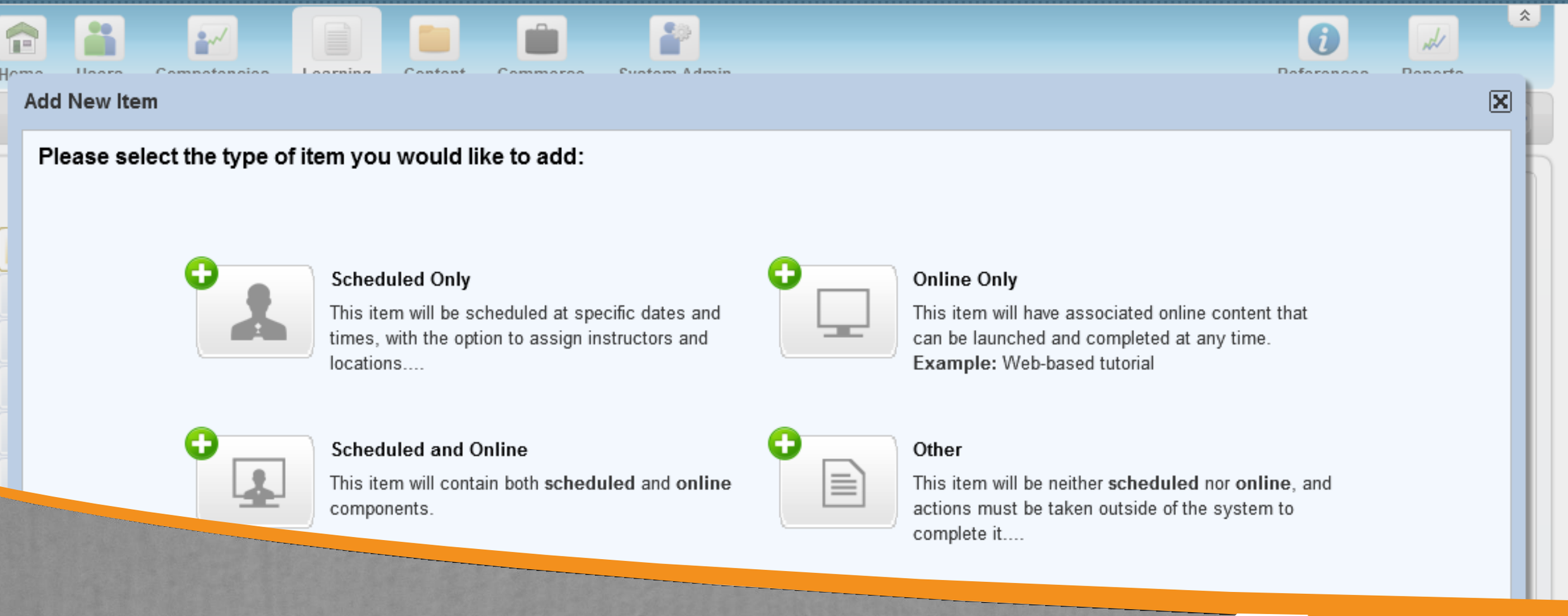

Items

Gain detailed knowledge of the item record and learn how to work with items in SuccessFactors Learning.

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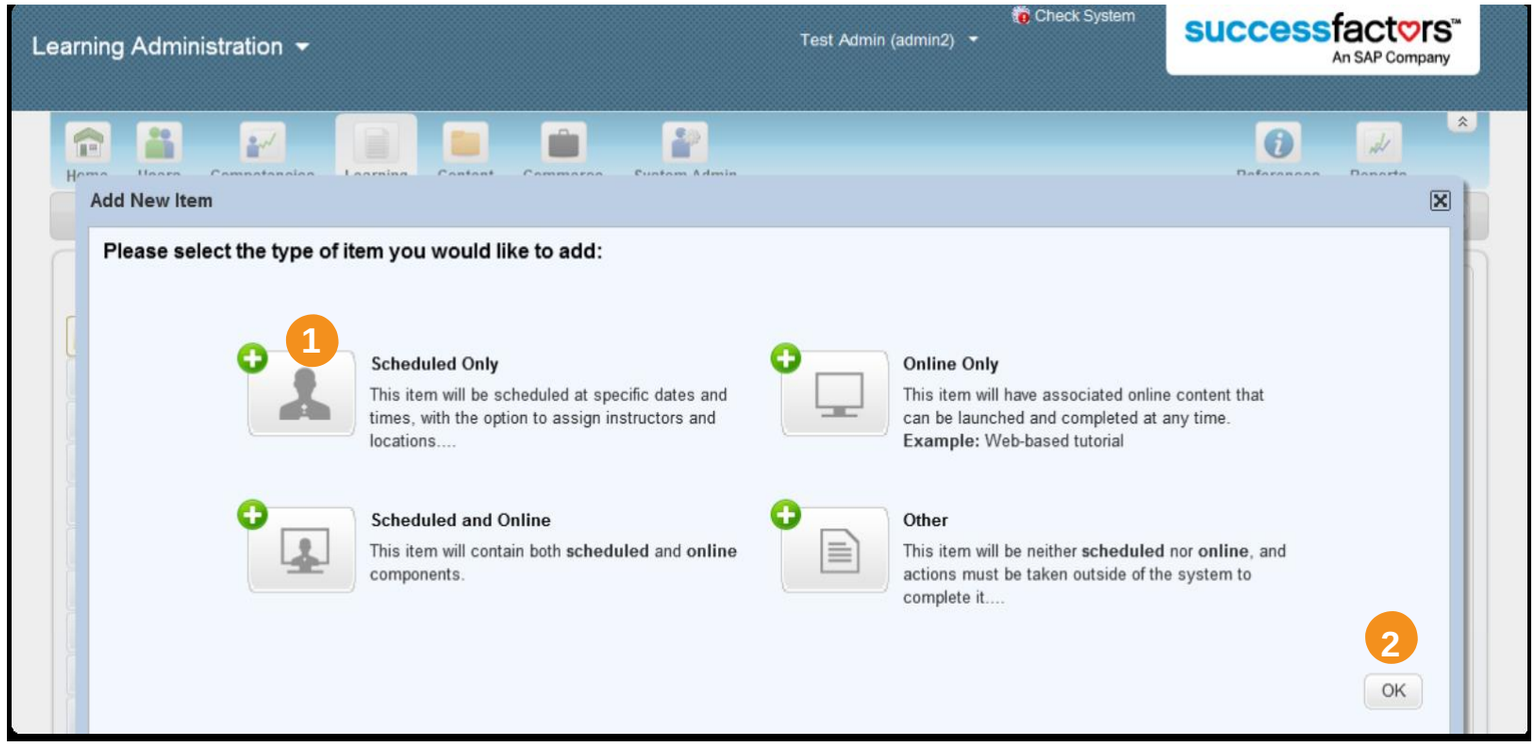
Items: Main Concepts

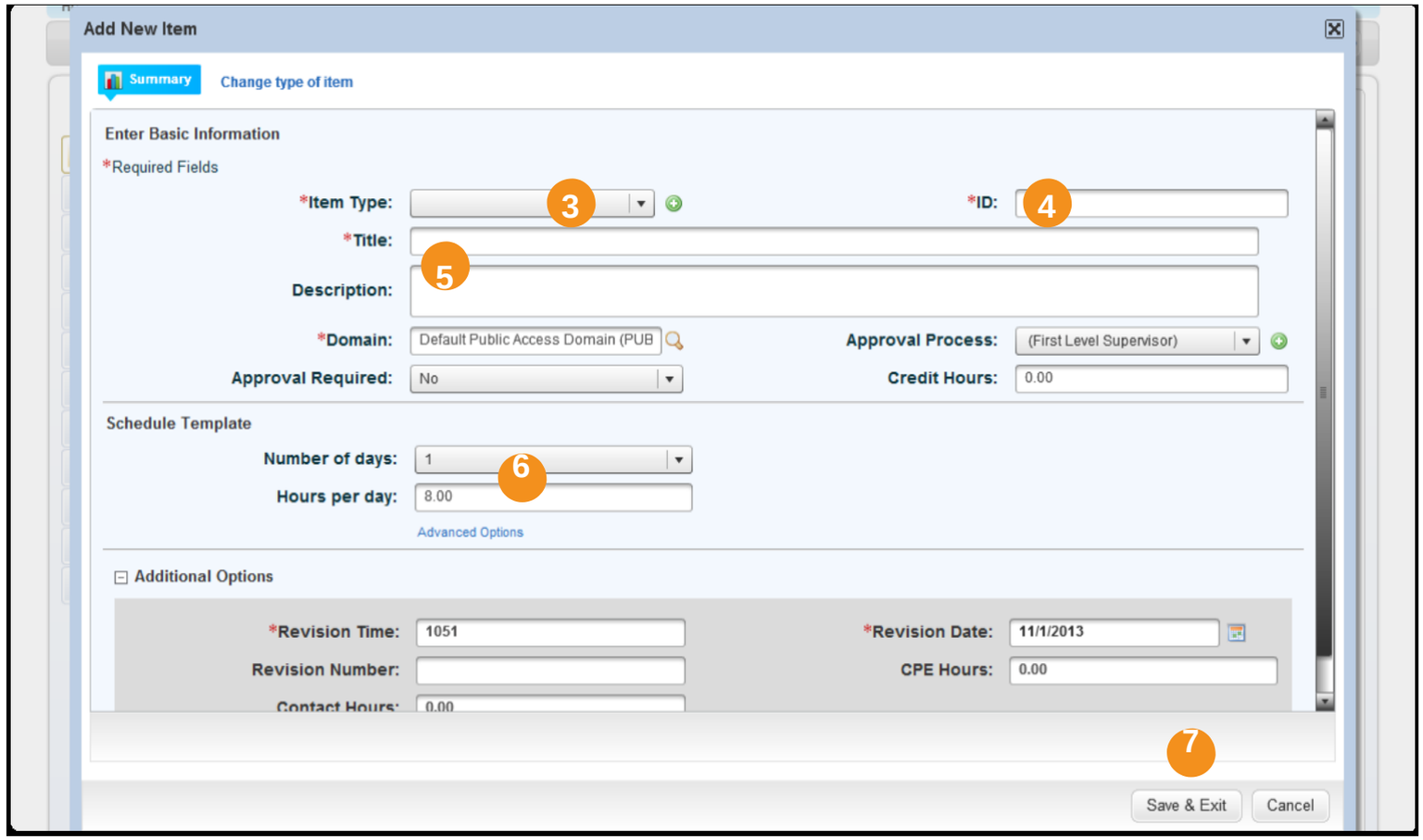
An item is an assignable unit that can be tracked in the SuccessFactors Learning system. It may be a learning or non- learning activity.

Items are usually thought of as “courses”; however, they can be much more. For example: reading a standard operating procedure or attending a mandatory all-hands meeting.

Admin Tools > Learning > Learning Administration > Learning > Add Item

1. Select the item classification.
2. Click ***OK***.
3. Select an ***item type*** from the drop-down menu. This is a globally defined reference that helps categorize items.
4. Enter an ***item ID***. It is recommended that a standard ID naming convention be applied to items and all records in the system. Item IDs can also be auto-generated by the system if the configuration is enabled.
5. Enter the item title and domain. You can also enter a description of the item.
6. Enter the number of days and number of hours.
7. Click ***Save & Exit***.





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Items: Main Areas of the Item Record

The item record is divided into three main areas: Core, Related, and Actions.

Admin Tools > Learning > Learning Administration > Learning

1 Core Area (Summary Tab)

The ***Core area***, also referred to as the ***Summary*** Tab in the online Help, contains the basic information of the item record, including the item title, item key, description, and classification.

2 Item Description

Format the item description and add hyperlinks to make it more visually appealing.

3 Edit Item Thumbnail

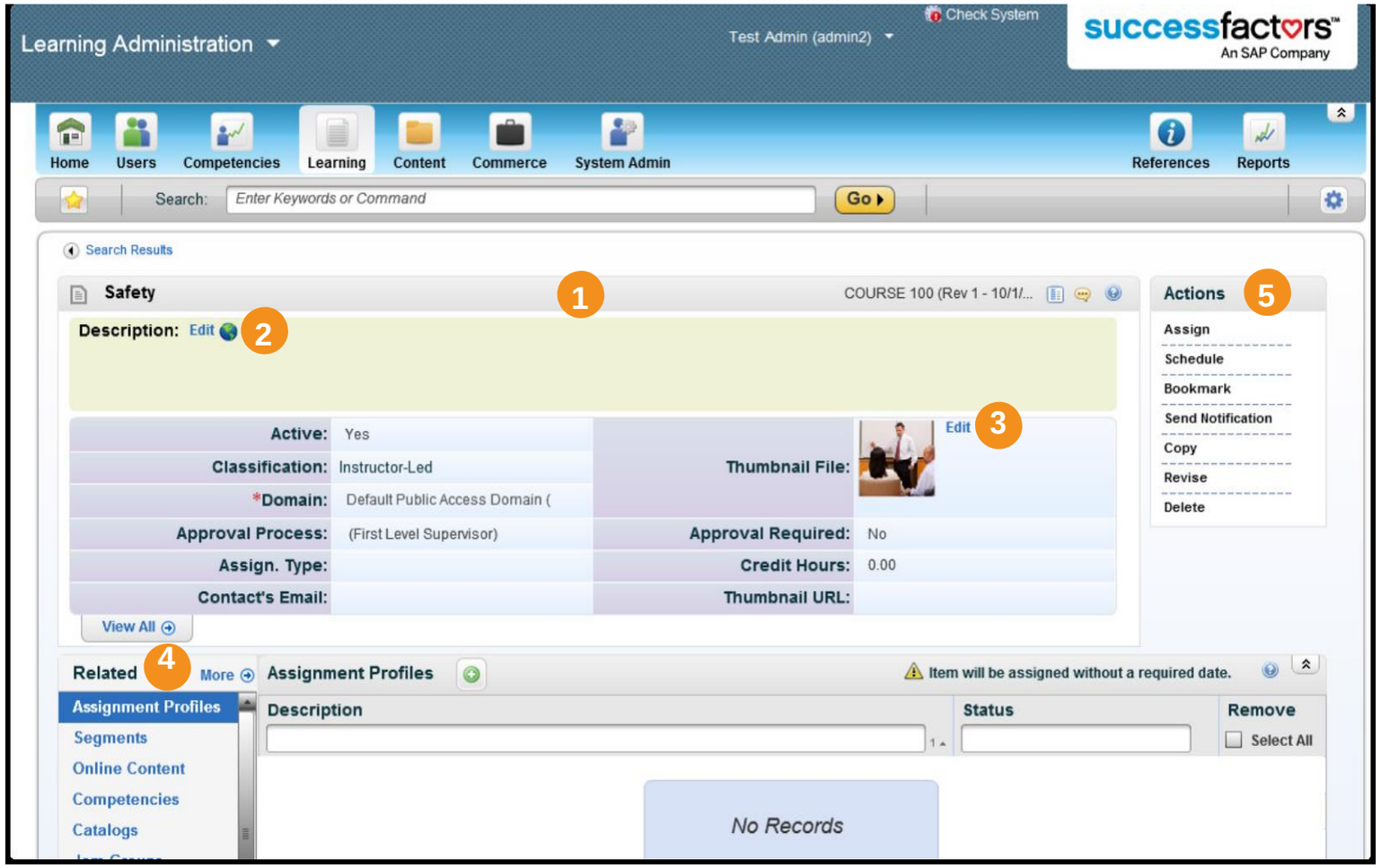
You can globally enable custom thumbnail images and upload images for each item. The images will display on the Learning Plan, Item Details, and Catalog search results. When no custom images are uploaded, the system will display either global default icons or photos.

4 Related Area

The ***Related area*** of the item record contains additional information regarding the item. When you select a tab on the left, the subject's details are displayed on the right.

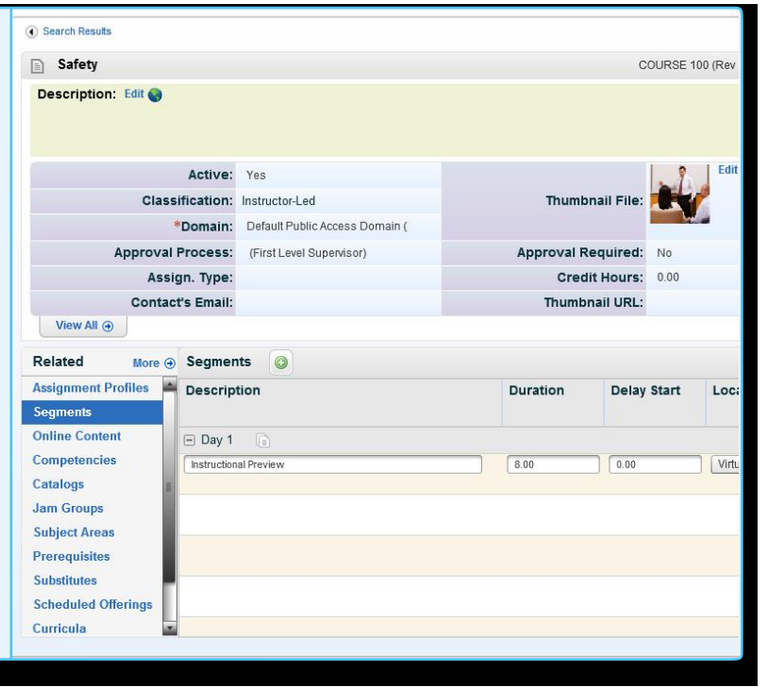
5 Action Areas

The ***Actions area*** of the item record contains links to additional actions that can be taken on the item record, including: Assign, Schedule, Bookmark, and Send Notification.



Spotlight: Working with Segments

A segment is a block of time within a scheduled offering displayed on the item's Segments tab. The default segments, added when the item was created, are used to build out the actual training schedule when the item is scheduled in the LMS.



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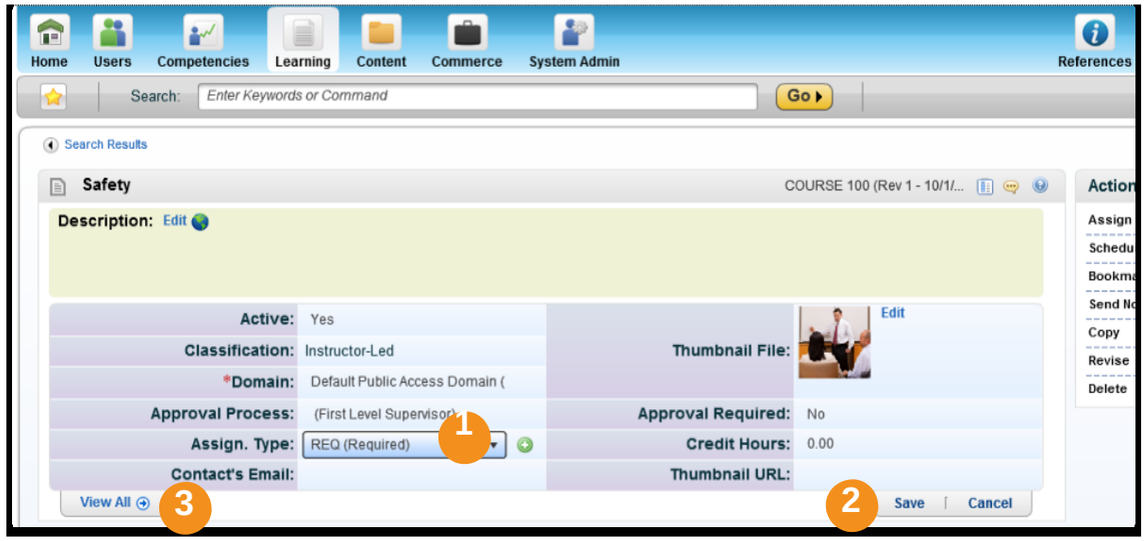
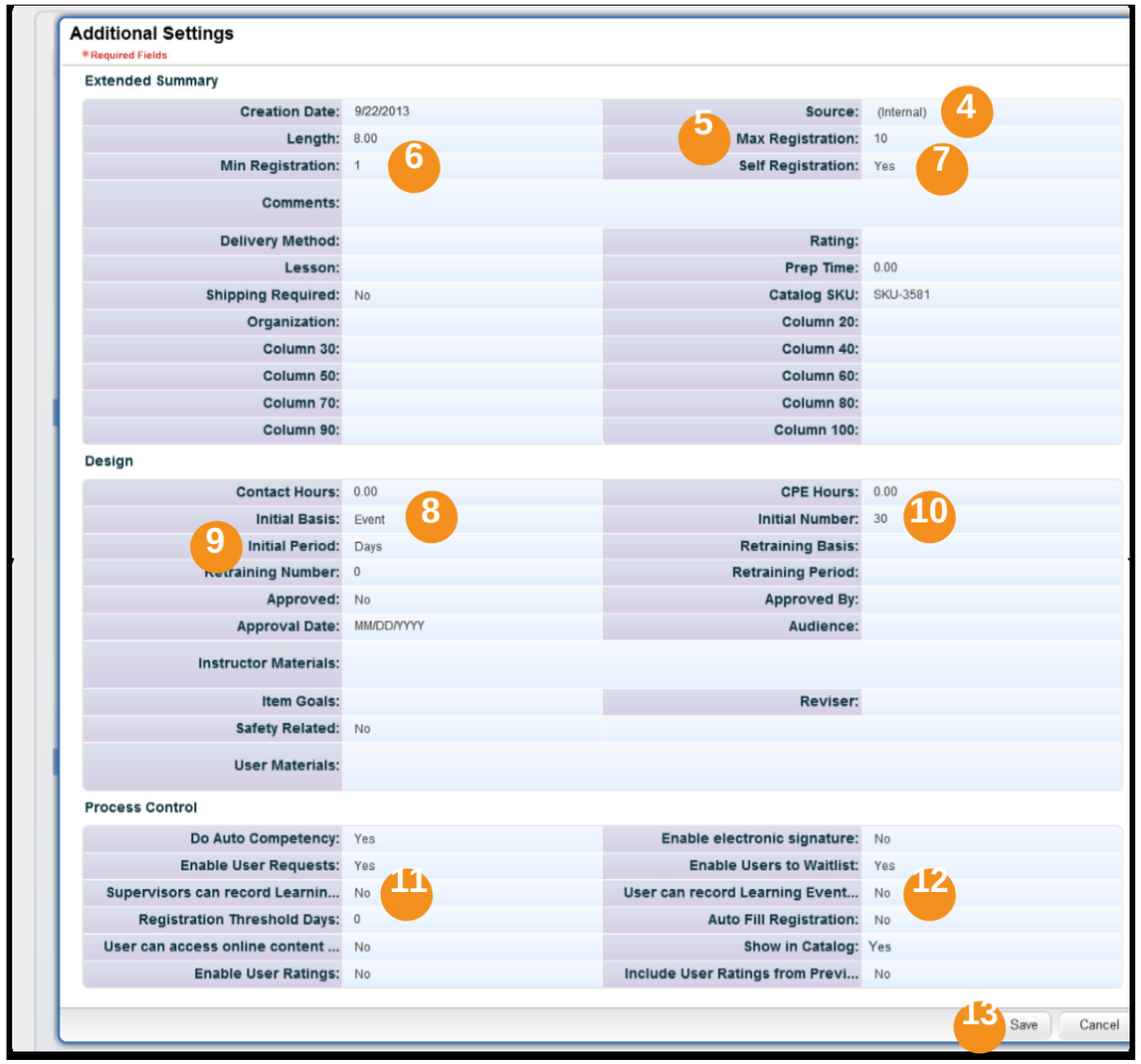
Main Areas of the Item Record: Step by Step

Add Information to Item's Core Area Tabs

Admin Tools > Learning > Learning Administration > Learning > Items

1. Click the ***Assign Type*** field and select ***Required (REQ)*** from the drop-down menu.
2. Click ***Save***.
3. Click ***View All***.
4. In the ***Summary*** section, click the ***Source*** field and select ***Internal (INT)*** from the menu.
5. In the ***Extended Summary*** section, click the ***Max Registration*** field and enter a default number of maximum users that should be enrolled when the item gets scheduled.
6. Click the ***Min Registration*** field and enter a default number of minimum users that should be enrolled when the item gets scheduled.
7. Click the ***Self Registration*** field and select ***Yes*** from the drop-down menu (if not already selected by default).
8. In the ***Design*** section, click the ***Initial Basis*** field and select ***Event***.
9. Click the ***Initial Period*** field and select Days.
10. Click the ***Initial Number*** field and enter 30. This will give users who are assigned this item, 30 days from the assignment date to complete it.
11. In the ***Process Control*** section, click the '***Supervisors can record Learning Event***' field and select ***No*** (if not already selected by default).
12. Click the '***Users can record Learning Event***' field and select ***No*** (if not already selected by default).
13. Click ***Save***.





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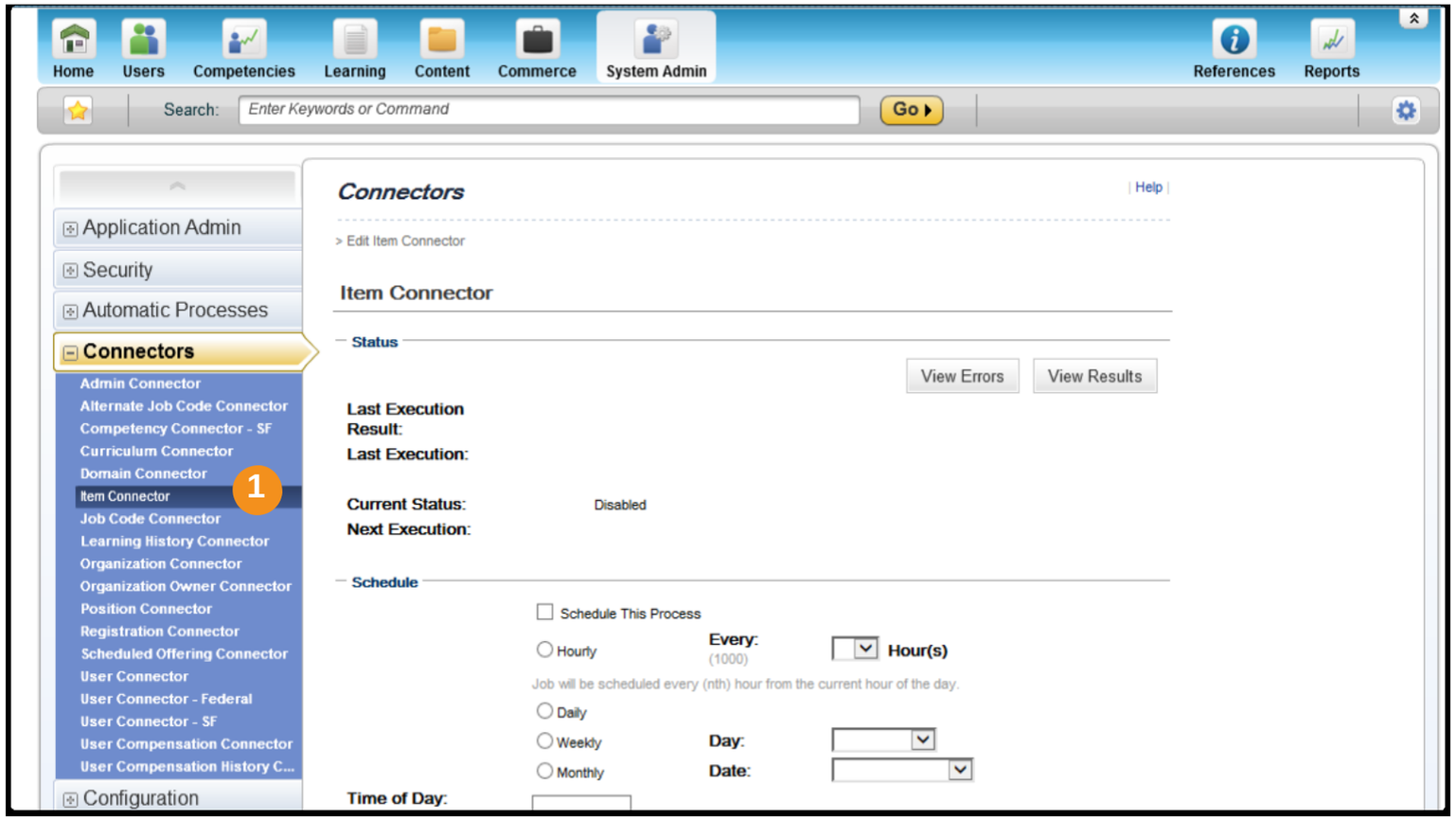
Items: Associating Competencies

A competency is an aspect of job knowledge and proficiency as defined by an organization and represents a skill, attitude, or ability that is required of a user as it relates to his or her job or area of responsibility. It may represent a specific goal and desired outcome of training.

Admin Tools > Learning > Learning Administration > System Admin > Connectors

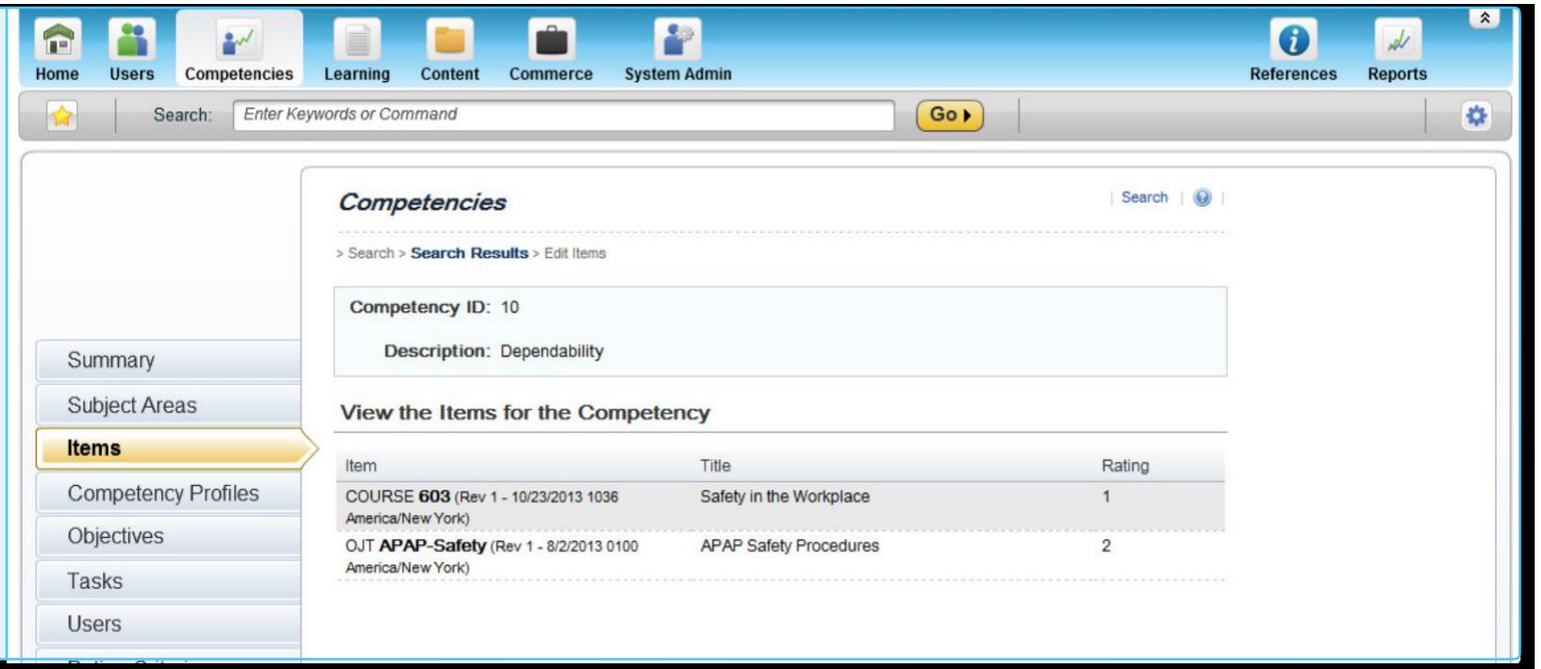
1 Batch Alignment

The batch alignment process provides the capability to associate multiple items with multiple competencies and set a mastery level via the item connector.



Spotlight: Associating Competencies with Items
Admin Tools > Learning > Learning Administration > Competencies

The Learning Needs Management Model and the Competency Management Model can be used together or independently. When the two models are merged, an association is made between an item and a competency. If a user has a current competency gap, completing an associated training course may close that gap.



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Items: Associating Competencies

Admin Tools > Learning > Learning Administration > Learning > Items

2 Adding Catalog Information

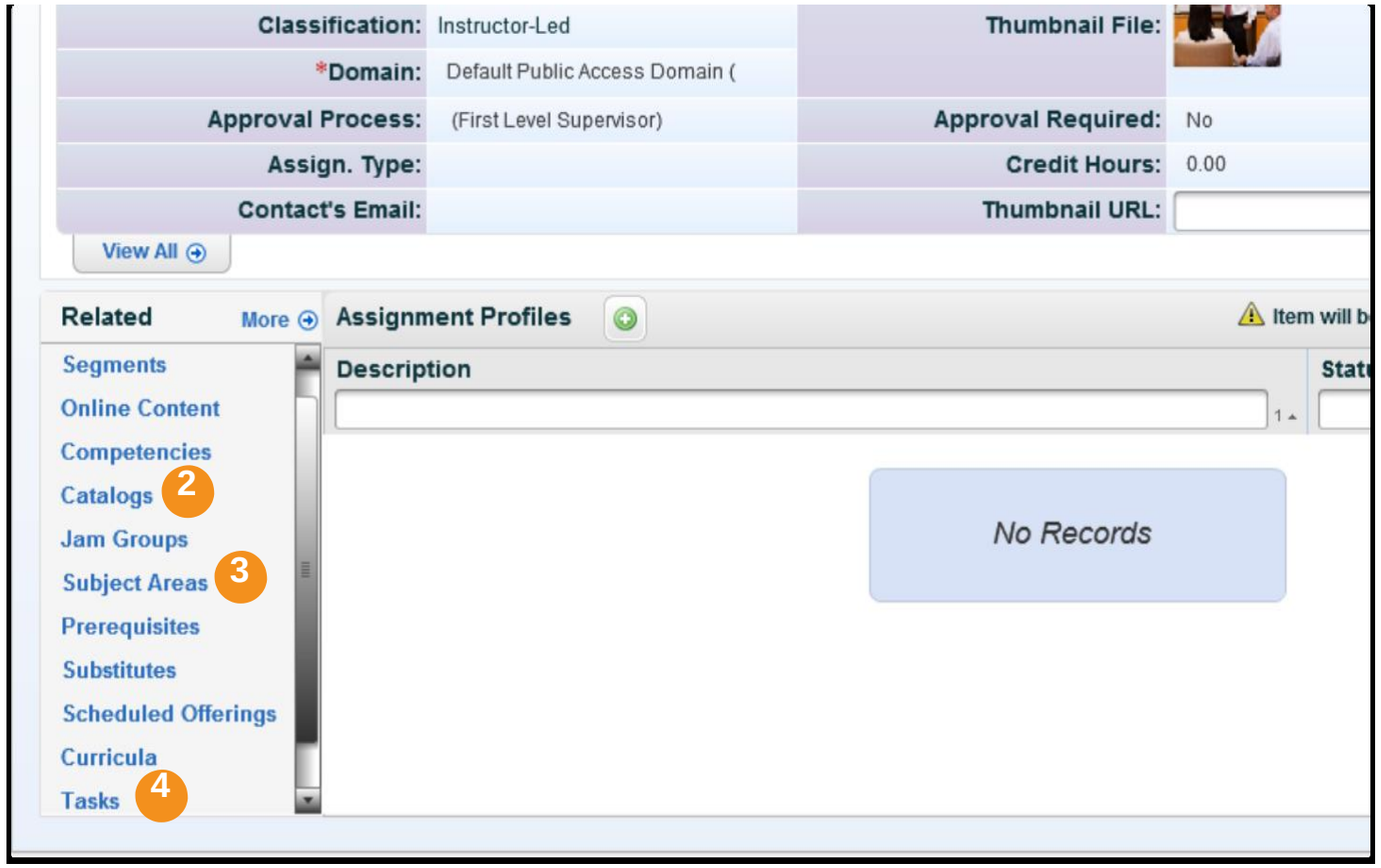
A catalog is used to make items not assigned by administrators or supervisors, available to users. Access to a catalog is provided through an assignment profile and users may have access to more than one catalog.

3 Adding Subject Areas to an Item

Users have the ability to browse catalogs by subject area. Items can be associated with one or more subject areas. If an item has a subject area, it is displayed on the Browse Catalog page.

4 Creating Task Checklists

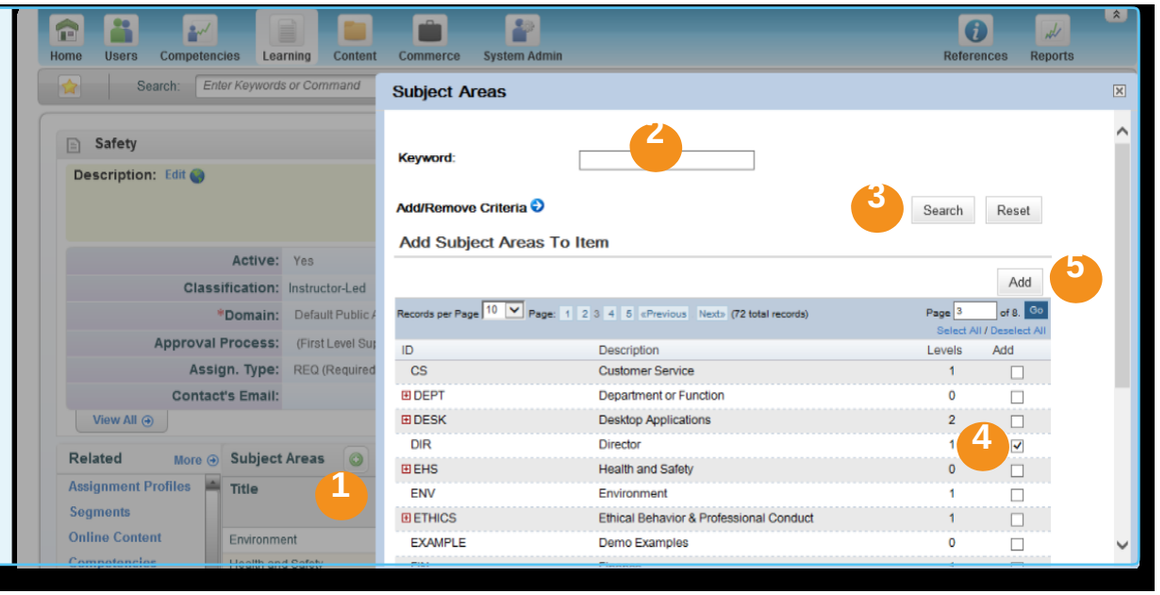
Task Checklists allow customers to build lists of specific tasks that can be assigned through Items. The assignee can then designate one or more observer to watch them complete the assigned list. An observer fills out the Checklist on behalf of the assignee and adds commentary on each task and the overall Checklist. The observer then marks the Item itself complete, either successfully or not-successfully.



Adding Subject Areas to an Item

Admin Tools > Learning > Learning Administration > Learning > Items

1. Click the ***Add New Subject Areas*** icon.
2. Enter the keyword information.
3. Click ***Search***.
4. Check the ***Add*** checkbox next to search result.
5. Click ***Add***.



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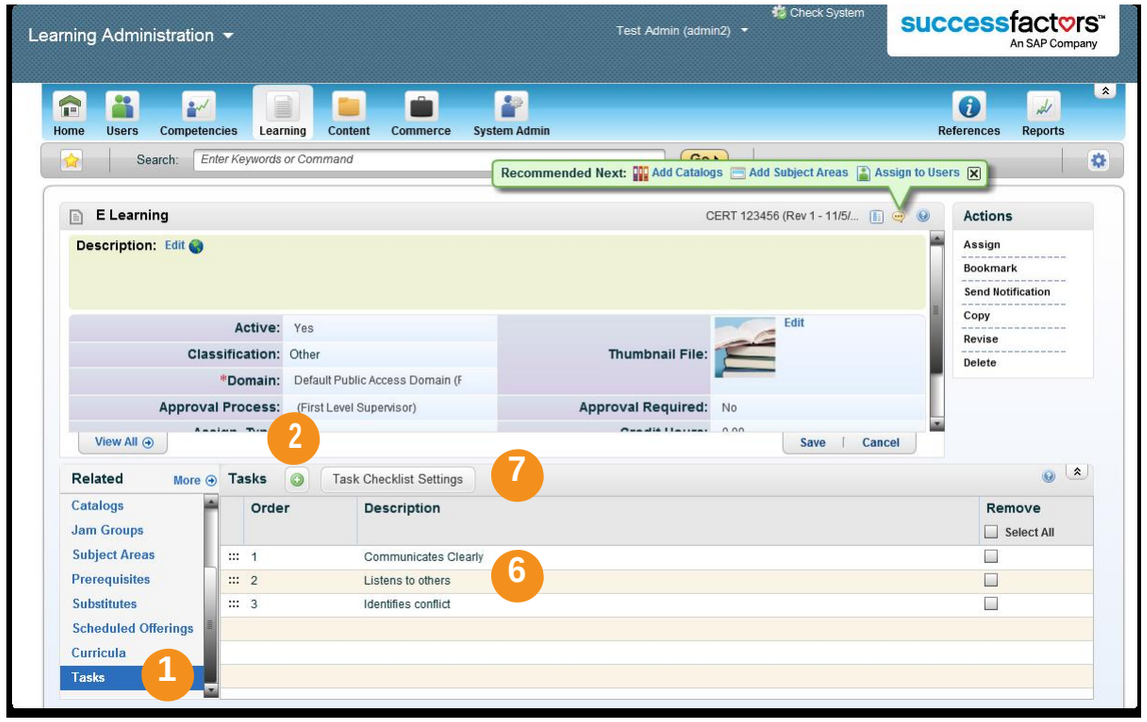
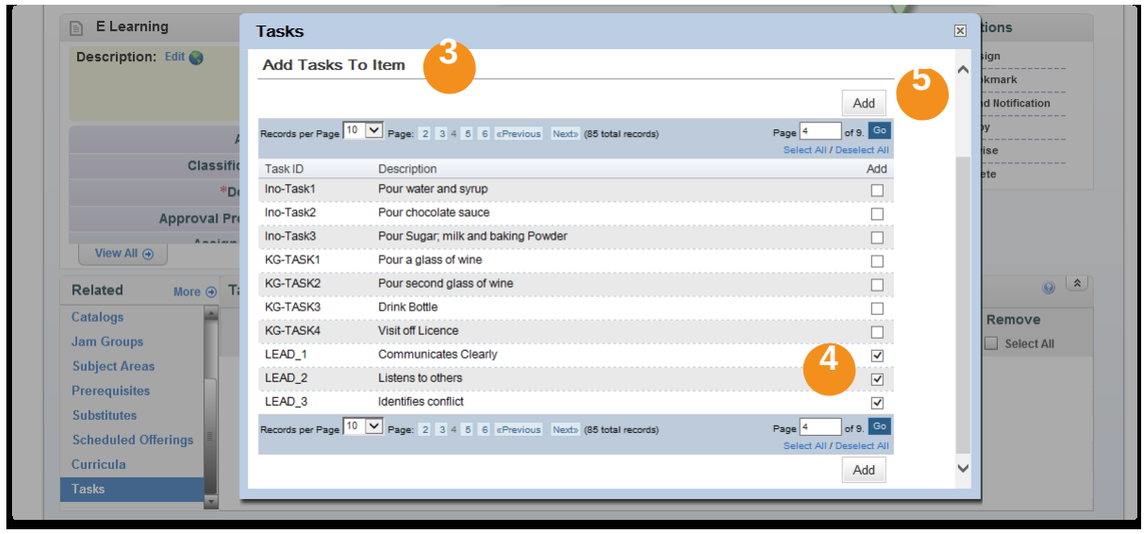
Associating Competencies: Step by Step

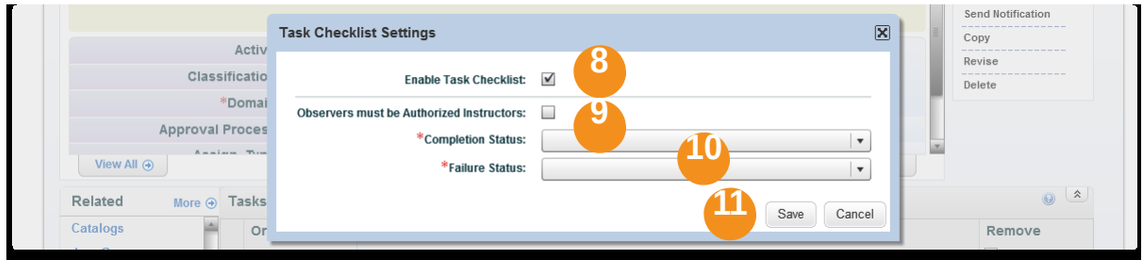
Creating Task Checklists

Admin Tools > Learning > Learning Administration > Learning > Items

1. Select the ***Tasks*** tab in the ***Related*** area of an item.
2. Select the ***Add New Tasks*** button.
3. Enter a keyword and click ***Search*** to find available tasks.
4. Select one or more tasks listed.
5. Click ***Add*** to add the selected tasks to the item's task list.
6. Once added to the item, tasks can be re-ordered by dragging and dropping. If any changes were made to the task list, click ***Save***.
7. Click ***Task Checklist Settings***.
8. Check the ***Enable Task List*** checkbox.
9. Check the ***Observers must be Authorized Instructors*** checkbox, if you wish to enforce observer selection from pre-defined list.
10. Select a completion and failure status.
11. Click ***Save***.







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