SuccessFactors Learning: Scheduling Management

Classroom Guide

v 6.4
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Course Introduction

Through lecture, activities, and hands-on computer lab work, this course teaches you the concepts and terminology associated with scheduling instructor-led items in the SuccessFactors Learning Management System (LMS). You will gain basic, hands-on experience using the LMS functions to schedule items and assign resources.

OBJECTIVES

Upon completion of this course, you will be able to:

♦ Describe the process for creating a scheduled offering
♦ Create a scheduled offering
♦ Assign resources to a segment within a scheduled offering
♦ Register users for a scheduled offering
♦ Reserve slots in a scheduled offering
♦ Record segment attendance
♦ Record learning events
♦ Copy scheduled offerings

TARGET AUDIENCE

This training is intended for SuccessFactors LMS administrators (admins) responsible for creating and modifying scheduled offerings and classes in SuccessFactors Learning.
ASSUMPTIONS

The SuccessFactors Learning system is highly configurable. During this training, you will be working in a representative environment. To properly progress through the training and when navigating the system, you must understand some assumptions.

Browser Pop-up Window

Do not block pop-up windows in your browser. Please unblock pop-up windows so that the application may function as designed.

When you first log in to SuccessFactors Learning, the following message banner may display at the top of your browser window:

Pop-up blocked. To see this pop-up or additional options, click here.

If this banner displays, perform the following steps:

1. Click the pop-up blocked message.
   A box displays with a few options.
2. Select the Always allow pop-ups from this site option.
3. Click Yes.
4. Once the setting is selected, you will not see the pop-up blocked warning again.

Administrator Role and Workflows

This training assumes that your SuccessFactors Learning administrator role is associated with all available workflows in the system. If your role does not include certain workflows, those tabs and pages will be grayed out and/or inaccessible.
Required Fields

Your system administrator configured specific fields throughout the system as required based on your organization’s business rules and processes. These required fields are indicated with a red asterisk (*). You must input data in these fields before you are allowed to progress.

If you are using SuccessFactors Learning for training, the fields displayed and marked as required may not reflect the settings you will encounter when accessing your organization’s system. Your system administrator can provide you with a list of the required fields for your organization.

**USING THIS GUIDE**

This classroom guide is designed to be used in conjunction with an instructor. The guide provides general information that will be elaborated upon by the instructor. For additional information, refer to the online help.

Throughout the guide, you encounter icons that call out various types of information. The following table illustrates how this guide uses icons to indicate different types of comments, activities, labs, etc. that support the text.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Activity" /></td>
<td><strong>Activity:</strong> Indicates an activity for you to complete that helps reinforce the information you just learned.</td>
</tr>
<tr>
<td><img src="image" alt="Note" /></td>
<td><strong>Note:</strong> Indicates additional information that is related to the information presented.</td>
</tr>
<tr>
<td><img src="image" alt="Tip" /></td>
<td><strong>Tip:</strong> Indicates helpful hints and tips or other guidance that further explains the information it accompanies.</td>
</tr>
<tr>
<td>Icon</td>
<td>Definition</td>
</tr>
<tr>
<td>------</td>
<td>------------</td>
</tr>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td><strong>Navigation Tip:</strong> Indicates tips or other guidance on navigating and using SuccessFactors LMS more effectively and efficiently.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td><strong>Lab:</strong> Indicates a hands-on computer lab. Follow the step-by-step process outlined to perform specific tasks in the system.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td><strong>Job Aid:</strong> Indicates there is a job aid available for the task. Job aids provide detailed instructions and screen captures to help you complete a task.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td><strong>Additional Resource:</strong> Indicates related resources or workbook with instructions and examples to help you complete a task.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td><strong>Warning:</strong> Warns against particular actions, or that a particular condition might indicate a problem.</td>
</tr>
<tr>
<td><img src="image6.png" alt="Icon" /></td>
<td><strong>Workflow:</strong> Indicates you must have the proper security workflow assigned to you in order to have access to this feature or action.</td>
</tr>
</tbody>
</table>

**ADDITIONAL RESOURCES**

There are a number of additional resources that can provide you more information about the SuccessFactors LMS.

These resources include:

- SuccessFactors, Inc. website:
  
  [http://www.successfactors.com](http://www.successfactors.com)

- Online system help

- Task-specific job aids

- SuccessFactors monthly newsletter

For more information about other courses and registration, contact SuccessFactors University at [training@successfactors.com](mailto:training@successfactors.com).
Lesson 1: Scheduled Offerings

After creating instructor-led/blended items, the next step is to schedule them for a specific date, time, and location in order to track user registration. Scheduled offerings are scheduled items used to manage resources, user registration, and course duration.

OBJECTIVES

Upon completion of this lesson, you will be able to:

♦ Define scheduled offering terminology
♦ Create a scheduled offering
♦ Describe the purpose of the main tabs within a scheduled offering

SCHEDULING OVERVIEW

Scheduling management is the process of creating scheduled offerings for instructor-led/blended items or schedule blocks. This course focuses on scheduling items within SuccessFactors Learning. Creating a scheduled offering places an instance of the item on the calendar, allows resources to be associated with it, and allows users to be registered into it. Users are registered into scheduled offerings by the admin, their supervisor, or themselves. The process also triggers email notifications that may be sent to participants, supervisors, instructors, and contacts associated with the offering.
Scheduling Terminology

Table 1 presents some terms and definitions related to scheduling in SuccessFactors Learning.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled Offering</td>
<td>An item that has been scheduled and placed on the training calendar with a start date and start time.</td>
</tr>
<tr>
<td>Schedule Block</td>
<td>A schedule block prevents resources from being scheduled into another offering during a given time. Schedule blocks are often used to make users and resources unavailable on the learning calendar, such as when equipment is undergoing maintenance, or a user is out of the office for an extended period of time.</td>
</tr>
<tr>
<td>Segment</td>
<td>A unit of time within a scheduled offering. A scheduled offering must have at least one segment, but can have multiple segments. Segments are used primarily for resource management.</td>
</tr>
<tr>
<td>Class</td>
<td>A group of users who are tracked as a group and perhaps complete a series of scheduled training requirements.</td>
</tr>
<tr>
<td>Resources:</td>
<td>Assets that are assigned and reserved to a segment within a scheduled offering.</td>
</tr>
<tr>
<td>Instructor</td>
<td>A person who will instruct or facilitate a specific portion of the scheduled offering.</td>
</tr>
<tr>
<td>Facility</td>
<td>A building where training takes place (e.g., Headquarters).</td>
</tr>
<tr>
<td>Location</td>
<td>A space or room within facility (e.g., a classroom, computer lab).</td>
</tr>
<tr>
<td>Equipment</td>
<td>Reusable training objects (e.g., VCR, TV, video cameras, or LCD).</td>
</tr>
<tr>
<td>Materials</td>
<td>Consumable training objects (e.g., notepads, markers, or specific training guides).</td>
</tr>
<tr>
<td>Custom Resources</td>
<td>Resources not categorized above intended to track training cost (e.g., catering or parking fees).</td>
</tr>
</tbody>
</table>

Adding a Scheduled Offering

When you add a new scheduled offering, you must select the item to schedule and determine a start date and time. SuccessFactors Learning creates the segments of the scheduled offering using the information from the Segments tab from the Related area of the selected item record (Figure 1).
Each scheduled offering is comprised of one or more segments. A segment is a block of time that can have resources assigned to it. Once the scheduled offering is created, an authorized admin can change the segment defaults.

Like items, scheduled offerings are made available to users via catalogs. When a new scheduled offering is created the admin has the option to publish the new scheduled offering to all associated catalogs. You may remove scheduled offerings from certain catalogs, thereby making specific scheduled offerings available to some users but not others; however, a scheduled offering cannot be added to a catalog that the item is not in.

You can add scheduled offerings from four locations:

- From Welcome page, click the **Add Scheduled Offering** quick link

  **Note:** To access the Welcome page and quick links, navigate to Admin > Home, or click the View Welcome Page icon in the Bookmarks section.

- Type **Add Scheduled Offering** into Search field below the button bar and click **Go**

- Item record (click the **Schedule** link in the Actions area)

- Navigate to Learning > Scheduled Offerings and click the **Add New** link
All four locations run a tool that provides a wizard interface, a schedule preview, and a resource usage view for scheduling items (or schedule blocks) (Figure 2).

From this tool, you may set the default schedule information and select the default instructor, location, and equipment resources for all segments of the scheduled offering. The schedule preview and a resource usage view show possible resource conflicts.

**Start Dates, Start Times, and Time Zones**

When scheduling an item, you must specify a start date, start time, and time zone of delivery. You may also decide to enable the **Use Time Zone of this Offering** option. If you want the start and end times of each segment to be displayed in the selected time zone, click **View All** from the core area to open the
Additional Settings page. Scroll down to the Physical Schedule section and select Yes from the Use Time Zone of this Offering drop-down menu. This is useful if users are attending the offering from different time zones (Figure 3).

![Figure 3. Scheduled Offering Time Zone Setting](image)

If this option is set to No, then all times will be recalculated and displayed to the admin/users in their preferred time zone (set in preferences).

Tip: The admin should set this option to No for Virtual Learning System (VLS) scheduled offerings, as it will be beneficial for everyone to see the times in his/her own time zones.

Note the Always display Scheduled Offerings in this Time Zone checkbox, located under Preferences of both the user and admin records, will override the selection within the Use Time Zone of this Offering drop-down menu within the scheduled offering record. This means that an admin or user will see all scheduled offerings in his/her own time zone - regardless of the setting for a particular scheduled offering.
After you have entered all required information, click **Preview** to view the basic scheduling information for the offering (Figure 4).

2. **Schedule Information**

   - **Start Date:** 08/15/2011
   - **Start Time:** 08:00 am
   - **Time Zone:** Eastern Standard Time (America/New York)

   **Schedule Date/Time**
   - 8/15/2011 08:00 AM - 12:00 PM
   - 8/15/2011 01:00 PM - 05:00 PM

   Figure 4. Schedule Information for New Scheduled Offering

**Resources**

The primary purpose of the Resources area (Figure 5) is to allow you to identify any of the listed resources (Facility, Primary Location, Primary Instructor, Equipment) required for the scheduled offering.

3. **Resources**

   - **Facility:** New York Office (NY)
   - **Primary Location:** New York Classroom 01 (CLASS-NY-01)
   - **Primary Instructor:** JEDADAMS
   - **Equipment:** Overhead Projector (OVER1)

   **Resource Usage**
   - **View:** Location

   | Scheduled Offering | 8/24/2011 08:00 AM - 10:00 AM | Excellence at Customer Service Simulation(3524) |

   Figure 5. Identify Resources for New Scheduled Offering
If the facility, location, or equipment that you wish to attach to the scheduled offering does not already exist in system, then you can add it directly from the wizard interface. This is done by clicking the **Add icon (➕)** next to the respective resource field (Figure 6). The ability to add from the wizard is controlled by workflows.

![Figure 6. Add New Resources](image)

After you enter all required information and associate the scheduled offering with at least one resource, select that resource from the **Resource Usage View** drop-down menu (Figure 7). The system shows all of the other scheduled offerings that also use the resource selected. If nothing is displayed, then the resource you selected is not being used by any other scheduled offering.

![Figure 7. View Resource Usage](image)
Add New Scheduled Offering

**Step**

1. Verify the **Admin** tab is selected.

2. Access the Add New Scheduled Offering wizard in one of the four ways described in the previous section.

3. Select the **Item** type radio button.

4. Click the **Item ID magnifying glass** icon to search for the item to schedule (depending on the method you selected in Step 2, this information may be pre-filled).

5. Enter a description for this scheduled offering.

6. Specify a domain for the new record.

7. Check the **Publish in all associated catalogs** checkbox.

   *Note: If you select the **Publish in all associated catalogs** checkbox, then (when you save the new scheduled offering) the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes it visible and possibly available for users to self register.*

8. Select a start date, start time, and time zone.

   *Note: The scheduled start date and time and the scheduled end date and time will appear below the schedule information.*

9. **Optional**: Click **Preview** to view the basic information for the offering.

10. Select a facility from the **Facility** drop-down menu.

11. If applicable, select the other resources associated with the scheduled offering: location, instructor, and equipment.

   *Note: Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.*

12. Click **Save**.
13. If there are any warnings, the Warning Details screen displays. Click Yes to continue.

14. The scheduled offering record displays allowing you to make further configurations.

15. For use in future labs, record the system generated scheduled offering ID (numeric value located in the upper right corner of the core area).

*Job Aid: Create Scheduled Offering*
**SCHEDULED OFFERING RECORD: MAIN AREAS**

The scheduled offering record is divided into three main areas (Figure 8):

- **Core** (outlined in red at the top left)
- **Related** (outlined in yellow at the bottom half)
- **Actions** (outlined in green at the top right)

These areas contain fundamental information regarding the scheduled offering. Some areas may be inaccessible (grayed out) depending on your role as an administrator within the system.

This portion of the guide focuses on the most commonly used scheduled offering record areas, specifically the core area, and the Registration, Catalogs, and Segments tabs from the Related area, and describes some of the attributes found within these areas.
Core Area: Summary

You can use the core area of the selected scheduled offering record to update the basic attributes of the record (summary information). These attributes could include, for example, the offering description, domain, facility, registration settings, and any other fields deemed required by the global system administrators or added based on your Personalize fields preferences (Figure 9).

![Figure 9. Scheduled Offering > Core Area](image)

Click **View All** to see additional settings for the scheduled offering, including title, description, summary, extended summary, physical schedule, and registration.

Table 2 provides the comprehensive list of fields that may be found within the scheduled offering record, a description of each field, and whether the field is displayed to users.

**Table 2. Scheduled Offering Record: Fields and Descriptions**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Displays to User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Additional information about the scheduled offering for users.</td>
<td>X</td>
</tr>
<tr>
<td>Group Instance</td>
<td>A method to group scheduling offerings for reports.</td>
<td></td>
</tr>
<tr>
<td>Domain</td>
<td>Indicates admin ownership of the scheduled offering (e.g., HR, IT, etc.).</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Displays to User</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Facility</td>
<td>The building where the scheduled offering takes place.</td>
<td>X</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Indicates the time zone of the scheduled offering.</td>
<td>X</td>
</tr>
<tr>
<td>Show in this Time Zone</td>
<td>Displays the offering in the time zone specified above to users and admin if <em>Always Display Offerings in this Time Zone</em> is not checked.</td>
<td></td>
</tr>
<tr>
<td>Approval Process ID</td>
<td>Indicates a default approval process (if applicable) that a user must complete before being able to complete the self-registration process.</td>
<td></td>
</tr>
<tr>
<td>Approval Required</td>
<td>This checkbox triggers the approval process entered in the <em>Approval Process ID</em> field.</td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>The name of contact person for the scheduled offering (can also be included in the registration notification email).</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Email address of the contact person of the scheduled offering (can also be included in the registration notification email).</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>Phone number of the contact person of the scheduled offering (can also be included in the registration notification email).</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td>Fax number of the contact person of scheduled offering (can also be included in the Registration Notification email).</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>This checkbox is used to indicate whether a scheduled offering is active and displays in the user catalogs.</td>
<td></td>
</tr>
<tr>
<td>Auto Fill Registration</td>
<td>Sets the default for scheduled offerings, so that users are automatically moved from the waitlist to registration slots that open up when previously registered users withdraw.</td>
<td></td>
</tr>
<tr>
<td>Enable Users to Waitlist</td>
<td>Selecting this checkbox indicates that the system will allow users to be waitlisted for this item. If you select the <em>Auto Fill Registration</em> checkbox, waitlisted users automatically replace users who are withdrawn from the scheduled offering.</td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>This field is for admin informational purposes only.</td>
<td></td>
</tr>
<tr>
<td>Closed</td>
<td>If closed, the scheduled offering is over, user registration cannot be changed, and the admin recorded cost (see appendix for more information).</td>
<td></td>
</tr>
<tr>
<td>Cancelled</td>
<td>If cancelled, user registration cannot be changed, and the admin recorded cost (covered in more detail in the Registration lesson).</td>
<td></td>
</tr>
<tr>
<td>Registration Cut-Off Date/Time</td>
<td>The last date and time when a user can change his/her registration status (e.g., register or withdraw).</td>
<td></td>
</tr>
</tbody>
</table>

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### Related Area

The Related area contains additional information regarding the scheduled offering, including registration information, associated catalogs, and segment details (Figure 10).

![Figure 10. Related Area of Scheduled Offering Record](image)

**Managing Registrations**

The Registration tab from the Related area (Figure 11) allows you to:

- Register users for the scheduled offering
- Change users’ registration status
Send email notifications to the user, his/her supervisor, the instructor, and the designated contacts

Add slots (seats for an organization) to the scheduled offering

**Figure 11. Related Area of Scheduled Offering Record: Registration**

**Associating Catalogs**

The Catalogs tab from the Related area of the scheduled offering record allows you to determine which users and supervisors can access the scheduled offering for self-registration. When an item-based scheduled offering is created, it is added to the catalog or catalogs in which the item is currently located.

You may decide not to permit users or supervisors access to the specific scheduled offering by removing all the catalogs from this tab. It may be necessary to remove one or more catalogs from this tab to restrict access to particular users. If removed, a catalog may be returned to this tab; however, a scheduled offering may never be placed into a different catalog than that of the item on which it is based (Figure 12).

**Figure 12. Related Area of Scheduled Offering Record: Catalogs**
**Viewing and Modifying Segment Details**

Scheduled offerings are divided into segments primarily for purposes of resource allocation (building scheduled breaks into the schedule is the other). A scheduled offering must have at least one segment. You can add additional segments or modify the date and time information in existing segments (Figure 13), and add resources to segments.

*Note: Assigning resources is explained in more detail in the next lesson.*

![Figure 13. Related Area of Scheduled Offering Record: Segments](image)

When you modify a segment, the system displays the **Save** and **Cancel** buttons. Click **Save** to save your changes or the system will discard those changes when you access another part of the application.

The calendar view is interactive and displays the day, week, and month views of the schedule. You can easily edit segments by dragging and dropping the segment details box to the new day and time.

You can edit any of the segments for the scheduled offering in list or calendar view, but you must use the list view to copy segments or record attendance for a segment (Figure 14). Click the **List View icon**.
To copy segments, click the **Copy Segments icon** (Fig. 14). To record attendance for a segment, click the **Attendance** link in the Actions column to display the Record Attendance window (Fig. 15). Click the checkbox in the Attendance column and enter any comments as necessary. You can click **Copy to Same Day Segments** to copy attendance information to all segments on the same day. Click **Apply Changes** to save your modifications.

![Figure 14. Segments Tab from Related Area: List View](image)

![Figure 15. Record Attendance](image)
LESSON-RELATED REPORTS

The following are reports in SuccessFactors Learning that relate to this lesson:

♦ Scheduled Offering Data

The Scheduled Offering Data report returns detailed information about each schedule offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

♦ Learning Calendar

The Learning Calendar report returns all the daily learning events scheduled within an entered date range.

CONCLUSION

In this lesson, you were introduced to the main scheduled offering concepts, areas within the record, and the information contained on each. Using the step-by-step instructions, you created a new scheduled offering and entered key information.

You should now be able to:

♦ Define scheduled offering terminology
♦ Create a scheduled offering
♦ Describe the purpose of the main areas (core, related, action) within a scheduled offering

In the next lesson, you will learn how to work with scheduled offering segments and resources.
LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:
   Users, supervisors, and admins are the three groups that may have the ability to register users into scheduled offerings.

2. True or false:
   An admin can be listed on the Contacts tab of a scheduled offering record.

3. True or false:
   A scheduled offering may never be placed into a different catalog than that of the item on which it is based.
4. True or false:
   If you want to display the start and end times of the segments of a scheduled offering in a specific time zone (and not have the system recalculate it and display it to all admins and users in their preferred time zones), you should check the Show in this Time Zone checkbox.

5. A scheduled offering is:
   a) An instance of an item placed on a learning calendar.
   b) An assignable unit that a user must complete.
   c) A grouping of curricula.
   d) None of the above.

6. True or false:
   A scheduled offering must contain a segment.

7. Define the term schedule block.

   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
Your boss has given you the following task:

- Management has decided to offer Item X to the employees.
- Your boss has told you it will be held two weeks from today from 9:00 AM – 5:00 PM.
- She wants this scheduled offering to be viewable to all users.

Use SuccessFactors Learning to perform this task.
Lesson 2: Segments

Once you create a scheduled offering, you may need to update the date/time and change resource allocation. This information is managed under the Segments tab from the Related area of the scheduled offering record.

OBJECTIVES

Upon completion of this lesson, you will be able to:

♦ Modify segments of a scheduled offering
♦ Assign resources to a segment
♦ Record attendance for a specific segment

SEGMENT MAIN CONCEPTS

A segment is a block of time within a scheduled offering primarily used for resource allocation. If a user is registered in a scheduled offering, he/she is registered in all segments. Segments contain any applicable resources (locations, equipment, instructors, etc.) needed for the specified timeframe. Resource assignment to a segment is optional, but each scheduled offering must have at least one segment.

When a scheduled offering is added to SuccessFactors Learning, it is created using the default segment structure from the Segments tab from the Related area of the item record.
RESOURCES ASSIGNED TO SEGMENTS

A segment can have multiple resources of the same type (e.g., two instructors) (Figure 16).

![Edit Segment](image)

Once a resource is assigned to a segment, it is “booked,” and if another admin attempts to schedule the resource during the same timeframe, SuccessFactors Learning alerts him/her that there is a conflict. You can view the conflict and take the appropriate steps to free up that resource or find an alternative.

In order for you to assign a resource to a segment, the resource record must already exist in the SuccessFactors Learning database.
Activity

Using an item that you would schedule, list the resources you will need. How do you currently schedule and track these resources?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
ASSIGNING RESOURCES TO SEGMENTS

SuccessFactors Learning provides the ability to schedule resources for the specific segments (times) in which they are needed instead of scheduling them for an entire scheduled offering. When multiple resources of a single type are associated with the segment, you have the ability to identify the primary resource for each segment. The Add Resources button enables you to assign equipment, materials, and custom resources to a segment.

Assigning Instructors

Once the instructor is identified, he/she can be assigned to the segment(s) within a scheduled offering.

Click Add Resources ( ) and select Add Instructor from the drop-down menu (Figure 17).
SuccessFactors Learning returns all instructors in the search results. The search results include a column that displays the resource availability, which can help when determining the segment resource allocation (Figure 18):

- Not Available
- Available for entire scheduled offering
- Available for current segment
- Blank (when segment information is not available)

![Instructors Table](image)

**Figure 18. Instructor Search Results**

To perform a keyword search and select search filters, select the **Search** tab. Enter your search criteria and click **Search** (Figure 19).
Assigning Locations

When you identify the training location, you can assign it to the segment(s) within a scheduled offering (Figure 20).

Figure 19. Keyword and Filter Search

Figure 20. Segment - Primary Location
To assign locations to segments, click **Add Resources ( )** and select **Add Location** from the drop-down menu. SuccessFactors Learning allows you to search the database for locations that match the type of location the item creator designated. Enter a location type if desired or leave it blank and SuccessFactors Learning returns all locations in the search results (Figure 21).

**Locations**

<table>
<thead>
<tr>
<th>Search Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
<tr>
<td>Case sensitive search:</td>
</tr>
<tr>
<td>Location ID:</td>
</tr>
<tr>
<td>Description:</td>
</tr>
<tr>
<td>Location Type:</td>
</tr>
<tr>
<td>Locations:</td>
</tr>
</tbody>
</table>

**Figure 21. Location Search Window**

**Assigning Equipment**

Equipment is any reusable resource that is used in the delivery of scheduled offerings. These include overhead projectors, television monitors, classroom laptops, etc. Equipment can be associated with locations and facilities. You may schedule equipment that does not come with the location that has been scheduled. To schedule these additional resources, click the **Add Resources** button for the segment in which you want to schedule them (Figure 22).
Resource Conflicts

If you select a resource that is already scheduled for the same time in which you are trying to schedule it, a warning message displays. You can view the conflict and make a decision to continue and schedule that resource or search for and select another (Figure 23).

Regardless of the view you are in (calendar view or list view), any resource conflicts are indicated by the View Resource Conflicts icon (⚠️). Click this icon to view the conflicts.
Lab 2. Assigning Resources to Segments

Step

1. Navigate to Learning > Scheduled Offerings.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click Search.

4. Click the scheduled offering ID link to access the scheduled offering in edit mode.

5. Select the Segments tab from the Related area.

6. In calendar view, double-click the segment you want to assign resources to.

   Note: In list view, click the segment link.

7. For the selected segment, select a primary instructor:
   a. Click Add Resources.
   b. Select Add Instructor.
   c. Click the corresponding checkbox to select the instructor to add for the segment.
   d. Click Add.
   e. Identify the primary instructor and click the corresponding radio button in the Primary column.
   f. Click Save.

   Note: When searching for an instructor, the search screen defaults with the item information entered as search criterion. If you do not remove this criterion, SuccessFactors Learning returns only instructors who are authorized to teach this item.
8. Select a primary location.

9. Click **Save and Close**.

   **Note:** If there are multiple segments and one or more of the segments do not have a primary instructor and/or location designated, the system displays a warning pop-up box. Click **OK** to continue.
Apply to All Segments

In the associated resources area, you can add all of the resources that will be needed to deliver the segment. You can also click Apply to All Segments to copy the resources that you have applied to the segment that you’re modifying to all other segments of the scheduled offering (Figure 24).

If you’re editing an existing segment, then you can click View suggested resource types to review the resources that are identified on the item record (Learning > Items > Segments tab) for the effective delivery of the scheduled offering.

Figure 24. Apply to All Segments
Lab 3. Adding a Second Instructor to a Segment

Step

1. Navigate to Learning > Scheduled Offerings.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1 and click Search.

3. Click the scheduled offering ID link to access the scheduled offering in edit mode.

4. Select the Segments tab from the Related area.

5. In calendar view, double-click the segment you want to add a second instructor.

6. Click Add Resources and select Add Instructor from the drop-down menu.

7. Click the corresponding checkbox to select the second instructor to add for the segment.

8. Click Add.

9. Identify the primary instructor and click the corresponding radio button in the Primary column.

10. Click Save.

11. View all the instructors scheduled to teach during the segment. Note the primary instructor.

12. Click Cancel to return to the calendar or list view.

Note: If you did not click Save, in step 12, click Save and Close to save your changes and return to the segment calendar or list view.

Job Aid: Create Scheduled Offering
ADDITIONAL SEGMENTS

Once a scheduled offering is created, you have the ability to add or remove segments from that scheduled offering. The default segment structure is established through the Segments tab of the item record.

You can add a new segment to the scheduled offering by either clicking the Add New Segments button (Figure 25) or by clicking the Copy Segments icon (Figure 26). The Copy Segments icon is only available in list view.

![Figure 25. Add New Segment to the Scheduled Offering](image)

![Figure 26. Copy Daily Segments](image)
Lab 4. Adding Segments to a Scheduled Offering

Add a New Segment

**Step**

1. Navigate to Learning > Scheduled Offerings.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click Search.

4. Click the scheduled offering ID link to access the scheduled offering in edit mode.

5. Select the Segments tab from the Related area.

6. Click the Add New Segments button.

7. Enter the segment information:
   a. Start date and time
   b. End date and time
   c. Segment description (optional but recommended)

8. Click Add Resources to add instructors, locations, etc.

9. Click Save to save your changes and continue to modify the segment details, or click Save and Close to return to the Segments tab.
Copy Daily Segments

Step

1. Navigate to the segment you just created.

2. Click the List View icon.

3. Next to the segment just created, click the Copy Segments icon.

4. Enter the number of times to copy the segment.

   **Note:** The system is actually copying all segments scheduled on the same date of the segment you selected, not just the segment you selected. This will create each duplicate segment(s) on a different day. You can modify the new segment dates, times, and time zones once they are created.

5. Click Copy.

6. View the new segment(s).

   **Note:** The resources assigned to the original segment are carried over to the new segment(s).

7. Modify the description for each new segment.

8. Click Save and Close.

9. Change the end time of one of the new segments.

10. Click Save and Close.

**Job Aid: Create Scheduled Offering**
**Record Attendance**

Click the Attendance link in the Actions column for any segment of the scheduled offering. The Record Attendance window displays enabling you to record a user’s attendance for that segment (Figure 27).

![Record Attendance](image)

**Figure 27. Record Attendance for Each Segment**

Record the user’s attendance by clicking the checkbox in the Attendance column. You can enter any comments for each user as well. Click **Apply Changes** to save your record.

If the scheduled offering has multiple segments, click **Copy to Same Day Segments** to copy the attendance record and any comments for all users from the current segment to all segments that start on the same day.

*Note: Recording segment attendance is for administrative use only. The system does not store this attendance with the user’s learning history.*
LESSON-RELATED REPORTS

The following report in SuccessFactors Learning relates to this lesson:

♦ Scheduled Offering Data

The Scheduled Offering Data report returns detailed information about each scheduled offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

CONCLUSION

In this lesson, you were introduced to key segment concepts, including assigning resources and adding additional segments to a scheduled offering. Using step-by-step instructions, you assigned instructors and locations to segments and added new segments to a scheduled offering.

You should now be able to:

♦ Modify segments of a scheduled offering
♦ Assign resources to a segment
♦ Record attendance for a specific segment

In the next lesson, you will learn how to set registration parameters and register users for scheduled offerings.
LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. You have just become aware that the scheduled offering times and location have changed. What steps should you take to make the changes and inform all concerned parties?

2. List three types of resources that can be assigned to a segment:

3. True or false:
   If you receive a conflict-warning message, you cannot schedule that resource for that specific time.
Lesson 3: Registration

Now that the scheduled offering is configured, you can register users. In this lesson, you will learn the registration process to register users for scheduled offerings.

OBJECTIVES

Upon completion of this lesson, you will be able to:
- Define the four registration statuses
- Set the registration parameters for a scheduled offering
- Register users for a scheduled offering
- Use the Registration Assistant Tool
- Define and reserve slots for a scheduled offering
- Cancel a scheduled offering

REGISTRATION MAIN CONCEPTS

How a user registers for a scheduled offering is determined on an offering-by-offering basis. If configured, users may self register for scheduled offerings. Supervisors may also be given the ability to register subordinates. Otherwise, admins must register users in scheduled offerings. When users are officially registered and have a status of Enrolled, the system is capable of generating email notifications and sending them to the user, his/her immediate supervisor, the instructor, and any other contact associated with the offering.
A user may have one of the following SuccessFactors LMS defined registration statuses:

- **Enrolled**: The user has a seat in the scheduled offering.
- **Waitlisted**: The user is waiting for a seat to open. (If **Auto Fill Registration** is checked, SuccessFactors LMS automatically registers a waitlisted user when another user cancels/withdraws. SuccessFactors LMS prioritizes the waitlist as first one on the waitlist is the first registered into the offering.)
- **Cancelled**: The user does not have a seat.
- **Pending**: System assigned for users “pending” approval in a SuccessFactors LMS defined approval process.

**REGISTRATION DETAILS**

If a scheduled offering is made available for user self-registration, an approval process may be specified. If so, the user is registered with a *Pending* status until the approver(s) have allowed registration to continue. (See *Multi-level Approvals* guide). If approval is required, indicate in the core area which approval process should be used (select from the **Approval Process** drop-down menu) and if approval is required (select from **Approval Required** drop-down menu) (Figure 28).

![Figure 28. Core Area: Approval Required](image-url)
Click **View All** to display the Additional Settings window and scroll down to the **Registration** section to see the registration details for the scheduled offering (Figure 29).

<table>
<thead>
<tr>
<th>Registration</th>
<th>Email confirmation to the Instructor: No</th>
<th>Email confirmation to the Supervisor: No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Email confirmation to the User: No</td>
<td>Email confirmation to the Contacts: No</td>
</tr>
<tr>
<td></td>
<td>Enable Users to Waitlist: Yes</td>
<td>Maximum Registration: 25</td>
</tr>
<tr>
<td></td>
<td>Minimum Registration: 5</td>
<td>Registration Cutoff Date: MM/DD/YYYY</td>
</tr>
<tr>
<td></td>
<td>Registration Cutoff Time:</td>
<td>Registration Cutoff Time Zone:</td>
</tr>
<tr>
<td></td>
<td>Published Price: 0.00 US Dollar (USD)</td>
<td>Self Registration: Yes</td>
</tr>
<tr>
<td></td>
<td>Auto Fill Registration: Yes</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 29. Scheduled Offering Registration Details**

Set the **Auto Fill Registration** option to **Yes** to enable the system to automatically select and register the next user on the waitlist should a registered user withdraw (or be removed or cancelled by an admin). The user who is listed first on the waitlist is registered first.

If user self-registration is desired, set the **Self Registration** option to **Yes**.

**Note:** Users can self-register only if the scheduled offering resides in a catalog that they have access to.

Also in this section, you configure the minimum and maximum registrants. If self registration and waitlisting are enabled, users attempting to register after the offering is full are prompted to register with a waitlist status. Admins are warned but not prevented from exceeding the maximum registration threshold.

The registration cutoff date and time prevents users from self-registering after the date and time has passed. You can still register users after this date, but you receive a warning message.
Lab 5. Setting Registration Parameters

Step

1. Navigate to Learning > Scheduled Offerings.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click Search.

4. Click the scheduled offering ID link to access the scheduled offering in edit mode.

5. Click View All in the core area.

6. Scroll to the bottom of the Additional Settings window to the Registration section.

7. Set the Enable Users to Waitlist option to Yes.

8. Enter a registration cut-off date.

9. Enter a registration cut-off time.

10. Enter the minimum registrations.

11. Enter the maximum registrations.

12. Set the Self Registration option to Yes.

Note: Setting this option to Yes allows users to register for this scheduled offering from the user interface if the item and scheduled offering are in his/her catalog.

13. Click Save.
REGISTERING USERS

Once it is determined that a user needs to attend a scheduled offering of an item, you have the ability to register him/her for the offering (Figure 30).

![Figure 30. Related Area of Scheduled Offering Record: Registration](image)

Click the **Add To Registration Menu** button (Figure 31). You may search for users using any user search criteria, or select users from the request list for the scheduled item. A request list is available if the admin enabled user requests for the item. It is recommended that you check the request list to see if users have requested to be registered for an offering of the item.

![Figure 31. Add to Registration Menu Button and Options](image)

When adding users to the registration of a scheduled offering, email confirmation checkboxes may be checked in order to notify the user, instructor, supervisor, and any contacts listed on the Contacts tab. Click the **Settings** button (Figure 32).
Figure 32. Scheduled Offering Settings

The default settings of these checkboxes may be configured globally in System Admin > Configuration > Registration Settings. These checkboxes are also available when you withdraw (remove), waitlist, or cancel a user from the registration.

Record Attendance

If attendance is recorded for a segment on the Segments tab (as introduced in Record Attendance on page 40) it will display in the hover window for the registered user. Segment Attendance displays the total segments attended for each enrolled user based on the attendance recorded previously on the segments tab. For example, in Figure 33, the student, Diana, has attended two segments.
Figure 33. Segment Attendance
Lab 6. Registering Users for a Scheduled Offering

Step 1. Navigate to Learning > Scheduled Offerings.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click Search.

4. Click the scheduled offering ID link to access the record in edit mode.

5. Select the Registration tab from the Related area.

6. Click Add To Registration Menu.

7. Select Add Users from the drop-down menu.

8. Enter search criteria to search for users to register for the offering.

9. Click Search.

10. Click the Add checkbox next to each user you want to register.

11. Check the appropriate Email confirmations to: checkboxes for those you want to receive confirmation for this offering (these are at the bottom of the search results page).

Note: It is recommended that you check all boxes. Instructors and supervisors will get one e-mail notification. Supervisors only receive subordinates’ names in the e-mail, while instructors receive everyone registered in the offering.

12. Click Add.

13. View the users who are registered for the offering. Scroll your mouse over each user card to view enrollment details.
WORKING WITH SLOTS

When an organization within a company or agency requests seats in a scheduled offering but cannot provide the names of the individuals who will attend, you can use the slots feature of SuccessFactors Learning. Slots allow you to reserve seats in a scheduled offering without having to register specific users.

Slots are reserved for organizations, enabling only users who belong to the organization to self-register in the slot (if self registration is enabled). If the offering is full, but slots are remaining, users who are not a member of the organization may only join the registration as waitlisted (Figure 34). Admins can register any user against a reserved slot.

![Add Slots](image)

**Figure 34. Add Slots**

Click the **Add To Registration Menu** button and **Add Slots** select from the drop-down menu. Once slots are reserved, the number of open seats decreases by that number. For example, if there are 15 seats available in the class and the admin reserves three slots, 12 seats remain available for other users.
Lab 7. Reserving Slots for a Scheduled Offering

Step

1. Navigate to Learning > Scheduled Offerings.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click Search.

4. Click the scheduled offering ID link to access the record in edit mode.

5. Select the Registration tab from the Related area.

6. Click Add To Registration Menu.

7. Select Add Slots from the drop-down menu.

8. Select an organization for which to reserve the slots.

9. Enter the number of slots to be reserved for the organization.

10. Enter the reservation date (defaults to current date).

11. Enter the reservation time (defaults to current time).

12. Click Save.
**REGISTRATION ASSISTANT**

The Registration Assistant is a tool that helps streamline the process of registering users from the admin side of SuccessFactors Learning. Using the assistant, you may register users, withdraw users, or reserve slots for an organization’s users. Navigate to Learning > Tools > Registration Assistant to access the tool.

This tool can be useful for administrators who have the responsibility of registering users for offerings but don’t have any setup or maintenance responsibilities of the offering itself (Figure 35).

![Figure 35. Learning > Tools > Registration Assistant](image)

*Job Aid: Registration Assistant Tool*
CANCELING A SCHEDULED OFFERING

If a scheduled offering that has been created cannot be delivered, you may choose to cancel it. This process allows you to move any users who are registered with an Enrolled, Waitlisted, or Pending registration status to the request list for the item. Any incurred costs associated with the scheduled offering being cancelled can also be calculated (see the Commerce Management course). Cancelled scheduled offerings that were previously available to users for self registration are no longer available. Click Cancel the Scheduled Offering in the Actions area of the scheduled offering record, or navigate to Learning > Tools > Cancel Scheduled Offering (Figure 36).

Figure 36. Cancel Scheduled Offering Wizard
Lab 8. Canceling a Scheduled Offering

Step

1. Navigate to Learning > Scheduled Offerings.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click Search.

4. Click the scheduled offering ID link to access the record in edit mode.

5. In the Actions area, click Cancel the Scheduled Offering.

6. Leave the default cancellation date and click Next.

7. If the cost is anything other than $0, change the amount $0, click Update Total, and then click Next.

   Note: If there were costs associated to the resources included in the scheduled offering, you will see costs calculated. If necessary, you may modify the incurred costs and click the Update Total button. You will be prompted to add a cost center and profit center code on subsequent pages.

8. On the Post Cancellation Action Settings page, check the appropriate checkboxes to add registered users to the item request list, send email notifications, and/or inactivate the scheduled offering.

9. Click Next.

LESSON-RELATED REPORTS

The following are reports in SuccessFactors Learning that relate to this lesson:

♦ Scheduled Offering Data

The Scheduled Offering Data report returns detailed information about each scheduled offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

♦ Registration Status

The Registration Status report returns, for offerings and users, a detailed list of registration information including registration dates and times, enrollment numbers, instructors, and scheduled offering details.

♦ Scheduled Offering Roster

The Scheduled Offering Roster report returns the roster of users in a scheduled offering.

♦ Slot Status

The Slot Status report returns, for organizations and scheduled offerings, the current status of any slots that have been purchased. Where user names have been identified to fill the slots, the user names are included in the report, along with registration status and schedule information. You can group the report by organization or scheduled offering.
CONCLUSION

In this lesson, you were introduced to registration concepts for scheduled offerings. Using the step-by-step instructions, you learned how to set up the registration parameters, register users for scheduled offerings, and use slots to reserve seats for a scheduled offering. Finally, you learned how to cancel a scheduled offering.

You should now be able to:

♦ Define the four registration statuses
♦ Set the registration parameters for a scheduled offering
♦ Register users for a scheduled offering
♦ Use the Registration Assistant Tool
♦ Define and reserve slots for a scheduled offering
♦ Cancel a scheduled offering
LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:
   All of the user registration options on a scheduled offering are determined within the Registration tab.

2. What are the three registration options available to the admin?

3. True or false:
   You can reserve slots for users who work in a specific job location.
Activity

Your boss has given you the following task:

- We forgot to create and register user for the item X course that you took last week.
- Create a scheduled offering for 7 days ago and register yourself and four other users.
- Record the scheduled offering ID.
Lesson 4: Record Learning Events

After the scheduled offering is complete, you must record learning events for all the participants. In this lesson, you will learn how to record learning events. Recording a learning event creates a Learning History (Completed Work) record for users and allows those users who successfully complete an item to generate a certificate of completion.

OBJECTIVES

Upon completion this lesson, you will be able to:

♦ Define a learning event
♦ Record a learning event for a scheduled offering

LEARNING EVENT MAIN CONCEPTS

Using the Record Learning quick link on the Welcome screen quick links, you may record the completed learning for users.

Note: To return to the Welcome screen and access the quick links as you work in SuccessFactors LMS, return to the Admin Home page and click Home in the button bar.

When you are informed that training has been completed, you can use the Record Learning tool to capture this information. Once the event is recorded, a Learning History (Completed Work for users) record is created that captures the item completed, the date/time it was completed, and the status the user was given. If an error is recorded, you have the ability to edit it with the
Learning Event Editor (if you have been given the appropriate workflow).

A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of attendance or completion of any external event considered important enough to document (but not related directly to learning needs)

Using the Learning Event Recorder, you may choose to record completions for all users registered in a selected scheduled offering. The system does not prevent you from recording completions for those users who were never registered. This is useful for those last minute registrants who were not actually registered in the scheduled offering but did attend. However, it is recommended for you to register users (reconcile the roster) in the scheduled offering even after the delivery date has passed, for reporting purposes.

**TYPES OF LEARNING EVENTS**

There are two types of learning events in SuccessFactors Learning:

- Item-based events
- External events

**Item-based Events**

Scheduled offerings are instances of items placed on a calendar, and therefore recording a learning event for a scheduled offering grants the user a completion status for the item. The benefit for recording against scheduled offerings is immediate access to the
list of all users who were registered in the course, eliminating the need to search.

External Events

An external event is a learning activity, such as a college course or a seminar outside of the organization, for which there is no item record in SuccessFactors Learning and may be recorded in a user’s Learning History. This external event has a description and comment field to further identify the nature of the training.

**DATA RECORDED IN A LEARNING EVENT**

Recording a learning event captures data such as:

♦ User information
♦ Item title
♦ Item status (grade or code)
♦ Completion date/time
♦ One or more electronic signatures (if applicable)
♦ Completion status code (indicates whether or not an item was successfully completed)

Completion status codes may include, but are not limited to, the following list:

♦ Pass
♦ Fail
♦ Attend
♦ Complete
- Waived (used to grant completion based on experience or because the concept or skill is covered in another course)

**ACCESS RECORD LEARNING TOOLS**

There are two recording tools: **Record Learning - Multiple** and **Record Learning - Financial**. Both tools record the same basic information; however, if your organization tracks financials for items and scheduled offerings, select the **Record Learning - Financial** to capture cost information. If your organization does not track costs and financials, select the **Record Learning - Multiple** tool as it will skip the financial steps in the recording process.

The **Record Learning - Multiple** tool can record learning events for multiple items for multiple users as long as the events that you want to record are the same type (for example, all items or all scheduled offerings). You can access the tool in one of two ways:
- Select **Record Learning - Multiple** from the Welcome page (Figure 37)
♦ Navigate to Users > Tools > Record Learning - Multiple (Figure 38).

![Figure 38. Record Learning - Multiple](image-url)
Lab 9.  Record a Learning Event for a Scheduled Offering

Step

1. From the Welcome page, click **Record Learning - Multiple**.
   or
   Navigate to **Users > Tools > Record Learning - Multiple**.

2. Click the **Scheduled Offering** radio button.

3. Click the **Scheduled Offering ID select icon** to search for and select a scheduled offering.

4. Click **Add**. The scheduled offering displays.

5. Search and add users by clicking the **User ID select icon** and click **Add** or click **Auto Fill From Registration** to populate the user list from registered users. The list of users displays.

6. Click **Next**.

7. Click **expand ()** next to the scheduled offering to view all user records.

8. Enter Grade, Completion Status, and Hours next to the title.

9. Click **Apply Changes** to apply to all user records.

10. Make changes as necessary to individual user records and then click **Next**.
    
    **Tip:** Use the information displayed in the Attendance column to help determine an appropriate completion status for each user.

11. Review the summary of the learning history to be recorded by the system and then click **Submit**.
    
    **Note:** The **Start Over** button allows you to repeat the process of recording another learning event for the same set of users.

**Job Aid: Record Learning**
LEARNING HISTORY

The Learning History tab from the Related area of the user record (Completed Work list on user side) is made up of all learning events that have been recorded, either for credit or not for credit. You are able to view (but not change or edit) a user’s history from the Learning History tab of the user record (Figure 39).

![Figure 39. Related Area of User Record: Learning History](image)

Items with Retraining

Select items within a curriculum that must be repeated on a recurring interval will have a retraining assignment. Once the item is complete and recorded (in the user’s Learning History/Completed Work), it is flagged as complete and the next required by date it is due according to the date calculated by the retraining assignment. In this situation, you will see the item on the Learning Plan tab with the new date for completion and on the Learning History tab with the date completed.

Certificate of Completion

A user and his/her training managers can print certificates upon the user’s successful completion of an item. Certificates are generated in .pdf format and open in Acrobat Reader. Certificates are not generated within SuccessFactors Learning for external events.
LEARNING EVENT EDITOR

Learning events can be edited and files may be attached to the record with the Learning Event Editor tool found under the Users > Tools menu. Admins with the appropriate workflows have the ability to edit or delete the learning event records for users.

Note: Costs are discussed in the Commerce Basics course.

An attachment framework is used to provide you with the ability to attach external documents to records in SuccessFactors LMS. For example, if a user completed a course that required a paper-based test at the end, the paper-based test could be digitized (scanned into a PDF or MS Word document using other means) and attached to the learning history record using the Learning Event Editor tool for future reference.

The attachment interface shows all attachments related to the entity. In addition, it allows for additions and removals of attachments. When you click the File Attachments link on the Summary tab of the record (Figure 40), you can browse for a file to attach to the record. It is recommended that you enter a description to more easily identify each file (you cannot modify a description after you upload the file).
If you attempt to attach a file that is of an unsupported type, a validation error displays. If you attempt to attach a file that is larger in size than allowable, another similar validation error displays. These limitations are configured by your system administrator.

Users can access attached files in the user interface by reviewing the completed work details of the recorded item (Figure 41).
Administrators can access the attached files in SuccessFactors Learning from the Learning History Details page of the user record (navigate to the Learning History tab from the Related area of the user record and click the View Details link) (Figure 42).

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LESSON-RELATED REPORTS

The following are reports in SuccessFactors Learning that relate to this lesson:

♦ Learning History

The Learning History report returns users' learning history (learning items and curricula they have finished) with detail item events.

♦ Certificate of Completion for Scheduled Offerings

The Certificate of Completion report prints the certificates of completion for users from their learning history (completed work).

♦ Item Status

The User Item Status report returns, for each user and item, the user's completion status for the items they participated in during the given date range.

CONCLUSION

In this lesson, you recorded learning events for users using the Learning Events Recorder. Using the step-by-step instructions, you recorded completed items and external events.

You should now be able to:

♦ Define a learning event

♦ Record a learning event for a scheduled offering

In the next lesson, you will learn about copying scheduled offerings.
LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. What data can be recorded in a learning event?
   a) Electronic signature
   b) Completion date and status
   c) User information
   d) Item information
   e) All of the above

2. True or false:
   Admins cannot record learning events for users who were not registered in the scheduled offering originally.
Lesson 5: Copying Scheduled Offerings

It can take a long time to set up scheduled offerings one by one. Copying allows you to copy scheduled offerings and assign resource to one or more future dates.

OBJECTIVES

Upon completion of this lesson, you will be able to:

♦ Describe the scheduled offering copying options
♦ Copy a scheduled offering

COPYING A SCHEDULED OFFERING

Sometimes items are scheduled to be delivered multiple times. After the original scheduled offering is created, the copy feature allows you to create duplicates, complete with associated resources and registration parameters. These copies of the original offering can be scheduled to occur once or repeat according to specific scheduling rules. These rules include copying multiple times every ‘x’ number of days, weeks, or months, and can be configured to end after a certain number of scheduled offerings have been created (Figure 43).

Click Copy in the Actions area of the scheduled offering record.
Figure 43. Copy Scheduled Offering

Figure 44 shows available options for creating a single copy of the scheduled offering.

Figure 44. Options for ‘Copy Single’
Figure 45 shows available options for creating multiple copies of the scheduled offering to be held daily.

Figure 45. Options for ‘Copy Multiple-Daily Based’
Figure 46 shows available options for creating multiple copies of the scheduled offering to be held weekly.

Figure 46. Options for ‘Copy Multiple-Weekly Based’
Figure 47 shows available options for creating multiple copies of the scheduled offering to be held monthly.

**Copy the Scheduled Offering**

* Required Fields

Scheduled Offering ID: 4025

Title: Company Benefits Orientation

Start Date/Time: 8/27/2011 08:30 AM America/New York

Options:

- Copy Group Instance
- Copy New Scheduled Offering to the catalog
- Use item default segment day numbers
- Copy to consecutive Days

Copy Single  Copy Multiple-Daily Based  Copy Multiple-Weekly Based  Copy Multiple-Monthly Based

New Start Date: [MM/DD/YYYY] 08:30 AM America/New York

Schedule every [ ] month(s)

- Use the date as the driver to schedule (e.g. 4th, 23rd, etc.)
- Use the day and week as the driver to schedule (e.g. First Wednesday, Last Monday, etc.)

Number of Schedules:

- End after: [ ] schedules
- End after: [ ]

Include Registration Cutoff Date

---

Figure 47. Options for 'Copy Multiple-Monthly Based'
Lab 10. Copy a Scheduled Offering (Multiple-Weekly Based)

Step

1. Navigate to Learning > Scheduled Offerings.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click Search.

4. Click the scheduled offering ID link to access the record in edit mode.

5. Click Copy from the Actions area.

6. Select the Copy Multiple-Weekly Based radio button.

7. Enter a new start date in the New Start Date textbox.

   *Note: Your instructor may direct you to use a date in the past so that one of your copies may be used in a future lab.

8. Enter 1 in the Schedule every ___ week(s) field.

   *Note: The system schedules a new offering every week.

9. Select the End after ___ schedules radio button.

10. Enter 2 in this field.

   *Note: This allows only two new offerings to be scheduled.

11. Check the Include Registration Cut-off Date checkbox.

12. Click Next.

13. On the Confirmation screen, check the Send Notification checkbox.

   *Note: The system sends emails to the contacts listed on the original scheduled offering record.

14. Click Copy. Note the new scheduled offering IDs and start dates.
CONCLUSION

In this lesson, you created copies of a scheduled offering using different copy methods (e.g., daily, weekly, and monthly).

You should now be able to:

♦ Describe the scheduled offering copying options
♦ Copy a scheduled offering
LESSON CHECK

Use what you learned in this lesson to answer the following question.

1. List the different ways you can copy scheduled offerings.
Course Summary

Through lecture, activities, and hands-on computer lab work, this course taught you the concepts and terminology associated with scheduling instructor-led items in SuccessFactors Learning. You gained basic, hands-on experience using SuccessFactors Learning system functions to schedule items and assign resources.

You should now be able to:

♦ Describe the process for creating a scheduled offering
♦ Create a scheduled offering
♦ Assign resources to a segment within a scheduled offering
♦ Register users for a scheduled offering
♦ Reserve slots in a scheduled offering
♦ Record learning events
♦ Copy scheduled offerings
Notes
Scheduling Management Extras

This section provides some extra learning-related topics, including:

- Additional tabs
- Creating resource records
- Closing scheduled offerings
- Working with classes
- Scheduling curriculum

ADDITIONAL TABS

Additional tabs from the Related area of the scheduled offering record include:

- Contacts
- Materials
- Notifications

Click More to see these additional tabs (Figure 48).

![Figure 48. Related Area of Scheduled Offering Record: More Tabs](image-url)
Contacts Tab

The Contacts tab allows you to identify people who should or want to be notified about registrations for this specific scheduled offering. Use either an instructor or user ID. The selected records must have an e-mail address in the record. When Other is checked on the Registration tab when modifying the segment information or registration statuses of users, all contacts associated to this scheduled offering receive a notification (Figure 49).

![Contacts Tab](image)

**Figure 49. Scheduled Offering Record: Contacts Tab**

Materials Tab

The Materials tab allows you to assign materials and designate it as pre or post work for users or instructors. Material records listed here are not seen by users and is not included into scheduled offering cost (Figure 50). Use of this tab requires a user to enter a shipping address when registering if that information is not contained in his/her user record.

![Materials Tab](image)

**Figure 50. Materials Tab: Scheduled Offering Record**
Notifications Tab

The Notifications tab allows you to create a specific message or attach a file to registration status emails for this specific scheduled offering. If the scheduled offering notification is not modified, the item notification defaults are sent to users, instructors, supervisors, and contacts, if these checkboxes are checked (Figure 51).

![Notifications Tab: Scheduled Offering Record](image)

**Figure 51. Notifications Tab: Scheduled Offering Record**
Lab 11. Modify an Offering Notification

Step

1. Select the Notifications tab.

2. Scroll down to the Edit the Registration Notification for the Scheduled Offering section.

3. In the body of the message, add the following text:

   Please bring a Photo ID and notepad to class.

4. Click Apply Changes.
**RESOURCES**

You can set up scheduled offering resources in SuccessFactors Learning. Resources include:

- Instructors
- Equipment
- Equipment Status
- Equipment Types
- Materials
- Facilities
- Locations
- Location Types
- Custom Resources

**Instructors**

Instructors can be internal or external to the organization and are not required to be SuccessFactors LMS users or admins. An instructor record can be associated to a user record, and vice-versa. When creating a new instructor, you may select a related user record to be tied to the instructor record, and from a user record, you may select a related instructor to be tied to the user (Figure 52).

The instructor’s email address field is necessary for system-generated notifications when instructors are added as resources to scheduled offering segments. In addition, when users are registered to take the scheduled offering for which the instructor
is a resource, the instructor can receive email notification of the roster update.

![Instructor Record](image)

**Figure 52. Instructor Record**

The instructor record includes an **Authorized to Teach** tab, which lists items the instructor is authorized to teach. When searching for an instructor to add to a scheduled offering, the search initially filters for instructors who are authorized to teach the scheduled item. You can also add authorized instructors on the **Item > Instructors** tab.
Lab 12. Create and Authorize an Instructor

Create an Instructor

Step

1. Navigate to Learning > Instructors.

2. Click Add New.

3. Enter an instructor ID.

4. Enter the instructor’s last name, first name, and middle initial.

5. Enter the instructor’s company.

6. Select a domain for the instructor.

7. Select an organization for the instructor.

8. Select a time zone for the instructor from the Time Zone drop-down menu.

9. Enter an e-mail address for the instructor.

   Note: Even though this field is optional, it is recommended that you enter an e-mail address so that the instructor receives all scheduled offering notifications.

10. Verify that the Active checkbox is checked.

11. Select Related User, if applicable.

12. Click Add.

Job Aid: Resource Management
Authorize an Instructor to Teach Item

Step

1. From within the instructor record, select the **Authorized to Teach** tab.

2. Click the **add one or more from list** link.

3. Enter keyword to search for the item(s) you want to add to the instructor’s authorized list.

4. Click **Search**.

5. Click the **Add** checkbox next to all items to be added to the instructor’s authorized list.

6. Click **Add**.

7. Verify that all selected items are added to the instructor’s record.
Equipment

SuccessFactors allows you to manage the use of equipment for learning activities in your organization. *Equipment* is any reusable resource that is used in the delivery of scheduled offerings. Navigate to **References > Physical Resources > Equipment** (Figure 53).

Examples of equipment include audio components, overhead projectors, DVD players, computer monitors, etc. Equipment can be associated with locations and facilities (Figure 54).
When an admin schedules an event that requires the use of certain equipment, he/she can also check the status of equipment that is on-site and available for use.

You can edit or create a new equipment status so that administrators can associate equipment with the equipment status to identify the status of the equipment (for example, Operational, On Loan, and Inoperative).
If you select the Can Be Scheduled checkbox for an equipment status, then equipment associated with the equipment status is available for use in a scheduled offering (Figure 55).

**Equipment Status**

Equipment Status ID: INSVGO

Edit the Equipment Status Reference

- Description: In service
- Can Be Scheduled

*Figure 55. Equipment Status*

**Equipment Types**

You can edit and create equipment types so that administrators can associate equipment to the equipment type and then use the equipment type as a filter when searching for specific equipment. Equipment types are defined in the Equipment window. Equipment ID and description are the minimum data required to create a new equipment record in the system (Figure 56).

**Equipment Types**

Equipment Type ID: LCD

Edit the Equipment Type Reference

- Description: LCD Projector

*Figure 56. Equipment Type*
Equipment types are referenced in a few different locations within the system:

- **Item level**
  - **Segments tab**: Default equipment type requirements can be specified for segments of an item.
- **Scheduled offering**
  - **Segments tab of the Scheduled Offering record**: Specific items of equipment can be scheduled.
Lab 13.  Add Equipment

Step

1.   Navigate to References > Physical Resources > Equipment.

2.   Click the Add New link.

3.   Enter equipment ID.

4.   Enter a description for the equipment.

5.   Select a domain for the equipment.

6.   If available, enter a serial number.

7.   Select the equipment type from the Equipment Type drop-down menu.

8.   Select the equipment status from the Equipment Status drop-down menu.

9.   Select an assigned location from the Assigned Location drop-down menu.

10.  If needed, select a facility for the equipment from the Facility drop-down menu.

11.  If needed, enter the contact name.

12.  If needed, enter comments.

13.  Click Add.

Job Aid: Resource Management
Materials

Materials are the actual consumable supplies needed for the scheduled offering that are replenished periodically, such as manuals, handouts, and other non-reusable items that are delivered along with the other aspects of training. Anything the user needs and uses during training or retains after training can be managed as a material by SuccessFactors Learning.

Materials are referenced in a few different locations:

♦ Resources level
  - Materials section: Edit default information for materials, including descriptions.

♦ Item level
  - Materials tab: Quantity, target, and offset can be specified for each material.

♦ Scheduled Offering level
  - Materials tab: The quantities, offset, and target, can be edited and, if necessary, overridden for each scheduled offering of the item. Materials on this tab can be identified as pre-work/post-work.
Lab 14. Add Material

Step

1. Navigate to References > Physical Resources > Materials.

2. Click Add New.

3. Enter a material ID.

4. Enter a description for the material.

5. Select a domain for the material.

6. If needed, enter a revision number.

7. If needed, enter comments.

8. Click Add.

Job Aid: Resource Management
Facilities

You can use the Facility section to monitor and manage facilities in your organization. Facilities are groups of locations. Locations are places where you can assign things to occur, like scheduled offerings, equipment, or materials. Use facilities as a way to group locations together in a method that makes sense to your organization. For example, a building with many classrooms is a facility. Its classrooms can be locations. Or, for example, an industrial complex could be a facility with a training room location, an engineering on-the-job-training location, and a mock-emergency drill site (Figure 57).

Figure 57. Facility Record
**Regions**

Facilities may be associated with regions (geographical areas). Users may also have region attributes (Figure 58), and thereby may search for scheduled offerings local to them (i.e., within their region) (Figure 59).

![Figure 58. User-side > Options and Settings Easy Link](image)

![Figure 59. User-side > Advanced Catalog Search for Local Scheduled Offerings](image)
**Holiday Profiles**

A facility can have designated non-training days (holidays). When you create a scheduled offering at a certain facility, the system checks that facility’s Holiday Profile and issues an alert if the intended scheduled dates include a non-working day (Figure 60).

![Holiday Profiles](image)

**Figure 60. References > Calendars and Time > Holiday Profiles**
**Work Week Profiles**

A Work Week Profile indicates the days of the week training can be scheduled at a facility. If a facility is selected when scheduling an item, SuccessFactors Learning skips the days the facility is not available for training according to the Work Week Profile.

If no Work Week Profile is assigned to a facility, SuccessFactors Learning assumes the training facility is open for business every day of the week (Figure 61).

![Work Week Profiles](image)

Figure 61. References > Calendars and Time > Work Week Profiles
Lab 15. Create a Facility

Step

1. Navigate to References > Physical Resources > Facilities.

2. Click Add New.

3. Enter a facility ID.

4. Enter a description of the facility.

5. Select a domain for the facility.

6. Select a region from the drop-down menu.

7. Select the Holiday Profile from the drop-down menu.

8. Select the time zone of the facility from the drop-down menu.

9. Select the Work Week Profile from the drop-down menu.

10. Click the External Facility checkbox if the facility is external to your organization.

11. Enter any relevant comments.

   Note: This field is for admin informational purposes only.

12. Click Add.

Job Aid: Resource Management
Locations

The location refers to the room where the training takes place. This record can be identified as internal or external to the organization and can be associated with a facility (building).

When you create a location resource, you can determine the maximum capacity for the location (Figure 62).

*Note: The capacity field does not prevent over-enrolling in a room beyond its capacity.*

![Figure 62. References > Physical Resources > Locations](image-url)
Lab 16. Create a Location

**Step**

1. Navigate to References > Physical Resources > Locations.

2. Click Add New.

3. Enter a location ID.

4. Enter a description for the location.

5. Select a domain for the location.

6. Select a location type from the drop-down menu.

7. Select the facility associated with the location from the drop-down menu.

8. Enter the maximum capacity for the location.

9. Enter a contact name and email for the location.

10. Enter any relevant comments.

   *Note: This field is for admin informational purposes only.*

11. Click Add.

Job Aid: Resource Management
Location Types

You can edit and create a location type so that administrators can associate facilities with the location type (for example, auditorium, classroom, and science lab) to identify the kind of location that item training requires.

Custom Resources

Use the Custom Resources section to create and manage resources that are specific to your organization and not already defined in the LMS. A custom resource is any resource that you want to track in your system but does not fit the other kinds of resources such as materials or instructors. You can add and edit base costs and additional costs to custom resources.

Related Reports

The following are reports in SuccessFactors Learning that relate to resources:

- Facility Data
- Location Data
- Location Utilization
- Instructor Data
- Equipment Data
- Equipment Status
- Equipment Utilization
- Material Data
- Resource Conflicts
- Holiday Profile
- Region Data
CLOSING A SCHEDULED OFFERING

After the scheduled offering has been delivered, closing the offering finalizes financial transactions associated with the scheduled offering and prepares them for the Financial Transactions Approval Process (covered in the Commerce Basics guide) (Figure 63). Closing an offering also prevents users from being added to the registration list.

Figure 63. Close Scheduled Offering
Lab 17. Closing a Scheduled Offering*

*Scheduled offerings set in the future cannot be closed. For training purposes, the segments must be entered/changed to past dates to simulate the previous delivery of the offering.

**Step**

1. Add a new scheduled offering with a start date in the past. The system will warn you that you are scheduling in the past.

2. Register users into the scheduled offering.

3. Click Close the Scheduled Offering from the Actions area.

4. Leave the default closing date and click Next.

5. If there were costs associated with the resources included in the scheduled offering, you will see those costs calculated. If necessary, you may modify the incurred costs and click the Update Total button. For this lab, click Next to bypass the Edit Realized Costs step without making changes.

6. Click Finish on the Confirmation screen.

**Note:** The Close Scheduled Offering tool can also be accessed by navigating to Learning > Tools > Close Scheduled Offering.
WORKING WITH CLASSES

A class is a grouping of users who attend scheduled offerings as a group. A class is created for a specific period of time with a start date and an end date. Users who cannot or do not stay current with their class can be moved to another class or removed all together.

For example, a group of employees are identified as a class and go through a series of management training courses together, or a group of new hire electricians all take the same basic series of courses as a class before being split off into their respective specialty areas.

Adding a Class

When the need for a class is identified, an admin creates a class record in SuccessFactors Learning and assigns a curriculum to the class. Once a user is added to this class, the items in the assigned curriculum display on his/her individual Learning Plan/To-Do List. If a user is removed from the class, the curriculum is no longer assigned to him/her; however, any item in the user’s Completed Work is not affected.

Main Class Fields

When creating a class, you should populate some key fields if the information is available:

- Curriculum: The curricula entered in this field are assigned to all users in the class. This provides another method to have curricula automatically assigned to users. If a user is removed from the class, the curricula are no longer assigned to him/her.
- **Start/End Dates:** Indicates to admins when a class is scheduled to begin and end. If the admin attempts to register the class for a scheduled offering outside this date range, he/she receives a warning message. Entering dates is optional.
Lab 18. Adding a Class

Step
1. Navigate to Learning > Classes.

2. Click Add New.

3. Enter a class ID.

4. Enter a description for the class.

5. Select a domain for the class.

6. Select a curriculum, if applicable.

7. Enter the maximum size (number of users) for the class.

8. Enter a start date.

9. Enter an end date.

10. Click Add.

Job Aid: Manage Classes (Cohorts)
Users Tab

The Users tab of the class record allows you to add users to the class. You can also assign a status code, move a user to another class, or enter comments for individual users (Figure 64).

Register Rules Tab

The Register Rules tab (Figure 65) allows you to set the default registration status for users automatically registered in scheduled offerings associated with the class. You may also set whether the user is to fill an organization’s slot in a scheduled offering, if there are slots reserved. If an organization is using the Commerce functionality, you can set up the chargeback defaults. This tab is also where the notification rules are checked for email delivery upon registration for a scheduled offering.
Figure 65. Learning > Classes > Registration Rules Tab

Offerings Tab

The Offerings tab allows you to add an existing scheduled offering to the class and auto register users. Any users added to the class later are also registered in the scheduled offerings listed. If the notification rules have been checked to deliver emails, the user
and his/her supervisor will receive email notifying them of the registration (Figure 66).

![Figure 66. Learning > Classes > Offerings Tab](image)

### Classes

**Search:**

- Search > Search Results > Edit Scheduled Offerings

**Class ID:** FCW001

**Description:** FCW New Employee Boot Camp Class 001

### Edit the Class

**Add a Scheduled Offering to the Class**

Enter Scheduled Offering ID or add one or more from list.

- **Scheduled Offering ID:**
- **Auto Register**
- **Add**

### Update the Scheduled Offerings for the Class

**View:** Current and Future Scheduled Offerings

- **Apply Changes**
- **Reset**

<table>
<thead>
<tr>
<th>Scheduled Offering ID</th>
<th>Item</th>
<th>Description</th>
<th>Start Date/Time</th>
<th>Auto Register</th>
<th>Remove</th>
</tr>
</thead>
</table>
Lab 19. Setting up a Class

Add Users to the Class

Step
1. Access in edit mode the class created in Lab 18.
2. Select the Users tab.
3. Click add one or more from list.
4. Enter search criteria to search for users to be added to the class.
5. Click Search.
6. Click the Select checkbox next to all users to add to the class.
7. Click Add.

Note: You may add a new user record by clicking the Create and Add New User button.
8. Verify that all selected users are part of the class.
Set Registration Rules for the Class

**Step**

1. Select the Register Rules tab.

2. Select the Registration Status from the drop-down menu.

3. Check the Slots checkbox.

4. Click the No charge radio button.

5. Uncheck the Learning Plan checkbox in the Withdraw Rules section.

6. Check all notification checkboxes in the Notification Rules section.

7. Click Apply Changes.

Add Scheduled Offerings to the Class

**Step**

1. Select the Offerings tab.

2. Click the add one or more from list link.

3. Enter search criteria to search for the scheduled offering you want to add to the class.

4. Click Search.

5. Select the Auto Register and Add checkboxes next to each offering you want to add to the class.

6. Click Add.
Related Reports

The following are reports in SuccessFactors Learning that relate to classes:

♦ Class Data

The Class Data report describes a class, including the learning items, curricula, and offerings associated with the class, the users in the class, and other class attributes.

♦ Class Location

The Class Location report returns the locations associated with a class, such as the location of scheduled offerings associated with a class.

♦ Class Progress

The Class Progress report returns the progress of users in a class toward completion of the class's learning.
SCHEDULING A CURRICULUM

The items in a curriculum can be scheduled all at once using the Curriculum Scheduling feature. In order to schedule a curriculum, the items within the curriculum must be sequenced. SuccessFactors Learning places each item on its own day according to the sequence. Once the scheduled offerings are created, they can be modified prior to registering users by accessing each scheduled offering and editing the segment information. The new scheduled offerings can be added to a class, and users in the class can be registered by checking the Auto Register checkbox inside the class record.

Sequencing Items

Prior to scheduling a curriculum, the items must be sequenced from within the Edit window of the Contents tab of the curriculum record (Figure 67). You can adjust the sequencing of the content by clicking the Move Up (▲) or Move Down (▼) buttons.

Figure 67. Learning > Curricula > Contents Tab: Edit Screen
Associating a Scheduled Curriculum to a Class

During the curriculum scheduling process, you may associate all the scheduled offerings created for a class. At the end of the process, you will be able to go to the class record and register users into the offerings (Figure 68).

Figure 68. Scheduling Curriculum and Adding Offerings to the Class
Lab 20. Scheduling a Curriculum and Adding to a Class

Step


2. Search for and select the curriculum to schedule.

   *Note: The curriculum’s instructor-led items must be sequenced.*

3. Click Next.

4. Enter a start date.

5. Enter a start time.

6. Select a domain.

7. Check the Send Notification checkbox.

8. Check the Add the Schedule Offerings to a Class checkbox.

9. Click Next.

10. Search for and select a class ID.

11. Click Next.

12. Verify all information is correct and click Finish.

13. Click Go to Class....

14. Select the Offerings tab.

15. Check the Auto Register checkbox for each offering.

16. Click Apply Changes.