Organizational and Talent Development

Quick Reference Guide

General End Users – All SJCD Employees (Level One)

Fall 2013
# Table of Contents

SPRK 1001 - Spark LMS: Getting Started ................................................................. 4

Level One - Logging In to SuccessFactors ............................................................ 5

Level Two - General Navigation ............................................................................ 7

Task A. The Learning Page ....................................................................................... 7

Task B. Additional Course Information .................................................................. 8

Task C. To Search and Register for a Course ......................................................... 8

SPRK 1002 - Spark LMS: General Navigation ....................................................... 12

Job Aid: Navigation ............................................................................................... 13

Task A. Identify Areas of the User Interface ......................................................... 14

Task B. Navigation Tips ......................................................................................... 15

Sorting Data in Tables ......................................................................................... 15

Task C. Filtering Data ........................................................................................... 17

Job Aid: Self-Registering in a Scheduled Offering ................................................. 18

Task A. Register from the Learning Plan ............................................................ 18

Task B. Register from the Catalog .......................................................................... 20

Task C. Confirm Registration ................................................................................ 22

Job Aid: Self-Assign Items .................................................................................... 23

Task A. Browse Catalog ....................................................................................... 23

Task B. Recommended Item .................................................................................. 25

Task C. Locate and Self-Assign Items Using Search Catalog ............................... 26

Task D. Using Narrow Courses Search Filter Options ......................................... 27

Task E. Using the Course Calendar ....................................................................... 29

Monthly View ......................................................................................................... 31

Weekly View ......................................................................................................... 32

Daily View .............................................................................................................. 32

Job Aid: Launching and Completing Assigned Survey ......................................... 33

Task A. Launch and Complete Assigned Survey ............................................... 33

SPRK 1003 - Spark LMS: Launching Online Content ........................................... 36

Job Aid: Launching Online Content ...................................................................... 37

Task A. Identify Online Content .......................................................................... 38

Task B. Launch Online Content .......................................................................... 39

SPRK 1004 - Spark LMS: Viewing User Records .................................................. 41

Job Aid: Viewing User Records ............................................................................ 42
<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task A</td>
<td>View Learning Plan</td>
<td>43</td>
</tr>
<tr>
<td>Task B</td>
<td>View Completed Work</td>
<td>45</td>
</tr>
<tr>
<td>Task C</td>
<td>View Curriculum Status and Details</td>
<td>47</td>
</tr>
</tbody>
</table>
SPRK 1001 - Spark LMS: Getting Started

In this section, you will review the step-by-step process of logging in, retrieving a forgotten username or password, and using the Spark Learning Portal Help System. All SJCD full-time and part-time employees should complete this training section.

Learning Goals:

- Logging in to Spark Learning Portal via SuccessFactors
- Retrieve Forgotten Username/Password
- Using the Spark Learning Portal Help System
How to Navigate the Spark Learning Portal - General Users

Level One - Logging In to SuccessFactors


   Username: firstname.lastname
   Password: G# (initially if you haven’t logged in before)
   (Can click on “Forgot Your Password? for password help)

2. Once logged in, click on Home, then click on Learning to navigate to the Spark Learning Portal
The first page viewed in the Spark Learning Portal is the News Page.

3. You can click on "Do not show this page every time I sign in" or just click Continue.
Level Two - General Navigation

The Learning Page

On the Learning page, you can locate the following:

1. Top Menu – My Learning; My Employees (if a leader has direct reports in the system)
2. Learning Plan
3. Catalog
4. Easy Links
5. Learning Status

As you can see in the screenshot above, a course was added to this learning plan.
Additional Course Information
Hover over an entry to reveal a pop-up that shows additional information and available actions.

To Search and Register for a Course
1. To search for a course, click on Browse or type in your search in the Search Catalog section then click on Go.
2. Once you have found the course you would like to register for, click on **Add to Learning Plan**

3. Hover over class title to view actions, click on **Register Now**
4. On the Registration page, click on **Register Now**

5. Review the course information and click **Confirm**.
6. Your registration status will change to **Enrolled**. The system also sends you a confirmation email of your registration.

![Registration screenshot]

7. From your email, you can directly add an appointment to your Outlook calendar by clicking on the .ics attachment.

![Email attachment screenshot]
SPRK 1002 - Spark LMS: General Navigation

In this section, you will review the step-by-step process of navigating and identifying areas of the Spark Learning Portal user interface, and identifying some commonly used navigation icons. All SJCD full-time and part-time employees should complete this training section.

Learning Goals:

- Navigation Tips – Commonly Used Icons
- How To Access the Learning Catalog
# Job Aid: Navigation

## Purpose

The purpose of this job aid is to guide users through the step-by-step process of navigating and identifying areas of the SuccessFactors Learning Management System (LMS) user interface, and identifying some commonly used navigation icons.

<table>
<thead>
<tr>
<th>Task A</th>
<th>Identify Areas of the User Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task B</td>
<td>Navigation Tips</td>
</tr>
</tbody>
</table>
Task A. Identify Areas of the User Interface

1. From the Home page, select Learning from the Home menu.

Home Menu: Use the Home menu options in the top menu to navigate within SuccessFactors Learning to find the Learning page.

Note: Some of these main menu headings may not display depending on your licenses or user role.

2. User Info: Click the user name to navigate to the user’s options and settings.
Alerts: Indicates that the user must take action on something.

Learning Plan: The Learning page contains a Learning Plan as a consolidated view of tasks requiring action. All tasks are in one place. Use the filter option to limit the list, for example, to show learning only, a list of current registrations, or assessments that are due, etc.

Catalog: Enter keywords in the textbox to perform a quick search for related items in your catalog.

Easy Links: The Learning page contains a panel with Easy Links which support easy navigation. Users can access a link to locate and perform their activities. Users can configure some links to be hidden by using the wrench icon in the corner of the Easy Links panel. The user must show at least one link.

Status Pods: The Learning page contains a Status Pods panel which is a way for users to view a snapshot of progress on learning and performance activities.

Task B. Navigation Tips

Hover over an entry to reveal a pop-up that shows additional information and available actions.

Use the top menu and the Back link to navigate throughout SuccessFactors Learning.

Sorting Data in Tables

When the LMS displays data in tables, you can sort some columns in ascending or descending order.

The Completed Work table (below) is sorted by the Completion Date (indicated by the sort order arrow). The icon indicates the column is sorted in ascending order. To change the sort order to descending, click the Completion Date column header. The arrow changes to and re-sorts the table contents.
### Completed Work

<table>
<thead>
<tr>
<th>Completion Date</th>
<th>Title</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/29/2011 08:31 PM</td>
<td>The Master Negotiator</td>
<td>Learning</td>
<td>Attended Event or Activity</td>
</tr>
<tr>
<td>6/29/2011 08:31 PM</td>
<td>Building Relationships to Get Results</td>
<td>Learning</td>
<td>Passed Course</td>
</tr>
<tr>
<td>3/14/2012 08:31 PM</td>
<td>Effective Presentation Delivery</td>
<td>Learning</td>
<td>Attended Event or Activity</td>
</tr>
<tr>
<td>4/2/2012 06:00 PM</td>
<td>Initial CPR Training</td>
<td>Learning</td>
<td>Attended Event or Activity</td>
</tr>
<tr>
<td>6/4/2012 06:01 PM</td>
<td>Getting Results without Authority Simulation</td>
<td>Learning</td>
<td>Attended Event or Activity</td>
</tr>
<tr>
<td>7/3/2012 11:24 AM</td>
<td>Communicating with Power and Confidence</td>
<td>Learning</td>
<td>Attended Event or Activity</td>
</tr>
<tr>
<td></td>
<td>[Stars and Checkmark] Clear</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/19/2012 08:30 AM</td>
<td>CPR Recertification</td>
<td>Learning</td>
<td>Attended Event or Activity</td>
</tr>
<tr>
<td>8/19/2012 08:30 AM</td>
<td>Core Fire Protection Basics</td>
<td>Learning</td>
<td>Attended Event or Activity</td>
</tr>
<tr>
<td>8/19/2012 08:30 AM</td>
<td>Fire Safety</td>
<td>Learning</td>
<td>Attended Event or Activity</td>
</tr>
</tbody>
</table>

9 Items

*All dates are for America/New_York time zone.*
Filtering Data

Filtering data prevents rows from displaying in a table or list. This is useful if the page contains a large amount of data and you are interested in only specific information. Filtering options vary depending on the page. For example, the To-Do List below can be filtered to show only All Learning, Registrations, Online Courses, etc. Also, using the “type ahead” search box, you can filter your current view.

Another example of filtering is on the Completed Work page, which can be filtered by type by selecting from the Type column drop-down list; filtered by title by using the ‘type ahead’ text entry box; filtered by status by selecting from the Status column drop-down menu; or by completion date by using the Show Completions drop-down options to show only completions after, before, or between selected dates.
Job Aid: Self-Registering in a Scheduled Offering

Purpose

The purpose of this job aid is to guide users through the step-by-step process of locating scheduled offerings and self-registering from the Learning Plan and the catalog. Each task below demonstrates a different method of registration.

Task A

Register from Learning Plan
6 Steps

Task B

Register from the Catalog
7 Steps

Task C

Confirm Registration
3 Steps

Task A. Register from the Learning Plan

1. From the Home page, select Learning from the main menu.
2. Hover over the item into which you want to register.

3. Click **Register** for registration information.

On the Registration page, review the **Dates and Times** section and find the offering you prefer.

4. Click **Register** for the corresponding scheduled offering.

5. Enter any optional comments in the **Registration Comments** field. Use this field for comments for the instructor, such as special needs.

6. Click **Confirm**.

**Note:** Click **Request Schedule** if there is no scheduled offering given at a convenient time. Enter the date and reason for the request.

**Note:** Click **View Details** to view the description, exact times, and locations for each segment of the scheduled offering.
Registration was successful.

**Registration**

- **Registration Comments**: Finished
- **Company Benefits Orientation**
- **Course**: HR-101
- **Revision**: 1 - 5/14/2013 01:00 AM America/New York
- **Start Date**: 10/24/2012 08:00 AM America/New York
- **End Date**: 10/24/2012 06:00 PM America/New York
- **Capacity**: 1 of 25 enrolled, 0 waitlisted
- **Price**: $0.00 (USD)

**Success**

- **User Name**: Alexander, Thompson
- **Registration Status**: ENROLL (Enrolled)
- **Comments**: Please enroll me in this course.

Navigate back to Learning Home, and filter the Learning Plan to show only Registrations.

**Task B. Register from the Catalog**

1. From the Learning Home page, select the Browse link under the Catalog search pod.

The browse catalog screen displays all available items in your catalog.
Narrow the catalog results by selecting the category of Instructor-Led, then select Scheduled Courses Only.

The number of available courses has been filtered down to 10 items in the catalog.

Find a course into which you want to register.

Click View Course Dates to display the available scheduled offerings.

Click Register to register into the corresponding scheduled offering. (If Register does not display, then self-registration is unavailable.)

Note: A supervisor will have the option to register others into the scheduled offering.

Enter any comments in the Registration Comments field. Use this field for comments for the instructor, such as special needs.

Click Confirm.

SuccessFactors Learning displays a registration confirmation and sends a registration email to you and your supervisor. The item is also added to your To-Do List.
Task C. Confirm Registration

1. From the Learning Home page, filter the Learning Plan to show Registrations.

2. Hover over the item you wish to check your registration.

3. Click View registration for registration information.
Job Aid: Self-Assign Items

Purpose
The purpose of this job aid is to guide users through the step-by-step process of using the catalog to locate and assign items to their To-Do List/Learning Plan. Each task demonstrates a different method of searching the catalog.

Task A
Browse Catalog
4 Steps

Task B
Recommended Item
6 Steps

Task C
Locate and Self-Assign Items Using Search Catalog – 4 Steps

Task D
Using Narrow Courses Search Filter Options – 2 Steps

Task E
Using the Course Calendar
5 Steps

Task A. Browse Catalog

1. From the Home page, select Learning from Home menu.
From the Learning page, click **Browse** above Easy Links.

The browse catalog screen displays all available items in your catalog. In this view, an item may fall under one or more subject areas.

Click the more arrow ( ▼ ) to modify the language and currency search preferences. Select your options from the respective drop-down menus.
Use the navigation and list options at the top of the list to see additional items in the catalog.

**Task B. Recommended Item**

1. From the Home page, select Learning from Home menu.

Within the search catalog pod, items can be recommended for you, if configured to do so.

2. Expand the arrow ( ) to view the recommendation.

3. If there is more than one recommended item, click the Show More link.

*Note: Click the arrow to the right of the recommendation box to scroll through all recommended items.*
Rollover the item title to display available actions.

4 Click **Add to To-Do List** to add the item to your learning plan.

5 To ignore the recommendation, click **Dismiss**.

6 Clicking the item title takes you to the item details page for further information.

---

### Task C. Locate and Self-Assign Items Using Search Catalog

1 Navigate to the **Search Catalog** textbox above Easy Links.

2 Enter *keywords* to search for in the item’s title and description.

3 Click **Go**.

4 The search displays results on two different tabs: Courses and Social Learning. Each tab indicates the number of results that match the search keyword.
Locate the item you want to add.

5 Hover your mouse over the item and click **Add to To-Do List**.

**Note:** To revise the search, enter new keywords at the top of the Search Results page, or use the Narrow Courses filter options on the left.

---

**Task D. Using Narrow Courses Search Filter Options**

1 Click **Browse** above Easy Links.
The browse catalog screen displays all available items in your catalog.

2 The Narrow Courses area of the catalog search or browse allows you to instantly filter the results. After you apply an instant filter, the system allows you to click the Clear (for the filters in that section) or the Clear All (for all filters in all sections) hyperlinks. 

Note: Scheduled offerings may belong to more than one subject area.
Task E. Using the Course Calendar

1. Click Browse above Easy Links.

2. Click Course Calendar.
The calendar displays the number of scheduled offerings for each subject area available on that day. Each subject area may display in a specific color. Click the subject area link to view the scheduled offerings.

Note: The number in parenthesis indicates how many offerings are currently available for that subject area.

Click the description link to display the segment details for the scheduled offering.

Click the Calendar Search link.

The calendar search is a filter: it shows only items in the calendar that match your search criteria. Use the calendar search if the calendar has so many offerings that you cannot scan the page for the offering you want.
Monthly View

Click **Month** to view the calendar in month mode.

Select the month and year using the drop-down boxes or arrows.

Click **Calendar Options** to set calendar display preferences.

Click a date to display the day view of the calendar.

Click the segment title to view segment details.
**Weekly View**

Click the **Week** icon to view the calendar in week mode.

- Select the week using the arrows.
- Click **Calendar Options** to set calendar display preferences.
- Click a date to display the day view of the calendar.
- Click the title to view segment details.

**Daily View**

Click **Day** to view the calendar in day view.

- Select the day using the arrows.
- Click **Calendar Options** to set calendar display preferences.
- Select to show all subject areas or specific subject areas to filter the list of offerings.
- Click the description to view summary information and segment details.
Job Aid: Launching and Completing Assigned Survey

Purpose
The purpose of this job aid is to guide users through the step-by-step process of launching and completing assigned surveys.

Task A
Launch and Complete Assigned Survey
6 Steps

Task A.  Launch and Complete Assigned Survey

1. From the Home page, select Learning from the main menu.
2. From the Home page, filter the Learning Plan by selecting Surveys from the Show drop-down menu.

Click the sorting arrow and then the course title to open.

3. Complete the survey by selecting the radio button for the appropriate rating for each survey question.

4. Click Next Page to answer additional survey questions.
5. When you have completed the survey, click Submit.

6. You are returned to your Learning Plan, which no longer shows a pending course evaluation.
SPRK 1003 - Spark LMS: Launching Online Content

In the section, you will review the step-by-step process of identifying and launching online course content. You will also learn how to withdraw from a scheduled offering. All SJCD full-time and part-time employees should complete this training section.

Learning Goals:

- Identifying Online Content
- Launching Online Content
Job Aid: Launching Online Content

Purpose
The purpose of this job aid is to guide users through the step-by-step process of identifying and launching online content.

Task A
Identify Online Content
3 Steps

Task B
Launch Online Content
6 Steps
Task A. Identify Online Content

1. From the Home page, select Learning from the Home menu.

2. From the Learning page, filter the Learning Plan to show Online Courses only.
3 The online icon ( ) in the Type column indicates the content type.

**Task B. Launch Online Content**

1 From the Learning Plan, hover over the title of the item you wish to launch and then click Go to Content.

2 Click OK.

Note: Previous revisions of online items can now be launched when assigned to a user’s Learning Plan. If a revision exists, the user is prompted to access the newer version.

The Online Content Structure page displays. An item may contain one or more content objects.

3 Click the content object title link to launch the content object. The content launches in a separate window.
<table>
<thead>
<tr>
<th>Complete the content as prescribed in the course.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note:</strong> If there is one content object within an item the content opens up immediately, skipping the content structure page. Upon closing the content window, the user is presented with a landing page that contains multiple links for the user to complete a logical workflow.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>When the content object is complete, the window closes, and returns you to the Online Content Structure page.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click <strong>Return to Content Structure</strong> to continue.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The completion date and time of the content object are captured.</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the online item contains more than one content object, all objects typically must be completed in order for the item to be complete.</td>
</tr>
<tr>
<td>Click the next content object title link to continue completion of the course.</td>
</tr>
</tbody>
</table>
SPRK 1004 - Spark LMS: Viewing User Records

In this section, you will review the step-by-step process of viewing their learning history and user records. Each task demonstration will provide information on how to view your individual Training To-Do List, Completed Work, and Curriculum Status Details. All SJCD full-time and part-time employees should complete this training section.

Learning Goals:

- How to View Your Training To-Do List (Filter, View)
- How to View Your Completed Work
- How to View Curriculum Status and Details
Job Aid: Viewing User Records

Purpose

The purpose of this job aid is to guide users through the step-by-step process of viewing their records. Each task demonstrates viewing of different records.

Task A

View Learning Plan (filter, view)
7 Steps

Task B

View Completed Work
8 Steps

Task C

View Curriculum Status and Details
11 Steps
Task A. View Learning Plan

1. Enter the web address (URL) of the user application into your browser Address field and press the Enter key.

2. Enter your company ID, user ID and password in the appropriate textbox.

3. Click Sign In.
From the Home page, select **Learning** from the Home menu.

On the Learning page, view the **Learning Plan**. This panel displays a consolidated view of tasks requiring action. This means that all tasks are in one place. The Learning Plan can be filtered and viewed in different ways.
6. Click the Show drop-down menu to select a filter option.

7. Enter text into the ‘type ahead’ search box to filter the Learning Plan.

Note: Hover over each title in the Learning Plan for additional information.

Task B. View Completed Work

1. On the Learning page, click the Completed Work status pod.
Completed Work displays a combined list of all tasks completed. It combines learning and performance activities such as courses and competency assessments. Sort the table by selecting the column header. The table to the right is sorted by the Completion Date. The sort order arrow (▲) indicates the column is sorted in ascending order. Click any column header to sort the display based on Title, Status, or Completion Date.

The Completed Work list can be filtered by type by selecting from the Type column drop-down menu.

Filter the table by title by using the ‘type ahead’ text entry box.

Filter the table by status by selecting from the Status column drop-down menu.

Filter the table by completion date by using the Show Completions drop-down options to show only completions after, before, or between selected dates.

Note: A user can also provide a rating for a completed course by selecting the number of rating stars for the course. This is only available if the course has been configured for ratings.

Note: The ’type ahead’ feature allows you to start typing in the box, and if you have one or more list items that contain the text that you typed, then the system will show only those list items. The type ahead filter is not case sensitive.
The user can click the title link and choose a desired option. In this example, click to View Details or Print Certificate.

**Task C. View Curriculum Status and Details**

1. On the Learning page, click the **Curricula** pod.

This page displays all assigned curricula, a next action and expiration date if applicable, and who assigned the curricula.

2. The curricula list can be sorted by **Curriculum Title**, **Next Action Date** or **Expiration Date** by clicking the column header.

3. The status of each curriculum can be identified by the folder icon. If a green checkmark displays, the curriculum is complete.

4. Click the curriculum title links to view curriculum details.

---

**Curriculum Status**

This page includes a list of curricula that have been assigned to you. Each curriculum title links to the Curriculum Details page which includes a list of the curriculum's items and Action drop-down menus where you can register for or request items. On this page you can also view the sub-curricula associated with each curriculum and access information on items as well.

<table>
<thead>
<tr>
<th>Curriculum Title</th>
<th>Next Action Date</th>
<th>Expiration Date</th>
<th>Assigned By</th>
<th>Remake</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPR</td>
<td>7/6/2012</td>
<td>N/A</td>
<td>Admin (Thompson Alan)</td>
<td></td>
</tr>
<tr>
<td>First Aid and CPR</td>
<td>7/6/2012</td>
<td>N/A</td>
<td>Admin (Thompson Alan)</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The **Next Action Date** is the next due date in the curriculum. The due date that displays belongs to the item that has the nearest due date. If there is an issue with the next action date, the Alert icon (⚠) displays.
From the Curriculum Details page, you can view each item requirement plus subcurricula, curriculum requirements, and/or subcurricula requirements.

To view item requirements, click the expand icon (.expand) for additional details about each item within the curriculum.

Select the View By drop-down menu to change the view of the item list, sort by the suggested order or by due date.

The Curriculum Details page also indicates whether the curriculum is complete or incomplete and if it requires retraining ( incomplete).

The item type is indicated by the item type icons (blended learning, instructor-led, or online).

The Due by column indicates when the item is due.

The date completed column displays the completion date for each item.

The Action column displays different buttons depending on the item type.