Success Factors
Learning Management System

Introduction to LMS

- LMS Stands for Learning Management system.
- LMS is Cloud solution for Learning/Training module Of Sap HCM.
- LMS is a stand alone system and has its own direct link from success factors login.
- Quick basic key terms in LMS : Item, Curriculum, Scheduled Offerings, Registrations, Domains, Users etc.

Topics to be Covered

- Introduction to Success Factors
- Introduction to LMS
- System Overview – Basic Navigations
- LMS Administrator
- LMS End User and Manager.
- LMS Configurations
- Reports in LMS

Learning Management System – Process

- Identify Learning needs of Organization
- Capture Learning needs of organization in to System
- Assign the Learning Needs to prospective employees
- Capture tuition fees and costs associated with trainings.
- Register for trainings and get approval from management.
- Conduct trainings Internal and external to organization
- Asses trainees by exams.
- Record attendance for employees and provide the course completion certificates.
- Receive feedback on Trainings , Instructors , materials etc.
- Conduct recurring trainings round the year.

Pre- Requisites

- Provisioning
- Bizx Instance
- SFTP Credentials
- Super Admin – LMS for client (Separate for Test , Development, and Production) , Raise the request via Partner Edge
- iContent Server Credentials - 25 gb
- Support Portal

Roles

- End User
- Manager
- Administrator (Types of Admins)
- Instructor

Steps sequence - Project

- Provisioning -> Click on Company Name -> Company Settings
- Enable Learning
- Create Super Admin
- Login in to Bizx Instance
- Make Yourself as Super admin : Home -> Click on Admin Centre -> Click on Manage role based permission -> Add the username s

Integrate SF Bizx and SF LMS

- Login in to Bizx using the Super admin created in Provisioning
- Click on admin center
- Set User Permissions - > Manage role based permission access.
- Adding the user

Set User Permissions -> Manage Roles

- Create Roles
- Add permissions to role
- Create Groups
- Assign Users to Groups
- Assign Groups to Roles.

Login Screen

1

Enter the URL into your browser and hit your **Enter** key or click **Go**.

The SuccessFactors log in screen displays (Figure 2).

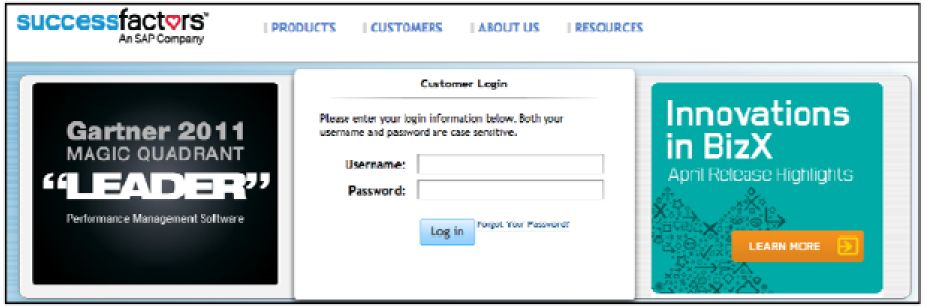


Figure 2. SuccessFactors Login Screen

2

Enter your username and password and click **Log in**.

The SuccessFactors Home page displays (Figure 3).

Figure 3. SuccessFactors Home Page

Login Screen…Cont

3 Click your name (in this case, **Admin User (admin)**) and select Admin from the drop-down menu.

The Administration Tools page displays (Figure 4).

Figure 4. Administration Tools

4 Click **Learning** and select **Learning Administration**.

Login Screen…Cont

5 SuccessFactors Learning Administration opens in a new browser window (Figure 5).

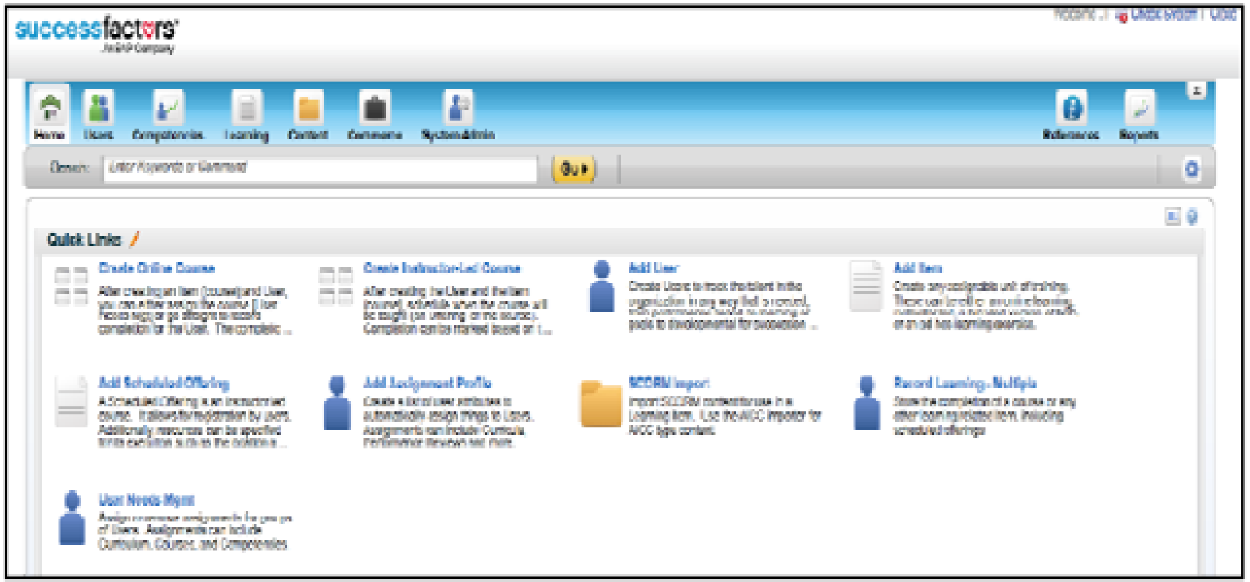


Figure 5. SuccessFactors Learning Administration

LMS - Standalone System Sign On

1

Enter the URL into your browser and hit your **Enter** key or click **Go**.

The LMS login screen displays.

Figure 6. SuccessFactors Learning Login Screen

2

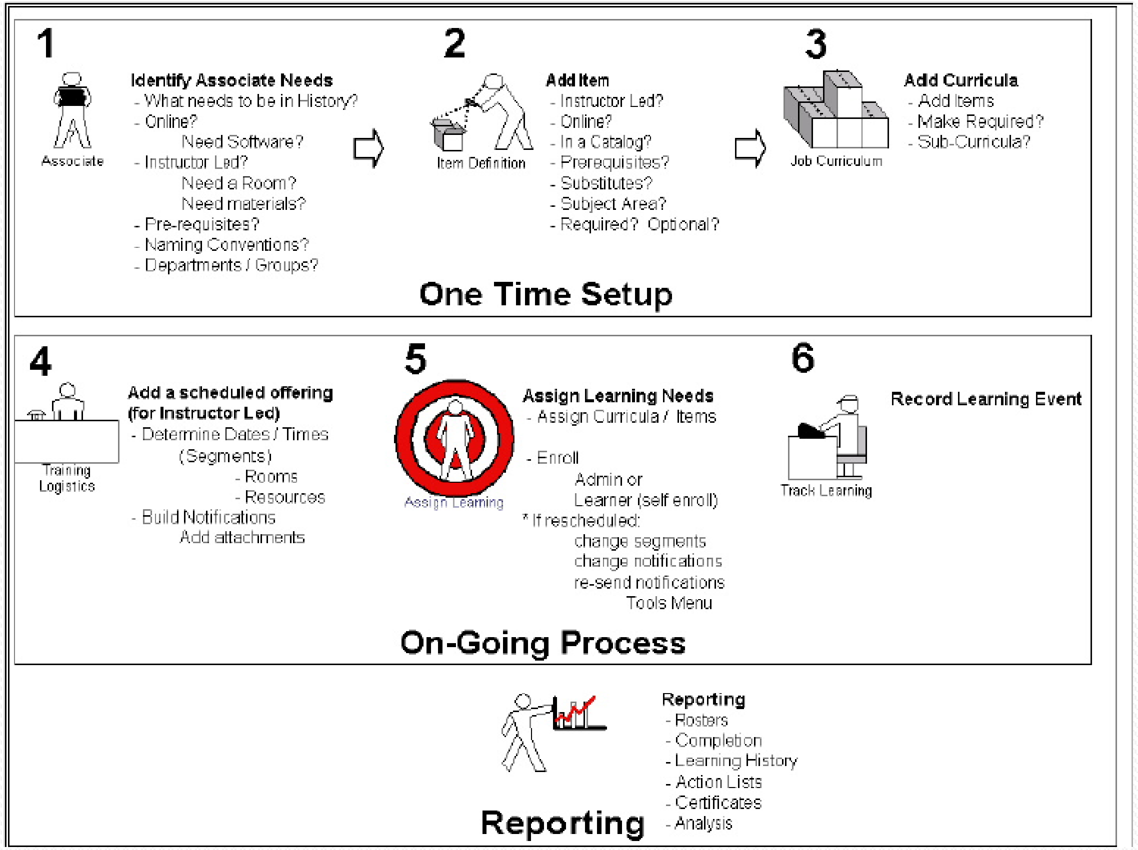
Enter your Admin ID and password.

The LMS Welcome screen displays (Figure 7).

Figure 7. LMS Welcome Screen

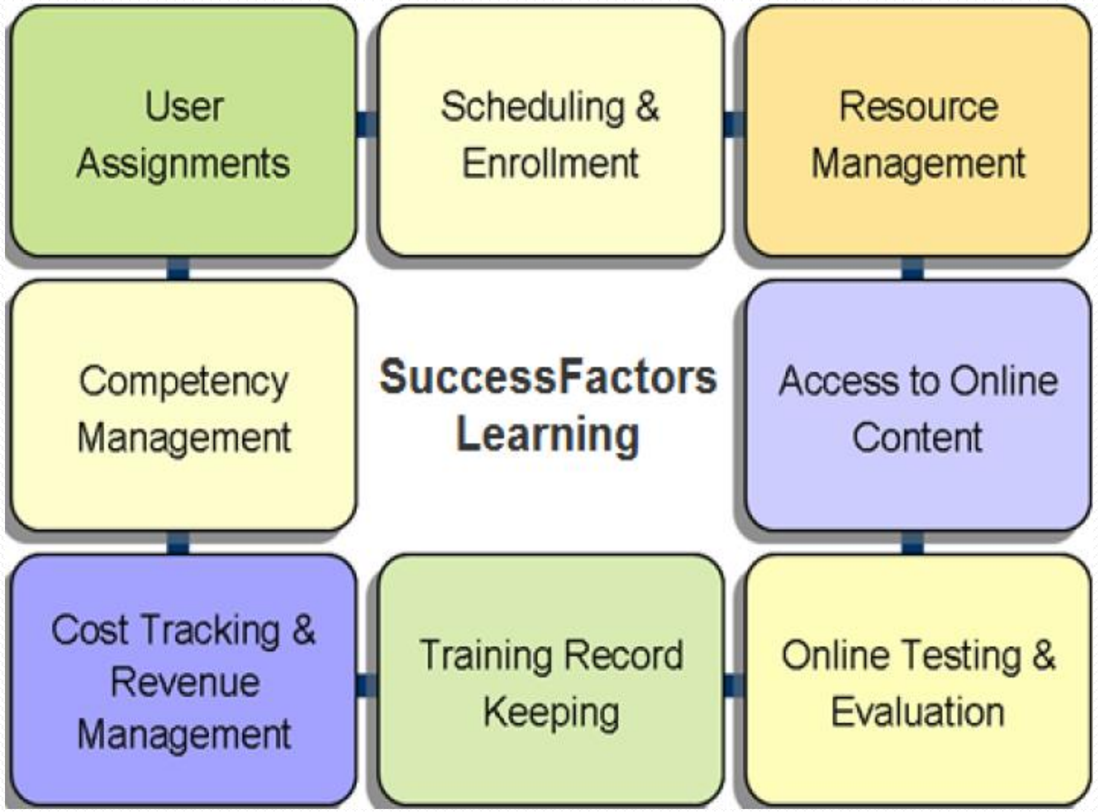
Learning Needs Management Model

Step	Action
1	Identify learning needs (outside SuccessFactors Learning).
2	Add items in SuccessFactors Learning.
3	Add curricula in SuccessFactors Learning.
4	Assign learning needs to users.
5	Record learning events.



LMS Administrator

- User Management.
- Learning Management.
- Online Content Management
- Resource Management.
- Security Management.
- Report Management
- Commerce Management.



Success Factors LMS
Learning Management Workflow

Step 1 – Enable Learning Integration in Provisioning

☑ Enable SuccessFactors Learning integration

SuccessFactors Learning Integration URI https://partner0335.scdemo.successfactors.com

SuccessFactors Learning Integration API URI https://partner0335.scdemo.successfactors.com

☐ Enable granting SuccessFactors Learning roles to permission groups – requires "Role-based Permission (This will disable Administrative Domains)" and "Enable S

Step 2 – Integrate SF Bizx AND SF LMS

Item

An item is an assignable unit that can be tracked in the SuccessFactors Learning system. It may be a learning or non-learning activity.

- Item Types
- Item Classification
- Attributes of an Item
- **Domain Of an Item can Never be Public**
- Item SCREEN – Core , Related and Actions

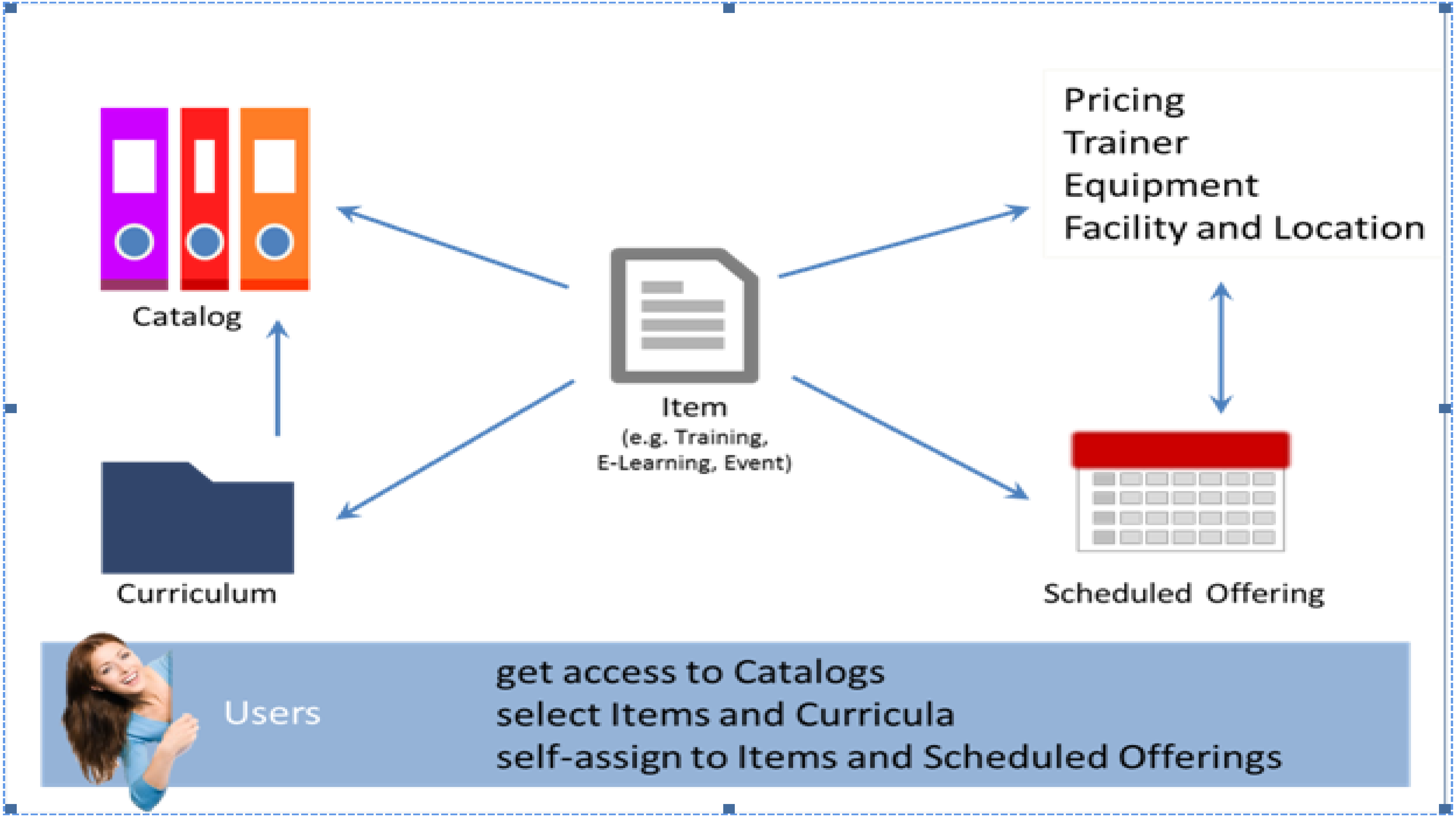
Item Key

First, an item key needs to be established. The item key is the unique identifier in the database and is made up of three parts:

- **Item type (reference):** This is a globally defined reference that helps categorize items. When you create a new item, you must choose from the defined list. Subsequently, each “type” has an associated “completion status.” This is an admin-defined reference used when recording a learning event.
- **Item ID:** This is a unique identifier for each item within the SuccessFactors Learning database. It is recommended that a standard ID naming convention be applied to items and all records in the system. Item IDs can also be auto-generated by the system if the configuration is enabled.
- **Revision date/time stamp:** The system will default to the current date/time and version 1. The admin can manually override the data in these fields as needed.

Some examples of item keys include:

- COURSE Safety-100 07/01/2004 10:15 AM EST
- OJT Mechanic-210 07/03/2004 12:22 PM CST
- EXAM OSHA-230 07/15/2004 1:35 PM PST


Pricing
Trainer
Equipment
Facility and Location
Catalog
Item
(e.g. Training, E-Learning, Event)
Curriculum
Scheduled Offering
Users
get access to Catalogs
select Items and Curricula
self-assign to Items and Scheduled Offerings

More Info Item

- Items represent all the different types of training measures.
- Depending on the item type related data have to be added with the item (e.g. Instructors, Equipment, Facilities and Locations to Courses; Online Contents to Web Based Trainings)
- Item Title, Description, Item Goals and Audience have to be maintained in the system languages.

More Info Item

- Item records can be related with other objects in TrainM (e.g. Catalogs, Scheduled Offerings and Curricula).
- Users get access to items only by the related catalogs

More Info Item

- Item records belong to one Domain, Domains represent a training provider. Domain of an Item should never be Public.
- Depending of your user profile in LMS you can either edit or display items. The user of this example (Admin TrainM (10005016)) got writing access authority for domain DE_CORP_BTC-DE. For items in domain CORP_BTC this user got read-only access.

Item Types

- **Scheduled Only** (items of this type can be Classroom courses)
- **Online Only** (items of this type can be Web-based tutorials)
- **Scheduled and Online** (items of this type can be Blended Learnings)
- **Other** (not used at BOSCH TrainM)

Item Classification

- Course
- WBT
- Webinar
- DOC
- DOC- A

Attributes of an Item

- Item Title
- Item Description
- Approval Process
- Assignment Type
- Minimum and Maximum Registration
- Item Revision date , Number , Time.
- Delivery Methods
- Item Source
- RB Know How

Creating a NEW Training Item

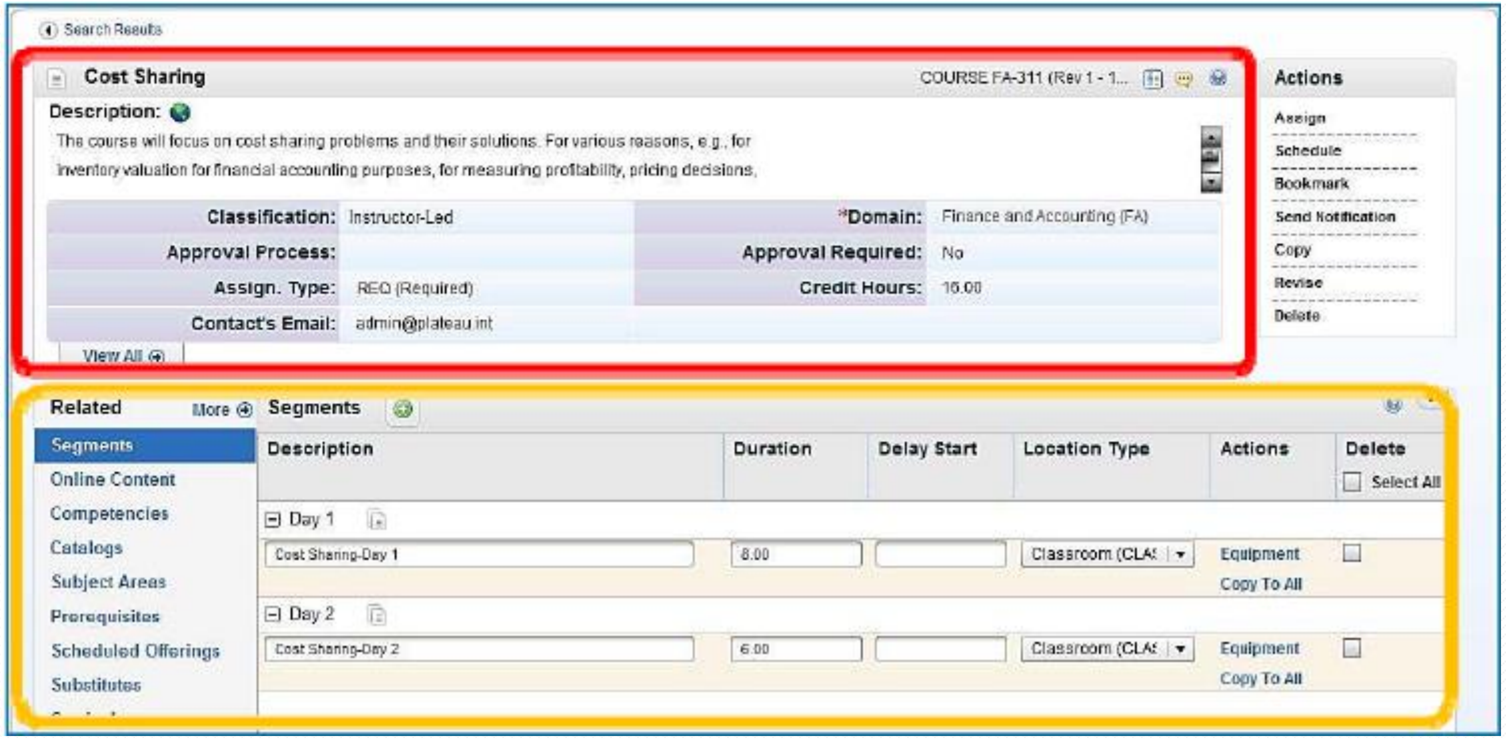
Lab 1. Adding a New Item

Step	Action
1	Navigate to **Learning > Items.**
2	Click **Add New**.
3	Click to select the item type, **Scheduled Only**. The plus sign changes to a checkmark.
4	Click **OK**.
5	Select an item type from the drop-down menu.
6	Enter an item ID.

Creating a NEW Training Item

Login as Admin
Click on Learning
Click on Entity Item
Click on Add New

Parts of an Item – Item View in LMS



How do I maintain Additional Settings of a new created Item

Additional Information Maintenance

How do I maintain Additional Settings of a new created Item (Step 2 - View All)?

Introduction:

Creating new items in TrainM is done in several steps:

- step 1: add new item (maintaining core data on the **Summary** tab)
- step 2: maintain **Additional Settings** via **View All**
- step 3: maintain all the language related data / information (title, description, item goals, audience)
- step 4: maintain **Related** data (Catalog, Subject Areas, etc.)

With this learning session the additional data will be added to complete the core data on the **Summary** tab (step 2).

1 Item Overview Screen

With step 1 you learned how to create a new item. After clicking the **Save & Exit** button the new item was saved and you returned to the item overview screen. The automatically generated Item-ID is displayed on this screen. The next step is to maintain additional settings of the created item.

How do I maintain Additional Settings of a new created Item …cont

Lab 2. Adding Information to an Item's Core Area

Step	Action
1	Using the item created in Lab 1, click the **Assign. Type** field and select **Required (REQ)** from the drop-down menu.
2	Click **Save**.
3	Click View All.
4	In the Summary section: Click the **Source** field and select **Internal (INT)** from the menu. Click the **Enable User Requests** field and select **Yes** (if not already selected by default).

How do I maintain Additional Settings of a new created Item …cont

- Min Registration
- Max Registration
- Auto Fill Registration
- Enable Users to waitlist
- Self Registration
- Supervisors Registration
- Users Can Record Learning events
- Supervisors can record learning events
- Enable User Requests
- Initial Number, Period , Type (Due date calculation)
- Retraining Period , Number, Type

How do I maintain Additional Settings of a new created Item ...cont

- Contact Email
- Target Audience
- Item Goals
- Comments
- Delivery Method
- Item Source
- Approver
- Approved By
- Approved Date
- Enable User ratings

Core AREA

Core Area

The core area contains the basic information of the item record, including the item title, item key, description, and classification. To edit any field in this area, click in a displayed field and enter text or select a reference value (depending on the field type). You can also view and enter additional information by clicking View All located at the bottom left of the core area. Once expanded, the screen displays the following sections where updates can be made:

- Title
- Description
- Summary
- Extended Summary
- Design
- Process Control

How do I maintain Language related Data of an Item

- Item Title and Item Description
- How
- Why

Related and More Area … CONT

- Pricing.
- Notifications.
- Requests.
- Evaluations.
- Chargeback.
- Instructors.

Scheduled Offerings	View future scheduled offerings of the item.

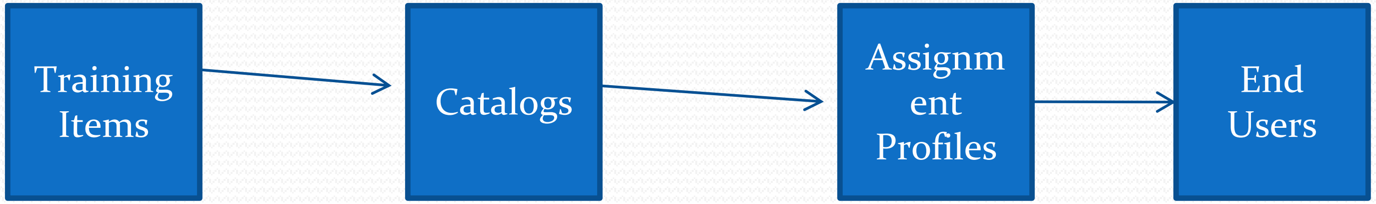
Available under More →	
Evaluations	Associate User Satisfaction, Mastery of Content, and Application of Learning evaluations.
Instructors	Associate and view the instructors authorized to teach the item.
Notifications	View/modify the Learning Expiration notification settings and view/modify the registraion email templates.
Objectives	Associate objectives associated to the item.
Requests	View/add user requests for the item.
Profit centers	View the purchasing options and the account codes that act as the default profit center if a user's account is charged for the training.

After Creating Training Item

Create Schedule Offering ?? -> How ? What all are associated with SO ?

Make the Training AVIALABLE to end user to start receiving registration requests.

Catalog to Assignment profile is 1 : 1 at least.



Catalogs

- What is Catalog Used for ?

Catalog is used for making items available in different way for different end users.

- How to associate catalog to training items
- How to add new catalogs
- Pricing on catalogs

Catalog…Cont

Lab 5. Adding an Item to a Catalog

Step	Action
1	Using the item created in Lab 1, select the **Catalogs** tab in the Related area.
2	Click the **Add New Catalogs** icon.
3	Enter the keyword, **KSO**, and click **Search**.
4	Click the **Add** checkbox next to the KSO-GEN catalog.

Catalog…Cont

Note: The **Add Schedules** checkbox should be checked if you also want to add all existing scheduled offerings to this catalog.

5	Click **Add**.
6	Verify that all selected catalogs are displayed.

Catalog…Cont … Pricing

- Pricing AT Item level
- Pricing at Item level – catalog Level
- Pricing at scheduling offering level
- Pricing at scheduled offering – Catalog Level
- Charge back

Catalog...Cont

Create Catalog:

Login as Admin
Click on Learning
Click on Catalog
Add New
Provide CATALOG ID AND Description
Create New

Create Assignment Profile

- Step 1: Login as Admin
- Step 2: Click o Users
- Step 3: Click on Assignment Profiles
- Step 4: Click on Add New
- Step 5: Provide id and Description
- Step 6: Click on create
- Step 7: Click on Manage rule
- Step 8: Select Domain and SET RULES using employee user attributes
- Step 9: Save and Preview users
- Step 10: Propagate and recheck for users in preview under actions area of Assignment profile.

Approval Process and Approval Roles

- Standard Role (E, EM , EMM, EH, I)
- Hard Core User
- Relational Role (Control Entity : Organizations / Domains) .

Approval Process - > Approval Steps -> Approval Roles

- SF LMS Admin Training – Test Training Item
- Internal Training Approval Process – Test Approval process
- Approval Roles

    Supervisor Level 1

    Budget Approver

    Finance Head

Test Data

Org Unit : IT

Test User : ABNDELK Test User's Supervisor:

Test Catalog: Accounts pAyable , Test AP:Accounts Payable

Test Finance Head : TODADAIR

Segments ON Item Level

- Add and Manage Segments
- How to add equipments and Location on segment level.

Segments … Cont

Working with Segments

The Segments tab of the item contains the default segments added when the item was created. A segment is a block of time within a scheduled offering (scheduled session of an item). The defaults are used to build out the actual training schedule when the item is scheduled in the LMS. At the item level, you can indicate the day, duration, delay start (of a segment), location type, and equipment needed for each segment. Once a scheduled offering of the item is created, a specific start date, start time, instructor, training location, and specific equipment can be indicated for each segment.

If new default segments need to be added to an existing item, click the **Add New Segments** icon () to add the new segments. Existing segments can also be modified if needed.

Segments … Cont

Lab 3. Working with Item Default Segments

Step	Action
1	Select the **Segments** tab in the Related area.
2	In the **Segments** section: Enter a description for each existing segment. Change the duration of segment 2 to **4** hours. Click **Save**.
3	Click to add a new segment and enter the following: Day: **3** Description: **Final Review** Duration: **4** (hours)
4	Click **Save.**

Segments … Cont

Subject Areas

Adding Subject Areas to an Item

Users have the ability to browse catalog/s by subject area. An item can be associated with one or more subject areas. If an item has a subject area and is available to a user through the catalog, the subject areas display on the Browse Catalog page. The subject area titles may exist in multiple languages; users will see the language of their locale.

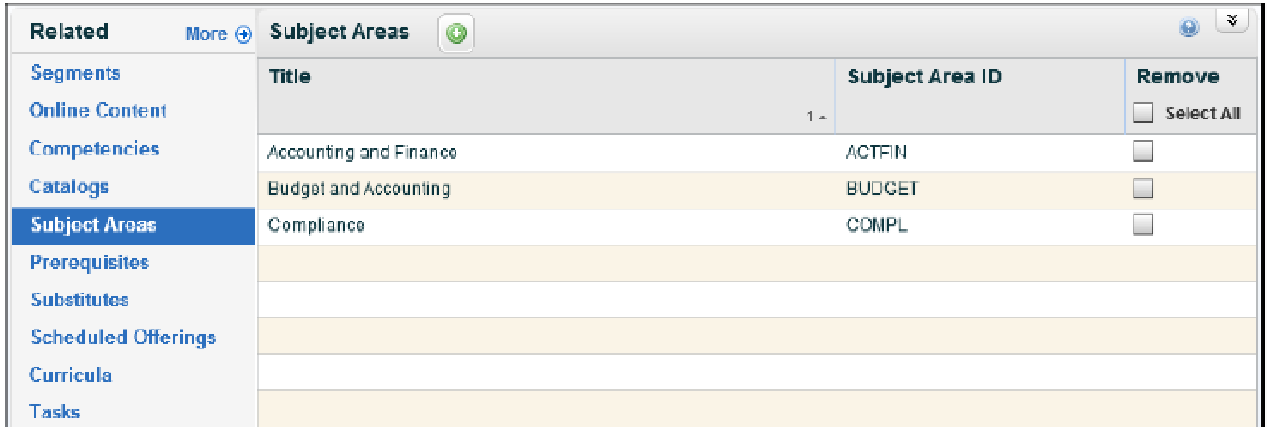


Figure 5. Related Area of Item Record: Subject Areas

Subject Areas

- Within Subject Areas there exist 3 categories: **Competency field**, **Training provider** and **Functional Areas**.
- If possible add always values of all the 3 categories to the item, so that users can find items by this search key.

Subject Areas...CONT

Lab 6. Adding Subject Areas to an Item

Step	Action
1	Using the item created in Lab 1, select the **Subject Areas** tab in the Related area.
2	Click the **Add New Subject Areas** icon.
3	Enter the keyword information. For this lab, **enter Information Technology.**

Assignment VS Registration

Types OF Assignment :

- Self Assignment
- Supervisor Assignment
- Admin Assignment (Manual Assignment)
- Automatic Assignment
    - Assignment Profiles
    - Job Code Based Assignment

Registration :

- Self Registration
- Supervisor Registration
- Admin Registration/ Slots (Advanced Booking)

Instructor

- How to add instructors
- Who is primary Instructor.

Scheduled Offering

- What is a Scheduled Offering?
- How to create a SO for an Item.
- Attributes of a SO
- Registrations on a SO
- Item Requests
- Related More Area of a SO

Prerequisites , Substitutes

- Prerequisites

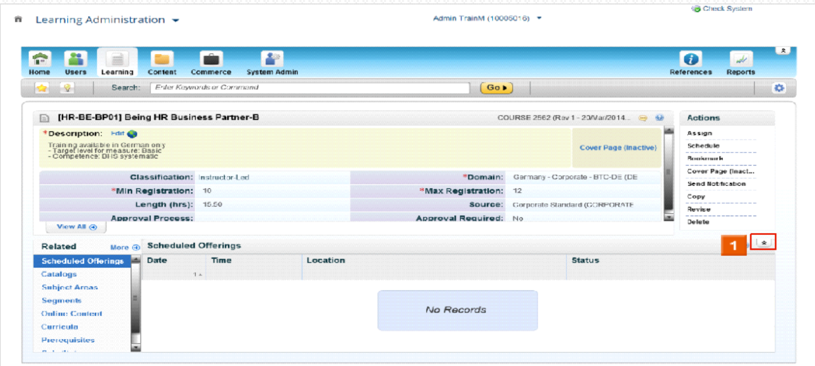
How do I specify Prerequisites for attending a Course?

Introduction:

On the Prerequisites tab, you can identify one or more prerequisite items that users should complete before they can self-register for a scheduled offering of this item.

1 Item Record - SuccessFactors Administration

- If users do not complete each **Prerequisite**, then they can still request a scheduled offering of this item but **cannot** self-register for the item in any of their available catalogs. If users attempt one or more **Prerequisite** items but do not pass (or if users pass an item that grants a substitute for one or more **Prerequisite** items), then the system warns (but does not prevent) you from registering the user for a scheduled offering of this item.
- **Curricula** can be identified as **Prerequisite** as well!



1 Click the **Click to expand the Related region** ( ) button.

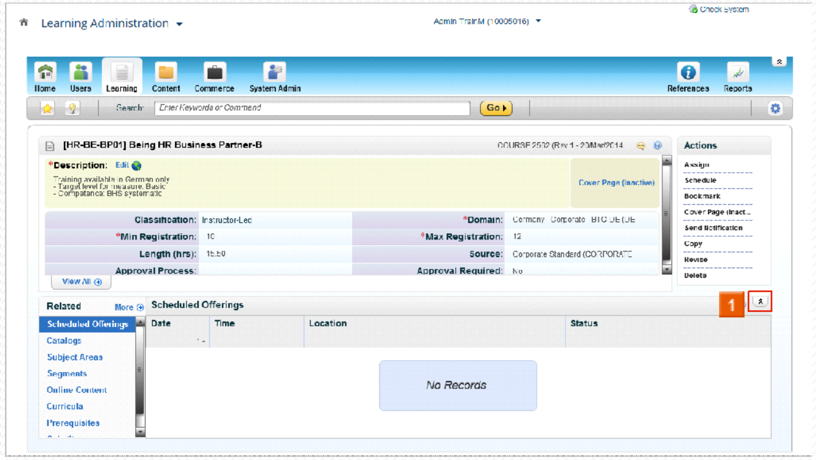
- Substitutes

How do I specify a substitute for an Item?

Introduction:

On the Substitutes tab, you can identify one or more **Substitute items** that users can complete to receive credit for **this** item.

1 Item Record - SuccessFactors Administration



1 Click the **Click to expand the Related region** ( ) button.

Adding an Instructor

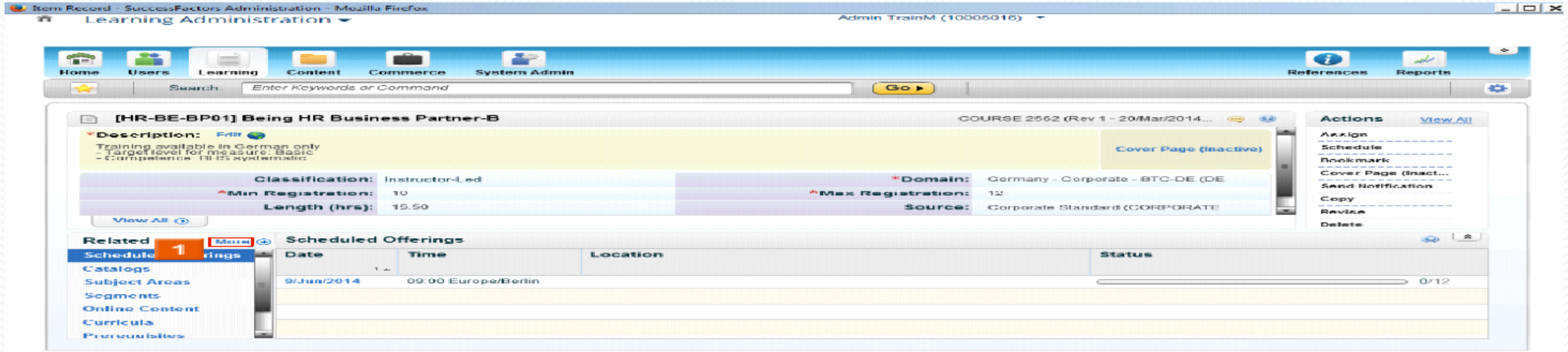
Adding an Instructor

How do I add an authorized Instructor to an Item?

Introduction:

On the item's Related More --> **Instructors** tab can be authorized / preffered instructors linked with the item.

The primary purpose of authorizing an instructor to teach an item is to make it easier for other administrators to select an instructor for the **Primary Instructor** box of a scheduled offering record (Learning>Scheduled Offerings>Segments tab). If an administrator inserts or selects an instructor who is not authorized to teach the item in the **Primary Instructor** box, then the system warns (but does not prevent) the administrator from selecting an instructor who is not authorized to teach the item. You can authorize an instructor to teach an item in two places: on the item record (Learning>Items>Instructors tab) or the instructor record (Learning>Instructors>Authorized to Teach tab).



1 Click the **Related More** (More) hyperlink.

Notifications

Item Request

- How to check Item Requests as a Admin
- How to raise a request for a Item from user, manager and Admin perspective.

Introduction

Identifying how many employees has requested a Scheduled Offering needs 4 steps:

- Searching for the needed Item.
- Check the minimum number of registrations in the Item.
- Check the number of employee's requests.
- Check the number of still bookable seats and the delivery date of available Scheduled Offerings.

The following session shows you the procedure to identify the number of employees requested a Schedulde Offering.

1 Searching for the needed Item

The documentation and the system simulation at hand provide only the approach to identify the number of employees requested for a Scheduled Offering is associated with through an example. For the practical realization in the productive system you have to use the according data, values or factors.

Items will be maintained on the **Learning** view of TrainM. Change to the **Learning** view to search for and open the needed Item.

Registration

- Available Registration Statuses.
- Pending , Enrolled, Withdrawn, Waitlisted.
- How to do Registration for a Training Item.
- How to withdraw from a Registration.
- Admin registration.
- Notification Emails.

Admin Registration

- **How do I enroll Users to a Scheduled Offering who did not request the Course?**

How do I enroll Users to a Scheduled Offering who did not request the Course?

Introduction:

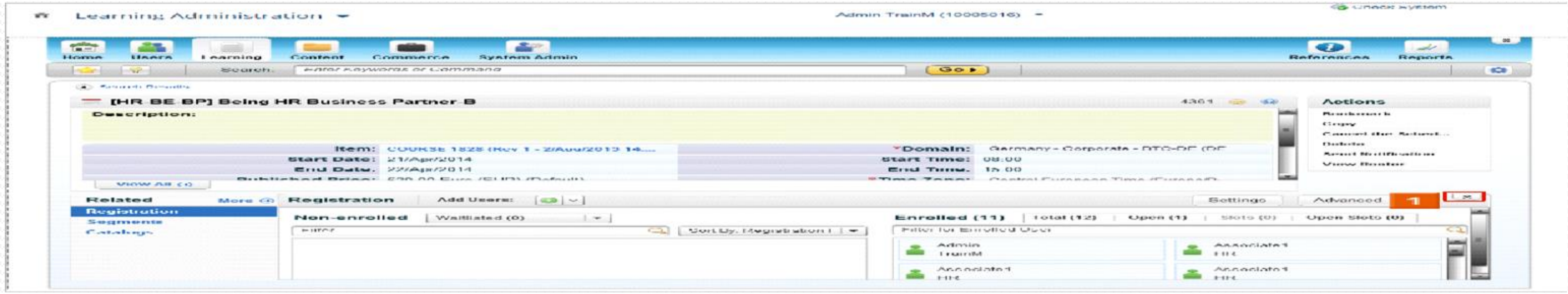
Usually users **self-enroll** to scheduled offerings. Only in exceptional cases the Training Administrator / Course Administrator enrolls users to a scheduled offering (users without a request on the course).

This action is only done by Training Administrators / Course Administrators if the deadline of enrollment does not allow users to self-enroll to scheduled offering.

If Training Administrators / Course Administrators enroll users (without request on the course) you have to keep in mind, that the Approval Process will be excluded.

1 Scheduled Offering Record – Related – Registration

The documentation and the system simulation at hand provide only the approach to identify scheduled offerings, catalogs and items associated with through an example. For the practical realization in the productive system you have to use the according data, values or factors.



1 Click the **Click to expand the Related region** ( ) button.

Adding Slots

- **How do I add Slots for NN Users of an Organisation ID?**

How do I add Slots for NN Users of an Organisation ID?

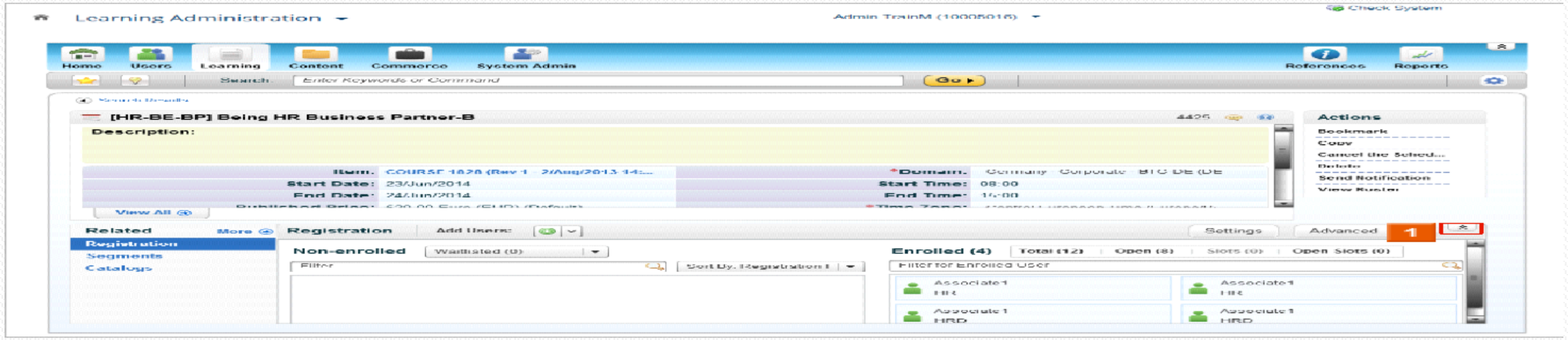
Introduction:

Slots are seats in the scheduled offering that you can reserve for an organization. If you select a **Slot ID**, then the system automatically registers users (who belong to that organization) into any available slots that the organization reserved.

Slots can **only be used** by users of who belong to **exactly** the indicated Organization ID of the slot.

1 Scheduled Offering Record – SuccessFactors Administration – Related – Registration

The documentation and the system simulation at hand provide only the approach to identify catalogs and items associated with through an example. For the practical realization in the productive system you have to use the according data, values or factors.



1 Click the **Click to expand the Related region (** ⌃ **)** button.

Resource Management

- Physical Resources.
- Location.
- Equipment.
- How to configure
- How to add them at SO level.

System Administration – Custom Columns

- Define Custom Columns
- System Admin - > Custom Columns -> Users
- System Admin -> Custom Columns -> Scheduled Offerings.
- System Admin -> Custom Columns -> User
- System Admin -> Custom Columns -> Instructor
- System Admin -> Custom Columns -> Organization

Course Completion Status

Record Learning Financial

- Users – > Tools -> Record Learning Financial.
- Select SO
- Enter Profit and Cost Centre

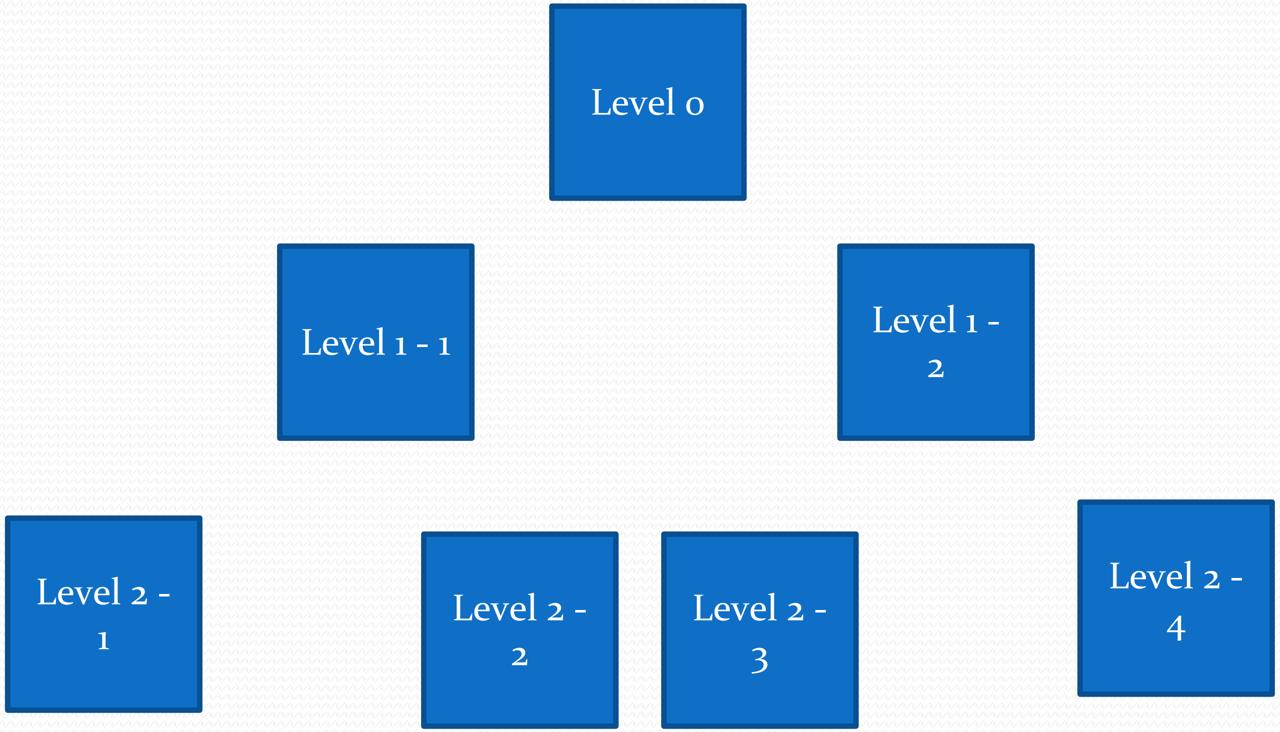
Security Management

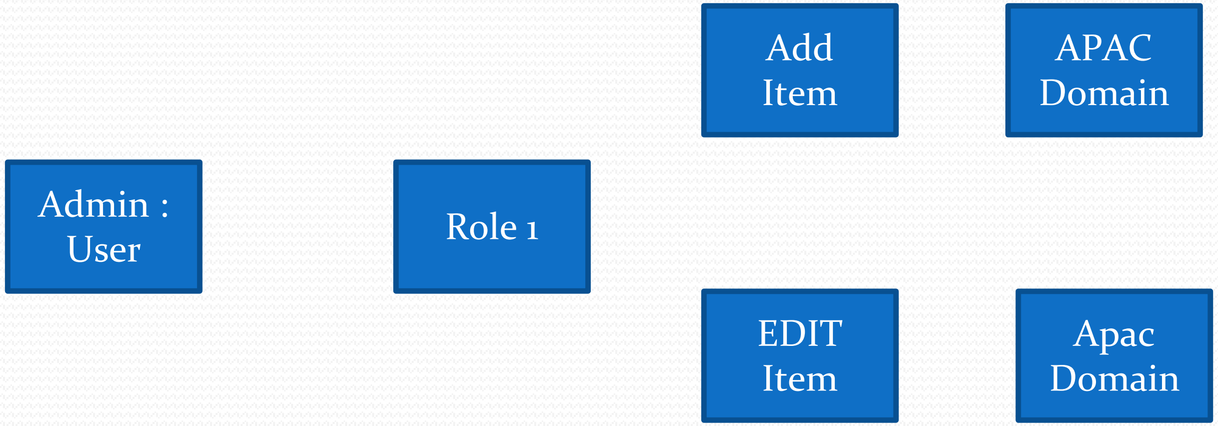
- Roles
- Work flows Groups
- Work Flow ID – (Function + Entity)
- Function (Create) and Entity (Item).
- Domains
- Domain Restrictions.

Roles

- TrainM Administrator
- Course Administrator
- Product Manager
- HRBP Role
- Super Administrator
- Support Administrator
- Resource Administrator

Domains

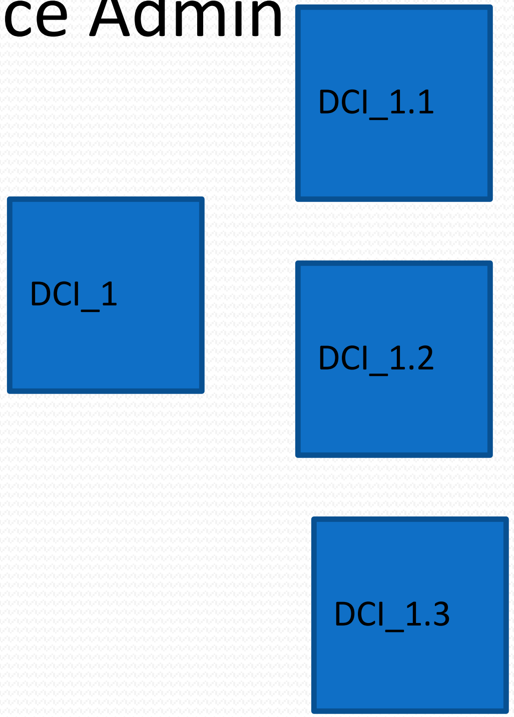



Add Item
APAC Domain
Admin : User
Role 1
EDIT Item
Apac Domain

Workflows

Domain Restrictions

Finance Admin



Admin Role Assignment

Domain and Catalogs

- Difference between Domaons and Catalogs

Online Content Management -

- Deployment of Icontent server

How to upload content in to I content server
How to do you associate online content to Training Item
Launch the Training

- Third Party Integration

- VLS – Virtual Learning Services (Business Skype , Cisco Webex , Macromedia flash)

- OCN – Open Content Network service provide (5- 6 vendors) Udacity, Courseware , etc

Icontent Server - Credentials

- iContent Credentials:
- Link: https://sftp10.successfactors.com
- User NAme : client
- Password: ***********
- Port : 22 (95 %) OR 25
- URL : Varies from DC to DC

Upload Online Content

Content Settings

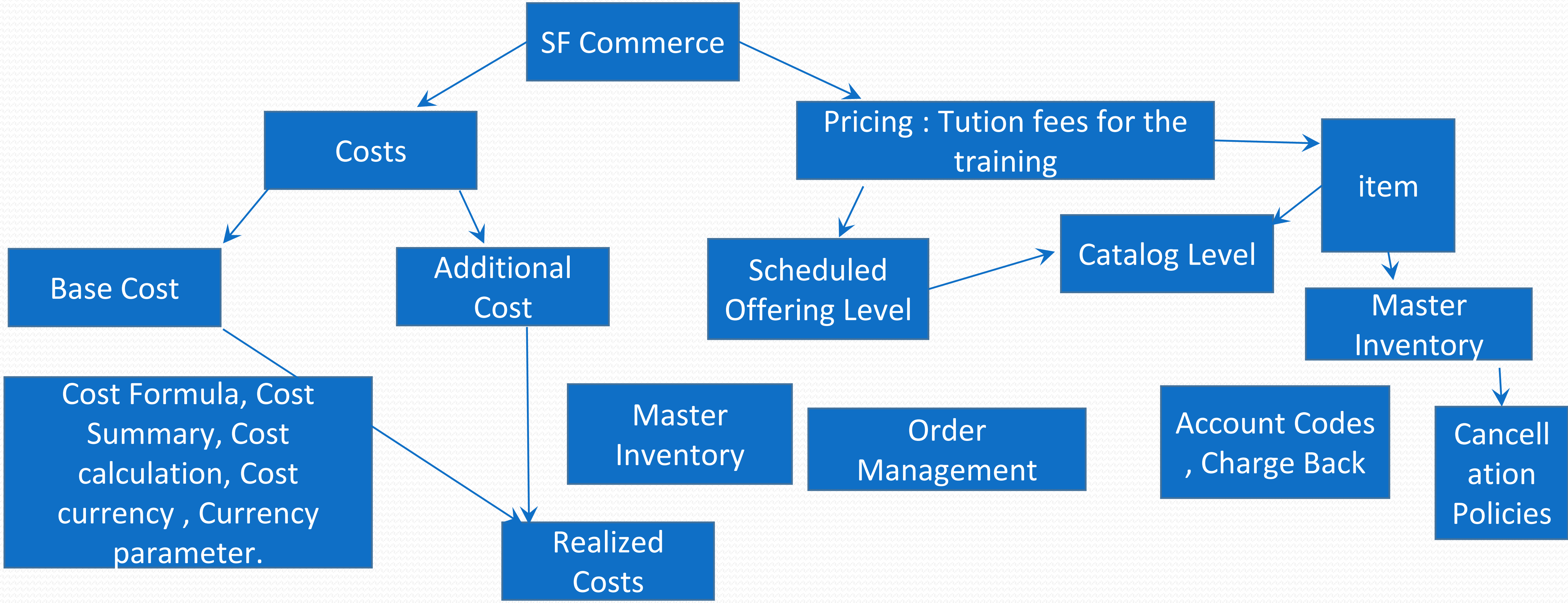
- SYSTEM Admin -> Configuration - > System Configuration

Tasks – SF LMS

- Tasks – Neither online nor classroom
- Learning -> Tasks (Create list of Tasks)
- Create item with classification others
- Add tasks
- Maintain Task checklist settings
- Users can add observers
- Record learning or failure by observer

Reporting

Success Factors LMS Commerce Workflow


SF Commerce
Costs
Pricing : Tution fees for the training
item
Base Cost
Additional Cost
Scheduled Offering Level
Catalog Level
Master Inventory
Cost Formula, Cost Summary, Cost calculation, Cost currency , Currency parameter.
Master Inventory
Order Management
Account Codes , Charge Back
Cancell ation Policies
Realized Costs

Course Objectives

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

- Set base and additional costs for resources
- Track delivery costs for a scheduled offering
- Close a scheduled offering and capture realized costs
- Describe how profit and cost centers work in SuccessFactors Learning
- Establish pricing for an item in multiple currencies
- Use the Catalog Price Change Assistant to modify pricing of an item
- Create and apply a cancellation policy to an item
- Control chargebacks to internal accounts, including distributions across multiple accounts

Success Factors Commerce

- SF Commerce is all about cost incurred to launch a training and pricing charged as tuition against per registration.

  - **Costs:** This section details the process of tracking the administrative costs of delivering training. Additionally, costs can be defined to track user costs of attending training (such as travel and meal expenses).

- **Pricing:** This section details the process of tracking the amount a user is charged to take training, including assigning prices to items and scheduled offerings, and setting a chargeback method.

- **Managing Transactions:** This section details the process of managing transactions, including setting a cancellation policy, calculating realized costs for a scheduled offering, editing completed orders (transactions), and posting transactions for export to a financial system.

Key Terms in SF Commerce

- Resource Cost : Amount charged against use of resources for each scheduled offering (Resources: Instructors, Locations, Equipment's)
- Account Code: A code use to record chargeback information of financial transactions and they are associated with users, Org Units, Items , SO.
- Price : Tuition Fees per employee per registration.
- Cost center : Account Code which is charged or from which the amount is debited. Debit Account code.
- Profit center : Account code which is credited.
- Cost Name: Specific Costs with reference to Item or SO or Resource.

Eg : Lodging Cost, Boarding etc.

Resource Costs

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

- Describe base costs and additional costs
- Describe how cost names work with resource costs
- Apply costs to resources
- Describe how currency settings work with resources and scheduled offerings
- Identify the characteristics of the scheduled offering Cost Calculation and Cost Summary tabs

Types of Resource Costs

Costs can be established for resources and those costs carry into a scheduled offering when a resource is used during a segment of the offering. There are two types of costs that can be set for a resource, base cost, and additional costs. Once a scheduled offering is complete, an admin is able to enter the realized cost and close the scheduled offering, committing the financial transactions to the database.

Base Costs for Resources

Resources such as instructors, equipment, and locations can be assigned a base cost. The base cost is applied to scheduled offerings every time the resource is assigned to a segment. The administrator can set the base cost at the resource level to be a “fixed” cost or allow it to be overridden when applied to a scheduled offering. Administrators set an amount, currency, and unit of measure for the base cost (Figure 1).

Additional Costs

- Additional Costs refer to the other specific cost incurred on each resources in particular.

Eg : Travel cost, Lodging , Meal Expenses for a Instructor

- Prior to use of Additional cost we first create the entity called cost name with correct resource type selected so that this cost name will be available to the admins at resource level while adding additional cost.
- Additional costs can be overridden at SO level.

Adding Base Cost to Resources

Lab 1. Adding Base Costs to Resources

Add Base Cost to an Instructor

Step	
1.	Navigate to **Learning** > **Instructors**.
2.	Enter criteria to search for an instructor and click **Search**.
3.	Click the **edit icon** to access the instructor record in edit mode.
4.	Select the **Base Cost** tab (located on the left).
5.	Enter a value in the Amount textbox.
6.	Select a currency from the drop-down menu.
7.	Select a unit of measure from the drop-down menu.
8.	Click **Add**.
9.	Check the **Allow override of default base cost at time of scheduling** checkbox.
10.	Click **Apply Changes**.

Add base cost to location

Add Base Cost to a Location

Step	
1.	Navigate to **References** > **Physical Resources** > **Locations.**
2.	Enter criteria to search for a location and click **Search.**
3.	Click the **edit icon** to access the location record in edit mode.
4.	Select the **Base Cost** tab.

Add base cost to location….Cont

Steps to create Cost Name

Lab 2. Adding a Cost Name

Step	
1.	Navigate to **References** > **Commerce** > **Cost Names.**
2.	Click **Add New.**
3.	Enter a cost name in the **Cost Name** textbox.
4.	Enter a description in the **Description** textbox.
5.	Click to check the **Instructor** checkbox.
6.	Click **Add.**
7.	Click the **X** to close the window.
8.	Repeat steps 2 - 4
9.	Click to check the **Location** checkbox.
10.	Click **Add.**

Steps to Additional costs to Resources

Lab 3. Adding Additional Costs to Resources

Add Additional Cost to an Instructor

Step	
1.	Navigate to **Learning** > **Instructors**.
2.	Enter search criteria to search for an instructor and click **Search**.
3.	Click the **edit icon** to access the instructor record in edit mode.
4.	Select the **Additional Costs** tab.
5.	Search for and select the cost name created in Lab 2.
6.	Enter a value in the Amount textbox.
7.	Select a currency from the Currency drop-down menu.
8.	Select a unit of measure from the Unit of Measure drop-down menu.
9.	Click **Add**.

Add Additional Cost to Location

Add Additional Cost to Location…Cont

7. Select a currency from the Currency drop-down menu.

8. Select a unit of measure from the Unit of Measure drop-down menu.

9. Click **Add**.

10. Close the References window.

Important Note

- Now we can assign the resources to SO at segment level.
- The Costs associated with resources directly will get reflected in the Cost summary Tab of SO.

Note : **THE COSTS ARE DISPLYED ONLY IF THE COST CURRENCY PARAMETER OF COST CALCULATION TAB IS SAME AS CURRENCY SELECTED WHILE ADDING THE COSTS TO RESOURCES. IF NOT 0 IS DISPLAYED ON COST SUMMARY TAB.**

View Resource Costs at SO Level

View Resource Costs at SO Level…CONT

9. Select **Add Location** from the drop-down menu.
10. Check the **Add** checkbox next to the location you set costs for in Lab 1.
11. Click **Add**.
12. If not selected, click the radio button to make the instructor and location you selected the Primary resources for the segment.
13. Click **Save And Close**.
14. Click **More** from the Related area.
15. Select the **Cost Summary** tab.
16. Do the costs for the resources display?
    If so, the lab is complete.
    If not, continue with Step 17.

View Resource Costs at SO Level…CONT

17. Select the **Cost Calculation** tab.

18. Select a cost currency that matches the currency you used in your resource setup.

19. Click **Apply Changes.**

20. Select the **Cost Summary** tab and view the resource costs.

Account Codes

- Account Code is simply a ID used in Financial information systems for financial transactions.
- Account codes are associated with users and Organizations.
- Types of Account Codes: Cost Center and Profit Center
- Cost Center : Charged from or Debited from Account Code
- Profit Center : Account code which is credited.

Jane Williams
Account Code: 009012

Steven Smith Williams
Account Code: 002134

Jane and Steven enroll into a scheduled offering of MS Word (price $500) being sponsored by the IT Organization (account code: 002134).

Cost Center	Amount	Profit Center	Amount
009012	($500)	002134	$500
002134	($500)	002134	$500

Adding Account Codes

Lab 5. Adding Account Codes

Step	
1.	Navigate to **Commerce** > **Account Codes.**
2.	Click **Add New.**
3.	Enter an account code ID in the Account Code textbox.
4.	Enter a description for the account in the Description textbox.
5.	Select a domain.
6.	Click **Add.**
7.	Repeat steps 2-6 to create an additional account code.

Adding Account Codes to Organizational Units

Adding Account Codes to User

Lab 7. Assigning Account Codes to a User

Step	
1.	Navigate to **Users** > **Users.**
2.	Enter search criteria to search for a user record.
3.	Click **Search**.
4.	Click the **user ID** link to access a user record.
5.	Click the **More** from the Related area.
6.	Select the **Account Code** tab.
7.	Enter an account code created in Lab 5.
8.	Check the **User Can Use Org Accounts:** checkbox.
9.	Click **Apply Changes.**

Closing and Cancellation of SO

- Realized Costs
- At time of closing or cancelling the scheduled offering there might be some resources costs which would have actually not incurred entire amount so changes are still possible which is done at realization stage.
- Once resource costs are realized the SO is closed and there is no way back for modifications in LMS for that SO.

Closing a Scheduled Offering

Lab 8. Closing a Scheduled Offering with Realized Costs

Step

1. Add a new scheduled offering with a start date/time in the past.

   Note: *The system displays a warning message that your date is in the past.*

2. Select the **Segments** tab from the Related area.

3. Double click the segment in which to assign an instructor and assign the instructor and location you set costs for in Lab 1.

4. Click **Save and Close.**

5. Click **More** from the Related area.

6. Select the **Cost Summary** tab.

Closing a Scheduled Offering … Cont

Closing a Scheduled Offering … Cont

12. Click the **expand icon** ( ) next to the specific resource to view/edit the cost details for that resource.

13. Update the cost for the resource.

14. Click **Apply Changes**.

Note: Base costs may not be editable depending on the resource setup. You may also receive a warning message that you are overriding the defaults. If this message displays, click Yes to proceed.

15. Select the X to close the window return to the scheduled offering record.

16. Click the **Close the Scheduled Offering** link from the Actions area.

17. Review the scheduled offering ID and closing date. Modify if necessary.

18. Click **Next**.

19. Click the **expand icon** to expand the Scheduled Offering Total.

Closing a Scheduled Offering … Cont

20. Click the checkbox next to each resource for which a cost was realized for the scheduled offering.

Note: To capture individual resources of a specific type, click the expand arrow next to each specific type.

21. Click **Update Total**.

22. Click **Next**.

23. Enter the cost center and click **Add**.

24. Click **Next**.

25. Enter a profit center and click **Add**.

26. Click **Next**.

27. Review the information, and click **Finish**.

Closing a Scheduled Offering … Cont

Cancellation of a Scheduled Offering

Lab 9. Cancelling a Scheduled Offering

Step	
1.	Add a new scheduled offering with the instructor created in Lab 1.
2.	Click **More** from the Related area.
3.	Select the **Cost Summary** tab.
4.	Click the **expand icon** (⊞) next to Instructor.
5.	Click the **expand icon** (⊞) next to the specific resource.
6.	Change the additional cost amount to **$500**.
7.	Click **Apply Changes**.
8.	Click **X** to close the window.
9.	Click **Cancel the Scheduled Offering** from the Actions area.

Cancellation of a Scheduled Offering…Cont

8. Click X to close the window.
9. Click **Cancel the Scheduled Offering** from the Actions area.
10. Review the scheduled offering ID and cancellation date. Modify if necessary.
11. Click **Next**.
12. Click the **expand icon** to expand the Scheduled Offering Total.
13. Click the **Expand All** link.
14. Click the checkbox next to each resource to include in the realized costs for the scheduled offering.
15. Click **Update Total**.
16. Click **Next**.
17. Enter the cost center and click **Add**.

Cancellation of a Scheduled Offering…Cont

18. Click **Next**.
19. Enter a profit center and click **Add**.
20. Review the percentage for distribution.
21. Click **Next**.
22. Click to check the appropriate checkboxes on the Post Cancellation Action Settings screen.
23. Click **Next**.
24. Review the information on the Confirm screen.
25. Click **Finish**.
26. Click **OK**.

LMS Commerce : Pricing

- Pricing is the tuition fees , applied at Item, curriculum, Organization level.

Pricing at Item Level

Lab 10. Applying Pricing to an Item

Step	
1.	Add a new instructor-led item and it to one or more catalogs.
2.	Click **More** from the Related area.
3.	Select the **Pricing** tab.
4.	Enter a default published price in the Price textbox.
5.	Click to check the **Scheduled Offering Can Override Item Prices** checkbox.
6.	Click **Apply Changes.**
	This starts the Master Inventory Price Change Assistant.
7.	Click **Yes** on the Master Inventory Price Change Propagation screen.

Pricing at Item Level …Cont

8. Click **Next.**

9. View the default price/currency.

10. Check the **Apply price change to catalogs:** checkbox.

11. If desired, enter a price in additional currencies and check the **Add** checkbox next to each.

12. Click **Next.**

13. Select all displayed catalogs.

14. Click **Next.**

15. Select all displayed orders.

16. Click **Next.**

Pricing at Item Level …Cont

Change Catalog Prices

Lab 11. Changing the Default Published Price of an Item

Step

1. Access the item created in Lab 10.
2. Select the **Catalogs** tab from the Related area.
3. Click **Change Catalog Prices**.
4. Change the default price in the appropriate **Price** boxes and check the **Add** checkbox next to each.
5. Click **Next**.
6. Select all orders.
7. Click **Next**.
8. Review the catalog price change summary details.
9. Click **Finish**.

Note: *Existing scheduled offerings are not affected by the price change. To change the price for a scheduled offering, go to the Pricing tab within the scheduled offering record.*

Pricing at SO Level

- Pricing can also be done at SO Level.
- Catalog prices can also be changed at SO Level.

Cancellation Policies

A cancellation policy can be applied to an item in the master inventory. You can create as many policies as you need, but only one policy can be applied to a single item. These policies contain a set of rules that dictate how users should be charged (if at all) when they withdraw from a scheduled offering. The combination of delivery offset days and rule types each make up one rule (Figure 17). These rules consist of:

- Delivery offset days (days before or after the first day of the scheduled offering)
- Rule types
- No charge
- Charge full price
- Charge percentage
- Charge fixed amount

Cancellation Policies…Cont

There must be one active (future) scheduled offering in the master inventory in order to apply a cancellation policy to an item.

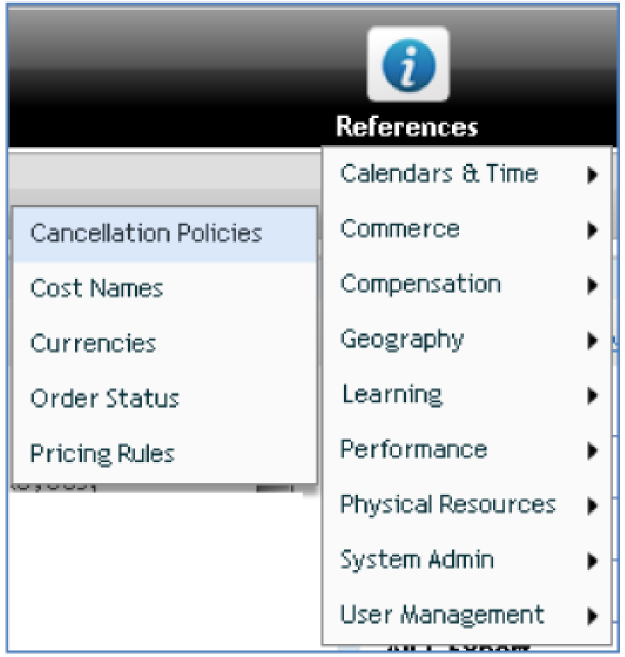


Figure 17. Cancellation Policy Record

Add new Cancellation Policies

Lab 12. Creating a Cancellation Policy

Step

1. Navigate to **References** > **Commerce** > **Cancellation Policies.**
2. Click **Add New.**
3. Enter an ID for the cancellation policy.
4. Enter a description for the policy.
5. Click **Add.**
6. Select the **Rules** tab.
7. Enter **-21** in the **Delivery Offset (Days)** textbox.

Note: *A negative (-) number should be used for days leading up to the scheduled offering; a positive number (+) is for days after the scheduled offering.*

Add new Cancellation Policies

Applying a cancellation Policy

Lab 13. Applying a Cancellation Policy

Step

1. Create a scheduled offering for the item you created in Lab 10. Have the start date be within a week of the current date and allow users to self-register.

2. Navigate to **Commerce** > **Master Inventory.**

3. Search for the item that you scheduled in Step 1.

Note: Click Add/Remove Criteria to add the Items search criteria. Search for and submit the item search criteria.

4. Click **Search.**

Applying a cancellation Policy…Cont

5. Click the **edit icon** to access the record in edit mode.

6. Select the cancellation policy you added in Lab 12.

7. Click **Apply Changes.**

Note: There must be a future (active) scheduled offering of the item in order to apply the cancellation policy.

8. As a user, register into the scheduled offering and then withdraw. The system displays a message about the cancellation and refund.

Pricing Rules

Pricing rules are simply a single percentage discount that can be applied against an entire catalog. In order for this change to take effect, the automatic process for catalog pricing must run. Each catalog may have one pricing rule assigned to it.

Pricing Rules…Cont

Figure 18 depicts the pricing hierarchy process.

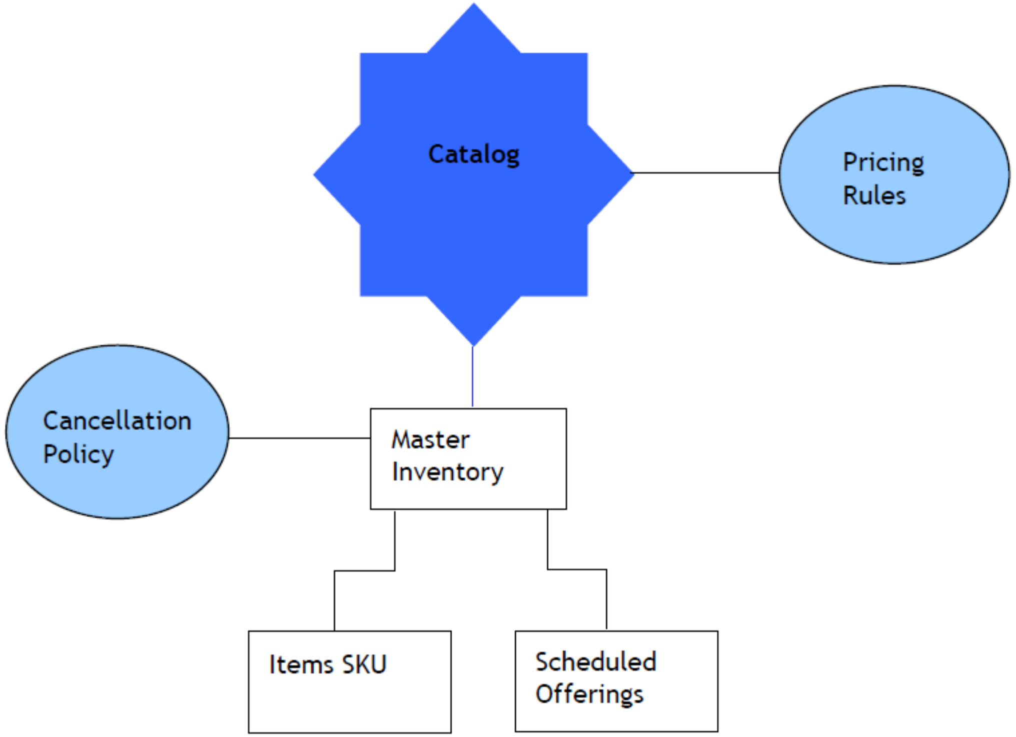


Figure 18. Pricing Hierarchy Process

Adding a New Pricing Rule

Lab 14. Adding a Pricing Rule

Step	
1.	Navigate to **References > Commerce > Pricing Rules.**
2.	Click **Add New.**
3.	Enter an ID for the pricing rule.
4.	Enter a description of the pricing rule.
5.	Enter a value for the discount (%).
6.	Click **Add.**

Applying a Pricing Rule to a Catalog

Lab 15. Applying a Pricing Rule to a Catalog

Step	
1.	Navigate to **Learning** > **Catalogs**.
2.	Enter criteria to search for a catalog.
3.	Click **Search**.
4.	Click the **Catalog ID** to access the catalog record.
5.	Click the pricing rule field and select the rule added in Lab 14 from the Pricing Rule drop-down menu.
6.	Click **Save**.

Note: The pricing rule is applied to all items contained in the catalog that have a price.

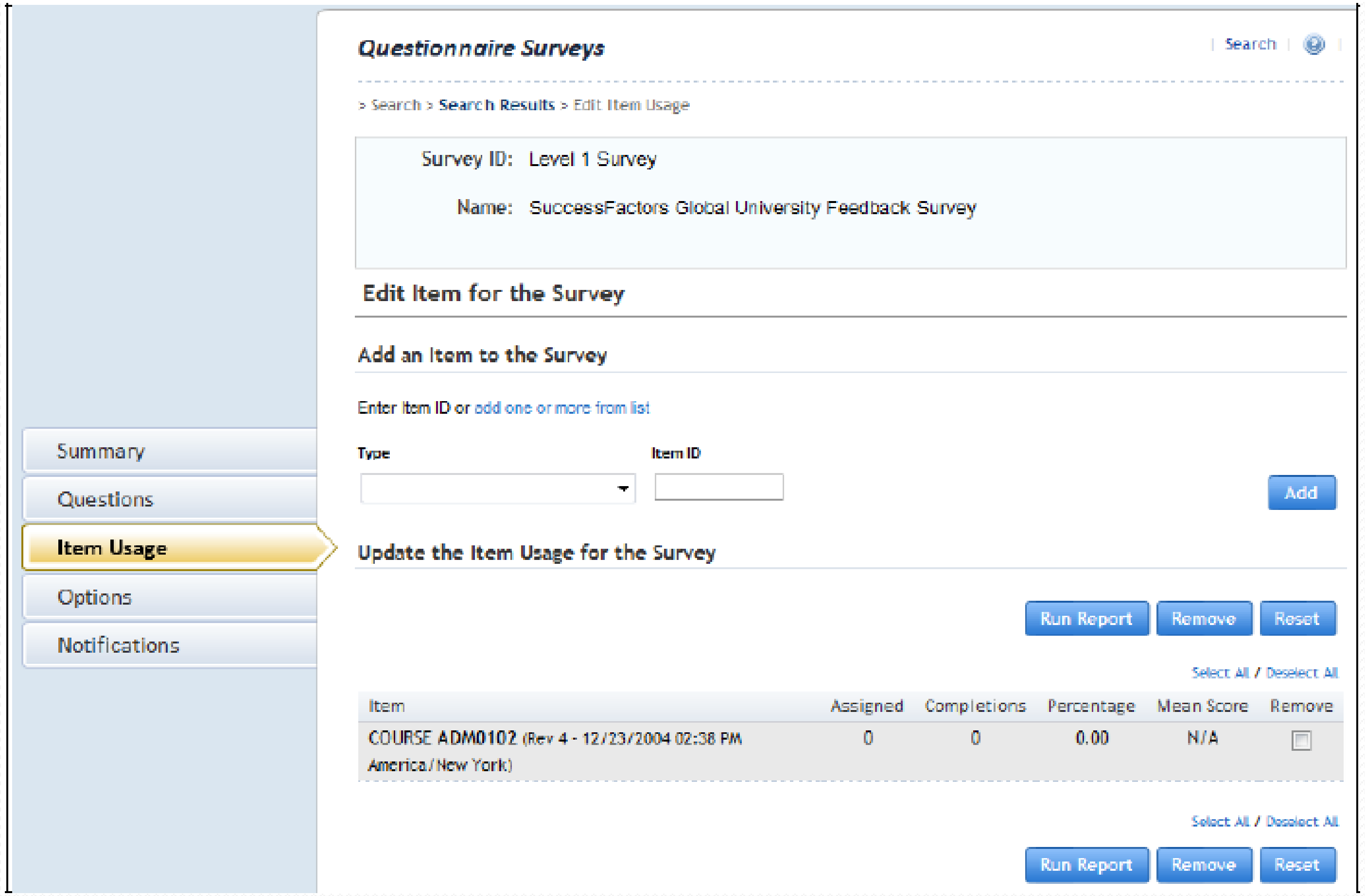
Order Management

- Pending ????????????????

Evaluation Surveys

- Item Evaluation
- Learning Evaluation – Pre and Post exams
- Follow up evaluation. (Efficient Implementation of learning)

Sample Screenshot – Item Evaluation Survey



Configurations in a Questionnaire Survey

- Summary
- Questions
- Options
- Item Usage
- Notifications

Creating a New Survey

Lab 1. Create Draft Survey and Add Questions: Item Evaluation

Step

1. Navigate to **Learning** > **Questionnaire Surveys**.
2. Click **Add New**.
3. Enter a survey ID.
4. Enter a survey name.
5. Select an evaluation level (for this example, select **Item Evaluation: User Satisfaction**).
6. Enter survey description.
7. Enter comments.
8. Select domain.
9. Check **Active** checkbox.

Creating a New Survey … Cont

10. Click **Add.**
11. Select the **Questions** tab.
12. Enter survey instructions.
13. Enter first page title.
14. Enter first page instructions.
15. Click **Add Question** icon ( ).
16. Enter question stem.
17. Select question type (rating scale).
18. Select a rating scale.

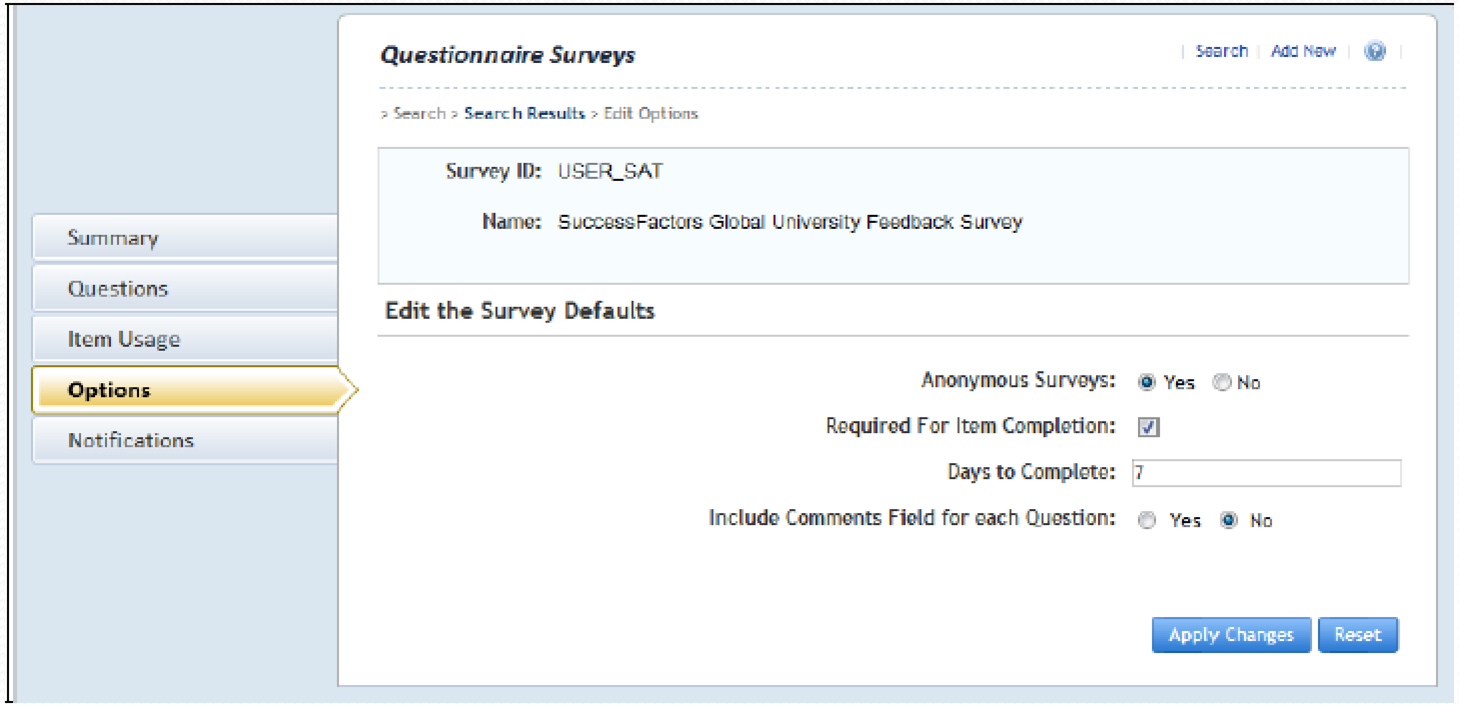
Creating a New Survey … Cont

19. Repeat steps 15-18 to add additional questions.
20. Click **Add Page** icon ( ).
21. Enter second page title.
22. Enter second page instructions.
23. Click **Add Question** icon ( ).
24. Enter question stem.
25. Select question type (rating scale).
26. Select a rating scale.
27. Repeat steps 23-26 to add additional questions.
28. Click **Save Draft**.

Configuration Options

- Required for item completion can be checked if mandatory.
- Anonymous reply from users.
- Days to complete can be configured.
- A comment section can be added after each question for additional feedback per question.

Configuration Options



Notifications

NOTIFICATIONS

There are two notification templates associated with the questionnaire survey functionality:

- Questionnaire Survey Assignment Notification Email Template
- Questionnaire Survey Assignment Notification RollUp Email Template

A user is sent a notification upon the assignment of a survey. (It is recommended to embed a questionnaire survey direct link into the notification template to generate an actual link within the email.) An item evaluation survey is assigned to a user upon completion of an item (a learning event is recorded) (Figure 6). A follow-up survey is assigned to a user and/or the user's supervisor in a configurable number of days after item completion and is triggered by an automatic process manager (APM).

Notifications

Lab 2. Configure Options and Notifications for Draft Survey: Item Evaluation

Step	
1.	Access survey record from the previous lab.
2.	Select the **Options** tab.
3.	Select **Yes** for anonymous surveys.
4.	Check the **Required for Item Completion** checkbox.
5.	Enter number of days to complete survey from assignment.
6.	Select option to include comments field for each question.

Notifications…Cont

7. Click **Apply Changes.**
8. Select the **Notifications** tab.
9. If necessary, edit body of notification message.
10. Click **Apply Changes.**
11. If necessary, click **Browse** to add an attachment to notification.
12. Click **Apply Changes.**

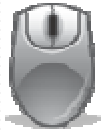
Preview AND Publish

PREVIEW AND PUBLISH

Once a survey has been created, it is important to preview the draft survey before publishing and making it available for use. From the Questions tab, click the **Preview** button and select **Draft** for an option to preview the draft version of the survey (Figure 7).

Preview AND Publish

How to Add Items to Survey: Method 1



Lab 4. Associate Survey with Item: Item Evaluation

Step	
1.	Select the **Item Usage** tab.
2.	Click the **add one or more from list** link.
3.	Search for one or more items.
4.	Select one or more items from results list.
5.	Click **Add**.

How to Add Items to Survey: Method 2

Lab 5. Associate Item with Survey: Item Evaluation

Step

1. Navigate to **Learning** > **Items**.
2. Search for an item.
3. Click the item key link to access the item in edit mode.
4. Click **More** from the Related area.
5. Select the **Evaluations** tab.
6. In the *Item Evaluation: User Satisfaction* section, click the **search icon** ( ) to search for and select a questionnaire survey.

How to Add Items to Survey: Method 2…Cont

Learning Evaluation –Survey

Lab 6. Associate Pre- and Post-Exams: Learning Evaluation

Step

1. Navigate to **Learning** > **Items.**

2. Search for and access an item record in edit mode.

3. Click **More** from the Related area.

4. Select the **Evaluations** tab.

5. In the *Learning Evaluation: Mastery of Content* section, click the drop-down menu for pre-exam and select the desired exam.

6. Click the drop-down menu for post-exam and select the desired exam.

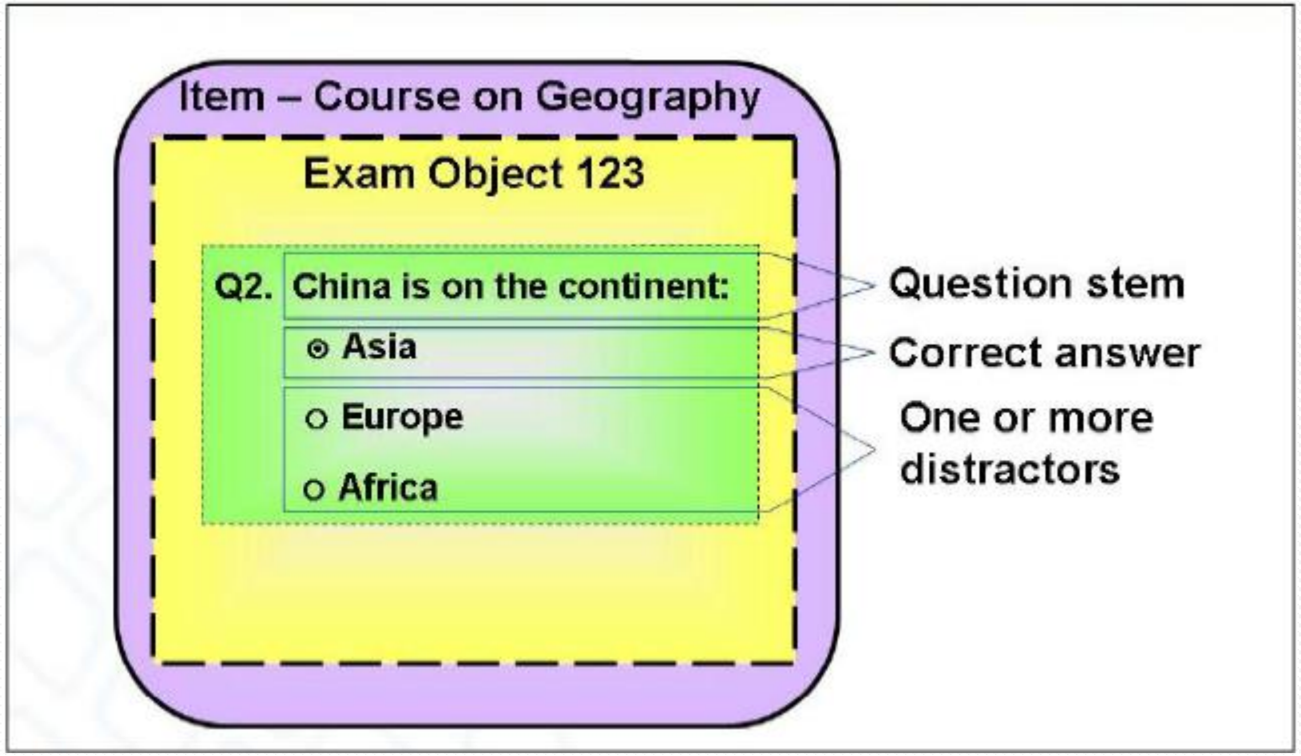
7. Click **Apply Changes**.

Steps to create Exams using : QE

In general, the steps involved in creating exams in Question Editor include:

1. Identify and create the objectives (optional, but needed for question pooling on exams).
2. Create questions in QE related to the objectives.
3. Create a new exam.
4. Add questions to the exam.
5. Create a new item.
6. Add exam to the item.
7. Define online settings for the item.
8. Test the item and exam in the SuccessFactors Learning user interface.

PARTS OF A QUESTION



Question Types in QE

- **True/False:** Users select one of two distractors: *True* or *False*.
- **Multiple Choice/Single Answer (MCSA):** Users select one of multiple distractors as the correct answer to the question.
- **Multiple Choice/Multiple Answer (MCMA):** Users select one or more of multiple distractors. Users receive credit only when all correct answers are selected.
- **External:** Questions imported from another application outside SuccessFactors Learning.

Question Screen Layout

- **Header:** Displays the question name
- **Question setting menu:** Lists each variant of the question including the revision number, question type, and settings
- **Editing and formatting menu:** Provides the tools to edit and format the question
- **Question stem:** Displays the question content
- **Correct answer(s):** Select the radio button or checkboxes to identify the correct answer(s) to the question
- **Additional Distractors:** Display the incorrect answers

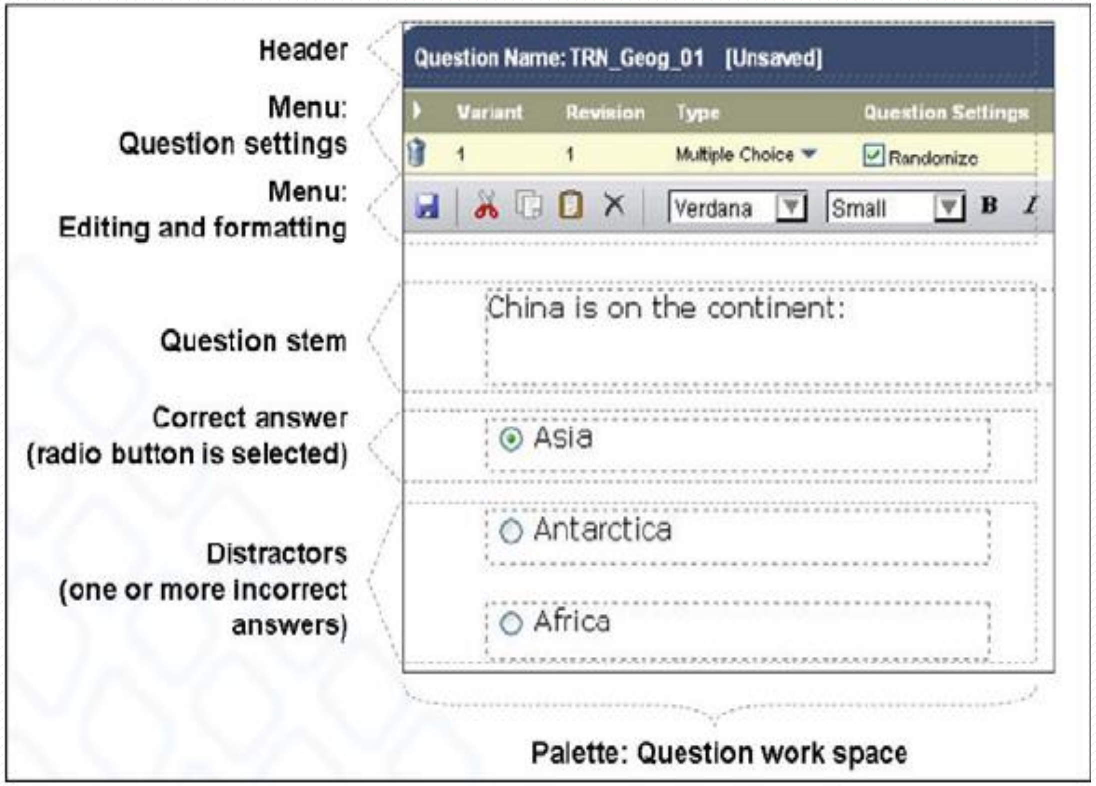


Figure 2. Question Screen Layout

Creating a Question In QE

- Log on Admin Interface of SF Learning
- Click on content -> Questions -> Add new

Creating a Question In QE…CONT

4. Enter the question name and domain.

*Note: Avoid using spaces in the question name. If you do not know the domain, click the **search icon** to search for and select the domain.*

5. Select a question type from the **Question Type** drop-down menu.
6. Click **Add.**
7. Click the magnifying class to search for an objective.
8. Enter search criteria in the Objective Search window.
9. Click **Search.**
10. Select the desired objective.

Note: We will discuss more details for associating objectives to an exam question later.

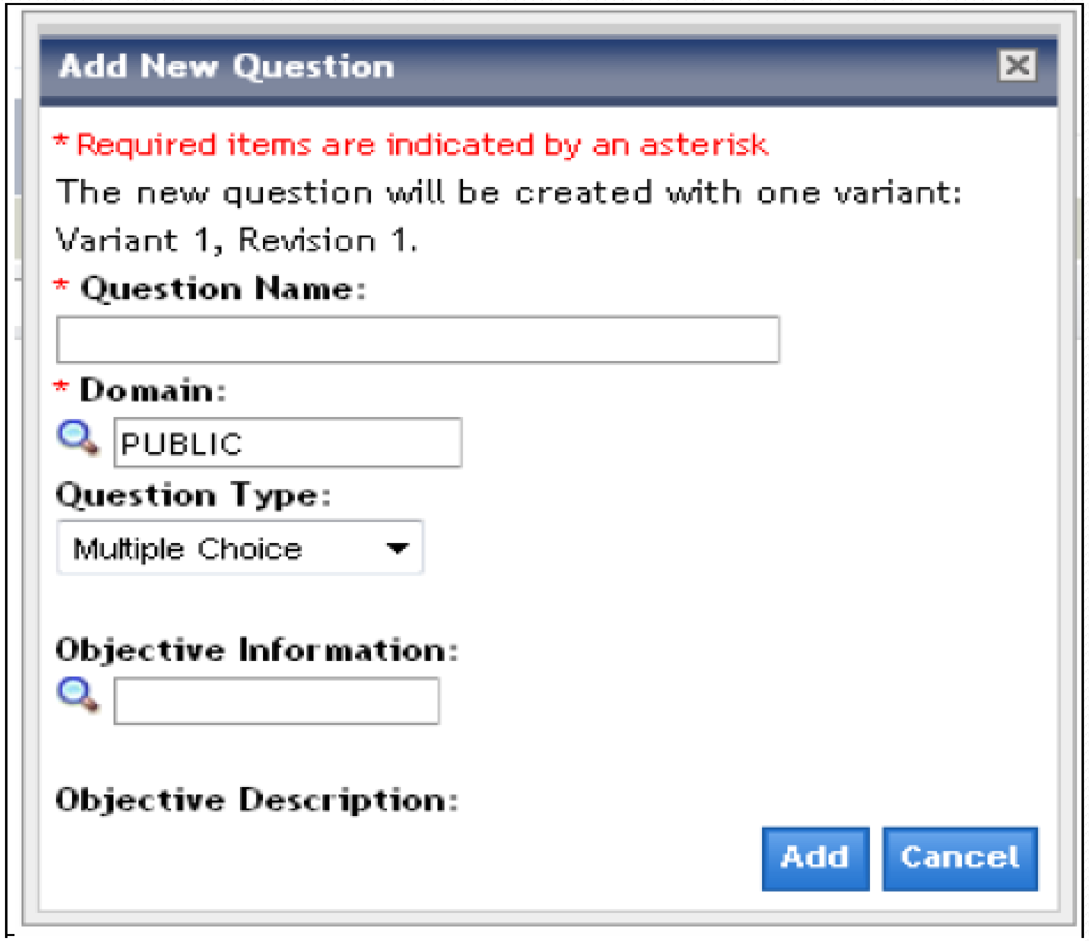


Figure 4. Add New Question Pop-Up Window

Creating a Question In QE…CONT Add New Question Screen

You are taken to the *Questions Add New* screen (Figure 5).

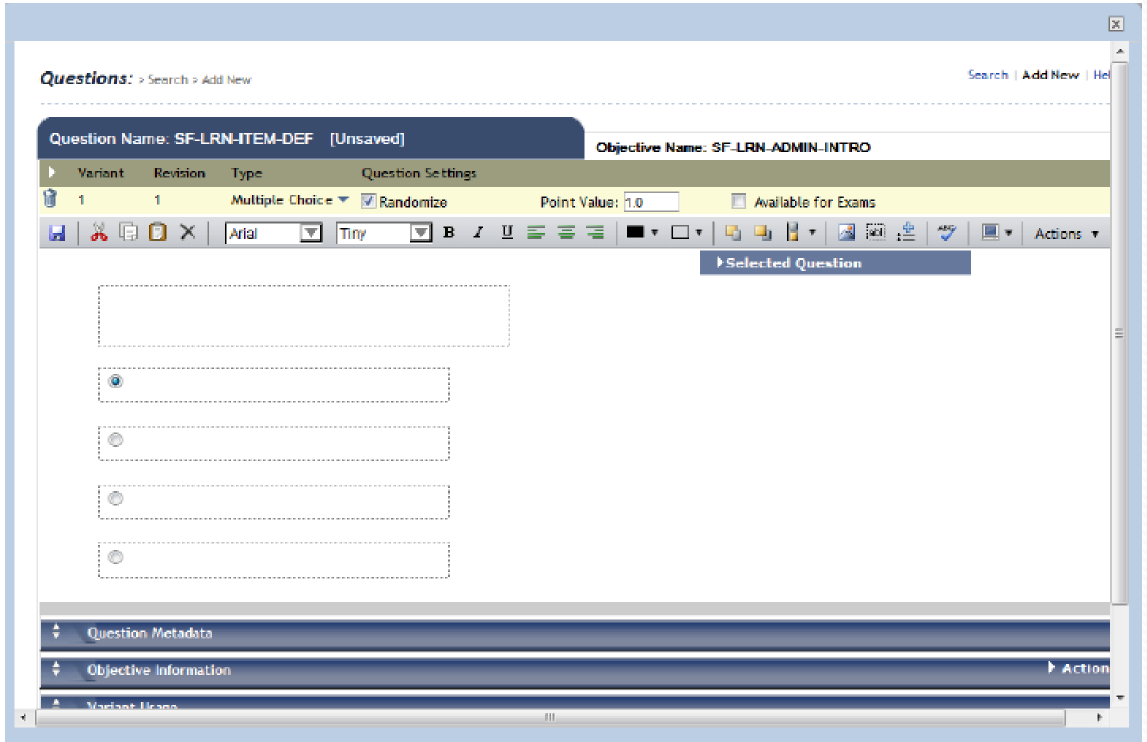


Figure 5. Add New Questions Screen

Creating a Question In QE…CONT

Note

- An items’s classification may change when configuring to support Learning evaluation model.
- For eg : If item of type Instructor led is configured with Learning evaluation model it becomes blended but the same is not the case with online , scheduled and online.

successfactors™ BUSINESS EXECUTION SOFTWARE

Learning Evaluation

Item: SuccessFactors Learning Training(COURSE,SFLEARNING,8/16/2011 10:36 PM EDT *Rev.*1)

Date Range: N/A - N/A

Total Learning Events: 1

Pre-Tests:	SFLEARNING-PRE-EXAM	**Post-Tests:**	SFLEARNING-POST-EXAM	Percentage Increase:	400.00%
Completions:	1	**Completions:**	1		
Mean Score:	20.0	**Mean Score:**	100.0		

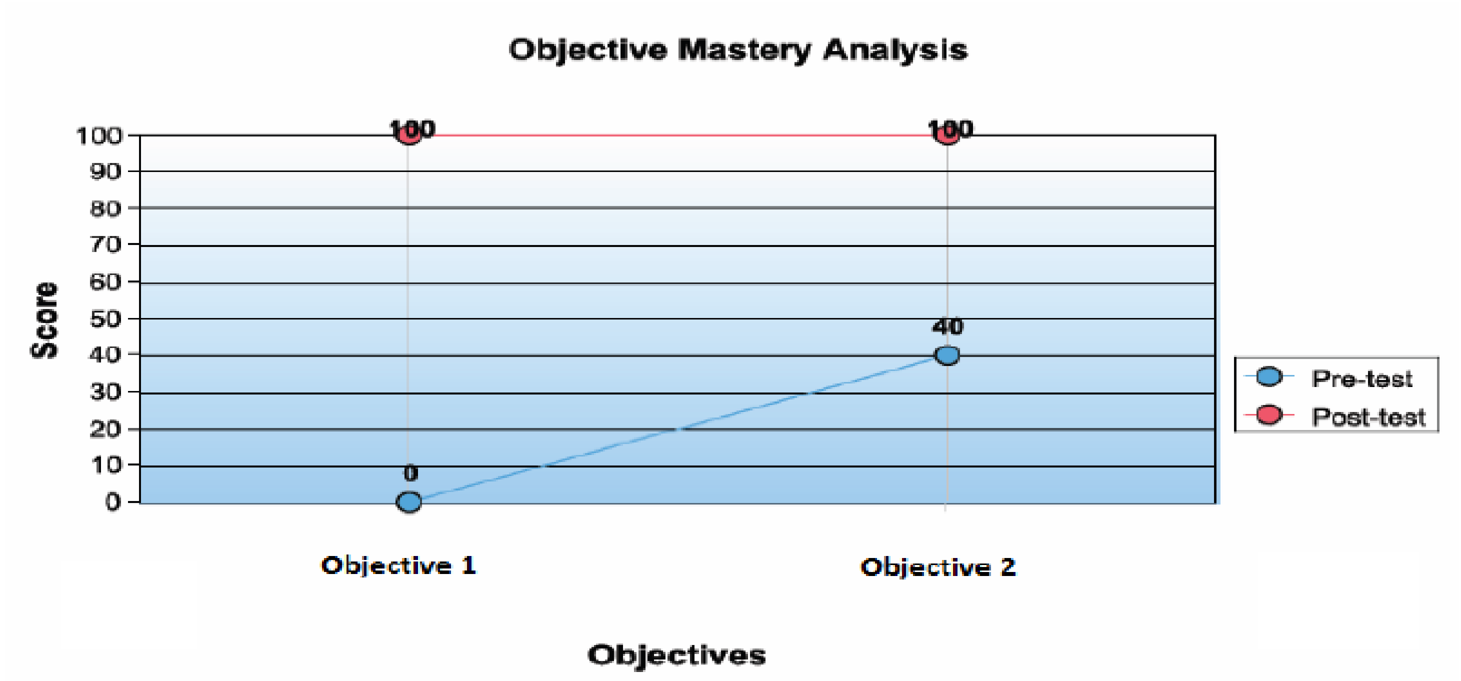
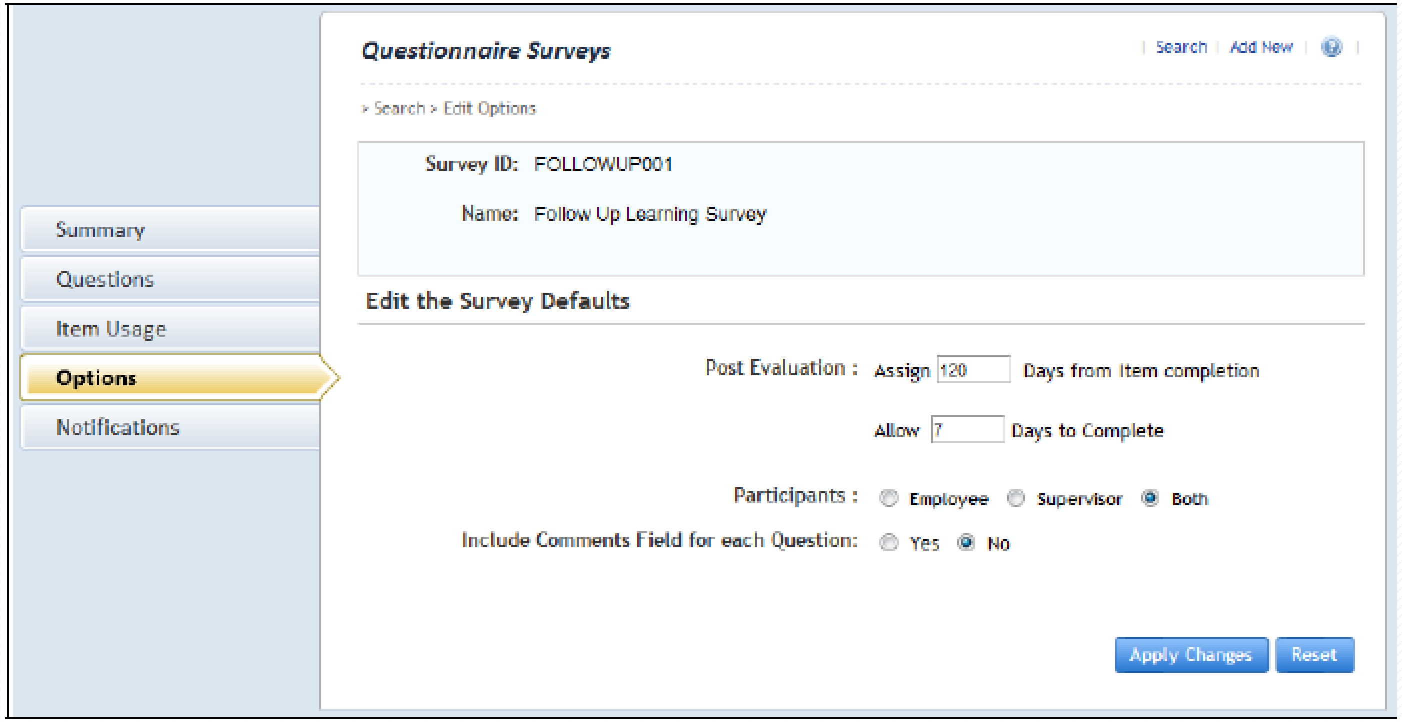


Figure 11. Sample Learning Evaluation Report

Follow up evaluation Survey

- The follow up evaluation can be assigned to an item in a configurable number of days form date of completion of item.
- The evaluation completion date is configurable days from the assigned date.
- Participants can be employee only, employee and supervisor, supervisor only.
- Comments fields can be added after each question.

Sample screenshot



Add New - Follow Up evaluation surveys

Lab 7. Configure Options for Draft Survey: Follow-up Evaluation

Step	
1.	Navigate to **Learning** > **Questionnaire Survey.**
2.	Search for and select the follow-up survey just created in the activity.
3.	Select the **Options** tab.
4.	To configure the post evaluation settings, enter a number of days from item completion to assign the follow-up survey, and a number of days to complete the survey.
5.	Select the follow-up survey participants (employee, supervisor, or both).
6.	Select option to include comments field for each question.
7.	Click **Apply Changes**.

Add New Follow Up evaluation surveys… Cont

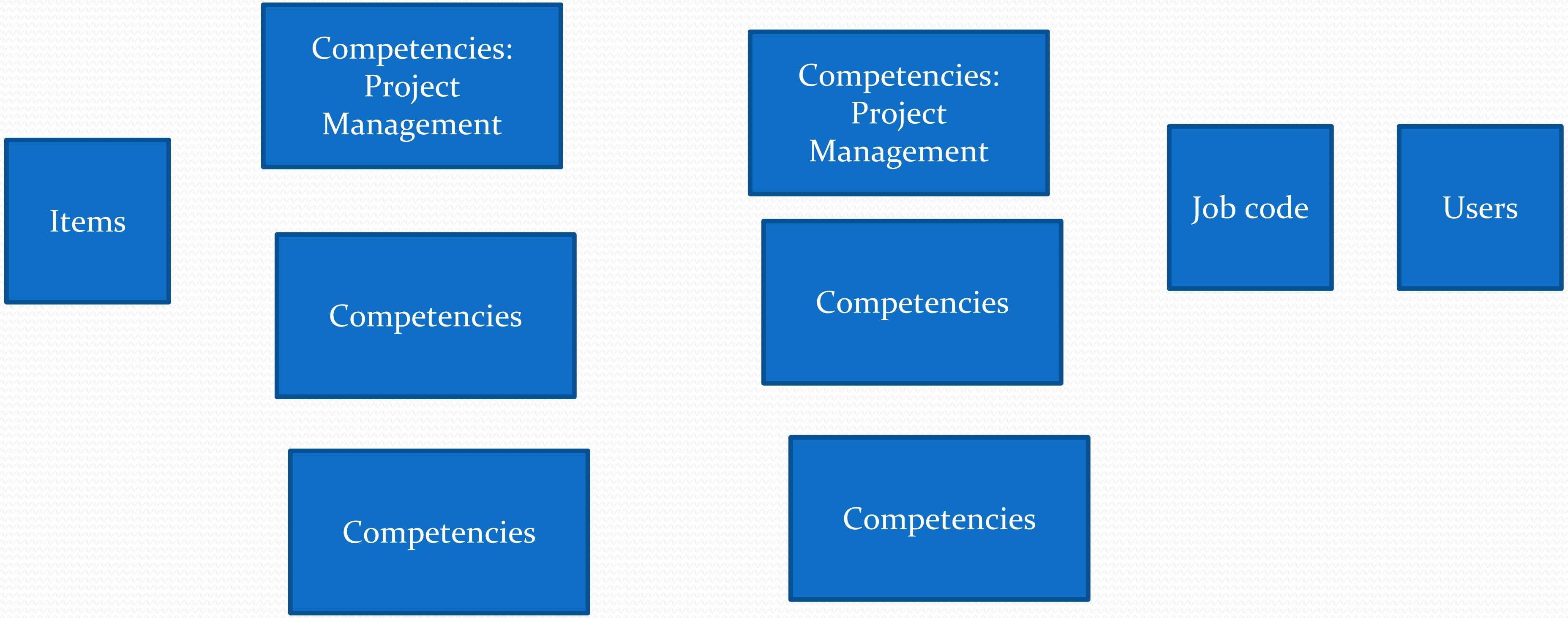
8. Select the **Notifications** tab.
9. If necessary, edit body of notification message.
10. Click **Apply Changes**.
11. If necessary, click **Browse** to add an attachment to notification.
12. Click **Apply Changes**.
13. Select the **Questions** tab.
14. Click **Preview** and then select **Draft** from drop-down menu.
15. Click **Close** to close preview of survey.
16. Click **Publish**. The survey is now ready for use.

Survey Completion – END User

Lab 9. Launch and Complete Assigned Survey

Step	
1.	Log in to SuccessFactors Learning as a user.
2.	Locate the survey on your **To-Do List.**
3.	Click the survey title to launch.
4.	Complete all questions/pages of the survey.
5.	Click **Submit.**

Competency Management



Competency Management

- Competency Assessment editor
- Competency Assessment Recorder
- Competency Gap Assistant

SF LMS – Curricula Management

Curricula

- Curricula may contain items, requirements and sub-Curricula. Depending upon the Curricula settings, different entities within the Curriculum must be complete for the Curriculum to be complete for a User.
- may also be published to catalogs which makes them available for User‘s to self-assign.
- Unlike self-assigned free-floating items, items within a self-assigned Curriculum maintain the assignment type (required, optional, etc) specified in the Curriculum record.
- Also, the use of retraining periods (see Period Based Assignments) and calendar basis requires items to be contained in a Curriculum.

Characteristics of Curricula

General characteristics of curricula include:

- Items can be used in one or multiple curricula with different date and requirement settings in each.
- Modifications made to a curriculum have an immediate impact on all users who have the curriculum currently assigned.
- Curricula can be linked to a job position or assignment profile and automatically assigned when a user is given that job position or meets the profile attributes.
- Curriculum can contain requirements (covered in the Learning Extras section of this guide):
  - # of Hours
  - # of Hours from an Item Pool
  - # of Items from an Item Pool

Curriculum Status

A status of Complete is issued to the Curriculum when any of the following occur:

•All effective, required items and requirements are complete and all sub-Curricula are complete.

•The effective date of all required items and requirements is in the future.

•Some of the required items and requirements are complete and the remaining required items and requirements have an effective date in the future.

A status of —Incomplete is in effect when any of the following occur:

•A new Curriculum is assigned to Users and the effective date for any required items or requirements is in the past.

•Any effective, required item or requirement has not been completed.

•A completed item or requirement has a retraining period and the required by date is in the past.

•The Curriculum is modified with a new or revised item and the effective date is in the past.

Curriculum Creation

Lab 6. Add a New Curriculum

Step

1. Navigate to **Learning** > **Curricula**.

2. Click **Add New**.

Note: You can also enter **Add Curriculum** *into the Search field below the button bar and click* **Go**.

3. Enter a curriculum ID.

4. Enter a title for the curriculum.

5. Enter a description of the curriculum, if desired.

Curriculum Creation

6. Leave the creation date set to the default.

7. Select a domain.

8. Select a curriculum type from the drop-down menu.

9. Leave the **Force Incomplete** checkbox unchecked.

Note: *When you select the* ***Force Incomplete*** *checkbox, the system calculates whether the status should be complete or incomplete based on the user's latest attempt at completing the item. If the user's latest attempt is incomplete, the system calculates the expiration and required dates based on the date and time of the last unsuccessful attempt.*

10. Click **Add**.

Table 3. Related Area Options and Descriptions: Curriculum Record

Section	Description
Assignment Profiles	View/modify the assignment profiles that push the curriculum out to a target user population.
Catalogs	Associate catalogs to the curriculum that determines which users have access to the curriculum (and items) for self-assignment.
Contents	Associate items, requirements and subcurricula to the curriculum.
Documents	Associate related documents to the curriculum.
Job Codes	View the job codes to which the curriculum is tied.

Three date settings associated with items when used in Curricula:

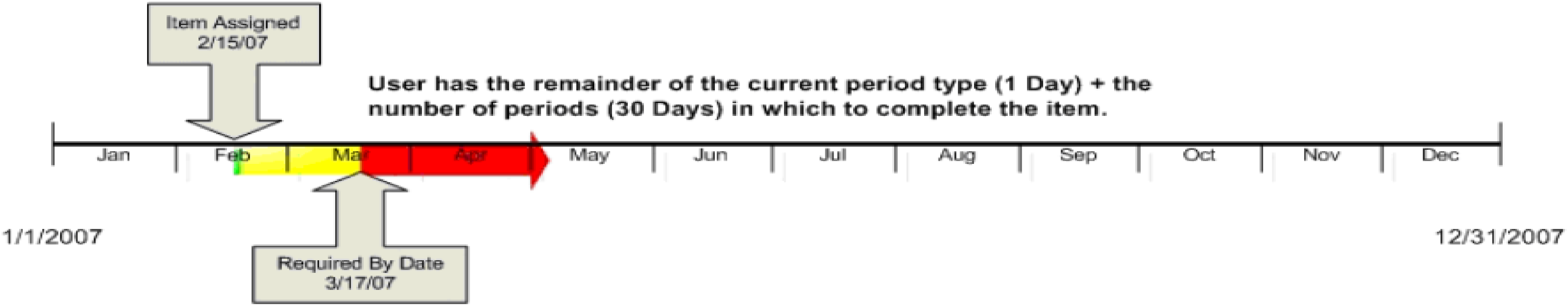
- Initial period, retraining period and effective date.
- initial and retraining period set at the item record level is inherited when the item is added to a Curriculum and may be modified per Curriculum. This will not change the default at the item level.
- Effective date is applied only to required items within the Curriculum, and essentially determines when the item is required for Curriculum completion. For example, in an existing Curriculum that is already assigned to Users and potentially already complete by some, administrators may want to add a new item to the Curriculum, but set the effective date to the future so Users have time to complete this item and remain compliant until that date. After the item becomes effective, it is required for Curriculum completion.

Period-Based Item Assignment (Initial Assignment)

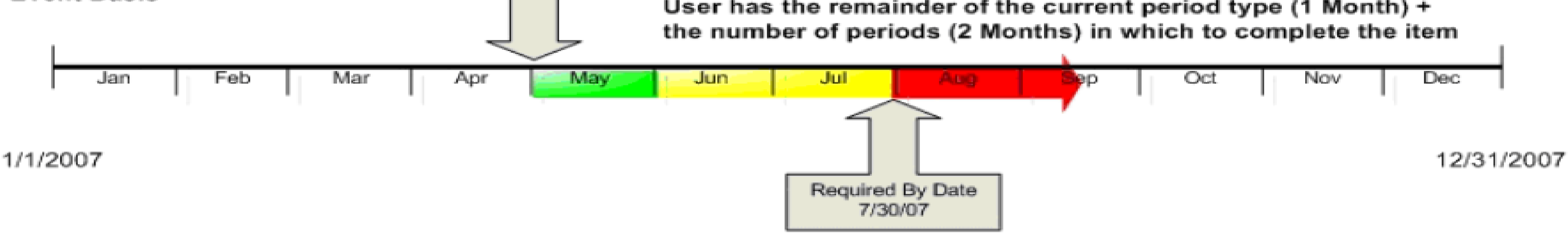
- Success Factors uses the Initial Period from the item record Design Data tab to calculate the required by date (due date).
- When items reside in a Curriculum, they may have a Retraining Period associated with them as well, which requires Users to complete the training on a recurring cycle in order to maintain Curriculum completion (compliance).
- There are two types of period basis settings to choose from: **Event Basis** and **Calendar Basis**.

Event Basis Initial Period Examples:

Required Item
Initial Number: 30
Initial Period: Days
Event Basis



Required Item
Initial Number: 2
Initial Period: Months
Event Basis



Event Basis

- Based upon the assignment date (or completion date for a retraining period) the User has X number of periods in which to complete the item, before it becomes overdue (item expiration email sent to User and supervisor, alert on home page).

- **The User always has the remainder of the current period type (e.g., 1 day, 1 week, 1 quarter, etc) + the number of periods defined.**

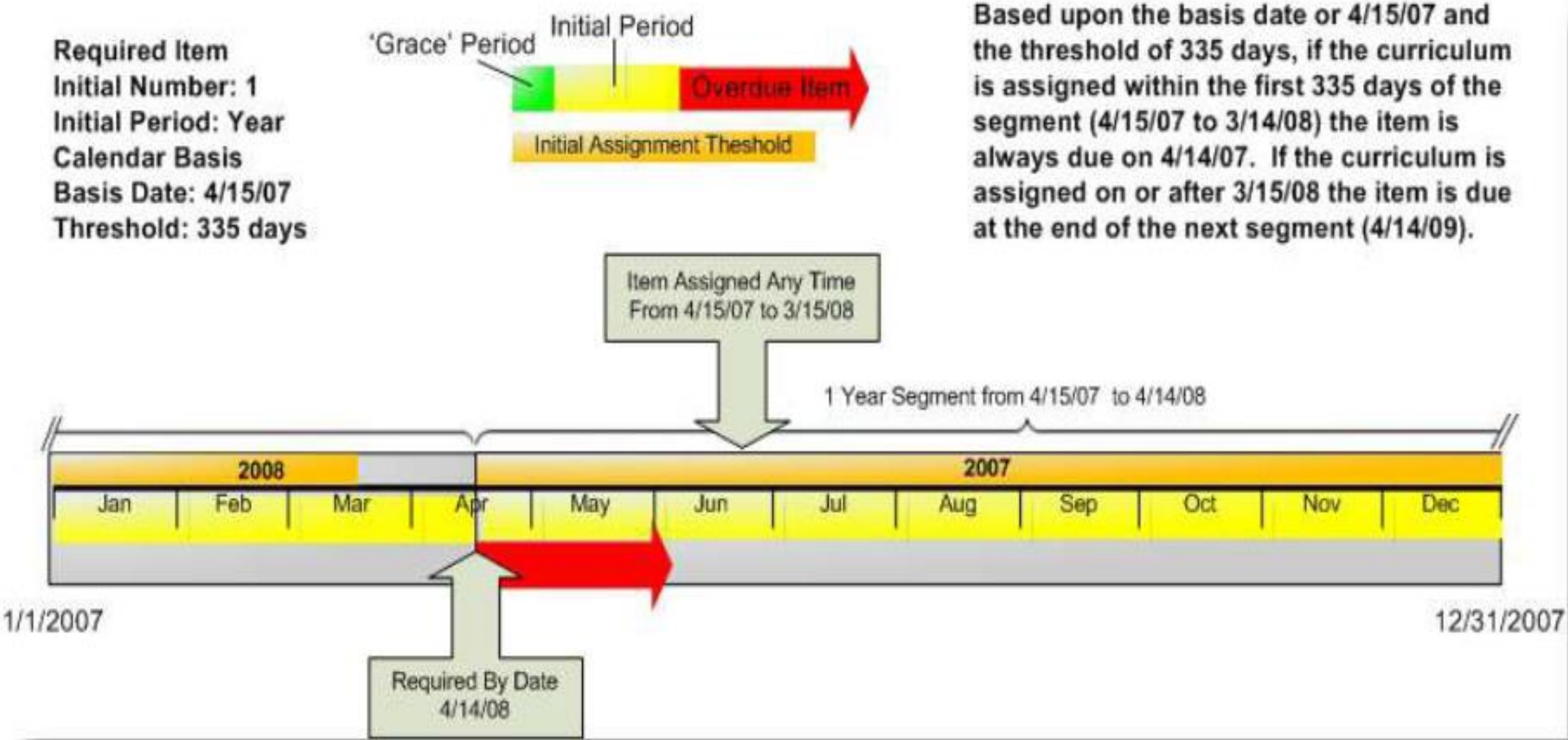
Calendar Basis

- Case 1 : Static
- Case 2 : Curriculum Assigned Within Initial Threshold
- Case 3 : Curriculum Assigned Outside of Initial Threshold – No grace period is available for user.

Eg: 2 month segment initial period, 30 days threshold – User has Grace period

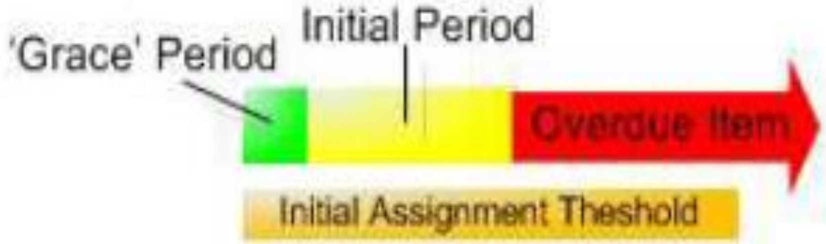
Calendar Basis Initial Period Example 1: "Static" Required by Date

Required Item
Initial Number: 1
Initial Period: Year
Calendar Basis
Basis Date: 4/15/07
Threshold: 335 days



Based upon the basis date or 4/15/07 and the threshold of 335 days, if the curriculum is assigned within the first 335 days of the segment (4/15/07 to 3/14/08) the item is always due on 4/14/07. If the curriculum is assigned on or after 3/15/08 the item is due at the end of the next segment (4/14/09).

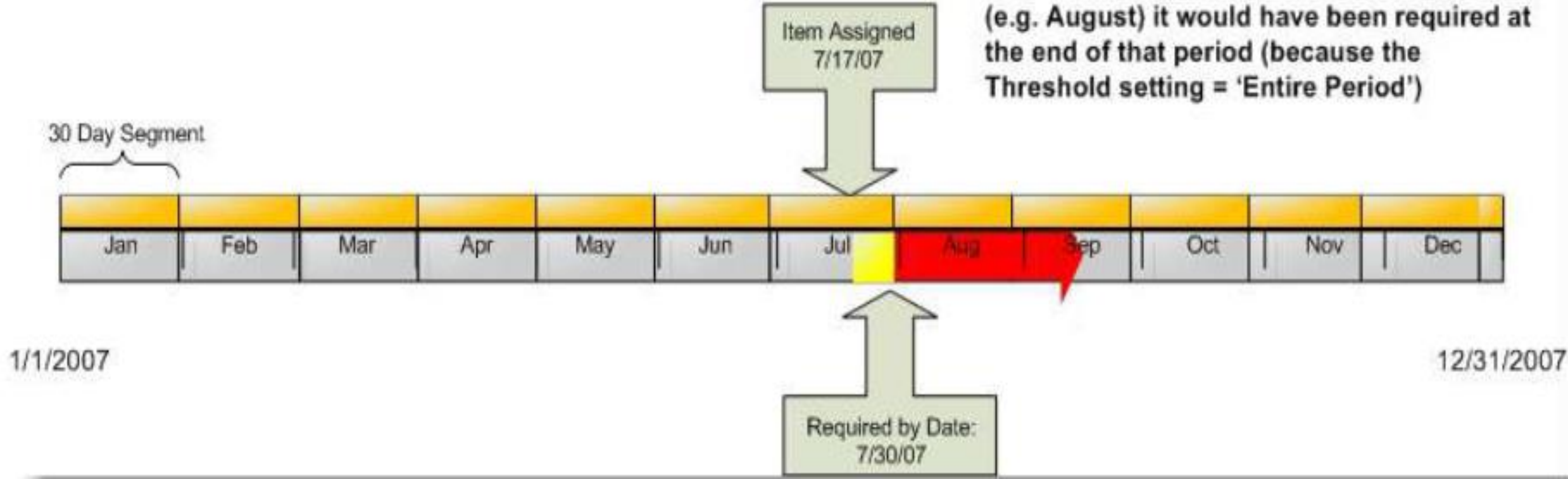
Calendar Basis Initial Period Example 2:
Curriculum Assigned Within Initial Threshold (Threshold = Entire Period)



Required Item
Initial Number: 30
Initial Period: Days
Calendar Basis
Basis Date: 1/1/07
Threshold: Entire Period

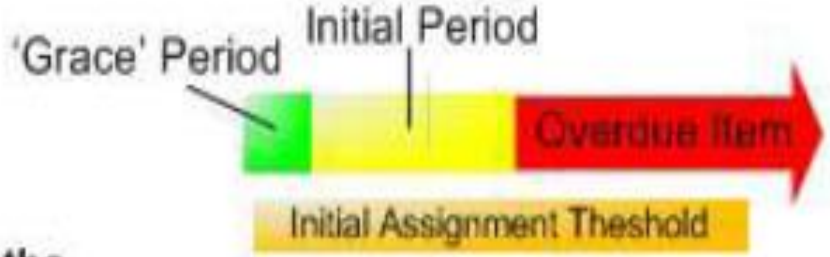
Based upon the calendar segments starting on the item basis date of 1/1/07, User has the remainder of the current segment (13 Days) in which to complete the item.

If the item were assigned in the next period (e.g. August) it would have been required at the end of that period (because the Threshold setting = 'Entire Period')



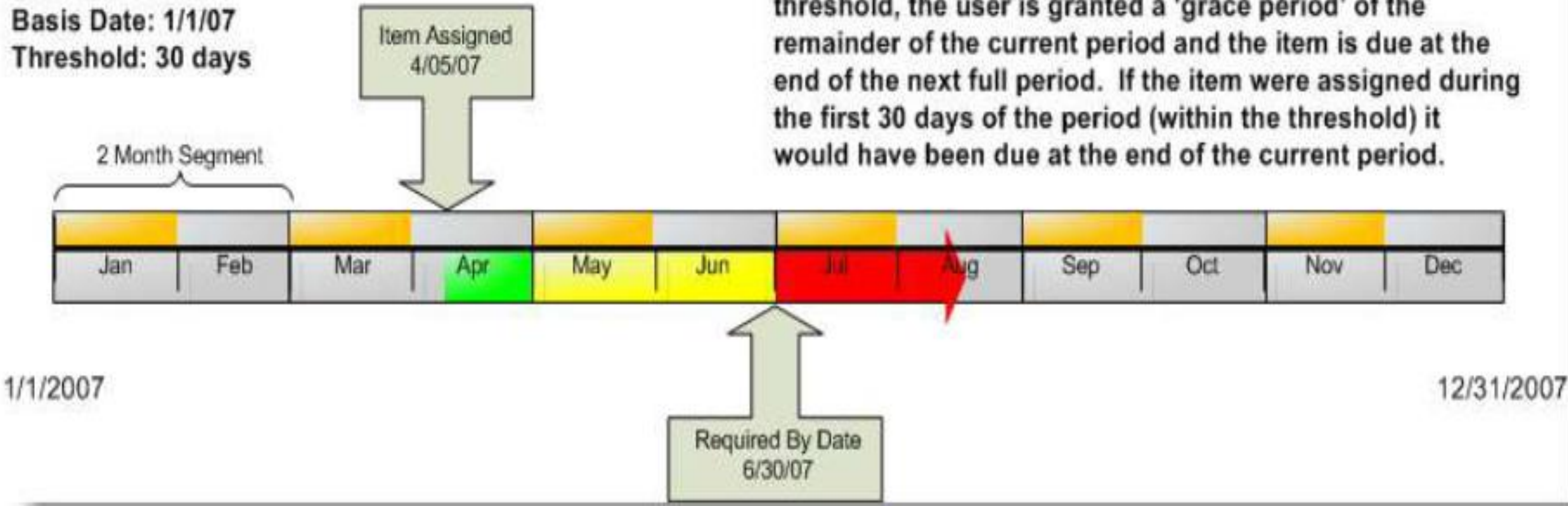
Calendar Basis Initial Period Example 3: Curriculum Assigned Outside of Initial Threshold

Required Item
Initial Number: 2
Initial Period: Months
Calendar Basis
Basis Date: 1/1/07
Threshold: 30 days



Based upon the calendar segments starting on the item basis date of 1/1/07, User has the remainder of the current segment (26 Days) + the next full segment (2 Months) in which to complete the item.

Because the item was assigned beyond the 30 day threshold, the user is granted a 'grace period' of the remainder of the current period and the item is due at the end of the next full period. If the item were assigned during the first 30 days of the period (within the threshold) it would have been due at the end of the current period.



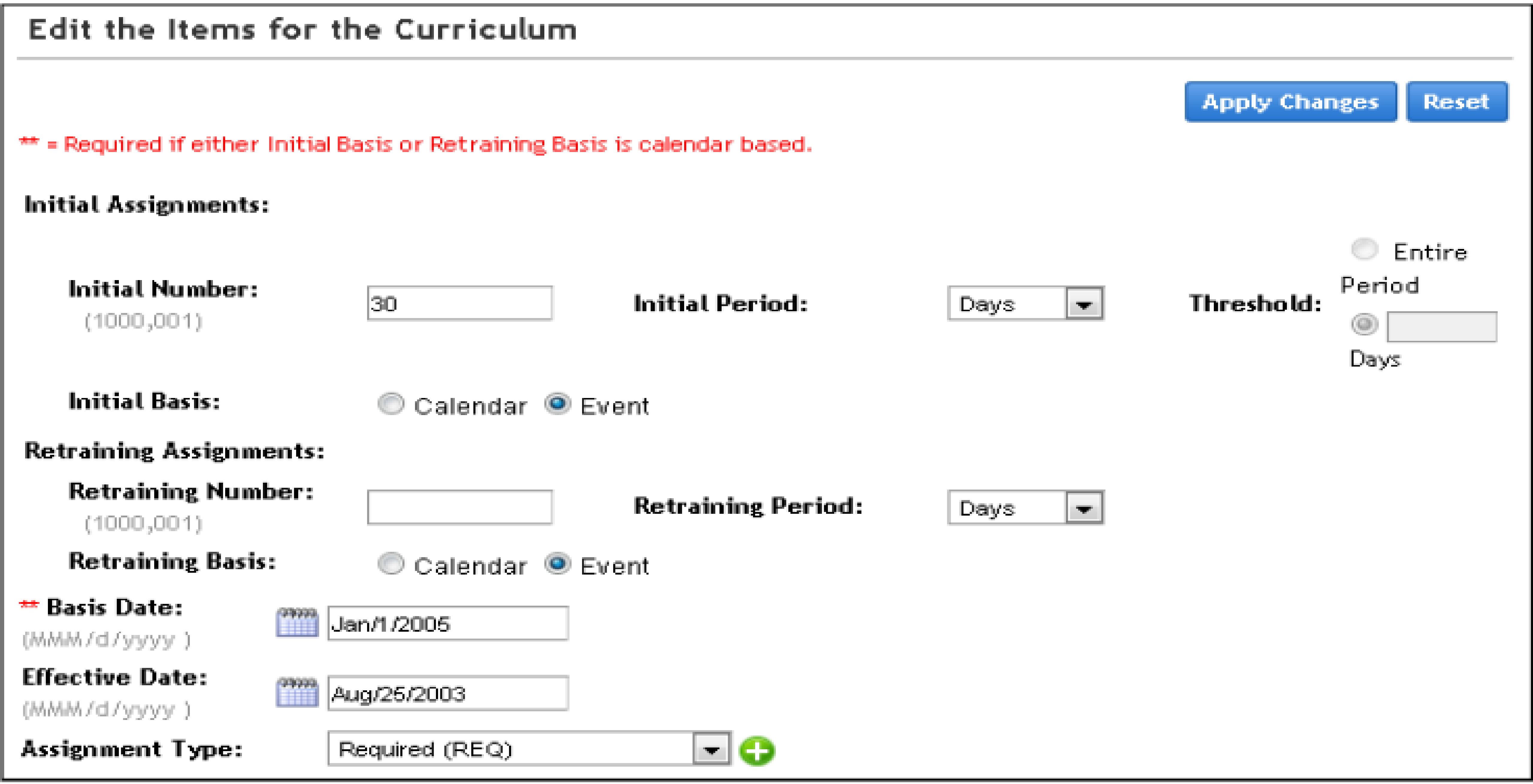


Figure 10. Edit Items for Curriculum Window

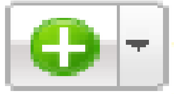
Lab 7. Associating Items to Curriculum

Step

1. Access the curriculum created in Lab 6.

2. Select the **Contents** tab in the Related area.

3. Click **Edit.**

4. Click the **Add Content** button ().

5. Select **Items** from the drop-down menu.

6. Enter criteria in the keyword field to search for the items to include in the curriculum.

7. Click **Search.**

8. Check the **Add** checkbox next to each item to add to the curriculum.

9. Click **Add**. The selected item(s) is added to the contents list.

10. Click the **Edit** link next to the last listed item:

    a. Enter initial assignments (number and period).

    b. Select an initial basis (event).

    c. Do not enter retraining assignments.

    d. Enter a basis date (if not defaulted) and an effective date (use the current date).

    e. Select an assignment type. Select **Required (REQ)**.

11. Click **Apply Changes**.

12. Click the **Move Up** ( ) arrow and **Move Down** ( ) arrow to sequence the curriculum content. This sets the suggested order display for users.

13. Click the X to close the Edit window and return to the curriculum record.

SF LMS Content Objects Workflow Group

Online Content

What is Online Learning?

Online learning refers to the electronic access of asynchronous training, such as a slide show presentation, an audio or video presentation, a web-based exam, or a document (e.g., a Standard Operating Procedure manual).

SuccessFactors Learning enables users to launch online content directly from their To-Do List and can automatically record learning events for completed online items.

Content objects are the building blocks of an online item. A content object is a pointer to a single, launchable file. For

It is important to note that the content object specifies the content location and launch method of communication with SuccessFactors Learning (e.g., AICC, SCORM, etc). It does not store the actual content.

Table 1. Terminology Equivalents

SuccessFactors Learning	SCORM	AICC
Content Object	Sharable Content Object (SCO)	Assignable Unit (AU)

SCORM is derived from AICC standards. One difference between SCORM and AICC is the definition of content structure. AICC requires four text documents:

- course (.crs)
- structure (.cst)
- description (.des)
- assignable units (.au)

On the other hand, SCORM uses a single manifest XML file to describe the content structure (imsmanifest.xml). This XML file includes greater detail about the content than the AICC text files.

Online Content Creation Process

Online Content Creation Process …Cont

4. Add content objects/content packages in SuccessFactors Learning.
5. Add an item in SuccessFactors Learning.
6. Assign the online content to the item during item creation or under the Online Content tab from the Related area of the item record in SuccessFactors Learning.
7. Test the online item from the SuccessFactors Learning user application.
8. Assign the item to a catalog and/or to the user's To-Do List (Learning Plan).

Content Object Records

Field	Description	Notes	Displays to User
Title	Indicates the name of the content object and is used in searching.		
Domain	Identifies admin ownership of the record.		
Build User	Identifies the person who created the content.		
Build Company	Identifies the company that created the content.		
Build Location	Identifies where the content was created.		
Build Date	Indicates the final build date of the content.		
Content Object is active	Indicates that the content object is available/unavailable for item assignment.		
Content Object is online	Indicates whether the content object is available to users.		
Description	Describes the purpose/location of the content object to users.		
Developer Tool	Indicates the software tool used to develop the content.		
Mastery Score	This is the score required by the user to COMPLETE the selected content object (NOT the Item), and be awarded the COMPLETED status for the corresponding content object. If the Mastery score indicated here is not achieved by the user, the system marks the content object as FINISHED.		

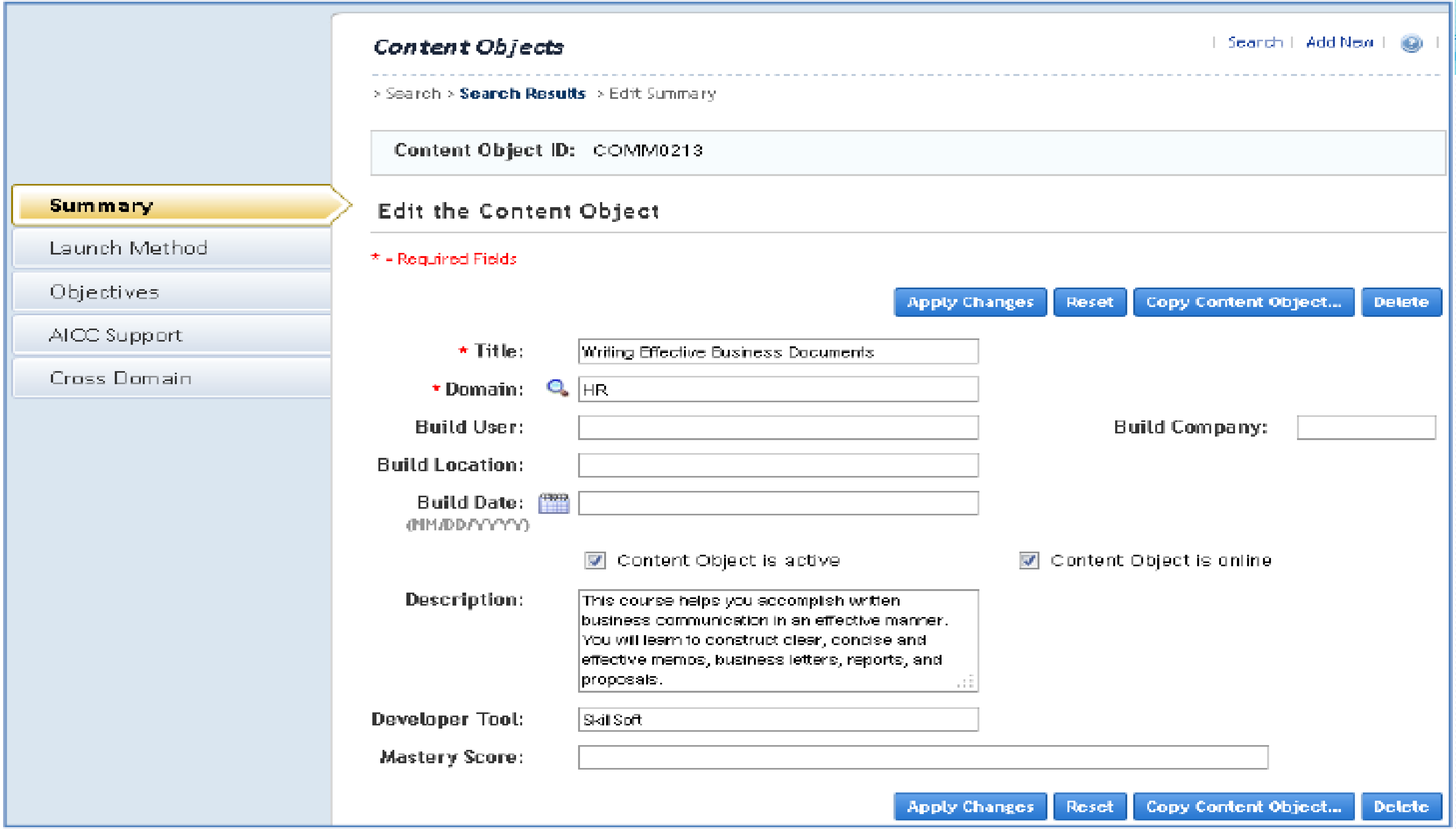


Figure 1. Content > Content Object Record > Summary Tab

SF Learning Integration Configurations and Setup

SF Bizx Integration Integration with SF LMS

- Provisioning Settings
- Bizx Settings
- Super Admin settings
- SFTP Server

Provisioning Settings - Step 1

- Enable Learning Integration – Inside Company settings

SuccessFactors Learning Integration URI = https://Variable-stage.plateau.com

SuccessFactors Learning Integration API URI = https://Variable-stage.plateau.com

https://client-stage.plateau.com/learning/admin/nativelogin.jsp

Step 2 - Authorized SP Assertion Consumer Service Settings

- Service Provider Settings
- Authorized SP Assertion Consumer Service Settings

https://client-stage.plateau.com/learning/saml/SSO
https://client-stage.plateau.com/learning/saml/SingleLogout

Login in to Bizx : Create a user PLATEAU1

Roles: LMS Administrators, LMS End Users -> Provide Permissions for roles

Create Groups LMS Administrators – Add user PLATEAU1 TO Group LMS Administrators, Assign the group to role LMS Administrators

Step – 3 Settings in Stand Alone Link

- Login in to stand alone link : Super admin id and password is provided

https://client-stage.plateau.com/learning/admin/nativelogin.jsp

User name : PLATEAU, Pass word :PLATEAU

System admin -> Application Admin -> Admin Management

Create the Admin and End user : PLATEAU1

Add the Related User from Users search

If PLATEAU1 user is not there please create one (User – Add New)

Step 4 – Super Admin

- System administration - > Configuration - > System Configuration -> Bizx

1. successFactorsLearningEnabled=true
2. baseURL=https://performancemanager10.successfactors.com
3. successFactorsCompanyID=Client
4. baseRESTAPIURL=https://performancemanager10.successfactors.com
5. metadataProviders[IDP1].value=https://performancemanager10.successfactors.com/idp/samlmetadata?company=Client

Step 5

- System administration - > Configuration - > System Configuration -> Connector

Bizx System

Sftp
Text File of User data

SF LMS

Job 1 : Export users from Bizx to SFTP, Provisioning

Import users from SFTP to lms, LMS Stand Alone

Job 1:

- Job Defenition : Job Name , Job Owner : PLATEAU, Job Type : Employee export, character ENCODING: UTF 8
- Server access:

URL: https://sftp10.successfactors.com

User : 7724688T

Pwd : kdTrac5EEXAr

File path and File Name :

File path : /incoming

File Name : user_data_thrivenieaT1.txt

Job Occurrence and Notification

Job 2 :

- Assign role all_ connector in system
- Check Connector Properties, System administration -> Configuration -> System configuration -> Connectors

- Connector Properties and Field Mapping
- System administration -> Connectors -> SF USER Connector -> Schedule Job

Possible Errors

- File Not Found – File Name
- Prefix , connector.input.file.name.tenant.suffix.enable=true
- Materialized View Error – Standard SF Error
- Maintain Email id Correctly abc@xyz.com
- Create Country

LMS and Bizx Configurations

- In the LMS, the necessary configuration settings are defined in the SF Learning Admin user interface (Found under *Learning Administration > System Admin > Configuration > System Configuration > BizX)*.
- In BizX the respective settings have to be made on the customer provisioning page (e.g. https://qacand.successfactors.com/provisioning_login).

Integrating SF Learning with BizX – Configuration Steps

On the LMS Side

•Install Learning-only license and BizX Connectors license (on SF Learning)

•Provisioning access to the BizX instance

•BizX Core is used as the source system for basic user data in SF Learning (refer to the BizX User Connector workbook for field mappings). Any updates made to common fields directly on SF Learning will need to be manually updated in the BizX Core application, i.e. user updates don’t flow from the LMS to BizX.

•BizX Core user IDs must match the SF Learning user IDs (and where applicable, the SF Learning admin IDs) in order to utilize the SAML SSO solution.

•<SF_DOMAIN> and CompanyID have been obtained by BizX Prod Ops (e.g. <SF_DOMAIN> = performancemanager.successfactors.com, CompanyID=CustomerProd).

•<LMS_TENANT_DOMAIN> is known

Integrating SF Learning with BizX – Configuration Steps

On the BizX Side

•Make sure a Company ID for the tenant has been created by BizX's Product Operations

•Make sure the <LMS_TENANT_DOMAIN> is known

•Configure expected Learning activity statuses ("Planned" and "Completed")

•If the **standard security model** is used, follow these steps:

- Grant the "Learning Access Permission" under Admin > Manage Security for Learning User Access
- Grant "Learning Admin Access" permission under Admin > Administrative Privileges > Manage Security to display the Learning Admin Link
- Grant "CDP Access" under Admin > Manage Security to allow users to access CDP
- Grant "Jam Access"
- Set the corresponding permissions in Admin > Manage Security > Default User Permissions

These values are obtained through the provisioning request	
SF_DOMAIN	performancemanager.successfactors.com
SF_COMPANY_ID	CustomerProd
LMS_TENANT_DOMAIN	lmsdomain.com
LMS_TENANT_ID	LMSTEST
LMS .properties files	
baseURL	https://performancemanager.successfactors.com
successFactorsCompanyID	CustomerProd

Configuring the Learning Menu Using Role Based Permissions

- To grant **users** with permissions to the “Learning Access” tab under *Administration Tools*, navigate to:
- Manage Employees
- Set User Permissions
- Manage Permission Roles
- <select a role>
- Permission Settings
- User Permissions
- Learning
- <select> the *Learning Access Permission* checkbox

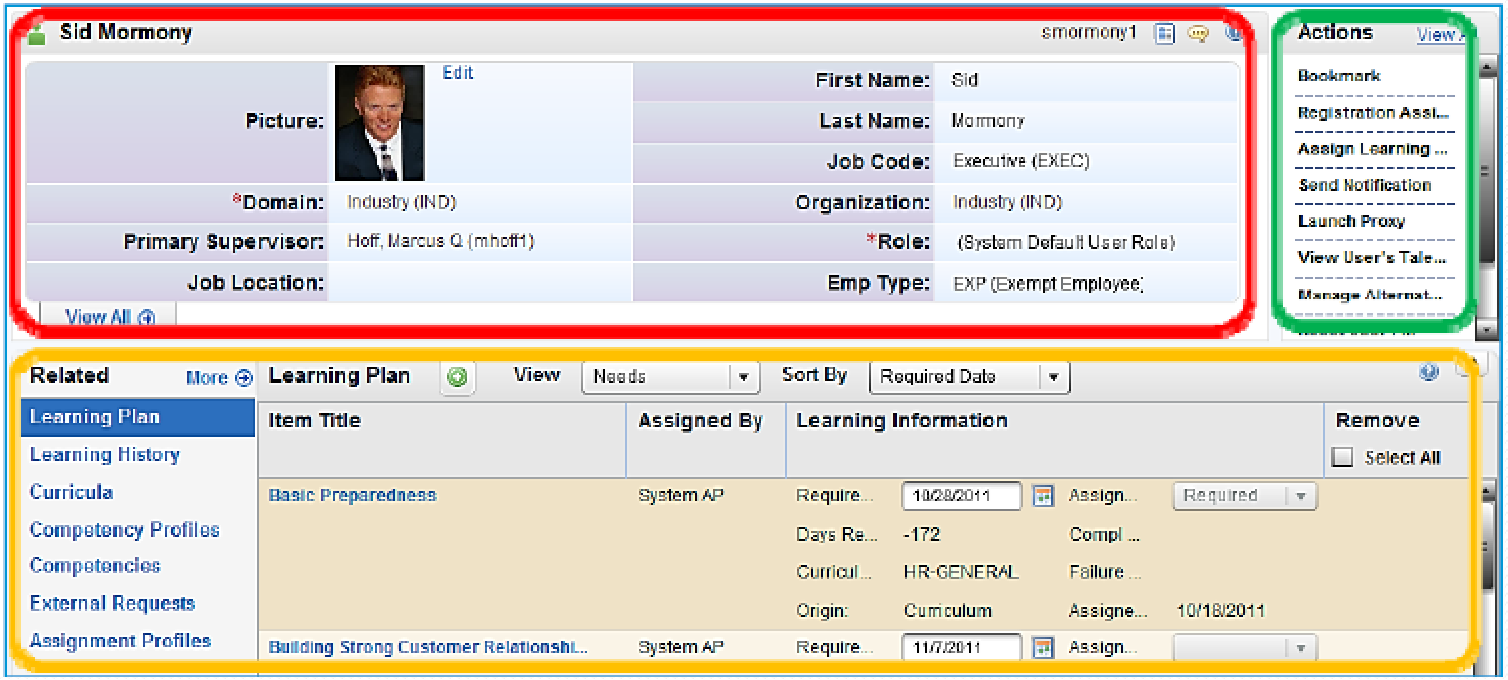
- To grant **admin users** “Learning Admin Access” permissions under *Administration Tools*, navigate to:
- Manage Employees > Set User Permissions > Manage Permission Roles > <select a role> > Permission Settings > Administrator Permissions > Manage Learning > <Select> the *Learning Admin Access Permission* checkbox

SL LMS USER MANAGEMENTWORKFLOW

User Management

- Users are represented by database records which contain not only detailed demographic information but also about trainings which they are actually assigned.
- Individual must have a User record in Success Factors Learning.
- User Connector.
- Assignment Profiles.

User Management



User Management

- Navigation Step for User Management Configuration
- References > User Management > Corresponding Attribute.
- Click Add New
- Enter Corresponding attribute ID and description.

User Management

Shown below is how Employee Types are configured.

References > User Management > Employee Types

Click Add New

Enter Employee Type ID : *SL1*

Enter Description: Associate with employee subgroup SL1

User Management

User Attributes

- User Status
- Gender
- Job Title
- Job Locations
- Gender
- Job Title

Locate User Record

Lab 1. Locate and View a User Record

Step	Action
1	Navigate to **Users > Users**.
2	Enter your search criteria in the appropriate textboxes.
3	Click **Search**.
4	Locate your user from the search results list.
5	Click a user ID to open the record.

Add a User Record...Cont

Step	Action
	g. Enter the number of years/months of prior service. h. Enter the location of the user's resume. i. Enter a hired date. j. Select a related instructor, if applicable.
7	In the Address section: a. Enter an e-mail address for the user.
8	Click **Add**.
9	Record the user ID.

Assignment Profiles

- Items -> Catalogs -> Assignment Profiles -> Users
- If users match the values defined in Assignment profile , they will have the corresponding Training items in their learning plan.
- Assignment profile attributes are as follows: Domain, Location, Country, Legal entity, Division.

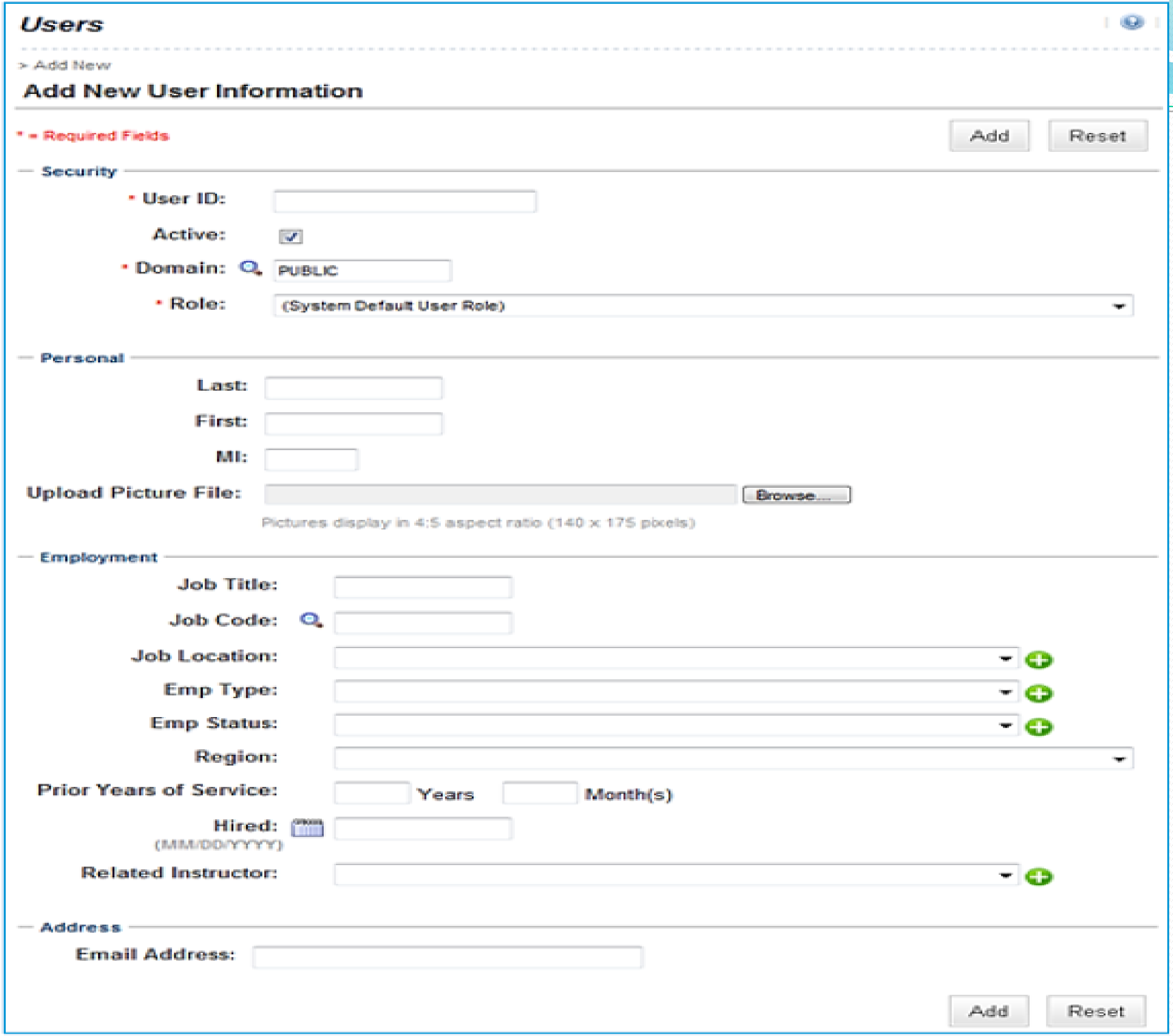


Figure 68. Adding a New User Record