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SPRK 4001 - Spark LMS: Administration Tools (Creating & Configuring Items)

In this session, participants will review the step-by-step process of creating, copying, editing and revising an Instructor-Led Item in the new Spark Learning Portal. Participants will review the related terminology associated with this process. All SJCD employees must complete this session prior to receiving access to the Learning Administration Tools, which are available in the Spark Learning Portal.

Level One

- How to Add an Instructor-Led Item
- Identify Item Classification and Review Summary Tab
- Configure Item: Core Area > View All
- Configure Item: Default Segments (Related Area)
- Configure Item: Catalogs (Related Area)
- Configure Item: Subject Areas (Related Area)
- Configure Item: Notifications (Related Area > More)
### Job Aid: Add New Item

### Description
The purpose of this job aid is to guide administrators through the step-by-step process of creating an instructor-led item. Related terminology is provided.

### Task
- **A. Add an Instructor-Led Item**

### Terminology:

**Item Type (Reference):** This is a globally-defined reference that helps categorize items. When administrators create a new item, they 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.

**Revision Date/Time:** SuccessFactors Learning automatically populates these fields if an admin leaves them alone when creating a new item. If needed, the admin can manually enter data into these fields. This field is what uniquely identifies an item that has been revised.

**Classifications:** Classifications are automatically assigned based on whether the item has segments and online content.

**Instructor-led Item:** A course that is offered in a classroom or part of on-the-job training. Completion is manually entered, tracked, and reported within the system.

**Online Item:** An item that is offered, deployed, tracked, and completed online through the learning system.

**Blended Learning Item:** A course that offers a combination of instructor-led training and online content.

**Other Item:** An item that is neither scheduled or has online content, such as physical goods.
Task A.  Add an Instructor-Led Item

1. Navigate to Learning > Items.
2. Click the Add New link.
   or
3. Enter “Add Item” in the Search box.

The Add New Item wizard displays.

3. Click Scheduled Only to create an instructor-led, scheduled item.
4. Click OK.

5. Select the Item Type from the drop-down menu.
6. Enter an Item ID and Item Title.
7. Enter description.
8. Enter or select a Domain ID.
   Scroll window down.

*Note: Required fields for the item are marked by an asterisk (*).
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Click the plus icon (➕) to expand additional options. Enter a revision number.</td>
</tr>
<tr>
<td>10</td>
<td>Select Approval required to self-register if applicable.</td>
</tr>
<tr>
<td>11</td>
<td>Select an approval process. Enter contact hours, credit hours, and/or CPEs as they apply.</td>
</tr>
<tr>
<td>12</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** By default the system will auto-populate a revision date and time with today’s date and time.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The Catalogs tab is selected in the Related section.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the Add New Catalogs (➕) button.</td>
</tr>
</tbody>
</table>

Scroll window up.
*Enter Schedule Template information.*

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>Select number of days. Enter hours per day.</td>
</tr>
<tr>
<td>15</td>
<td>Click Go To Advanced Schedule for more complex schedule requirements.</td>
</tr>
<tr>
<td>16</td>
<td>Click Save &amp; Exit.</td>
</tr>
</tbody>
</table>

A new item has been created.
If enabled, a recommended next step dialog appears.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>Click Add Catalogs.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td></td>
</tr>
</tbody>
</table>
The Catalogs search screen appears.

20 Enter a keyword (or add additional search criteria).

21 Click Search.

Review search results.

22 Check Add Schedules checkbox to allow users to self-register for future scheduled offerings of the item in the user interface.

23 Check Add to add the newly created item to the selected catalog.

24 Click Add.

The newly created item is associated with a catalog.

25 The catalog options can be configured to include a flag for the item, the reason for the flag, the date the flag expires, the item expiration date in the catalog.

26 Click Save.

Note: If a flag is applied, an ‘until’ date is required.

Return to the recommended next step dialog.

27 Click Add Subject Areas.
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>28</td>
<td><strong>Note:</strong> The Subject Areas tab is selected in the Related section. Click the Add New Subject Areas ( ) button.</td>
</tr>
<tr>
<td>29</td>
<td>A list of subject areas displays. Page through the list to select the subject area. or Scroll up to view the Catalogs search screen. Enter a keyword (or add additional search criteria). Click Search.</td>
</tr>
<tr>
<td>30</td>
<td>Review search results. Check Add to add the subject area to the item. Click Add.</td>
</tr>
<tr>
<td>31</td>
<td>The newly created item now has one or more catalogs associated with the record.</td>
</tr>
</tbody>
</table>

Reference: To learn more about scheduling items, refer to the Scheduling course and job aid(s).
**Job Aid: Edit Instructor-Led Items**

<table>
<thead>
<tr>
<th>Topic: Learning Needs Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adding Information to an Item’s Core Area</td>
</tr>
<tr>
<td>Working with Item Default Segments</td>
</tr>
<tr>
<td>Adding an Item to a Catalog</td>
</tr>
</tbody>
</table>

**Description**

The purpose of this job aid is to guide administrators through the step-by-step process of editing an instructor-led item. Related terminology is provided.

**Tasks**

A. Identify Item Classification and Review Summary Tab  
B. Configure Item: Core Area (Core Area > View All) 
C. Configure Item: Default Segments (Related Area)  
D. Configure Item: Catalogs (Related Area)  
E. Configure Item: Subject Areas (Related Area)  
F. Configure Item: Notifications (Related Area > More)

**Terminology:**

**Classification:** Classifications are automatically assigned based on whether the item has segments and/or online content. There are four classifications in the system: Instructor-led, Online item, Blended (includes both online content and instructor-led content), and Other (such as physical goods).

**Core Area (View All):**

**Summary:** The core area contains the basic information of the item record.

- Domain  
- Classification  
- Contact’s email (this works with the Item Scheduling Demand APM)

**Extended Summary:** Information in this section includes:

- Default Minimum Registration: When the number of users who have requested registration for this item reaches this number, an email is sent to the contact (found in summary section) to recommend scheduling this item.  
- Default Maximum Registration  
- Source  
- Enable Self Registration
Design: Information in this section includes:

- Default credit hours
- Default Initial Assignments: These fields determine how long a user has to complete an item from when it was placed on his/her Learning Plan/To-Do List.
- Default Retraining Assignments: Length of time users have to take and complete an item after they initially complete the item. These fields are used only when the item is assigned as part of a curriculum.

Process Control:

- Enable user requests
- Enable supervisors can record learning events
- Enable/disabled users can record learning events

Related Area:

- **Segments Tab:** A segment is used to establish schedule timeframes and identifies location types, materials, and types of equipment for scheduling an instructor-led course.
- **Catalog Tab:** A catalog is used to make items that are not a part of the Learning Plan viewable to users. Access to one or more catalogs is based on assignment profiles. In order for a user to view an item that is not in his/her Learning Plan, the admin must add the item to a catalog. An item may reside in multiple catalogs and have a different price associated in each. In order for a user to self-assign an item or self-register in a scheduled offering of an item, the item must reside in a catalog.
- **Subject Area Tab:** Users have the ability to browse catalog/s by subject area. An item can be associated with one or more subject areas.

**Related Area (More):**

- **Notification Tab:** Users have the ability to change the message within the notification associated with an item and to attach additional documents to the notification such as pre-reading or work.

**Tip:** Due to the highly configurable options of the item record fields displayed will vary.

*System administrators can define the default record configuration ([System Admin>Configuration>Record Configuration]) and administrators can modify that default configuration by clicking the Personalize button ( ) in the header bar.*

*Every administrator can personalize the record without affecting the choices of any other administrator.*
Task A. Identify Item Classification and Review Core Information

1. Log in to SuccessFactors Learning as an admin.
2. Navigate to Learning > Items.
3. Enter search criteria for an item to edit.
4. Click Search.
5. Enter search criteria into the top Search field.
6. Click Go.

7. From the search results, click the Item ID.

8. The top of the record displays the items title, ID, description, and item key.

9. The item classification is identified in the core information section.

Note: 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).

10. View and enter additional core information by clicking View All.

Note: The core area contains the basic information of the item record, including the item title, item key, description, and classification.
### Task B. Configure Item: Summary Area (Core Area > View All)

1. Click the **View All** link in the core area of the item record.

   ![View All Link](image)

   **Note:** Your display may vary depending on your personalized configuration.

2. The Additional Settings pop-up displays.

3. The **Summary** section is listed first.

4. To edit any field, click in a displayed field and enter text or select a reference value (depending on the field type).

   ![Summary Section](image)

   **Note:** Your display may vary depending on your personalized configuration.

5. An alert icon (●) will appear if data entered into a text field does not match the field.

   ![Alert Icon](image)
5 Scroll down to the Extended Summary section.

6 Click the Max Registration field and enter a default number of maximum users that should be enrolled when the item gets scheduled.

7 Click the Min Registration field and enter a default number of minimum users that should be enrolled when the item gets scheduled.

Note: Your display may vary depending on your personalized configuration.

8 Click the Source field and select Internal (INT) from the drop-down menu.

9 Click the Self Registration field and select Yes from the drop-down menu (if not already selected by default).

10 Scroll down to the Design section.

Note: Use this section to review and revise design information of the selected item including the default credit values of the item, default initial period, and default retraining interval.

11 Click the Initial Basis field and select Event.

12 Click the Initial Period field and select Days.

13 Click the Initial Number field and enter 30.

Note: Click the Help link for more information on period-based item assignments.

Note: Your display may vary depending on your personalized configuration.

Tip: Any of the defaults that are defined on this page can be overridden in the individual scheduled offerings or learning events involving this item or any curricula in which the item may be included.
Scroll down to the Process Control section.

Click the Enable User Requests field and select Yes (if not already selected by default).

Click the Supervisors can record Learning Event field and select No (if not already selected by default).

Click the Users can record Learning Event field and select No (if not already selected by default).

Click Save. The Additional Settings page closes.

---

**Task C. Configure Item: Default Segments (Related Area)**

Using the same item record as above, select the Segments tab in the Related section of the record.

Click the arrow icon (▲) to expand the Related section. (Click the arrow icon (▼) again to collapse the Related section.)
Enter a description for each existing segment.

Change the duration for each segment as necessary.

Select a Location Type from the drop-down menu.

Click the Equipment link to associate equipment with the segment.

Click Copy to All link to apply that segment configuration to all segments (use only if you expect all segments to be identical).

Click Save.

Click ( ) to add a new segment.

Enter a Day, Description, Duration, Delay Start and Location Type as necessary.

Click Save.

The new segment has been added.

Click ( ) to copy a segment.
Enter the number of times to copy the segment. Click Copy.

The previous segments have now been copied and added to a new Day 3 and Day 4.  
Note: To remove one or more segments, select the Delete checkbox, and click Save.

Task D. Configure Item: Catalogs (Related Area)

1. Using the same item record as above, select the Catalogs tab in the Related section of the record.
2. Click the arrow icon (✧) to expand the Related section. (Click the arrow icon (✧) again to collapse the Related section.)
If the item is associated with a catalog already, the catalogs will be listed.

3 Click (a) to add associate the item with a new catalog.

4 Enter a keyword.
5 Click Search.

**Note:** To use additional search criteria, click the Add/Remove Criteria button.

6 Select the Add Schedules and Add checkboxes.
7 Click Add.

8 To modify catalog options, click the Flag drop-down box and select one of the displayed options.
9 Enter an Until date.
10 Enter a Reason.
11 Enter an expiration date (if desired).
12 Click Save.

**Notes:**

*Item Flag:* A flag that appears with the item in the catalog.

*Until:* The date that the flag no longer appears with the item in the catalog.

*Reason:* What the user sees for why they should be interested in this item when viewed on their home page or in the catalog.
Dismissed: The date at which the item is automatically removed from the catalog. It is automatically removed after this date from the catalog by the purged expired catalog APM.

Task E. Configure Item: Subject Areas (Related Area)

1. Using the same item record as above, select the Subject Area tab in the Related section of the record.

2. Click the arrow icon (▲) to expand the Related section. (Click the arrow icon (▼) again to collapse the Related section.)

If the item is associated with a catalog already, the catalogs will be listed.

3. Click (▲) to associate one or more subject areas with the item.
4. Check the Add checkbox to add a subject area.
5. Click Add.

Verify the subject areas added appear on the screen.

**Note:** Users can search for items based on subject area.

**Task F. Configure Item: Notifications (Related Area More)**

1. Using the same item record as above, select the More link in the Related section of the record.
2. Additional related tabs display.  
Select the Notifications tab.

3. In the section *Override Learning Expiration Notification Defaults*, select the email recipients, threshold, and reminder period.

**Note:** After you add a new item, you can change these default values and selections. When the automatic process executes, the system uses the values and settings of the item.
This page allows you to review and change the content of notifications sent to users, instructors, supervisors, and others (specified in the Contacts tab) regarding this item.

The following notifications are available:
- Scheduled Offering Cancellation
- Registration
- Withdraw
- Waitlist
- Waitlist Removal
- Pending

Make necessary edits to the notification subject line and body.

Click Preview to view a sample of the notification.

Click Apply Changes.

To add an attachment, click Browse... to search for and add a file.

Click Apply Changes once the correct path to the attachment displays.

Note: For examples about the use of Notification Template and building messages using syntax tags, click the Help link.
SPRK 4002 - Spark LMS: Administration Tools (Managing & Editing Items)

In this session, participants will review the step-by-step process of editing and adding prerequisites to an instructor-led item in the Spark Learning Portal. All SJCD employees must complete this session prior to receiving access to the Learning Administration Tools, which are available in the Spark Learning Portal.

Learning Objectives:

- Copy an Existing Instructor-Led Item
- Revise an Existing Instructor-Led Item
- Create a Prerequisite Item (Course)
- Create Draft Survey - Evaluations Surveys
- Add Questions - Evaluations Surveys
- Configure Options and Notifications – Evaluations Surveys
- Preview and Publish Survey – Evaluation Surveys
- Associate Survey with Item – Evaluation Surveys
- Associate Item with Survey – Evaluation Surveys
- Create Document Objects
- Associate Content Object with Item Documents
**Job Aid: Copy an Item**

**Topic: Learning Needs Management**

**Job Aid: Copy an Item**

**Description**
The purpose of this job aid is to guide administrators through the step-by-step process of copying an item.

**Tasks**
A. Copy an Item

---

**Task A. Copy an Item**

1. Navigate to Learning > Items.
2. Enter criteria to search for the item you wish to copy.
3. Click Search.
4. Open the item you wish to revise by clicking the item ID.
In the **Actions** section, click **Copy**.

Select a new Item Type ID.

Enter a new Item ID.

A new revision timestamp defaults to today’s date and time.

Choose the kind of data that you want to move from the original item to the new item.

Click **Copy**.

The new item is created.

Recommended next steps appear.

Edit the new item title by clicking the field.

Modify other item data, as necessary (description, source, method, assignment type, create date, etc).
<table>
<thead>
<tr>
<th><strong>Job Aid: Managing Prerequisites</strong></th>
<th><strong>Course: Learning Needs Management</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Topic Lab: Establish a Prerequisite Relationship</strong></td>
</tr>
</tbody>
</table>

### Description

The purpose of this job aid is to guide administrators through the step-by-step process of creating prerequisite item relationships. Related terminology is provided.

### Task

A. Create a Prerequisite Item

### Terminology:

**Prerequisite:** Items that must be completed before the current item can be attempted.
Task A. Create a Prerequisite Item

1. Navigate to Learning > Items.
2. Enter criteria and click Search to find an item to which a prerequisite will be added.

3. Click the item ID link.

4. Select the Prerequisites tab from the Related area of one of the items.
5. Click Add New Prerequisites ( ).

6. Enter criteria to search for the prerequisite item.
7. Click Search.
Check the **Add** checkbox.
Click **Add**

The prerequisite item information displays.
### Description

The purpose of this job aid is to guide administrators through the step-by-step process of creating an item evaluation survey.

### Tasks

A. Create Draft Survey  
B. Add Questions  
C. Configure Options and Notifications  
D. Preview and Publish Survey  
E. Associate Survey with Item  
F. Associate Item with Survey

#### Task A. Create Draft Survey

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 and comments.
7. Select domain.
8. Check **Active** checkbox.
9. Click **Add**.

The new questionnaire survey is created.
Task B. Add Questions

Note: It is important to keep in mind the type of training event this survey will be used to assess. Ensure that the questions being asked are applicable. For example, a set of questions on how well an instructor kept the class engaged might not apply to an online course.

1. Click the Questions tab for the questionnaire survey previously created.

2. Enter survey instructions.

3. Enter first page title.

4. Enter first page instructions.

5. Click the Add Question icon ( ).
6. Enter question stem.
7. Select question type (for this example select rating scale).
8. Select a rating scale.
9. Click Add Question icon ( ) to add additional questions to this page.
10. Click Add Page icon ( ) to add an additional page.

11. Enter second page title and second page instructions.
12. Repeat steps above to add questions to this page.
13. Click Save Draft.
### Task C. Configure Options and Notifications

1. Select the **Options** tab for the questionnaire survey created.
2. Select the anonymous survey option.
3. Enable option for survey required for item completion.
4. Enter number of days to complete survey from assignment.
5. Select option to include comments field for each question.
6. Click **Apply Changes**.

<table>
<thead>
<tr>
<th><img src="image" alt="Questionnaire Surveys" /></th>
<th><img src="image" alt="Questionnaire Surveys" /></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Questionnaire Surveys</strong></td>
<td><strong>Questionnaire Surveys</strong></td>
</tr>
<tr>
<td><img src="image" alt="Options" /></td>
<td><img src="image" alt="Notifications" /></td>
</tr>
<tr>
<td><img src="image" alt="Summary" /></td>
<td><img src="image" alt="Questions" /></td>
</tr>
<tr>
<td><img src="image" alt="Questions" /></td>
<td><img src="image" alt="Item Usage" /></td>
</tr>
<tr>
<td><img src="image" alt="Item Usage" /></td>
<td><img src="image" alt="Options" /></td>
</tr>
<tr>
<td><img src="image" alt="Options" /></td>
<td><img src="image" alt="Notifications" /></td>
</tr>
<tr>
<td><img src="image" alt="Notifications" /></td>
<td></td>
</tr>
</tbody>
</table>

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

1. Select the **Questions** tab.
2. Click **Preview**.
3. Select **Draft** from drop-down menu.

4. Review preview of survey.
5. Click **Close** to close preview of survey.

6. Click **Publish**. The survey is now ready for use.
**Task E. Associate Survey with Item**

1. Select the **Item Usage** tab.
2. Click the **add one or more from list link**.
   - Search for and select one or more items.
   - or
3. Select an item type and enter item ID exactly.
4. Click **Add**.
5. Review list of added items.
   - **Note**: Once this survey is assigned, completions and mean score can be viewed for this tab.

**Task F. Associate Item with Survey**

1. Navigate to **Learning > Items**.
2. Search for an item.
3. From the search results, click the Item ID.

4. Click More in the Related area.

5. Select the Evaluations tab.
In the **Item Evaluation: User Satisfaction** section, click the search icon (🔍) to search for and select a questionnaire survey.

Click **Apply Changes**.

**Note:** Depending on how the survey was configured, the **Days to Complete** field and the **Required for Completion** checkbox may or may not be auto-filled once the survey is added. If necessary, change these fields. If desired, enter or change the **Days to Complete** number and check/uncheck the **Required for Item Completion** checkbox.
Job Aid: Create Documents

<table>
<thead>
<tr>
<th>Description</th>
<th>The purpose of this job aid is to guide administrators through the step-by-step process of creating content objects.</th>
</tr>
</thead>
</table>
| Tasks       | A. Create Documents  
B. Associate Documents to Items |

### Task A. Create Documents

1. **Navigate to Content > Documents.**
2. **Click the Add New link.**
3. **Enter a Document ID.**
4. **Enter a title for the document.**
5. **Click to select the Active checkboxes.**
6. **Select appropriate Document Type.**
7. **Select a domain.**
8. **Enter the location of the file.**
9. **Click Add.**
Task B. Associate Item with Documents

1. Navigate to Learning > Items.
2. Search for an item.
3. From the search results, click the Item ID.

4. Click More in the Related area.

5. Select the Documents tab.

6. In the Add Document to the Item section, click the add one or more from list link to search for and select a document.

7. Click Apply Changes.
SPRK 4003 - Spark LMS: Administration Tools
(Configuring Scheduled Offerings & Registration Management)

In this session, participants will review the step-by-step process of managing resources, creating scheduled offerings, adding segments, and editing scheduled offering notifications in the Spark Learning Portal. All SJCD employees must complete this session prior to receiving access to the Learning Administration Tools, which are available in the Spark Learning Portal.

Learning Objectives:

- Managing Resources (Instructors/Materials/Facilities/Locations)
- Creating Scheduled Offerings
- Add Additional Segments
- Copy Scheduled Offerings
- Edit Scheduled Offering Notifications
- Recording Learning History
- Adding and Modifying User Registrations
### Job Aid: Creating Scheduled Offerings

<table>
<thead>
<tr>
<th>Description</th>
<th>Topic: Scheduling Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>The purpose of this job aid is to guide administrators through the step-by-step process of creating and editing a scheduled offering. Related terminology is provided.</td>
<td>Add New Scheduled Offering</td>
</tr>
<tr>
<td></td>
<td>Assigning Resources to Segments</td>
</tr>
<tr>
<td></td>
<td>Adding Segments to a Scheduled Offering</td>
</tr>
<tr>
<td></td>
<td>Copy a Scheduled Offering</td>
</tr>
</tbody>
</table>

#### Tasks

- A. Create Scheduled Offering
- B. Add Additional Segments
- C. Add Additional Resources
- D. Copy Scheduled Offering
- E. Edit Scheduled Offering Notifications

### Terminology:

**Scheduled Offering:** A scheduled offering is an item or activity scheduled for delivery on a specific date and time.

**Segment:** Unit of division of an item offering based on duration that facilitates variable resource scheduling.
Task A. Create Scheduled Offering

1. Navigate to Learning > Scheduled Offerings.
2. Click the Add New link.
   The Scheduled Offering wizard displays.
   or
1. Enter Add Scheduled Offering in the Search box.
   Click Go.
   The Scheduling Offering wizard displays.

3. Select the Item type option.
4. Use the search icon (🔍) to search for and select an item.
5. Enter a description of the scheduled offering.
6. Specify or select the appropriate Domain.
7. Select whether to publish the scheduled offering in all associated catalogs.
8. Select a start date, start time, and time zone.
   The scheduled start date and time and the scheduled end date and time display below the schedule information.
9. 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.
   If there are any warnings, the Warning Details screen displays. Click Yes to continue.

The scheduled offering record displays allowing you to make further configurations.
Task B. Add Additional Segments

1. Click the scheduled offering Segments tab from the Related area.
   *Note: If necessary, click List View.*

2. Click the Copy Segments icon ( ).

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

4. Click Copy.

---

### Copy Daily Segments

The schedule times listed below will be copied and appended to the end of this scheduled offering.

**Scheduled Offering:** Customer Service Excellence (1782)

<table>
<thead>
<tr>
<th>Segment</th>
<th>Schedule Time</th>
<th>Location</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out Session</td>
<td>Sep 26/2012 01:01</td>
<td>New York Lecture Hall</td>
<td>Andre Young</td>
</tr>
</tbody>
</table>

*Number of Times to Copy: 3*
### Task C. Add Additional Resources

1. Search for and access in edit mode a scheduled offering record.
2. Select the **Segments** tab from the Related area.
3. Click the segment link for the segment you wish to add resources.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For the selected segment, select a primary instructor.

4. Click **Add Resources**.
5. Select **Add Instructor**.

![Edit Segment](image-url)
Click the corresponding checkbox to select the instructor to add for the segment.

Click Add.

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

Click Apply to All Segments at the segment level to copy the new resources to all segments of the scheduled offering.

Click Save and Close.
### Task D. Copy Scheduled Offering

1. Search for and access in edit mode a scheduled offering record.
2. Click Copy in the Actions area.

| 3 | Set copy preferences by checking associated boxes.  
|   | *Note: Click Help for additional information on each option.*

| 4 | Select a copy frequency.  
| 5 | Select the first scheduled offering copy start date.  
| 6 | Set the frequency to copy the scheduled offering.  
| 7 | Click Next.  

**Note:** If you choose an option other than Copy Single, enter a scheduling frequency as seen above. This determines how many new offerings are created and how frequently they are scheduled.
Confirm copy results. Click Copy.

Once the copies are created, you can access them with the links on the final screen. Click OK.
### Task E. Edit Scheduled Offering Notifications

1. Search for and access in edit mode a scheduled offering record.
2. Click **More** from the Related area.
3. Select the **Notifications** tab of the scheduled offering.
4. Scroll down to view the notification you wish to edit.  
   **Note:** You may edit the notifications sent by the following triggers:  
   - Offering Cancellation  
   - User Registration  
   - User Withdraw  
   - User Waitlist  
   - User Waitlist Removal  
   - User Pending Status
5. Click **Preview** to view the notification.
6. In the notification body, you will see syntax tags. These indicate a database value that is included in the emails.

7. To modify the body of the notification, locate the body section and add text.
   You may remove existing labels and tags, or add text around them.
   Click Apply Changes.

8. To attach a document to the notification, click Browse to search for and select the document.
   Click Apply Changes.

9. This note confirms your registration in the following learning activity:
   ![image]

10. **Note**: Click Help for more information on syntax tags and how to use them in notifications.
Job Aid: Record Learning - Multiple

Topic: Learning Needs Management - Record a Learning Event for Item(s)

Topic: Scheduling Management - Record a Learning Event for a Scheduled Offering

Description
The purpose of this job aid is to guide administrators through the step-by-step process of using the Learning Event Recorder. Related terminology is provided.

Tasks
A. Use Learning Event Recorder to Record Completion of Item - Multiple
B. Use Learning Event Recorder to Record Attendance at External Event
C. Use Learning Event Recorder to Record Completion of Scheduled Offering
D. View User Learning History tab
E. Edit Learning Event Using Learning Event Editor

Terminology:

Learning Event: A learning event is the record of:

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

Types of Learning

- **Item Based Events:** Items are the primary events found in the list of learning events for users. Learning events for items include those created as scheduled offerings and those with online content where the system records the learning event when the user completes the content. All items may have a learning event recorded against them for any user, even if the item was not a part of his/her Learning Plan.

- **External Events:** A learning activity outside of the organization, such as a college course or a seminar, for which there is no item record in SuccessFactors Learning, may be recorded in a user’s Completed Work.

- **Scheduled Offering:** An item or learning event with a scheduled date and time.
Task A. Use Learning Event Recorder to Record Completion of Item - Multiple

1. Log in to SuccessFactors Learning as an admin.
2. Navigate to Users > Tools > Record Learning - Multiple.
3. Enter Record Learning in the Search box.
The Record Learning - Financial wizard displays.
4. Select the Item option.
5. In the Search & Add Items section, select the item type from the drop-down menu.
6. Enter the Item ID in the textbox exactly.
7. Click Add.
8. Click the select icon ( ▼ ) to search for and select an item.

Note: This option is usually used when an item has not been scheduled or is classified as “Other.”
Note: By selecting to search for an item, all relevant information will be auto-populated into the fields.
7. In the **Search & Add Users** section, enter a user ID exactly.

8. Click **Add**.

9. Click the **select icon** (🔍) to search for and select one or more users.

10. Click **Next**.

---

Review and update the selections made on the previous page.

11. In the **Edit Details** section, enter details for the item for each user:
   - Completion date and time
   - Time zone
   - Grade and completion status
   - Total hours, credit hours, contact hours, and CPE

12. Click the **More Options icon** (🔍) to enter instructor information and comments.

13. Click **Apply Changes** to make the changes apply to all users.

14. Click **Next**.

**Note:** Click the **expand icon** (🔍) for an item to change details for specific user records.
If competencies need to be assessed as a result of recording the learning event, select the Assess based on item setting checkbox.

Review learning event information.

Click Submit.

The application provides a status to let you know that the learning event has been recorded successfully.

Click Start Over... to begin the Learning Event Recorder process again. This retains all users previously selected.

Task B. Use Learning Event Recorder to Record Attendance at External Event

Navigate to Users > Tools > Record Learning - Multiple.

or

Enter Record Learning in the Search box.

The Record Learning - Financial wizard displays.
2. Select the **External Event** option.

3. In the **Add External Events** section enter a description of the external event.

4. Click **Add**.

---

<table>
<thead>
<tr>
<th>What kind of learning you want to record?</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Item</td>
</tr>
</tbody>
</table>

**Add External Events**

- **External Event:** [ ]

**List of External Events**

There are no external events. Please add external events before proceeding.

**Note:** This option is usually used to record completion or attendance for an event that is not represented as an item in SuccessFactors Learning.

---

5. In the **Search & Add Users** section, enter a user ID exactly.

6. Click **Add**.

or

7. Click the **select icon** ( ) to search for and select one or more users.

8. Click **Next**.

---

**Record Learning - Multiple**

This wizard is used to record learning history for multiple users for one or more items, scheduled offerings or external events. Simply indicate the type of learning to record, select the related items, scheduled offerings or external events to be recorded for each, and specify the users for whom you want to record the learning history.

<table>
<thead>
<tr>
<th>What kind of learning you want to record?</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Item</td>
</tr>
</tbody>
</table>

**Add External Events**

- **External Event:** [ ]

**List of External Events**

There are no external events. Please add external events before proceeding.

**List of Selected Users**

<table>
<thead>
<tr>
<th>User ID</th>
<th>Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>
Review and update the selections made on the previous page.

9 In the Edit Details section, enter details for the item for each user:
   - Completion date and time
   - Time zone
   - Grade and completion status
   - Total hours, credit hours, contact hours, and CPE

10 Click More Options (rimon) to enter instructor information and comments.

11 Click Apply Changes to make the changes apply to all users.

12 Click Next.

Review learning event information.

13 Click Submit.
The application provides a status that the learning event has been recorded successfully.

Click **Start Over**... to begin the Record Learning - Financial process again. This retains all users previously selected.

---

**Task C. Use Learning Event Recorder to Record Completion of Scheduled Offering**

1. Navigate to Users > Tools > Record Learning - Multiple.
2. or
3. Enter **Record Learning** in the Search box.
4. The Record Learning - Financial wizard displays.
5. Select the **Scheduled Offering** option.
6. In the **Search & Add Offerings** section enter the Schedule Offering ID in the textbox exactly.
7. Click **Add**.
8. or
9. Click the **select icon** (🔍) to search for and select a scheduled offering.
<table>
<thead>
<tr>
<th>Step</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>In the <strong>Search &amp; Add Users</strong> section, enter a user ID exactly.</td>
</tr>
<tr>
<td>7</td>
<td>Click <strong>Add</strong>.</td>
</tr>
<tr>
<td>8</td>
<td>Click the <strong>select icon (🔍)</strong> to search for and select one or more users.</td>
</tr>
<tr>
<td>9</td>
<td>Click <strong>Auto Fill From Registration</strong>.</td>
</tr>
<tr>
<td>10</td>
<td>Click <strong>Next</strong>.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If you search for a scheduled offering, the search screen defaults to search for all offerings prior to today's date.</td>
</tr>
<tr>
<td>11</td>
<td>Review and update the selections made on the previous page.</td>
</tr>
<tr>
<td></td>
<td>In the <strong>Edit Details</strong> section, enter details for the item for each user:</td>
</tr>
<tr>
<td></td>
<td>- Grade and completion status</td>
</tr>
<tr>
<td></td>
<td>- Total hours, credit hours, contact hours, and CPE</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Click the <strong>expand icon (펼)</strong> for an item to change details for specific user records.</td>
</tr>
<tr>
<td>12</td>
<td>Click the <strong>More Options icon (⋯)</strong> to enter instructor information and comments.</td>
</tr>
<tr>
<td>13</td>
<td>Click <strong>Apply Changes</strong> to make the changes apply to all users.</td>
</tr>
<tr>
<td>14</td>
<td>Click <strong>Next</strong>.</td>
</tr>
</tbody>
</table>
If competencies need to be assessed as a result of recording the learning event, select the Assess based on item setting radio button. Review learning event information. Click Submit.

Click Start Over... to begin the Learning Event Recorder process again. This retains all users previously selected.

The Learning events were recorded successfully.

Task D. View User Learning History Tab

Navigate to Users > Users.

Enter search criteria to find one of the users for whom you just recorded a completion.

Click Search.
Click the user ID link to select the user record.

Click the Learning History tab.
View learning history.

Click the View Details link for additional information on the learning event. A separate pop-up window appears.

*Note: Any additional attached documents can be viewed here.*
### Task E. Edit Learning Event Using Learning Event Editor

1. Navigate to Users > Tools > Learning Event Editor.  
   or
2. Enter Learning Event Editor in the Search box.
3. Enter search criteria to find learning event (for example, search by user ID or between dates).
4. Click Search.

4. Click the edit icon (/button) to select the learning event record.

<table>
<thead>
<tr>
<th>User ID</th>
<th>User Name</th>
<th>COURSE EHS-101 (Rev 1 - 11/25/2008 0700 America/Denver)</th>
<th>Description</th>
<th>Completion Date</th>
<th>Completion Status</th>
</tr>
</thead>
</table>
Review the learning event details.

5 On the Summary tab, details such as the instructor, grade, completion status, completion date and time can be edited.

6 Click Apply Changes to save any edits made to the learning event record.

7 Click the File Attachments link to attach any external files to the learning event record.

Note: Attachment types and size are limited to your system’s configuration. Contact your administrator for details. Attachments are available to the user via Completed Work.

8 Click Continue.
Job Aid: Registration Assistant Tool

Topic: Scheduling Management

Description
The purpose of this job aid is to guide administrators through the step-by-step process of using the Registration Assistant tool.

Tasks
A. Use Registration Assistant to Register Users in a Scheduled Offering
B. Use Registration Assistant to Withdraw Users from a Scheduled Offering
C. Use Registration Assistant to Add Slots to a Scheduled Offering

Task A. Use Registration Assistant to Register Users in a Scheduled Offering

1. Log in to SuccessFactors Learning as an admin.
3. Select Register Users.
4. Click Next.
5. Enter the offering ID.
6. Or
7. Select the search icon (🔍) to search for and select a scheduled offering.
8. Click Next.

Registration Assistant

Step 1: Select Offering

Step 2: Select Scheduled Offering

Scheduled Offering: [1724]
### Enter user ID.
Select **Registration Status ID** from drop-down menu.
Click **Add**.
**or**
Click the add one or more from list link to search and select user(s) to add.
Click **Next**.

### Enter any comments as necessary.
Click **Next**.

### Skip to Step 14 if no financial data is necessary.
If applicable, select slot ID from the drop-down menu.
**or**
Enter an order ticket number.
**or**
Enter chargeback account.
Click **Next**.

---

**Note:** Reservation Date and Time will default to current date and time; and Time Zone will default to your administrator time zone setting.
**Step 6: Record Registration of the Registration Assistant displays.**

Review information.
Select applicable email confirmation options.
Click Finish.

A confirmation status notification displays.

**Task B. Use Registration Assistant to Withdraw Users from a Scheduled Offering**

1. Navigate to Learning > Tools > Registration Assistant.
2. Select Withdraw Users.
3. Click Next.
Enter scheduled offering ID.

or

Select the search icon ( ) to search for and select a scheduled offering.

Click Next.

Click Withdraw checkbox for users you wish to withdraw from scheduled offering.

Click Next.

Review information on user to be withdrawn.

Select applicable email confirmation options.

Click Finish.
Task C. Use Registration Assistant to Add Slots in a Scheduled Offering

1. Navigate to Learning > Tools > Registration Assistant.
2. Select Reserve Slots.
3. Click Next.

4. Enter scheduled offering ID.
   or
4. Select the search icon (🔍) to search for and select a scheduled offering.
5. Click Next.

6. Enter Organization ID for whom the slots are being reserved.
   or
6. Select the search icon (🔍) to search for and select an organization ID.
7. Enter number of slots.
8. Select Registration Status ID from drop-down menu.
9. Click Add.
10. Click Next.

Note: Reservation Date and Time will default to current date and time; and Time Zone will default to your administrator time zone setting.
Enter any comments as necessary.
Click Next.

Skip to Step 15 if no financial data is necessary.
Click the Edit link to select and enter one or more chargeback account.
Enter price.
Click Next.

Review information.
Select email confirmation option.
Click Finish.

A confirmation status notification displays.

- All slot reservations in this scheduled offering were successful.
**Job Aid: Registration Management**

**Course: Scheduling Management**
- Lab 5: Setting Registration Parameters
- Lab 6: Registering Users for a Scheduled Offering
- Lab 7: Reserving Slots for a Scheduled Offering

**Prerequisites**
- Introduction to SuccessFactors Learning Administration
- Learning Needs Management
- Scheduling Management

**Description**
The purpose of this job aid is to guide administrators through the step-by-step process of configuring registration parameters, and registering users.

**Tasks**
- A. Set Self-Registration Parameters
- B. Set Registration Approval Process
- C. Register Users in an Offering
- D. Register Users in an Offering - from request list
- E. Add Slots to an Offering
- F. Reserve Slots in an Offering
- G. Change Registration Status of User

---

**Task A. Set Self Registration Parameters**

1. Log in to SuccessFactors Learning as an admin.
2. Navigate to Learning > Scheduled Offerings.
3. Enter criteria to search for a scheduled offering.
4. 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.

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

6 Set the Enable Users to Waitlist option to Yes.

7 Enter a registration cut-off date.

8 Enter a registration cut-off time.

9 Enter the minimum registrations.

10 Enter the maximum registrations.

11 Set the Self Registration option to Yes.

12 Click Save.
Task B.  Set Registration Approval Process

1. Access the scheduled offering record in edit mode.
2. Select the approval process from the drop-down menu.
3. Set the Approval Required option to Yes.
4. Click Save.

Note: Steps and users associated with approval processes are configured in the System Admin menu.

Task C.  Register Users in an Offering

1. Search for and select the scheduled offering.
2. Select the Registration tab from the Related area.
3. Click the Add To Registration Menu button to search for and select users to register.
4. Select Add Users from the drop-down menu.
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Enter criteria to search for users to register for the offering. Click <strong>Search</strong>.</td>
</tr>
<tr>
<td>6</td>
<td>From the search results list, select the user registration status from the drop-down menu. Check the <strong>Add</strong> checkbox. Select notification preferences. Click <strong>Add</strong>.</td>
</tr>
</tbody>
</table>
Task D. Register Users in an Offering - from request list

1. Search for and select the scheduled offering.
2. Select the Registration tab from the Related area.
3. Click the Add To Registration Menu button (:Add).
4. Select Add Users From Request List from the drop-down menu.

5. Select the user Registration Status.
6. Check the Add checkbox.
7. Check notification preferences.
8. Click Add.

The users who requested this schedule is now enrolled accordingly.
Task E. **Add Slots to an Offering**

1. Search for and select the scheduled offering.
2. Select the **Registration** tab from the Related area.
3. Click the **Add To Registration Menu** button (🗘)
4. Select **Add Slots** from the drop-down menu.

5. Click the **search icon** to search for and select the organization reserving slots.
6. Enter a number of slot reservations.
7. Select the reservation date.
8. Click **Save**.

---

Slots have been reserved for this organization.
### Task F. Reserve Slots in an Offering

1. Search for and select the scheduled offering.
2. Select the Registration tab from the Related area.
3. Click the Add To Registration Menu button (🔍) to search for and select users to register.
4. Select Add Users from the drop-down menu.
5. Select the user Registration Status.
6. Select slot ID to use.
7. Check the Add checkbox.
8. Select notification preferences.
9. Click Add.

#### Add Users to Scheduled Offering

<table>
<thead>
<tr>
<th>User</th>
<th>Registration Status</th>
<th>Slot ID</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMYABED</td>
<td>ENROLL(Enrolled)</td>
<td>41</td>
<td>✓</td>
</tr>
<tr>
<td>Abed, Amy M</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RAYABED</td>
<td>ENROLL(Enrolled)</td>
<td>41</td>
<td>✓</td>
</tr>
<tr>
<td>Abed, Raya M</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RENABED</td>
<td>WAITLIST(Waitlisted)</td>
<td>41</td>
<td>✓</td>
</tr>
<tr>
<td>Abed, Neha N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROGERABED</td>
<td>ENROLL(Enrolled)</td>
<td>41</td>
<td>✓</td>
</tr>
<tr>
<td>Abed, Robert E</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LAURABEL</td>
<td>ENROLL(Enrolled)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jacek A.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Email confirmations:

- User
- Instructor
- Supervisor
- Contacts
## Task G. Change Registration Status of User

1. Search for and select the scheduled offering.
2. Select the **Registration** tab from the Related area.
3. Hover your mouse over the user for whom to change the registration status.
4. Select **Modify**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Change the user Registration Status. Change any other registration data, add comments, or select notification options.</td>
</tr>
<tr>
<td>6</td>
<td>Click Save. <strong>Note</strong>: Admins who withdraw a user from an offering will see a warning if this item is a prerequisite for another enrollment. The admin has the option to withdraw or cancel the user from the dependent offering.</td>
</tr>
</tbody>
</table>

The user’s registration status has been changed.

- **Modify**
  - **Name**: Amy M Abed
  - **User ID**: AMYMABED
  - **Status**: Active Enrollment
  - **Registration Date**: 4/27/2012
  - **Time (HHmm)**: 1610

- **Save** and **Cancel**

The status of the user Reitha N Abed has been changed to Active Enrollment.
SPRK 4004 - Spark LMS: Administration Tools (Reporting Basics)

In this session, participants will review the step-by-step process of creating, running, scheduling, and saving reports in the Spark Learning Portal. All SJCD employees must complete this session prior to receiving access to the Learning Administration Tools, which are available in the Spark Learning Portal.

Learning Objectives:

- Access and Search for Reports
- Run a Report
- Scheduled/Save a Report
- Import/Export Reports
- Edit Report Details
- Publish a Report
- Publish a Report

Most Frequented Reports:

- Item Status
- Learning History
- Learning Needs
- Curriculum Item Status
- Scheduled Offering Roster
- Follow-Up Evaluation
- Follow-Up Evaluation by Individual Response
## Job Aid: Searching

### Course: Introduction to SuccessFactors Learning Administration

#### Prerequisite
- Introduction to SuccessFactors Learning Administration

#### Description
The purpose of this job aid is to guide administrators through the step-by-step process of performing simple and advanced searches for multiple record types within SuccessFactors Learning.

#### Tasks
- **A.** Search Basics
- **B.** Create/Delete Search Filter
- **C.** Add/Remove Criterion from Search Filter
- **D.** Select from a List
- **E.** Save Your Individual Search
- **F.** Adjust Display of Search Results
- **G.** Sort Search Results
- **H.** Downloading Search Results

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### Task A.  Search Basics

On each search page, you will most likely see the following terms in the drop-down menu associated with most entities.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Exact</strong>:</td>
<td>If you know the precise ID of the record, select <strong>Exact</strong> from the drop-down menu and click <strong>Search</strong>.</td>
</tr>
<tr>
<td><strong>Any</strong>:</td>
<td>Using the precise ID or description of the record, enter one or more criterion separated by a comma and click <strong>Search</strong>. For example, if searching for all user records containing the first name John or Jane, enter the exact first names separated by a comma, select <strong>Any</strong> from the drop-down menu and click <strong>Search</strong>.</td>
</tr>
<tr>
<td><strong>Starts With</strong>:</td>
<td>If you know the first part of an ID or description, select <strong>Starts With</strong> from the drop-down menu and type the first few letters or numbers of the record. The matching records display.</td>
</tr>
</tbody>
</table>

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**Contains:** If you know any part of the record, select **Contains** from the drop-down menu to display the matching records.

**Does Not Contain:** If you know that any part of the record does not contain a certain string, select **Does Not Contain** from the drop-down menu.

**Is Empty:** Some entities will contain the term **Is Empty** in the drop-down menu. This selection returns all records where the specified field is empty. For example, if searching for all users without an employee type, select **Is Empty** from the drop-down menu for the employee types criteria and click **Search**.

![Employee Types: Is Empty](image)

You can also choose whether or not you want your search to be case sensitive by using the **Case Sensitive Search** option. The **Yes** button is selected by default which means that the system search is case sensitive. A non-case-sensitive search may take a little longer.

![Case sensitive search:](image)

**Search All Locales** radio buttons have been added to all search pages where data has been localized. When enabled, the search will include all locales in the keyword search, when disabled, only the admin’s active locale will be searched.

![Search All Locales:](image)

**Commonly Used Search Icons**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Calendar" /></td>
<td>The <strong>Calendar</strong> picker is associated with the date field. Use it to select and populate the corresponding date field.</td>
</tr>
<tr>
<td><img src="image" alt="Create Filter" /></td>
<td>Click the <strong>Create Filter</strong> button to find and select a corresponding entity to include in your search filter.</td>
</tr>
<tr>
<td><img src="image" alt="Clear Filter" /></td>
<td>Click the <strong>Clear Filter</strong> button to clear the content of your corresponding search filter.</td>
</tr>
<tr>
<td><img src="image" alt="Search" /></td>
<td>Click the <strong>Search</strong> button to select from a list or find and select the corresponding entity using a filter.</td>
</tr>
</tbody>
</table>
Task B. Create/Delete Search Filters

The search filter determines the contents of your result by listing only entities that satisfy all the criteria specified by your filter. For example, you may want to list only users that have a particular job code assigned. You need to specify the job code in a filter and apply that filter to search criteria to see only those users that relate to the selected job code.

1. Navigate to Users > Users.
2. To create the filter, click the Create Filter icon (▼) for job codes.

3. If you don’t know the job code ID exactly, search for it by entering criteria. In this example, let’s search for job codes that contain the word Safety in the description.
4. Click Search.

Note: The yellow box at the top right indicates how many job codes have been added to this filter. Currently there are zero.
Select one or more job code checkboxes.
Click Add to Filter.

The yellow filter box on the top right now shows two job codes added to the filter.
Click the arrow (.expand/contract the list of job codes added to the filter.
Click Search Again to add additional job codes to the filter.
or
Click Submit Filter.
If you submit the filter, you are returned to your original search screen. You now see that the job code attribute has two (2) criteria selected for this filter.

You can modify this filter by clicking the Filter by Criteria icon (○), or you can clear the filter by clicking the Clear Filter icon (●).

Click Search to view results.

---

**Task C. Add/Remove Criterion from Search Filter**

Each entity in SuccessFactors Learning has multiple attributes and you may find that some of the attributes are more useful than others in conducting searches. SuccessFactors Learning gives you the choice to determine the attributes of the entity that you would like to use as criteria for your search.

Let’s now search for all users within a specific organization.

1. Navigate to Users > Users.
2. Click the Add/Remove Criteria icon (○).

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3. Select the criteria check boxes to add to the search screen.

4. Click Select.

The new criteria appear on the search screen.
Task D.  Select from a List

SuccessFactors Learning has a number of reference lists that you can select from without creating and submitting a filter. Review the list, and check the objects you want to use in your search filter.

Let’s continue to use our example of searching for users. We now want to search for users within the EHS organization who have an employee status of part-time.

1. In the Organizations textbox, type EHS.
2. Next to the Employee Statuses field, click the Filter icon (▶).

   **Note:** If either of the above criteria are not listed, use the Add/Remove Criteria button.

You see a list from which you can select one or more objects to populate the related field.

   **Note:** The yellow box at the top right indicates how many job codes have been added to this filter. Currently there are zero.

3. Select the checkbox(es) for the record(s) to be selected.
4. Click Add to Filter.
The yellow filter box on the top right now shows the added criteria to the filter.

5. Click the arrow (△) to expand/contract the list of criteria added to the filter.

6. Click Search Again to add additional job codes to the filter.

7. Click Submit Filter.

8. Now that a criterion is selected, click Search to view results.

Note: To clear the list of selected entities, click the Clear List icon (▽).
Task E.  Save Your Individual Search

You can save a search filter and reuse the criteria specified in the search later. The search filter is individual-based and available only to your login.

1. Click **Save As** once the search criteria have been defined.

   ![Search Criteria](image)

   - **Case sensitive search:**
     - **User ID:** Starts With
     - **Last Name:** Starts With
     - **First Name:** Starts With
     - **Middle Initial:** Starts With
     - **Role ID:** Starts With
     - **User Status:** Active, Not Active, Both
     - **Domains:**
       - **Organizations:** Starts With
         - **Employee Status:**
           - **Job Codes:** Starts With
           - **Supervisors:** Starts With

2. The system prompts you for an ID for your saved search and a brief description of the search.

3. Enter an ID in the Saved Search ID textbox.

4. Enter an intuitive description in the Description textbox.

5. Click **Submit**.
Next time you want to use this exact search, click the **Saved Searches** icon (✔) on the search page and select the search name you wish to conduct.  
**Note:** If you select a saved search, the search ID and description appear at the top of the page.

---

**Task F. Adjust the Display of Search Results**

Your search result is the set of related entities that fit the search criteria you specified. You may, however, choose to review the results by specific fields not based on all of the attributes of the search result.

1. Click the **Field Chooser** icon (✔) above the search results list to determine which attributes of the listed entities that you want and in which column.
Select the attribute that you want to display. In this example, let’s show the job location in the third column and the organization ID field in the fourth column.

Click Submit.

*Note: The column number is sequential (i.e., 1, 2, 3, 4).*

View the new fields added to the search results.

**Task G. Sort Search Results**

Once you have the results you are looking for, you can sort it based on key columns on your list (except the Description column/field).

To sort the list by an entity, simply find the column and click the header: an up arrow head indicates ascending order, A>Z; and a down arrow head indicates descending order, Z>A.
Task H. Downloading Search Results

Once you have the results you are looking for, you can export the data returned in your search query to a CSV file. The file will contain fields that are not currently displayed on the screen with the Field Chooser.

1. To download the search results, click **Download Search Results**.
   
   Depending on the amount of results in your search, it may take a few seconds to generate the CSV file.

2. When prompted, select **Open** or **Save**.

   ![Download Search Results](image1)

   ![Field Chooser](image2)

   ![File Download](image3)
Job Aid: Running Reports: Basic Tasks

Description
The purpose of this job aid is to guide administrators through the step-by-step process of using the basic tasks to work with reports in SuccessFactors Learning.

Tasks
A. Access and Search for Reports
B. Run a Report
C. Schedule a Report
D. Save a Report

Task A. Access and Search for Reports

Log in to SuccessFactors Learning as an admin.

Navigate to Reports.

1. Log in to SuccessFactors Learning as an admin.
2. Navigate to Reports.
Use the Search and Browse By features to filter the reports list.

Click Submit.

Click Sort By to sort the reports list by Title or by Category.

Click:

5. 📝: Edit icon to edit the report details, i.e., description, comments, domain.

6. 📦: Export icon to export the report as a zip file.

7. 📜: Expand icon to expand the list of available reports in the report group.

8. Click more to see additional report description.
## Task B. Run a Report

1. Navigate to Reports.
2. Use the Search and Browse By features to filter the reports list. Locate the report you want to run. In this case, let’s run the Scheduled Offering Roster Report.
3. Click the report title link.

4. Modify the report title if necessary.
5. Enter a report header and footer to add to the report.
6. Select a report destination from the drop-down menu.
7. Select a report format from the drop-down menu.
8. Click the filter icon to search for and select the scheduled offering to run this report.
9. Click to mask or unmask user IDs and Instructor IDs on the report.
10. Click:
    - Run Report to run the report immediately.
    - Schedule Job to schedule the report to run as a background job, once at a future date, or on a recurring basis.

### Scheduled Offering Roster

#### Run Scheduled Offering Roster

- **Report Title:** 
- **Report Header:**
- **Report Footer:**
- **Report Destination:** [Browser](#)
- **Report Format:** [HTML](#)
- **Scheduled Offering:** 
- **Mask User IDs:**

![Scheduled Offering Roster](image)

**Note:** Only published reports display the Schedule Job button.
Task C. Schedule a Report

1. Navigate to Reports.
2. Use the Search and Browse By features to filter the reports list.
   Locate the report you want to run. In this case, let’s run the Scheduled Offering Roster Report.
3. Click the report title link.

4. Modify the report title if necessary.
5. Enter a report header and footer to add to the report.
6. Select a report destination from the drop-down menu.
7. Select a report format from the drop-down menu.
8. Click the filter icon to search for and select the scheduled offering to run this report.
9. Click to mask or unmask user IDs and Instructor IDs on the report.
10. Click Schedule Job to schedule the report to run as a background job, once at a future date, or on a recurring basis.
Click the Schedule this job to be executed on radio button to schedule the report to run on a specific date and time.

*Note: Click View Available Time Slots to see a list of times you are allowed to run the report.*

Click the Schedule this job to recur as follows radio button to schedule the report to run at the specified recurring basis.

Click Finish.
### Task D. Save a Report

1. **Navigate to Reports.**
2. **Use the Search and Browse By features to filter the reports list.**
   - Locate the report you want to save. In this case, let’s save **Scheduled Offering Data Report**.
3. **Click the report title link.**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Modify the report title if necessary.</td>
</tr>
<tr>
<td>5</td>
<td>Enter a report header and footer to add to the report.</td>
</tr>
<tr>
<td>6</td>
<td>Select a report destination from the drop-down menu.</td>
</tr>
<tr>
<td>7</td>
<td>Select a report format from the drop-down menu.</td>
</tr>
<tr>
<td>8</td>
<td>Click the filter icon to search for and select the scheduled offering to run this report.</td>
</tr>
<tr>
<td>9</td>
<td>Click to mask or unmask user IDs and Instructor IDs on the report.</td>
</tr>
<tr>
<td>10</td>
<td>Click <strong>Save Report</strong>.</td>
</tr>
</tbody>
</table>
Enter an ID for the saved report.

Enter a description of the saved report.

Click Submit.

The saved report displays on the Saved Reports tab.

To run a saved report, click the Run icon ( ) in the Actions column.
Job Aid: Running Reports: Advanced Tasks

Description
The purpose of this job aid is to guide administrators through the step-by-step process of using the advanced tasks to work with reports in SuccessFactors Learning.

Tasks
A. Import Reports
B. Export Reports
C. Edit Report Details
D. Publish a Report
E. Unpublish a Report

Note: This job aid contains a number of “Next steps.” For additional information and details on these next steps, refer to the Report Designer course and materials.

Task A. Import Reports

Note: If you are a member of a role that has the Import/Export Reports workflow, then you can import and export custom reports. If you go to Reports and you see the Import link, then you can import and export reports. Before you begin, see the Communication Checklist with Report Writers. The report writer should provide you with information included in the checklist.

1. Log in to SuccessFactors Learning as an admin.
2. Navigate to Reports.
3. Verify you are on the Reports tab.
4. Click Import.
4. Enter the full path to the zip file from the report writer in the File textbox. 
   or 
5. Click Browse to search for and locate the zip file. 
6. Click Select. 

7. Click Import.

Next steps:
1. Import any labels that the report writer changed. 
2. Run unpublished report to test. (To run unpublished reports, your role must have access to the Run Unpublished Reports workflow.) 
3. Edit the attributes of the report as necessary. 
4. Publish the report. 
5. Once published, any target user in a role that has access to the Run Report workflow can run it.

**Note:**

In the Report Import page, make the following choices in collaboration with the report writer.

- **Import Summary**: Contains the contents of the .zip file that you are importing. The Existing File Information column and Published column are important to your decision making. For example, you might be importing a custom report multiple times, to test or update the file. In this case, check the Existing File Information column to see if a copy of the file exists already and when it was last updated. Also, check the Published column to see if you are updating a report that has been published to your target users or if you are updating a report that has remained unpublished. If the report is published, you should consider how you will distribute this new version to your target users.

- **Overwrite**: If a file already exists in the system, you are prompted to overwrite it. If your report writer is updating report formats or the look and feel of a report, then most likely you will overwrite the report file. There are other cases where you are prompted to either overwrite an existing library in the system or keep your current library. To resolve these issues, communicate with the report writer. If he or she has changed the library, and the new report requires the change, then you must overwrite your current library. However, other reports might also depend on the library, so before you publish a report, collaborate with the report writer to test your reports and other reports in the system.
Task B. Export Reports

1. Navigate to Reports.
2. Use the Search and Browse By features to filter the reports list.
   Locate the report to export. In this case, let’s export the Certificate of Completion for Offerings Report.
3. Click the Export icon ().

4. Click Export.

5. Click Open with to open the file.
   or
5. Click Save File to save the file.
Task C.  Edit Report Details

1. Navigate to Reports.
2. Use the **Search** and **Browse By** features to filter the reports list.
3. Locate the report you want to edit. In this case, let’s edit the **Certificate of Completion for Offerings Report**.
4. Click the **Edit** icon (📝).

<table>
<thead>
<tr>
<th>Modify:</th>
<th>Report Details:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Report description</td>
<td>Certificate of Completion for Offerings (System)</td>
</tr>
<tr>
<td>- Comments</td>
<td>* = Required Fields</td>
</tr>
<tr>
<td>- Category</td>
<td>Description:</td>
</tr>
<tr>
<td>- Domain</td>
<td>The Certificate of Completion for Scheduled Offerings report prints the certificates of completion for users by scheduled offering.</td>
</tr>
<tr>
<td>- Published</td>
<td>Security for this report is based on:</td>
</tr>
<tr>
<td>- Report Group ID</td>
<td>User</td>
</tr>
<tr>
<td>Click Save.</td>
<td>Category: Learning</td>
</tr>
<tr>
<td></td>
<td>*Domain: PUBLIC</td>
</tr>
<tr>
<td></td>
<td>Published:</td>
</tr>
<tr>
<td></td>
<td>File under Report Group</td>
</tr>
<tr>
<td></td>
<td>ID:</td>
</tr>
<tr>
<td></td>
<td>Name:</td>
</tr>
</tbody>
</table>

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(SuccessFactors Learning b1210 Administrator Job Aid)

Running Reports: Advanced Tasks
Task D. **Publish a Report**

*Note: When you import a report for the first time, it is in the unpublished state. While it is in the unpublished state, you should test it to ensure that it works as expected. If possible, you should also ask the report writer to create a test report for you.*

1. Navigate to Reports.
2. Use the Search and Publication Status features to filter the reports list.
3. Click Submit.
4. Locate the report to publish. In this case, let’s publish the Scheduled Offering Roster report.
5. Click the Edit icon (📝).
6. Click to check the Published checkbox.
7. Click Save.
8. Once saved, click Close.
Task E.  Unpublish a Report

1. Navigate to Reports.
2. Use the Search and Publication Status features to filter the reports list.
3. Click Submit.
4. Locate the report to unpublish. In this case, let's unpublish the Scheduled Offering Data Report.
5. Click the Edit icon (epad).
6. Click to un-check the Published checkbox (i.e., clear the checkbox).
7. Click Save.
8. Click Close.

Scheduled Offering Data Report (System)

* Required Fields

Description:
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.

*Target Users: Administrators
Security for this report is based on:
Scheduled Offering
Category: Learning
*Domain: PUBLIC
Published: [ ]

File under Report Group
ID: ScheduleOfferingData
Name: Schedule Offering Data
8 Use the Publication Status feature to filter the reports list.

9 Click Submit.

The reports list shows all unpublished reports.