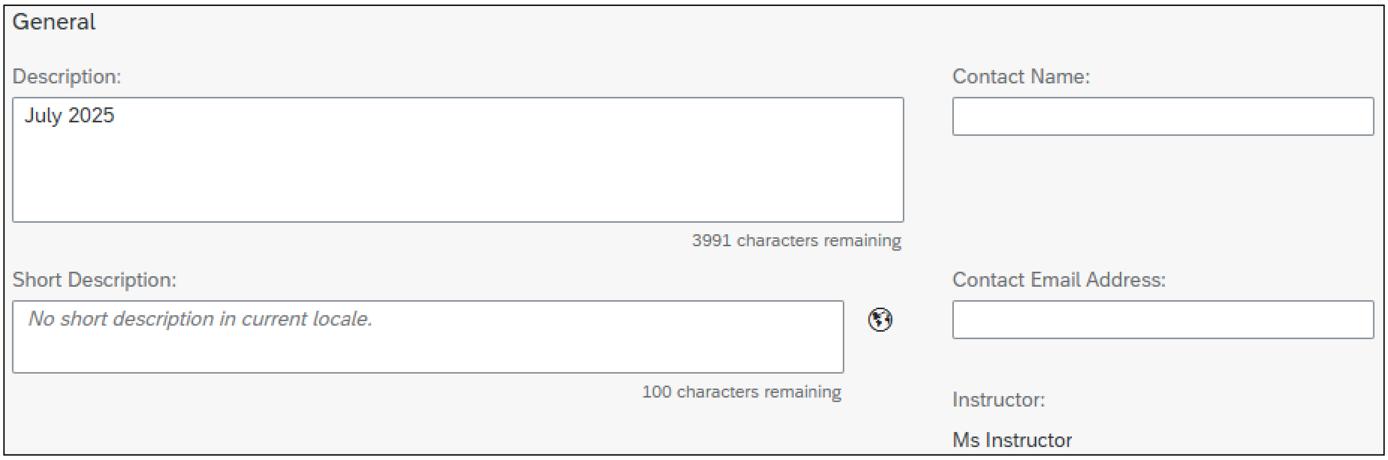
- To pin the class header details (always displayed, even when scrolling down the page), click *Pin header on press*.

- The class menu appears below the item header, providing shortcuts to the pages that can be used when setting up the class. The arrow +5 at the far right displays a dropdown list version of the menu.

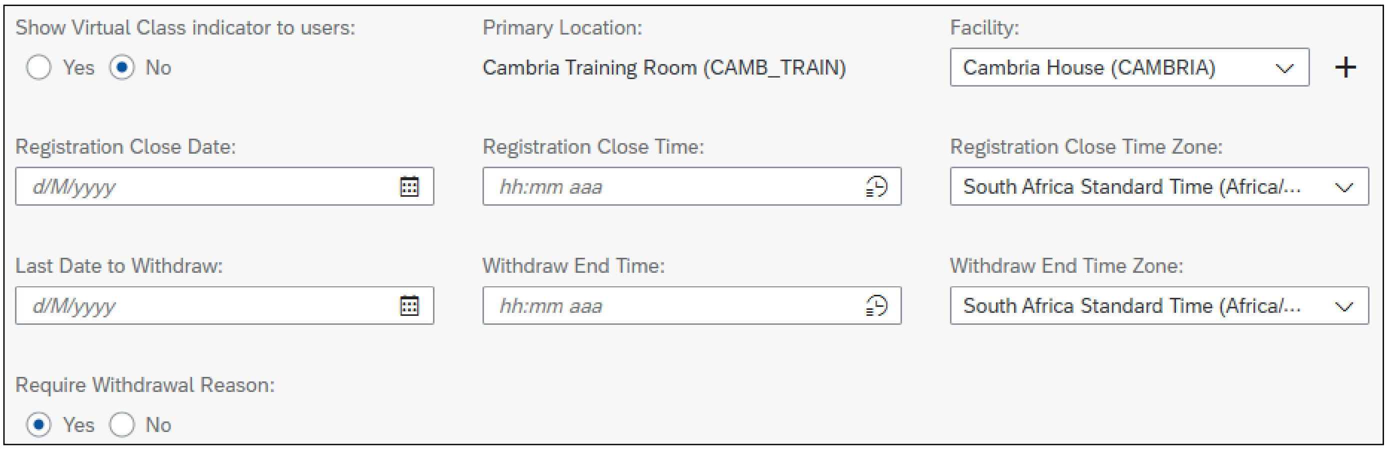


Creating a class (continued)

In the *General* section:

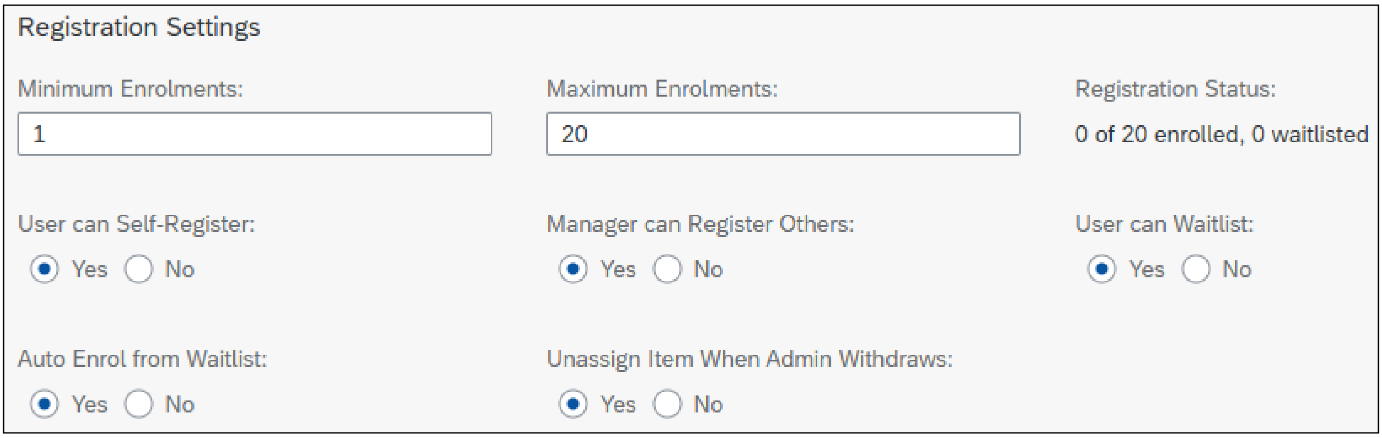


- Enter the *Contact Name* and *Contact Email Address* for the class.



- If the class is virtual (e.g. Microsoft Teams), select *Yes* for *Show Virtual Class indicator to users*.
- If applicable, enter *Registration Close Date*, *Registration Close Time*, *Last Date to Withdraw* and *Withdraw End Time* e.g. stopping registrations and withdrawals two days before the class can assist in determining final numbers for catering or printing.

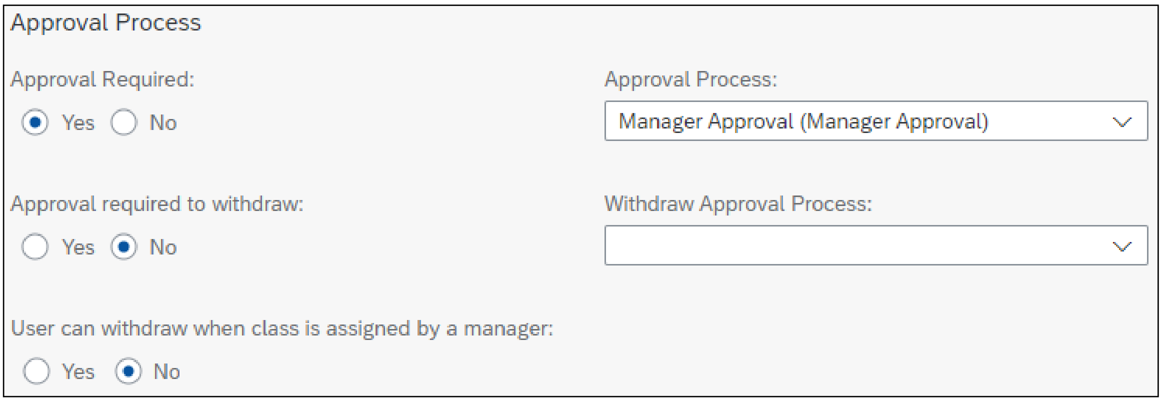
In the *Registration Settings* section:



- Review and make any required changes.

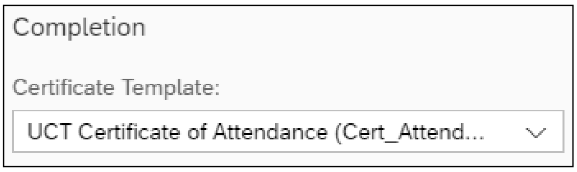
Creating a class (continued)

In the *Approval Process* section:

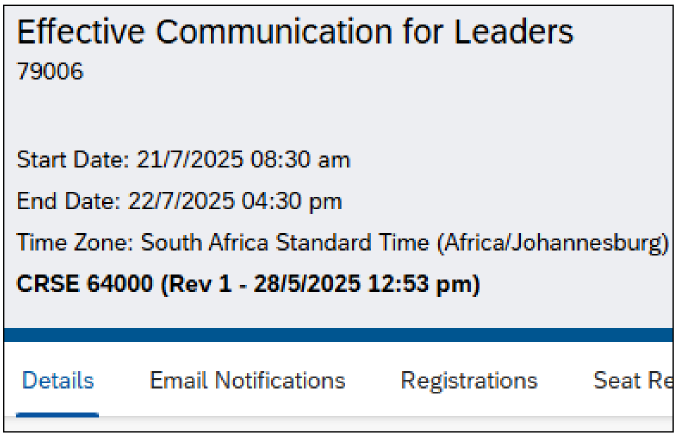


- These settings are inherited from the item, review and make any required changes.

In the *Completion* section:



- The *Certificate Template* is inherited from the item, change if required.
  Note: The UCT certificate of completion should only be used when the learner completes a task such as a test, presentation and/or submission of work.
- Click Save. A message indicates that the changes were saved.
- To view the parent item for this class, click the item hyperlink (bold, black text) in the class header e.g. CRSE 64000 (Rev 1 – 28/5/2025 12:53 pm)



- Once the *Item Details* page appears, click *Classes* for an overview of all future classes for the selected item.

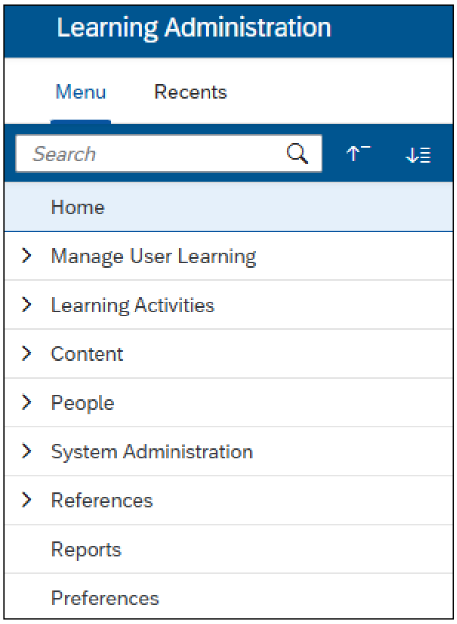
Searching for a class

Background

This procedure is useful for locating past classes or to provide an overview of all classes in an area of the University. For future classes related to a specific item, it may be best to open the item and view the *Classes* page. See Searching for an item.

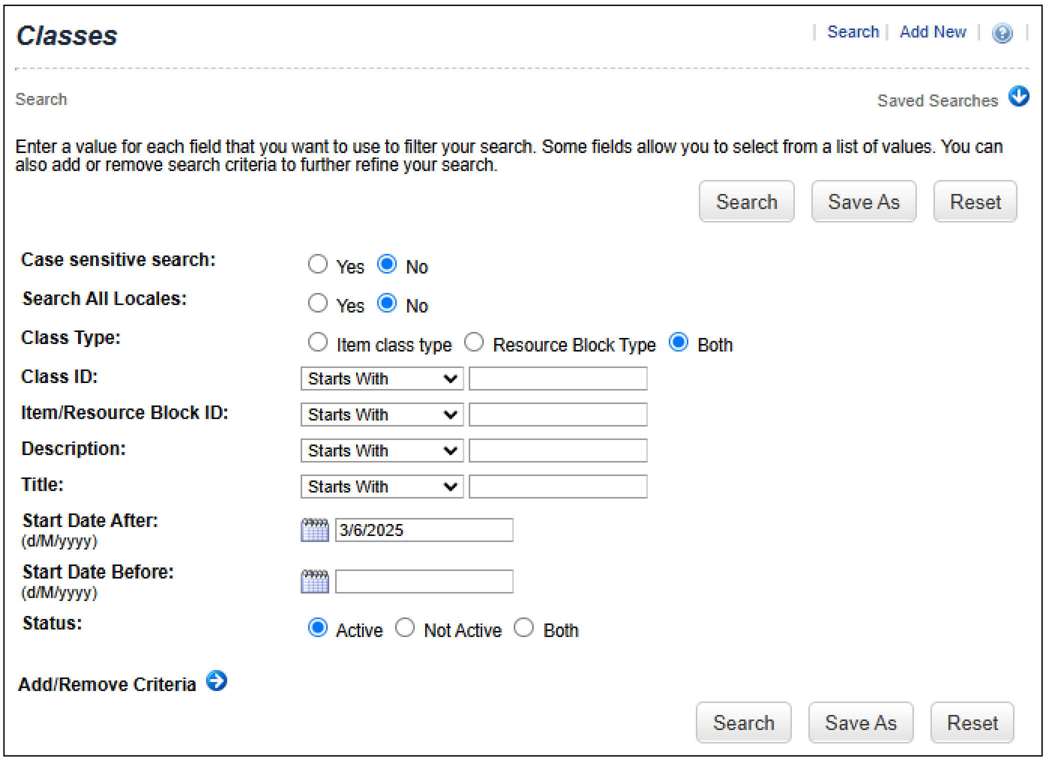
Procedure

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



- Choose *Learning Activities* > *Classes*. **Note:** Classes you've recently accessed can be found in *Recents*.

2. The *Classes* page appears.
   If you have previously saved a search, see: Searching for a class using a saved search.



- Enter search criteria in any of the available fields e.g. *Title*.
- If searching for a class in the past, change the date in the *Start Date After* field.

Searching for a class (continued)

- If the class you're searching for is not active, ensure you make the appropriate selection in the *Status* field. **Note**: An inactive class is accessible to Learning Administrators but can't be seen by learners.
- To add additional search fields (e.g. *Security Domains*, *Primary Location*, *Instructor*), click alongside *Add/Remove Criteria*.
  - In the *Search Criteria* dialogue box, select the applicable fields using the check boxes and click Select.
- The *Security Domains* field can be used to find the classes for your domain but only if the class was linked to a security domain (if the item has a security domain, the class will inherit the same domain).
- Click Search. **Note**: If no search criteria were entered, all future active classes that you have authorisation to view will appear in the search results.

3. The search results appear at the bottom of the *Classes* page.

Field Chooser | Download Search Results

Grid View | Calendar View

Records per Page 50 (13 total records)

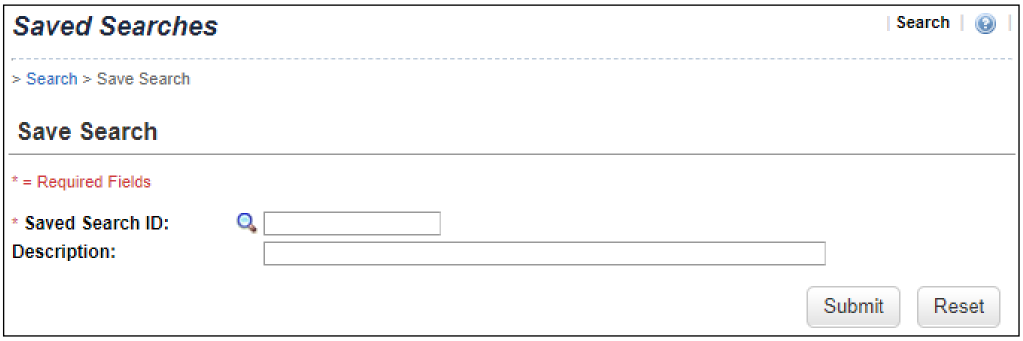
Class ID	Title	Item/Resource Block
79004	Introduction to UCT for new staff	CRSE **1000009** (Rev 1 - 1/8/2018 10:00 AM Africa/Johannesburg)
77002	Development Dialogue Training	CRSE **7006** (Rev 1 - 7/11/2019 01:46 PM Africa/Johannesburg)
77009	Memory Skills	CRSE **56004** (Rev 1 - 3/4/2024 02:08 PM Africa/Johannesburg)
79000	English for Everyone	CRSE **2006** (Rev 1 - 15/3/2019 04:49 PM Africa/Johannesburg)
77005	Assertiveness@Work	CRSE **7013** (Rev 1 - 12/11/2019 12:07 PM Africa/Johannesburg)
79009	Effective Communication for Leaders	CRSE **64000** (Rev 1 - 28/5/2025 12:53 PM Africa/Johannesburg)
79007	Effective Communication for Leaders	CRSE **64000** (Rev 1 - 28/5/2025 12:53 PM Africa/Johannesburg)
79001	Time Management Skills to Maximise Productivity	CRSE **55002** (Rev 1 - 25/1/2024 02:24 PM Africa/Johannesburg)
77010	Memory Skills	CRSE **56004** (Rev 1 - 3/4/2024 02:08 PM Africa/Johannesburg)
79002	Time Management Skills to Maximise Productivity	CRSE **55002** (Rev 1 - 25/1/2024 02:24 PM Africa/Johannesburg)
79008	Effective Communication for Leaders	CRSE **64000** (Rev 1 - 28/5/2025 12:53 PM Africa/Johannesburg)
79003	Time Management Skills to Maximise Productivity	CRSE **55002** (Rev 1 - 25/1/2024 02:24 PM Africa/Johannesburg)
76002	Customer Service	CRSE **59002** (Rev 1 - 7/5/2024 11:22 AM Africa/Johannesburg)

Records per Page 50 (13 total records)

- To view more search results, either change the number of *Records per Page* using the dropdown arrow or click Next».
- The search results can be exported to an Excel spreadsheet, providing a useful overview of the selected classes. Click Download Search Results to download a .csv file.
- Click the Calendar View tab to see classes listed by month.

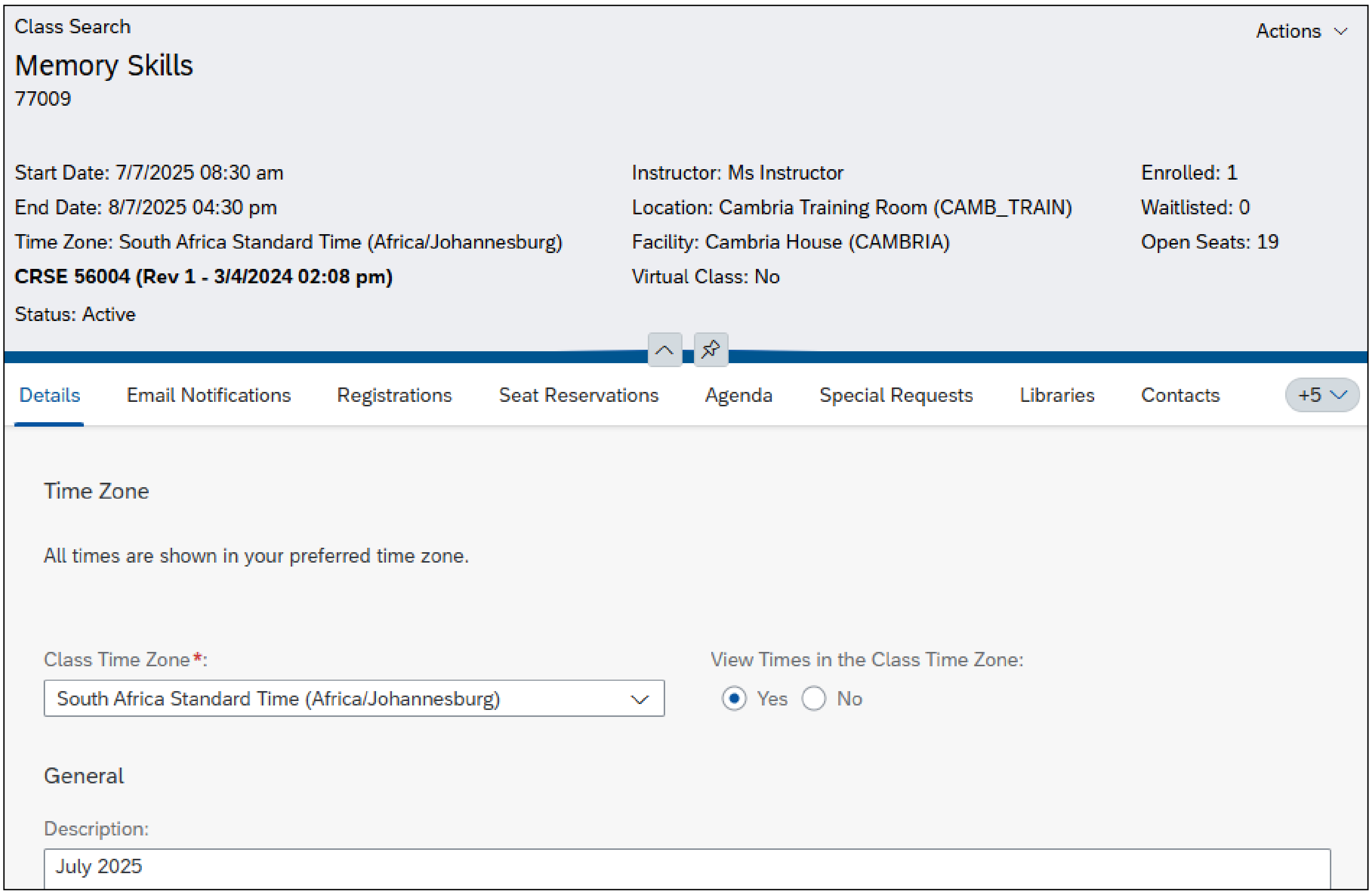
Searching for a class (continued)

- To save the search to use again, click Save As. **Note**: The search will be saved with the current date in the *Start Date After* field, this may need to be changed each time you run the saved search.
  - The *Saved Searches* page appears.



  - Enter the *Saved Search ID* name e.g. HR_Domain_Classes.
  - Enter a *Description* e.g. Active classes in the HR security domain.
  - Click Submit.
- In the *Grid View* tab, select the appropriate class by clicking the hyperlink in the *Class ID* column. If using the *Calendar View* tab, click the appropriate class ID hyperlink in the calendar.

4. The class *Details* page appears.

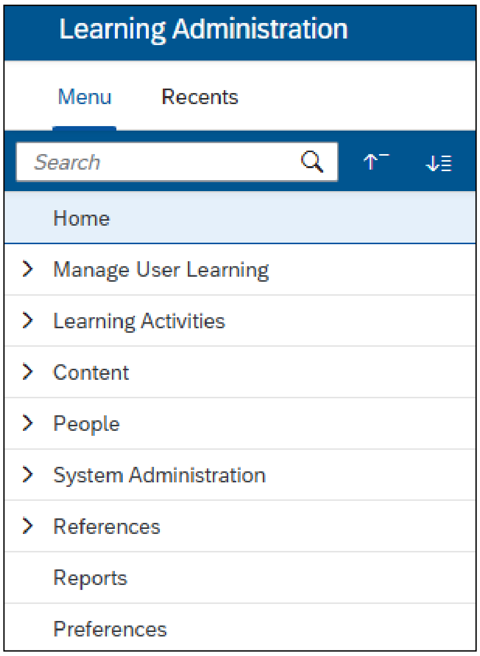


- To select a different class from the previous search results, click *Class Search* (top left).

Searching for a class using a saved search

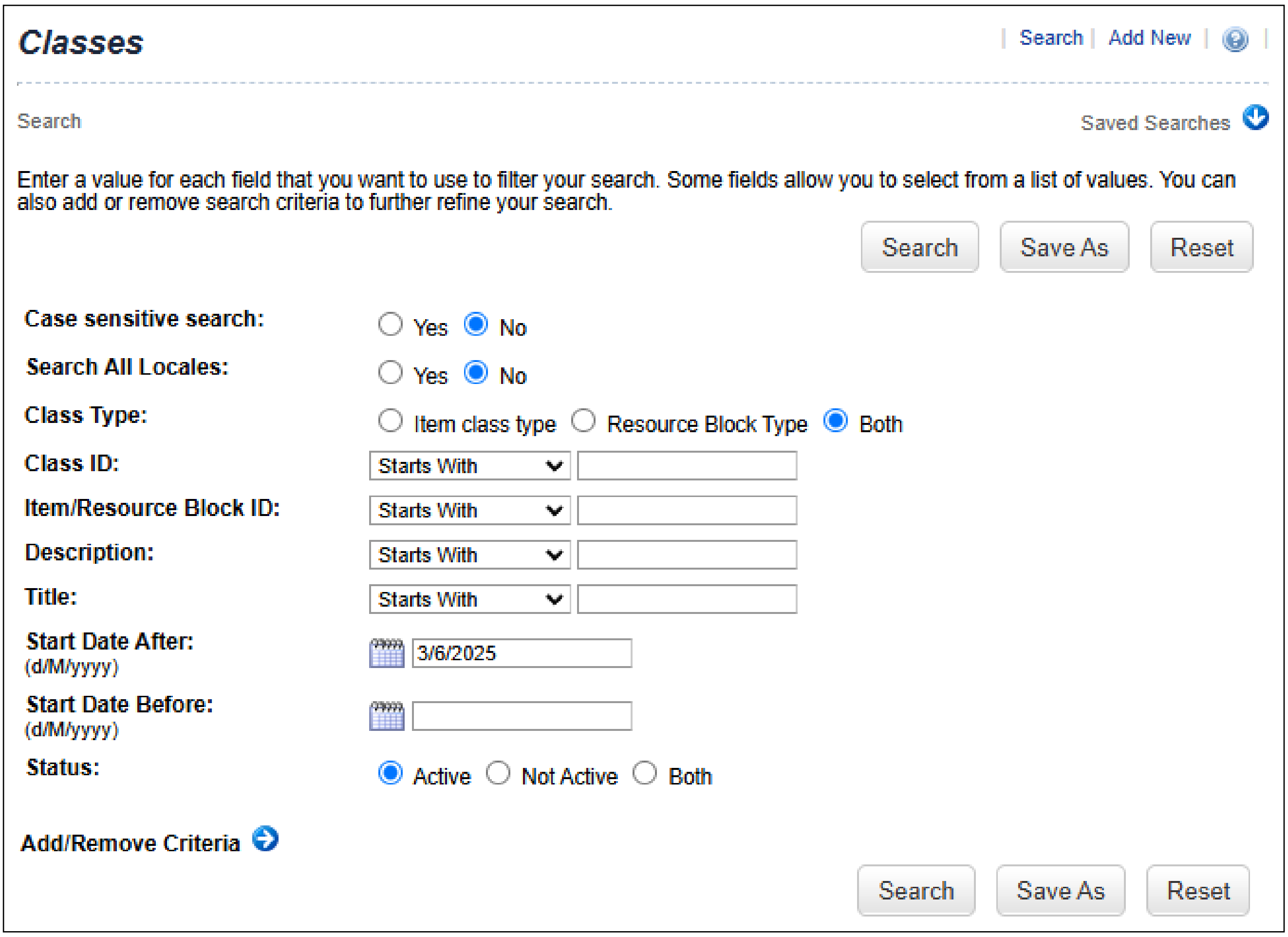
Procedure

1. [Log in to SuccessFactors and access the *Learning Administration* page](#).



- Choose *Learning Activities* > *Classes*. **Note:** Classes you've recently accessed can be found in *Recents*.

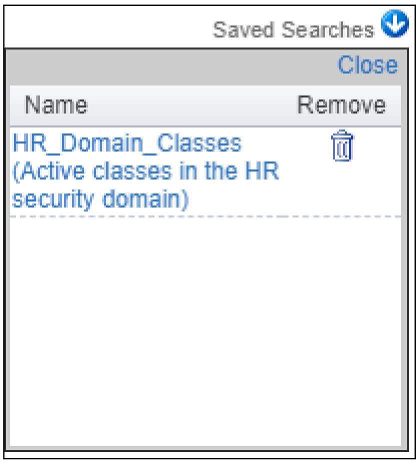
2. The *Classes* page appears.



- Click alongside *Saved Searches*.

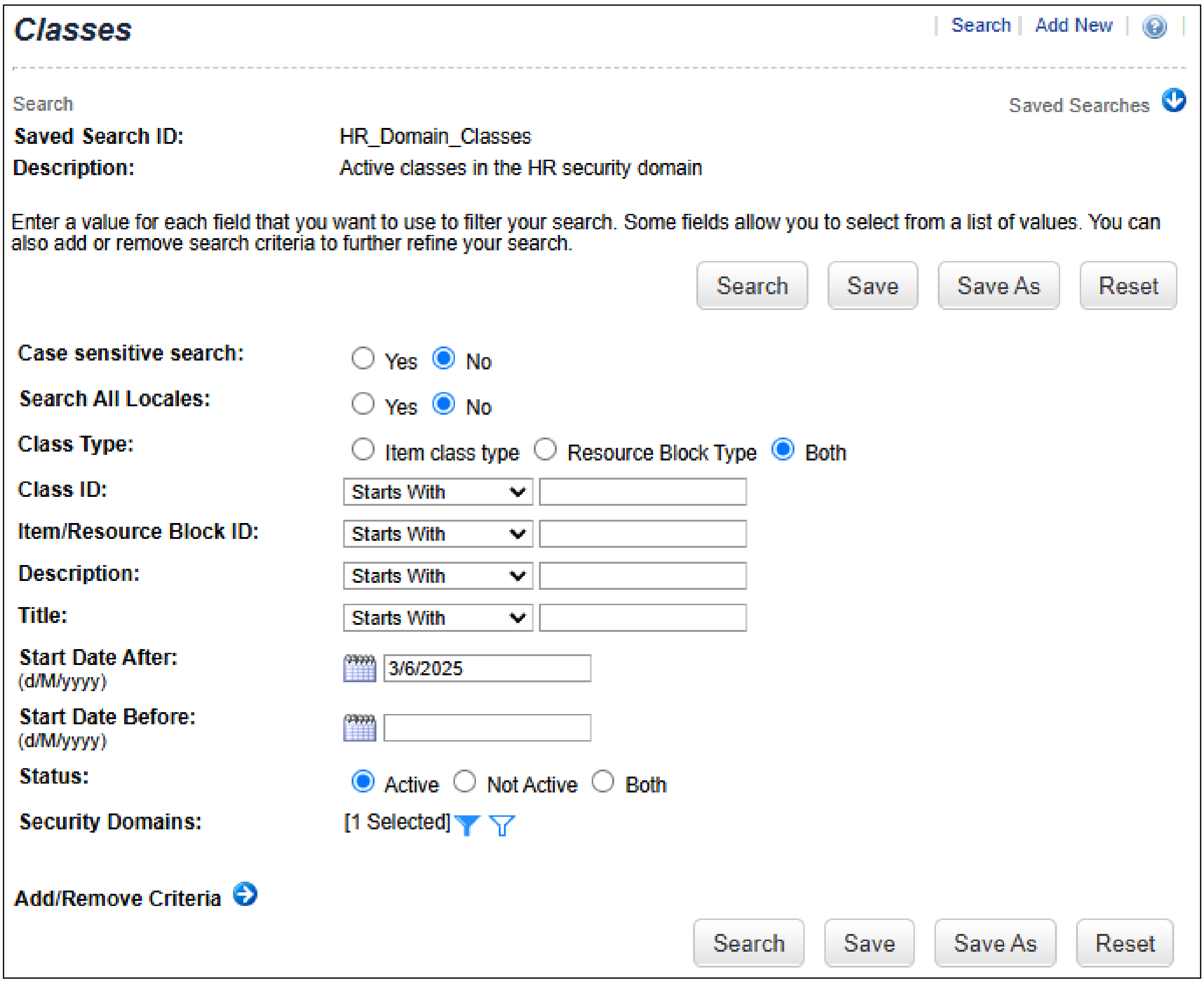
Searching for a class using a saved search (continued)

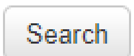
3. A dialogue box appears, displaying all your previously saved searches.



- Select the appropriate search by clicking the hyperlink in the *Name* column.

4. The *Items* page reappears, displaying the name and description of the selected search at the top of the page. The selection criteria and/or filters from the saved search will appear on the page.



- If applicable, review/change the date in the *Start Date After* field.
- Click 

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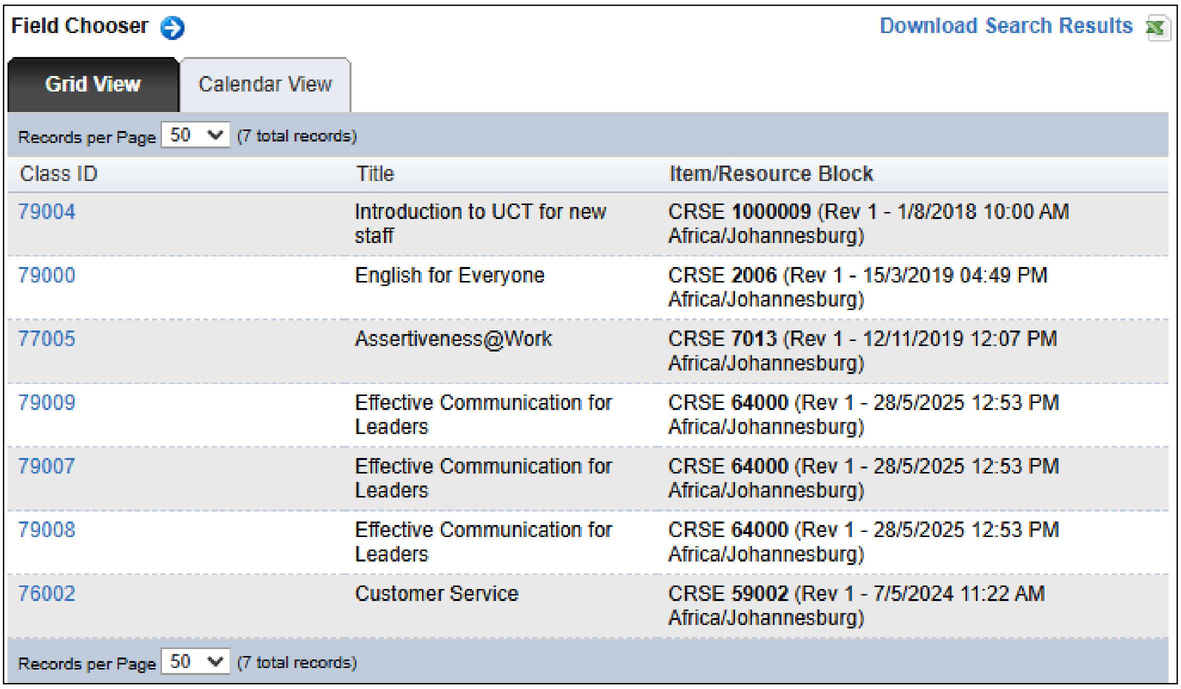
Searching for a class using a saved search (continued)

5. The search results appear at the bottom of the *Classes* page.



Field Chooser | Download Search Results

Grid View | Calendar View

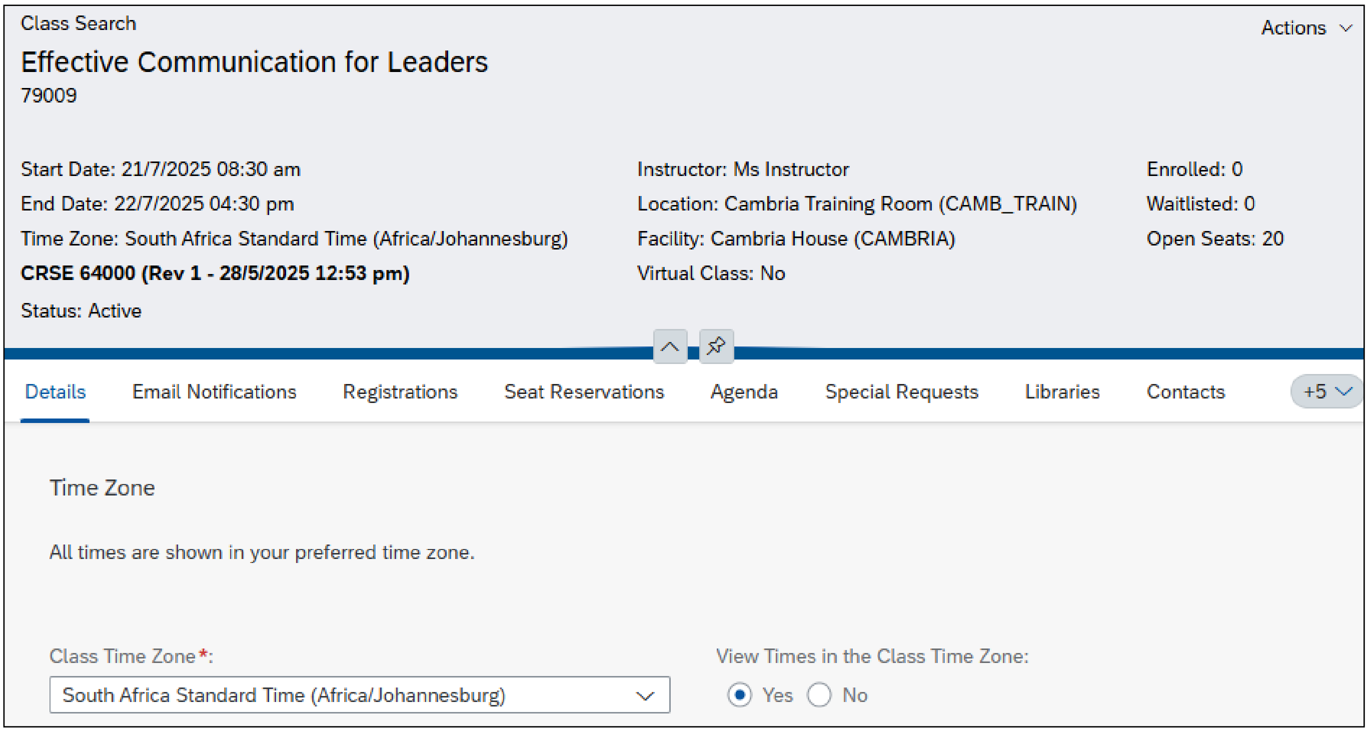
Records per Page 50 (7 total records)

Class ID	Title	Item/Resource Block
79004	Introduction to UCT for new staff	CRSE **1000009** (Rev 1 - 1/8/2018 10:00 AM Africa/Johannesburg)
79000	English for Everyone	CRSE **2006** (Rev 1 - 15/3/2019 04:49 PM Africa/Johannesburg)
77005	Assertiveness@Work	CRSE **7013** (Rev 1 - 12/11/2019 12:07 PM Africa/Johannesburg)
79009	Effective Communication for Leaders	CRSE **64000** (Rev 1 - 28/5/2025 12:53 PM Africa/Johannesburg)
79007	Effective Communication for Leaders	CRSE **64000** (Rev 1 - 28/5/2025 12:53 PM Africa/Johannesburg)
79008	Effective Communication for Leaders	CRSE **64000** (Rev 1 - 28/5/2025 12:53 PM Africa/Johannesburg)
76002	Customer Service	CRSE **59002** (Rev 1 - 7/5/2024 11:22 AM Africa/Johannesburg)

Records per Page 50 (7 total records)

- To view more search results, either change the number of *Records per Page* using the dropdown arrow or click Next».
- The search results can be exported to an Excel spreadsheet, providing a useful overview of the selected classes. Click Download Search Results to download a .csv file.
- Click the Calendar View tab to see classes listed by month.
- In the *Grid View* tab, select the appropriate class by clicking the hyperlink in the *Class ID* column. If using the *Calendar View* tab, click the appropriate class ID hyperlink in the calendar.

6. The class *Details* page appears.

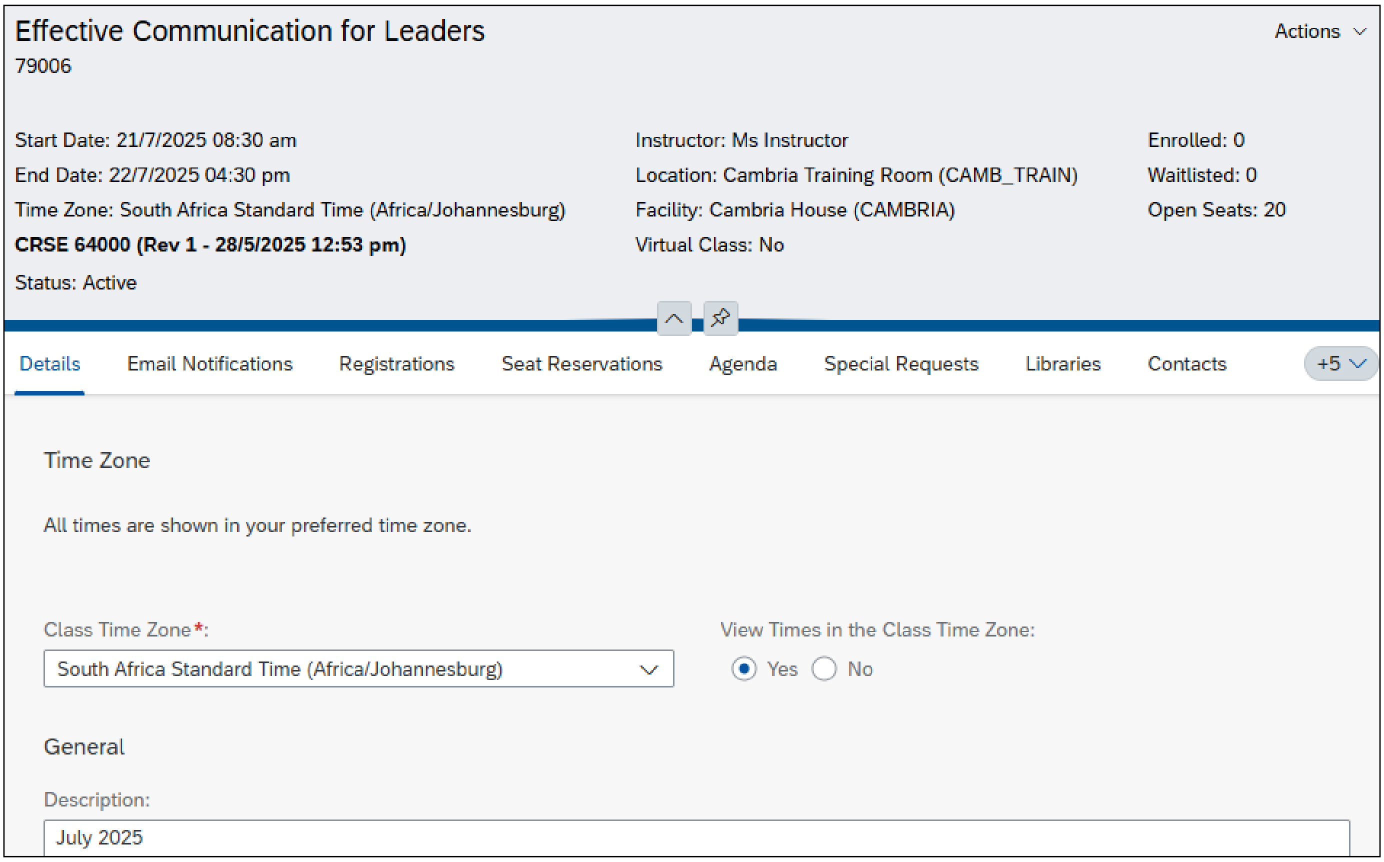


- To select a different class from the previous search results, click *Class Search* (top left).

Registering or waitlisting learners for a class

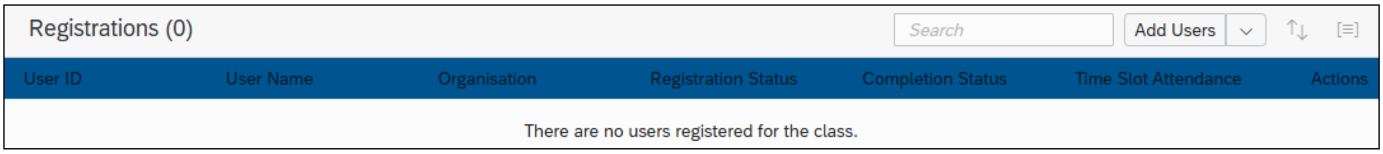
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate class.



- In the class menu, click *Registrations*.

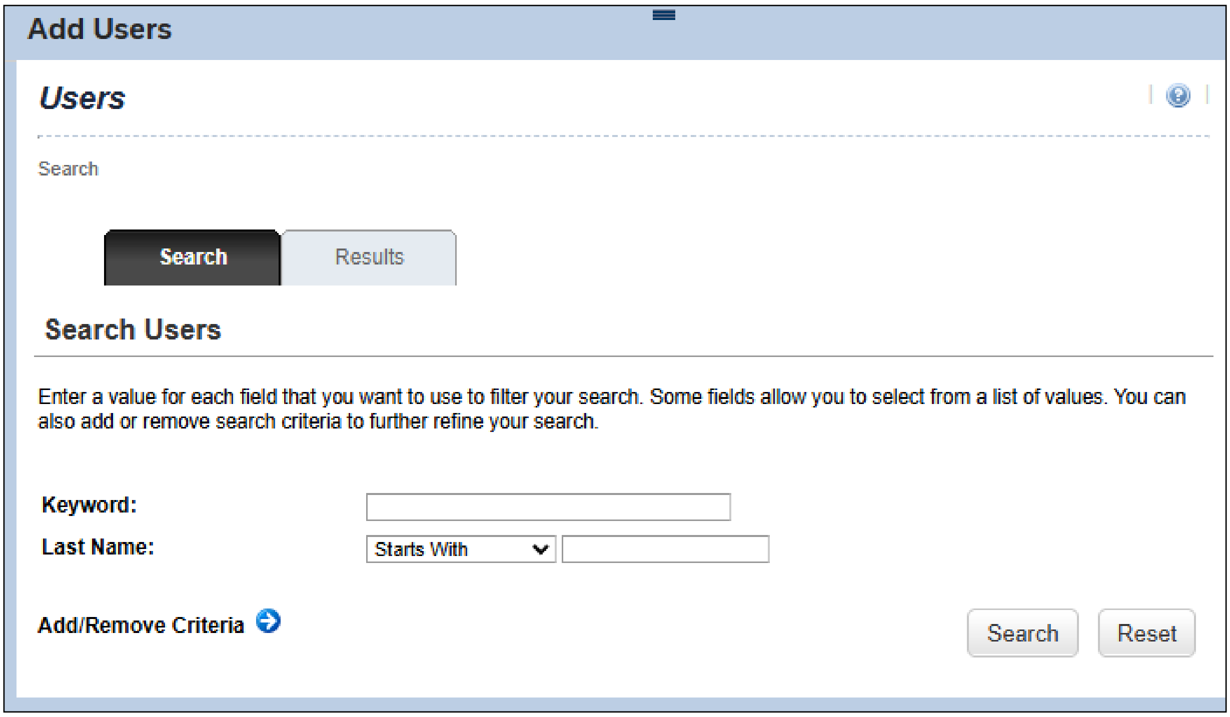
3. The *Registrations* page appears.



- Click 
.

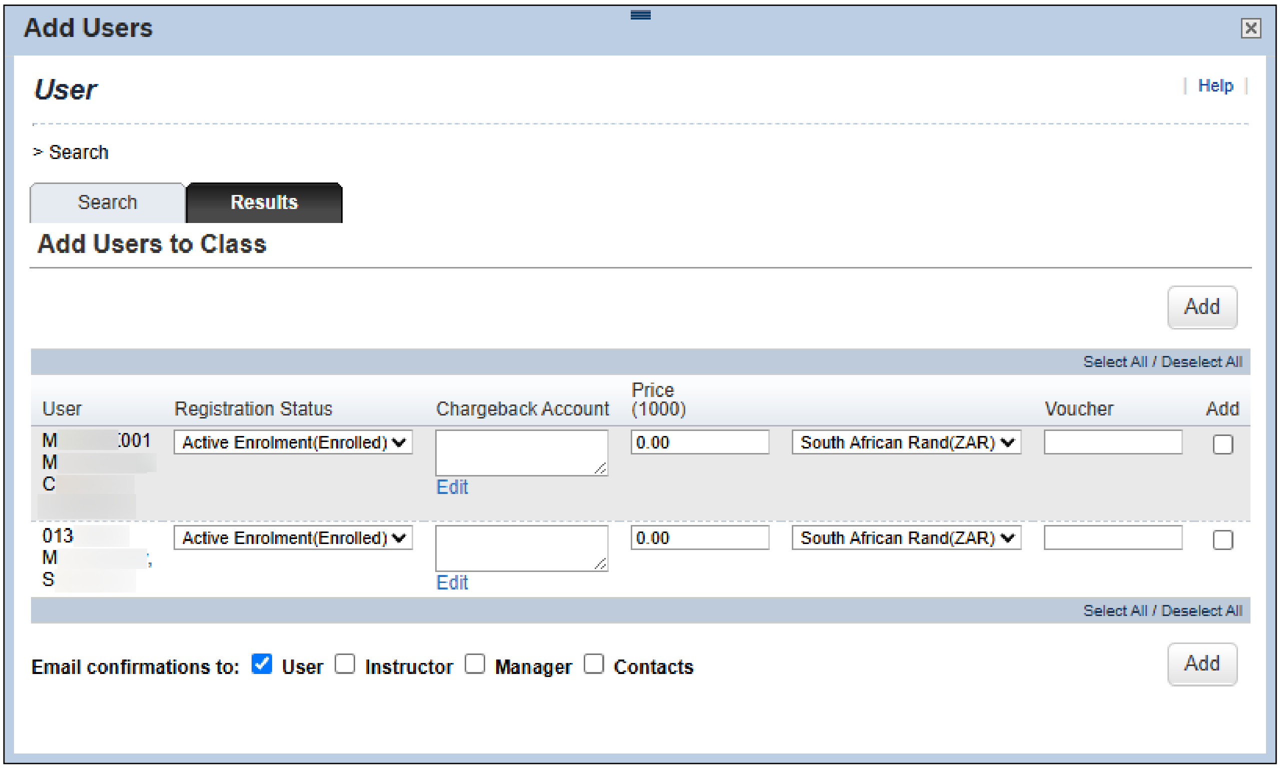
Registering or waitlisting learners for a class (continued)

4. The *Add Users* dialogue box appears.
   - Click Add/Remove Criteria to add additional search criteria, e.g. *Last Name*, *User ID* for the staff number. **Note**: The *Keyword* field can be used to search for users but produces a less organised list when searching for a common last name.



   - Complete the relevant search fields.
   - Click Search.

5. The *Add Users* dialogue box reappears, displaying the search results.



   - To view more results, either change the number of *Records per Page* using the dropdown arrow or click Next» to view additional results.

Registering or waitlisting learners for a class (continued)

- Select the check box in the *Add* column for each learner to register for the class.
- The default *Registration Status* is *Active Enrolment (Enrolled)*. If applicable, change the *Registration Status* per learner e.g. Waitlisted.
- Click Add.

  Note: This manual registration will bypass any prerequisites, the manager approval process and the registration form (if used for this class) for fund, cost centre, fund holder email address, allergies, dietary requirements and disability accommodations.
- If the **maximum registration for the class has been exceeded**, a warning message appears.

  Click Yes to proceed with the registration. If the learner's registration status wasn't changed to *Waitlisted* on the previous page, the maximum registration is increased.
- If the learner **doesn't meet the prerequisites** of the class, a warning message appears.

  Click Yes to proceed with the registration and bypass the prerequisite.
- If **adding a learner to the waitlist before the class is full**, a warning message appears.

  Click Yes to proceed with the registration.
- If the **end date for registration changes has passed**, a warning message appears.

  Click Yes to proceed with the registration.

6. The *Registrations* page reappears, displaying the new registrations in either the *Active Enrolment* or *Waitlisted* sections.

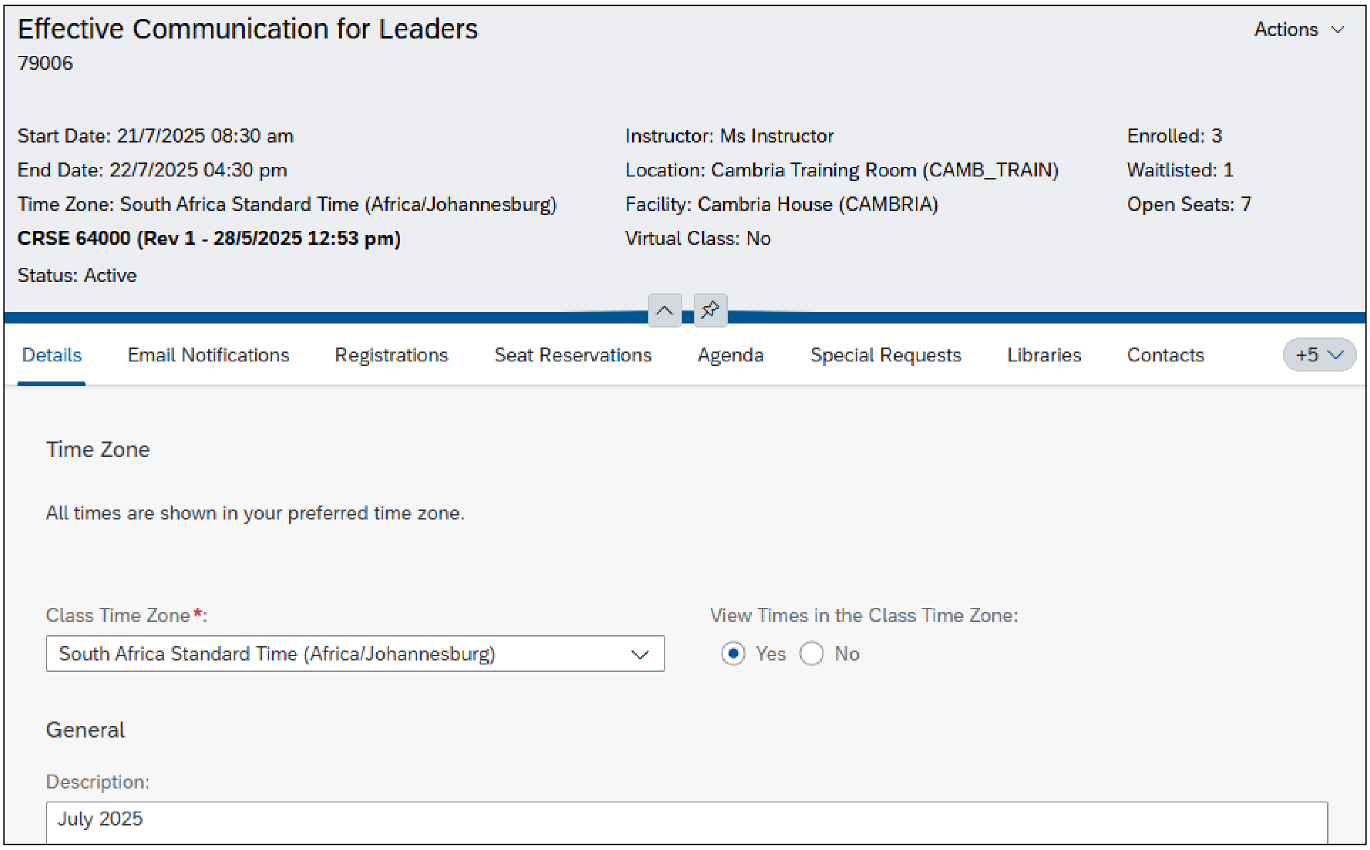
Registrations (4) — Search User ID or Use... — Add Users

User ID	User Name	Organisation	Registration Status	Completion Status	Time Slot Attendance	Actions
Active Enrolment (3)						
014	C	(Research Contracts & Innovation) Research Contracts & Innovation	Active Enrolment		0	ooo
014	L	(Coll of Accounting: Operations & Admin) Coll of Accounting: Operations & Admin	Active Enrolment		0	ooo
014	A	(BIO: Dept. of Biological Sciences) BIO: Dept. of Biological Sciences	Active Enrolment		0	ooo
Waitlisted (1)						
014	G	(ACDI: Operations Portfolio) ACDI: Operations Portfolio	Waitlisted		0	ooo

Managing class registrations

Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate class.



- In the class menu, click *Registrations*.

Managing class registrations (continued)

3. The *Registrations* page appears.

Registrations (5)

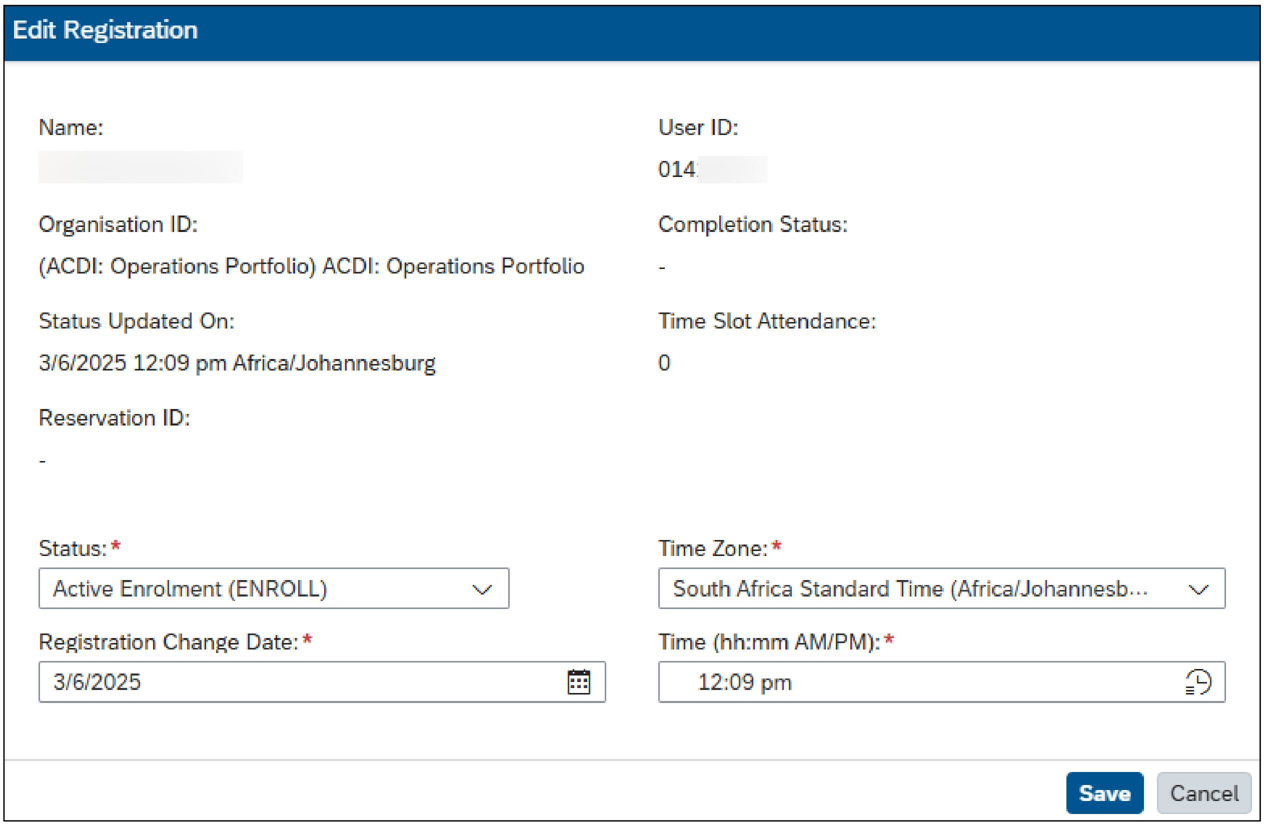
Search User ID or Use... | Add Users

User ID	User Name	Organisation	Registration Status	Completion Status	Time Slot Attendance	Actions
Active Enrolment (2)						
014		(ACDI: Operations Portfolio) ACDI: Operations Portfolio	Active Enrolment		0	•••
014		(Research Contracts & Innovation) Research Contracts & Innovation	Active Enrolment		0	•••
Cancelled (1)						
014		(FIN Payments & Reconciliations) FIN Payments & Reconciliations	Cancelled		0	•••
Pending (1)						
014		(Coll of Accounting: Operations & Admin) Coll of Accounting: Operations & Admin	Pending		0	•••
Waitlisted (1)						
014		(BIO: Dept. of Biological Sciences) BIO: Dept. of Biological Sciences	Waitlisted		0	•••

- Learners will appear in one of the registration groupings i.e. *Active Enrolment*, *Cancelled*, *Pending* (awaiting manager approval) or *Waitlisted*.
- To delete a registration, click ••• *Additional Options* and choose *Remove*. If the class settings allow auto enrolling from the waitlist, SuccessFactors will automatically move a learner from the waitlist to take the place of the deleted registration.
  Note: A deletion is not recorded as a cancellation.

Managing class registrations (continued)

- To change a registration, click ••• *Additional Options* and choose *Edit*.
  - The *Edit Registration* dialogue box appears.



  - In the *Status* field, select the appropriate status from the dropdown list i.e. *Cancelled* or *Waitlisted*.
  - If changing the *Status* to cancelled, select the appropriate *Withdrawal Reason*.
  - Click Save.
    Note: If there are warning messages regarding prerequisites or maximum registrations, indicate if you wish to proceed with the registration change.
  - The *Registrations* page reappears, a message indicates that the status of the learner has changed.
    Note: If a registration was cancelled and the class settings allow auto enrolling from the waitlist, SuccessFactors will automatically move a learner from the waitlist to take the place of the cancelled registration.

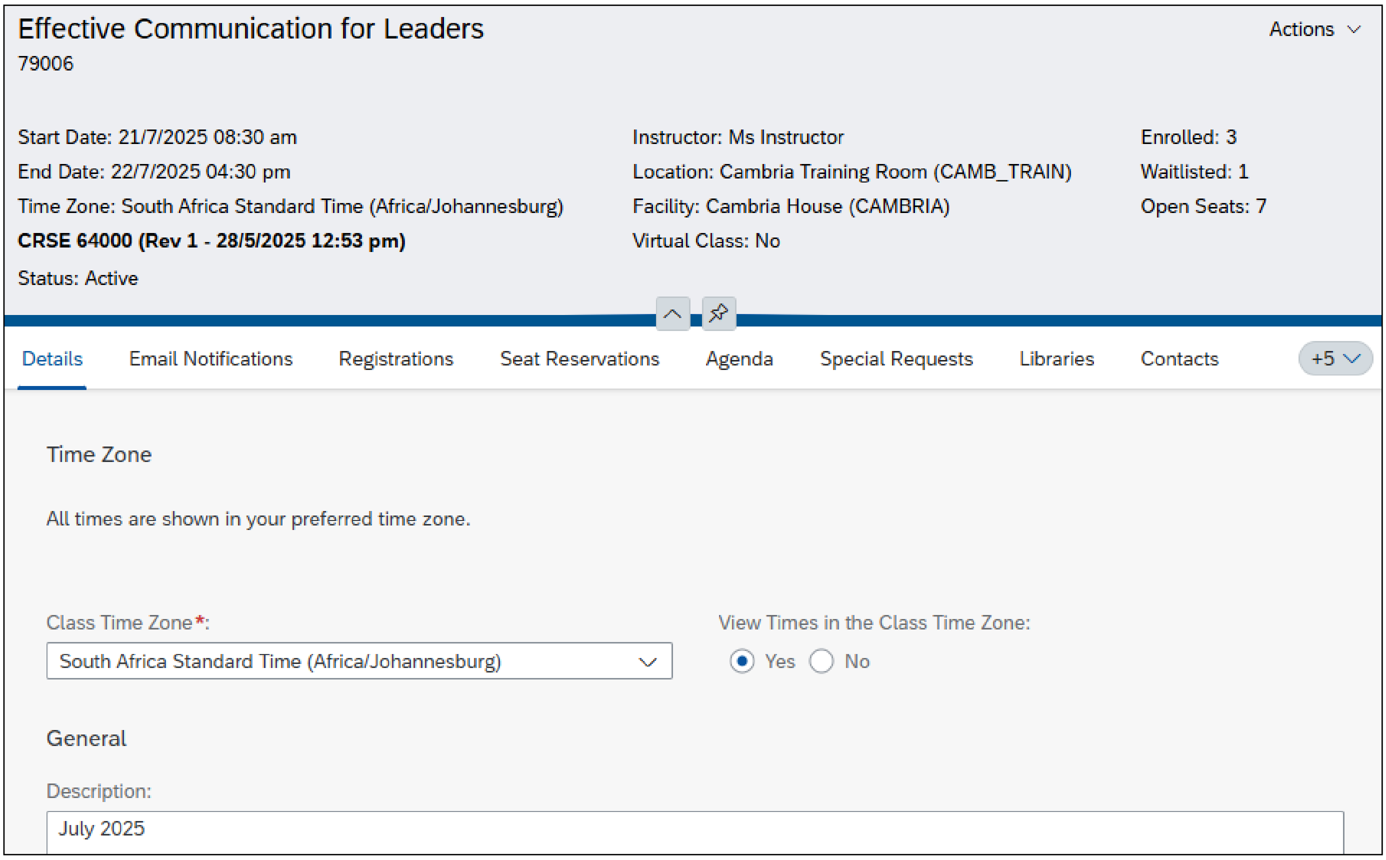
Viewing class registration form information

Background

This procedure is used to display the UCT custom registration fields (i.e. fund number, cost centre, email address of fund holder, dietary requirements, food allergies or disability accommodation) completed by the learner when registering for the class. If the class registration form didn't include any UCT custom fields, there will be no information to display.

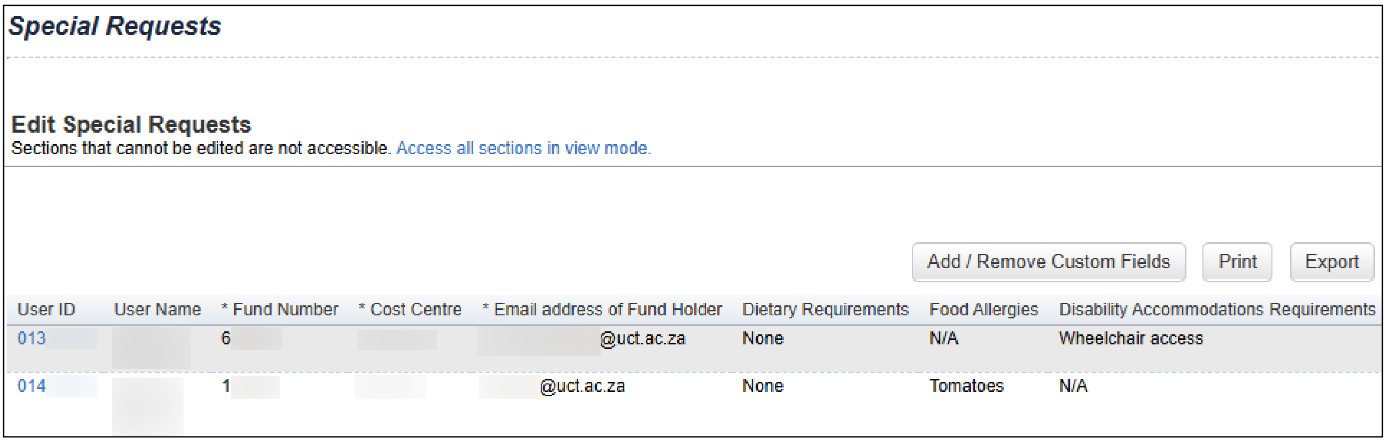
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate class.



- In the *class* menu, click *Special Requests*.

3. The *Special Requests* page appears.

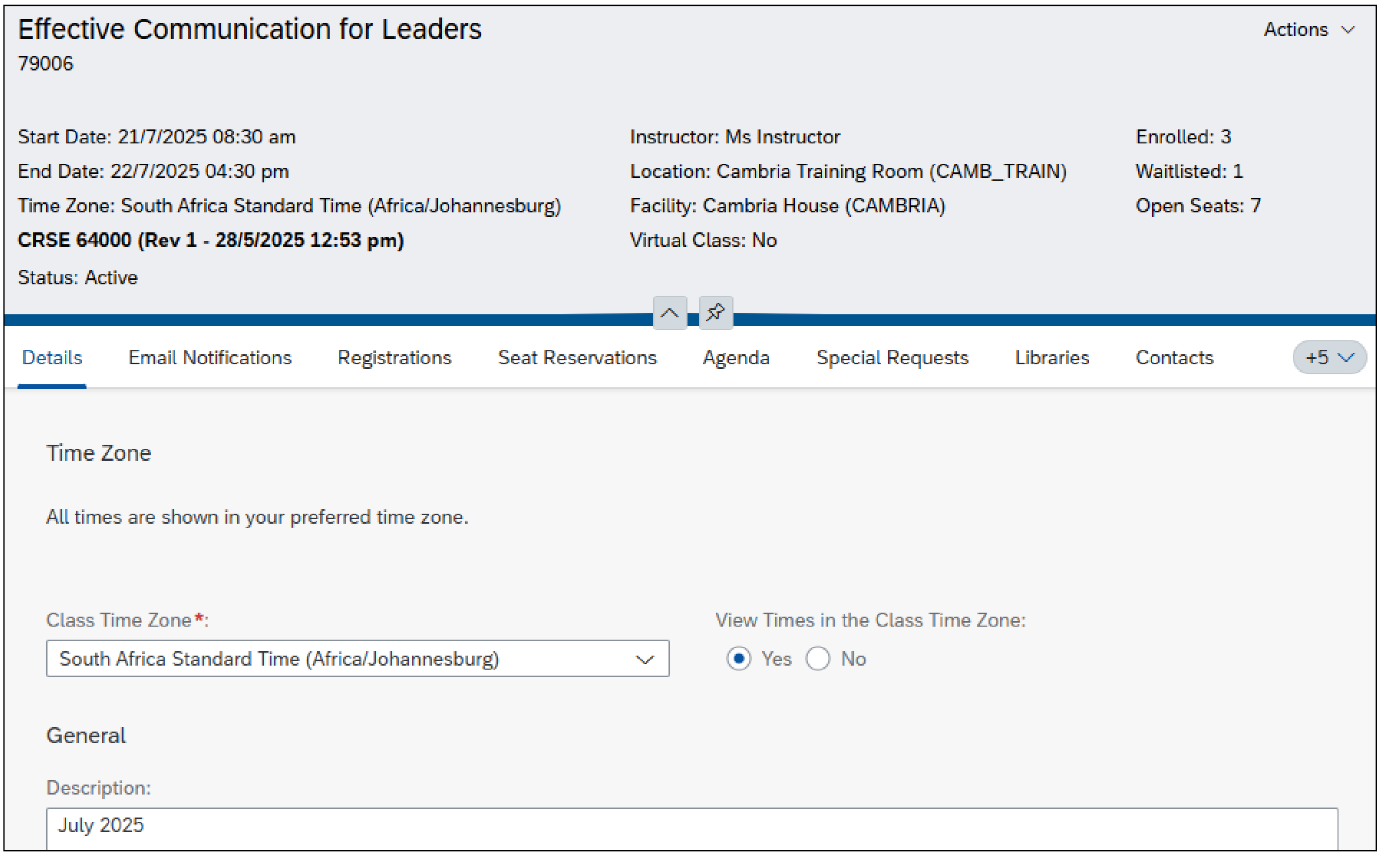


- Any learners with pending, waitlisted, or cancelled registrations will also appear in the list.
- Any learner registrations added by the Learning Administrator will not have registration form information as the manual registration process bypasses the completion of the registration form.

Viewing and printing a class roster

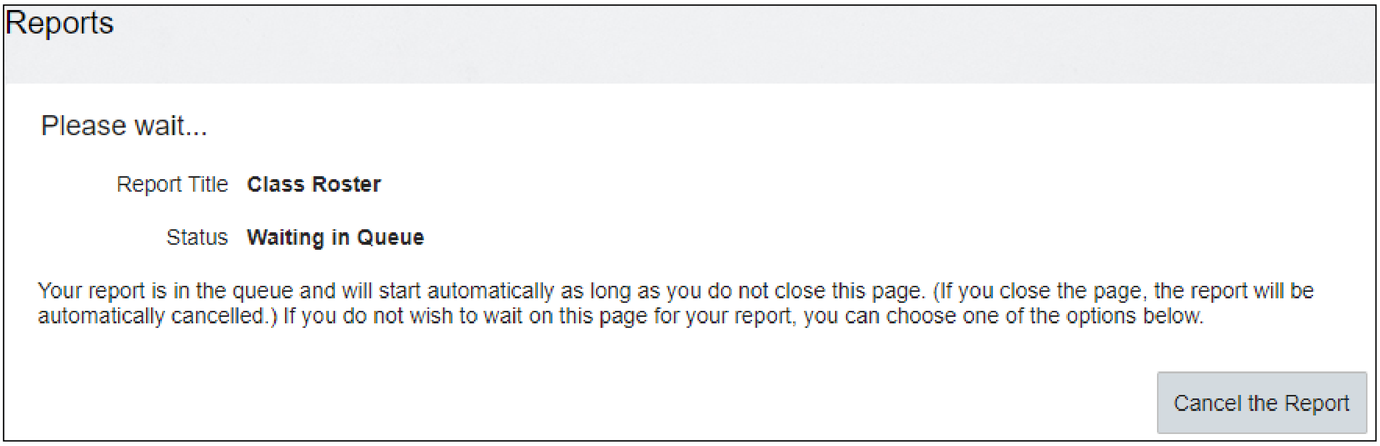
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate class.



- In the *Actions* menu (top right), choose *View Roster*.

3. The *Reports* page appears in a new browser tab.



- When the report is available, the page will automatically refresh and the *Status* will show as *Succeeded*.
- Open the report.pdf file from within your browser.

Viewing and printing a class roster (continued)

4. The *Class Roster* opens in a new browser tab.

SAP SuccessFactors

Class Roster

Class

Class ID	79006
Title	Effective Communication for Leaders
Item	CRSE 64000 (Rev 28/5/2025 12:53 PM Africa/Johannesburg)

Time Slot	Start Date/Time	End Date/Time	Instructor	Primary Location
1	21/7/2025 08:30 AM Africa/Johannesburg	21/7/2025 04:30 PM Africa/Johannesburg	Instructor, Ms	Cambria Training Room
2	22/7/2025 08:30 AM Africa/Johannesburg	22/7/2025 04:30 PM Africa/Johannesburg	Instructor, Ms	Cambria Training Room

User Name	User ID	Manager	Manager ID	Signature	Date
[illegible]	*********	[illegible]	*********		
[illegible]	*********	[illegible]	*********		
[illegible]	*********	[illegible]	*********		
[illegible]	*********	[illegible]	*********		

- Print or download the PDF file as required.
- Close the additional browser tabs until the class *Details* page reappears.

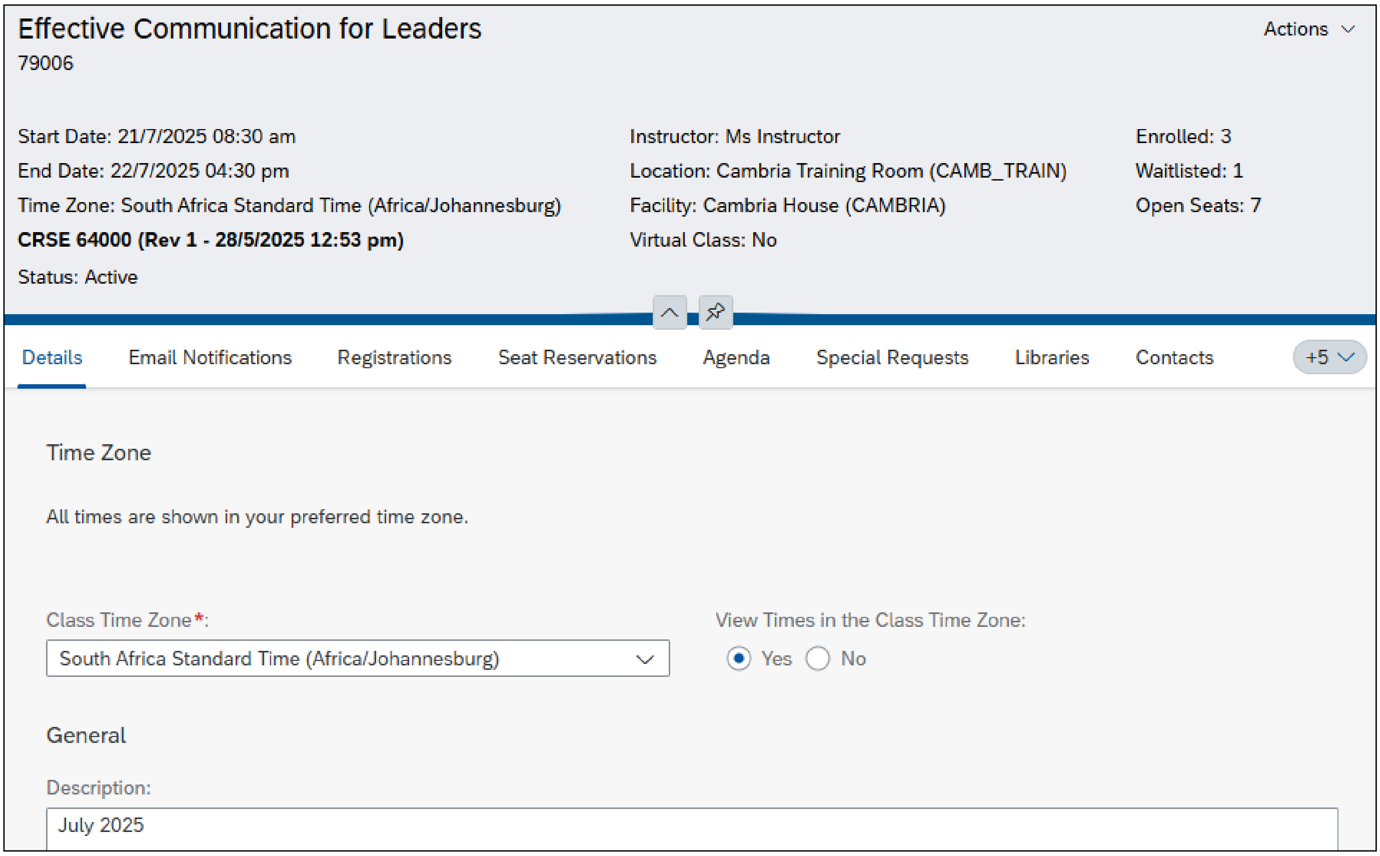
Creating a block booking / seat reservation

Background

A seat reservation is a space reserved for un-named learners from a specific organisational unit.

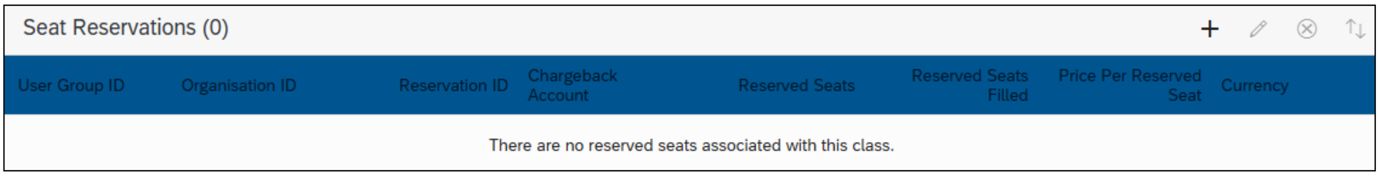
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate class.



- In the class menu, click *Seat Reservations*.

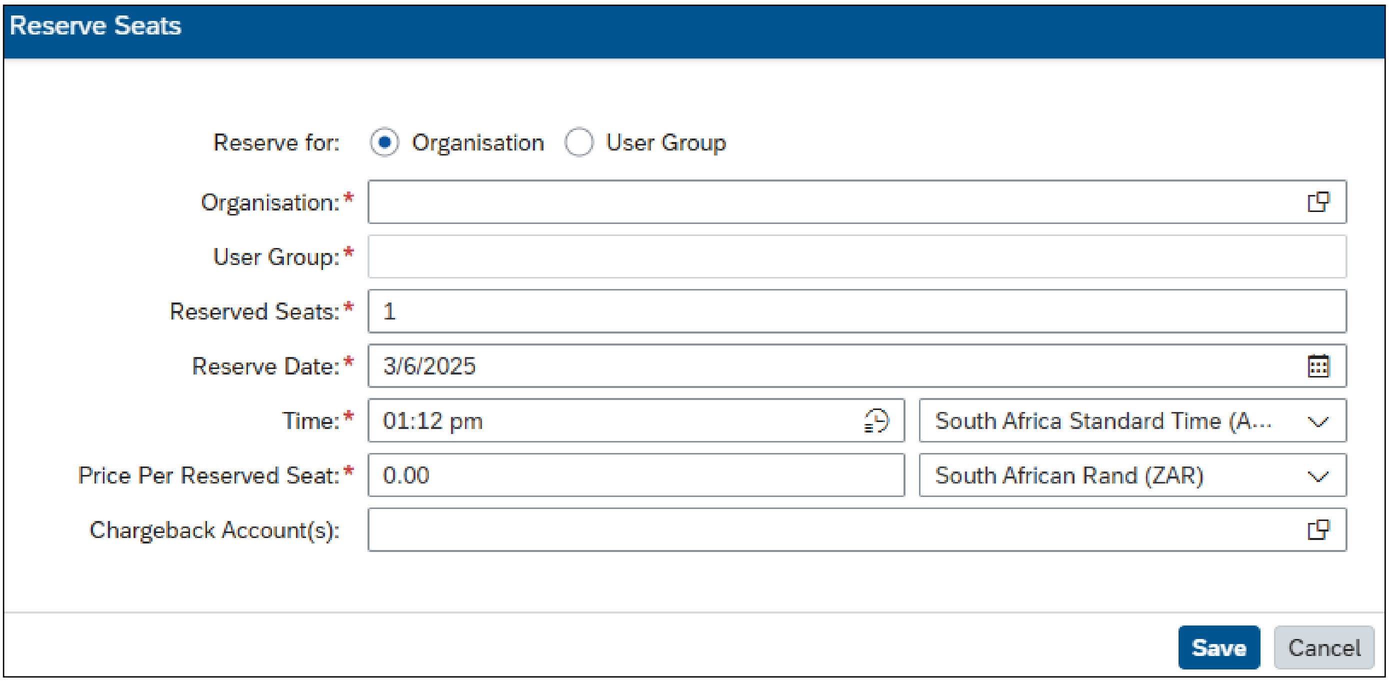
3. The *Seat Reservations* page appears.



- Click + *Add*.

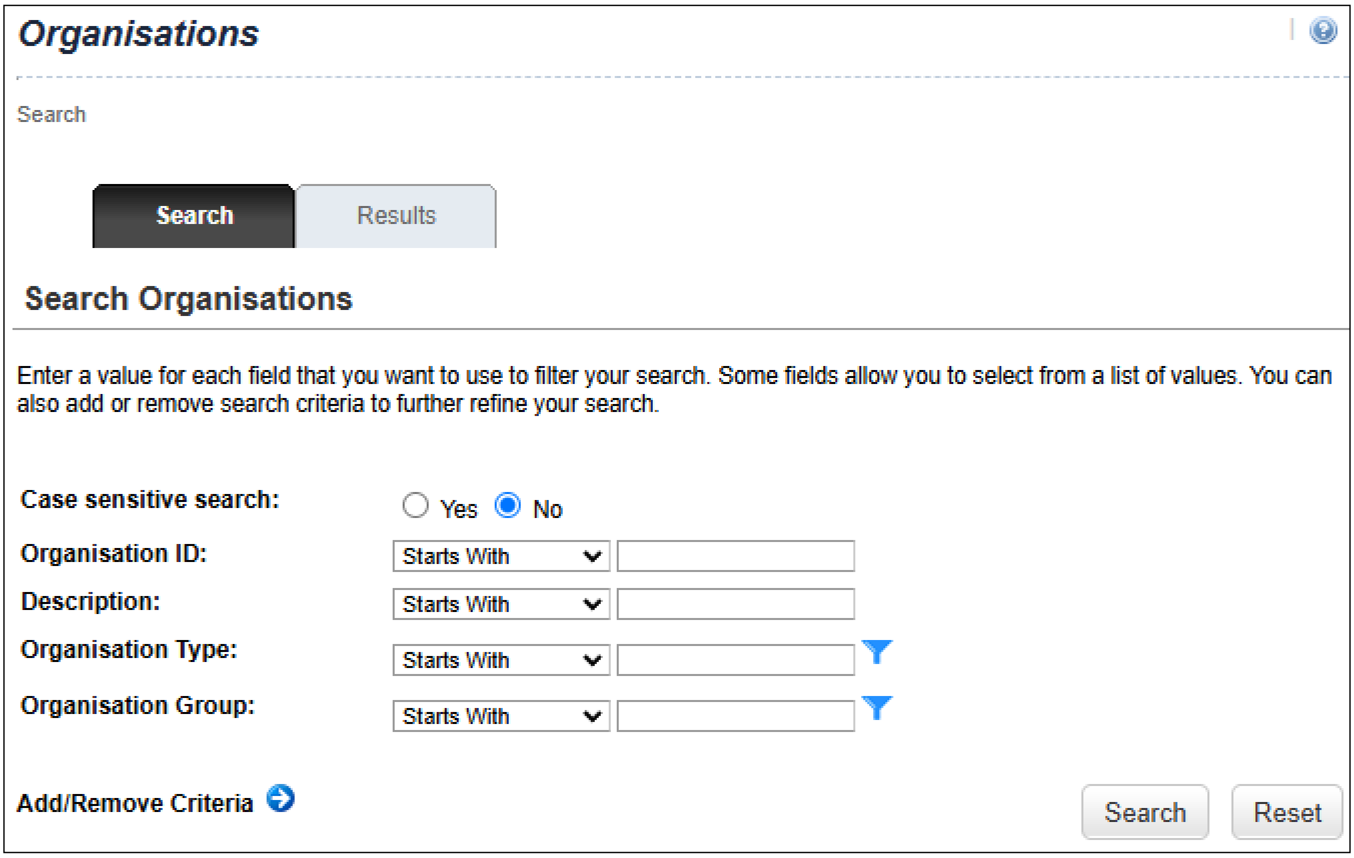
Creating a block booking / seat reservation (continued)

4. The *Reserve Seats* dialogue box appears.



- In the *Organisation* field, click .

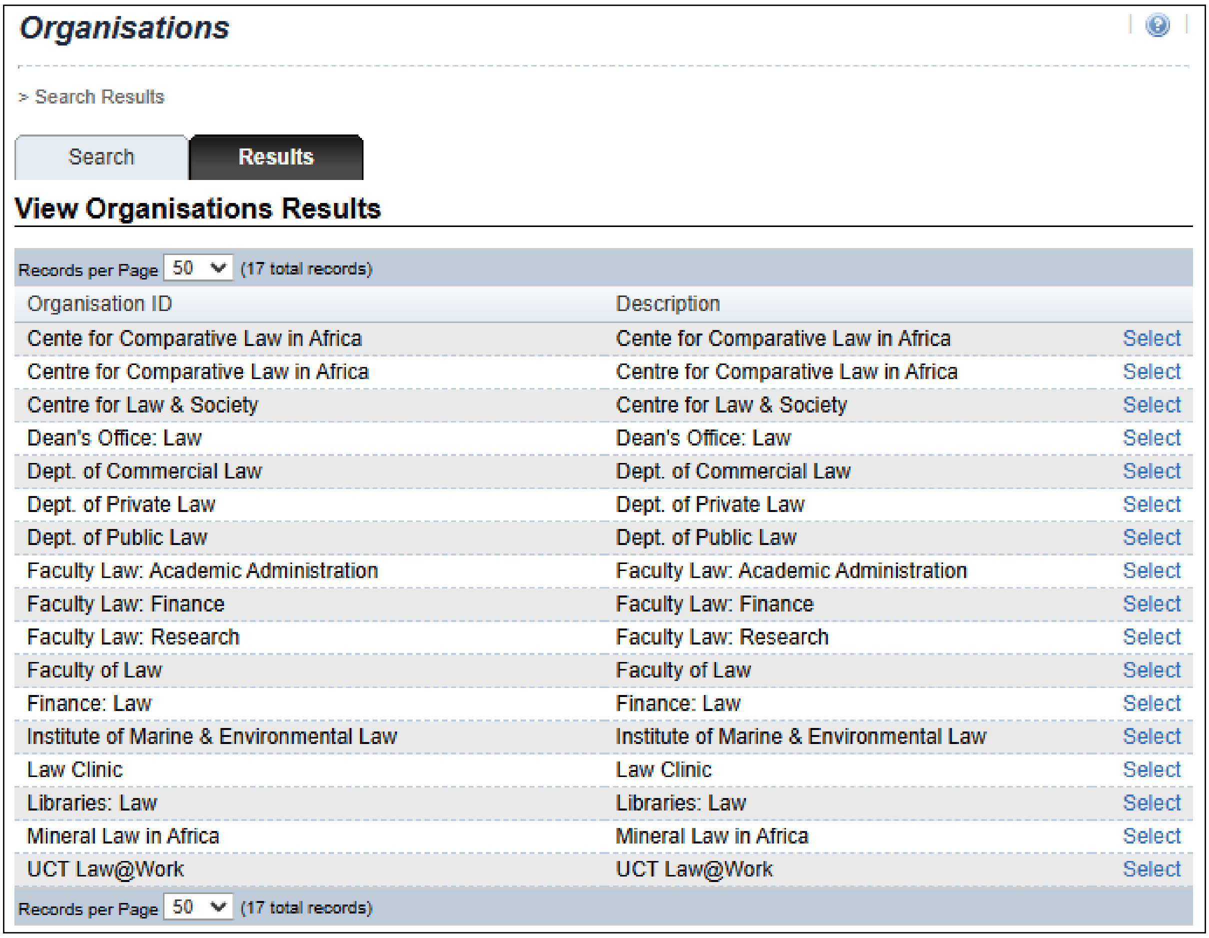
5. The *Organisations* dialogue box appears.



- For *Description*, change the search from *Starts With* to *Contains*. This expands the search to look for the search term anywhere in the organisational unit description text.
- In the *Description* field, enter part of the organisational unit name e.g. Law.
- Click Search.

Creating a block booking / seat reservation (continued)

- The search results appear in the *Organisations* dialogue box.



Organisations

> Search Results

Search | Results

View Organisations Results

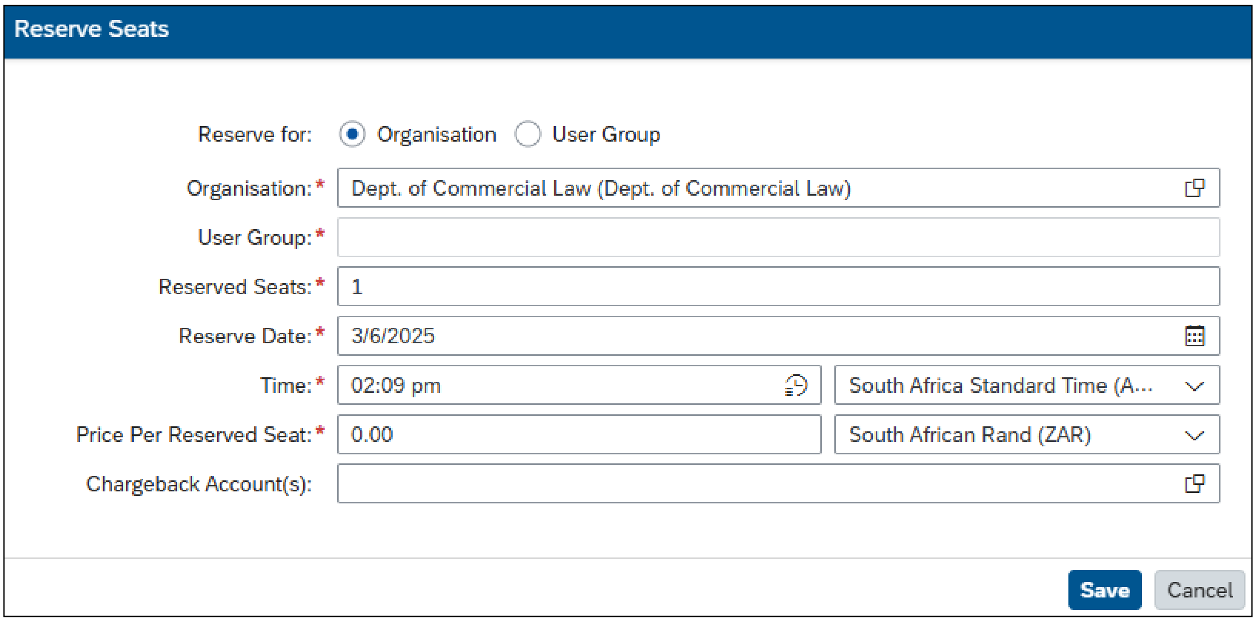
Records per Page 50 (17 total records)

Organisation ID	Description	
Cente for Comparative Law in Africa	Cente for Comparative Law in Africa	Select
Centre for Comparative Law in Africa	Centre for Comparative Law in Africa	Select
Centre for Law & Society	Centre for Law & Society	Select
Dean's Office: Law	Dean's Office: Law	Select
Dept. of Commercial Law	Dept. of Commercial Law	Select
Dept. of Private Law	Dept. of Private Law	Select
Dept. of Public Law	Dept. of Public Law	Select
Faculty Law: Academic Administration	Faculty Law: Academic Administration	Select
Faculty Law: Finance	Faculty Law: Finance	Select
Faculty Law: Research	Faculty Law: Research	Select
Faculty of Law	Faculty of Law	Select
Finance: Law	Finance: Law	Select
Institute of Marine & Environmental Law	Institute of Marine & Environmental Law	Select
Law Clinic	Law Clinic	Select
Libraries: Law	Libraries: Law	Select
Mineral Law in Africa	Mineral Law in Africa	Select
UCT Law@Work	UCT Law@Work	Select

Records per Page 50 (17 total records)

- To view more search results, either change the number of *Records per Page* using the dropdown arrow or click Next».
- Click Select alongside the appropriate organisational unit.

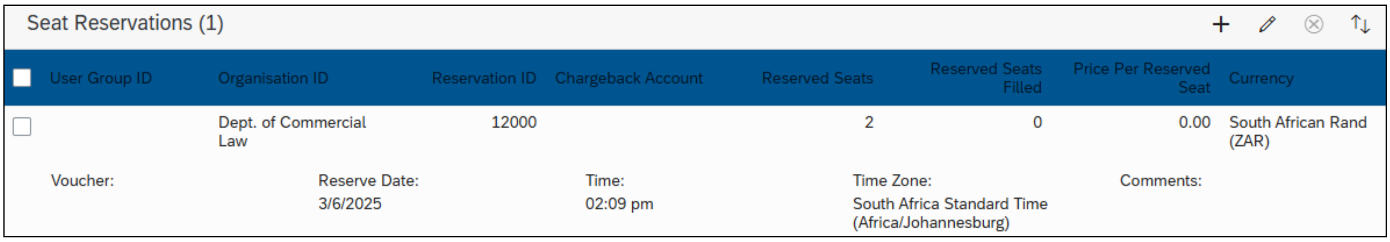
6. The *Reserve Seats* dialogue box reappears, displaying the selected organisational unit.



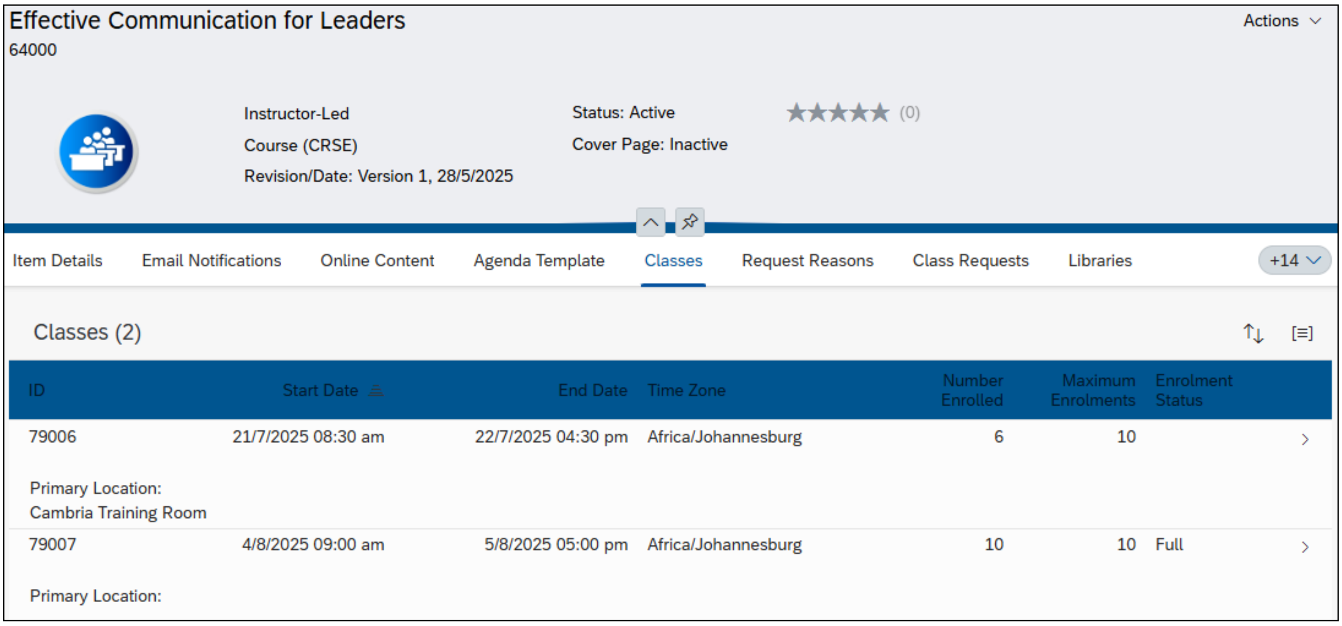
- If applicable, change the number of *Reserved Seats*.
- Click Save.

Creating a block booking / seat reservation (continued)

7. The *Seat Reservations* page reappears, displaying the new seat reservation.



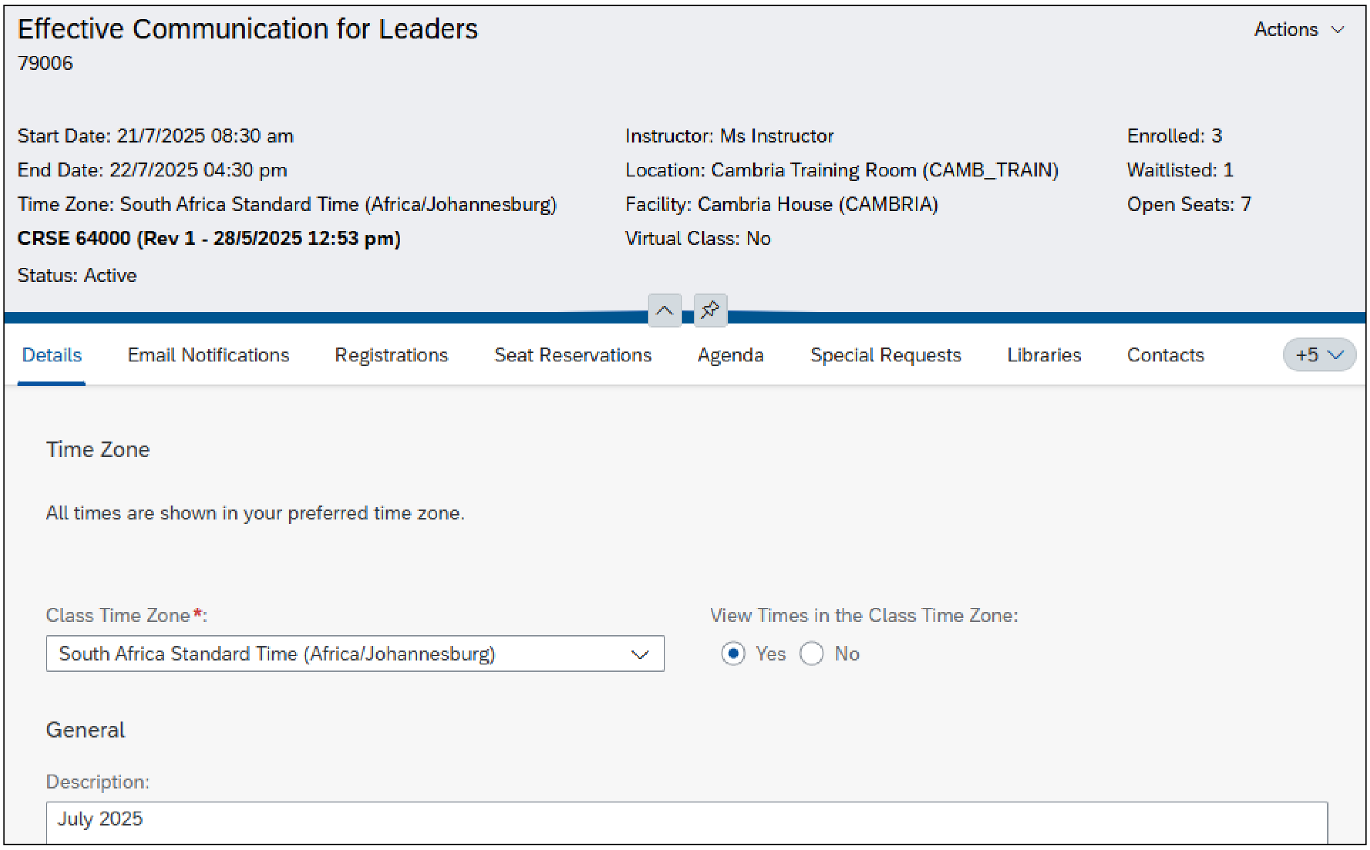
- To make changes to the reservation or add *Comments* (e.g. contact person or email address), click *Edit*. When changes are complete, click Save.
- Seat reservations and registrations are combined when viewing total enrolments for a class (e.g. 2 seat reservations plus 4 registrations equal 6 enrolments of the maximum 10 below).



Removing a block booking / seat reservation

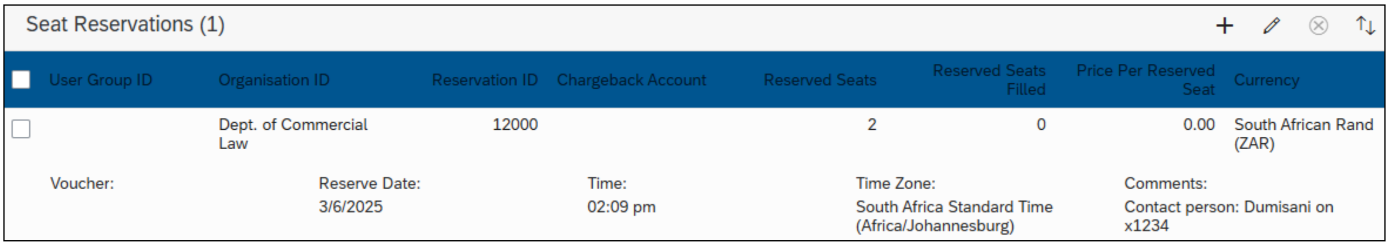
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate class.

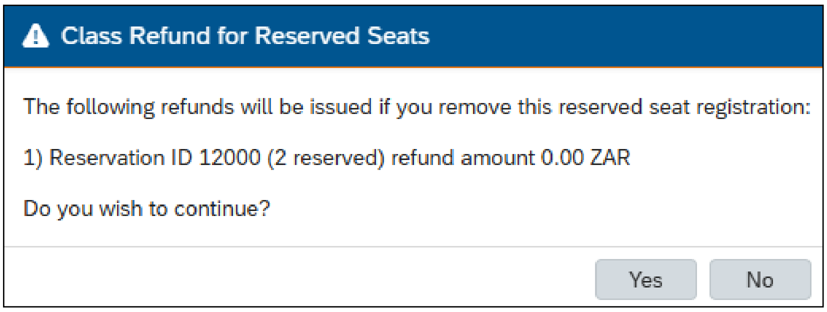


- In the class menu, click *Seat Reservations*.

3. The *Seat Reservations* page appears.



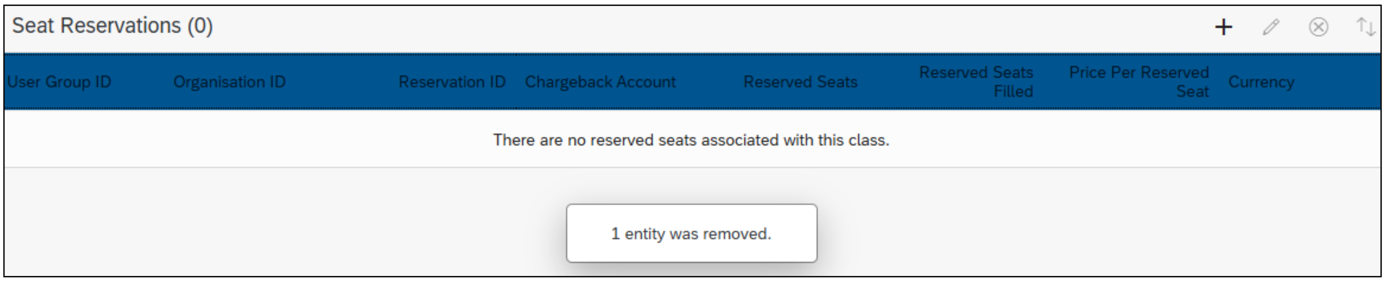
- Select the seat reservation to remove by clicking the check box in the applicable row.
  Note: Using the check box to the left of *User Group ID* will select all seat reservations.
- Click *Remove*.
- The *Class Refund for Reserved Seats* dialogue box appears.



- Click Yes.

Removing a block booking / seat reservation (continued)

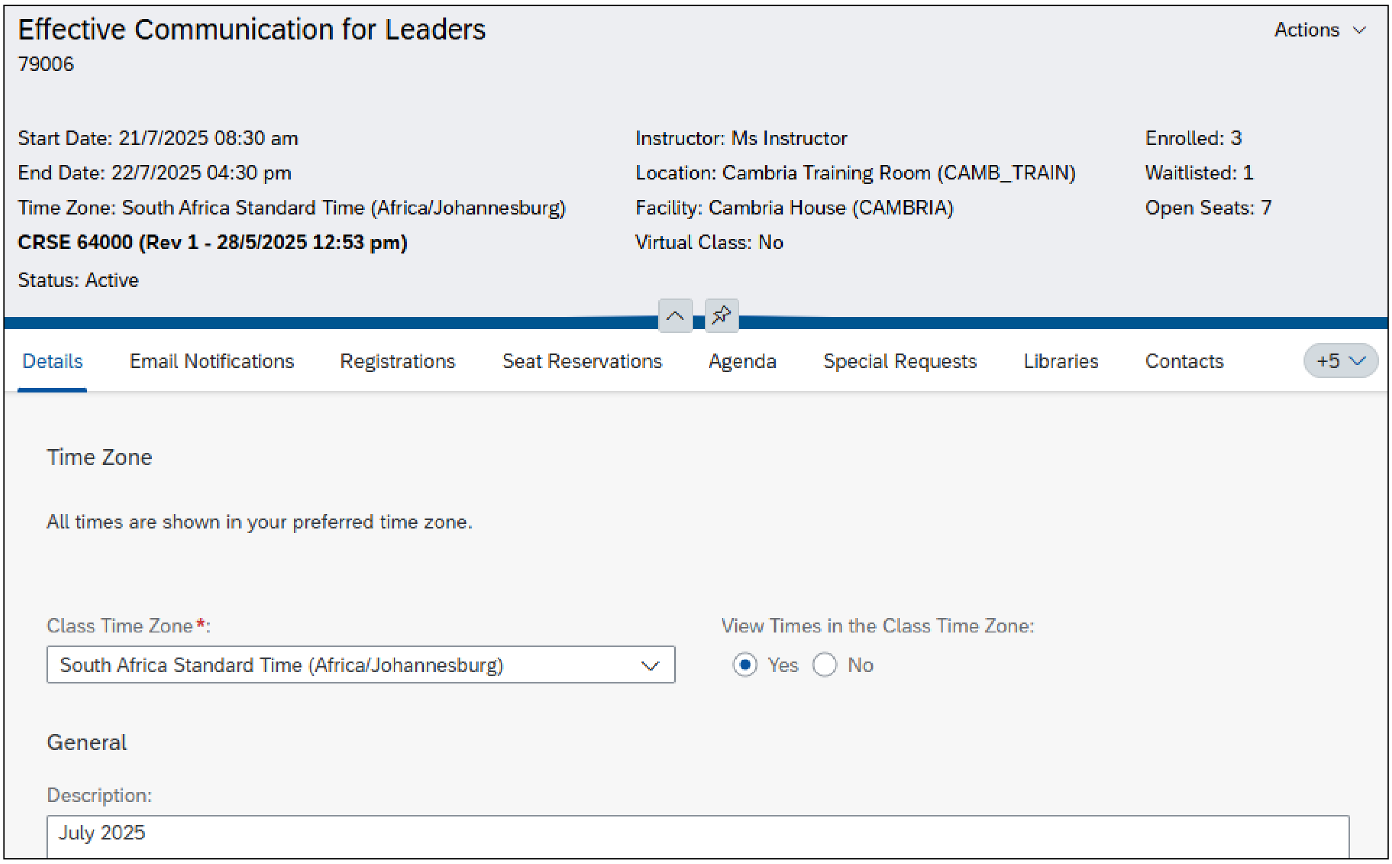
4. The *Seat Reservations* page reappears, a message indicates that the entity was removed.



Changing a class instructor

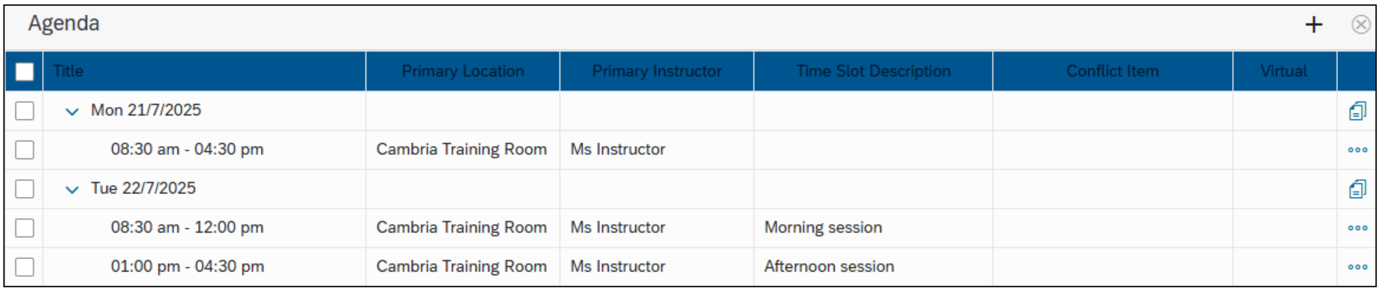
Procedure

1. [Log in to SuccessFactors and access the *Learning Administration* page](#).
2. [Search for the appropriate class](#).



- In the *class* menu, click *Agenda*.

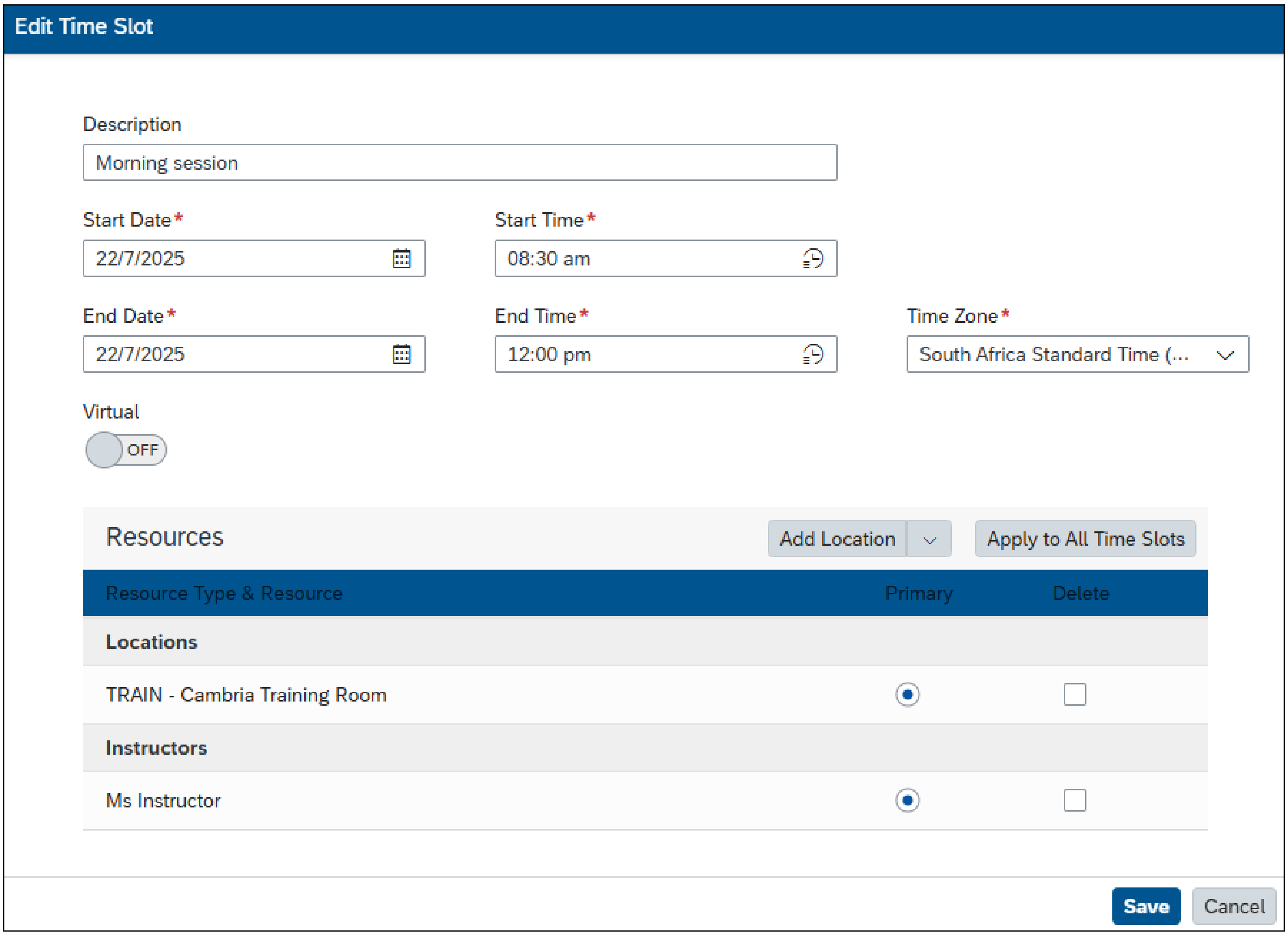
3. The *Agenda* page appears.



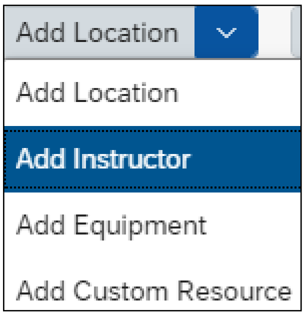
- Click ∘∘∘ *More* alongside the appropriate day or time slot and choose *Edit Time Slot*.

Changing a class instructor (continued)

4. The *Edit Time Slot* dialogue box appears.

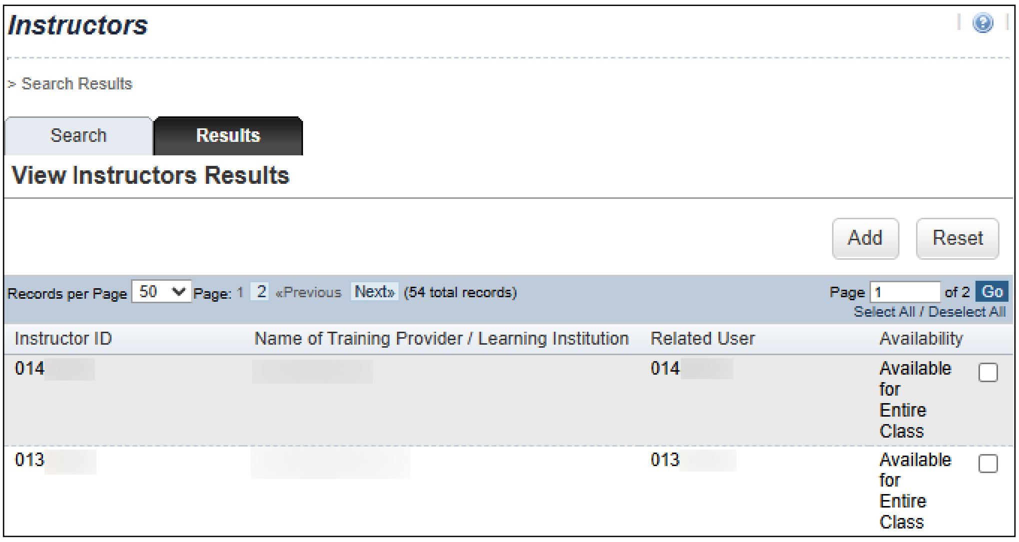


- In the *Resources* section, click the arrow alongside *Add Location* and choose *Add Instructor*.



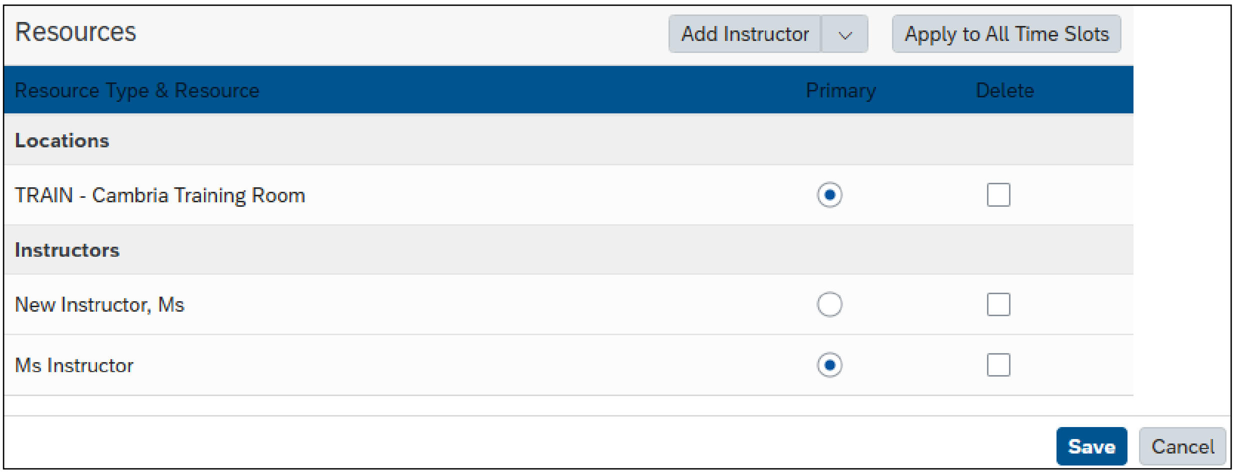
Changing a class instructor (continued)

5. The *Instructors* dialogue box appears, listing all instructors.
   Note: If the class has authorised instructors, a shorter list of instructors will appear.

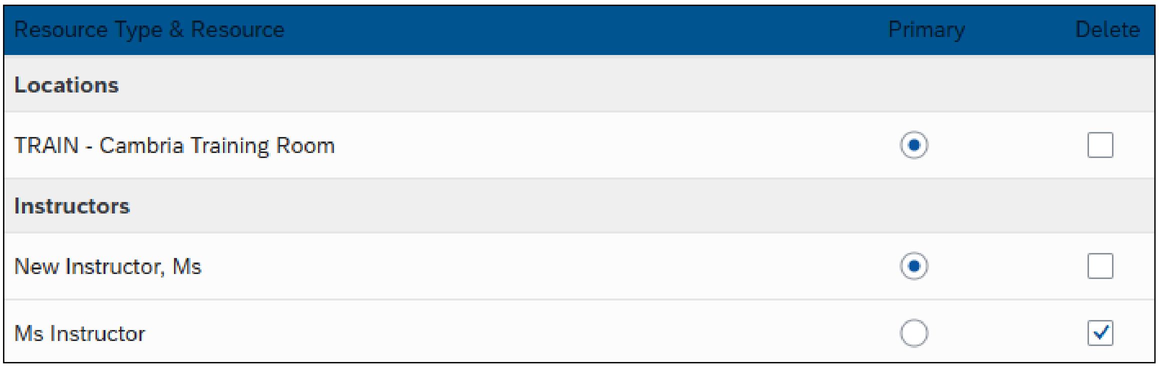


- To view more search results, either change the number of *Records per Page* using the dropdown arrow or click Next» to view additional results.
- Select the new instructor using the check box.
- Click Add.

6. The *Edit Time Slot* dialogue box reappears, with the new instructor added to the *Resources* section.



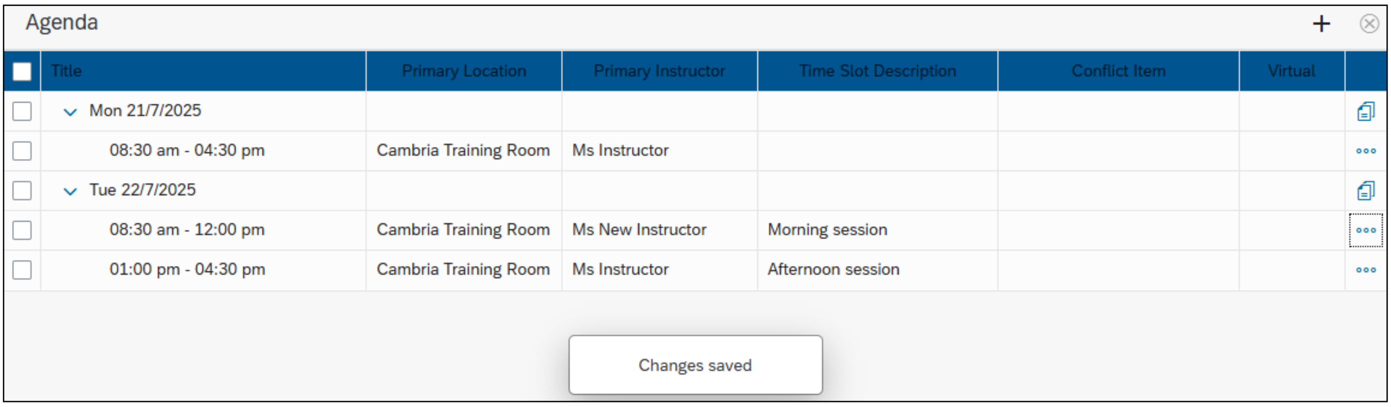
- Set the new instructor as the *Primary* instructor using the radio button.
- Delete the previous instructor by selecting the *Delete* check box.



- Click Save.

Changing a class instructor (continued)

7. The *Agenda* page reappears, a message indicates the changes were saved.

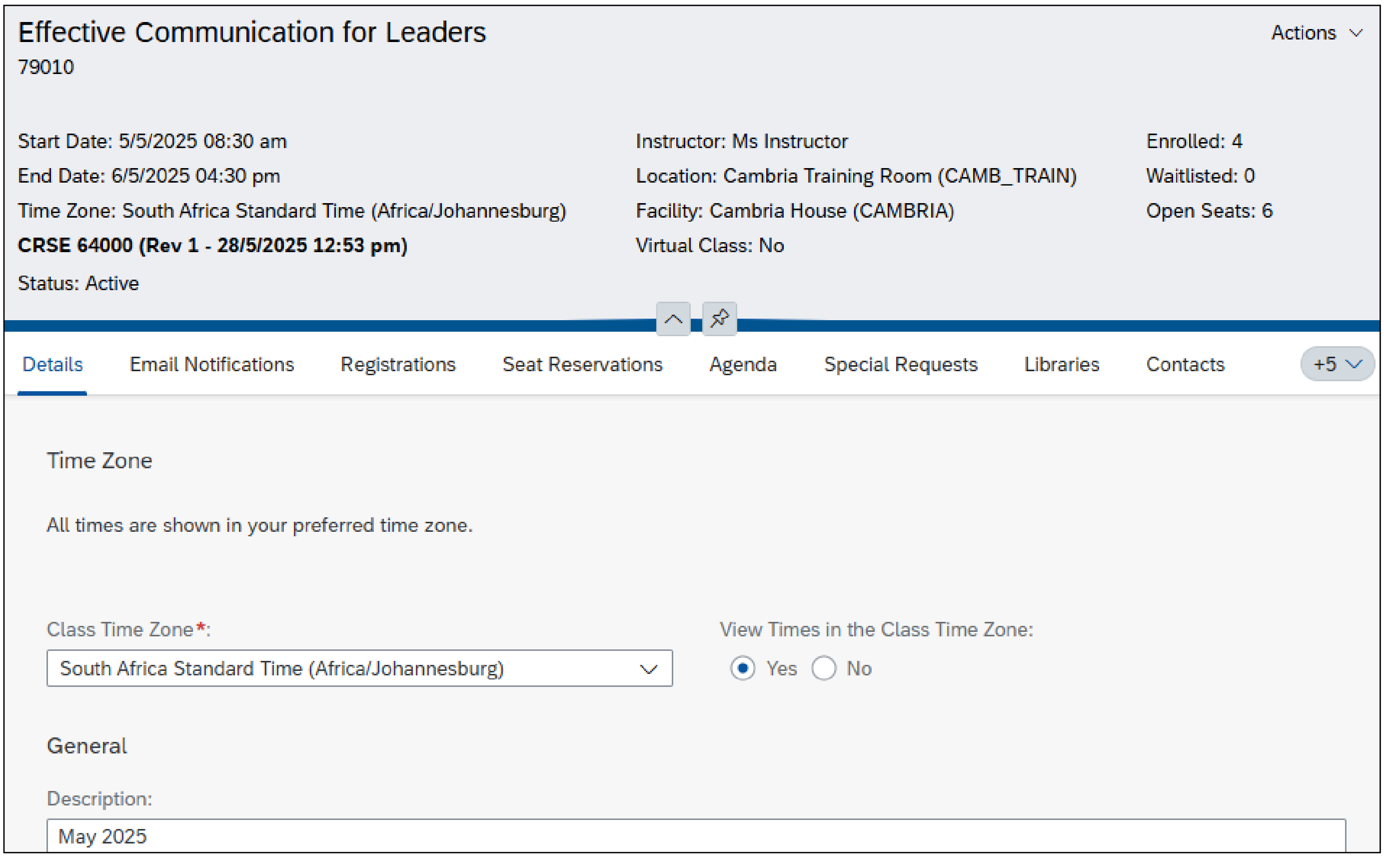


- To change the instructor for any additional time slots, repeat from step 3.

Recording learning after a completed class

Procedure

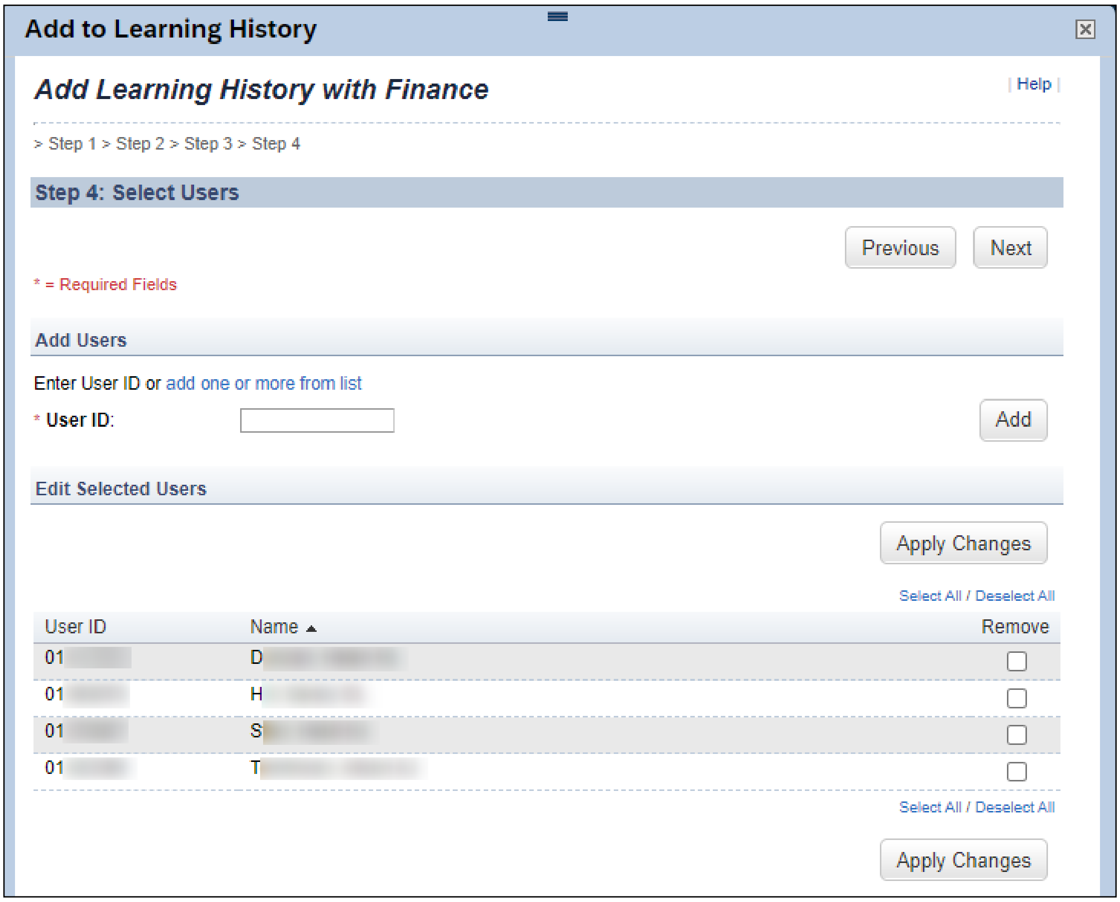
1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate class.



- In the *Actions* menu (top right), choose *Add to Learning History*.

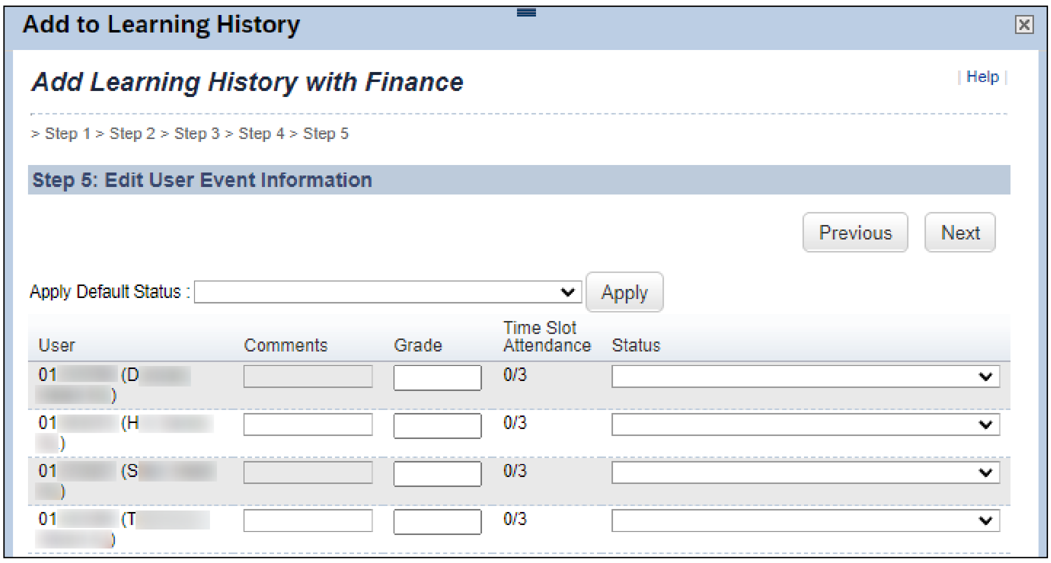
Recording learning after a completed class (continued)

3. The *Add to Learning History* dialogue box appears, listing all registered learners for the class.



- If any learners should be removed (and therefore not have the learning recorded), select the appropriate checkbox in the *Remove* column and click Apply Changes.
- To proceed with recording the learning for the listed learners, click Next.

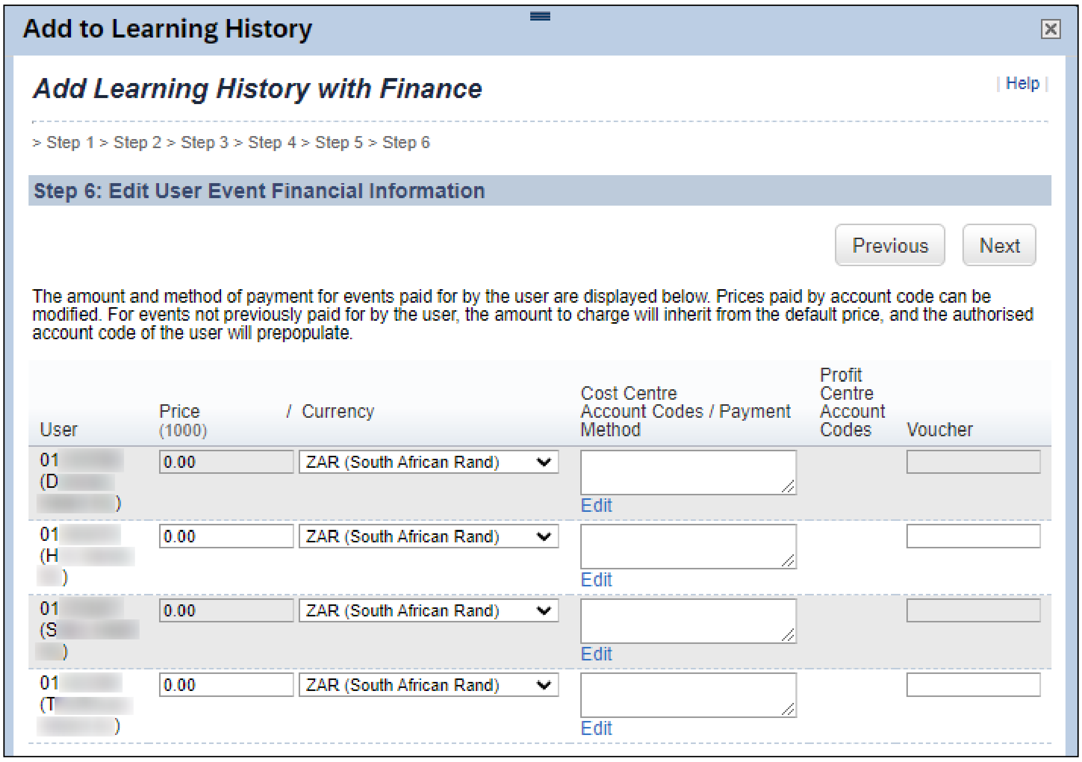
4. The *Add to Learning History* dialogue box reappears, allowing for capture of event information.



- Either select an option for all learners in the *Apply Default Status* field and click Apply or select a *Status* for each learner in the *Status* column.
- Click Next.

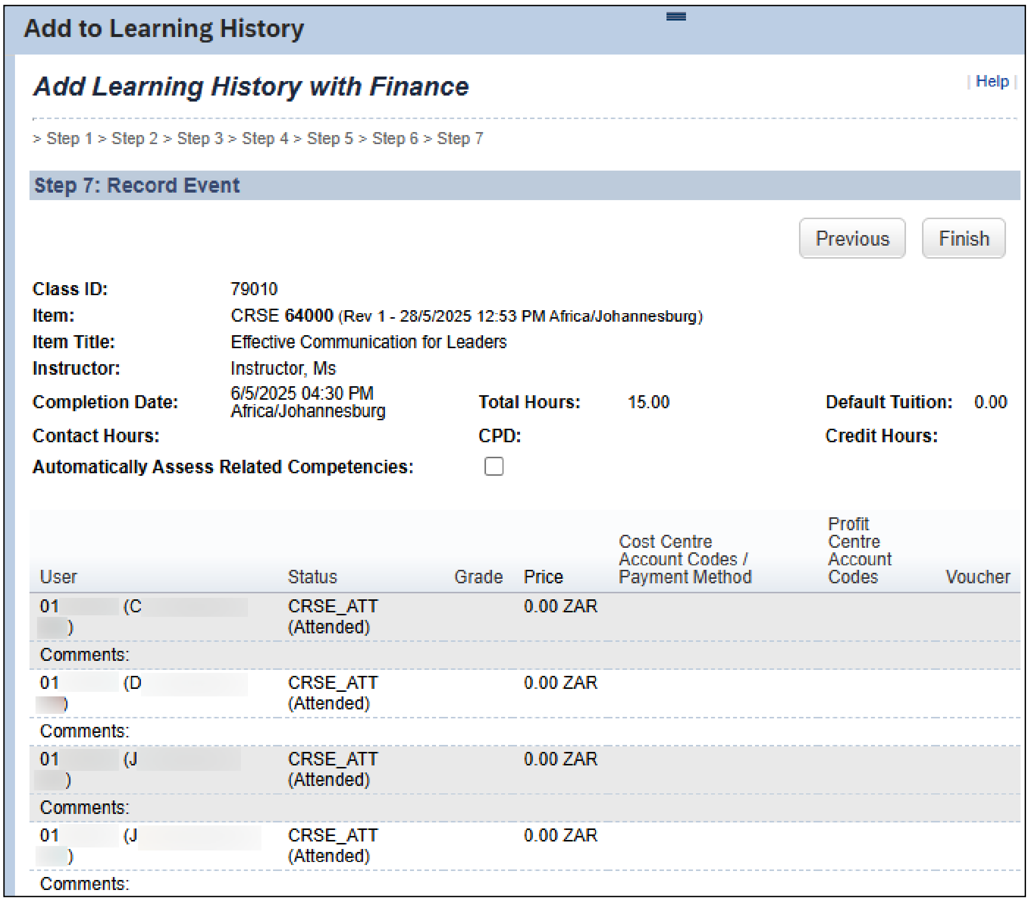
Recording learning after a completed class (continued)

5. The *Add to Learning History* dialogue box reappears, displaying financial information.



- Click Next.

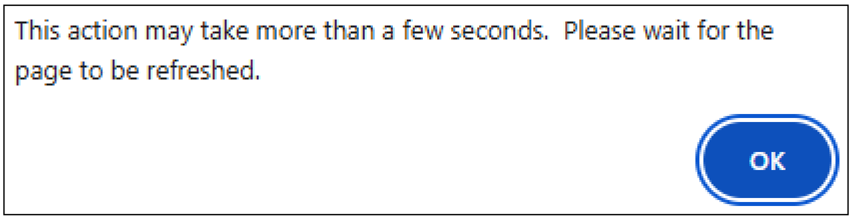
6. The *Add to Learning History* dialogue box reappears, displaying the list of selected learners and their status.



- Click Finish.

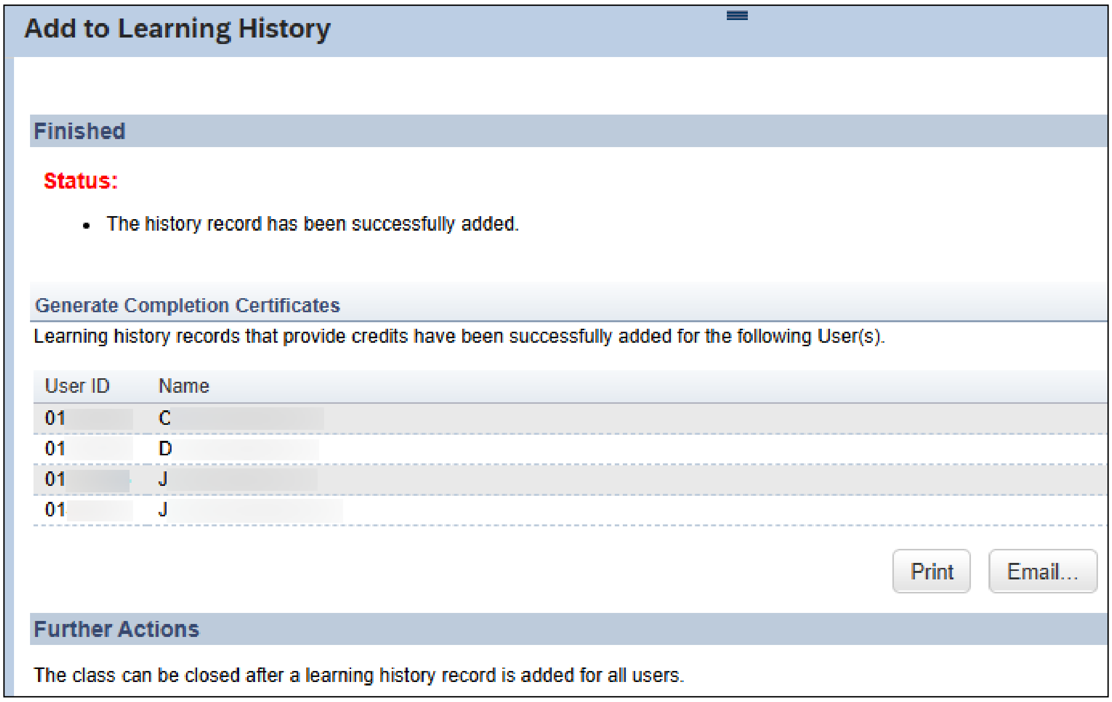
Recording learning after a completed class (continued)

7. A system dialogue box appears.



- Click OK.

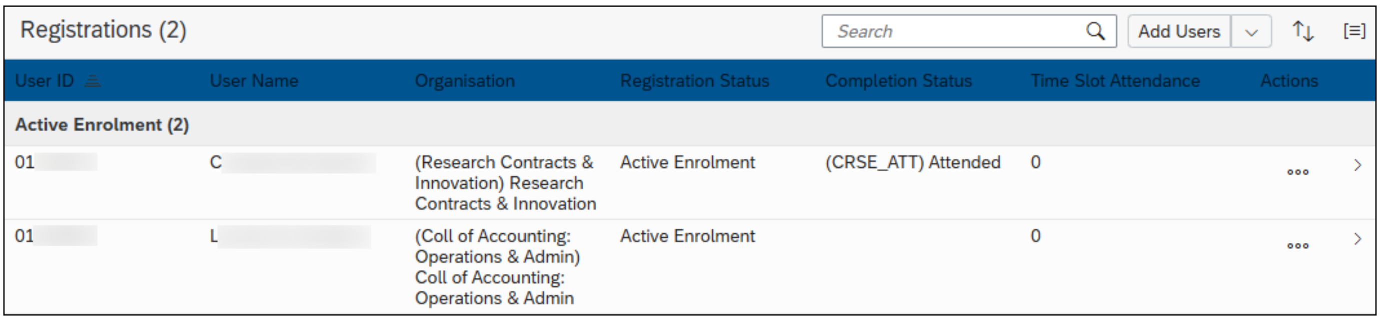
8. The *Add to Learning History* dialogue box reappears, indicating that the learning history record has been successfully added for the selected learners.



Note: If the item requires completion of a course feedback survey, the learners aren't listed and the certificates will not be generated until they complete the survey.

- If applicable, click Print to view, print or download the learner's certificate.
- Click ☒ *Close Add to Learning History Popup*.
- To check the registration status, click *Registrations* in the *class* menu.

9. The *Registrations* page appears.

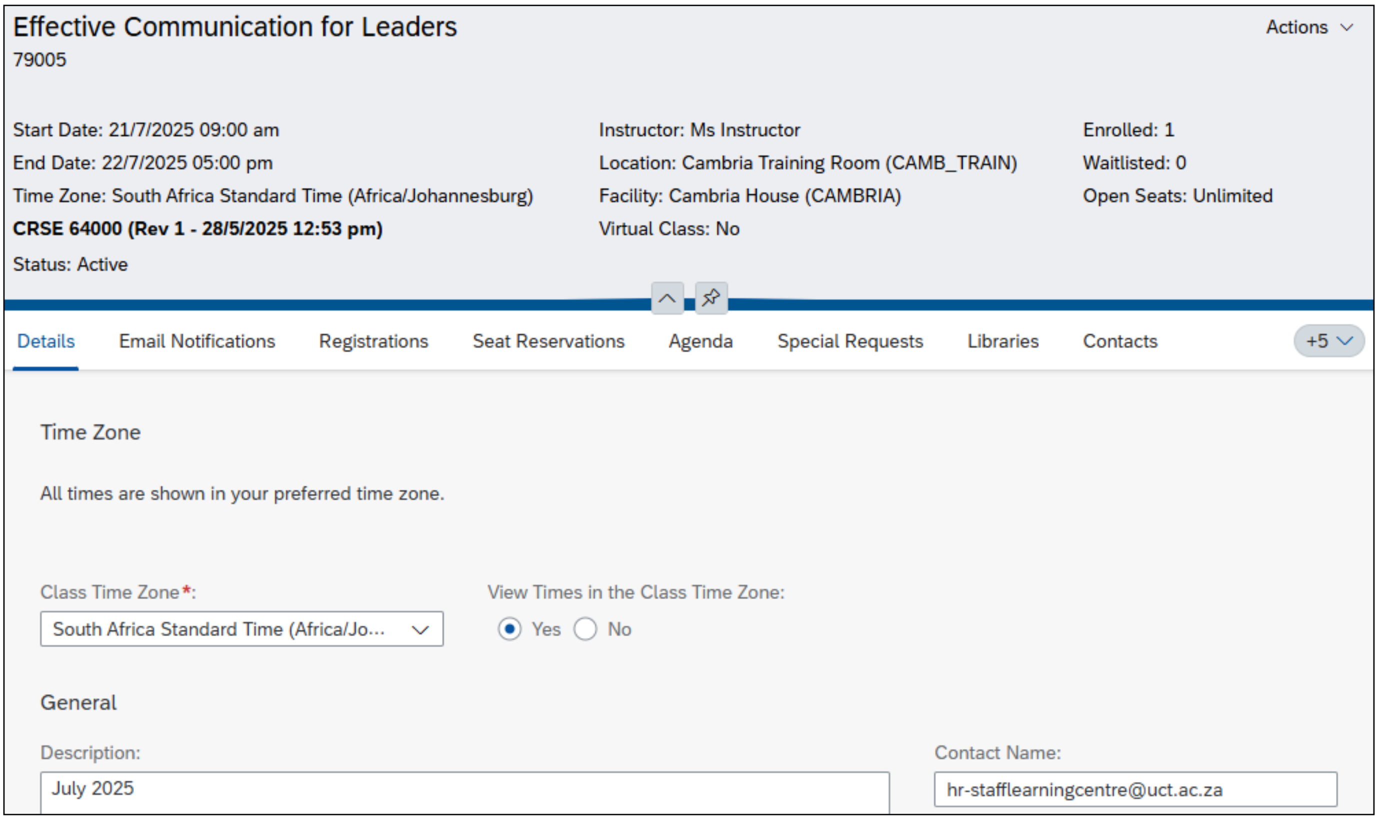


- If the learner's status has changed, it will appear in the *Status* column. If the *Status* column is blank, either there is no recorded learning for the learner or they are required to complete a survey before the class will be added to their learning history and a certificate will be generated.

Cancelling a class

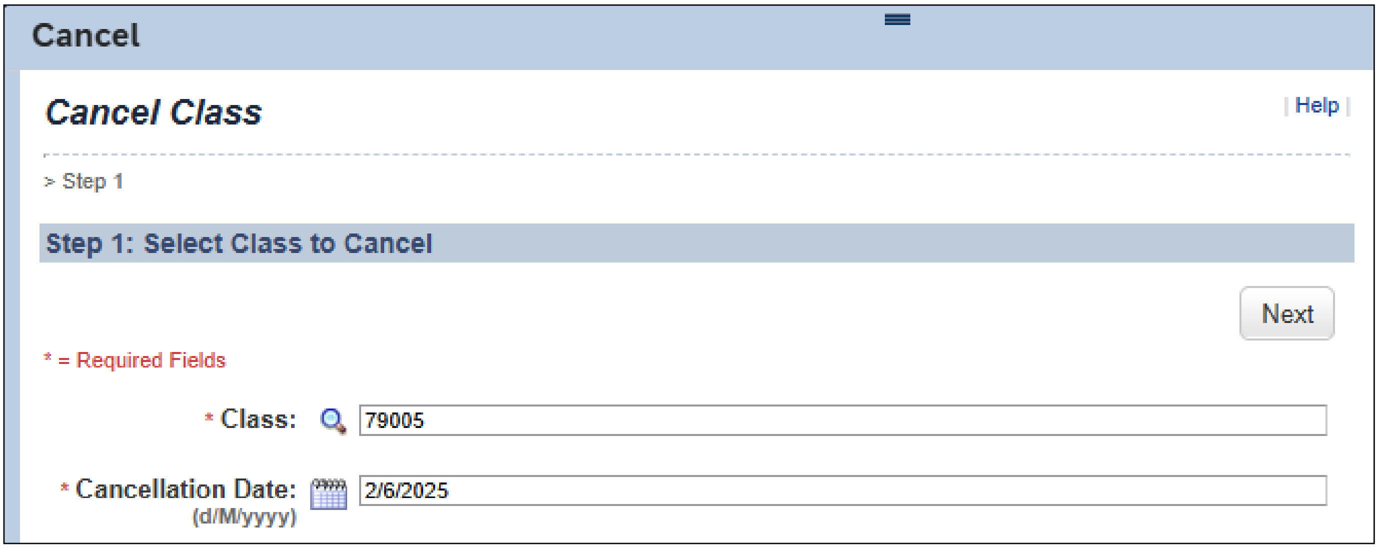
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate class.



- In the *Actions* menu (top right), choose *Cancel*.

3. The *Cancel* dialogue box appears.

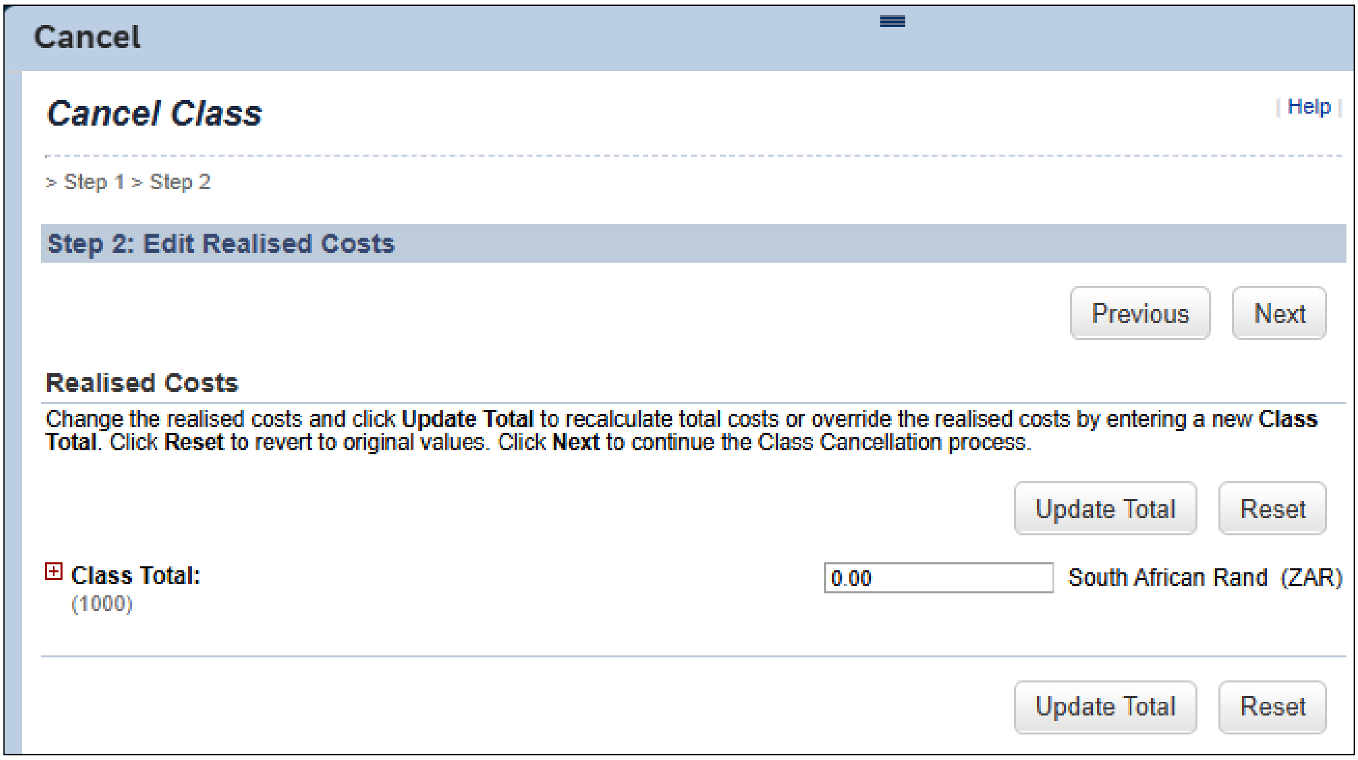


- Click 

.

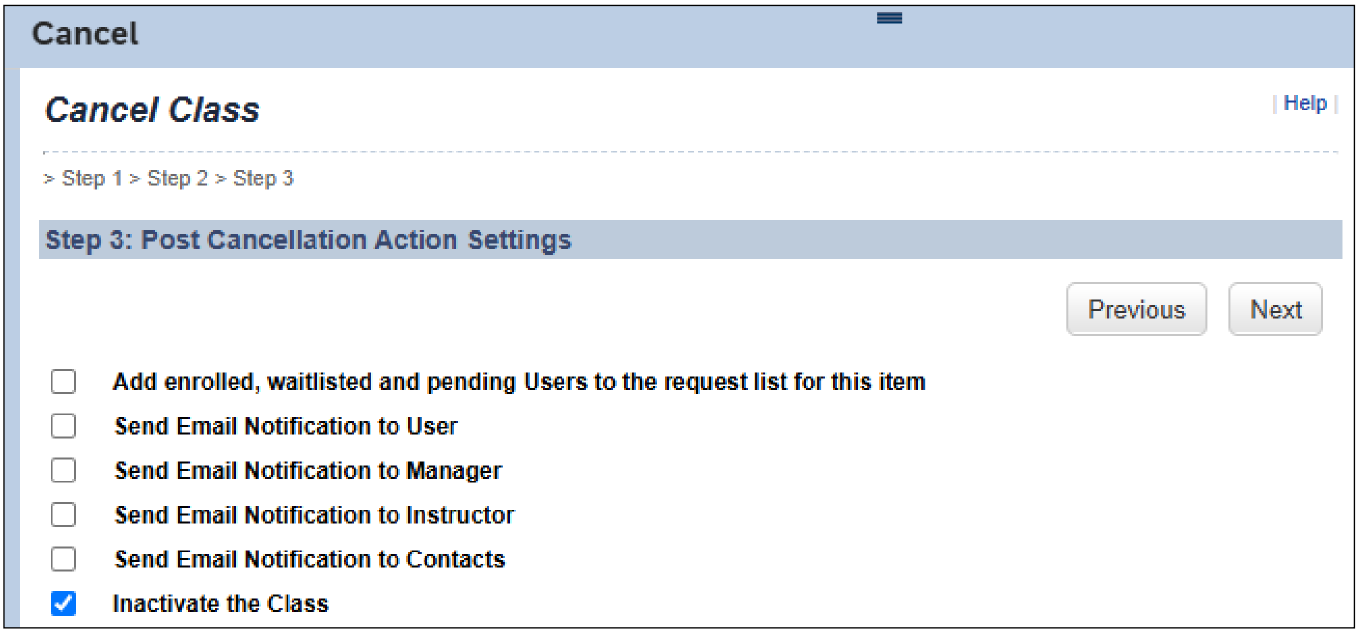
Cancelling a class (continued)

4. The *Cancel* dialogue box reappears, displaying realised costs.



- Click Next.

5. The *Cancel* dialogue box reappears, displaying post cancellation action settings

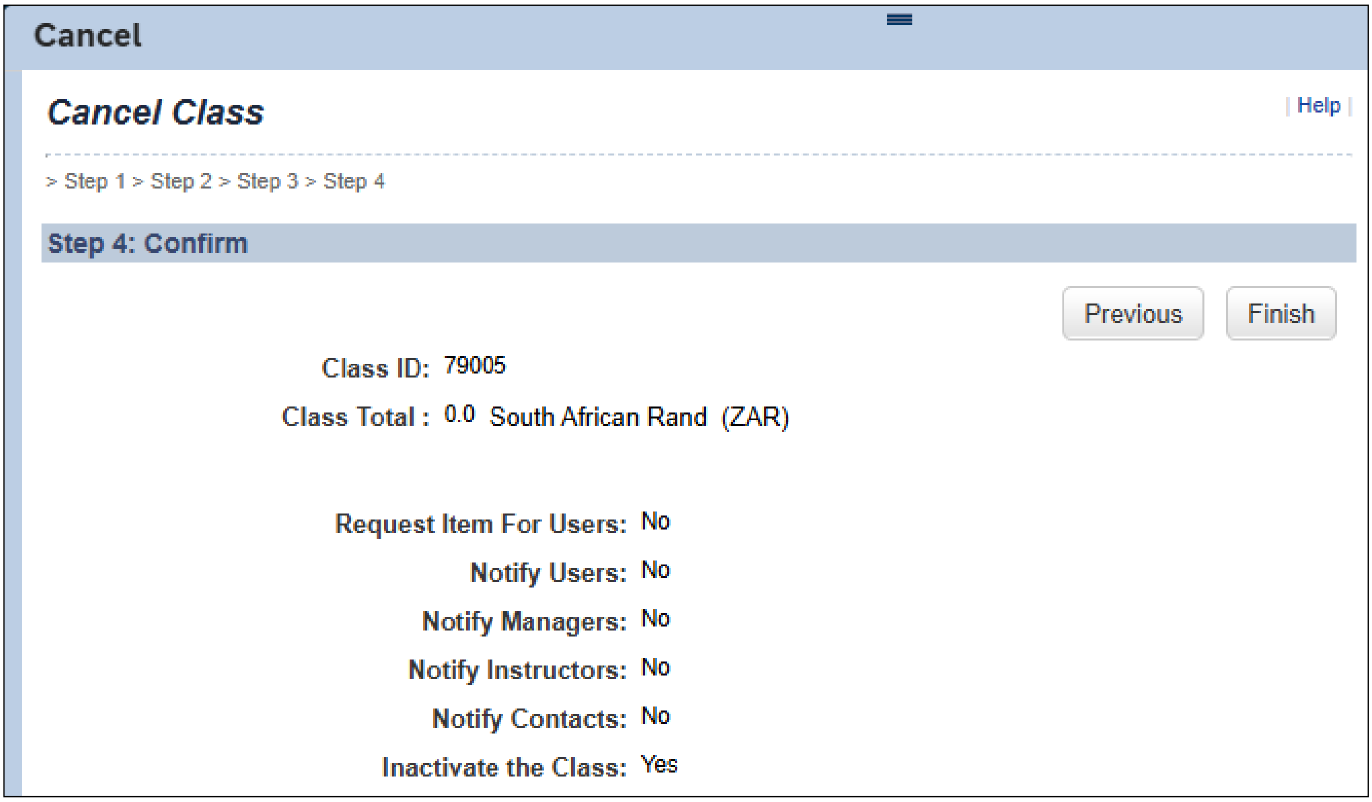


- Select the appropriate checkboxes e.g. *Add enrolled, waitlisted and pending Users to the request list for this item* will add learners from this class to the item request list so you can keep them in mind when scheduling a new class.

- Click Next.

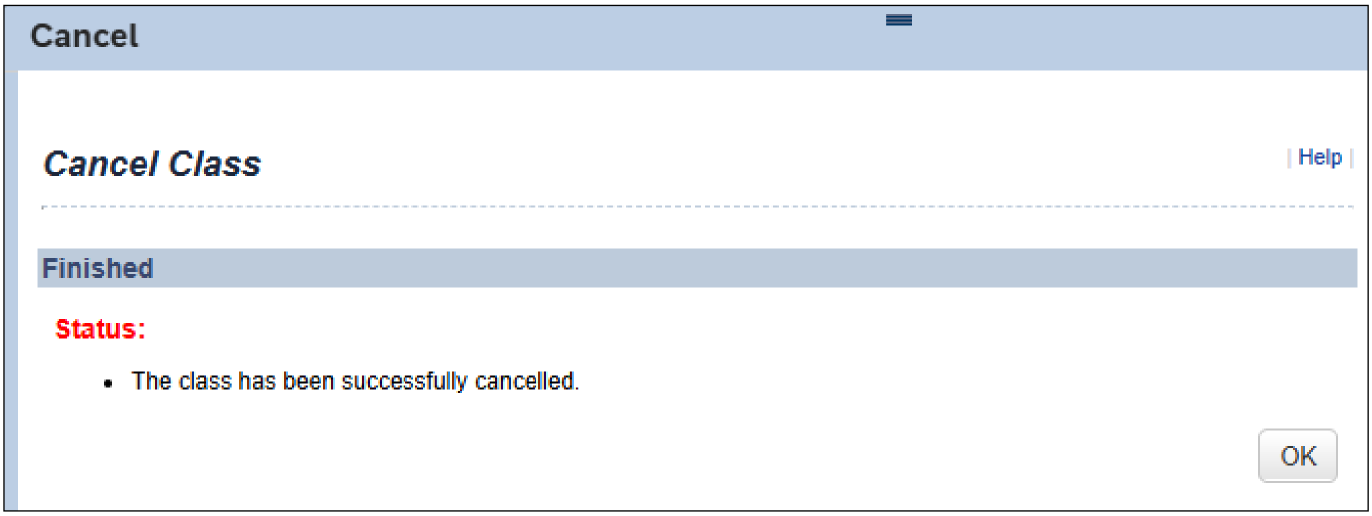
Cancelling a class (continued)

6. The *Cancel* dialogue box reappears, displaying confirmation information.



- Click Finish.

7. The *Cancel* dialogue box reappears, indicating that the class has been successfully cancelled.



- Click OK to return to the class *Details* page.

Closing a class

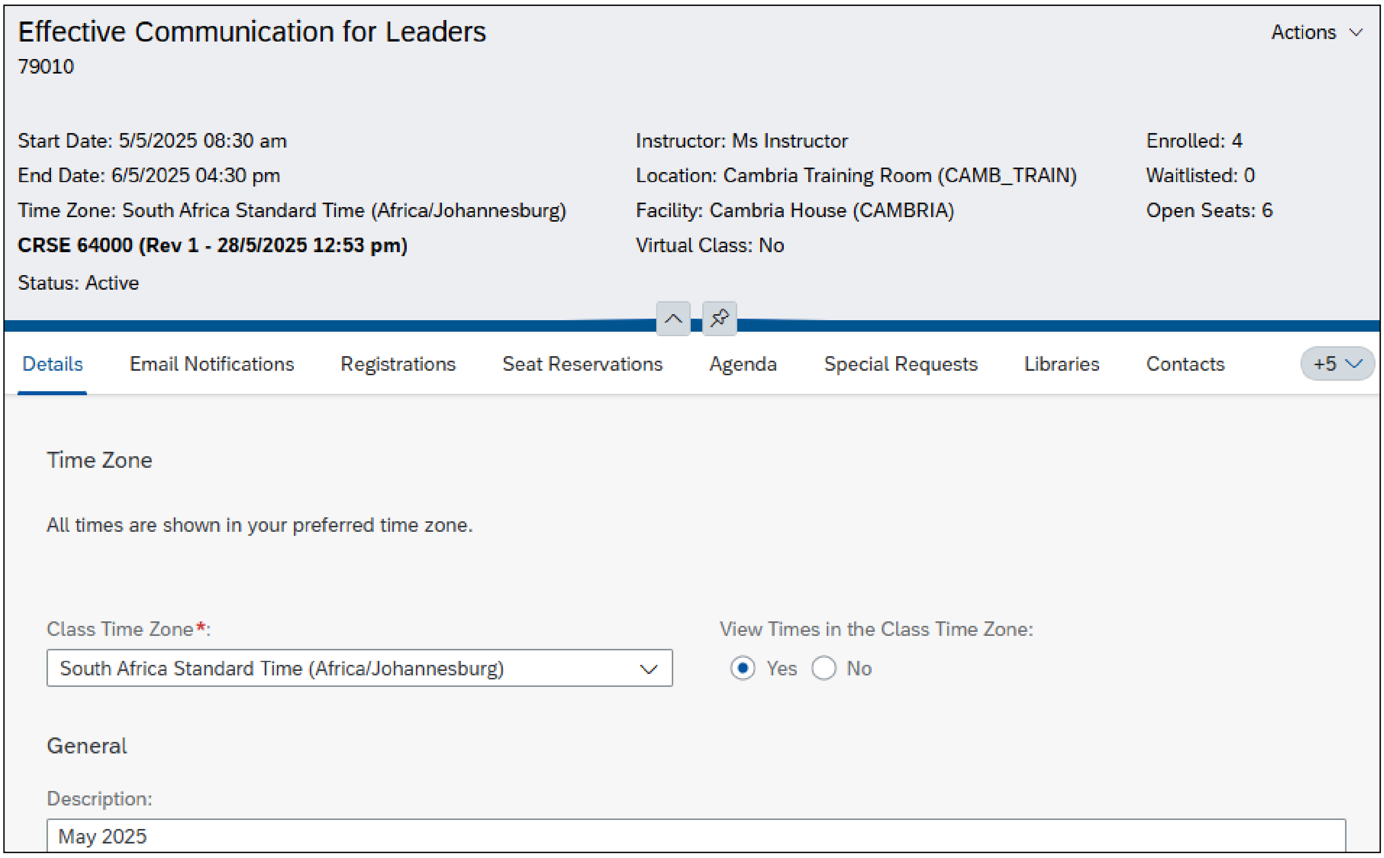
Before you begin

Learning history must be recorded for all learners who attended the class. See: Recording learning after a completed class.

All registrations should be reviewed and anyone who didn't attend should be marked as cancelled. See: Managing class registrations. Once a class is closed, no new registrations can be added.

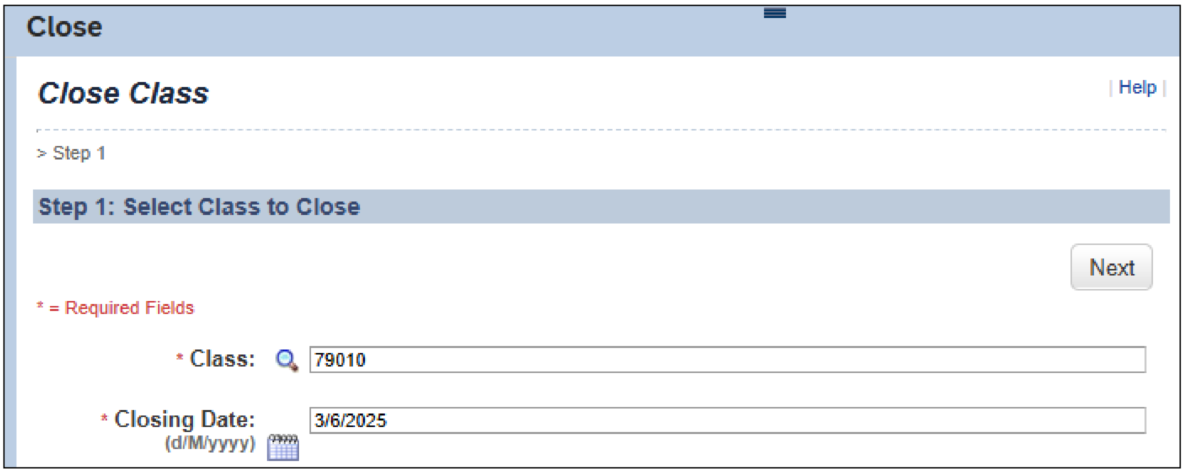
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate class.



- In the *Actions* menu (top right), choose *Close*.

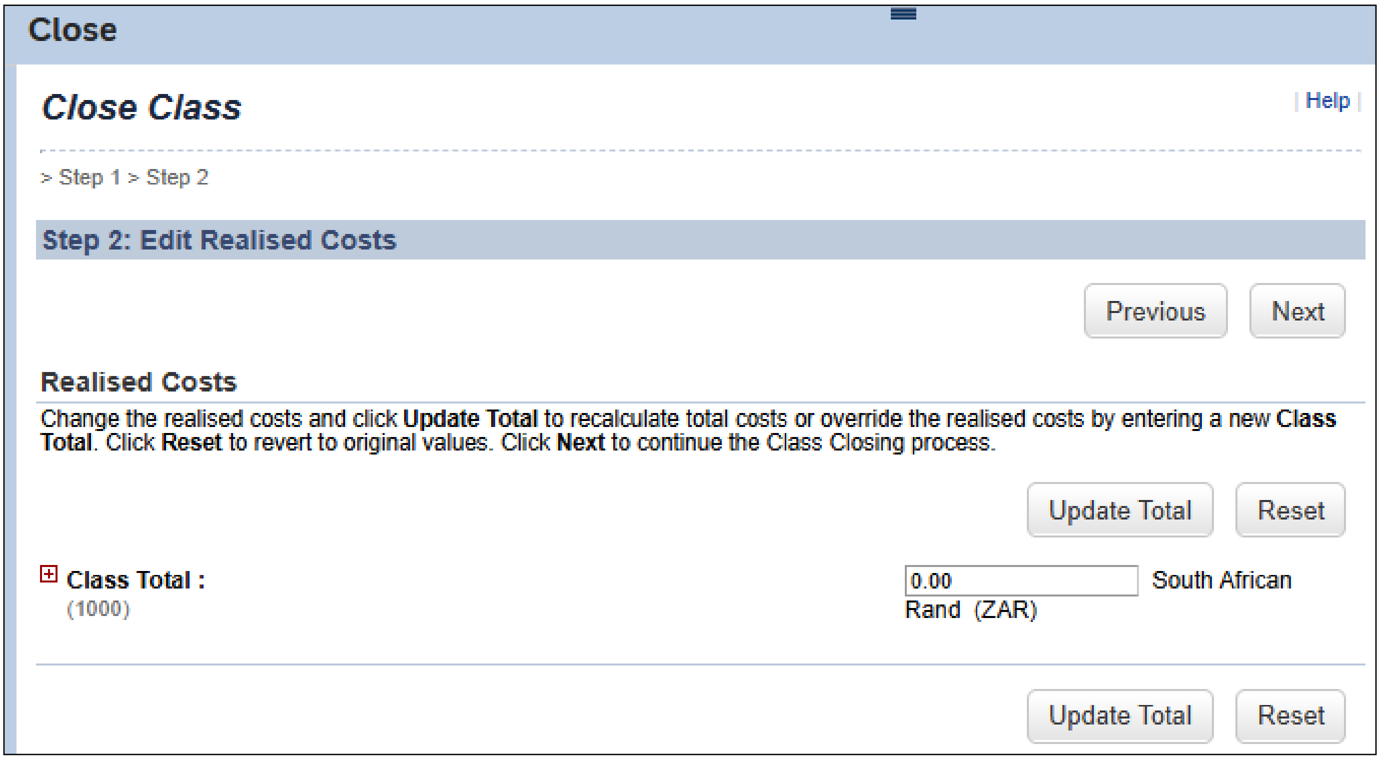
3. The *Close* dialogue box appears.



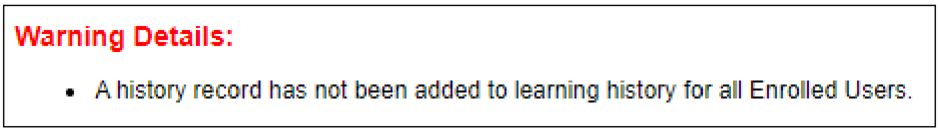
- Click Next.

Closing a class (continued)

4. The *Close* dialogue box reappears, displaying cost information.



- If any learners don't have the class recorded in their learning history, a warning message appears at the top of the *Close* dialogue box. See: [Recording learning after a completed class](#).



- Click

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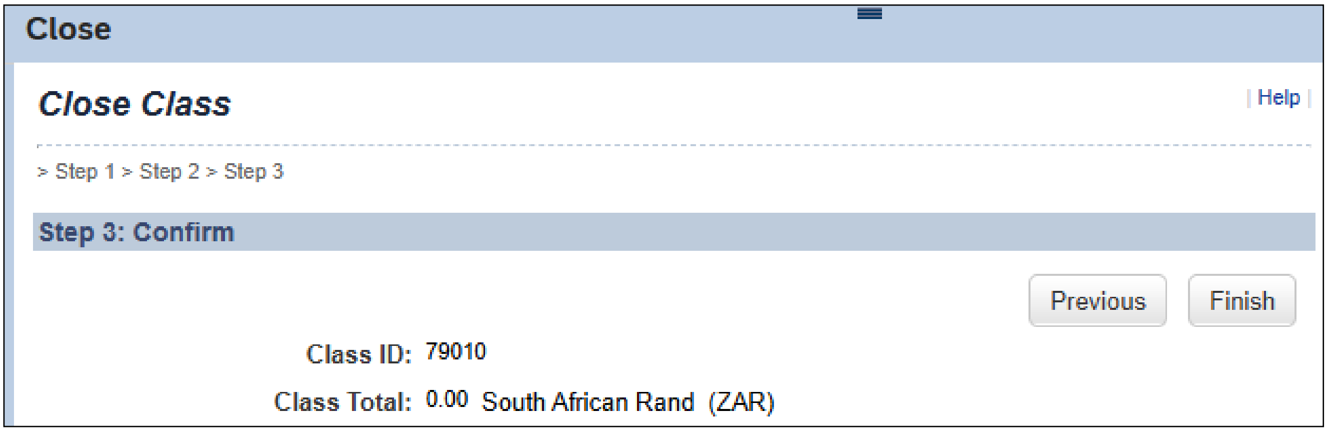
5. The *Close* dialogue box reappears, displaying the class to be closed.

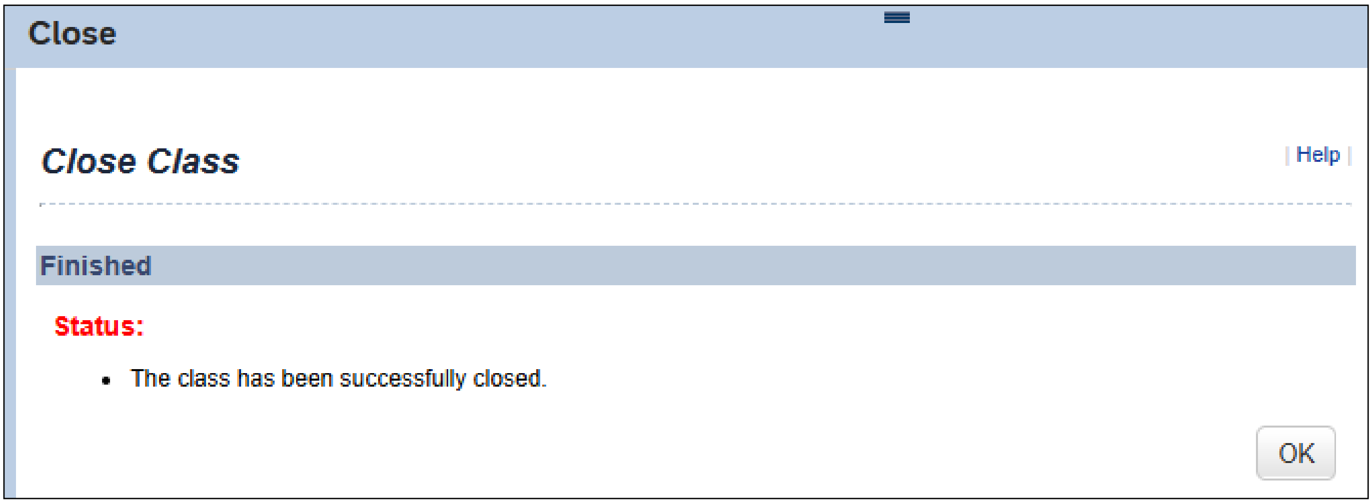


- Click

.

Closing a class (continued)

6. The *Close* dialogue box reappears, confirming the class has been successfully closed.



- Click OK to return to the class *Details* page.

Assigning an item to a learner

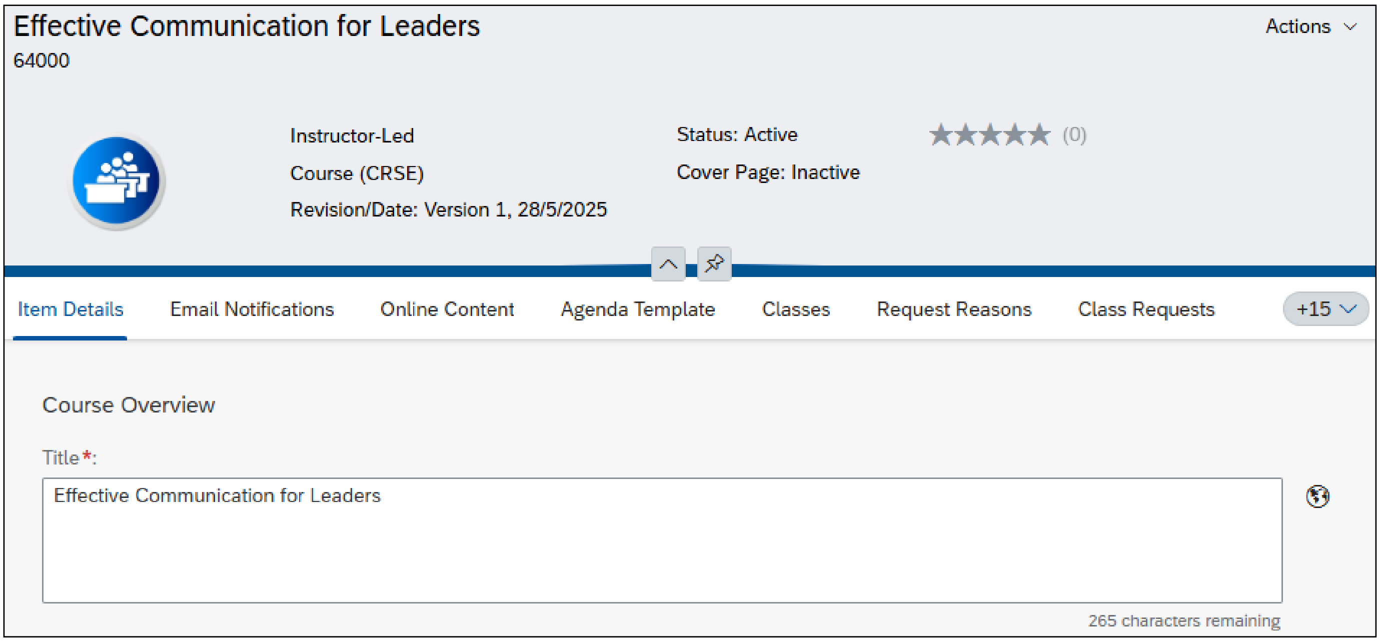
Background

Learners should find items (courses) in the course library and assign to themselves, with the selected item appearing on their *Learning* page. If the learner is unable to assign an item to themselves, a Learning Administrator can directly assign an item to one or more learners.

If a group of learners no longer requires the assignment, the Learning Administrator must access each learner individually to remove the assignment. See: Removing an assigned item from a learner.

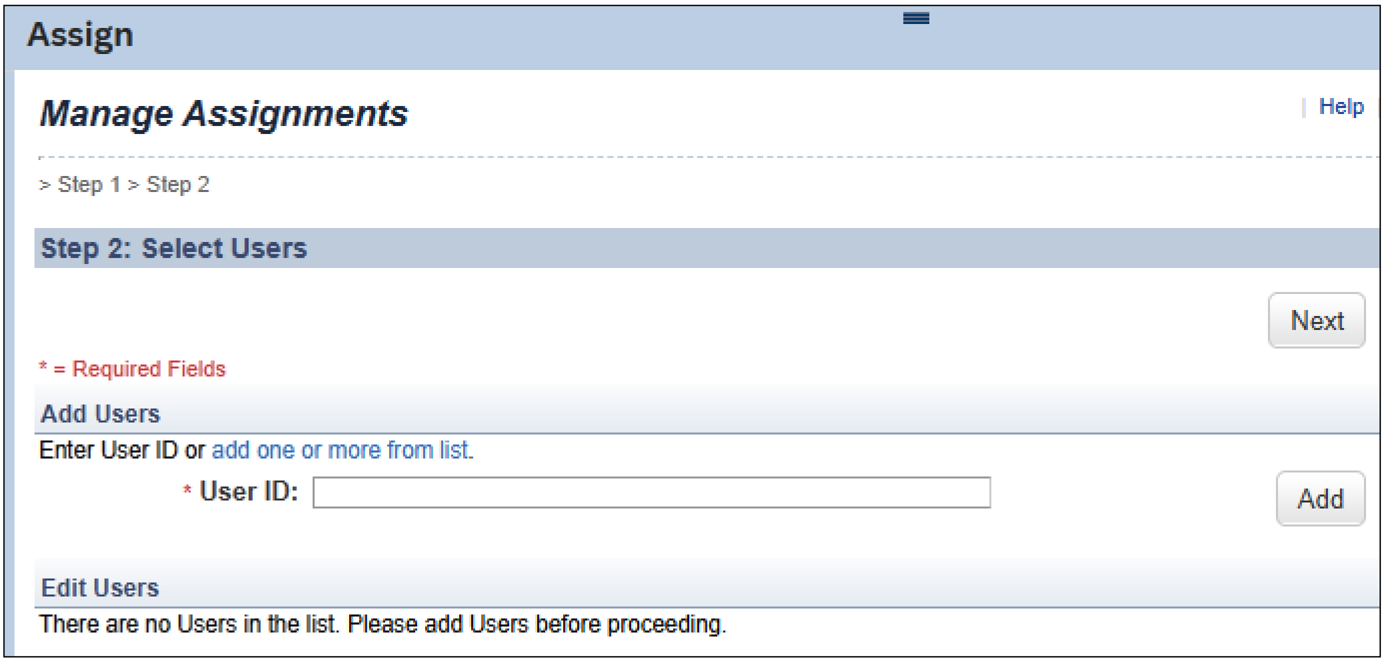
Procedure

1. Log in to SuccessFactors and access the *Learning Administration* page.
2. Search for the appropriate learning item.



- In the *Actions* menu (top right), choose *Assign*.

3. The *Assign* dialogue box appears.

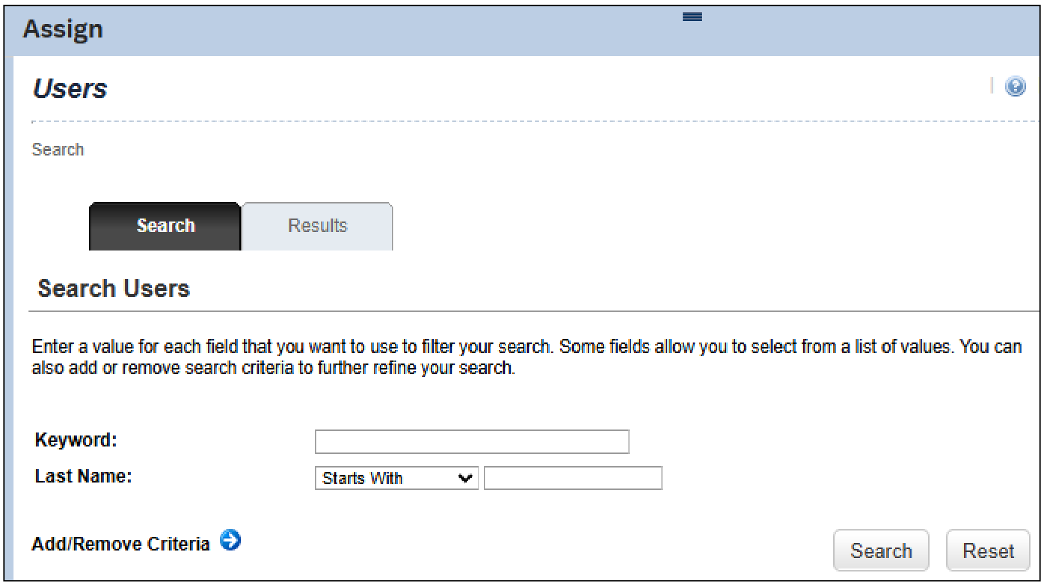


- In the *Add Users* section, click add one or more from list.

Assigning an item to a learner (continued)

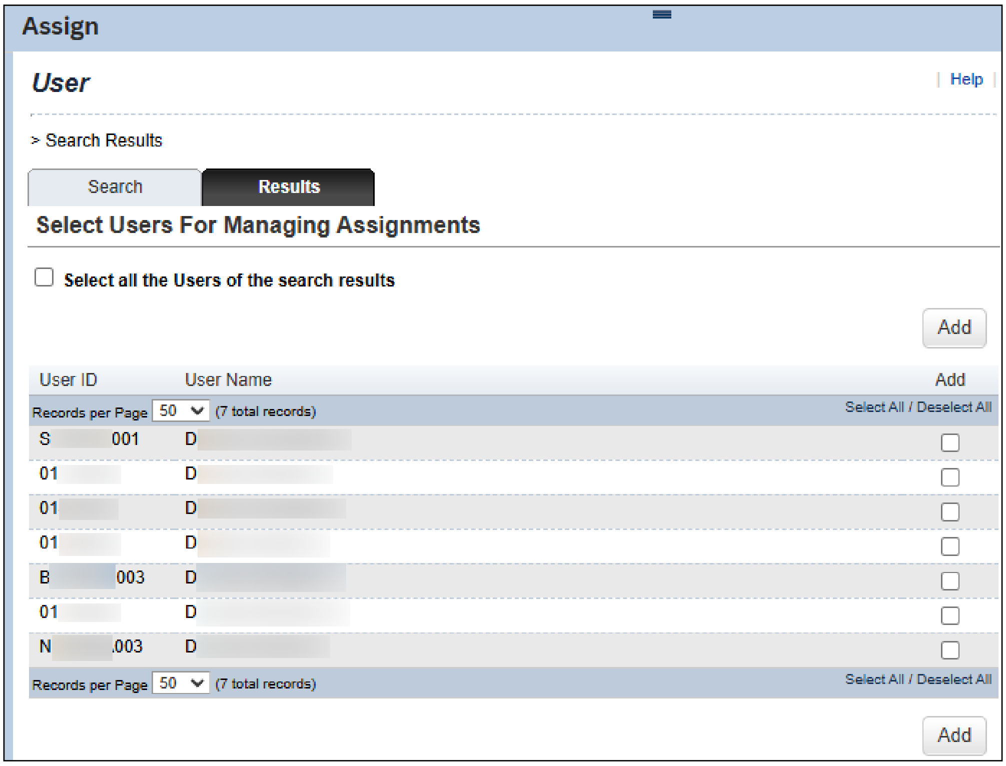
4. The *Assign* dialogue box refreshes, displaying the *Search Users* page.

   - Click Add/Remove Criteria to add additional search criteria, e.g. *Last Name*, *User ID* for the staff number. **Note**: The *Keyword* field can be used to search for users but produces a less organised list when searching for a common last name.



   - Complete the relevant search fields e.g. *Keyword*, *Last Name*.
   - Click Search.

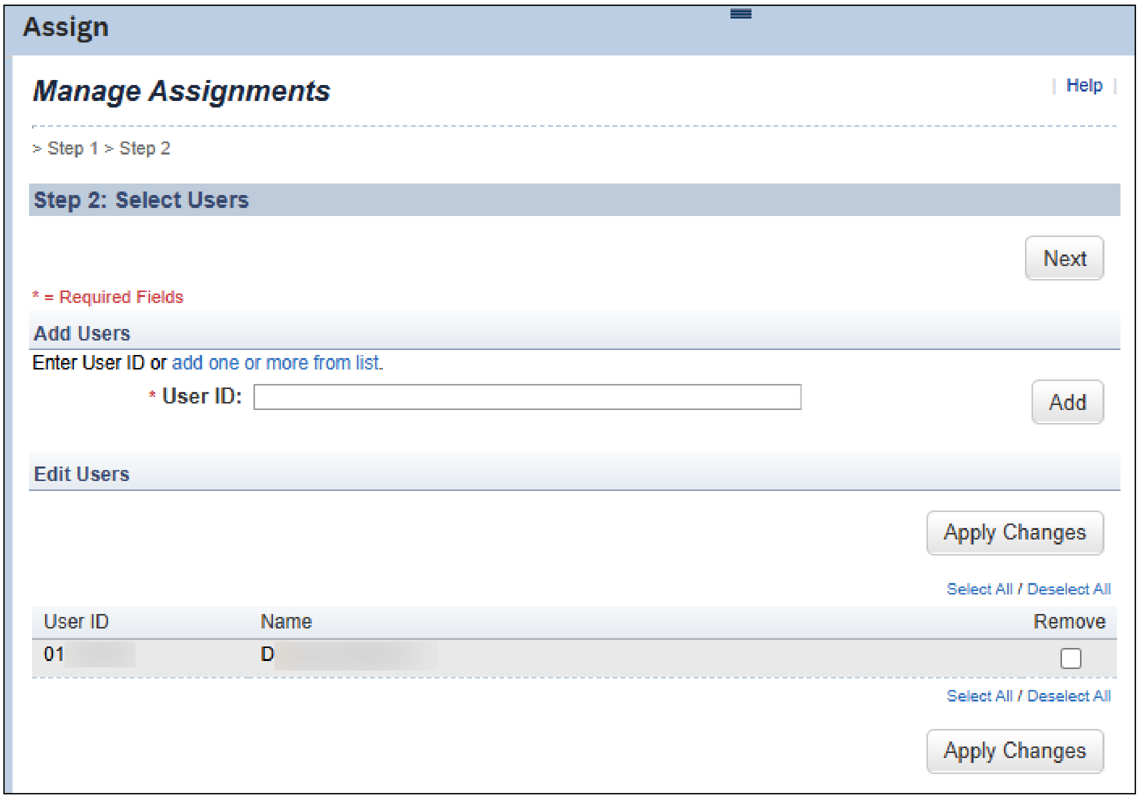
5. The *Assign* dialogue box refreshes, displaying the search results.



   - To view more search results, either change the number of *Records per Page* using the dropdown arrow or click Next» to view additional results.
   - Select the check box in the *Add* column to assign the item to each learner.
   - Click Add.

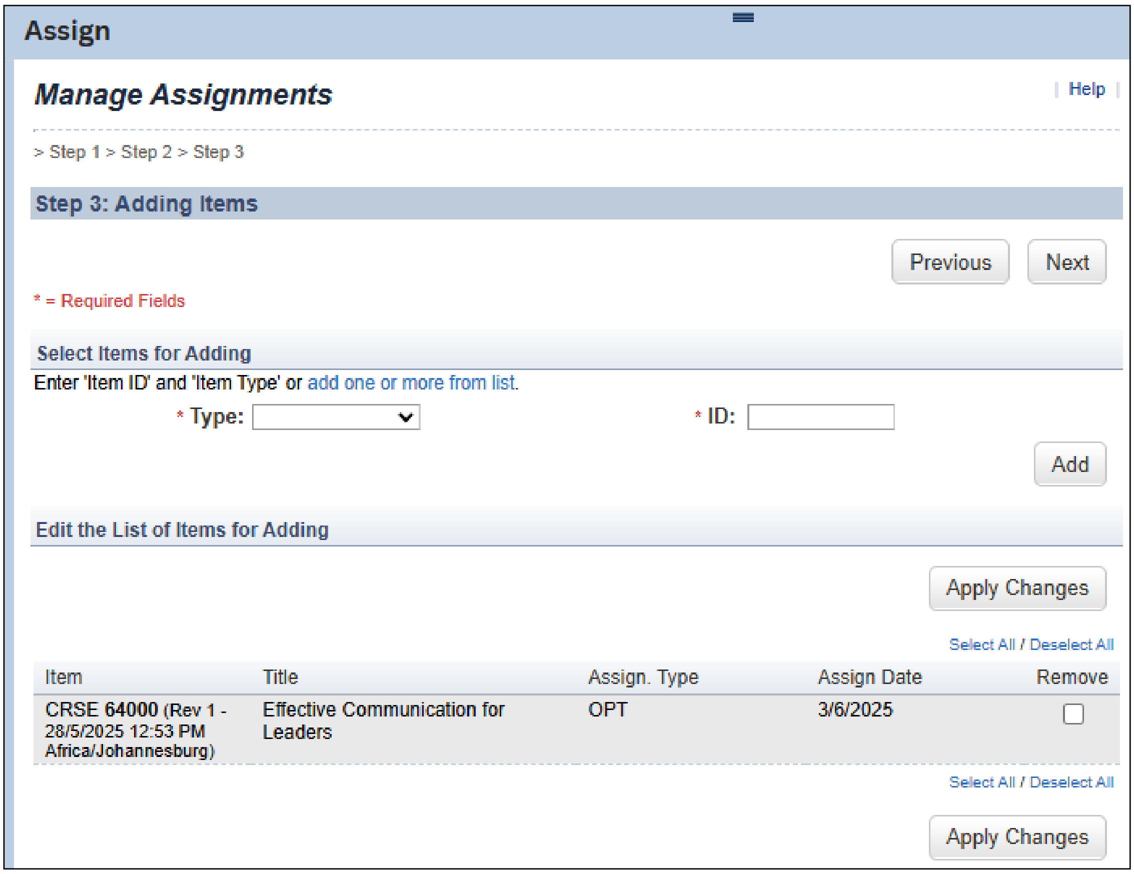
Assigning an item to a learner (continued)

6. The *Assign* dialogue box refreshes, displaying the selected users/learner(s).



- To add another learner, repeat from step 3.
- When all learners have been added, click Next.

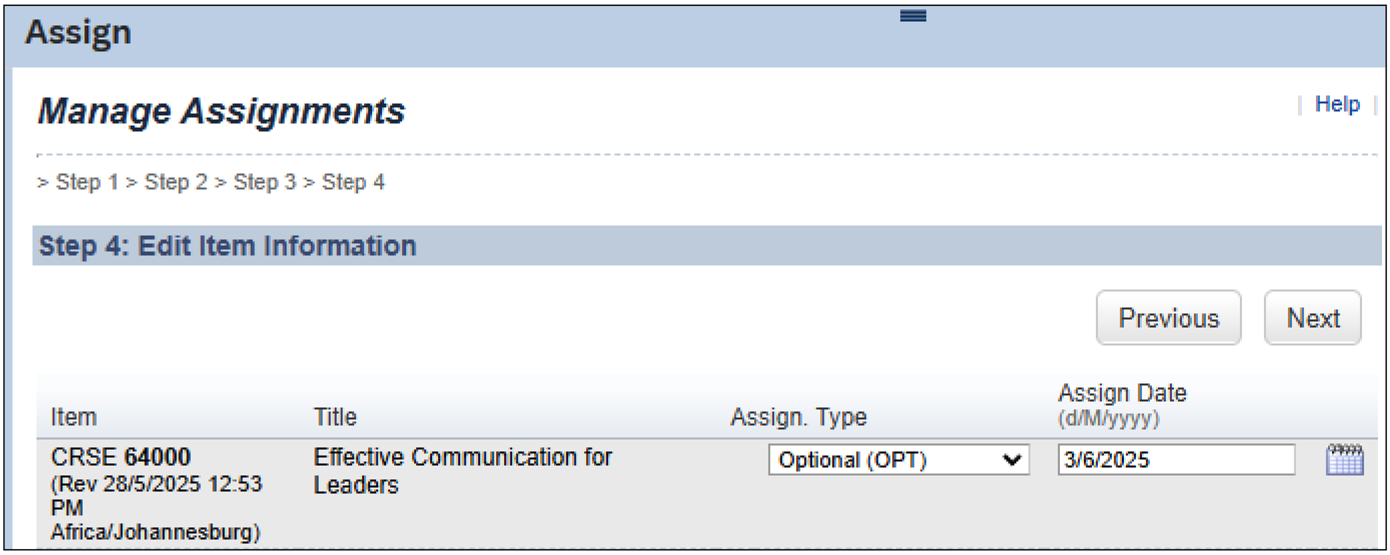
7. The *Assign* dialogue box refreshes, displaying the item details.



- Click Next.

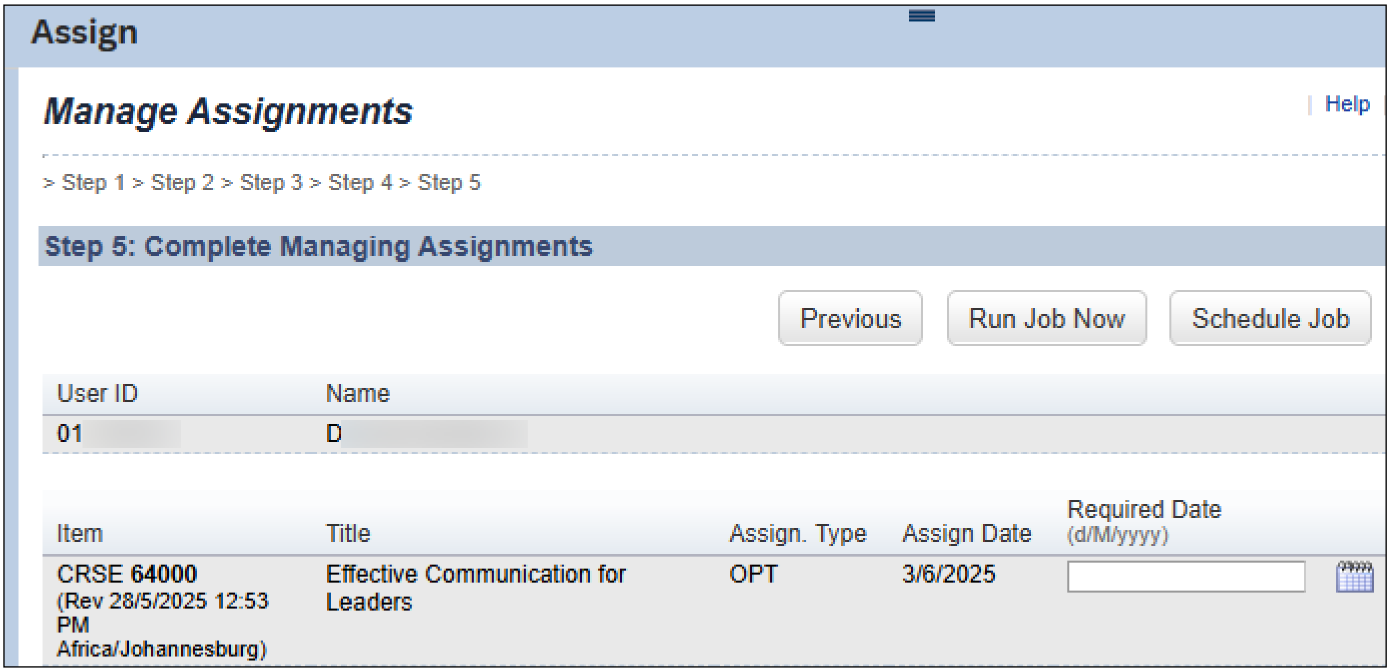
Assigning an item to a learner (continued)

8. The *Assign* dialogue box refreshes, displaying the selected item with assignment type choice.



- Select the appropriate *Assign. Type* e.g. Optional (OPT). Consult the Learning Administrator – Item Fields Guide for assistance with using this field.
- Click Next.

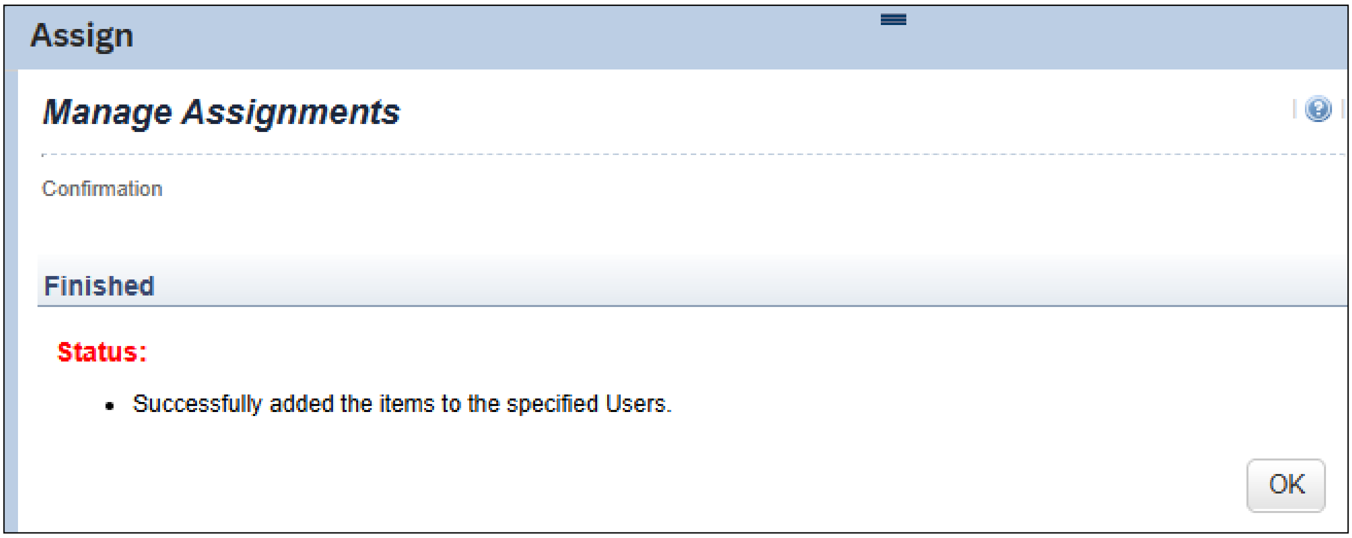
9. The *Assign* dialogue box refreshes, displaying the selected learner(s), the selected item and the selected assignment type.



- If applicable, enter the *Required Date*.
- Click Run Job Now.

Assigning an item to a learner (continued)

10. The *Assign* dialogue box refreshes, confirming the item was added to the selected learners.



- Click .
- The selected item will appear in the learner's *Learning* page under *Required Learning* or *Important Learning* depending on the chosen assignment type (e.g. optional, required).

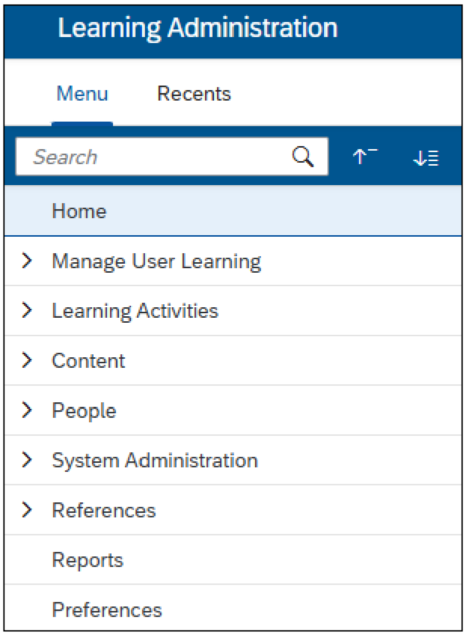
Removing an assigned item from a learner

Background

This procedure is used to remove an assigned item previously assigned to the learner by a Learning Administrator.

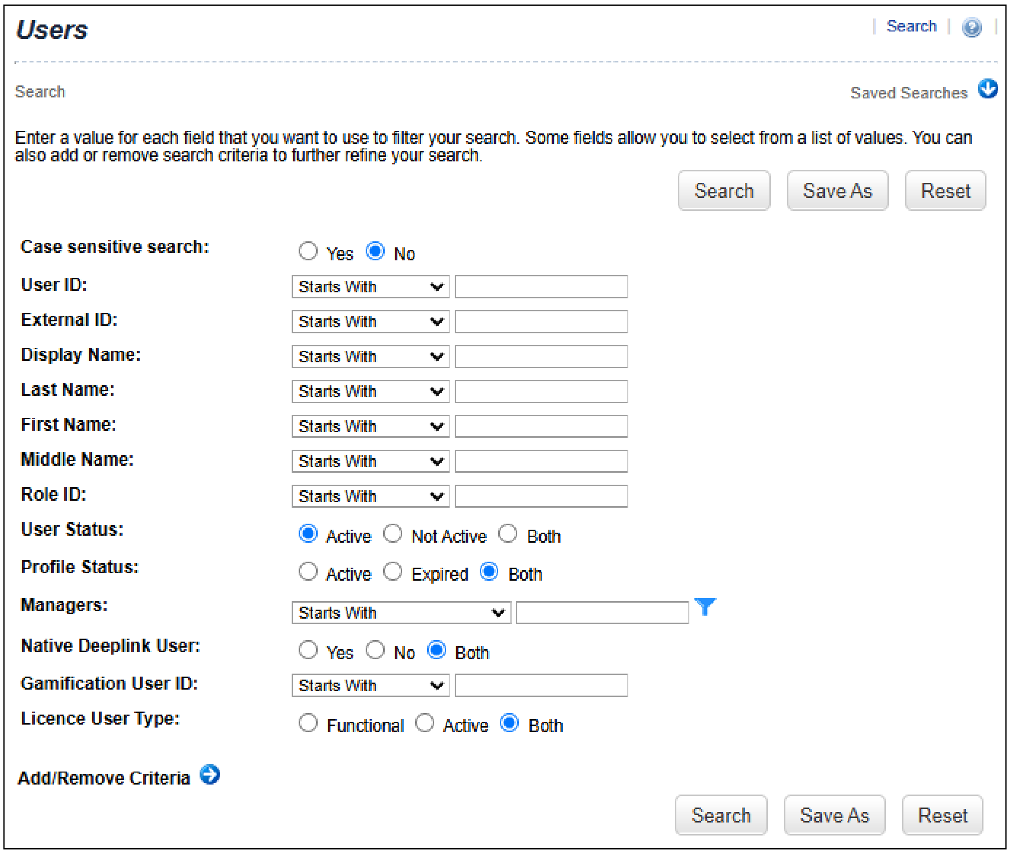
Procedure

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



- In the *Menu*, choose *People > Users.*

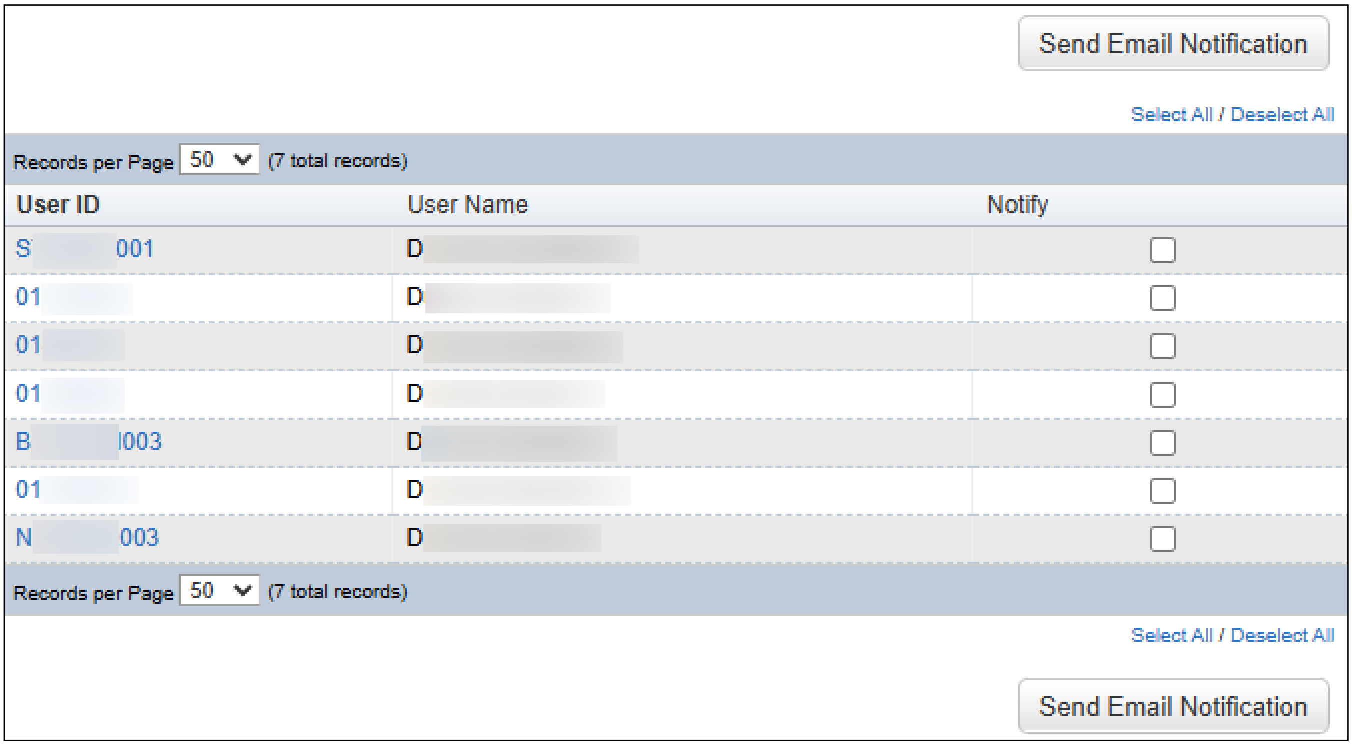
2. The *Users* page appears.



- Enter the learner's *Last Name* or *User ID* (staff number).
- Click Search.

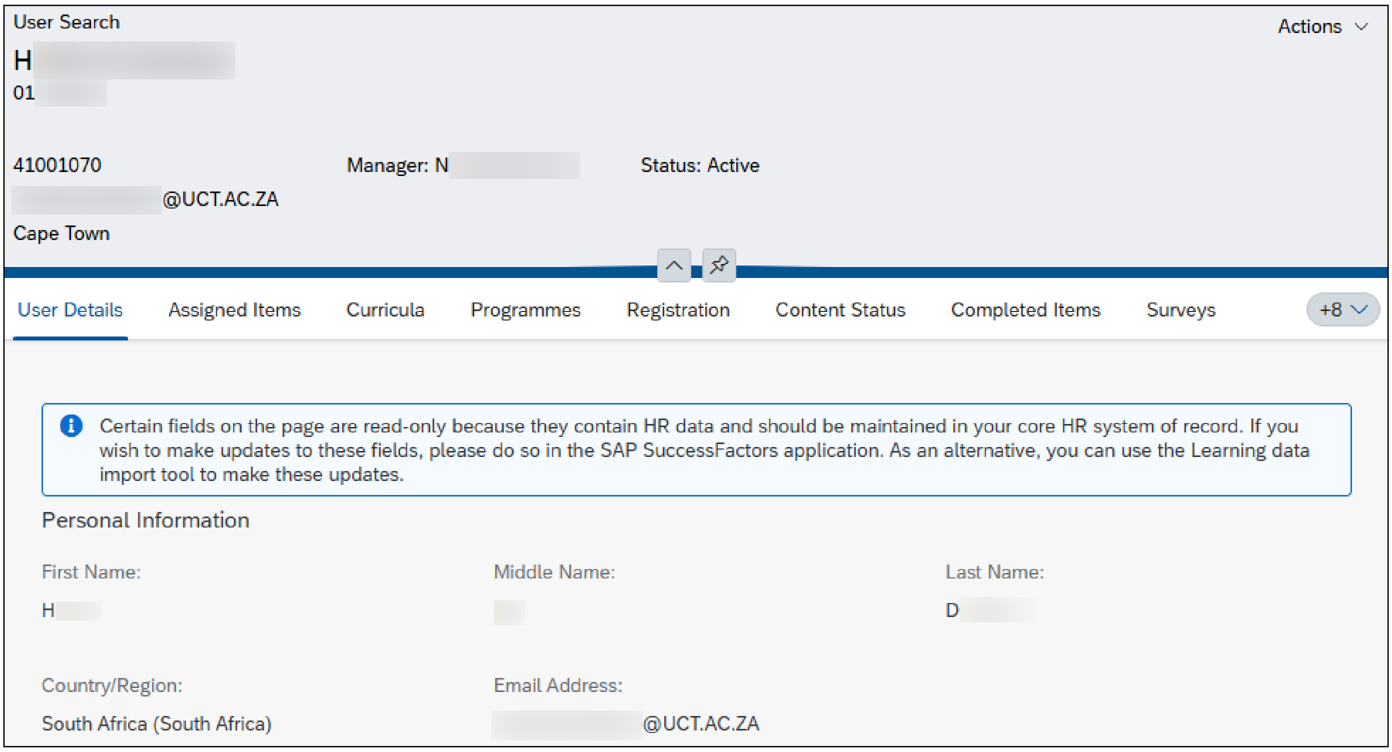
Removing an assigned item from a learner (continued)

3. The search results appear at the bottom of the *Users* page.



- In the *User ID* column, select the learner by clicking the appropriate staff number.

4. The *User Details* page appears.



- In the menu, click *Assigned Items*.

Removing an assigned item from a learner (continued)

5. The *Assigned Items* page appears, displaying items that the learner has not completed.

Assigned Items (3 of 4)

Filtered by: View Filter (Other Needs, Requirements) Total number for filtered result: 3

ID	Item Title	Assigned By	Assigned Date	Required Date	Days Remaining	Assignment Type	Curriculum	Origin	Compl Date	Failure Date	Actions
7006	Development Dialogue Training	[illegible]	19/5/2025	31/12/2025	211	Required		Manager Assigned			•••
64000	Effective Communication for Leaders	[illegible]	3/6/2025			Optional		Directly Assigned			•••
56004	Memory Skills	[illegible]	22/5/2025					Self-Assigned			•••

- Items assigned by a Learning Administrator will have *Directly Assigned* in the *Origin* column.
- To remove a learning assignment, click ••• *Additional Options* and choose *Remove*.

6. The *Assigned Items* page reappears, a message indicates 1 row was removed.

Assigned Items (2 of 3)

Filtered by: View Filter (Other Needs, Requirements) Total number for filtered result: 2

ID	Item Title	Assigned By	Assigned Date	Required Date	Days Remaining	Assignment Type	Curriculum	Origin	Compl Date	Failure Date	Actions
7006	Development Dialogue Training	[illegible]	19/5/2025	31/12/2025	211	Required		Manager Assigned			•••
56004	Memory Skills	[illegible]	22/5/2025					Self-Assigned			•••

1 row was removed.

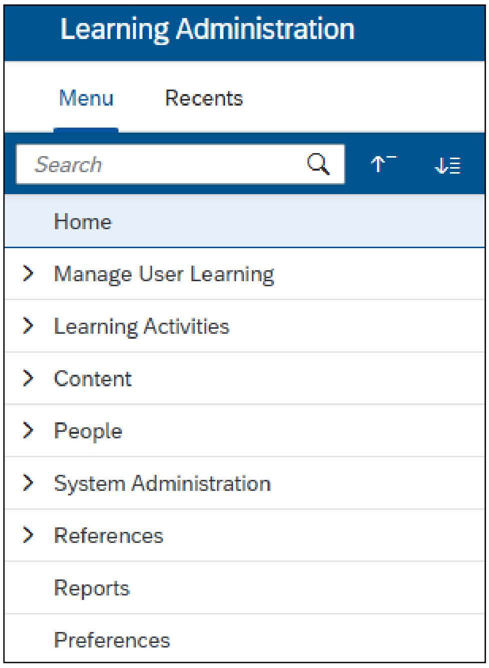
Running reports

Background

This procedure contains general guidelines for running reports. For advice on the best reports to meet your needs, please contact the Staff Learning Centre.

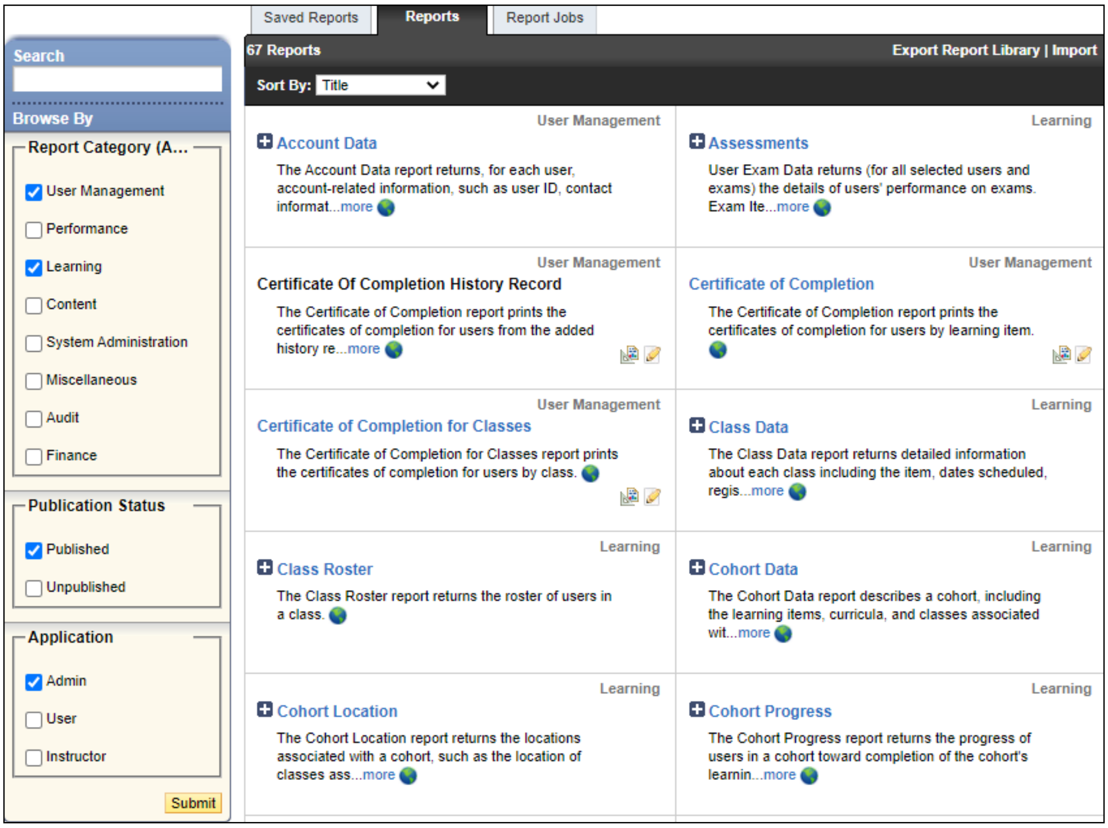
Procedure

1. [Log in to SuccessFactors and access the *Learning Administration* page](#).



- In the *Menu*, choose *Reports.*

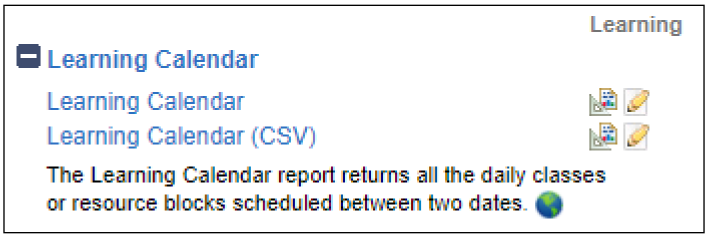
2. The *Reports* page appears.



- If applicable, limit the number of reports displayed by selecting *User Management* and *Learning* in the *Report Category* section on the left. Ensure the *Publication Status* is set to *Published* and the *Application* is set to *Admin*.

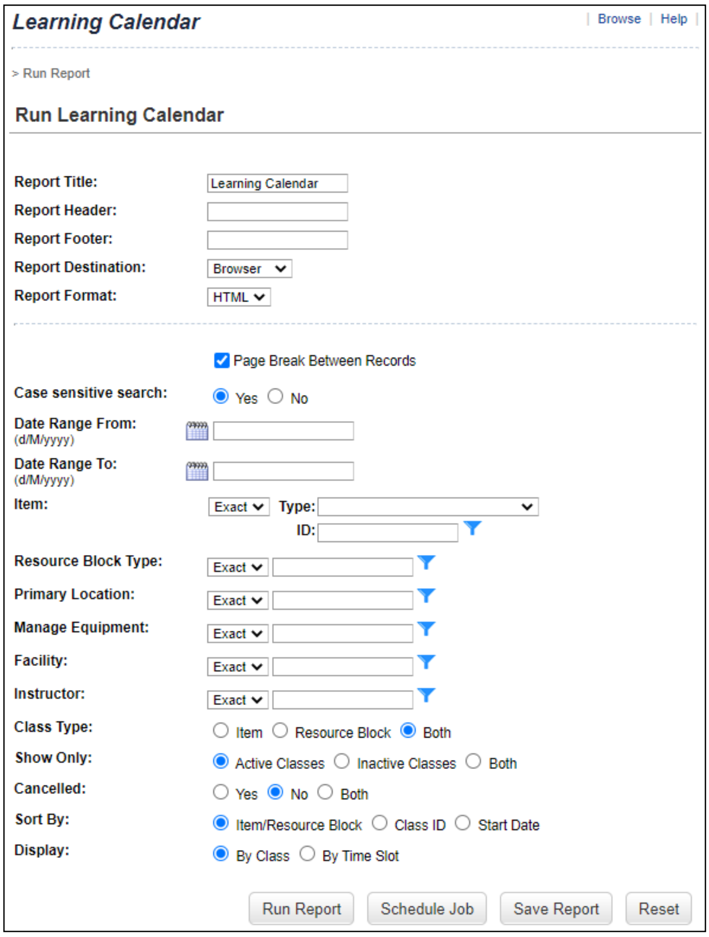
Running reports (continued)

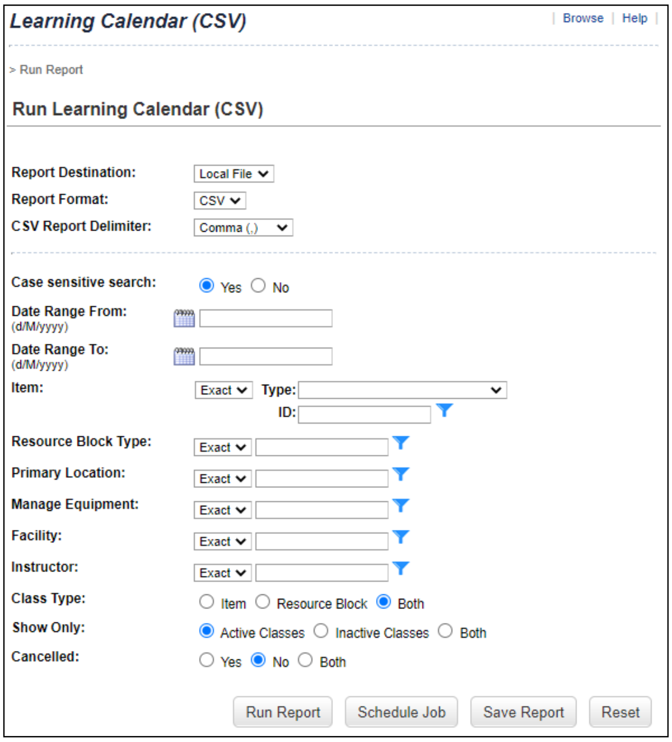
- Locate the required report in the list.
- If applicable, click ⊞ to view the list of reports.



- Select the applicable report by clicking the report name. Most reports have two types, the first (e.g. *Learning Calendar*) displays as HTML in the web browser or produces an Adobe PDF file download. The second type of report with *(CSV)* produces a .CSV (Comma Separated Values) file download that can be opened in Microsoft Excel.

3. The *Run* page for the selected report appears.

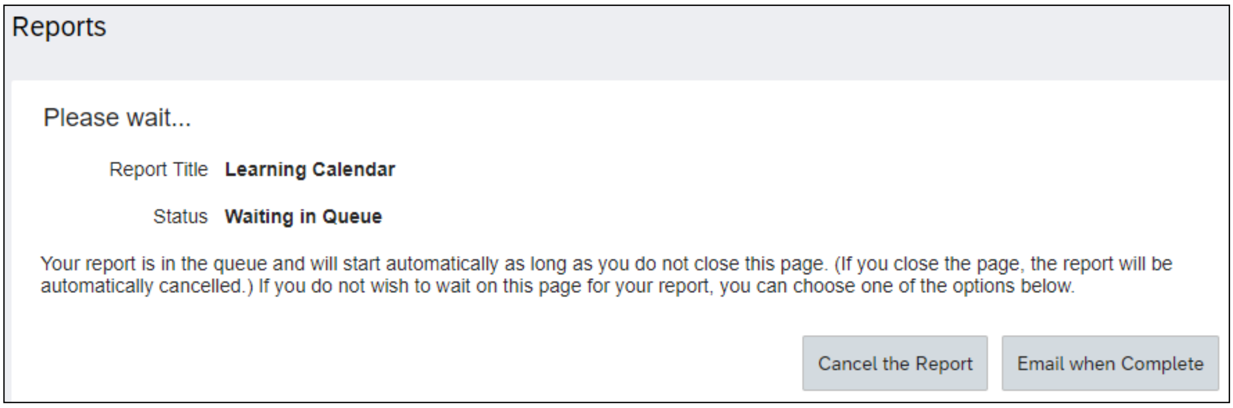




- If applicable, change the *Report Format* e.g. *PDF*.
- Enter or select appropriate criteria depending on the selected report e.g. *Date Range From*, *Date Range To*, *Primary Location*, *Instructor*, *Sort By*.
- Click .

Running reports (continued)

4. A new browser tab is opened, the report may take a little while to run.



- When the report has run, it will either appear directly in the browser or as a file download.
- When finished viewing or downloading the report, close the browser tab to return to *Learning Administration*.
- In *Learning Administration*, click Browse to return to the full list of reports.