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SuccessFactors Learning - Training Planner

Training Planner in a Nutshell

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Course Objectives

❖ Describe the functions supported by the Learning Academy - Training Planner

❖ Set up configuration options needed for Training Planner

❖ Demonstrate interactions to manage training requests:

   ✦ *As user:* create training request for internal and for external training

   ✦ *As supervsior:* review requests and assign training; create multiple team requests

   ✦ *As training manager:* Manage budgets and review requests; create multiple org training requests

❖ Record learning and view requests for *Attended* events

❖ Run reports to compare budgeted to actual amounts

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Lesson 1: Configure and Set Up Training Planner

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Steps to Configure Training Planner

- Go to References > Learning > Training Request Period
- Create one or more training periods

- Go to System Admin > Tools > Data Import
- Create and import a template for Organization Budget

- Go to References > Commerce > Cost Names
- Create one or more cost names and apply to user

- Go to References > Learning > Training Purpose
- Create one or more entries for training purpose

- Go to References > Learning > Training Vendors
- Create records for external training vendors

- Go to organization > Training Managers
- Add one or more training managers

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Configuration Tips for Training Planner

Type of Configuration	Applicable
User Workflows	Learning > Access Training Planner
User Menu	Easy Links > Training Planner
Admin Workflows	User Management > View, Edit, Add Organization Training Budget. Commerce > View, Search, Add, Edit, Copy, Delete Cost Names. Learning > View, Search, Add, Edit, Copy, Delete Training Purpose … Training Vendors … Training Request Period.
Admin Menu Access	Organization > Training Managers, Training Budgets Reports > Run Training Planner Projected vs. Actuals Report. References > Commerce > Cost Names References > Learning > Training Vendors, Training Purposes, Training Request Periods. Notifications (for editing)
Record Configuration	None
System Configuration	None

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Lab: Configure the Time Request Periods

1. Go to **References** > **Learning** > **Training Request Periods > Add New**

2. Provide a period ID and description

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Lab: Designate Training Manager(s)

1. Log in to admin side and go to **Users > Organizations** > organization record > **Training Manager** tab.

2. Search for training managers by **User ID** > select **Add**

3. Remove a training manager if needed using **Remove**

4. Select **Apply Changes**

Edit the Organization

Add Training Managers to the Organization

Enter an User ID or add one or more from list.

User ID: [   ]   Add

Update Training Managers of the Organization

Apply Changes   Reset

Select All / Deselect All

User ID	User Name	Remove
ACME001	Grant, Carla	☐
ACME018	Grandman, Jonathan	☐

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Lab: Import Training Budgets

1. Go to **Import Data > Organization Budget** and download the template

2. Open in Excel and populate with data.

3. To upload the budget, use **Data Import** > select **Record Type** > **Organization Budget**

4. Choose import option > **Add and Update > Submit**

5. Continue and watch for validation

Organization ID(*required)	Request Period (*required)	Total Budget	Immediate Org Budget
ACME	Q1 2014	50000	24000
ACME-FINANCE	Q1 2014		6000
ACME-HR	Q1 2014		6000
ACME-OPS	Q1 2014		14000
ACME	Q3 2013	36500	19000
ACME-FINANCE	Q3 2013		3500

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Lab: Admin Confirms Budget Import

1. Go to **Organizatiion > Organization Budget**

2. View and confirm

Organization ID:	ACME
Description:	Acme Corporation

View the Training Budget for the Organization

Request Period	Total		Suborganizations		Immediate Org	
Q3 2013	36,500.00	USD	17,500.00	USD	19,000.00	USD
Q4 2013	31,700.00	USD	15,200.00	USD	16,500.00	USD
Q1 2014	50,000.00	USD	26,000.00	USD	24,000.00	USD
Q2 2014						

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Lab: Import the Currency Conversion Set

1. Go to **Learning Admin** > **System Admin** > **Tools** > **Data Import** > **Download Template**

2. Select **References** from the **Record Type** drop-down menu

3. Select the **Currency Conversion** worksheet

4. Open the downloaded file and populate with data

5. Import the spreadsheet

Exchange Rate Set ID (*required)	From Currency Code (*required)	To Currency Code (*required)	Rate (*required)
USD_TO_EUR	USD	EUR	0.75
EUR_TO_USD	EUR	USD	1.25
USD_TO_GBP	USD	GBP	1.6
GBP_TO_USD	GBP	USD	0.6

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Lab: Create the External Vendor List

1. Go to **References > Learning > Training Vendors**

2. Select **Add New** and create each record

Add New Training Vendor

*= Required Fields

* Training Vendor ID:	CSU Chico
Vendor Name:	CSU Chico
Address1:	100 Main Street
Address 2:	
City:	Chico
State:	CA
Postal Code:	
Country:	United States

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Lesson 2: Managing Training Requests

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Steps to Manage Training Requests

- User requests internal and/or external training
- User submits request to supervisor

- Supervisor views request and approves, rejects, or defers
- Supervisor submits request to training manager

- Training manager views requests and approves/rejects
- Training manager can download list. Admin can run reports.

- Rejected request is returned to user
- User and supervisor can view status of requests

- User attends training and admin records
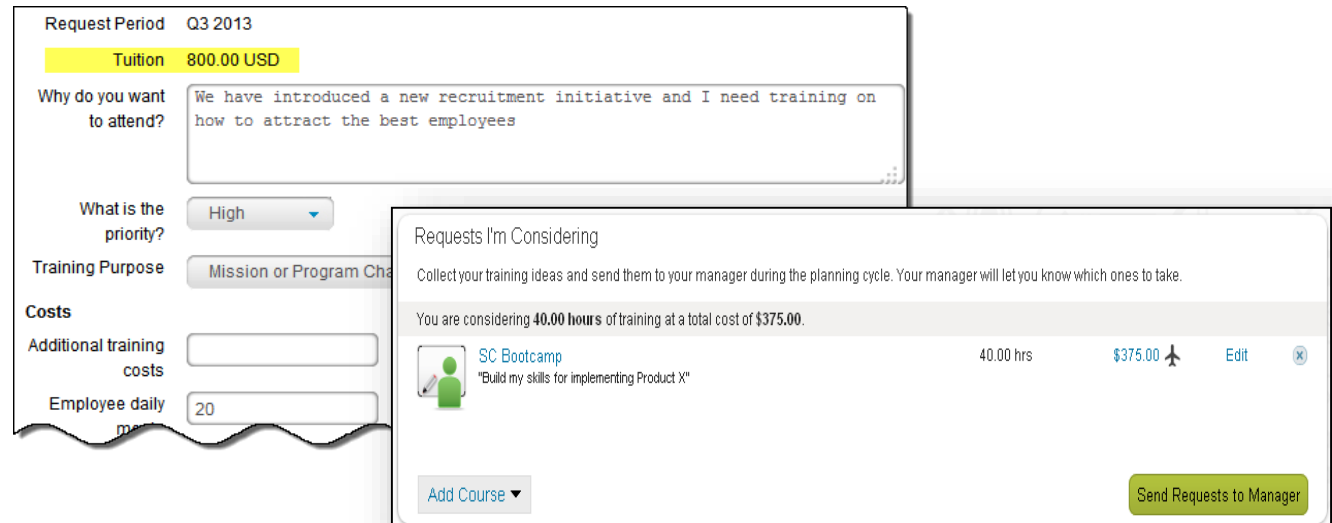- User and supervisor can view learning history

- Supervisor can submit requests for the team
- Training manager can submit requests for an organization

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Lab: User Requests Internal Training

1. Go to **Training Planner** > Select the training period from the drop-down menu > View **My Requests**

2. Go to **Requests I'm Considering** and select **Add Course > Find From Catalog**

3. Search for and add an internal course

4. Complete the form as prompted and send to manager

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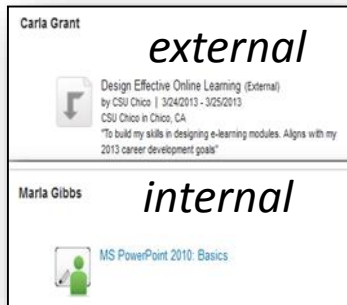
Lab: User Requests External Training

1. Go to **Requests I'm Considering** and select **Add Course > Add Outside Course**

2. Complete the form as prompted, complete, and send to manager

Add Outside Course

If you'd like to take a course that is not listed in your LMS catalog, then enter the details here.

Request Period	Q4 2013
* Course Title	Intermediate SQL Skills
Vendor	Train2Test
Training Location	Paris, FR
Course Begins	Nov/18/2013
Course Ends	Nov/19/2013
* Training Hours	16
Why do you want to attend?	I have been assigned to support our reporting product that requires more advanced SQL query skills
What is the priority?	High
Training Purpose	New Work Assignment

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Lab: Supervisor Reviews Requests

external

internal

1. Go to **Training Planner** > Select the training time period from drop-down menu > view **My Team's Training Requests**

2. Scroll to **New Team Requests** and review requests

3. Use **Add Course** to add a different course as a recommendation

4. Can **Exclude** , then choose **Change Request Period** to move the request or **Reject Course**

5. When complete, select **Send Requests for Review** to pass the request to the organization's Training Manager(s)

6. Can return to list and select **Edit Assignments > Assign** or **Defer**

   NOTE: If supervisor assigns the item to the user BEFORE the request is approved by the Training Manager, supervisor can remove assignment later if the request is rejected.

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Lab: Training Manager Reviews Request

1. Go to **Training Planner** > select the training period from the dropdown > view **My Organization Requests**

2. View the summary list > **View/Edit Requests**

3. Set fixed number of seats > select **Save**

4. Or reject a request and provide a reason

5. Can download a spreadsheet of requests.

Training Planner: My Org Q4 2013 ▾

Enter the budget amounts for each organization. Drill down to provide budgets to suborganizations. You may also view the request details for each organization.

	Hours Requested	Amount Requested		Reviewed	Organization Budget
Acme Corporation (all) 30 headcount	88.00 hrs 2.93/person	$8,910.00 297.00/person	View requests	☐	$31,700.00 1,056.67/person

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Download Report to a Spreadsheet
Sample Extract

Request Period	Organization	Supervisor	Request Type	Request Status	Training Type
Q4 2013	Acme Corporation	Frederick, Kristin	User-generated	Assigned	External
Q4 2013	Acme Corporation	Grant, Carla	Training Manager-generated	Assigned	Internal
Q4 2013	Acme Corporation	Grant, Carla	Training Manager-generated	Assigned	Internal
Q4 2013	Acme Corporation	Grant, Carla	Training Manager-generated	Assigned	Internal
Q4 2013	Acme Corporation	Grant, Carla	Supervisor-generated	Assigned	Internal
Q4 2013	Acme Corporation	Grant, Carla	Supervisor-generated	Assigned	Internal
Q4 2013	Acme Corporation	Grant, Carla	Supervisor-generated	Supervisor Sent	Internal
Q4 2013	Acme Corporation	Frederick, Kristin	Supervisor-generated	Training Manager Rejected	Internal

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Lab: Supervisor Allocates Approved Seats

Courses to be Assigned ⚠ Assignment Limits - 3 course(s)

Budgets have been reviewed! Assign the courses below within the limits set by your organization.

	Hour(s)	Costs	
Carla Grant	88.00 hrs	$2,860.00	Edit Assignments

SC Bootcamp   40.00 hrs $375.00 ✈
"Build my skills for implementing Product X"

Select An Action ▾

Cancel   Save

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Lab: Record Learning History and Cost

1. Go to **Record Learning Event** - **Financial**

2. Select the item and the users

3. This is a sample screen to record external learning with a cost of $2000. Notice that you must select an Account Code, in this case the organization's account code (ACME)

User	Price (0.00)	/ Currency	Cost Center Account Codes
	Cost Name		Amount (0.00)
mahoff1 (Hoff, Mark Q)	2000	USD (US Dollar) ▼	ACME Edit
		All Costs below are in: USD (US Dollar) ▼	
	Lodging		0
	Mileage		0
	Tuition		
	Ticket		0

Lab: User/Supervisor Views Attended

Training Requests You Have Sent

These courses have been sent to your manager for review. You will be notified via email for status updates.

You have requested **8.00 hrs** of training at a total cost of **$1,000.00**.

Managing Performance Problems: Establishing a Performance Plan	8.00 hrs	$1,000.00	✅ Attended

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Lab: Run TP Report

Organization:	ACME-CORP
Include sub-orgs:	◉ Yes ○ No
Request Period:	Q42012

Sample output in CSV where 4 out of 5 students attended as planned. Deviation shows the difference

Supervisor	Supervisor Name	Organization	Email	Measure	Projected Amount		Actual Amount		Deviation	
*********	Grant, Carla	Sales		Cost - Tuition	10,000.00	USD	8,000.00	USD	2,000.00	USD
*********	Grant, Carla	Sales		Cost - Lodging while attending training	0	USD	0	USD	0	USD
*********	Grant, Carla	Sales		Cost - Mileage for personal car	0	USD	0	USD	0	USD
*********	Grant, Carla	Sales		Cost - Ticket - airfare or train	0	USD	0	USD	0	USD
*********	Grant, Carla	Sales		Cost - Tuition for the course	0	USD	0	USD	0	USD
*********	Grant, Carla	Sales		Hours	200		160		40	

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Report Sample – TP Projected/Actuals

❖ Output when 2 seats were approved for Item ABC and 3 users have learning history for Item ABC for this training request period.

❖ Deviation shows amount exceeding the budget

❖ There is no report that lists the approved/assigned users. The supervisor needs to track this level of detail.

Supervisor	Org ID	Email	Measure	Projected		Actual		Deviation	
Grant, Carla	Sales	cgrant@acme.com	Cost - Tuition	0	USD	0	USD	0	USD
Grant, Carla	Sales	cgrant@acme.com	Cost - Lodging while attending training	600	USD	1,005	USD	-405	USD
Grant, Carla	Sales	cgrant@acme.com	Cost - Mileage for personal car	80	USD	107	USD	-27	USD
Grant, Carla	Sales	cgrant@acme.com	Hours	80		120		-40	

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Report Sample – TP Projected/Actuals (PDF)

❖ PDF report output when 2 seats were approved for Item ABC and 3 users have learning history for Item ABC for this training request period. Deviation shows amount exceeding the budget

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Lab: Supervisor Requests Seats for Team

Add Training Request for Creative Recruiting Strategies

Request Period	Q4 2013
Tuition	800.00 EUR
What is the priority?	Normal
Training Purpose	Mission or Program Change
* How many Seats do you need?	3

Costs (per person)

Additional training costs	[blank] EUR
Employee daily meals	12
Lodging while attending training	[blank]
Mileage for personal car	[blank]
Transportation (not personal car)	8

Target Population

Staff participating in new initiative for recruiting staff

Cancel   Add Course

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Lab: Supervisor Review Team Requests

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Lab: TM Submits Multiple Requests for Org

1. Selects **Add Organization Request**
2. Select **Find From Catalog** > search for item and select Add Course
3. Add details such as:
   a. Select Training Purpose
   b. Designate the number of seats
   c. Edit the related costs
   d. Describe the Target Population
4. Select **Add Course** when complete

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Training Manager: Reject an Approved Request

1. Go to Training Planner > My Organization Requests > select View Requests.
2. Select View/Edit Requests > select Reject and enter a comment > select Reject to finalize.

Supervisor : Respond to a Rejected Request

1. Go to **Training Planner** > select **My Training Team's Requests**
2. Review the comments from the training manager
3. Select **Save** and re-submit the request

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Course Wrap Up and Review

❖ Described the functions supported by the Learning Academy - Training Planner

❖ Set up configuration options needed for Training Planner

❖ Demonstrated interactions to manage training requests:

  ✦ *As user:* created training request for internal and for external training

  ✦ *As supervsior:* reviewed requests and assigned training; created multiple team requests

  ✦ *As training manager:* Managed budgets and reviewed requests; created multiple org training requests

❖ Recorded learning and viewed requests for *Attended* events

❖ Ran reports to compare budgeted to actual amounts

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Thank you.

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