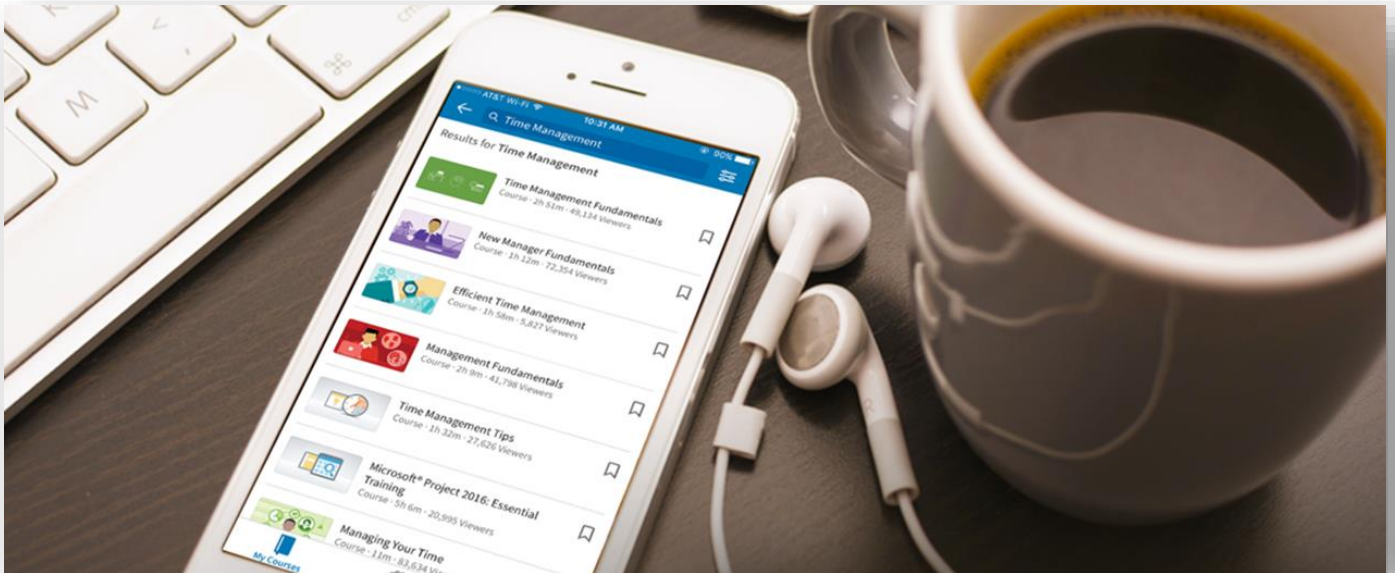


SuccessFactors Learning Adding External History to SuccessFactors



Indiana State
Personnel Department

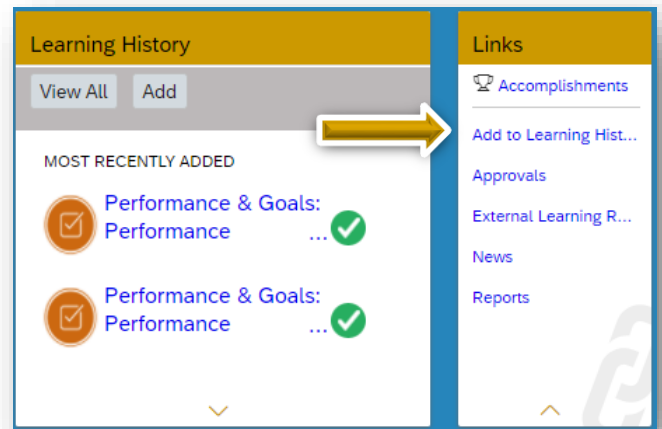




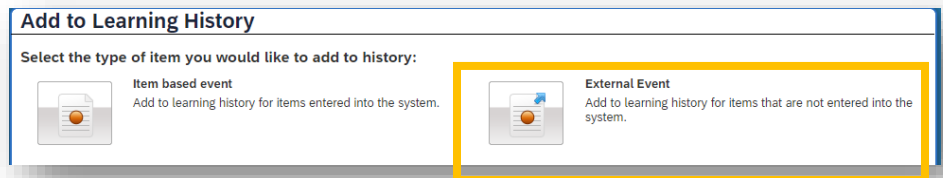
This material was developed for the SuccessFactors Learning Management System. Please contact SPDTraining@SPD.in.gov with any questions or comments.

You can also visit the [INSPD Training website](#) for additional resources.

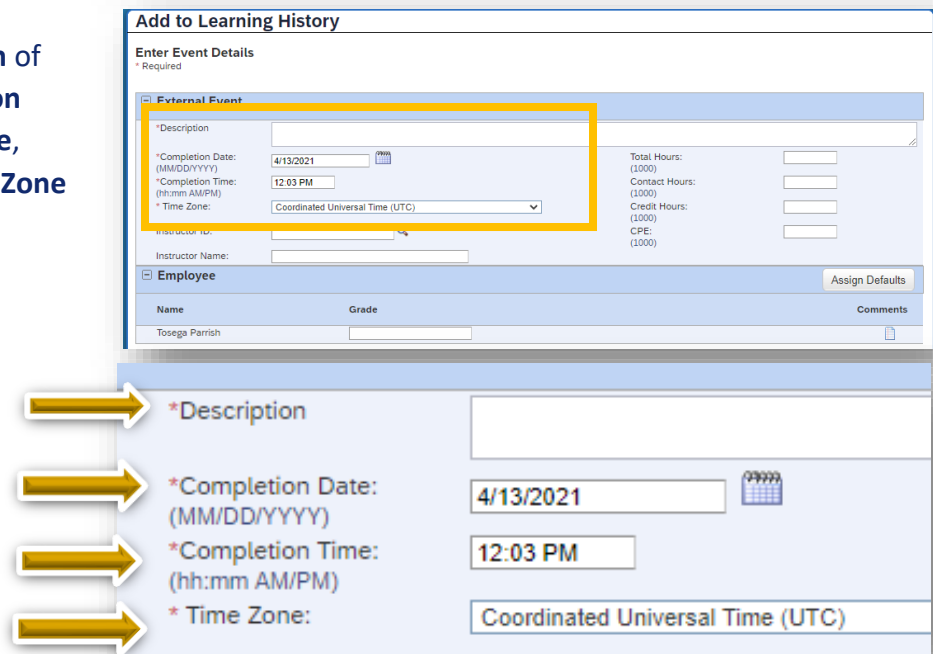
To add an External Learning item completed select **“Add to Learning History”** link on your My Learning page



Select **“External Event”**



Provide: A **description** of the course, **completion date**, **completion time**, and be sure the **Time Zone** is correct.





If possible, please provide **Instructor ID** and/or **Name**

Grade can be left blank

On the right of the screen, you can include:

- **Total Hours**
- **Contact Hours**
- **Credit Hours**
- **CPE**

Name	Grade
Tosega Parrish	<input type="text"/>

Total Hours: (1000)	<input type="text"/>
Contact Hours: (1000)	<input type="text"/>
Credit Hours: (1000)	<input type="text"/>
CPE: (1000)	<input type="text"/>

Select **Continue**

Enter Event Details
* Required

External Event

*Description: TEST

*Completion Date: 4/13/2021 (MM/DD/YYYY)

*Completion Time: 08:16 AM (hh:mm AMPM)

*Time Zone: Eastern Standard Time (America/Indianapolis)

Instructor ID:

Instructor Name:

Total Hours: (1000)

Contact Hours: (1000)

Credit Hours: (1000)

CPE: (1000)

Employee Assign Defaults

Name	Grade	Comments
Tosega Parrish	<input type="text"/>	<input type="text"/>

Cancel Continue

Cancel Continue



Please review all details:

- **Description**
- **Completion Date**
- **Completion Time**
- If there was an **Instructor**
- **Grade/Completion Rate**

Add to Learning History

Confirm Learning Details

Item: Rev
 TEST.

Completion Date: 4/13/2021
Completion Time: 08:16 AM US/Eastern
Primary Instructor:

Total Hours:
Contact Hours:
Credit Hours:
CPE:

Employee

Name	Grade	Comments	Costs	Amount
Tosega Parrish				

Back Add to Learning History Cancel

Once done, please select **Add to Learning History**

Add to Learning History

Confirm Learning Details

Item: Rev
 TEST.

Completion Date: 4/13/2021
Completion Time: 08:16 AM US/Eastern
Primary Instructor:

Total Hours:
Contact Hours:
Credit Hours:
CPE:

Employee

Name	Grade	Comments	Costs	Amount
Tosega Parrish				

Back Add to Learning History Cancel

Add to Learning History

Submit for Approval

Add to Learning History

Submit for Approval

This request requires approval using the steps listed below. If any step does not have a user listed as an approver, you must select one before you can submit the request.

History Record Details

Title: TEST. **Completion Date:** 4/13/2021
Type: External Event **Completion Time:** 08:16 AM America/Indianapolis

Approval Steps

Approval Step	Approvers
Supervisor	Manager Level 1 (Show All)
Admin	Admin (Show All)

Back Submit Cancel

Submit Cancel



You can check and see who the Approve is:

Add to Learning History

Submit for Approval

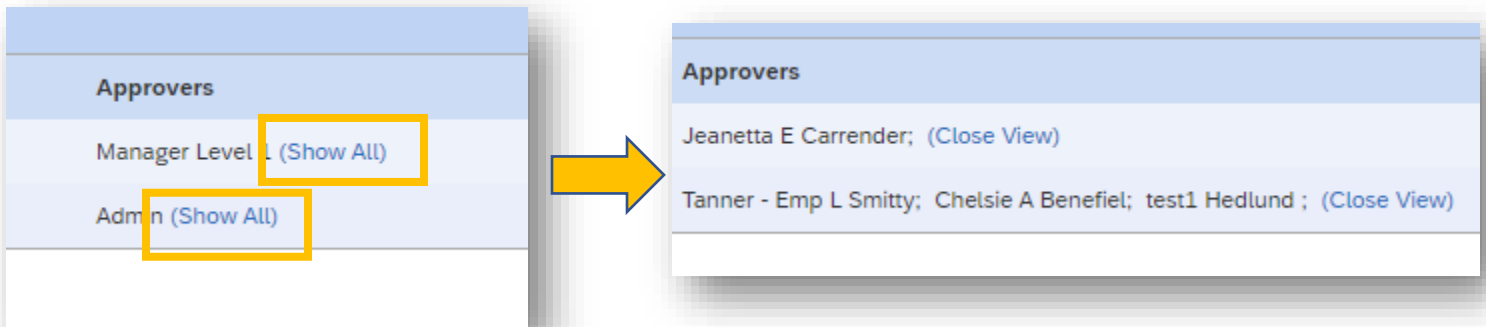
This request requires approval using the steps listed below. If any step does not have a user listed as an approver, you must select one before you can submit the request.

History Record Details	
Title: Test	Completion Date: 4/19/2021
Type: External Event	Completion Time: 02:15 PM US/Eastern

Approval Steps	
Approval Step	Approvers
Supervisor	Manager Level 1 (Show All)
Admin	Admin (Show All)

[Back](#) [Submit](#) [Cancel](#)

Select Show All:



Once you select Submit you should see this next screen:

Add to Learning History

Recording Status

Additional Action Required Before Learning May be Committed

Your request to add to learning history has been submitted and the request for approval has been sent to the required approvers. This event will be committed to history upon completion of all approvals.

- Parrish, Tosega [File Attachments \(0\)](#)



Your request to add learning history has been submitted!

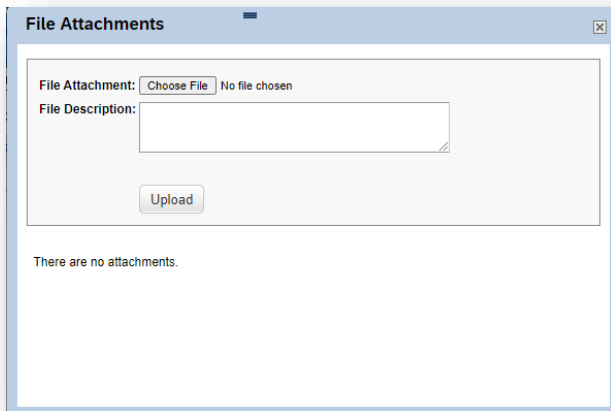
You can select Close.

A screenshot of a web application dialog box titled "Add to Learning History". The dialog has a header bar with the title. Below the header, there is a section titled "Recording Status". Underneath, a blue banner reads "Additional Action Required Before Learning May be Committed". The main content area contains a message: "Your request to add to learning history has been submitted and the request for approval has been sent to the required approvers. This event will be committed to history upon completion of all approvals." Below this message is a list item "Parrish, Tosega" and a link "File Attachments (0)". At the bottom right of the dialog, a "Close" button is highlighted with a yellow box. A second "Close" button is visible on a separate layer below the main dialog.

To Add a Completion Certificate or other related documentation to your request, click **File Attachments**.

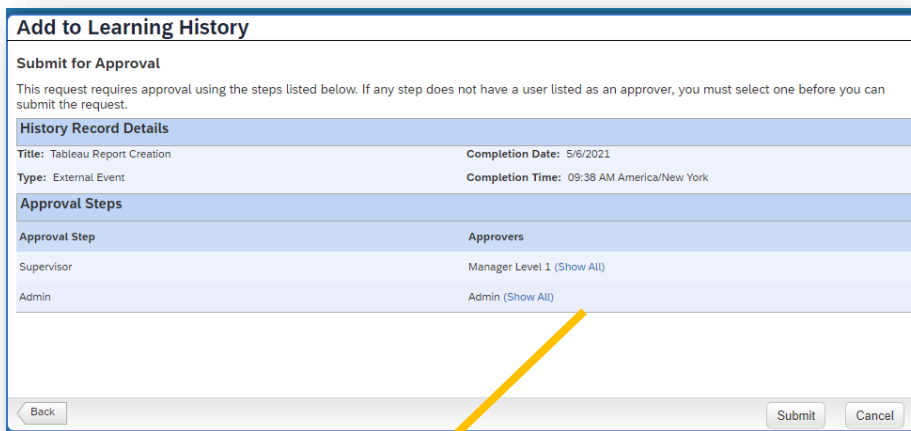
A screenshot of the same "Add to Learning History" dialog box. In this view, the "File Attachments (0)" link is highlighted with a yellow box. The "Close" button at the bottom right is also visible.

Choose File and Upload. The documentation will now be attached to the request.



The 'File Attachments' dialog box contains a 'File Attachment:' field with a 'Choose File' button and the text 'No file chosen'. Below it is a 'File Description:' text area. An 'Upload' button is positioned below the text area. At the bottom of the dialog, it states 'There are no attachments.'

If an employee has **No Manager** listed on their employee record, they will see the following options below. Do not click on the links under Approvers and simply click **Submit**.

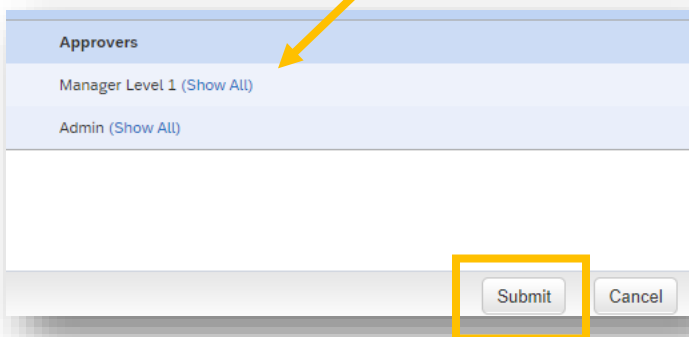


The 'Add to Learning History' dialog box includes a 'Submit for Approval' section with a warning: 'This request requires approval using the steps listed below. If any step does not have a user listed as an approver, you must select one before you can submit the request.' It features a table for 'History Record Details' and 'Approval Steps'.

History Record Details	
Title: Tableau Report Creation	Completion Date: 5/6/2021
Type: External Event	Completion Time: 09:38 AM America/New York

Approval Steps	
Approval Step	Approvers
Supervisor	Manager Level 1 (Show All)
Admin	Admin (Show All)

Buttons: Back, Submit, Cancel



The 'Approvers' dialog box shows a list of approvers: 'Manager Level 1 (Show All)' and 'Admin (Show All)'. A yellow arrow points from the 'Admin (Show All)' link in the 'Approval Steps' table of the previous dialog to this list. The 'Submit' button at the bottom is highlighted with a yellow box.

From this screen the employee will select **Close** on the request and the SPD Admin Team will review and/or approve. After this step the approval will either be routed to the Agency Admin Team or SPD will review with the Agency for final approval.

