



User Guide | PUBLIC

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SuccessFactors Learning User Help

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1 Getting Started

SAP SuccessFactors Learning keeps track of your courses for you: courses you have been assigned, courses you have begun, and courses you have completed. You get started by understanding how the courses were assigned to you, how you can begin them, and how to track your completion status.

The [Learning Assignments](#) tile is the hub of the SAP SuccessFactors Learning assignment and completion process. Whether you assign yourself learning or someone in your organization assigns you learning, the assignment appears on [Learning Assignments](#) tile. Your role in the learning process is to complete your assignments and move them to the [History](#) tile.

The other tiles and tabs support the assignment and completion process:

- [My Curricula](#): A curriculum is a group of courses that fit together to define a learning goal. The My Curricula tab tracks your progress through your curricula and provides details about the group of courses.
- [Classes](#): The [Classes](#) tile contains courses that are near you, starting soon, and required for one of your curricula. If your organization enables it, you can use it as a shortcut to finding courses.
- [Links](#): The [Links](#) tile contains links to pages that support the assignment and completion process. The pages manage approvals, reports, purchases, and other supporting processes.
- [Recommendations](#): A recommendation is a learning opportunity that someone thinks would interest you. Recommendations aren't assignments, but you can add them to your assignments.

[Tips for Success \[page 5\]](#)

Use this information to meet your goals in SAP SuccessFactors Learning: to complete your learning assignments on time and to find enrichment courses.

[What you can do with SAP SuccessFactors Learning \[page 5\]](#)

Use this information to navigate the [Home](#) tab and find the help you need to work in SAP SuccessFactors Learning.

[Home Tab Tiles \[page 6\]](#)

View this section if you want to know about [Home](#) tab tiles.

[Using the My Employees Tab \[page 7\]](#)

Use this information to navigate the [Home](#) tab and find the help you need to work in SAP SuccessFactors Learning.

[Selecting a Localized Page for Unauthenticated Users \[page 8\]](#)

If you are not yet logged in, however, you must tell the system your language.

1.1 Tips for Success

Use this information to meet your goals in SAP SuccessFactors Learning: to complete your learning assignments on time and to find enrichment courses.

Your primary goal is to complete all your required learning assignments by their due date and your secondary goal is to assign yourself optional courses that add to your skills and knowledge to help you in your current job or to advance your career. To meet your goals, use these tips:

- Watch for email messages from SAP SuccessFactors Learning about changes in your [My Learning Assignments](#) tile.
- In the [My Learning Assignments](#) tile, start working on the course with the earliest due date.
- Launch online learning and online meetings directly from the assignments list.

Parent topic: [Getting Started \[page 4\]](#)

Related Information

[What you can do with SAP SuccessFactors Learning \[page 5\]](#)

[Home Tab Tiles \[page 6\]](#)

[Using the My Employees Tab \[page 7\]](#)

[Selecting a Localized Page for Unauthenticated Users \[page 8\]](#)

[Learning Assignments and Learning History \[page 30\]](#)

[People who can Assign Courses to You \[page 31\]](#)

[The Things That can Appear on Your Assignments List \[page 30\]](#)

[Setting Your Email Preferences \[page 25\]](#)

1.2 What you can do with SAP SuccessFactors Learning

Use this information to navigate the [Home](#) tab and find the help you need to work in SAP SuccessFactors Learning.

Common Tasks

If you want to...	Then click here...	And read this background help...
Start an online course	► Home ► My Learning Assignments ► Start Course ►	Starting and Completing Assignments [page 9]
Register for a course	► Home ► My Learning Assignments ► Register Now ►	Registering For a Learning Item [page 11]
Find a course	► Home ► Find Learning ►	Finding Learning Opportunities [page 15]

If you want to...	Then click here...	And read this background help...
Check for course credit	▶ Home > History ▶	Learning History [page 13]
View Your course details	▶ Home > My Learning Assignments > < Your Course Name > ▶	Sorting and Filtering your Assignments [page 10]
Manage your registration	▶ Home > My Learning Assignments > < Your Course Name > ▶ Then click Withdraw to withdraw from the course, View Registration to view your registration, or Assign to Others to assign the course to another user.	Registering For a Learning Item [page 11]
Mark a course complete	▶ Home > Links > Record Learning ▶	Record Learning Work Area [page 26]
Sort and filter learning assignments	▶ Home > My Learning Assignments > Sort By ▶ and ▶ Home > My Learning Assignments > Filter ▶	Sorting and Filtering your Assignments [page 10]
Complete an SF-182 form	▶ Home > Links > External Requests ▶	External Learning Requests Work Area [page 21]
Manage approval for an internal course	▶ Home > Links > Approvals ▶	Approvals Work Area [page 21]
Use the Training Planner	▶ Home > Links > Training Planner ▶	Training Planner Work Area [page 27]

Parent topic: [Getting Started \[page 4\]](#)

Related Information

[Tips for Success \[page 5\]](#)

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[Using the My Employees Tab \[page 7\]](#)

[Selecting a Localized Page for Unauthenticated Users \[page 8\]](#)

1.3 Home Tab Tiles

View this section if you want to know about [Home](#) tab tiles.

The Home Tab tiles can be moved around and re-sized during your session, but keep in mind that in some environments, they will return to the default size and location the next time you log in.

Parent topic: [Getting Started \[page 4\]](#)

Related Information

[Tips for Success \[page 5\]](#)

[What you can do with SAP SuccessFactors Learning \[page 5\]](#)

[Using the My Employees Tab \[page 7\]](#)

[Selecting a Localized Page for Unauthenticated Users \[page 8\]](#)

1.4 Using the My Employees Tab

Use this information to navigate the [Home](#) tab and find the help you need to work in SAP SuccessFactors Learning.

Depending on how your organization has configured SAP SuccessFactors Learning, you might see different options in the program.

All users have the [Home](#) tab. If you are a supervisor, you also see the [My Employees](#) tab.

Using the My Employees Tab

If you want to...	Then click here...	And read this background help...
View your employees' assignments	► My Employees ► Supervisor Links ► and then click the employee name	Viewing Employees' Learning Assignments [page 34]
Manage your employees' learning assignments	► My Employees ► Supervisor Links ► Assign/Remove Learning ►	Assign/Remove Learning Workspace [page 34]
Record an employee's completion of a course	► My Employees ► Supervisor Links ► Record Learning ►	Supervisor Record Learning Work Area [page 35]
Approve requests from employees	► My Employees ► Supervisor Links ► Approvals ►	Approvals Work Area [page 21]
Run reports	► My Employees ► Supervisor Links ► Reports ►	Report Work Area [page 26]

Parent topic: [Getting Started \[page 4\]](#)

Related Information

[Tips for Success \[page 5\]](#)

[What you can do with SAP SuccessFactors Learning \[page 5\]](#)

[Home Tab Tiles \[page 6\]](#)

[Selecting a Localized Page for Unauthenticated Users \[page 8\]](#)

1.5 Selecting a Localized Page for Unauthenticated Users

All pages visible to authenticated users are translated into your language, based on your choice in [Options and Settings](#), which the system reads when you log in. If you are not yet logged in, however, you must tell the system your language. When configured, you can select a locale for Login page display. The locale list defaults to the browser locale if it matches an active locale; otherwise it is set to the system's default locale.

Localized pages include: Login, Registration, Security Question and Answer, Forgot Username, and Forgot Password. If you are a site user (if you do not need to log in to see your learning catalog and calendar of offerings, your pages are also translated through the [Locales](#) list.

Parent topic: [Getting Started \[page 4\]](#)

Related Information

[Tips for Success \[page 5\]](#)

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[Home Tab Tiles \[page 6\]](#)

[Using the My Employees Tab \[page 7\]](#)

2 Starting and Completing Assignments

Use this information to start and complete courses to reduce your current learning assignments.

Completing Assignments

- An assignment can be instructor-led, online, or instructor-led with online content. Completing an online course is different from completing an instructor-led course because you can launch online courses at any time, but you must wait for the instructor's class to complete instructor-led courses.
- Instructor-led courses consist of classes that start at a particular time and place and with a particular instructor, so they start and finish on their own schedule. To enroll in a class, choose the [Register](#) button on the course card or within Course Details. After you've attended the class, the instructor or an administrator usually marks the course complete for you.
- You can start or continue online courses assigned to you at any time by choosing the [Start Course](#) or [Continue Course](#) action on the course card or within Course Details.
- The agenda of online courses can contain one or more sections of content.
- To see your completion of a section within an online course, you may need to choose the [Verify course completion](#)  ([Refresh](#)) button at the top right of the Online Content page. This button refreshes the page to reflect your completion progress within the online course and indicates the completion on the screen with a green check mark.

Note

The visibility of the [Verify course completion](#) button depends on type of online content and whether the content launches inline or in a new window. If the content doesn't need to be refreshed in order for completion to be recognized, the button won't be displayed.

- In the case of an agenda with multiple sections (for example, you've completed some content and there is an exam which follows), you should use this button to refresh the status of the content before moving on to the next section. Depending on the assessment settings, you may be required to use this button after completing an assessment to record your attempt and unlock the other content.
- When you finish the course, the system automatically records your completion in your [Learning History](#).

Recording Completion When It Doesn't Happen Automatically

- In some cases the system can't automatically add the course to your history. If your course is **not** added to your history automatically, try recording your own completion in ► [Learning](#) ► [Links](#) ► [Add to Learning History](#) .
- If you don't see [Add to Learning History](#), then someone else needs to record the learning for you. If the completed course doesn't appear in your history after a few days, contact your manager for help. Your

manager might be able to mark your course complete in ► [My Team](#) ► [Manager Links](#) ► [Add to Learning History](#) ►.

[Sorting and Filtering your Assignments \[page 10\]](#)

These tips help you prioritize and find learning assignments in your assignments list by using the Sort By and Filter options.

[Viewing the Details of Assignments \[page 11\]](#)

The details of an assignment can help you judge its importance and preview the course. Use these tips to view the details.

[Registering For a Learning Item \[page 11\]](#)

This topic describes how you register for courses.

[Curricula and Programs \[page 12\]](#)

This topic describes the extra features of learning assignments when the assignments are part of a curriculum or program.

[Learning History \[page 13\]](#)

The [Learning History](#) page contains the list of learning activities that you completed.

Related Information

[Earning Credit for Courses \[page 18\]](#)

[Approvals Work Area \[page 21\]](#)

[Record Learning Work Area \[page 26\]](#)

[Supervisor Record Learning Work Area \[page 35\]](#)

2.1 Sorting and Filtering your Assignments

These tips help you prioritize and find learning assignments in your assignments list by using the Sort By and Filter options.

When you open your assignments list, it is sorted by date because you should prioritize the assignments with the earliest due date. Your organization's learning administrator can also add a priority to your assignment to convey its importance. To sort by your organization's assignment priority, go to ► [Home](#) ► [My Learning Assignments](#) ► [Sort By Priority](#) ►.

To find learning assignments inside your assignments list, click ► [Home](#) ► [My Learning Assignments](#) ► [Filter](#) ►. Use the filtering options to find assignments within your list.

Parent topic: [Starting and Completing Assignments \[page 9\]](#)

Related Information

[Viewing the Details of Assignments \[page 11\]](#)
[Registering For a Learning Item \[page 11\]](#)
[Curricula and Programs \[page 12\]](#)
[Learning History \[page 13\]](#)
[Viewing the Details of Assignments \[page 11\]](#)
[Starting and Completing Assignments \[page 9\]](#)

2.2 Viewing the Details of Assignments

The details of an assignment can help you judge its importance and preview the course. Use these tips to view the details.

Your organization can choose to provide details or a cover page for the assignment so that you know what to expect from the course. Go to ► [Home](#) ► [My Learning Assignments](#) ► and then click the title of the course.

Many online courses include an introductory overview of the course content, so you can start a course to see what it covers. In your learning assignments, click [Start Course](#).

Parent topic: [Starting and Completing Assignments \[page 9\]](#)

Related Information

[Sorting and Filtering your Assignments \[page 10\]](#)
[Registering For a Learning Item \[page 11\]](#)
[Curricula and Programs \[page 12\]](#)
[Learning History \[page 13\]](#)
[Starting and Completing Assignments \[page 9\]](#)
[Sorting and Filtering your Assignments \[page 10\]](#)

2.3 Registering For a Learning Item

This topic describes how you register for courses.

Your organization might require you to register for a course to limit or predict attendance. For example, your organization might want you to register for a course so that the instructor has enough materials. To register for a course, go to ► [Home](#) ► [My Learning Assignments](#) ►, find the course you want to register for, and then click [Register](#). The registrations page opens.

📘 Note

If you already registered, then you can find the course you have registered for and click [View Registration](#) to open the registration page.

On the registrations page:

- If you see a current registration in [Current Registration](#), then you are already registered.
- If you do **not** see a current registration, check the available courses in [Available Offerings](#) to find one that fits your schedule. Click [Register Now](#) to register for it.
- If you do not find an available offering that fits your schedule, you can ask your organization to add a course. Go to [Request Schedule](#), complete the form, and click [Request](#)

📘 Note

Some registration requests require approval.

Parent topic: [Starting and Completing Assignments \[page 9\]](#)

Related Information

[Sorting and Filtering your Assignments \[page 10\]](#)

[Viewing the Details of Assignments \[page 11\]](#)

[Curricula and Programs \[page 12\]](#)

[Learning History \[page 13\]](#)

[Approvals Work Area \[page 21\]](#)

[Starting and Completing Assignments \[page 9\]](#)

2.4 Curricula and Programs

This topic describes the extra features of learning assignments when the assignments are part of a curriculum or program.

Curricula and programs group courses together so that you can reach a learning goal. For example, a curriculum might group together food washing, storage, and preparation courses to teach safe food handling to kitchen staff. Although curricula and programs work a little differently, you complete both the same way: you complete the assignments in the group. The assignments appear in ► [Home](#) ► [My Learning Assignments](#) ►.

How Programs and Curricula Differ

In general, curricula are designed to be rigid and formal for learning compliance. Programs are designed to be flexible and easier to use.

- Programs can have external content like videos and links. Unlike curricula, external content in programs does **not** need to be part of a formal course that you need to find in the [Find Learning](#) tile. Instead, it can just be a link.
- In curricula, you often must earn a passing completion status in a prerequisite to take the next course. Programs do not have formal prerequisites, but they do suggest an order.
- You rarely need to find courses to fulfill a program, but you often need to find courses to fulfill curricula.

How to Find Courses that Match your Curriculum Requirements

If you are responsible for finding the courses that meet your curriculum, here are some tips:

- To look at your curriculum and decide how you want to complete its assignments, go to ► [Home](#) ► [My Curricula](#) ►.
- To look for courses that help you complete your curriculum, go to ► [Home](#) ► [Available Offerings](#) ►.
- To substitute another course for the one you are currently assigned, go to ► [Home](#) ► [My Learning Assignments](#), ►, and then click the title of the assignment. Click the [View Substitute](#) link. Substitutes are courses that count toward your curriculum instead of the course you have been assigned.

Parent topic: [Starting and Completing Assignments \[page 9\]](#)

Related Information

[Sorting and Filtering your Assignments \[page 10\]](#)

[Viewing the Details of Assignments \[page 11\]](#)

[Registering For a Learning Item \[page 11\]](#)

[Learning History \[page 13\]](#)

2.5 Learning History

The [Learning History](#) page contains the list of learning activities that you completed.

To see your learning history from the:

- New Learning Home Page: Go to the activities menu dropdown, and choose [Learning History](#) .
- Legacy Learning home page: Choose the [Learning History](#) tile to see all completed activities.

Learners can download a PDF output of their completed learning activities using the [Download](#) option. When you download, the PDF output includes **all** your completed activities, regardless of any specific filters that you've applied.

→ Remember

The [Download](#) option isn't supported for managers, delegates, and proxied administrators when accessing the [Learning History](#) page of other users, irrespective of their report permissions.

Courses appear on the history list when you complete a course from your assignments, when you verify that you attended an external event, or when you or someone else records that you completed a course.

Parent topic: [Starting and Completing Assignments \[page 9\]](#)

Related Information

[Sorting and Filtering your Assignments \[page 10\]](#)

[Viewing the Details of Assignments \[page 11\]](#)

[Registering For a Learning Item \[page 11\]](#)

[Curricula and Programs \[page 12\]](#)

[Starting and Completing Assignments \[page 9\]](#)

[Earning Credit for Courses \[page 18\]](#)

[Record Learning Work Area \[page 26\]](#)

3 Finding Learning Opportunities

Use this information to find learning opportunities.

A learning opportunity is any course, book, video, or other learning material that you can find in the [Find Learning](#) tile. Look for learning that helps you reach a professional goal or that makes your current work easier. To find learning opportunities:

- Type text in the [Find Learning](#) tile and click [Go](#).
- Click [Browse all courses](#) to open a filterable list of all learning opportunities.
- Click [Browse all courses](#) to open a filterable list and then click [Course Calendar](#) to view the learning opportunities in a calendar.

Related Information

[Exploring Learning Opportunities \[page 16\]](#)

[Course Filters \[page 15\]](#)

[Available Classes \[page 16\]](#)

3.1 Course Filters

You can filter courses to help you get to the result you want.

Filter Name	Description
Category	The category describes whether you can take a course online, whether there is an instructor and therefore a scheduled time for it, or whether the course of learning is actually a set of courses bundled into a curriculum.
Subject Area	Subject areas categorize the content of the course.
Source	The source describes where the course originated. For example: internal courses and external courses.
Delivery Method	Delivery method is a more specific categorization than category. It describes how the course is conducted. For example, online, in a conference, in a virtual session, and so on.
Language	The language that the course is conducted in. Use the language filter to find courses in your native language.

3.2 Exploring Learning Opportunities

After you find learning opportunities, use these hints to explore the opportunities.

You find learning opportunities in the [Find Learning](#) tile. After you find learning opportunities, you can explore them to discover how they can impact your career growth or current job tasks:

- Click the title to read a description of the opportunity.
- Start the course to preview the content (available for some online courses).

If the course interests you, then you can add it to your own assignments list. In some cases, you can also add it to other users' assignment lists.

Related Information

[Finding Learning Opportunities \[page 15\]](#)

3.3 Available Classes

We suggest classes to you so that you can more easily find classes that help you complete your learning assignments.

Available classes are near your location and scheduled to start soon. We show them to you because you have some interest in them. It could be that you need it for a curriculum that you are assigned or that we noticed that the course is interesting to you but you haven't been able to enroll yet. The available classes tile is hard coded to return a max number of 50 classes and there is no configuration to change it.

3.4 Finding External Content

View this section if you want to know about web courses.

Massive open online content (MOOC) includes leadership or programming language skills courses. External content is available from SAP SuccessFactors Learningpartners.

The course catalogs from these partners must be enabled in the LMS by an administrator for the external content to be available in catalogs, grouped into learning systems like curricula, or directly assigned to users by administrators or supervisors. To access external content, go to ► [Home](#) ► [Find Learning](#) ► [Browse all courses](#) ► [Catalog Search](#) ► [Web Courses](#) ►.

From [Web Courses](#), you can view available external content, add a course to your assignments, or simply launch the course. After the external content course is launched, click the course link that takes you to the partner website.

Keep in mind:

- When you launch an external content course, you launch the provider's site to interact with the course outside SAP SuccessFactors Learning.
- You will need to log in to some external content course websites before accessing their external content. Course completions are either self-completed or by certificates, which are determined by organization.

4 Earning Credit for Courses

SAP SuccessFactors Learning offers you more than one way to earn credit. This topic describes how the system assesses your progress.

As you progress through your learning assignments, the system stops from time to time to assess your progress in your learning goals and it offers several ways to earn credit:

- Some courses grant credit when you start and complete them.
- Some courses grant credit when you pass an exam.
- A few courses have alternative ways of assessing your skills and knowledge:
 - Task checklists are a special type of exam: an observer watches you complete a task and indicates that you completed the steps in the task and that you were successful.
 - Some users, like administrators, can assign credit directly through the **record learning** process.

Related Information

[Starting and Completing Assignments \[page 9\]](#)

[Learning History \[page 13\]](#)

[Record Learning Work Area \[page 26\]](#)

[Supervisor Record Learning Work Area \[page 35\]](#)

4.1 Completing a Task Checklist Evaluation

A task checklist is a type of exam where an observer watches a participant complete a task and marks off the steps in a checklist. This topic describes how you complete the checklist.

About Task Checklists

A task checklist contains all of the tasks that users should be able to complete as a result of successfully learning the content of a learning item. As a user, a task checklist allows you to demonstrate your mastery of an item by demonstrating that you can complete each task that is associated with the item. If your administrator enabled a task checklist for an item, then the system places the item on your assignments list with a [Request Observation](#) action. You can also request an observation by viewing the item details for the item.

Nominating an Observer

If you are assigned a task checklist, your first step is to nominate other users to observe you complete the task. The observer's job is to watch you complete the task and to fill out a checklist that shows you completing each step in the task. To nominate a user, click [Request Observation](#).

You can search for and add any number of observers but only one observer can submit the results. You can continue to add or remove observers until an observer submits your task checklist with a completion status. When you add or remove an observer, the system places the item on the observer's assignment list with an [Open Observation](#) action. The observer can also launch the task checklist from the item details page.

Completing a Task Checklist

To complete a task checklist, open the checklist (click [Open Observation](#)). For each task in the list, silently read the task description and check the correct completion status. If you observe the person completing the task, mark the task complete. If not, mark it incomplete. You can also add comments for each individual task or for the entire checklist of tasks.

When the observation is over, you can record completion or record failure. In some situations, you could have task status of incorrect but still click Record Completion for the entire task checklist. Likewise, there are situations where you might have a task status of correct for all tasks but still click Record Failure for the entire task checklist. Your company or supervisor should provide guidance on the standards to use to determine completion or failure for a task checklist.

5 Links Tile (Work Areas)

This topic describes work areas that you can launch from the [Links](#) tile. The work areas manage workflows like requests, orders, and approvals.

A work area manages tasks that are related to your courses, like seeking approval to take an external course or running reports about your courses. Often, an administrator removes unused workspace links. For example, if your organization does not purchase courses, then your administrator can remove the [My Orders](#) link.

Related Information

[Approvals Work Area \[page 21\]](#)

[External Learning Requests Work Area \[page 21\]](#)

[My Orders Work Area \[page 24\]](#)

[Options and Settings Work Area \[page 25\]](#)

[Record Learning Work Area \[page 26\]](#)

[Report Work Area \[page 26\]](#)

[Training Planner Work Area \[page 27\]](#)

[Other Links \[page 29\]](#)

[News Page Work Area \[page 25\]](#)

[SAP SuccessFactors Learning Roles \[page 31\]](#)

5.1 My QuickGuides Work Area

View this section if you want to know about [My QuickGuides](#).

Some users can create QuickGuides, which are step-by-step instructions that can quickly create with your phone or browser and then upload to your learning catalog for others to see. If you are a user who can create QuickGuides, you can create a description that is searchable in the catalog and that is displayed when launching the guide. For example, if your QuickGuide is entitled, "Forwarding Calls from your PC", your description could be, "This describes how to forward phone calls on your office phone when you need to look up the extension."

If your company gives you access to QuickGuides, you can bookmark them from search results or a launched guide. You can access bookmarks from your home page in the [Bookmarks](#) tile.

5.2 Approvals Work Area

Use this information to manage your standard SAP SuccessFactors Learning approval process in the [Approvals](#) work area.

When you use the standard SAP SuccessFactors Learning approval process, each request for training can be approved or denied.

- If you approve requests for training, use the approvals work area to make the approval or to deny the request.

You can monitor or approve the following types of training requests in the [Approvals](#) work area:

- External Requests: approval to attend an external training event
- Internal Requests: approval to attend an internal training event
- E-Signature (Electronic Signature) Verification: An approval step that requires you to enter your e-signature code

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

[Approval Methods \[page 32\]](#)

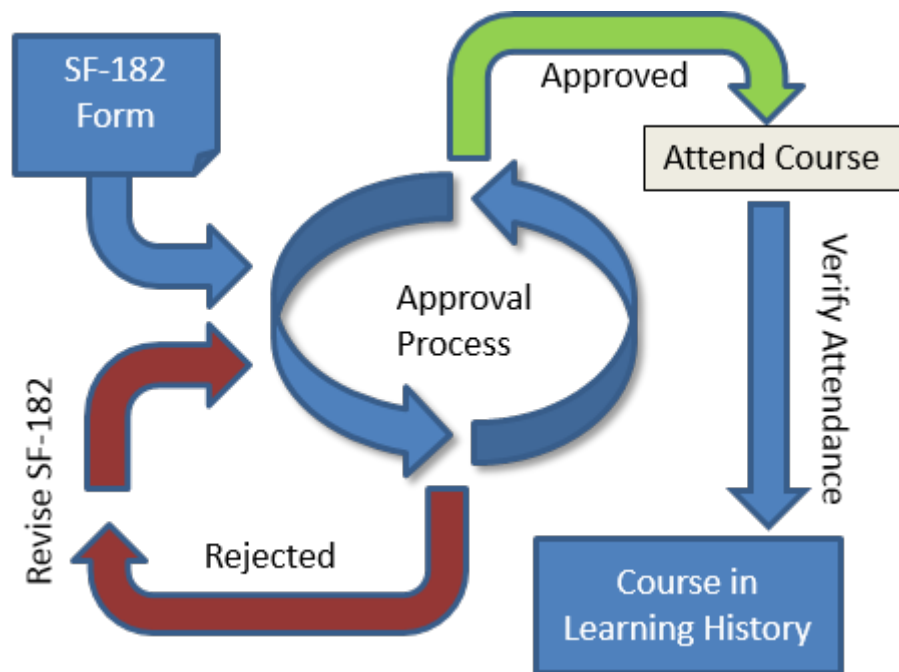
[SAP SuccessFactors Learning Roles \[page 31\]](#)

5.3 External Learning Requests Work Area

The external learning request work area is for organizations that require that you complete an electronic form as part of an approval process for external training: training that is outside of your organization. For example, United States Federal customers use a form called "SF-182" to request external training.

SAP SuccessFactors Learning provides a work area for external learning requests at [Home](#) [Links](#) [External Learning Requests](#). In the work area, you can:

- Complete and submit an online form requesting external courses
- View forms that have been sent to you for approval, and then approve or deny the request with a reason



External Learning Request (SF-182) Workflow

📌 Note

The phrase "External Learning Request" can be confusing. The workflow uses the phrase even after a request has been approved. A request can have multiple phases, including **approved**.

Completing an External Learning Request Form

Go to ► [Home](#) ► [Links](#) ► [External Learning Requests](#) ►

- To open a blank form, click [New Request](#).
- To reuse a form, changing only the form fields that need to change, click [Copy Request](#) next to the form you want to copy.

After you complete the form, follow the workflow wizard to send the form for approval. If you need help completing the form, click the [Instructions](#) link to open instructions on your particular form.

Approving or Denying Requests

When you have pending approval requests, you see an alert: ► [Home](#) ► [My Learning Assignments](#) ► [You have pending approval requests.](#) ► You can either click the alert or click ► [Home](#) ► [Links](#) ► [Approvals](#) ► to open the approvals work area.

Note

You use the same approvals work area whether you're approving an external learning request, approving the verification of an external learning request, or approving some other kind of request, such as internal training.

In the approvals work area, go to ► [Training](#) ► [External Training](#) ► and then follow the workflow wizard to approve or deny the request. Your organization might have multiple steps in the workflow, but at the end of the process, the request appears in the user's assignments list and the user's external learning request work area.

Identifying Upcoming External Training

To identify upcoming external training events, go to ► [Home](#) ► [My Assignments](#) ► [Filter](#) ►, and then select [External Learning Requests](#) from the course types list.

Verifying an External Learning Request

After you attend an event, you verify that you attended it. To verify your attendance, go to ► [Home](#) ► [Links](#) ► [External Learning Requests](#) ►. Find the request that corresponds to your event and click [Verify](#). Follow the workflow wizard to complete verification. After you verify your attendance, the event appears in your history.

Note

In many cases, you can verify your attendance by yourself. In some cases, an administrator must verify your attendance.

Attaching a Document to the External Learning Request and Verification Request

The users can now add documents in the SF-182 form, a [Single Attachment](#) or [Multiple Attachments](#) based on the configuration of an external learning request.

Users can create an [External Learning Request](#) with attachments and submit it for approval. The request can be approved or denied. Upon approval, the request moves on to verification. The request can either be approved or denied but the approvers should have access to the attachments during the approval process.

SECTION C: COSTS AND BILLING INFORMATION					
C.1. Direct Cost and appropriation/fund chargeable			C.2. Indirect Cost and appropriation/fund chargeable		
Item	Amount *	Appropriation Fund	Item	Amount *	Appropriation Fund
a. Tuition	\$		a. Travel	\$	
b. Books or Materials	\$		b. Per Diem	\$	
c. Total	\$		c. Total	\$	

C.3. Total Training Non-Government Contribution Cost	C.6. Billing Instructions
\$ C.4. Document Link / Prepaid Account / Requisition Number C.5. 8-Digit Station Symbol 	
C.7. Attachment *  File Attachments (0)	

Related Information

[Approvals Work Area \[page 21\]](#)

[Approval Methods \[page 32\]](#)

[Learning History \[page 13\]](#)

5.4 My Orders Work Area

The [My Orders](#) work area contains your orders for training. Use these tips to navigate your orders.

An order is a purchase. The [My Orders](#) work area contains a history of your orders and options for ordering more training. The system allows these purchasing options:

- Account code: Use an account code to charge the purchase training to the account. The account code usually belongs to your department.
- Voucher: A voucher is used to purchase training.
- Coupon: A coupon reduces or eliminates the cost of training.

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

5.5 News Page Work Area

This topic describes the news page, a read-only workspace that your organization can use to post information about SAP SuccessFactors Learning.

When you log on, the system displays a news page that your company can use to communicate with you. You can select *Do not show this page every time I sign in* to hide the page until the content changes. To open the hidden news page, go to ► [Home](#) ► [Links](#) ► [News](#) ►.

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

5.6 Options and Settings Work Area

The Options and Settings work area manages your preferences. Use this information to understand what you can control in the work area.

Go to ► [Home](#) ► [Links](#) ► [Options and Settings](#) ►. In the work area, you can control the following:

- Security options: you can reset your password or your security question.
- Notification options: you can decide when the system should send you an email message (for example, when a course is added to your assignments).
- Regional settings: you can set your time zone, currency, locale (language), and display formats.

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

5.7 Record Learning Work Area

Use this information to understand how the record learning work area affects your learning history.

The most common reason to use the record learning work area is to record your completion of an offline course: a course you attended in a classroom. Click ► [Home](#) ► [Links](#) ► [Record Learning](#) ► to get started. Many organizations remove the record learning link from the [Home](#) tab, so if you do not see the link, check with your supervisor to record learning.

Item Events and External Events

An "item event" exists in the Learning Management System (LMS): you can find it in the system.

- If you click [Item based event](#) in the Record Learning wizard and you can find your course, then your course is an item event.
- If you cannot find the course, then your course is an external event. Start over and select [External event](#).

ⓘ Note

Before you record an external learning event go to ► [Home](#) ► [Links](#) ► [External Requests](#) ► and look for external events to verify. Verifying an external event is different from recording external events.

When you record an external learning event, the system cannot find default values for you so complete the forms carefully.

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

[External Learning Requests Work Area \[page 21\]](#)

[Supervisor Record Learning Work Area \[page 35\]](#)

5.8 Report Work Area

In the report work area, you can run reports about your courses.

SAP SuccessFactors Learning reports follow these conventions:

- Bunched reports deliver the same information, but grouped and sorted differently. For example, **User Curriculum Status Group By Curriculum Details** and **User Curriculum Status Group By Item Details** both show users' curriculum status, but one report is grouped by the curriculum details and the other by the course (item) details.

- Reports with "(CSV)" in the title deliver the information in a Comma-Separated Values (CSV) format so that you can open them in a spreadsheet editor like Microsoft Excel.

5.9 Training Planner Work Area

The training planner is a way to seek approval for a course in organizations with centralized planning. This topic describes how the training planner works.

With the training planner, you submit your training requests in bulk to either the [My Requests](#) section (individual requests) or the [My Team's Requests](#) (supervisors' requests for a team). You can add both internal and external requests.

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

[Training Planner Roles \[page 27\]](#)

[Training Planner Workflow \[page 28\]](#)

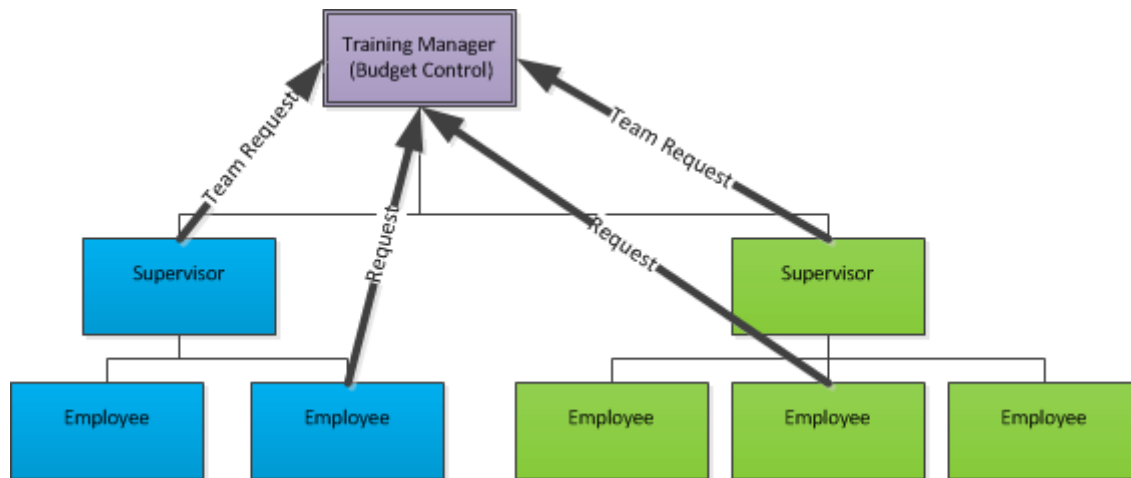
[Approval Methods \[page 32\]](#)

5.9.1 Training Planner Roles

Use this information to understand how you fit into the training planner process.

The primary users of the training planner are the training managers, who are responsible for budget approval, but all three roles must consider training needs, and their cost, over the planning time period.

- If you are a training manager, your job is to keep your training plan on budget. Use the workspace to consider your organization's training requests, and approve or deny the requests to stay in budget.
- If you are a supervisor, your job is to consider the training needs of your team and submit the requests with their costs.
- If you are an employee, your job is to consider your own training needs and submit them, with a cost, to the training manager.



How Requests From Users Roll up to the Training Manager

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

[Training Planner Work Area \[page 27\]](#)

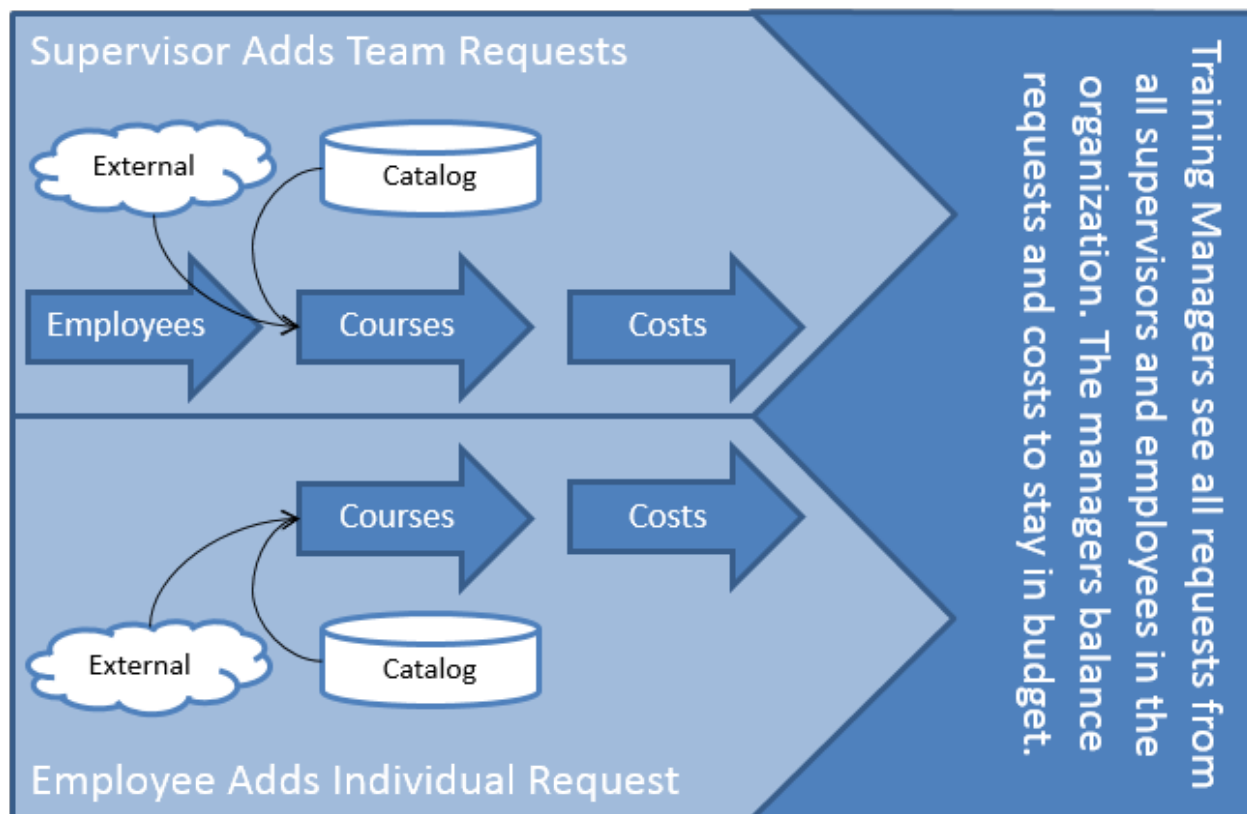
[Training Planner Workflow \[page 28\]](#)

[Approval Methods \[page 32\]](#)

5.9.2 Training Planner Workflow

Use this information to understand how the training planner accepts requests and approves them.

The training planner is a budget request system. Employees and supervisors find courses, add headcount and cost information, and then send the requests to the training manager, who approves the budget. Supervisors can add training requests for their team of employees. Individual employees can add requests for themselves.



Training Planner Workflow

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

[Training Planner Work Area \[page 27\]](#)

[Training Planner Roles \[page 27\]](#)

[Approval Methods \[page 32\]](#)

5.10 Other Links

Your organization can add links to the [Links](#) tile.

Links are highly customizable. For example, your company might add a link to its intranet in the [Links](#) tile, or it might remove the [External Requests](#) link if it isn't using the external requests process.

6 Important Concepts

6.1 Types of Learning Offerings in SAP SuccessFactors Learning

Learning items, scheduled offerings, and curricula are the three fundamental units of learning - courses - in SAP SuccessFactors Learning.

Courses, Classes, Curricula, and Programs

A **course** is similar to a math course you find in a university course catalog: the university tracks your progress in the course and grades you when you complete your exams. In SAP SuccessFactors Learning, your learning administrator tracks your completion in a course (for example, **workplace safety**).

A **class** is similar to one scheduled math course at a university: it can be offered on Mondays at 10 AM and on Wednesdays at 6 PM. You can attend either one and earn credit. In SAP SuccessFactors Learning, your learning administrator wants to know which of the scheduled **workplace safety** courses you attended.

A **curriculum** is similar to a degree in the university: if you earn your degree in mathematics, you have taken a number of required math courses and some elective courses. In SAP SuccessFactors Learning, a curriculum is smaller than a university degree, but it has similar rules and requirements, and you cannot complete the curriculum until you have completed your required courses. For example, the workplace safety course can be part of a larger **Safety and Security Basics** curriculum that covers workplace safety, computer security, building security, and travel safety.

A **program** is like a curriculum except that it accounts for its hours differently and uses different rules to determine which courses you take. Programs are often informal groups of courses.

6.2 Learning Assignments and Learning History

Your learning assignments are courses you need to complete and your learning history is the list of courses you have already completed. This topic describes the two lists.

Your learning assignments list includes all work you need to do, including learning items, scheduled offerings, and curricula. It is the central place for your assignments.

Your learning history is a record of the work that you completed. When you finish a course, it moves from the learning assignments list to the learning history list.

Related Information

[Starting and Completing Assignments \[page 9\]](#)

[Learning History \[page 13\]](#)

6.3 SAP SuccessFactors Learning Roles

Your role determines what you can do in SAP SuccessFactors Learning. This topic describes the available roles.

- **Learners:** All users are learners and have access to the [Home](#) tab.
- **Supervisors:** Some learners are also supervisors who use the [My Employees](#) tab to manage other users' learning.
- **Organization Owners:** Organization owners oversee the learning of an entire organization and the [Organization](#) tab.
- **Administrators:** A few learners are also learning administrators who oversee the learning system. They use the [Admin](#) tab.

Related Information

[What you can do with SAP SuccessFactors Learning \[page 5\]](#)

[Using the My Employees Tab \[page 7\]](#)

6.4 Offline Learning

There are two ways to view content when you aren't connected to the internet: the Offline Player web client and Mobile Learning. This topic describes the differences between the two.

Offline Player for Web

You can download learning content to the Offline Player and disconnect from the internet to work on the content offline. The Offline Player tracks the content objects you complete while you're offline. When you log back in to the Offline Player, you synchronize your progress with Learning.

Offline Content for Mobile

You can download certain learning content to launch offline in the SAP SuccessFactors Mobile app. Your learning administrator can restrict the content that can be downloaded to Mobile Learning.

6.5 Approval Methods

When you need approval to attend a course, use this topic to understand the different methods for approval.

SAP SuccessFactors Learning provides three approval processes. In most cases, your organization uses only one or two processes. Approval processes are managed from the [Links](#) tile.

- Standard approval process: The standard approval process is the most common. Your organization creates an approval process with one or more steps. You manage approvals in the [Approvals](#) workspace.
- External learning requests process: Most commonly used by United States Federal organizations, the external learning request process uses the standard federal SF-182 form to request external training. You manage external learning requests in the [External Learning Requests](#) workspace and also the [Approvals](#) workspace.
- Training planner process: The training planner is used by organizations that plan their training on a budget period like fiscal year and that have a top-down training approach. You manage training planner approvals in the [Training Planner](#) workspace.

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

[Approvals Work Area \[page 21\]](#)

[External Learning Requests Work Area \[page 21\]](#)

[Training Planner Work Area \[page 27\]](#)

6.6 Site Catalog Behavior in Learning

External unauthenticated users accessing the site catalog must add both free and priced items to their shopping cart.

If you're an external unauthenticated user trying to add a free course through the Learning site catalog, you must add the item to your cart and complete the shopping process.

When you're adding free and priced items, click [Add to Cart](#) to take you to your shopping cart.

If you create and log in with an account, you can select free courses that are added to your Learning Assignments. You can then launch them without any further action.

Both external and authenticated users must click [Add to Cart](#) for priced courses and complete the process through their shopping cart.

7 Supervisor Actions

7.1 Viewing Employees' Learning Assignments

Supervisors can use this information to view their employees' [Learning Assignments](#) list.

Supervisors can manage their employees' learning assignments in the [My Employees](#) tab. Click a user to open the assignments. Click the more button  to see options for managing the employee's assignments and application.

Related Information

[Using the My Employees Tab \[page 7\]](#)
[Assign/Remove Learning Workspace \[page 34\]](#)
[Register/Withdraw Employees Work Area \[page 39\]](#)
[Assigning Alternate Managers \[page 40\]](#)
[Report Work Area \[page 26\]](#)
[External Learning Requests Work Area \[page 21\]](#)
[Options and Settings Work Area \[page 25\]](#)
[Supervisor Record Learning Work Area \[page 35\]](#)

7.2 Assign/Remove Learning Workspace

Supervisors can use this information to help them add and remove assignments from their employees' [Learning Assignments](#) list.

Supervisors can add and remove assignments to and from their employees' [Learning Assignments](#) list. Click ► [My Employees](#) ► [Assign/Remove Learning](#) ►. When supervisors search for assignments, they search their catalog and not the users' catalogs.

Note

You can also assign learning by finding it in the [Find Learning](#) tile and then clicking [Assign to Others](#).

Related Information

[Searching in Assign Learning Work Area \[page 35\]](#)

7.3 Searching in Assign Learning Work Area

When you search in the assign learning work area, the search behaves a little differently than the [Find Learning](#) tile. This topic explains how the search works in the assign learning work area.

In the assign learning work area, the system search is not case sensitive: searching for "ADMIN", "Admin", and "admin" returns the same results.

- When you click [Search](#), the system searches the title and description for your search criteria. Therefore, the title for some of the search results will **not** match your search criteria. For example, if you searched for "ADMIN" and the system found a title that is "Communicating Effectively," then the description for Communicating Effectively contains the search string that you specified (that is, it contains "ADMIN").
- If you select [Exact Phrase](#), then the system ignores capitalization and searches for the exact phrase, including spaces. For example, if you select [Exact Phrase](#) and search for the keywords "ED AD", then the search results could contain "Advanced Administration Topics" (because the last two letters of "Advanced" and the first two letters of "Administration" are "ed ad").
- If you clear [Exact Phrase](#), then the system searches for the exact phrase and uses any spaces in the keywords differently. If you have multiple keywords, then the system treats each word (as identified by a space) as a separate search. The search results must contain all words, but the keywords can be in any order. For example, if you clear [Exact Phrase](#) and search for the keywords "simul VANCE", then the search results could contain "Advanced Administrative Support Simulation" (because "simul" is contained in "Simulation" AND "VANCE" is contained in "Advanced").
- If you select [Search All Languages](#), then the system returns results from any locale. To limit the search results to your preferred locale only, then you can clear the Search All Languages check box.

Related Information

[Assign/Remove Learning Workspace \[page 34\]](#)

[Finding Learning Opportunities \[page 15\]](#)

7.4 Supervisor Record Learning Work Area

Supervisors can use this information to record course completion for users.

Supervisors can record learning for their employees in the [My Employees](#) tab. You record learning when the system cannot do it by itself: for example, when your employee completed an external event or completed a classroom course. When you click [Record Learning](#) the record learning wizard opens.

Item Events and External Events

An "item event" exists in the Learning Management System (LMS): you can find it in the system.

- If you click [Item based event](#) in the Record Learning wizard and you can find your course, then your course is an item event.
- If you cannot find the course, then your course is an external event. Start over and select [External event](#).

Note

Before you record an external learning event go to ► [Home](#) ► [Links](#) ► [External Requests](#) ► and look for external events to verify. Verifying an external event is different from recording external events.

When you record an external learning event, the system cannot find default values for you so complete the forms carefully.

Audit Data

When you record a learning event, the system collects data for an audit trail. When your organization or the employee is audited for learning history, the data you enter can be part of the audit.

Related Information

[Course Scheduling Records \[page 36\]](#)

[Course Completion and Grading for Records \[page 37\]](#)

[Types of Learning Hours \[page 38\]](#)

[Recording Costs for Learning Events \[page 38\]](#)

7.4.1 Course Scheduling Records

This topic describes the default and recommended use of the learning completion data. This data is important to create an audit trail of your users' learning.

This topic contains the default, recommended usage of completion data for auditing purposes. Your organization might use the data differently.

Course Schedule Data for Audits

Data Name	Audit Trail Application
Completion Date and Time	In audit reports, the completion date and time is when the user completed the learning. When you record learning for a user, the completion date and time must be in the past because the user must have already completed the item before you record the event. If the system knows the completion time, it populates the date and time for you.
Completion Time Zone	The system uses the time zone to be specific about the completion date and time. Select the time zone that matches the users' completion.
Instructor Information	The instructors' name or ID identifies the instructor teaching the course. If more than one instructor taught the course, choose the primary instructor.
Default Grade	The default grade is a flexible way to record a users' performance in a course. Use your organizations' system for grading (letters, percentages, or numbers, for example).

Related Information

[Supervisor Record Learning Work Area \[page 35\]](#)

7.4.2 Course Completion and Grading for Records

This topic describes how course completion and grading affects your organization's completion records.

Course Completion and Grading Data for Audits

Name	Description
Default Grade	The default grade is a flexible way to record a users' performance in a course. Use your organizations' system for grading (letters, percentages, or numbers, for example).
Completion Status	If the system can find the default completion status for the course, it populates the completion status for you. Use the status that the system finds for you unless you know it should be different.

Related Information

[Supervisor Record Learning Work Area \[page 35\]](#)

7.4.3 Types of Learning Hours

This topic contains the types of learning hours that the Learning Management System (LMS) records.

This topic contains the default, recommended usage of learning hours for auditing purposes. Your organization might use hours differently.

Learning Hours Recommended Usage

Name of Hour Type	Usage
Total Hours	The Total Hours type is the total number of hours that you expect a user to be engaged in completing a learning event. If the course is divided into segments of time, the system defaults total hours to the sum of the time in all the segments. The hours to sum differ slightly depending on what you are recording. If the user attended a specific course (scheduled offering), then the system calculates the difference between the start and end times of each segment, adds those values, and places that in the Total Hours box. If the user attended a course that doesn't have a specific record in the system and you are recording against the default settings for the courses (an item) then the system adds the duration values for each segment in the default (item) record and places that in the Total Hours box.
Credit Hours	Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. colleges, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equals 45; however, the college grants 3 credit hours for this class.
Contact Hours	Contacts hours are the total number of hours that you expect a user to have contact with an instructor. For example, if you set up a blended item that has 8 total hours and, for 6 of those hours, you expect the user to be in an instructor-led segment, then the contact hours equals 6.
CPE Hours	CPE is an abbreviation for "Continuing Professional Education." CPE refers to learning activities that users perform to maintain and expand the skills that their profession demands. Therefore, CPE hours are very much like credit hours. Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. colleges, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equals 45; however, the college grants 3 credit hours for this class., but the accumulation of CPE hours often leads to a professional certification.

7.4.4 Recording Costs for Learning Events

This topic describes how costs are recorded for learning events.

When you record a learning event for a user, you have the opportunity to record the cost of the event. Select the currency and then type the amount that the event cost by category (Transportation, Lodging, and so on). Learning administrators control the categories for your organization.

Related Information

[Supervisor Record Learning Work Area \[page 35\]](#)

[SAP SuccessFactors Learning Roles \[page 31\]](#)

7.5 Register/Withdraw Employees Work Area

This topic describes how supervisors can register and withdraw users from courses.

As a supervisor, you interact directly with your team of employees most often, and you are better positioned to understand what classes a particular employee needs or doesn't need. Therefore, you can use the Registration wizard to manage those needs by withdrawing or registering users for classes.

Note

You can only enroll or withdraw users from classes that have not yet started.

When you register a user, you can enter comments about registering the user. For example, you might want to inform the instructor of any special needs or circumstances about a user you have registered. Administrators can access your comments by viewing the class record; end users never see your comments.

Related Information

[Viewing Employees' Learning Assignments \[page 34\]](#)

7.6 Approvals Work Area

Use this information to manage your standard SAP SuccessFactors Learning approval process in the [Approvals](#) work area.

When you use the standard SAP SuccessFactors Learning approval process, each request for training can be approved or denied.

- If you approve requests for training, use the approvals work area to make the approval or to deny the request.

You can monitor or approve the following types of training requests in the [Approvals](#) work area:

- External Requests: approval to attend an external training event
- Internal Requests: approval to attend an internal training event
- E-Signature (Electronic Signature) Verification: An approval step that requires you to enter your e-signature code

Related Information

[Links Tile \(Work Areas\) \[page 20\]](#)

[Approval Methods \[page 32\]](#)

[SAP SuccessFactors Learning Roles \[page 31\]](#)

7.7 Assigning Alternate Managers

Use this topic to understand how and when you assign a user to an alternate manager.

When users work for an extended period on projects that have them reporting to a different manager, then you can transfer responsibility for completing the primary manager's tasks (for example, assigning or approving learning items) to an alternate manager. When you click [Manage Alternate Managers](#), you can identify other users as alternate managers and assign primary responsibility to them. After you assign a user as an alternate manager, the system updates the [My Employees](#) area of the user interface for that alternate manager by including the user for whom they now have responsibility to complete a task. The alternate manager can then proceed to complete the task or to identify another alternate manager for this user.

In the user interface, primary and alternate managers can assign any responsibility for tasks such that an alternate manager could reassign responsibility back to the primary manager; however, primary and alternate managers can't remove an alternate manager who was included by an administrator. Users (primary and alternate managers) can only remove the alternate managers that they've identified or the ones that their alternate managers have identified. Furthermore, alternate managers can't remove themselves from the list of alternate managers. An administrator can remove any alternate manager.

Related Information

[SAP SuccessFactors Learning Roles \[page 31\]](#)

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