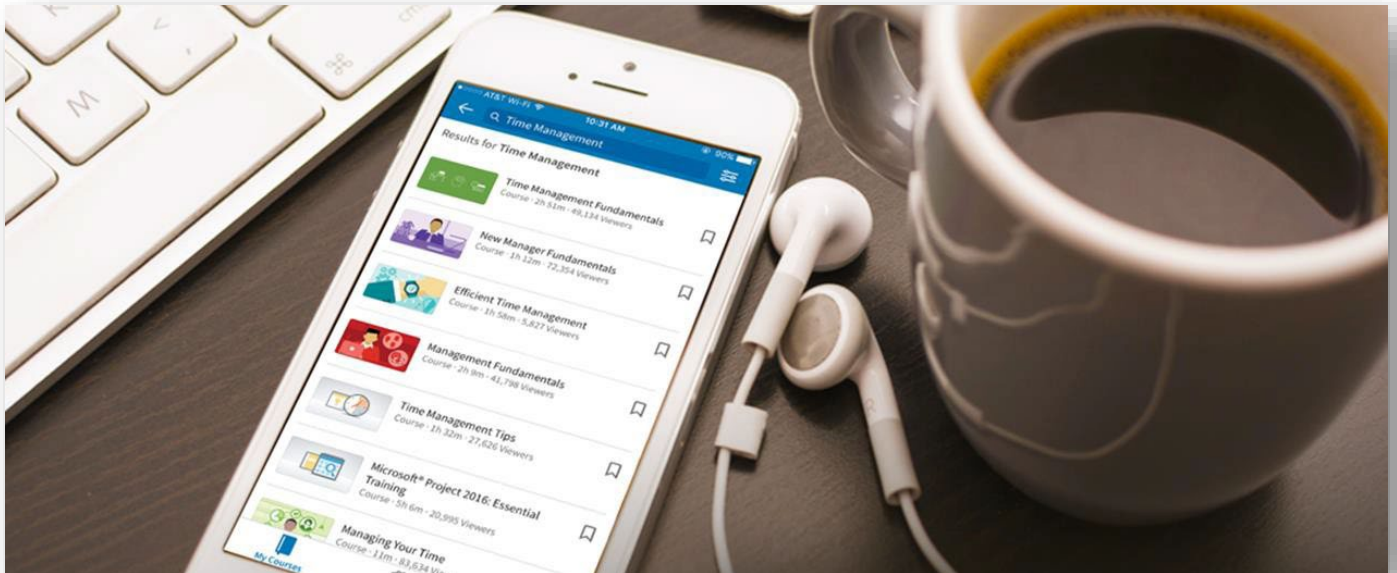


SuccessFactors Learning

Adding External History to SuccessFactors



Indiana State
Personnel Department



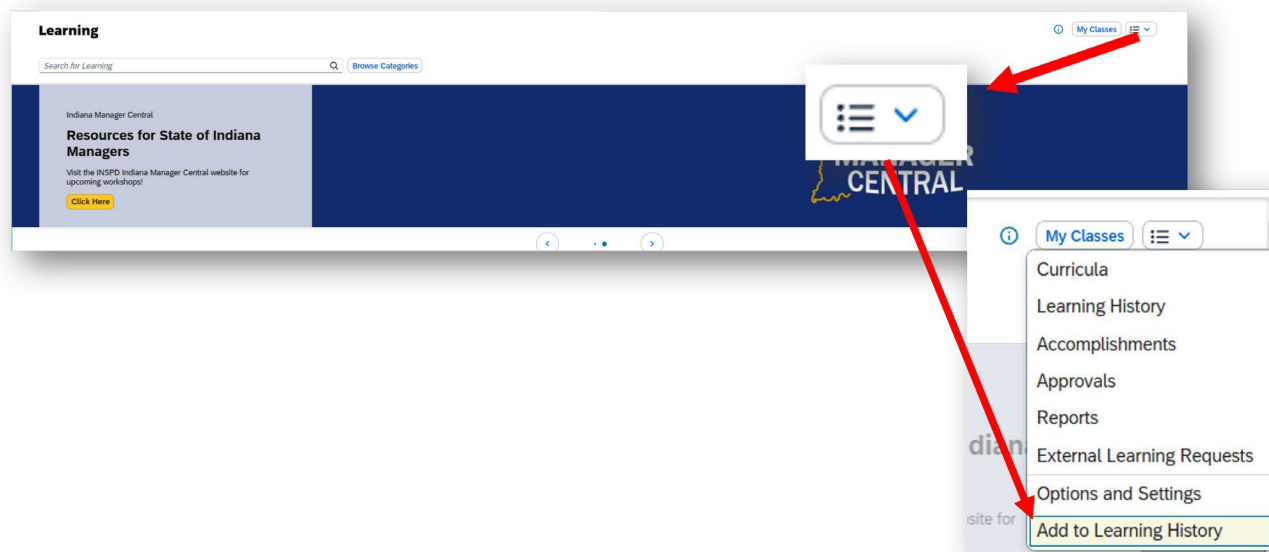


This material was developed for the SuccessFactors Learning Management System. Please contact SPDTraining@SPD.in.gov with any questions or comments.

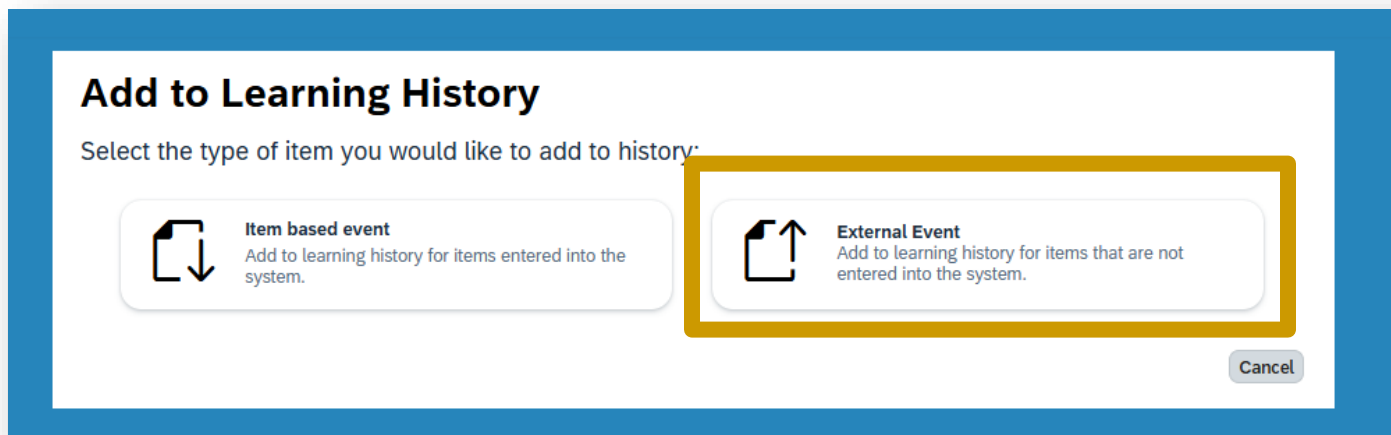
You can also visit the [INSPD Training website](#) for additional resources.



To add an External Learning item completed select icon in the upper right corner. From the drop-down menu, select the last one: **Add to Learning History**.



Select **“External Event”**



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

Add to Learning History

Enter Event Details

Required*

External Event

Description*

Completion Date:(MM/DD/YYYY)*

1/2/2025

Completion Time:(hh:mm AM/PM)*

09:07 AM

Time Zone:*

Eastern Standard Time (America/Indianapolis)

Total Hours:(1000)

Contact Hours:(1000)

Credit Hours:(1000)

CPE:(1000)

Instructor ID:

Instructor Name:

Employee

Assign Defaults

Name	Grade	Comments
Tosega M Parrish		

Back

Continue

Cancel

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**

Instructor ID:

Instructor Name:

Employee

Name	Grade
Tosega Parrish	

Total Hours:(1000)

Contact Hours:(1000)

Credit Hours:(1000)

CPE:(1000)

3.5.2024

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Select **Continue**

Enter Event Details
* Required

External Event

*Description: TEST.

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

*Completion Time: (hh:mm AM/PM) 08:16 AM

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

Instructor ID: [Search]

Instructor Name: [Text]

Total Hours: (1000) [Text]
Contact Hours: (1000) [Text]
Credit Hours: (1000) [Text]
CPE: (1000) [Text]

Employee Assign Defaults

Name	Grade	Comments
Tosega Parrish	[Text]	[Text]

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

SubmitCancel

SubmitCancel

You can check and see who the Approver 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

SubmitCancel

Select Show All:

Approvers
Manager Level 1 (Show All)
Admin (Show All)

➔

Approvers
Jeanetta E Carrender; (Close View)
Tanner - Emp L Smitty; Chelsie A Benefiel; test1 Hedlund ; (Close View)



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)

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

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)

Close



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

A screenshot of a 'File Attachments' dialog box. It has a title bar with a close button. Inside, there's a section for 'File Attachment:' with a 'Choose File' button and the text 'No file chosen'. Below that is a 'File Description:' text area. At the bottom of this section is an 'Upload' button. Below the entire section, it says '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**.

A screenshot of the 'Add to Learning History' form. It has a title bar. Below the title, it says 'Submit for Approval' and a paragraph of text. Then there's a 'History Record Details' section with fields for Title, Type, Completion Date, and Completion Time. Below that is an 'Approval Steps' section with a table. The table has two columns: 'Approval Step' and 'Approvers'. The first row is for 'Supervisor' with 'Manager Level 1 (Show All)' as the approver. The second row is for 'Admin' with 'Admin (Show All)' as the approver. At the bottom are 'Back', 'Submit', and 'Cancel' buttons. A yellow arrow points from the 'Admin (Show All)' link in the table to the 'Approvers' section of the next screenshot.A screenshot of the 'Approvers' section of the form. It has a title bar. Below the title, it lists 'Manager Level 1 (Show All)' and 'Admin (Show All)'. At the bottom are 'Submit' and 'Cancel' buttons. A yellow arrow points from the 'Admin (Show All)' link in the previous screenshot to this section.



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

A screenshot of a web application dialog box titled "Add to Learning History". The dialog box has a white background and a blue border. At the top, there is a section labeled "Recording Status". Below this, there is a blue header bar with the text "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 the message, there is a list of names: "• Carrender, Jeanetta". To the right of the list, there is a link that says "File Attachments (0)". In the bottom right corner of the dialog box, there is a button labeled "Close", which is highlighted with a yellow rectangular box.