



UNIVERSITY OF CAPE TOWN  
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# SuccessFactors Learning guide for Learning Administrators

Issued by UCT Human Resources  
June 2025

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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.

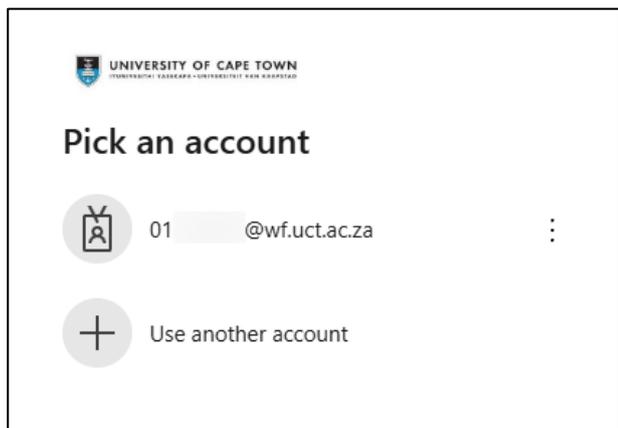
## Support

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

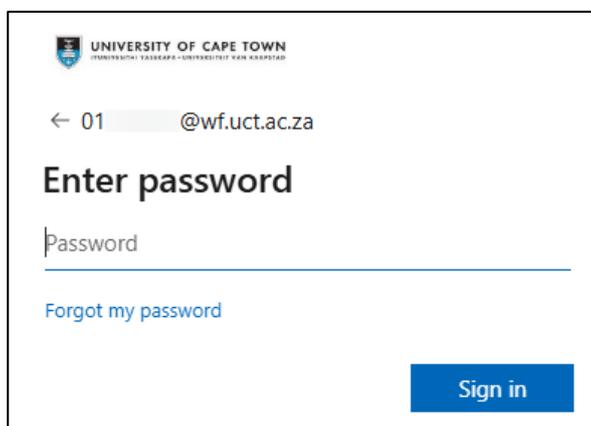
## Procedure

1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
2. Log in to SuccessFactors via [www.successfactors.uct.ac.za](http://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)



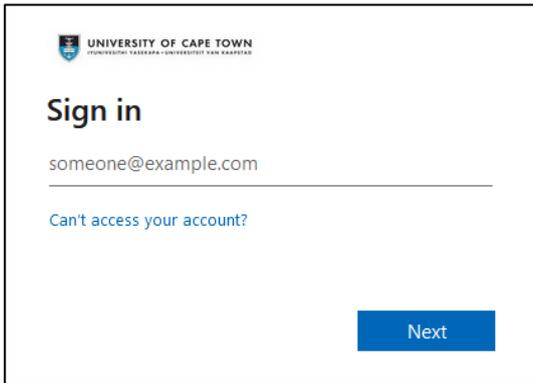
- Select the appropriate account.



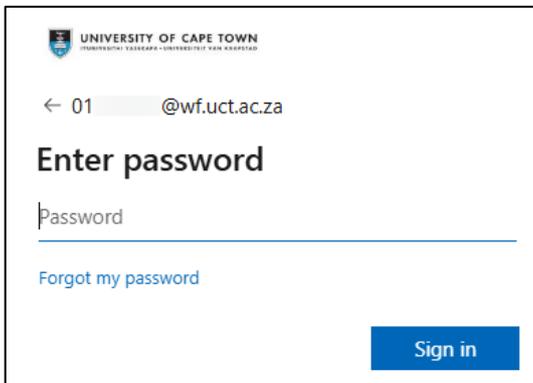
- Enter your *Password* and click *Sign in*.
- You will be prompted to verify your login either via Microsoft Authenticator or a code sent to your phone as an SMS. SuccessFactors will open (see [step 4](#)).

# Logging in to SuccessFactors via a browser (continued)

## New users

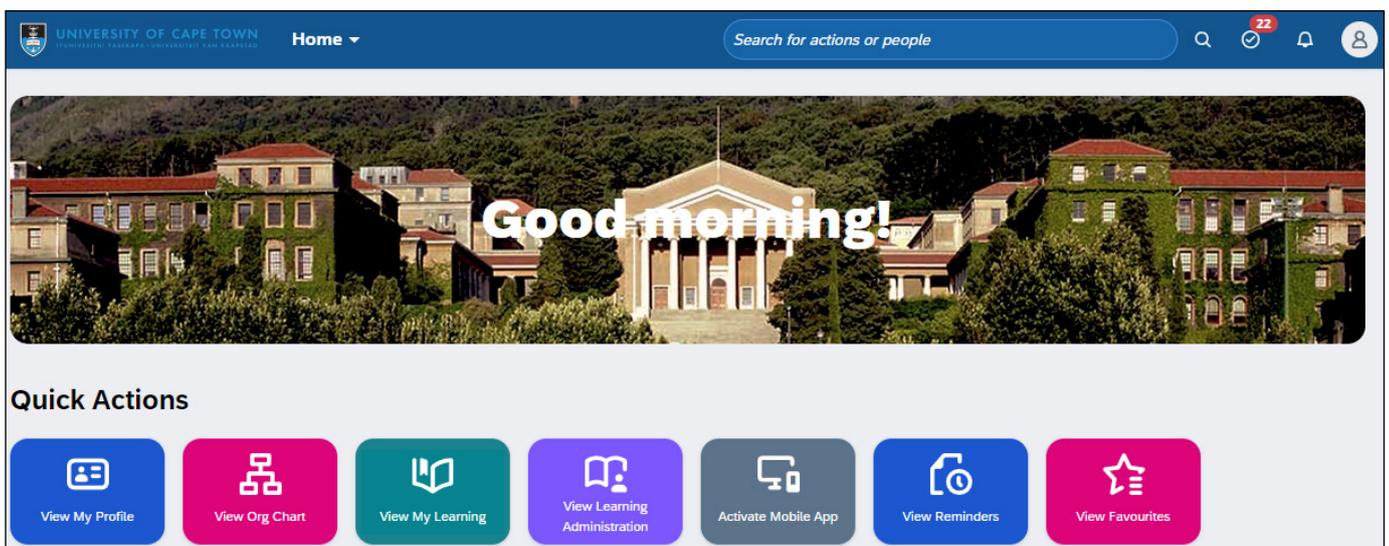


- In the field below *Sign in*, enter your UCT staff number followed by @wf.uct.ac.za. E.g. 01234567@wf.uct.ac.za. **Note:** UCT staff number only, third party "T" accounts will not work.
- Click *Next*.



- 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.

UNIVERSITY OF CAPE TOWN  
ADMIN CENTRE

Search for actions or people

Learning Administration

Menu Recents

Search

Home

- > Manage User Learning
- > Learning Activities
- > Content
- > People
- > System Administration
- > References

Reports

Preferences



Hi [redacted], new to SuccessFactors Administration? You can use the question icon in the header toolbar to get Learning Administration help at any time.

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

# Creating a new item

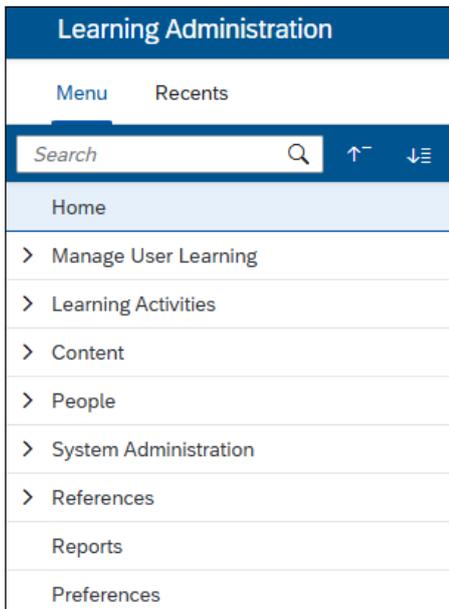
## Background

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.

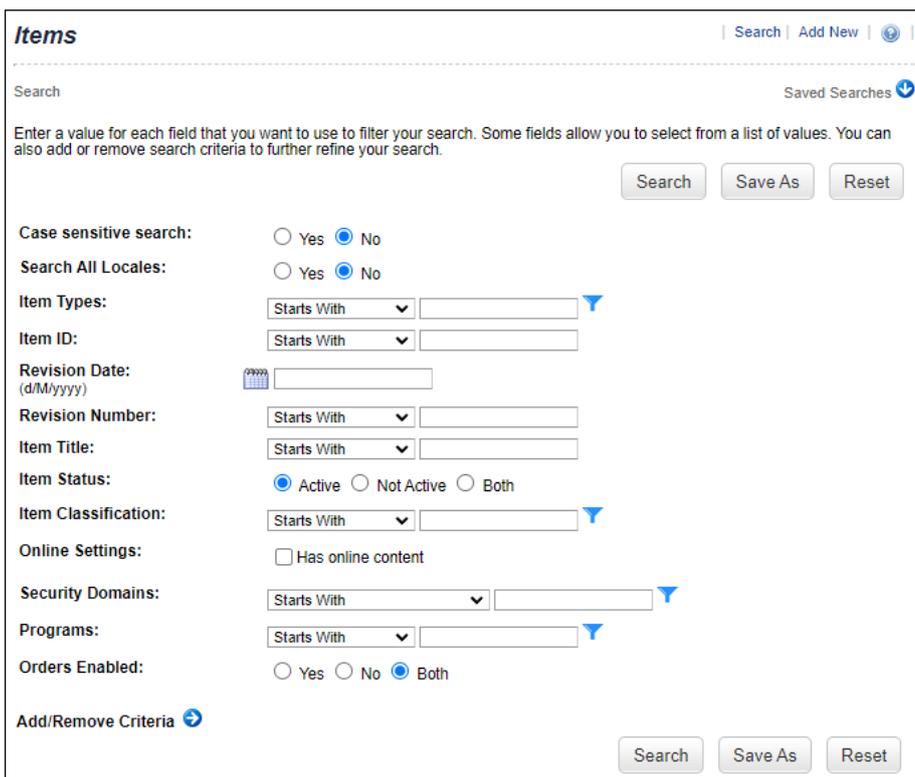
## Procedure

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)

**Course Overview**

<p><b>Title *:</b></p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">                     No title in current locale.                 </div> <p style="text-align: right; font-size: small;">300 characters remaining</p>	<p><b>Audience:</b></p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">                     No audience in current locale.                 </div> <p style="text-align: right; font-size: small;">300 characters remaining</p>	
<p><b>Duration:</b></p> <div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;">1000</div> hours	<p><b>Delivery Method *:</b></p> <div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;"> <span style="float: right;">v</span> </div>	<p><b>Source *:</b></p> <div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;"> <span style="float: right;">v</span> </div> <span style="font-size: 2em; vertical-align: middle;">+</span>
<p><b>Credit Hours:</b></p> <div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;">1000</div> hours	<p><b>Contact Hours:</b></p> <div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;">1000</div> hours	<p><b>CPD Points:</b></p> <div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;">1000</div> hours
<p><b>Description:</b></p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">                     No description in current locale.                 </div> <p style="text-align: right; font-size: small;">4000 characters remaining</p>		<p><b>Image URL:</b></p> <div style="border: 1px solid #ccc; padding: 2px 5px;">                     https://example.com/dir/filename                 </div>
		<p><b>Contact's Email:</b></p> <div style="border: 1px solid #ccc; padding: 2px 5px;">                     username@example.com                 </div>

- 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)

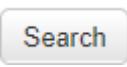
Access Settings

Security Domain\*:  

Status:  Active

Available in Library:  Yes  No

Editable in Master Inventory

- *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  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)

Registration Settings

Minimum Enrolments:

Maximum Enrolments:

Prevent Multiple Class Registration Interval:  Days

User can Self-Register:

Manager can Register Others:

User can Request a Class:

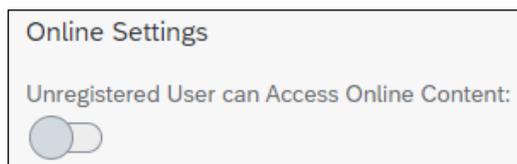
Auto Enrol from Waitlist:  Yes  No

User can Waitlist:

- 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:



Online Settings

Unregistered User can Access Online Content:

- 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:



Approval Process

Approval Required:  Yes  No

Approval Process:

- 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:



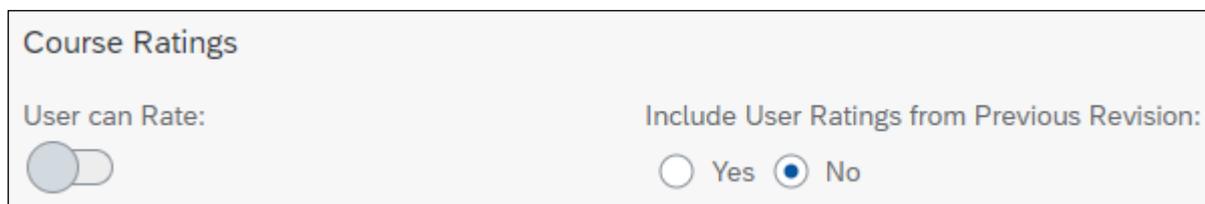
Withdraw Approval Process

Approval Required to Withdraw:  Yes  No

Withdraw Approval Process:

- 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:



Course Ratings

User can Rate:

Include User Ratings from Previous Revision:  Yes  No

- 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:

Assignments		
Initial Basis: <input type="text"/>	Initial Number: <input type="text"/>	Initial Period: <input type="text"/>
Initial Required Date Basis: <input type="text"/>	Retraining Basis: <input type="text"/>	Retraining Number: <input type="text"/>
Retraining Period: <input type="text"/>	Assignment Type*: <input type="text"/>	Users can remove non-required assignments: <input type="checkbox"/>

- 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:

Completion		
Auto Record Competency Rating on Item Completion: <input type="checkbox"/>	User can Add to Learning History: <input type="checkbox"/>	Managers can Add to Learning History: <input type="checkbox"/>
Certificate Template: <input type="text"/>		

- 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:

Version Details		
Creation Date: <input type="text"/>	Revision Date and Time*: <input type="text"/>	Revision Number: <input type="text"/>
18/5/2022	18/5/2022 08:18 am	

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

## Creating a new item (continued)

In the *Custom Fields* section:

Custom Fields

Compliance*: <input type="text"/>	SETA*: <input type="text"/>	Include in ATR/WSP*: <input type="text"/>
Tuition Cost Per Person R [0000.00]*: <input type="text"/>	Is it linked to Pivotal?*: <input type="text"/>	Impact Level*: <input type="text"/>
NQF Level*: <input type="text"/>	SETA NQF Level Group*: <input type="text"/>	SAQA Credits*: <input type="text"/>
Is it linked to ABET?*: <input type="text"/>	Top-Up Skill*: <input type="text"/>	UCT area that created the Item*: <input type="text"/>
SETA Accredited*: <input type="text"/>	SETA Discretionary Grant*: <input type="text"/>	BBBEE Outcome*: <input type="text"/>
Additional Costs R [0000.00]*: <input type="text"/>		

- 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 . A message indicates that the changes were saved.

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

Effective Communication for Leaders Actions ▾

64000



Instructor-Led

Course (CRSE)

Revision/Date: Version 1, 28/5/2025

Status: Active

Cover Page: Inactive

★★★★★ (0)

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Item Details
Email Notifications
Online Content
Agenda Template
Classes
Request Reasons
Class Requests
Libraries
+14 ▾

Agenda Template + ✎ ✕

	Description	Duration	Delay Start	Location Type	
<input type="checkbox"/>	Day 1				⋮
<input type="checkbox"/>		8.00 hours			⋮

- 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.

Effective Communication for Leaders  
64000

Instructor-Led  
Course (CRSE)  
Revision/Date: Version 1, 28/5/2025

Status: Active  
Cover Page: Inactive

★★★★★ (0)

Item Details | Email Notifications | Online Content | Agenda Template | Classes | Request Reasons | Class Requests | Libraries +14

Course Overview

Title\*: Effective Communication for Leaders

Audience: No audience in current locale.

- 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 at the far right displays a dropdown list of menu items not currently visible e.g. *Surveys, Prerequisites*.

Item Details | Email Notifications | Online Content | Agenda Template | Classes | Request Reasons | Class Requests | Libraries +14

- 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 <b>course library</b>	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: <a href="#">Working with libraries</a>
the learning item should be included in one or more <b>categories</b> 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: <a href="#">Working with categories</a>
there is another learning item that is a <b>prerequisite</b> for the current item	Link all items (courses) that must be completed before a learner can register on the current learning item. See: <a href="#">Working with prerequisites</a>
there are preferred or <b>authorised instructors</b> for the learning item	The instructor(s) must be connected to the item. See: <a href="#">Adding an authorised instructor to an item</a>
there is a need to collect <b>feedback</b> (e.g. <b>course evaluations</b> ) 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: <a href="#">Working with surveys</a>

# 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 **B** *Bold*, *i* *Italic* or U *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.

Description	Duration	Delay Start	Location Type	
Day 1	8.00 hours			...
Day 2	8.00 hours			...

- 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.

**Add Time Slot**

**Day: \***

**Description:**

**Duration: \***  
 hours

**Delay Start:**  
 hours

**Location Type:**

- 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		
<input type="checkbox"/>	Description	Duration
<input type="checkbox"/>	▼ Day 1	
<input type="checkbox"/>	Understanding the leadership behaviours that are critical for success	7.50 hours
<input type="checkbox"/>	▼ Day 3	
<input type="checkbox"/>	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			
<input type="checkbox"/>	Description	Duration	Delay Start
<input type="checkbox"/>	▼ Day 1		
<input type="checkbox"/>	Understanding the leadership behaviours that are critical for success	8.00 hours	
<input type="checkbox"/>	▼ Day 2		
<input type="checkbox"/>	Increasing self-awareness, influence and impact	3.50 hours	
<input type="checkbox"/>	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](#).

Agenda Template				
<input type="checkbox"/>	Description	Duration	Delay Start	Location Type
<input type="checkbox"/>	▼ Day 1			...
<input type="checkbox"/>		8.00 hours		...

- 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.

### Copy Time Slots for the Selected Day

Day selected for copying:  
**1**

Number of Times to Copy: \*

- 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.

Agenda Template				
<input type="checkbox"/>	Description	Duration	Delay Start	Location Type
<input type="checkbox"/>	▼ Day 1			...
<input type="checkbox"/>		8.00 hours		...
<input type="checkbox"/>	▼ Day 2			...
<input type="checkbox"/>		8.00 hours		...
<input type="checkbox"/>	▼ Day 3			...
<input type="checkbox"/>		8.00 hours		...
<input type="checkbox"/>	▼ Day 4			...
<input type="checkbox"/>		8.00 hours		...

## Items: Working with the agenda template (continued)

### Changing a day

- Click  *Edit*.

Agenda Template				
Description	Duration	Delay Start	Location Type	
<input type="checkbox"/> Day 1				...
<input type="text"/>	<input type="text" value="8.00"/> hours	<input type="text" value="1000"/> hours	<input type="text"/>	...
<input type="checkbox"/> Day 3				...
<input type="text" value="Morning session"/>	<input type="text" value="3.50"/> hours	<input type="text" value="1000"/> hours	<input type="text"/>	...
<input type="text" value="Afternoon session"/>	<input type="text" value="3.50"/> hours	<input type="text" value="1.00"/> hours	<input type="text"/>	...

- 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 . A message indicates the changes were saved.

### Deleting a day

Agenda Template				
<input type="checkbox"/>	Description	Duration	Delay Start	Location Type
<input type="checkbox"/>	<input type="checkbox"/> Day 1			...
<input type="checkbox"/>		8.00 hours		...
<input type="checkbox"/>	<input type="checkbox"/> Day 3			...
<input type="checkbox"/>	<input type="checkbox"/> Morning session	3.50 hours		...
<input type="checkbox"/>	<input type="checkbox"/> Afternoon session	3.50 hours	1.00 hours	...
<input type="checkbox"/>	<input type="checkbox"/> Day 5			...
<input type="checkbox"/>		8.00 hours		...

- 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.

**Libraries**

**Add Item To Libraries**

Records per Page: 50 (15 total records) Select All / Deselect All

Library ID	Description	Add Classes	Add
HR	Audience: All HR Staff	<input type="checkbox"/>	<input type="checkbox"/>
ICTS	Audience: All ICTS Staff	<input type="checkbox"/>	<input type="checkbox"/>
Level 2 & 3 Line Managers	Audience: All Line Managers operating at Levels 2 & 3 (Tactical Lower & Tactical Higher Levels)	<input type="checkbox"/>	<input type="checkbox"/>
Level 3 & 4 Line Managers	Audience: All Line Managers operating at Levels 3 & 4 (Strategic & Tactical Higher Levels)	<input type="checkbox"/>	<input type="checkbox"/>
Manager	Audience: All Line Managers	<input type="checkbox"/>	<input type="checkbox"/>
OHSE	OHSE STAFF	<input type="checkbox"/>	<input type="checkbox"/>
PC01 - PC06 staff	Audience: All PC01 - PC06 Staff	<input type="checkbox"/>	<input type="checkbox"/>
PC11 staff	Audience: All PC11 Staff	<input type="checkbox"/>	<input type="checkbox"/>
PUBLIC	Audience: All UCT Staff	<input type="checkbox"/>	<input type="checkbox"/>
RESEARCH	Audience: All Academic Staff AND All Research & Innovation Staff	<input type="checkbox"/>	<input type="checkbox"/>
Senior Lecturers	Audience: All Senior Lecturer Staff	<input type="checkbox"/>	<input type="checkbox"/>
UCT Levels of Work (Level 1)	Audience: All Staff operating at Level 1 (Operational Level - PC01-07)	<input type="checkbox"/>	<input type="checkbox"/>

- 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 .

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

**Libraries (1)** Search Library ID or D...

<input type="checkbox"/>	Library ID	Remove f...	Description	Highlight ...	Highlight ...	Reason t...	Price	
<input type="checkbox"/>	PUBLIC		Audience: All UCT Staff				0.00 ZAR	<input type="button" value="&gt;"/>

- 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.

Highlight As	Highlight Until	Reason to Highlight
<input type="text" value="v"/>	<input type="text" value="d/M/yyyy"/>	<input type="text"/>

- 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.

Flagged		
<input type="checkbox"/>	Featured	1
<input type="checkbox"/>	New	1
<input type="checkbox"/>	Revised	1

# 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.](#)

The screenshot shows the course details for 'Effective Communication for Leaders' (ID: 64000). The course is 'Instructor-Led', 'Course (CRSE)', and 'Status: Active'. It has a 'Cover Page: Inactive' and a rating of 5 stars (0 reviews). The revision is 'Version 1, 28/5/2025'. Below the course details is a navigation menu with tabs: 'Item Details', 'Email Notifications', 'Online Content', 'Agenda Template', 'Classes', 'Request Reasons', and 'Class Requests'. The 'Item Details' tab is selected, showing a 'Course Overview' section with a 'Title\*' field containing 'Effective Communication for Leaders'. A character count indicates '265 characters remaining'.

- 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.

The screenshot shows the 'Categories' page for the course. The header indicates 'Categories (0)' with a plus sign (+) to add a category, a close icon (X), and a refresh icon (↕). Below the header is a table with columns 'Category ID' and 'Title'. The table is currently empty, and a message at the bottom states 'There are no categories associated with this item.'

- Click **+** *Add Categories*.

## Items: Working with categories (continued)

4. The *Categories* dialogue box appears.

The screenshot shows a dialog box titled "Categories" with a sub-header "Add Categories To Item". It features a table with 14 rows of categories. Each row includes an ID, a description, a level (all set to 0), and an "Add" checkbox. A vertical scrollbar is visible on the right side of the table. Above the table is an "Add" button. Below the table, there are controls for "Records per Page" (set to 25) and "Select All / Deselect All".

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

- 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 .

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

The screenshot shows a window titled "Categories (2)" with a list of categories. The first row is highlighted in blue and shows "Category ID" and "Title". Below it are two rows: "COMMUNICATION" with title "Communication" and "MGMT\_LEADERSHIP" with title "Management and Leadership". Each row has a checkbox on the left. At the top right of the window are icons for adding (+), removing (⊗), and sorting (↑↓).

Category ID	Title
<input type="checkbox"/> COMMUNICATION	Communication
<input type="checkbox"/> 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](#).

The screenshot shows the 'Effective Communication for Leaders' item page. At the top, the item ID '64000' is visible. Below the title, there is a circular icon with a person and a document. To the right of the icon, the following details are listed: 'Instructor-Led', 'Course (CRSE)', and 'Revision/Date: Version 1, 28/5/2025'. Further right, the status is 'Active' and the cover page is 'Inactive'. A star rating of five stars with '(0)' reviews is also shown. A navigation bar at the bottom of the header includes tabs for 'Item Details', 'Email Notifications', 'Online Content', 'Agenda Template', 'Classes', 'Request Reasons', and 'Class Requests', along with a '+15' dropdown. The main content area is titled 'Course Overview' and features a 'Title\*' field containing 'Effective Communication for Leaders'. A '265 characters remaining' indicator is at the bottom right of the title field.

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

3. The *Surveys* page appears.

The screenshot shows the 'Surveys' page. At the top, the word 'Surveys' is displayed in a large, bold font. Below it, there is a dashed horizontal line. The main heading is 'Edit Surveys for Item', followed by a note: 'Sections that cannot be edited are not accessible. Access all sections in view mode.' Below this, there is a section titled 'Course Feedback Survey : User Satisfaction'. At the bottom of this section, there are three fields: 'Survey:' with a magnifying glass icon and an input field, 'Days to Complete:' with an input field, and 'Required for Item Completion:' with a checkbox.

**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 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 attendance	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.

**Surveys**

**Edit Surveys for Item**  
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

**Course Feedback Survey : User Satisfaction**

Survey:  Days to Complete:  Required for Item Completion:

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

**Course Feedback Survey : User Satisfaction**

Survey:  Days to Complete:  Required for Item Completion:

- 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 .

### 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.

**Follow-up Survey : Application of Learning**

Survey:

Participants:  Manager  Employee  Both

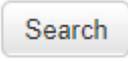
Required for completion by:  Manager  Employee

Configuration: Assign  days from Item completion  
Allow  days To complete

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

## Items: Working with surveys (continued)

- The *Surveys* dialogue box appears.

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

Survey ID	Survey Name	Security Domains	Description	
EVAL_L2	Follow-up Evaluation	PUBLIC	Did the training stick? Have you been able to apply your new knowledge and skill? Tell us more.	<a href="#">Select</a>
Follow_Up_HR	HR Follow Up Survey	HR	HR Follow Up survey. To be used for feedback on behavioural changes after the training session.	<a href="#">Select</a>
HR_Systems_Follow_Up	HR Systems Training: Follow Up Course Evaluation	HR	HR Systems training follow up course evaluation. To be used 30/60 days after training session.	<a href="#">Select</a>

- 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.

**Follow-up Survey : Application of Learning**

Survey:

Participants:  Manager  Employee  Both

Required for completion by:  Manager  Employee

Configuration: Assign  days from Item completion

Allow  days To complete

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

**Follow-up Survey : Application of Learning**

Survey:

Participants:  Manager  Employee  Both

Required for completion by:  Manager  Employee

Configuration: Assign  days from Item completion

Allow  days To complete

- If applicable, change any of the survey options. For more information, see: [Follow up survey options](#).

- Click .

# 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 **OK**.

## Items: Working with prerequisites (continued)

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

Prerequisites			
<input type="checkbox"/>	Title	ID	Type
<input type="checkbox"/>	A: Emotional Intelligence		+

- 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.

**Add Prerequisites**

Items | Curricula

Search

Keyword:

Search All Locales:  Yes  No

Revision Date: (d/M/yyyy)

Revision Number: Starts With

Item Title: Starts With

Item Status:  Active  Not Active  Both

Item Classification: Starts With

Online Settings:  Has online content

Programmes: Starts With

Orders Enabled:  Yes  No  Both

Add/Remove Criteria [+](#) Search Reset

- 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.

**Add a Prerequisite Item to the Item**

Items that are inactive cannot be added as Prerequisites.

Add

Item	Title	Add
CRSE 58001 (Rev 1 - 15/4/2024 11:58 AM Africa/Johannesburg)	Team Leadership using Emotional Intelligence	<input type="checkbox"/>
CRSE LINKEDINLEARNING_10014 (Rev 1 - 12/10/2020 11:31 PM Africa/Johannesburg)	Developing Your Emotional Intelligence (2017)	<input type="checkbox"/>
CRSE LINKEDINLEARNING_7009 (Rev 1 - 3/6/2020 06:08 PM Africa/Johannesburg)	Igniting Emotional Engagement	<input type="checkbox"/>
CRSE LINKEDINLEARNING_7012 (Rev 1 - 3/6/2020 06:14 PM Africa/Johannesburg)	Leading with Emotional Intelligence (2018)	<input type="checkbox"/>

Add

- 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.

Prerequisites				+	✎	⊗	↕
<input type="checkbox"/>	Title	ID	Type				
<input type="checkbox"/>	▼ A: Emotional Intelligence	⊗					+
<input type="checkbox"/>	Developing Your Emotional Intelligence (2017)	CRSE LINKEDINLEARNING_10014 (Rev 1 - 12/10/2020 11:31 PM Africa/Johannesburg)	Item				>
<input type="checkbox"/>	Team Leadership using Emotional Intelligence	CRSE 58001 (Rev 1 - 15/4/2024 11:58 AM Africa/Johannesburg)	Item				>

- 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.

**Course Details**    **Prerequisites**

Choose one of the options to complete your prerequisite for this course.

**A: Emotional Intelligence**

**Team Leadership using Emotional Intelligence**

Instructor-Led Assign to Me

**Developing Your Emotional Intelligence (2017)**

External-Course Assign to Me

**B: Leadership**

**Connected Leadership**

Instructor-Led Assign to Me

**Leading with Emotional Intelligence (2018)**

External-Course Assign to Me

# Items: Creating a survey

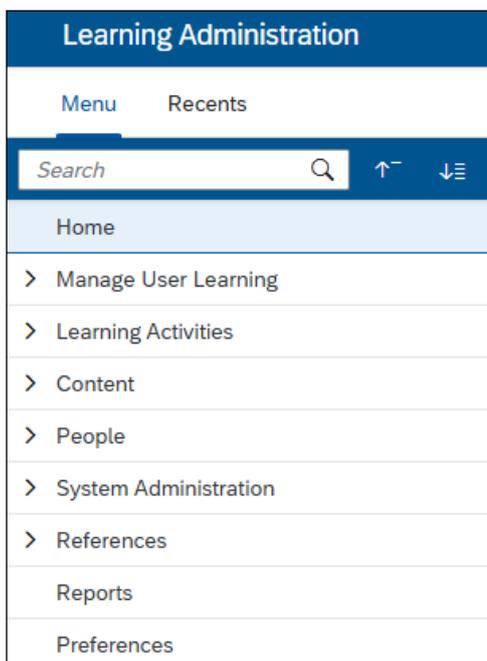
## Background

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.

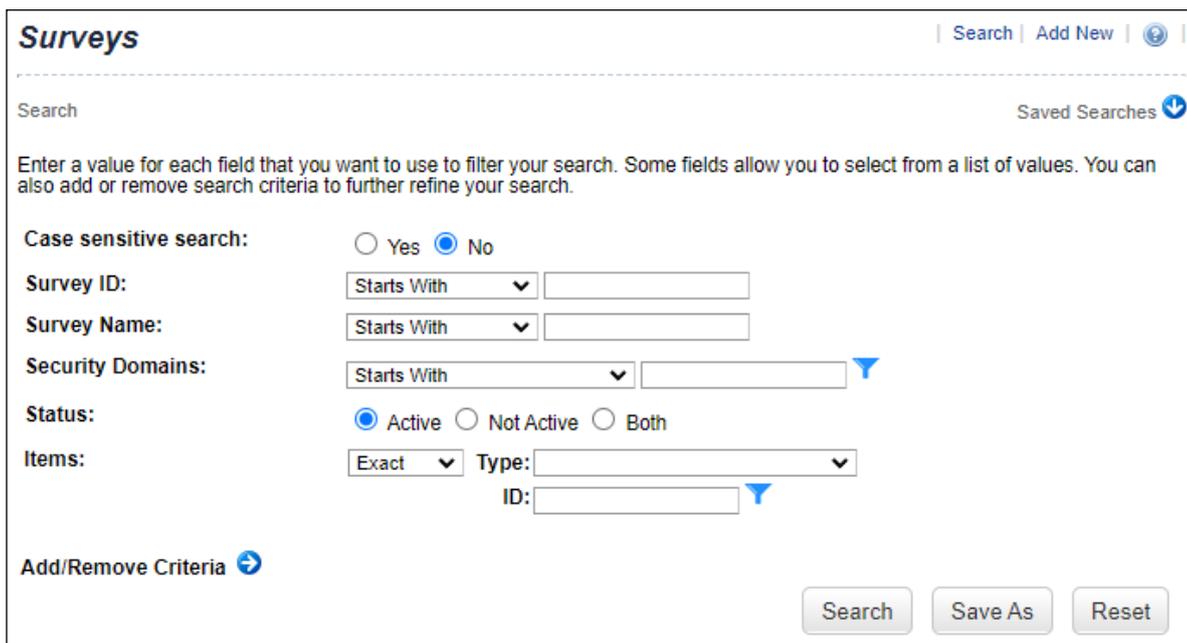
## Procedure

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.

**Add New**

**Surveys**

> Search > Add New

**Add the Survey**

\* = Required Fields

\* Survey ID:

\* Name:

\* Survey Type:

Description:

Comments:

\* Security Domain:

Active:

Add Reset

- 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  to display the list of available domains.
  - Select the area of the university responsible for the survey.
- Click .

## Items: Creating a survey (continued)

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

**Surveys** | Search | Add New | ?

> Search > Edit Summary

Survey ID: Course\_Feedback\_HR\_2022  
Name: Course Feedback HR 2022 🌐

Summary | Questions | Item Usage | Options | Email Notifications

**Edit the Survey**

\* = Required Fields

\* Name: Course Feedback HR 2022 🌐

\* Survey Type: Course Feedback

Description: HR Course feedback survey for 2022. To be used for initial feedback after training session.

- Click the **Questions** tab.

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

**Surveys** | Search | Add New | ?

> Search > Edit Questions

Survey ID: Course\_Feedback\_HR\_2022  
Name: Course Feedback HR 2022 🌐

Summary | **Questions** | Item Usage | Options | Email Notifications

**Edit the Survey**

\* = Required Fields

Preview ▼ | Save Draft | Cancel Draft | Reset | Publish

Survey Instructions:

Expand All | Collapse All

Page 1

+ Resource Type: None ▼

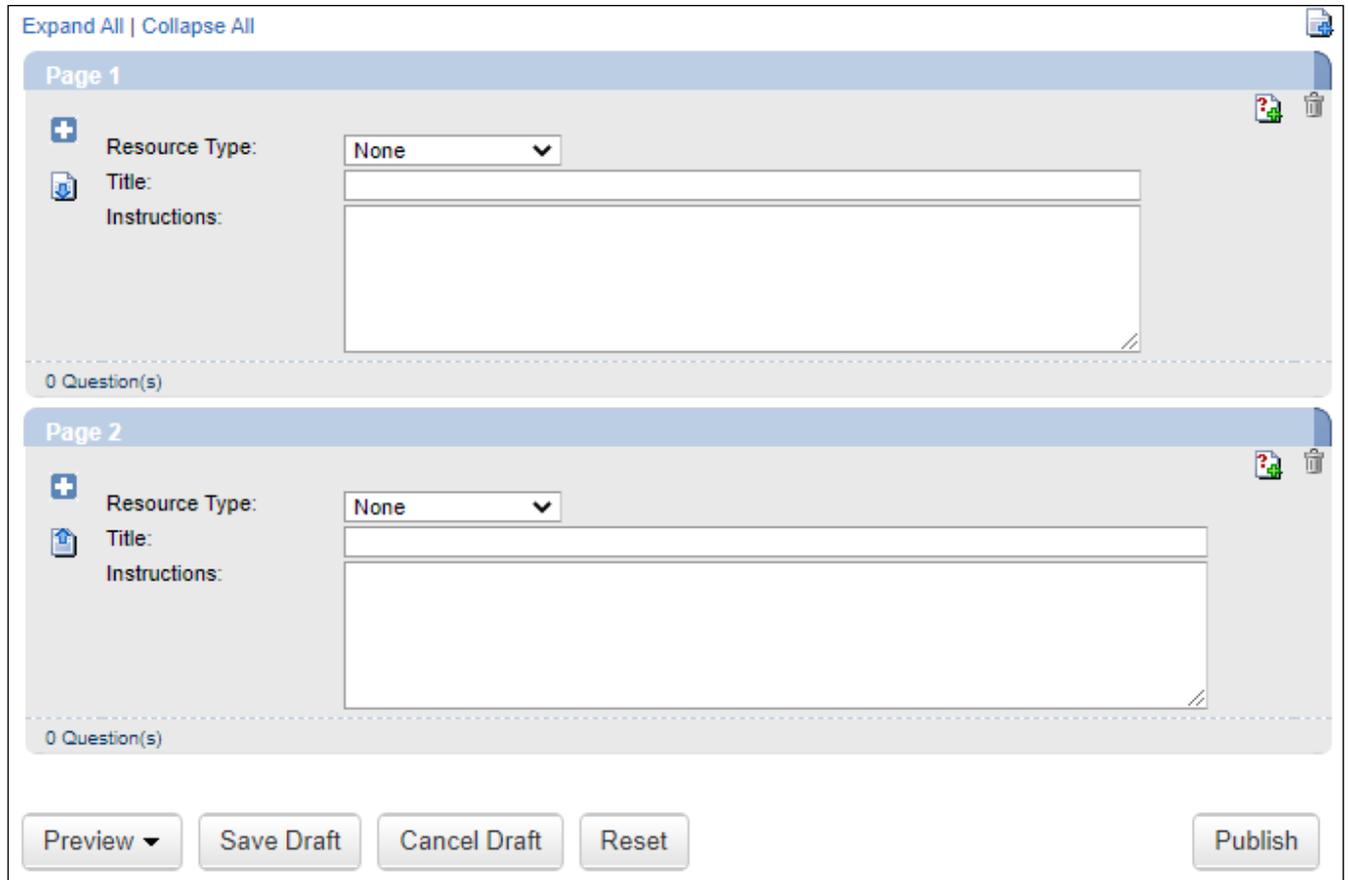
Title:

Instructions:

- 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.



The screenshot displays a web-based interface for creating a survey. At the top, there are links for "Expand All" and "Collapse All". Below this, the interface is divided into two sections, "Page 1" and "Page 2". Each page section contains a "Resource Type" dropdown menu (currently set to "None"), a "Title" text input field, and a larger "Instructions" text area. Below each page section, it indicates "0 Question(s)". At the bottom of the interface, there are five buttons: "Preview" (with a dropdown arrow), "Save Draft", "Cancel Draft", "Reset", and "Publish".

- 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.

### Survey

**Title:** Course Feedback HR 2022  
**Class:**  
**Instructor:**  
**Primary Location:**

This Survey is anonymous

About the course Page 1 of 1

These questions relate to the course.

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

N/A     
  Not at all     
  Sometimes     
  Most of the time     
  Definitely

**2. Any additional comments or suggestions for improvement?**

3990 character(s) remaining

**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  to view the additional pages.
- After reviewing the survey, click .

## Items: Creating a survey (continued)

8. The *Questions* tab reappears.

The screenshot displays a web interface for creating a survey. At the top, there are links for 'Expand All' and 'Collapse All'. Below this, the interface is divided into two sections: 'Page 1' and 'Page 2'. Each page has a 'Resource Type' dropdown menu, a 'Title' text box, and an 'Instructions' text area. Page 1 shows 'Resource Type' set to 'None', 'Title' as 'About the course', and 'Instructions' as 'These questions relate to the course.' Below the instructions, it indicates '2 Question(s)'. Page 2 shows 'Resource Type' set to 'Instructor', 'Title' as 'About the trainer', and 'Instructions' as 'These questions relate to the trainer listed above.' Below the instructions, it indicates '3 Question(s)'. Each page also has a plus icon for adding content and a trash icon for deleting.

- 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 . Click and choose [Draft](#).
- When the editing is complete, click .

## Items: Creating a survey (continued)

9. The *Questions* tab reappears.

Summary **Questions** Item Usage Options Email Notifications

**View the Survey**

Preview Create Draft

Survey Instructions:  
This course feedback survey contains 9 questions and should only take a few minutes to complete. Your candid and thoughtful responses are essential to help improve this course.

Please complete both pages and when finished, submit the survey on the final page.

Expand All | Collapse All

**Page 1**

+ Resource Type: None  
Title: About the course  
Instructions: These questions relate to the course.

2 Question(s)

**Page 2**

+ Resource Type: Primary Instructor  
Title: About the trainer  
Instructions: These questions relate to the trainer listed above.

3 Question(s)

Preview Create Draft

- 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)

Summary Questions Item Usage **Options** Email Notifications

**Edit the Survey Defaults**

Anonymous Surveys:  Yes  No

Required for Item Completion:

Days to Complete:

Include Comments Field for each Question:  Yes  No

Apply Changes Reset

- 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

**Edit the Survey Defaults**

Post Evaluation : Assign  Days from Item completion  
 Allow  Days to Complete

Participants :  Employee  Manager  Both

Required for completion by:  Employee  Manager

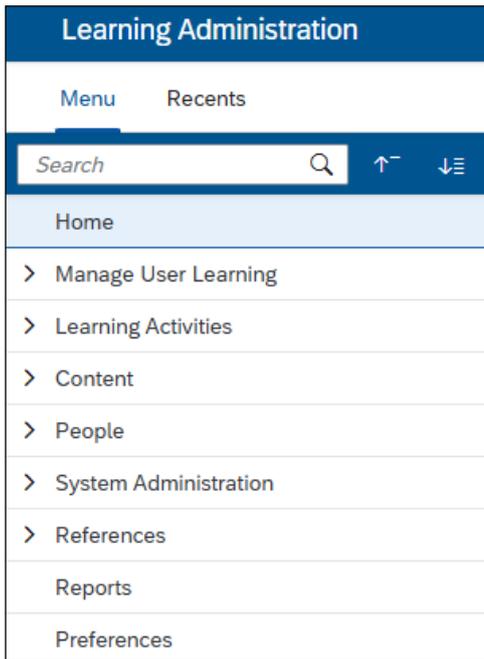
Include Comments Field for each Question:  Yes  No

- 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  to save and refresh the page.
- To view the final survey, return to the **Questions** tab and click . The survey is now ready to be linked to new or existing learning items, see: [Working with surveys](#).

# Viewing submitted survey data

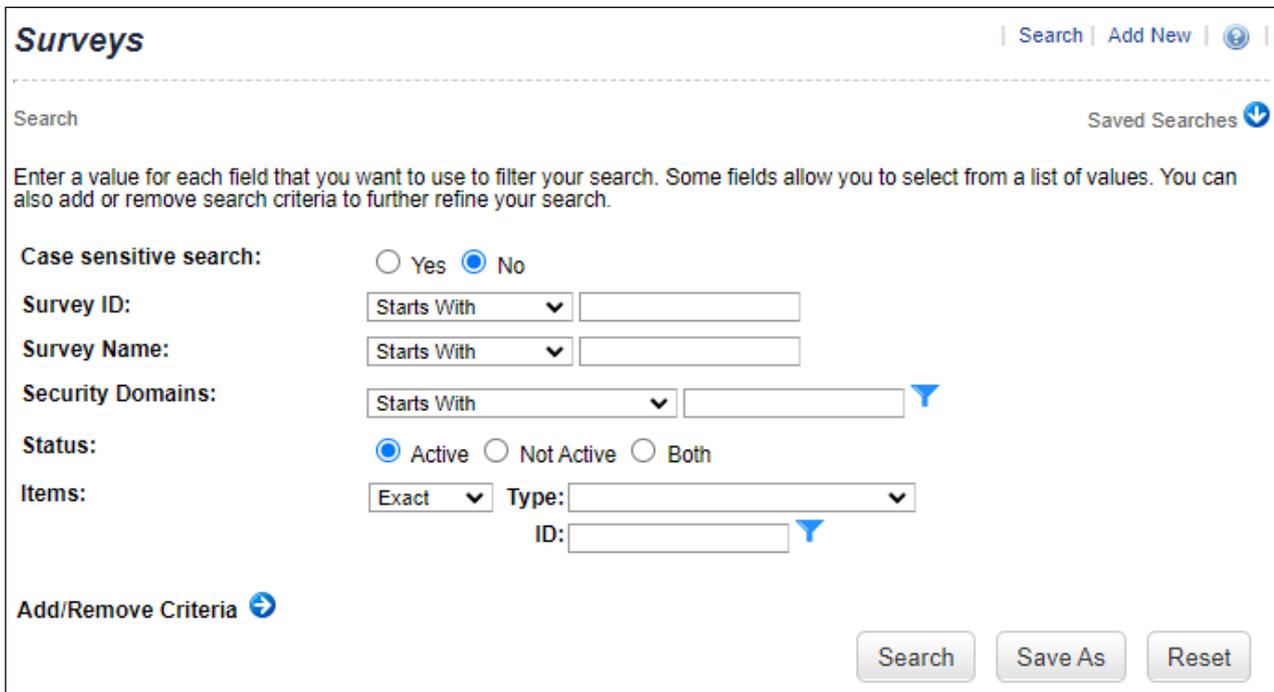
## Procedure

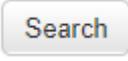
1. [Log in to SuccessFactors and access the Learning Administration page.](#)



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

2. The *Surveys* page appears.



- Click  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.

Survey ID	Survey Name	Security Domains	Description
HR_Systems_Training_Evaluation	HR Systems Training Evaluation	HR	HR Systems training evaluation, used for initial feedback after one-on-one training.
EVAL_L1	Classroom Evaluation	PUBLIC	Evaluation is an important process of a training event; we reflect, analyse and improve its effectiveness and efficiency. Translate
HR_Systems_User_Satisfaction	HR Systems Training Course Evaluation	HR	Old HR Systems training course evaluation. To be used for initial feedback after training session.
HR_Systems_Follow_Up	HR Systems Training: Follow Up Course Evaluation	HR	HR Systems training follow up course evaluation. To be used 30/60 days after training session.

- Click  alongside the appropriate survey.

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

### Surveys

| Search | Add New | 

---

> Search > **Search Results** > Edit Summary

Survey ID: HR\_Systems\_Course\_Evaluation

Name: HR Systems Course Evaluation 

Summary
Questions
Item Usage
Options
Email Notifications

#### Edit the Survey

\* = Required Fields

\* Name:  

\* Survey Type: Course Feedback

Description:  

Comments:

\* Security Domain:

Active:

- Click the **Item Usage** tab.

## Viewing submitted survey data (continued)

5. The *Item Usage* tab appears.

Survey ID: HR\_Systems\_Course\_Evaluation  
Name: HR Systems Course Evaluation

Summary

Questions

**Item Usage**

Options

Email Notifications

**Edit Item for the Survey**

---

**Add an Item to the Survey**

Enter Item ID or [add one or more from list](#)

Type

Item ID

**Update the Item Usage for the Survey**

[Select All / Deselect All](#)

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	<input type="checkbox"/>
CRSE 30002 (Rev 1 - 20/4/2022 09:18 AM Africa/Johannesburg)	1	0	0	0.00	N/A	<input type="checkbox"/>
CRSE 35001 (Rev 1 - 28/7/2022 10:49 AM Africa/Johannesburg)	4	2	0	50.00	3.8	<input type="checkbox"/>
CRSE 35002 (Rev 1 - 29/7/2022 11:53 AM Africa/Johannesburg)	1	1	0	100.00	3.7	<input type="checkbox"/>

[Select All / Deselect All](#)

- 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  .

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

**Reports**

---

Please wait...

Report Title **Surveys**

Status **Waiting in Queue**

Your report is in the queue and will start automatically as long as you do not close this page. (If you close the page, the report will be automatically cancelled.) If you do not wish to wait on this page for your report, you can choose one of the options below.

## 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 )

<b>Classes:</b> 1	<b>Mean Score:</b> N/A	<b>Total Surveys:</b> 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:

<b>Primary Instructor</b> Ms Trainer	<b>Answer</b> 3 - Good	1  100%
---	---------------------------	---------

**Total Respondents:** 1

---

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

<b>Primary Instructor</b> Ms Trainer	<b>Answer</b> 3 - Good	1  100%
---	---------------------------	---------

**Total Respondents:** 1

---

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

<b>Primary Instructor</b> Ms Trainer	<b>Answer</b> 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.

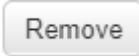
## Procedure

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  .

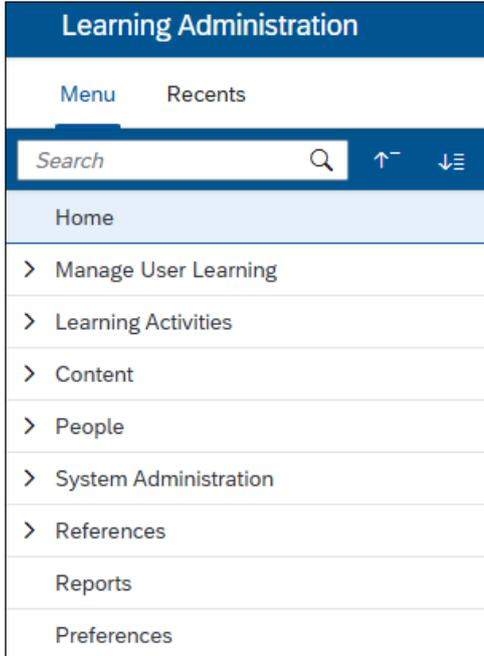
# Creating an instructor

## Background

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

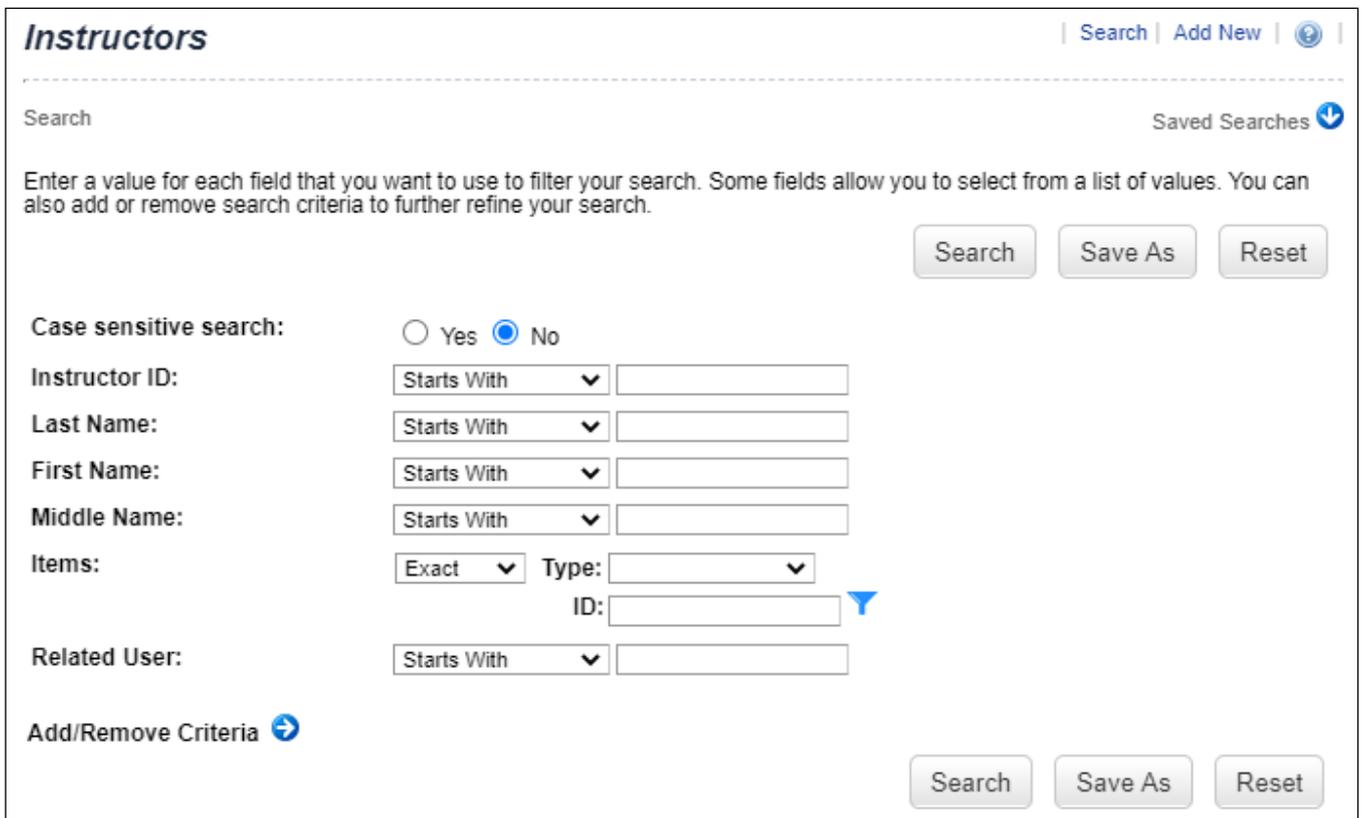
## Procedure

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.

**Add New**

**Instructors**

> Add New

**Add New Instructor**

\* = Required Fields  
First Name, Last Name and Instructor Email are required for VLS support.

Add Reset

\* Instructor ID:

Last Name:  First Name:  Middle Name:

Company:

\* Security Domain:

\* Role:

Organisation:

Time Zone:

Email Address:

Comments:

Biography:

Active:

Related User:

**Authorised to Teach**

Item ID:

Type:

**VLS Settings**

VLS Server:

Account ID:

Account Password:

Action:  Create New Account  Use Existing Account

Add Reset

- 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 .

## Creating an instructor (continued)

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

**Instructors** | Search | Add New | ?

---

> Search > Edit Summary

**Instructor ID:** 013

**Name:** New Instructor, Ms

VLS Settings	Proctor Status	Base Cost	Additional Costs	Item Costs	
<b>Summary</b>	Custom Fields	Authorised to Teach	Scheduling	Regions	Shipping Info

**Edit the Instructor**

\* = Required Fields  
First Name, Last Name and User Email are required for VLS support.

**Last Name:**

**First Name:**

**Middle Name:**

**Company:**

\* **Security Domain:**

\* **Role:**  ▼

**Organisation:**

**Time Zone:**  ▼

**Email Address:**

**Comments:**

**Biography:**

**Active:**

**Related User:**

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

# 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](#).

Effective Communication for Leaders  
64000

Instructor-Led      Status: Active      ★★★★★ (0)  
Course (CRSE)      Cover Page: Inactive  
Revision/Date: Version 1, 28/5/2025

Item Details    Email Notifications    Online Content    Agenda Template    Classes    Request Reasons    Class Requests    +15

Course Overview

Title\*:  
Effective Communication for Leaders

265 characters remaining

- In the item menu, click *Instructor* or select it from the dropdown menu on the right.
3. The *Instructors* page appears.

**Instructors**

**Edit the Item**  
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Check Instructor Authorisation:

Apply Changes    Reset

**Add an Authorised Instructor to an Item**

Enter Instructor ID or [add one or more from list](#).

Instructor ID:     Add    Reset

**Update the Authorised Instructors for the Item**

There are no authorised instructors associated with this item.

- 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.

### Search Instructors

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.

**Keyword:**

**Last Name:** Starts With ▼

**First Name:** Starts With ▼

**Middle Name:** Starts With ▼

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

**Status:**  Active  Not Active  Both

**Related User:** Starts With ▼

**Add/Remove Criteria** ➔

- Click .

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

### Instructors | [Help](#) |

> Search Results

#### Add Authorised Instructors To Item

Instructor ID	Name	Select
014	A	<input type="checkbox"/>
013	A	<input type="checkbox"/>
014	A	<input type="checkbox"/>
013	C	<input type="checkbox"/>
Ext_G	C	<input type="checkbox"/>
014	D	<input type="checkbox"/>

Records per Page 50 ▼ Page: 1 2 «Previous Next» (54 total records) Page 1 of 2   
Select All / Deselect All

- 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 .

## 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.

### Instructors

---

#### Edit the Item

Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

---

Check Instructor Authorisation:

Apply Changes
Reset

---

#### Add an Authorised Instructor to an Item

Enter Instructor ID or [add one or more from list.](#)

Instructor ID:


Add
Reset

---

#### Update the Authorised Instructors for the Item

Apply Changes
Reset

[Select All / Deselect All](#)

Instructor ID	Name	Organisation	Remove
013	D	HR Analytics, Risk, Systems, Payroll, Admi	<input type="checkbox"/>
014	Instructor, Ms	Human Resource Department	<input type="checkbox"/>

[Select All / Deselect All](#)

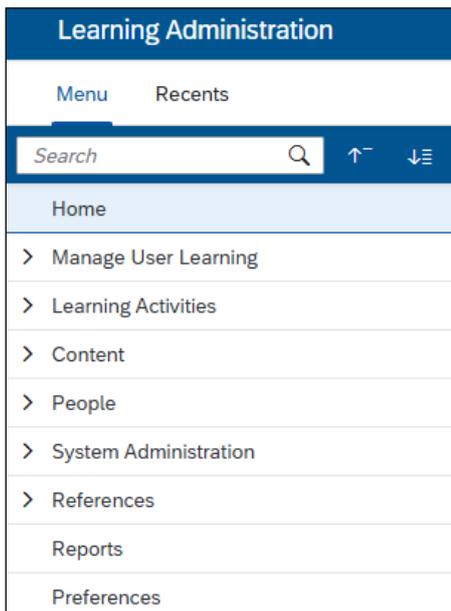
Apply Changes
Reset

- 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

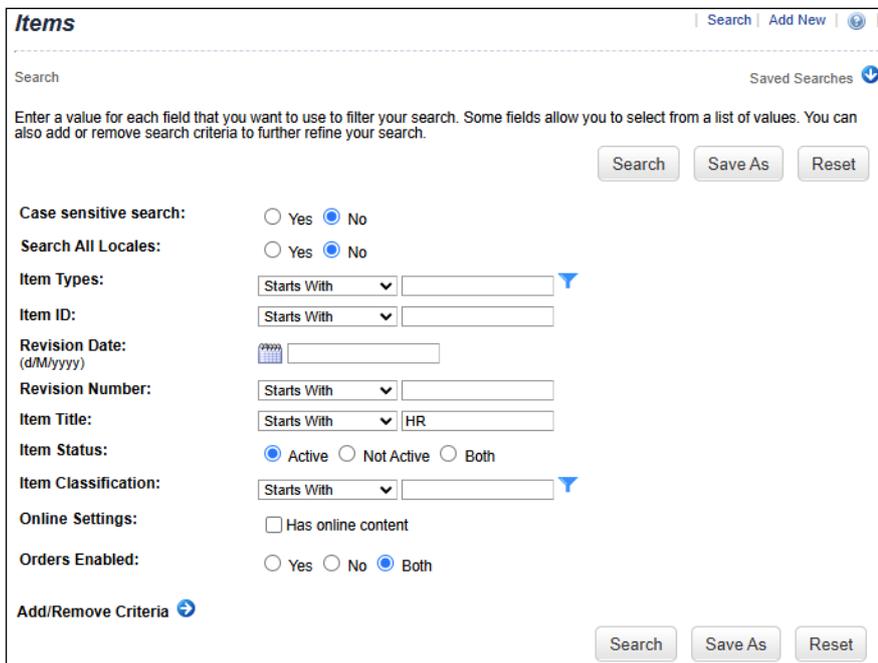
1. [Log in to SuccessFactors and access the Learning Administration page.](#)



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

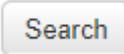
2. The *Items* page appears.

If you have previously saved a search, see: [Searching for an item using a saved search.](#)

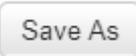


- To find your item(s), enter search criteria in any of the available fields e.g. *Item Title*.
- To add additional search fields (e.g. *Security Domains, UCT area that created the item*), click  alongside *Add/Remove Criteria*.
  - In the *Search Criteria* dialogue box, select the applicable fields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

Field Chooser 		Download Search Results 
Records per Page	50	Page: 1 2 3 4 5 «Previous Next» (390 total records) Page 1 of 8 Go
Item	Title	
<a href="#">CRSE 1000009</a> (Rev 1 - 1/8/2018 10:00 AM Africa/Johannesburg)	Introduction to UCT for new staff	
<a href="#">CRSE 1000027</a> (Rev 1 - 1/8/2018 10:00 AM Africa/Johannesburg)	Certificate in Business Administration (SAQA Qualification ID: 61595 LP 93569, NQF Level 4)	
<a href="#">CRSE 10001</a> (Rev 1 - 18/2/2020 08:39 AM Africa/Johannesburg)	SuccessFactors Learning for Learning Administrators	
<a href="#">CRSE 16023</a> (Rev 1 - 28/1/2021 11:30 PM Africa/Johannesburg)	Certificate in Strategic Management (SAQA Qualification ID: 74512, NQF Level 5)	
<a href="#">CRSE 19009</a> (Rev 1 - 22/4/2021 10:12 AM Africa/Johannesburg)	Certificate in Management (SAQA Qualification ID: 57712 LP 74630, NQF Level 4)	
<a href="#">CRSE 2006</a> (Rev 1 - 15/3/2019 04:49 PM Africa/Johannesburg)	English for Everyone	
<a href="#">CRSE 2008</a> (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 .
- 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 .
  - The *Saved Searches* page appears.

**Saved Searches** Search 

> Search > Save Search

**Save Search**

\* = Required Fields

\* Saved Search ID:

Description:

- 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 .
- 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.

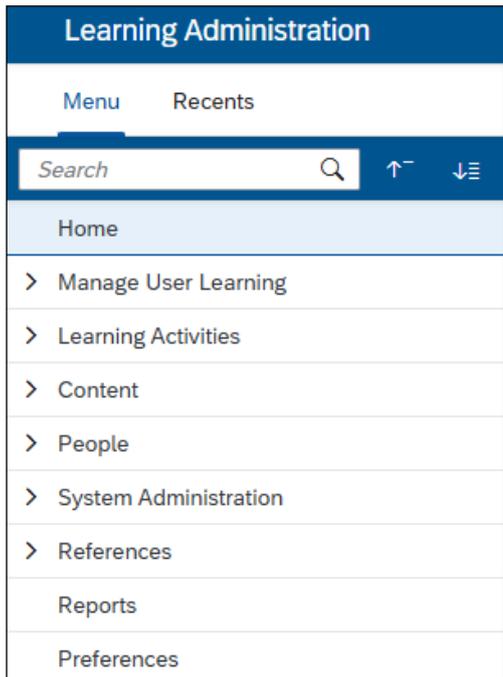
The screenshot shows the 'Item Details' page for 'Communication Fundamentals'. At the top left, it says 'Item Search' and 'Communication Fundamentals' with the ID '58000'. On the right, there is an 'Actions' dropdown menu. Below the title, there is a circular icon with a person and a document. To the right of the icon, the text reads: 'Instructor-Led Course (CRSE)', 'Revision/Date: Version 1, 15/4/2024', 'Status: Active', 'Cover Page: Inactive', and a 5-star rating with '(4)' reviews. Below this information is a horizontal navigation bar with tabs: 'Item Details' (selected), 'Email Notifications', 'Online Content', 'Agenda Template', 'Classes', 'Request Reasons', and 'Class Requests'. There is a '+15' dropdown arrow on the right of the navigation bar. Below the navigation bar, the 'Course Overview' section is visible. It has two input fields: 'Title \*:' with the value 'Communication Fundamentals' and a globe icon, and 'Audience:' with the value 'No audience in current locale.' and a globe icon.

- 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

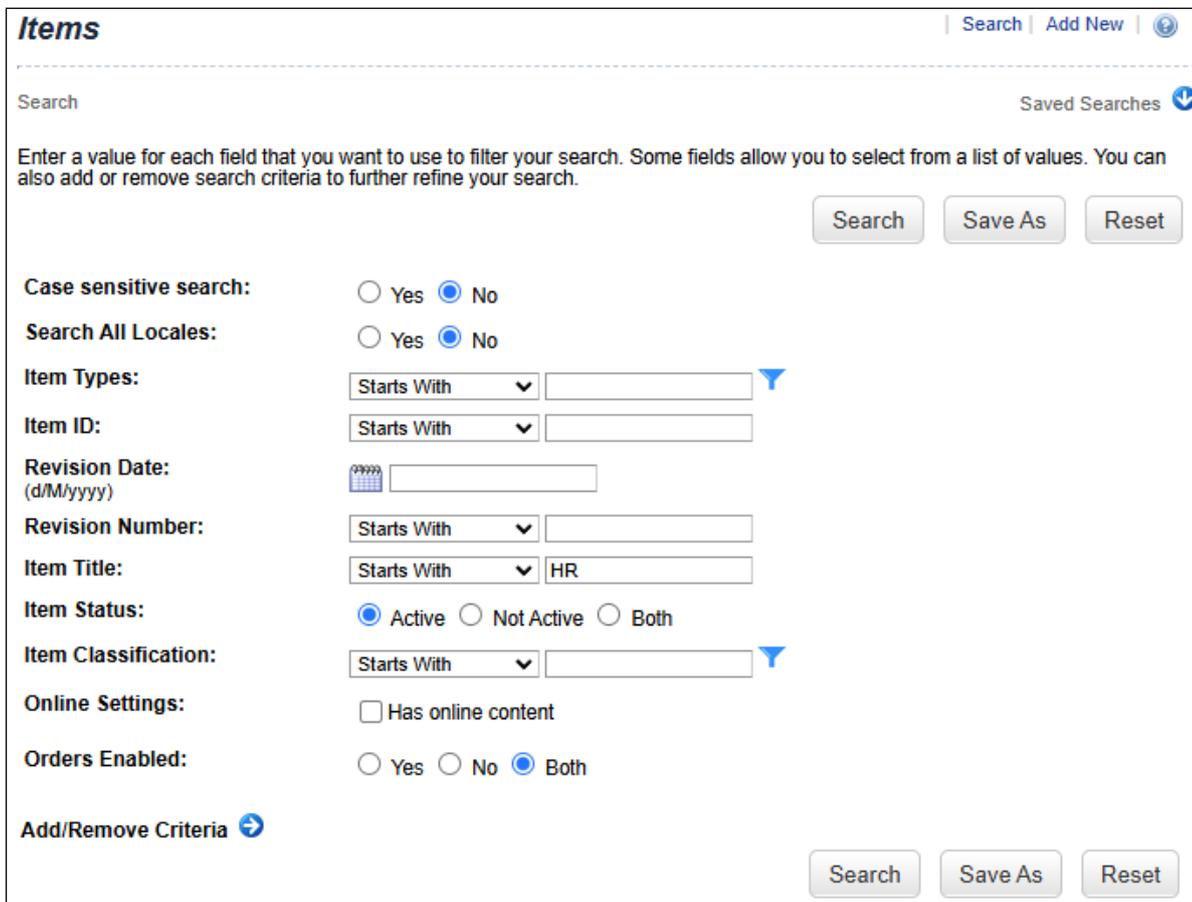
## Procedure

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*.

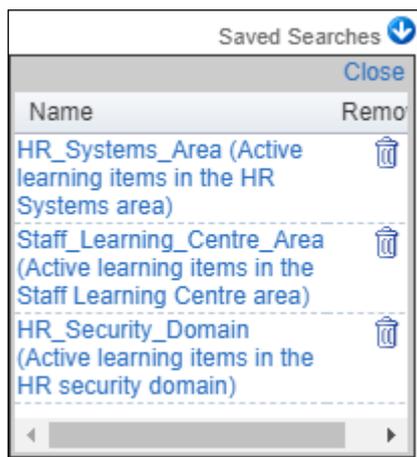
2. The *Items* page appears.



- 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.

**Items** | Search | Add New |

---

Search Saved Searches

**Saved Search ID:** Staff\_Learning\_Centre\_Area  
**Description:** Active learning items in the Staff Learning Centre Area

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

**Search All Locales:**  Yes  No

**Item Types:** Starts With

**Item ID:** Starts With

**Revision Date:**

**Revision Number:** Starts With

**Item Title:** Starts With

**Item Status:**  Active  Not Active  Both

**Item Classification:** Starts With

**Online Settings:**  Has online content

**UCT area that created the Item:** [1 Selected]

**Orders Enabled:**  Yes  No  Both

**Add/Remove Criteria**

- Click  .

# Searching for an item using a saved search (continued)

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

Field Chooser 		Download Search Results 
Records per Page <input type="text" value="50"/> (50 total records)		
Item	Title	
<a href="#">CRSE 1000009</a> (Rev 1 - 1/8/2018 10:00 AM Africa/Johannesburg)	Introduction to UCT for new staff	
<a href="#">CRSE 1000027</a> (Rev 1 - 1/8/2018 10:00 AM Africa/Johannesburg)	Certificate in Business Administration (SAQA Qualification ID: 61595 LP 93569, NQF Level 4)	
<a href="#">CRSE 16023</a> (Rev 1 - 28/1/2021 11:30 PM Africa/Johannesburg)	Certificate in Strategic Management (SAQA Qualification ID: 74512, NQF Level 5)	
<a href="#">CRSE 19009</a> (Rev 1 - 22/4/2021 10:12 AM Africa/Johannesburg)	Certificate in Management (SAQA Qualification ID: 57712 LP 74630, NQF Level 4)	
<a href="#">CRSE 2006</a> (Rev 1 - 15/3/2019 04:49 PM Africa/Johannesburg)	English for Everyone	
<a href="#">CRSE 2008</a> (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.

Item Search
Actions 

## English for Everyone

2006



Instructor-Led  
Course (CRSE)  
Revision/Date: Version 1, 15/3/2019

Status: Active  
Cover Page: Inactive

★★★★★ (0)

Item Details
Email Notifications
Online Content
Agenda Template
Classes
Request Reasons
Class Requests
+15 

Course Overview

Title\*:  

Audience:  

- 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.

**Items**
| Search | Add New | 

---

Search
Saved Searches 

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

Search All Locales:
 Yes  No

Item Types:
Starts With  

Item ID:
Starts With

Revision Date:  
(d/M/yyyy)


Revision Number:
Starts With

Item Title:
Starts With

Item Status:
 Active  Not Active  Both

Item Classification:
Starts With  

Online Settings:
 Has online content

Security Domains:
Starts With  

UCT area that created the Item:
Starts With  

Orders Enabled:
 Yes  No  Both

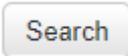
Add/Remove Criteria 

**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.

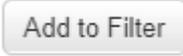
## Using search filters for security domain and/or UCT area (cont)

- The *Create Filter* dialogue box appears.

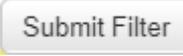
- Click .
- The *Create Filter* dialogue box reappears, displaying all the security domains you have authorisation to use.

ID	Description	Levels	Top Level Only	Include Security Subdomains
HR	Human Resources	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> PUBLIC	Default Public Access Domain	0	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> INT	Internal Staff	1	<input type="checkbox"/>	<input type="checkbox"/>

- Select the appropriate domain (e.g. Human Resources) using the check box in the *Top Level Only* column.

- Click .

- The filter section in the top right of the dialogue box indicates the number of filters selected

- Click .

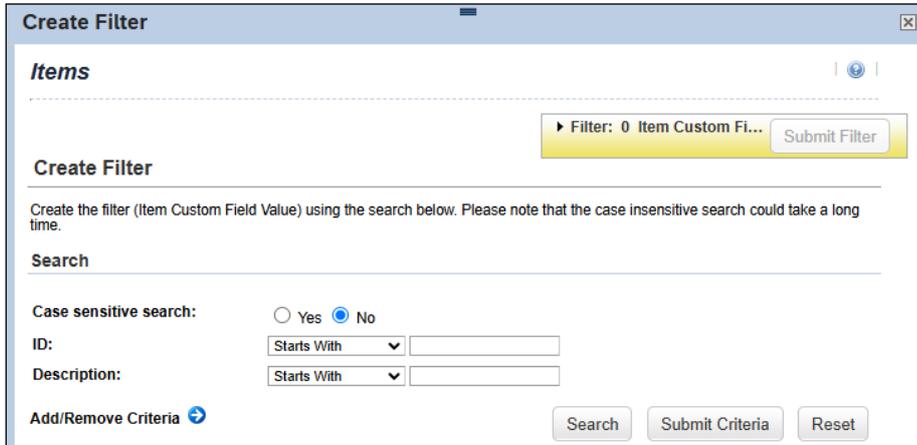
- The *Items* page reappears with the selected filter applied.

- Continue with [step 2 of Searching for an item](#).

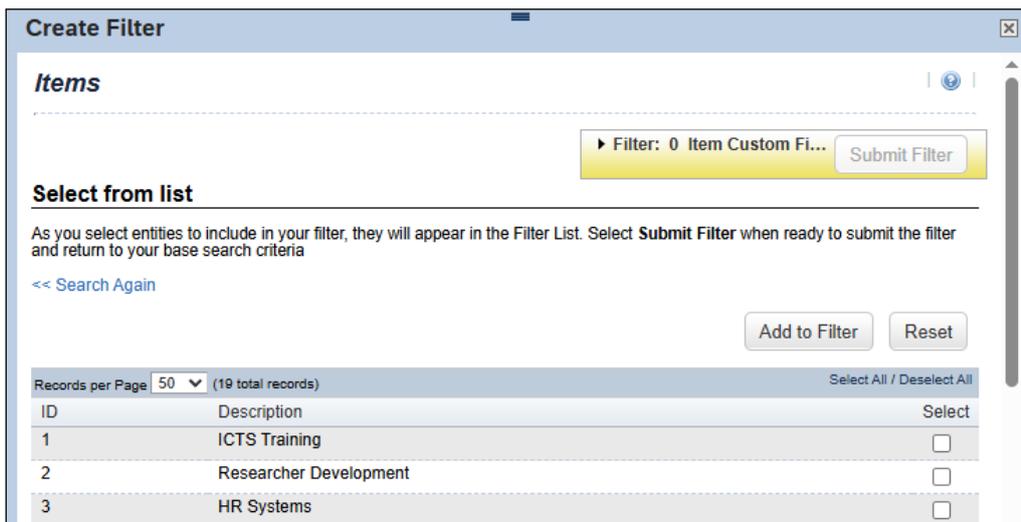
# Using search filters for security domain and/or UCT area (cont)

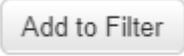
## Filter by UCT area that created the item

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

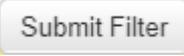


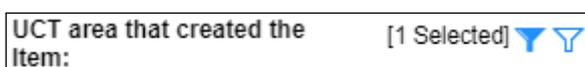
- Click .
- The *Create Filter* dialogue box reappears, displaying all available UCT areas.



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



- Click  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.](#)

The screenshot displays the 'Effective Communication for Leaders' course page. At the top, the course title and ID '64000' are shown. Below this, a circular icon with a person and a document is visible. To the right, the course is identified as 'Instructor-Led Course (CRSE)' with a 'Status: Active' and 'Cover Page: Inactive'. A star rating of five stars with '(0)' reviews is also present. A 'Revision/Date: Version 1, 28/5/2025' is noted at the bottom of the header. A navigation bar includes tabs for 'Item Details', 'Email Notifications', 'Online Content', 'Agenda Template', 'Classes', 'Request Reasons', and 'Class Requests', with a '+15' dropdown. The 'Course Overview' section shows a 'Title\*' field containing 'Effective Communication for Leaders' and a '265 characters remaining' indicator.

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

3. The *Schedule* dialogue box appears.

The screenshot shows the 'Schedule' dialog box with the 'Add New Class' form. A red asterisk indicates required fields. The '1. Summary Information' section includes:
 

- \* Type:  Item  Resource Block
- \* Item Type: Course (CRSE) (dropdown menu)
- \* Item ID: 64000 (text field)
- \* Security Domain: HR (text field)
- Description: (text area)
- Short Description: (text area)
- Libraries:  Publish in all associated libraries. Libraries may be individually removed from the Class.

 The course name 'Effective Communication for Leaders' is displayed at the bottom of the form.

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:

**2. Class Information**

Facility:  +

Primary Location:

\* Start Date: (d/M/yyyy)

\* Start Time: (hh:mm AM/PM)

\* Time Zone:

- 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  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.

**3. Resources**

Primary Instructor:

Manage Equipment:

VLS Server:

Password:

Resource Usage View:

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:

**3. Resources**

Primary Instructor:   

Manage Equipment:   

VLS Server:  

Password:

Resource Usage View:   

- 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.

**3. Resources**

Primary Instructor:    Notify Instructor

Manage Equipment:

VLS Server:

Password:

Resource Usage View:

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)

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.

**4. Special Requests Custom Fields**

Custom Fields  

Label	Order	Remove	<input type="checkbox"/> Select All

- Click   *Custom Fields* and choose [Custom Fields](#).

## Creating a class (continued)

- The *Custom Fields* dialogue box appears.

**Custom Fields**

**Special Requests Custom Fields**

Search

**Search** Results

**Search Special Requests Custom Fields**

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

Field Number: Starts With

Label: Starts With

Add/Remove Criteria [➔](#) **Search** **Reset**

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

**Custom Fields**

**Custom Fields** | [Help](#)

Search **Results**

**Add Special Requests Custom Fields to Class**

Field Number	Label	Add
Records per Page 50 (6 total records) <a href="#">Select All / Deselect All</a>		
10	* Fund Number	<input type="checkbox"/>
11	* Cost Centre	<input type="checkbox"/>
12	* Email address of Fund Holder	<input type="checkbox"/>
13	Dietary Requirements	<input type="checkbox"/>
14	Food Allergies	<input type="checkbox"/>
15	Disability Accommodations Requirements	<input type="checkbox"/>
Records per Page 50 (6 total records) <a href="#">Select All / Deselect All</a>		

**Add**

- 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).

4. Special Requests Custom Fields

**Custom Fields** +

Label	Order	Remove	<input type="checkbox"/> Select All
* Fund Number	▼	<input type="checkbox"/>	
* Cost Centre	▲ ▼	<input type="checkbox"/>	
* Email address of Fund Holder	▲ ▼	<input type="checkbox"/>	
Dietary Requirements	▲ ▼	<input type="checkbox"/>	

Remove

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

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

Class Search Actions ▾

### Effective Communication for Leaders

79006

Start Date: 21/7/2025 08:30 am	Instructor: Ms Instructor	Enrolled: 0
End Date: 22/7/2025 04:30 pm	Location: Cambria Training Room (CAMB_TRAIN)	Waitlisted: 0
Time Zone: South Africa Standard Time (Africa/Johannesburg)	Facility: Cambria House (CAMBRIA)	Open Seats: 20
<b>CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)</b>	Virtual Class: No	

Status: Active

^ 📌

Details
Email Notifications
Registrations
Seat Reservations
Agenda
Special Requests
Libraries
Contacts
+5 ▾

Time Zone

All times are shown in your preferred time zone.

Class Time Zone\*: South Africa Standard Time (Africa/J...

View Times in the Class Time Zone:  Yes  No

- 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.

Details
Email Notifications
Registrations
Seat Reservations
Agenda
Special Requests
Libraries
Contacts
+5 ▾

## Creating a class (continued)

In the *General* section:

<b>General</b> Description: July 2025 3991 characters remaining		Contact Name: _____
Short Description: No short description in current locale. 100 characters remaining		Contact Email Address: _____
		Instructor: Ms Instructor

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

Show Virtual Class indicator to users: <input type="radio"/> Yes <input checked="" type="radio"/> No	Primary Location: Cambria Training Room (CAMB_TRAIN)	Facility: Cambria House (CAMBRIA) +
Registration Close Date: d/M/yyyy	Registration Close Time: hh:mm aaa	Registration Close Time Zone: South Africa Standard Time (Africa/...
Last Date to Withdraw: d/M/yyyy	Withdraw End Time: hh:mm aaa	Withdraw End Time Zone: South Africa Standard Time (Africa/...
Require Withdrawal Reason: <input checked="" type="radio"/> Yes <input type="radio"/> No		

- 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:

<b>Registration Settings</b>		
Minimum Enrolments: 1	Maximum Enrolments: 20	Registration Status: 0 of 20 enrolled, 0 waitlisted
User can Self-Register: <input checked="" type="radio"/> Yes <input type="radio"/> No	Manager can Register Others: <input checked="" type="radio"/> Yes <input type="radio"/> No	User can Waitlist: <input checked="" type="radio"/> Yes <input type="radio"/> No
Auto Enrol from Waitlist: <input checked="" type="radio"/> Yes <input type="radio"/> No	Unassign Item When Admin Withdraws: <input checked="" type="radio"/> Yes <input type="radio"/> No	

- Review and make any required changes.

## Creating a class (continued)

In the *Approval Process* section:

**Approval Process**

Approval Required:  Yes  No

Approval Process: Manager Approval (Manager Approval) ▾

Approval required to withdraw:  Yes  No

Withdraw Approval Process: ▾

User can withdraw when class is assigned by a manager:  Yes  No

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

In the *Completion* section:

**Completion**

Certificate Template: UCT Certificate of Attendance (Cert\_Attend... ▾

- 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)**

**Effective Communication for Leaders**  
79006

Start Date: 21/7/2025 08:30 am  
 End Date: 22/7/2025 04:30 pm  
 Time Zone: South Africa Standard Time (Africa/Johannesburg)

**CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)**

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[Details](#)   [Email Notifications](#)   [Registrations](#)   [Seat Re](#)

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

Classes (2) <span style="float: right;">↑↓ [≡]</span>						
ID	Start Date	End Date	Time Zone	Number Enrolled	Maximum Enrolments	Enrolment Status
79006	21/7/2025 08:30 am	22/7/2025 04:30 pm	Africa/Johannesburg	0	20	>
Primary Location: Cambria Training Room						
79007	4/8/2025 09:00 am	5/8/2025 05:00 pm	Africa/Johannesburg	0	20	>
Primary Location:						

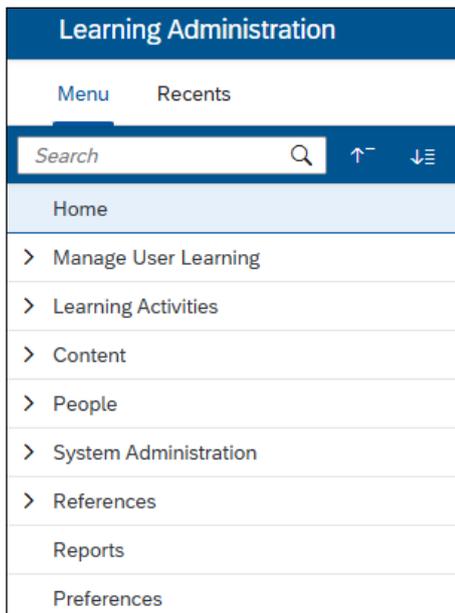
# Searching for a class

## 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

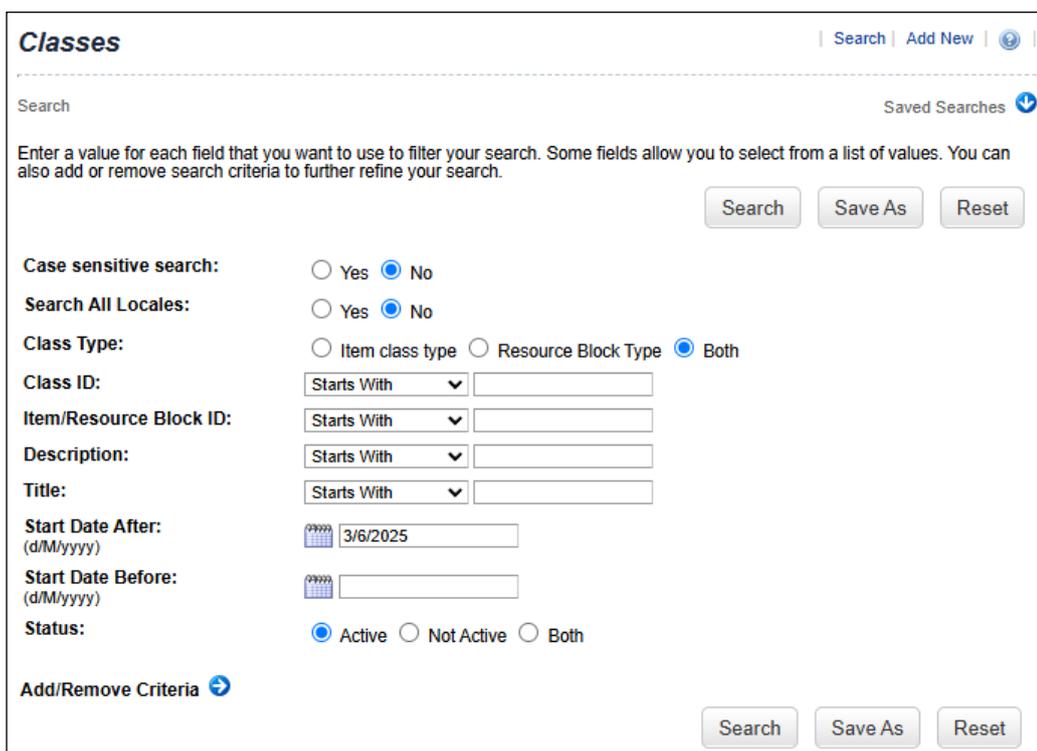
1. [Log in to SuccessFactors and access the Learning Administration page](#).



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

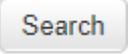
2. The *Classes* page appears.

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

Records per Page

50

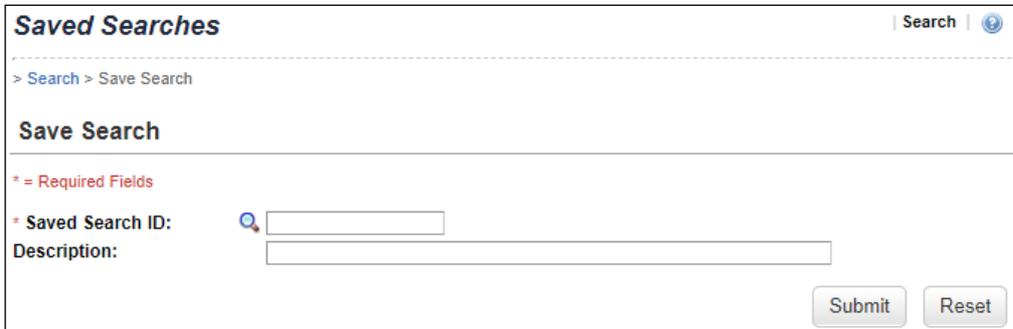
(13 total records)

- 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  tab to see classes listed by month.

## Searching for a class (continued)

- To save the search to use again, click . **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.



**Saved Searches** | Search | 

> Search > Save Search

**Save Search**

\* = Required Fields

\* Saved Search ID:

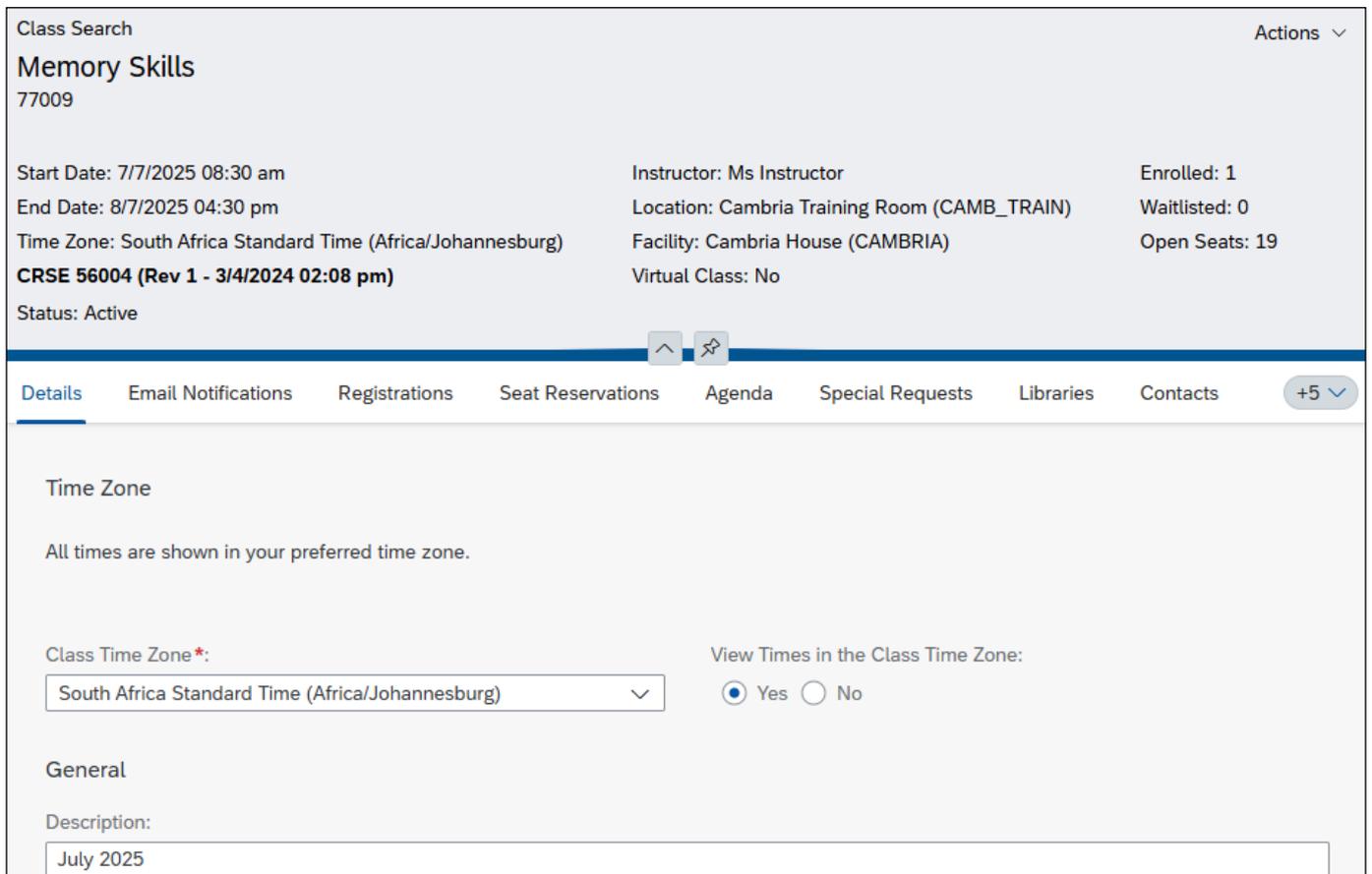
Description:

- Enter the *Saved Search ID* name e.g. HR\_Domain\_Classes.
- Enter a *Description* e.g. Active classes in the HR security domain.

- Click .

- 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.

- The class *Details* page appears.



Class Search Actions ▾

**Memory Skills**  
77009

Start Date: 7/7/2025 08:30 am	Instructor: Ms Instructor	Enrolled: 1
End Date: 8/7/2025 04:30 pm	Location: Cambria Training Room (CAMB_TRAIN)	Waitlisted: 0
Time Zone: South Africa Standard Time (Africa/Johannesburg)	Facility: Cambria House (CAMBRIA)	Open Seats: 19
<b>CRSE 56004 (Rev 1 - 3/4/2024 02:08 pm)</b>	Virtual Class: No	
Status: Active		

Details | Email Notifications | Registrations | Seat Reservations | Agenda | Special Requests | Libraries | Contacts +5 ▾

**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone\*:  ▾

View Times in the Class Time Zone:  Yes  No

**General**

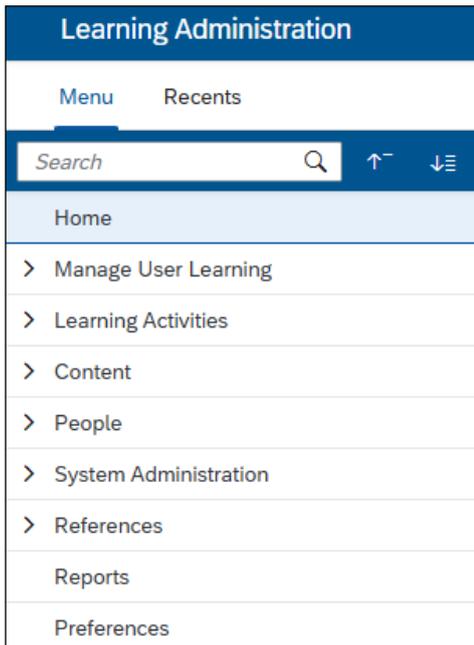
Description:

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

# Searching for a class using a saved search

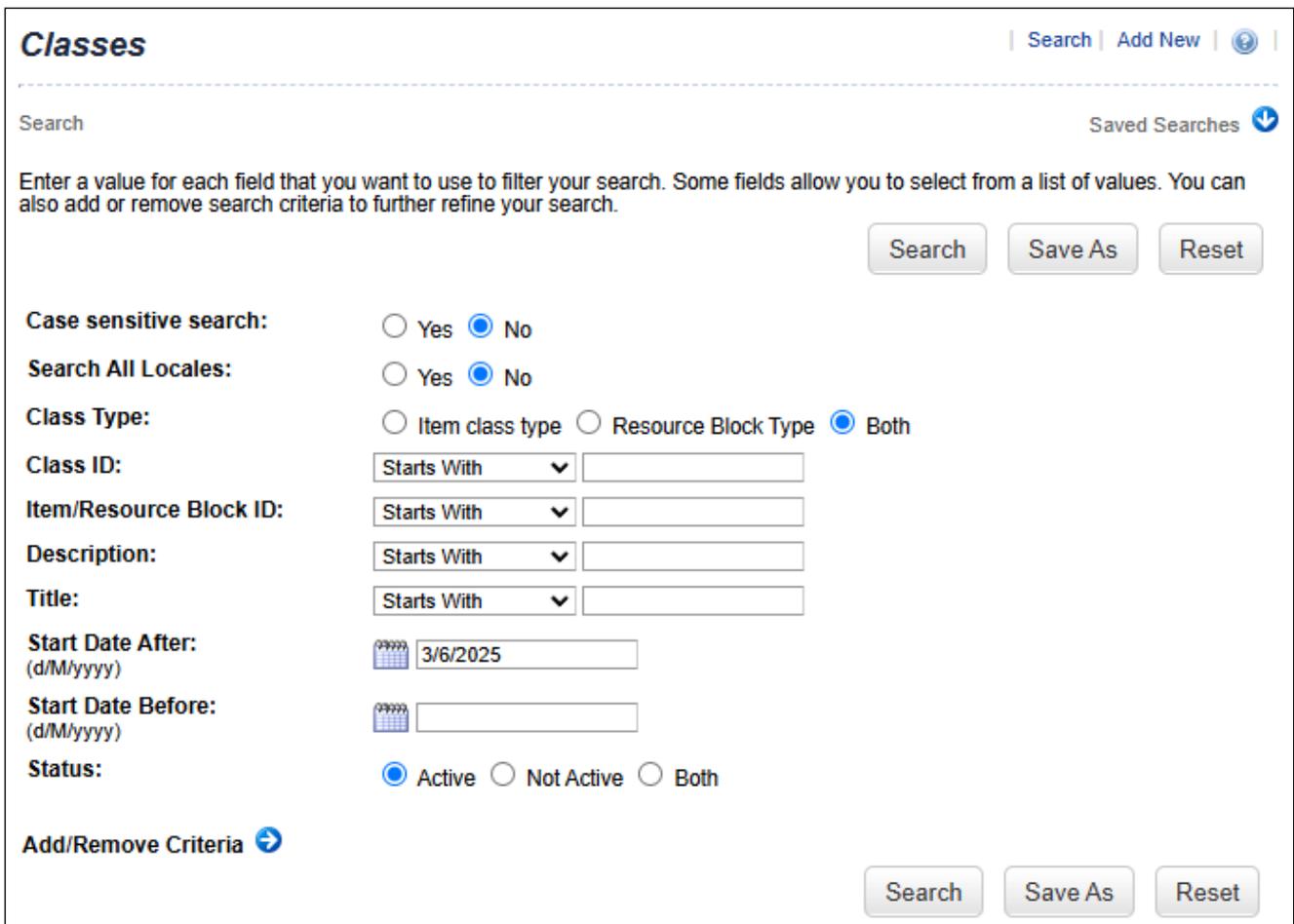
## Procedure

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*.

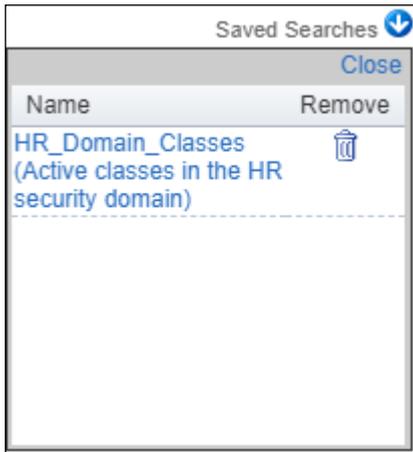
2. The *Classes* page appears.



- Click alongside *Saved Searches*.

## Searching for a class using a saved search (continued)

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



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

- 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.

**Classes** | Search | Add New | ?

---

Search Saved Searches ↓

**Saved Search ID:** HR\_Domain\_Classes  
**Description:** Active classes in the HR security domain

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

**Search All Locales:**  Yes  No

**Class Type:**  Item class type  Resource Block Type  Both

**Class ID:** Starts With ▼

**Item/Resource Block ID:** Starts With ▼

**Description:** Starts With ▼

**Title:** Starts With ▼

**Start Date After:** (d/M/yyyy)

**Start Date Before:** (d/M/yyyy)

**Status:**  Active  Not Active  Both

**Security Domains:** [1 Selected] ▼ ▼

**Add/Remove Criteria** →

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

- Click  .

## Searching for a class using a saved search (continued)

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

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

- 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.

**Class Search** Actions ▾

**Effective Communication for Leaders**  
79009

Start Date: 21/7/2025 08:30 am      Instructor: Ms Instructor      Enrolled: 0  
 End Date: 22/7/2025 04:30 pm      Location: Cambria Training Room (CAMB\_TRAIN)      Waitlisted: 0  
 Time Zone: South Africa Standard Time (Africa/Johannesburg)      Facility: Cambria House (CAMBRIA)      Open Seats: 20  
**CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)**      Virtual Class: No  
 Status: Active

⏪ ⏩

[Details](#)   [Email Notifications](#)   [Registrations](#)   [Seat Reservations](#)   [Agenda](#)   [Special Requests](#)   [Libraries](#)   [Contacts](#)   [+5 ▾](#)

**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone\*:       View Times in the Class Time Zone:  Yes  No

- 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.](#)

**Effective Communication for Leaders**
Actions ▾

79006

Start Date: 21/7/2025 08:30 am	Instructor: Ms Instructor	Enrolled: 0
End Date: 22/7/2025 04:30 pm	Location: Cambria Training Room (CAMB_TRAIN)	Waitlisted: 0
Time Zone: South Africa Standard Time (Africa/Johannesburg)	Facility: Cambria House (CAMBRIA)	Open Seats: 20
<b>CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)</b>	Virtual Class: No	
Status: Active		

⬆
✳

Details
Email Notifications
Registrations
Seat Reservations
Agenda
Special Requests
Libraries
Contacts
+5 ▾

**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone\*:

South Africa Standard Time (Africa/Johannesburg) ▾

View Times in the Class Time Zone:

Yes
  No

**General**

Description:

July 2025

- In the class menu, click *Registrations*.

3. The *Registrations* page appears.

Registrations (0)

Search

Add Users ▾

↑↓

[≡]

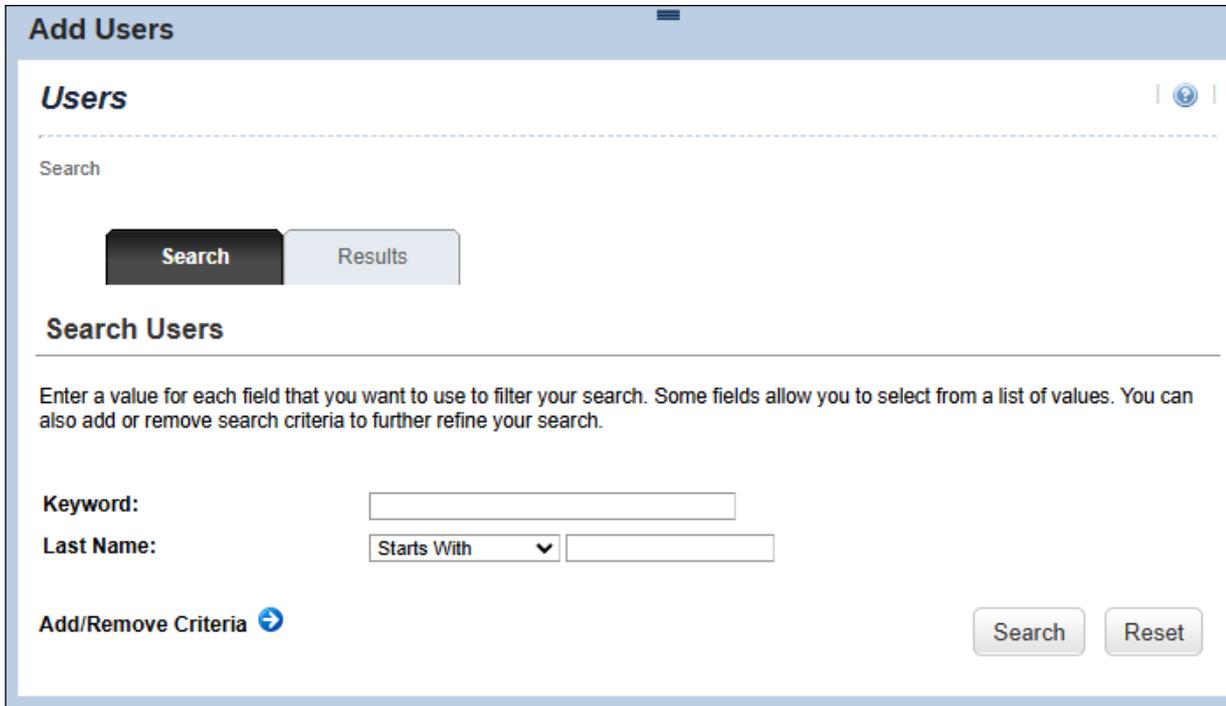
User ID	User Name	Organisation	Registration Status	Completion Status	Time Slot Attendance	Actions
There are no users registered for the class.						

- Click Add Users ▾.

## Registering or waitlisting learners for a class (continued)

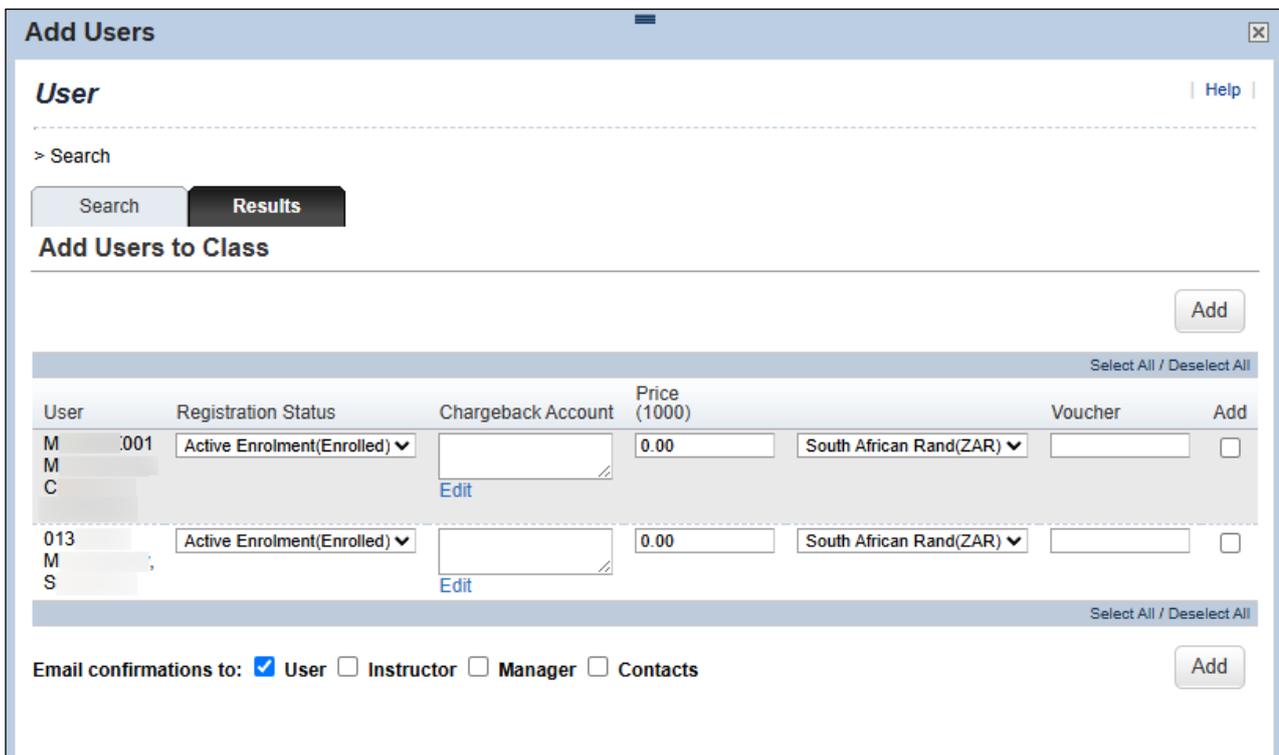
4. The *Add Users* dialogue box appears.

- 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 .

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



User	Registration Status	Chargeback Account	Price (1000)	Voucher	Add
M .001 M C	Active Enrolment(Enrolled) ▼	<input type="text"/>	0.00	South African Rand(ZAR) ▼	<input type="checkbox"/>
013 M S	Active Enrolment(Enrolled) ▼	<input type="text"/>	0.00	South African Rand(ZAR) ▼	<input type="checkbox"/>

- 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 .

**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  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  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  to proceed with the registration.

- If the **end date for registration changes has passed**, a warning message appears.

Click  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					
<b>Active Enrolment (3)</b>											
014	C	(Research Contracts & Innovation) Research Contracts & Innovation	Active Enrolment		0	... >					
014	L	(Coll of Accounting: Operations & Admin) Coll of Accounting: Operations & Admin	Active Enrolment		0	... >					
014	A	(BIO: Dept. of Biological Sciences) BIO: Dept. of Biological Sciences	Active Enrolment		0	... >					
<b>Waitlisted (1)</b>											
014	G	(ACDI: Operations Portfolio) ACDI: Operations Portfolio	Waitlisted		0	... >					

# Managing class registrations

## Procedure

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

**Effective Communication for Leaders**  
79006

Start Date: 21/7/2025 08:30 am  
End Date: 22/7/2025 04:30 pm  
Time Zone: South Africa Standard Time (Africa/Johannesburg)  
**CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)**  
Status: Active

Actions ▼

Instructor: Ms Instructor  
Location: Cambria Training Room (CAMB\_TRAIN)  
Facility: Cambria House (CAMBRIA)  
Virtual Class: No

Enrolled: 3  
Waitlisted: 1  
Open Seats: 7

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✎

[Details](#)   [Email Notifications](#)   [Registrations](#)   [Seat Reservations](#)   [Agenda](#)   [Special Requests](#)   [Libraries](#)   [Contacts](#)

+5 ▼

**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone\*:  
 ▼

View Times in the Class Time Zone:  
 Yes    No

**General**

Description:

- 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				
<b>Active Enrolment (2)</b>										
014		(ACDI: Operations Portfolio) ACDI: Operations Portfolio	Active Enrolment		0	...				>
014		(Research Contracts & Innovation) Research Contracts & Innovation	Active Enrolment		0	...				>
<b>Cancelled (1)</b>										
014		(FIN Payments & Reconciliations) FIN Payments & Reconciliations	Cancelled		0	...				>
<b>Pending (1)</b>										
014		(Coll of Accounting: Operations & Admin) Coll of Accounting: Operations & Admin	Pending		0	...				>
<b>Waitlisted (1)</b>										
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.

**Edit Registration**

<p>Name: <input type="text"/></p> <p>Organisation ID: (ACDI: Operations Portfolio) ACDI: Operations Portfolio</p> <p>Status Updated On: 3/6/2025 12:09 pm Africa/Johannesburg</p> <p>Reservation ID: -</p>	<p>User ID: 014</p> <p>Completion Status: -</p> <p>Time Slot Attendance: 0</p>
<p>Status: * <input type="text" value="Active Enrolment (ENROLL)"/></p>	<p>Time Zone: * <input type="text" value="South Africa Standard Time (Africa/Johannesb...)"/></p>
<p>Registration Change Date: * <input type="text" value="3/6/2025"/></p>	<p>Time (hh:mm AM/PM): * <input type="text" value="12:09 pm"/></p>

- 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 .
- **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.](#)

**Effective Communication for Leaders**
Actions ▾

79006

Start Date: 21/7/2025 08:30 am	Instructor: Ms Instructor	Enrolled: 3
End Date: 22/7/2025 04:30 pm	Location: Cambria Training Room (CAMB_TRAIN)	Waitlisted: 1
Time Zone: South Africa Standard Time (Africa/Johannesburg)	Facility: Cambria House (CAMBRIA)	Open Seats: 7
<b>CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)</b>	Virtual Class: No	
Status: Active		

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Details
Email Notifications
Registrations
Seat Reservations
Agenda
Special Requests
Libraries
Contacts
+5 ▾

**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone\*:

South Africa Standard Time (Africa/Johannesburg) ▾

View Times in the Class Time Zone:

Yes
  No

**General**

Description:

July 2025

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

3. The *Special Requests* page appears.

**Special Requests**

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**Edit Special Requests**

Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

Add / Remove Custom Fields
Print
Export

User ID	User Name	* Fund Number	* Cost Centre	* Email address of Fund Holder	Dietary Requirements	Food Allergies	Disability Accommodations Requirements
013		6		@uct.ac.za	None	N/A	Wheelchair access
014		1		@uct.ac.za	None	Tomatoes	N/A

- 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.](#)

**Effective Communication for Leaders**
Actions ▾

79006

Start Date: 21/7/2025 08:30 am	Instructor: Ms Instructor	Enrolled: 3
End Date: 22/7/2025 04:30 pm	Location: Cambria Training Room (CAMB_TRAIN)	Waitlisted: 1
Time Zone: South Africa Standard Time (Africa/Johannesburg)	Facility: Cambria House (CAMBRIA)	Open Seats: 7
<b>CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)</b>	Virtual Class: No	
Status: Active		

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⬇

Details
Email Notifications
Registrations
Seat Reservations
Agenda
Special Requests
Libraries
Contacts
+5 ▾

**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone\*:

South Africa Standard Time (Africa/Johannesburg) ▾

View Times in the Class Time Zone:

Yes
  No

**General**

Description:

July 2025

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

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

**Reports**

Please wait...

Report Title **Class Roster**

Status **Waiting in Queue**

Your report is in the queue and will start automatically as long as you do not close this page. (If you close the page, the report will be automatically cancelled.) If you do not wish to wait on this page for your report, you can choose one of the options below.

Cancel the Report

- 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
	*****		*****		
	*****		*****		
	*****		*****		
	*****		*****		

- 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.](#)

**Effective Communication for Leaders**  
79006

Start Date: 21/7/2025 08:30 am  
End Date: 22/7/2025 04:30 pm  
Time Zone: South Africa Standard Time (Africa/Johannesburg)  
**CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)**  
Status: Active

Instructor: Ms Instructor  
Location: Cambria Training Room (CAMB\_TRAIN)  
Facility: Cambria House (CAMBRIA)  
Virtual Class: No

Enrolled: 3  
Waitlisted: 1  
Open Seats: 7

Actions ▼

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⏩

**Details** | Email Notifications | Registrations | **Seat Reservations** | Agenda | Special Requests | Libraries | Contacts

+5 ▼

**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone\*:  
 ▼

View Times in the Class Time Zone:  
 Yes  No

**General**

Description:

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

3. The *Seat Reservations* page appears.

Seat Reservations (0)

+ ✎ ✕ ↕

User Group ID	Organisation ID	Reservation ID	Chargeback Account	Reserved Seats	Reserved Seats Filled	Price Per Reserved Seat	Currency
There are no reserved seats associated with this class.							

- Click + *Add*.

## Creating a block booking / seat reservation (continued)

4. The *Reserve Seats* dialogue box appears.

**Reserve Seats**

Reserve for:  Organisation  User Group

Organisation:\*

User Group:\*

Reserved Seats:\*

Reserve Date:\*

Time:\*  South Africa Standard Time (A...

Price Per Reserved Seat:\*  South African Rand (ZAR)

Chargeback Account(s):

**Save** **Cancel**

- In the *Organisation* field, click

5. The *Organisations* dialogue box appears.

**Organisations**

Search

**Search** **Results**

**Search Organisations**

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

Organisation ID:

Description:

Organisation Type:

Organisation Group:

**Add/Remove Criteria**

**Search** **Reset**

- 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

## 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.

**Reserve Seats**

Reserve for:  Organisation  User Group

Organisation: \* Dept. of Commercial Law (Dept. of Commercial Law)

User Group: \*

Reserved Seats: \* 1

Reserve Date: \* 3/6/2025

Time: \* 02:09 pm South Africa Standard Time (A...)

Price Per Reserved Seat: \* 0.00 South African Rand (ZAR)

Chargeback Account(s):

Save Cancel

- 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.

Seat Reservations (1)								+   
<input type="checkbox"/>	User Group ID	Organisation ID	Reservation ID	Chargeback Account	Reserved Seats	Reserved Seats Filled	Price Per Reserved Seat	Currency
<input type="checkbox"/>		Dept. of Commercial Law	12000		2	0	0.00	South African Rand (ZAR)
Voucher:		Reserve Date: 3/6/2025	Time: 02:09 pm	Time Zone: South Africa Standard Time (Africa/Johannesburg)		Comments:		

- To make changes to the reservation or add *Comments* (e.g. contact person or email address), click  *Edit*. When changes are complete, click .
- 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).

Effective Communication for Leaders							Actions 
64000							
	Instructor-Led	Status: Active	★★★★★ (0)				
	Course (CRSE)	Cover Page: Inactive					
	Revision/Date: Version 1, 28/5/2025						
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Item Details</span> <span>Email Notifications</span> <span>Online Content</span> <span>Agenda Template</span> <span style="border-bottom: 1px solid black;">Classes</span> <span>Request Reasons</span> <span>Class Requests</span> <span>Libraries</span> <span style="border: 1px solid gray; border-radius: 15px; padding: 2px 5px;">+14 </span> </div>							
Classes (2)							 
ID	Start Date	End Date	Time Zone	Number Enrolled	Maximum Enrolments	Enrolment Status	
79006	21/7/2025 08:30 am	22/7/2025 04:30 pm	Africa/Johannesburg	6	10		
Primary Location: Cambria Training Room							
79007	4/8/2025 09:00 am	5/8/2025 05:00 pm	Africa/Johannesburg	10	10	Full	
Primary Location:							

# Removing a block booking / seat reservation

## Procedure

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

**Effective Communication for Leaders** Actions ▾  
79006

Start Date: 21/7/2025 08:30 am	Instructor: Ms Instructor	Enrolled: 3
End Date: 22/7/2025 04:30 pm	Location: Cambria Training Room (CAMB_TRAIN)	Waitlisted: 1
Time Zone: South Africa Standard Time (Africa/Johannesburg)	Facility: Cambria House (CAMBRIA)	Open Seats: 7

**CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)**  
Virtual Class: No  
Status: Active

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[Details](#) | [Email Notifications](#) | [Registrations](#) | [Seat Reservations](#) | [Agenda](#) | [Special Requests](#) | [Libraries](#) | [Contacts](#) +5 ▾

**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone\*: South Africa Standard Time (Africa/Johannesburg) ▾ View Times in the Class Time Zone:

Yes  No

**General**

Description:  
July 2025

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

3. The *Seat Reservations* page appears.

Seat Reservations (1) <span style="float: right;">+ ✎ ✕ ⬆️</span>								
<input type="checkbox"/>	User Group ID	Organisation ID	Reservation ID	Chargeback Account	Reserved Seats	Reserved Seats Filled	Price Per Reserved Seat	Currency
<input type="checkbox"/>		Dept. of Commercial Law	12000		2	0	0.00	South African Rand (ZAR)
Voucher:		Reserve Date:	Time:	Time Zone:		Comments:		
		3/6/2025	02:09 pm	South Africa Standard Time (Africa/Johannesburg)		Contact person: Dumisani on x1234		

- 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.

**⚠️ Class Refund for Reserved Seats**

The following refunds will be issued if you remove this reserved seat registration:

1) Reservation ID 12000 (2 reserved) refund amount 0.00 ZAR

Do you wish to continue?

Yes
No

- Click Yes.

## Removing a block booking / seat reservation (continued)

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

Seat Reservations (0) + ✎ ✕ ↕

User Group ID	Organisation ID	Reservation ID	Chargeback Account	Reserved Seats	Reserved Seats Filled	Price Per Reserved Seat	Currency
There are no reserved seats associated with this class.							

1 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.](#)

**Effective Communication for Leaders**
Actions

79006

Start Date: 21/7/2025 08:30 am

End Date: 22/7/2025 04:30 pm

Time Zone: South Africa Standard Time (Africa/Johannesburg)

**CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)**

Status: Active

Instructor: Ms Instructor

Location: Cambria Training Room (CAMB\_TRAIN)

Facility: Cambria House (CAMBRIA)

Virtual Class: No

Enrolled: 3

Waitlisted: 1

Open Seats: 7

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Details
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**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone \*:

South Africa Standard Time (Africa/Johannesburg)

View Times in the Class Time Zone:

Yes  No

**General**

Description:

July 2025

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

3. The *Agenda* page appears.

Agenda							+	
<input type="checkbox"/>	Title	Primary Location	Primary Instructor	Time Slot Description	Conflict Item	Virtual		
<input type="checkbox"/>	▼ Mon 21/7/2025							
<input type="checkbox"/>	08:30 am - 04:30 pm	Cambria Training Room	Ms Instructor					...
<input type="checkbox"/>	▼ Tue 22/7/2025							
<input type="checkbox"/>	08:30 am - 12:00 pm	Cambria Training Room	Ms Instructor	Morning session				...
<input type="checkbox"/>	01:00 pm - 04:30 pm	Cambria Training Room	Ms Instructor	Afternoon session				...

- 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.

**Edit Time Slot**

Description

Start Date\*

Start Time\*

End Date\*

End Time\*

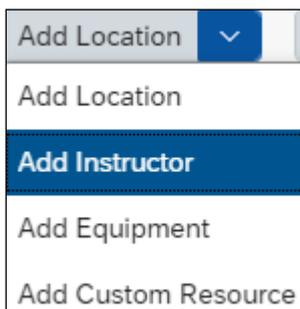
Time Zone\*

Virtual  
 OFF

**Resources** Add Location  Apply to All Time Slots

Resource Type & Resource	Primary	Delete
<b>Locations</b>		
TRAIN - Cambria Training Room	<input checked="" type="radio"/>	<input type="checkbox"/>
<b>Instructors</b>		
Ms Instructor	<input checked="" type="radio"/>	<input type="checkbox"/>

- 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.

**Instructors**

> Search Results

Search Results

View Instructors Results

Add Reset

Records per Page: 50 Page: 1 2 «Previous Next» (54 total records) Page 1 of 2 Go Select All / Deselect All

Instructor ID	Name of Training Provider / Learning Institution	Related User	Availability
014		014	Available for Entire Class <input type="checkbox"/>
013		013	Available for Entire Class <input type="checkbox"/>

- 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.

Resources

Add Instructor Apply to All Time Slots

Resource Type & Resource	Primary	Delete
<b>Locations</b>		
TRAIN - Cambria Training Room	<input checked="" type="radio"/>	<input type="checkbox"/>
<b>Instructors</b>		
New Instructor, Ms	<input type="radio"/>	<input type="checkbox"/>
Ms Instructor	<input checked="" type="radio"/>	<input type="checkbox"/>

Save Cancel

- Set the new instructor as the *Primary* instructor using the radio button.

- Delete the previous instructor by selecting the *Delete* check box.

Resource Type & Resource	Primary	Delete
<b>Locations</b>		
TRAIN - Cambria Training Room	<input checked="" type="radio"/>	<input type="checkbox"/>
<b>Instructors</b>		
New Instructor, Ms	<input checked="" type="radio"/>	<input type="checkbox"/>
Ms Instructor	<input type="radio"/>	<input checked="" type="checkbox"/>

- Click **Save**.

## Changing a class instructor (continued)

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

Agenda							+	⊗
<input type="checkbox"/>	Title	Primary Location	Primary Instructor	Time Slot Description	Conflict Item	Virtual		
<input type="checkbox"/>	▼ Mon 21/7/2025							
<input type="checkbox"/>	08:30 am - 04:30 pm	Cambria Training Room	Ms Instructor					⋮
<input type="checkbox"/>	▼ Tue 22/7/2025							
<input type="checkbox"/>	08:30 am - 12:00 pm	Cambria Training Room	Ms New Instructor	Morning session				⋮
<input type="checkbox"/>	01:00 pm - 04:30 pm	Cambria Training Room	Ms Instructor	Afternoon session				⋮

Changes 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.](#)

**Effective Communication for Leaders**

79010

Actions ▼

Start Date: 5/5/2025 08:30 am	Instructor: Ms Instructor	Enrolled: 4
End Date: 6/5/2025 04:30 pm	Location: Cambria Training Room (CAMB_TRAIN)	Waitlisted: 0
Time Zone: South Africa Standard Time (Africa/Johannesburg)	Facility: Cambria House (CAMBRIA)	Open Seats: 6
<b>CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)</b>	Virtual Class: No	
Status: Active		

⬆
✳

---

Details
Email Notifications
Registrations
Seat Reservations
Agenda
Special Requests
Libraries
Contacts

+5 ▼

**Time Zone**

All times are shown in your preferred time zone.

Class Time Zone\*:

South Africa Standard Time (Africa/Johannesburg) ▼

View Times in the Class Time Zone:

Yes  No

**General**

Description:

May 2025

- 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.

**Add to Learning History**

*Add Learning History with Finance* [Help](#)

> Step 1 > Step 2 > Step 3 > Step 4

**Step 4: Select Users**

Previous Next

\* = Required Fields

**Add Users**

Enter User ID or [add one or more from list](#)

\* User ID:

**Edit Selected Users**

Apply Changes

User ID	Name ▲	Remove
01	D	<input type="checkbox"/>
01	H	<input type="checkbox"/>
01	S	<input type="checkbox"/>
01	T	<input type="checkbox"/>

Apply Changes

- If any learners should be removed (and therefore not have the learning recorded), select the appropriate checkbox in the *Remove* column and click .

- To proceed with recording the learning for the listed learners, click .

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

**Add to Learning History**

*Add Learning History with Finance* [Help](#)

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

**Step 5: Edit User Event Information**

Previous Next

Apply Default Status:

User	Comments	Grade	Time Slot Attendance	Status
01 (D)	<input type="text"/>	<input type="text"/>	0/3	<input type="text"/>
01 (H)	<input type="text"/>	<input type="text"/>	0/3	<input type="text"/>
01 (S)	<input type="text"/>	<input type="text"/>	0/3	<input type="text"/>
01 (T)	<input type="text"/>	<input type="text"/>	0/3	<input type="text"/>

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

- Click .

# Recording learning after a completed class (continued)

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

**Add to Learning History**

*Add Learning History with Finance* | Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6

**Step 6: Edit User Event Financial Information**

Previous Next

The amount and method of payment for events paid for by the user are displayed below. Prices paid by account code can be modified. For events not previously paid for by the user, the amount to charge will inherit from the default price, and the authorised account code of the user will prepopulate.

User	Price (1000)	Currency	Cost Centre Account Codes / Payment Method	Profit Centre Account Codes	Voucher
01 (D)	0.00	ZAR (South African Rand)			
01 (H)	0.00	ZAR (South African Rand)			
01 (S)	0.00	ZAR (South African Rand)			
01 (T)	0.00	ZAR (South African Rand)			

- Click 

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

**Add to Learning History**

*Add Learning History with Finance* | Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6 > Step 7

**Step 7: Record Event**

Previous Finish

**Class ID:** 79010  
**Item:** CRSE 64000 (Rev 1 - 28/5/2025 12:53 PM Africa/Johannesburg)  
**Item Title:** Effective Communication for Leaders  
**Instructor:** Instructor, Ms  
**Completion Date:** 6/5/2025 04:30 PM Africa/Johannesburg      **Total Hours:** 15.00      **Default Tuition:** 0.00  
**Contact Hours:**      **CPD:**      **Credit Hours:**  
**Automatically Assess Related Competencies:**

User	Status	Grade	Price	Cost Centre Account Codes / Payment Method	Profit Centre Account Codes	Voucher
01 (C)	CRSE_ATT (Attended)		0.00 ZAR			
01 (D)	CRSE_ATT (Attended)		0.00 ZAR			
01 (J)	CRSE_ATT (Attended)		0.00 ZAR			
01 (J)	CRSE_ATT (Attended)		0.00 ZAR			

- Click 

## Recording learning after a completed class (continued)

- A system dialogue box appears.

This action may take more than a few seconds. Please wait for the page to be refreshed.

OK

OK

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

### Add to Learning History

---

**Finished**

**Status:**

- The history record has been successfully added.

---

**Generate Completion Certificates**

Learning history records that provide credits have been successfully added for the following User(s).

User ID	Name
01	C
01	D
01	J
01	J

---

**Further Actions**

The class can be closed after a learning history record is added for all users.

**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  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.
- The *Registrations* page appears.

Registrations (2)							Search <input type="text"/>	Add Users <input type="button" value="v"/>	↑↓	[≡]
User ID	User Name	Organisation	Registration Status	Completion Status	Time Slot Attendance	Actions				
<b>Active Enrolment (2)</b>										
01	C	(Research Contracts & Innovation) Research Contracts & Innovation	Active Enrolment	(CRSE_ATT) Attended	0	... >				
01	L	(Coll of Accounting: Operations & Admin) Coll of Accounting: Operations & Admin	Active Enrolment		0	... >				

- 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.](#)

Effective Communication for Leaders  
79005
Actions ▾

Start Date: 21/7/2025 09:00 am	Instructor: Ms Instructor	Enrolled: 1
End Date: 22/7/2025 05:00 pm	Location: Cambria Training Room (CAMB_TRAIN)	Waitlisted: 0
Time Zone: South Africa Standard Time (Africa/Johannesburg)	Facility: Cambria House (CAMBRIA)	Open Seats: Unlimited
<b>CRSE 64000 (Rev 1 - 28/5/2025 12:53 pm)</b>	Virtual Class: No	
Status: Active		

⏪ ⏩

Details
Email Notifications
Registrations
Seat Reservations
Agenda
Special Requests
Libraries
Contacts
+5 ▾

Time Zone

All times are shown in your preferred time zone.

Class Time Zone\*:

South Africa Standard Time (Africa/Jo... ▾

View Times in the Class Time Zone:

Yes
  No

General

Description:

July 2025

Contact Name:

hr-stafflearningcentre@uct.ac.za

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

3. The *Cancel* dialogue box appears.

**Cancel**

### Cancel Class | Help |

---

> Step 1

**Step 1: Select Class to Cancel**

Next

**\* = Required Fields**

\* Class:

\* Cancellation Date:   
(d/M/yyyy)

- Click Next.

## Cancel Class (continued)

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

**Cancel**

**Cancel Class** | Help

> Step 1 > Step 2

**Step 2: Edit Realised Costs**

Previous Next

**Realised Costs**

Change the realised costs and click **Update Total** to recalculate total costs or override the realised costs by entering a new **Class Total**. Click **Reset** to revert to original values. Click **Next** to continue the Class Cancellation process.

Update Total Reset

⊕ **Class Total:** 0.00 South African Rand (ZAR)  
(1000)

Update Total Reset

- Click 

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

**Cancel**

**Cancel Class** | Help

> Step 1 > Step 2 > Step 3

**Step 3: Post Cancellation Action Settings**

Previous Next

Add enrolled, waitlisted and pending Users to the request list for this item

Send Email Notification to User

Send Email Notification to Manager

Send Email Notification to Instructor

Send Email Notification to Contacts

Inactivate the Class

- 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 

## labelling="Section-Header">Cancelling a class (continued)

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

**Cancel**

**Cancel Class** | Help |

---

> Step 1 > Step 2 > Step 3 > Step 4

**Step 4: Confirm**

Previous Finish

Class ID: 79005  
 Class Total : 0.0 South African Rand (ZAR)

Request Item For Users: No  
 Notify Users: No  
 Notify Managers: No  
 Notify Instructors: No  
 Notify Contacts: No  
 Inactivate the Class: Yes

- Click  .

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

**Cancel**

**Cancel Class** | Help |

---

**Finished**

**Status:**

- The class has been successfully cancelled.

OK

- Click  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](#).

The screenshot shows the 'Effective Communication for Leaders' class page. At the top, the class name and ID (79010) are displayed, along with an 'Actions' menu. Below this, key details are listed: Start Date (5/5/2025 08:30 am), End Date (6/5/2025 04:30 pm), Time Zone (South Africa Standard Time), Instructor (Ms Instructor), Location (Cambria Training Room), Facility (Cambria House), and Status (Active). A navigation bar includes tabs for Details, Email Notifications, Registrations, Seat Reservations, Agenda, Special Requests, Libraries, and Contacts. The 'Time Zone' section is expanded, showing a dropdown menu set to 'South Africa Standard Time (Africa/Johannesburg)' and radio buttons for 'View Times in the Class Time Zone' (Yes/No). The 'General' section shows a description of 'May 2025'.

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

3. The *Close* dialogue box appears.

The screenshot shows the 'Close Class' dialog box. It has a title bar 'Close' and a subtitle 'Close Class' with a 'Help' link. The progress indicator shows '> Step 1'. The main heading is 'Step 1: Select Class to Close'. A 'Next' button is located on the right. Below this, a legend indicates '\* = Required Fields'. Two input fields are shown: '\* Class:' with a search icon and the value '79010', and '\* Closing Date:' with a calendar icon and the value '3/6/2025'.

- Click .

## Closing a class (continued)

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

**Close**

**Close Class** | Help |

> Step 1 > Step 2

**Step 2: Edit Realised Costs**

Previous Next

**Realised Costs**

Change the realised costs and click **Update Total** to recalculate total costs or override the realised costs by entering a new **Class Total**. Click **Reset** to revert to original values. Click **Next** to continue the Class Closing process.

Update Total Reset

Class Total : 0.00 South African  
(1000) Rand (ZAR)

Update Total Reset

- 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](#).

**Warning Details:**

- A history record has not been added to learning history for all Enrolled Users.

- Click **Next**.

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

**Close**

**Close Class** | Help |

> Step 1 > Step 2 > Step 3

**Step 3: Confirm**

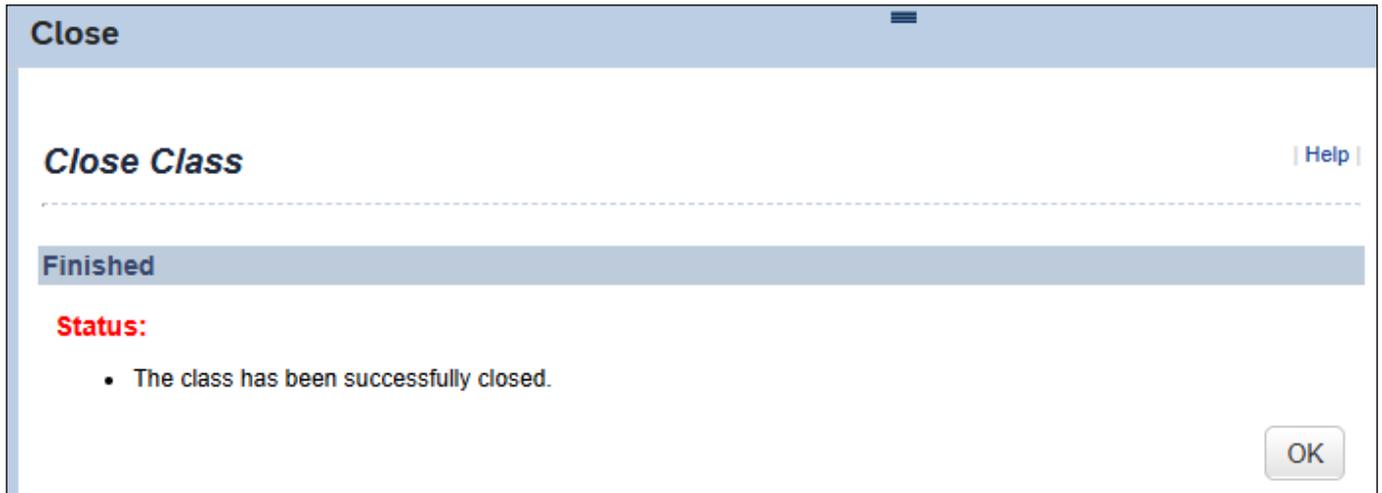
Previous Finish

Class ID: 79010  
Class Total: 0.00 South African Rand (ZAR)

- Click **Finish**.

## Closing a class (continued)

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



- Click  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](#).

The screenshot shows the course details for 'Effective Communication for Leaders' (ID: 64000). The course is 'Instructor-Led', 'Status: Active', and 'Cover Page: Inactive'. It has a rating of 5 stars (0 reviews) and a revision date of 28/5/2025. The page includes tabs for 'Item Details', 'Email Notifications', 'Online Content', 'Agenda Template', 'Classes', 'Request Reasons', and 'Class Requests'. The 'Course Overview' section shows the title 'Effective Communication for Leaders' in a text box with a 265-character limit.

- In the *Actions* menu (top right), choose *Assign*.
3. The *Assign* dialogue box appears.

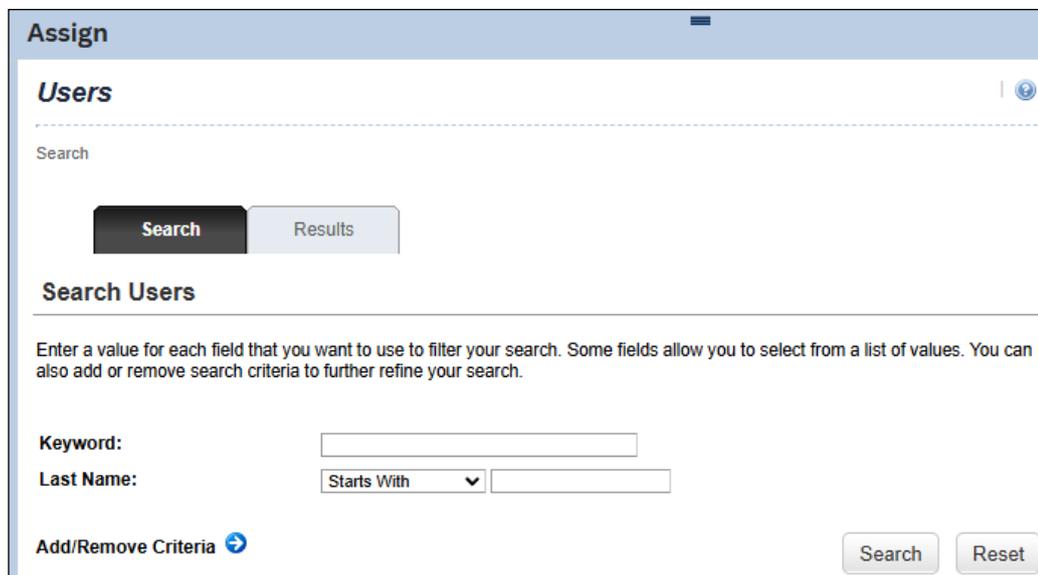
The screenshot shows the 'Assign' dialog box, specifically 'Step 2: Select Users'. It includes a 'Next' button and a section for 'Add Users' with a text input field for '\* User ID:' and an 'Add' button. A message at the bottom states: 'There are no Users in the list. Please add Users before proceeding.'

- In the *Add Users* section, click [add one or more from list](#).

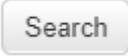
## Assigning an item to a learner (continued)

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

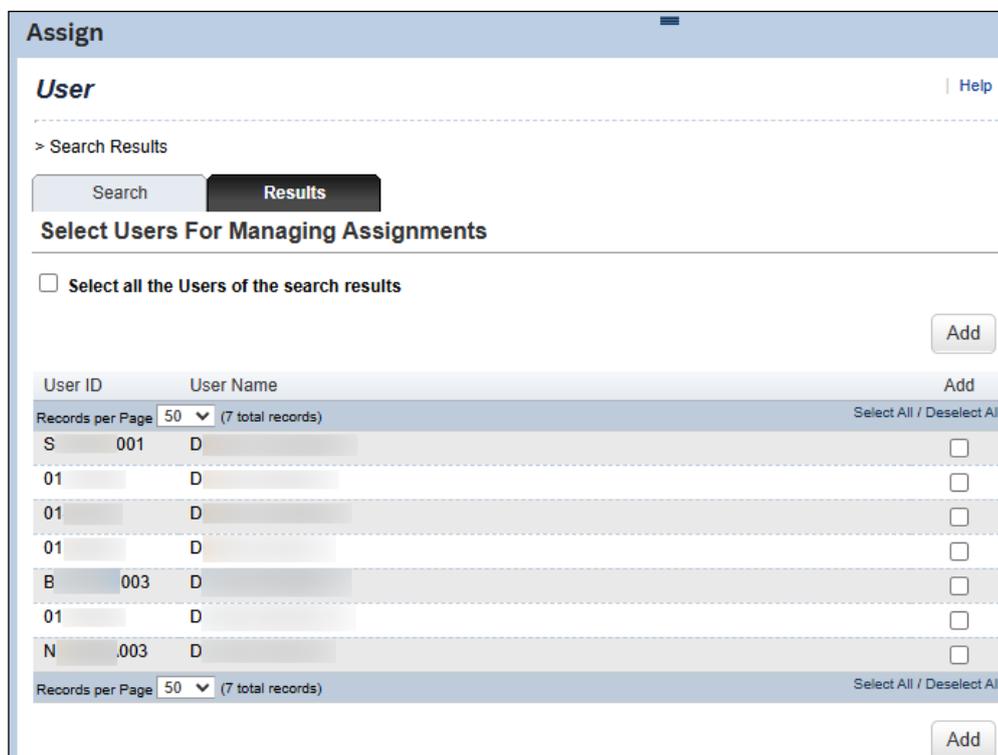
- Click **Add/Remove Criteria**  to add additional search criteria, e.g. *Last Name*, *User ID* for the staff number. **Note:** The *Keyword* field can be used to search for users but produces a less organised list when searching for a common last name.



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

- Click .

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



User ID	User Name	Add
S 001	D	<input checked="" type="checkbox"/>
01	D	<input type="checkbox"/>
01	D	<input type="checkbox"/>
01	D	<input type="checkbox"/>
B 003	D	<input type="checkbox"/>
01	D	<input type="checkbox"/>
N .003	D	<input type="checkbox"/>

- 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 .

## Assigning an item to a learner (continued)

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

**Assign**

**Manage Assignments** | Help

> Step 1 > Step 2

**Step 2: Select Users**

Next

\* = Required Fields

**Add Users**

Enter User ID or add one or more from list.

\* User ID:

Add

**Edit Users**

Apply Changes

Select All / Deselect All

User ID	Name	Remove
01	D	<input type="checkbox"/>

Select All / Deselect All

Apply Changes

- To add another learner, repeat from step 3.

- When all learners have been added, click .

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

**Assign**

**Manage Assignments** | Help

> Step 1 > Step 2 > Step 3

**Step 3: Adding Items**

Previous Next

\* = Required Fields

**Select Items for Adding**

Enter 'Item ID' and 'Item Type' or add one or more from list.

\* Type:

\* ID:

Add

**Edit the List of Items for Adding**

Apply Changes

Select All / Deselect All

Item	Title	Assign. Type	Assign Date	Remove
CRSE 64000 (Rev 1 - 28/5/2025 12:53 PM Africa/Johannesburg)	Effective Communication for Leaders	OPT	3/6/2025	<input type="checkbox"/>

Select All / Deselect All

Apply Changes

- Click .

## Assigning an item to a learner (continued)

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

**Assign**

**Manage Assignments** | Help

> Step 1 > Step 2 > Step 3 > Step 4

**Step 4: Edit Item Information**

Previous Next

Item	Title	Assign. Type	Assign Date (d/M/yyyy)
CRSE 64000 (Rev 28/5/2025 12:53 PM Africa/Johannesburg)	Effective Communication for Leaders	Optional (OPT)	3/6/2025

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

- Click  .

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

**Assign**

**Manage Assignments** | Help

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

**Step 5: Complete Managing Assignments**

Previous Run Job Now Schedule Job

User ID	Name
01	D

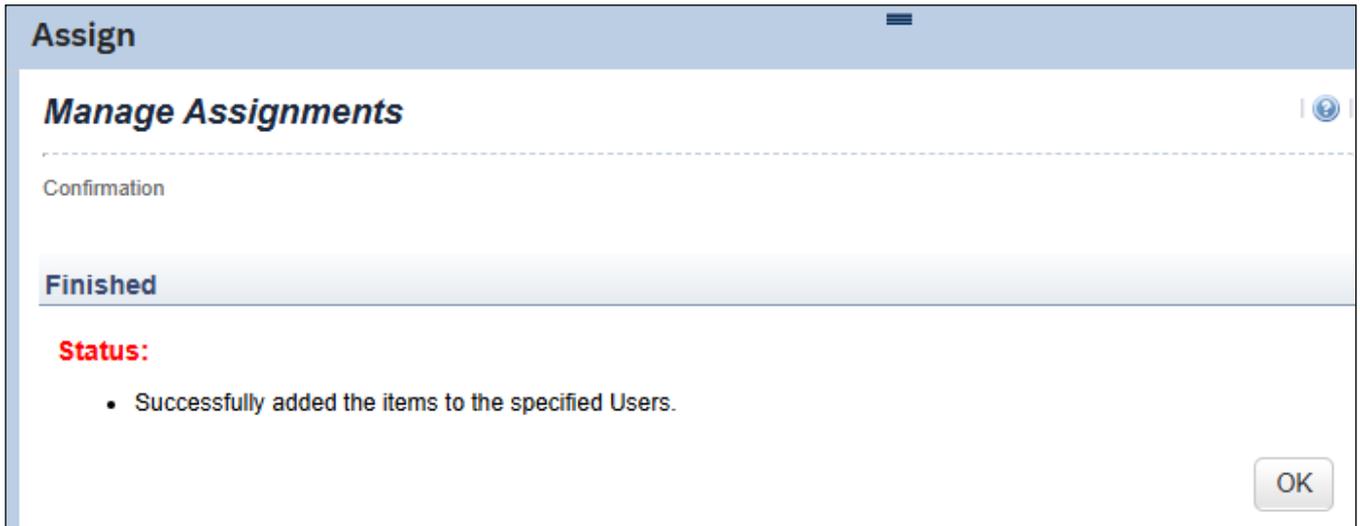
Item	Title	Assign. Type	Assign Date	Required Date (d/M/yyyy)
CRSE 64000 (Rev 28/5/2025 12:53 PM Africa/Johannesburg)	Effective Communication for Leaders	OPT	3/6/2025	

- If applicable, enter the *Required Date*.

- Click  .

## 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).

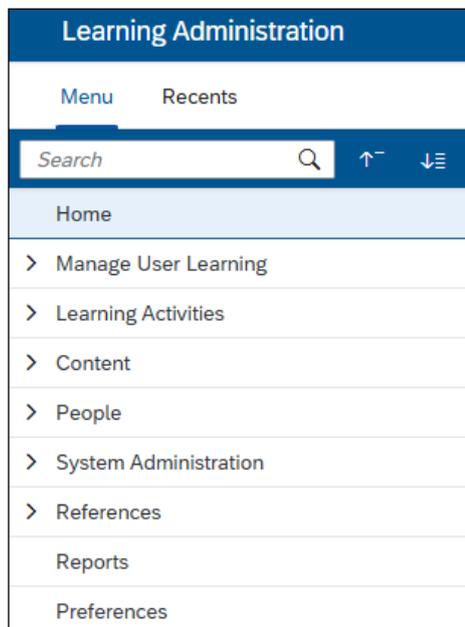
# Removing an assigned item from a learner

## Background

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

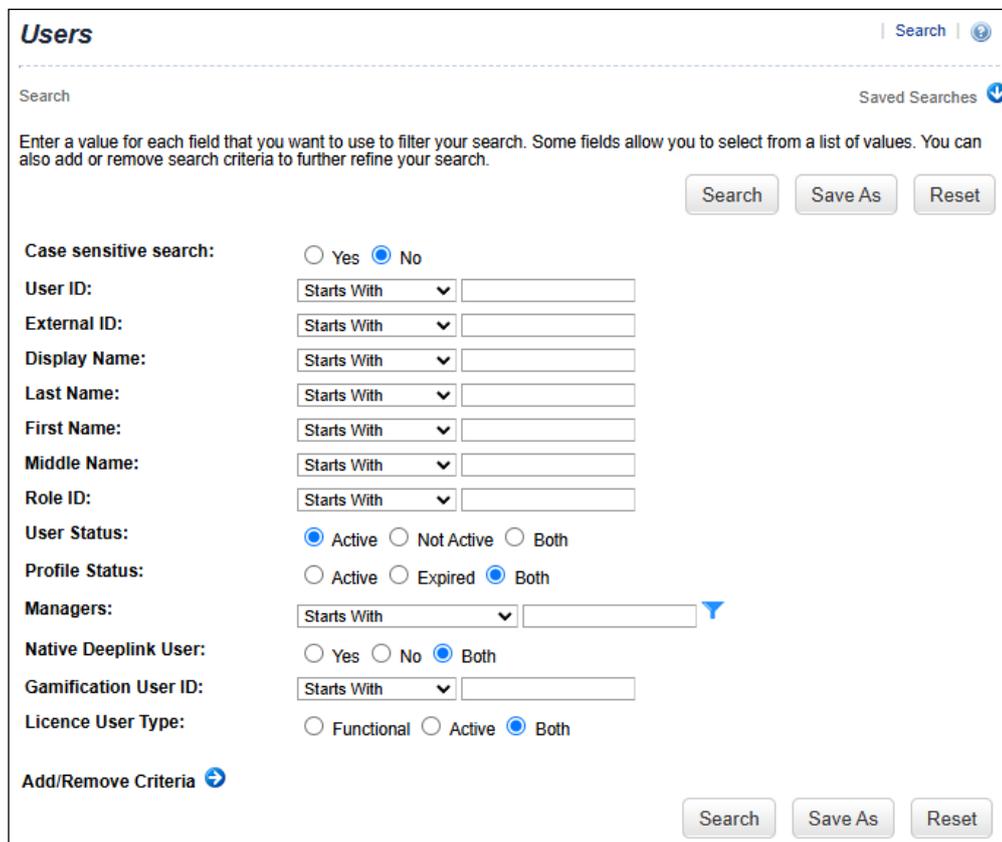
## Procedure

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 .

## Removing an assigned item from a learner (continued)

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

User ID	User Name	Notify
S 001	D [redacted]	<input type="checkbox"/>
01	D [redacted]	<input type="checkbox"/>
01	D [redacted]	<input type="checkbox"/>
01	D [redacted]	<input type="checkbox"/>
B 1003	D [redacted]	<input type="checkbox"/>
01	D [redacted]	<input type="checkbox"/>
N 003	D [redacted]	<input type="checkbox"/>

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

4. The *User Details* page appears.

User Search: H 01

41001070      Manager: N [redacted]      Status: Active

[redacted]@UCT.AC.ZA

Cape Town

Navigation: User Details | Assigned Items | Curricula | Programmes | Registration | Content Status | Completed Items | Surveys (+8)

Information: Certain fields on the page are read-only because they contain HR data and should be maintained in your core HR system of record. If you wish to make updates to these fields, please do so in the SAP SuccessFactors application. As an alternative, you can use the Learning data import tool to make these updates.

Personal Information

First Name: H      Middle Name: [redacted]      Last Name: D

Country/Region: South Africa (South Africa)      Email Address: [redacted]@UCT.AC.ZA

- 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)											Search	+	✎	↕	▼	
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		19/5/2025	31/12/2025	211	Required		Manager Assigned			...	>				
64000	Effective Communication for Leaders		3/6/2025			Optional		Directly Assigned			...	>				
56004	Memory Skills		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)											Search	+	✎	↕	▼	
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		19/5/2025	31/12/2025	211	Required		Manager Assigned			...	>				
56004	Memory Skills		22/5/2025					Self-Assigned			...	>				

1 row was removed.

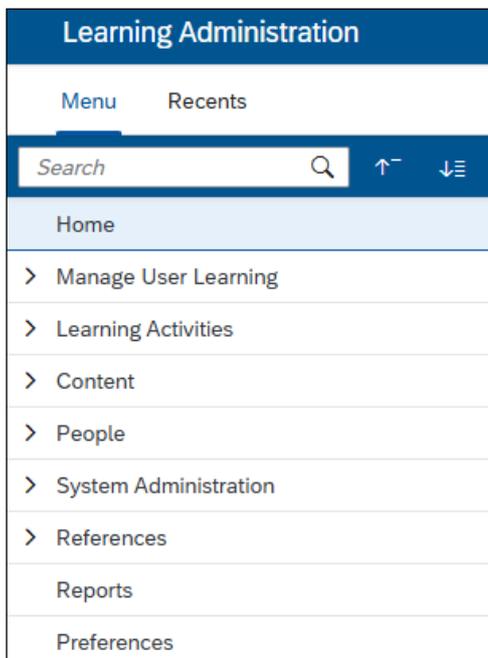
# Running reports

## 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.

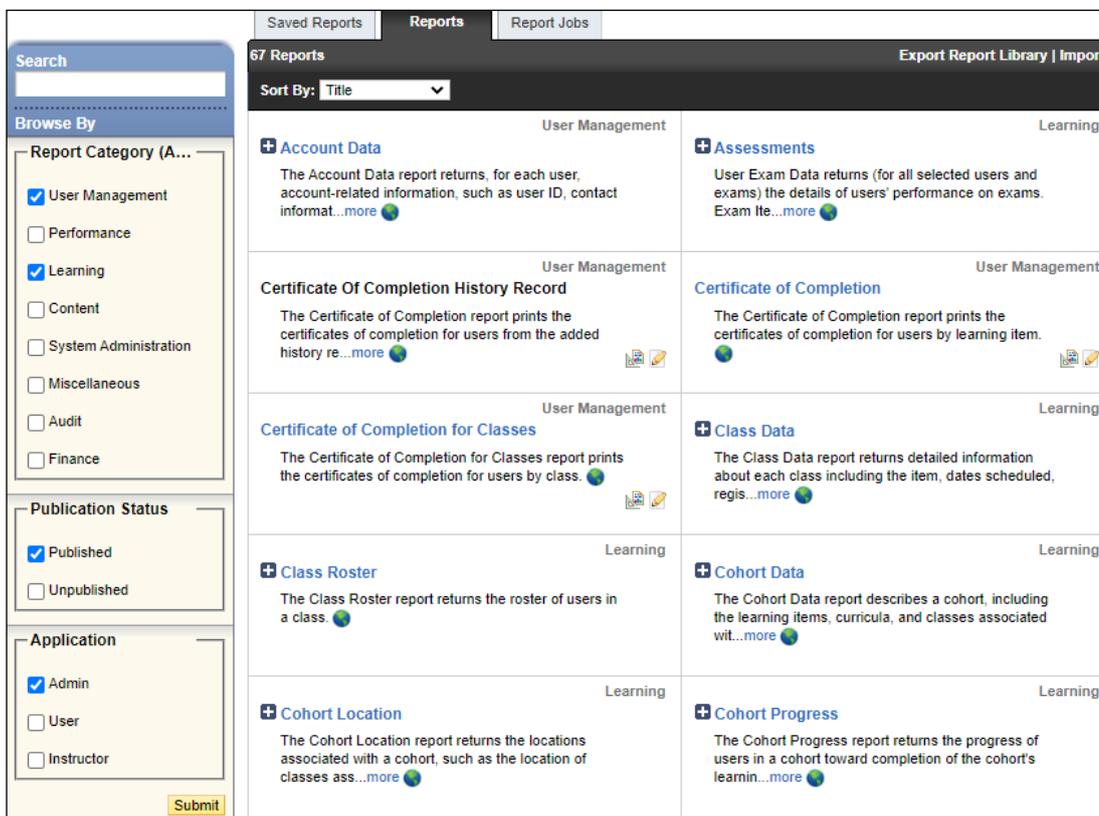
## Procedure

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.

**Learning**

 **Learning Calendar**

Learning Calendar  

Learning Calendar (CSV)  

The Learning Calendar report returns all the daily classes or resource blocks scheduled between two dates. 

- 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.

**Learning Calendar** | Browse | Help |

---

> Run Report

**Run Learning Calendar**

---

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

---

Page Break Between Records

Case sensitive search:  Yes  No

Date Range From:

Date Range To:

Item:  Type:  ID:

Resource Block Type:

Primary Location:

Manage Equipment:

Facility:

Instructor:

Class Type:  Item  Resource Block  Both

Show Only:  Active Classes  Inactive Classes  Both

Cancelled:  Yes  No  Both

Sort By:  Item/Resource Block  Class ID  Start Date

Display:  By Class  By Time Slot

**Learning Calendar (CSV)** | Browse | Help |

---

> Run Report

**Run Learning Calendar (CSV)**

---

Report Destination:

Report Format:

CSV Report Delimiter:

---

Case sensitive search:  Yes  No

Date Range From:

Date Range To:

Item:  Type:  ID:

Resource Block Type:

Primary Location:

Manage Equipment:

Facility:

Instructor:

Class Type:  Item  Resource Block  Both

Show Only:  Active Classes  Inactive Classes  Both

Cancelled:  Yes  No  Both

- 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)

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

Reports

Please wait...

Report Title **Learning Calendar**

Status **Waiting in Queue**

Your report is in the queue and will start automatically as long as you do not close this page. (If you close the page, the report will be automatically cancelled.) If you do not wish to wait on this page for your report, you can choose one of the options below.

- 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.