

Accessing the LMS as an Excluded Contractor

Excluded Contractor - User Guide

Table of Contents

Table of Contents.....	2
SuccessFactors Learning.....	3
Access and Navigation	3
Password Reset.....	3
View Learning Assignments	4
Print a Certificate of Completion	4
Request a Tech Task Observation	4
Workday Learning.....	5
Setting Up Your Access	5
Access and Navigation	5
Two-Factor Authentication and Password Reset.....	6
View Assigned and Unassigned Learning.....	6
How to Select an Equivalent Offering.....	6
How to Launch Program	6
How to Enroll in a Scheduled Offering.....	7
How to Drop Enrollment.....	7
Access Your Learning Certificates	8
View Transcript	9

SuccessFactors Learning

Purpose: Only those who are required to complete Technical Tasks (Tech Tasks) will need access to SuccessFactors to request for observations and to receive credit. This section covers how to access SuccessFactors Learning, how to view learning assignments, request an observation, and more.

Note: Confirm with your leader or leader's delegate that they have requested SuccessFactors LMS access for you through SailPoint.

Access and Navigation

1. Copy and paste the following web address to your browser address bar and press enter, or click on the link below:

<https://performancemanager8.successfactors.com/login?company=TransCanada&loginMethod=PWD#/login>

2. Enter the username and password that have been emailed to you, both are case-sensitive.
3. Click **Log In**.
4. Select a personal security question and enter the answer. The system will confirm that your answer has been saved and will log you into the LMS.

Note: If this is your first time logging in, you will be prompted to change your password. Your password must contain each of the following:

- Lower case letter(s)
 - Upper case letter(s)
 - Number(s)
 - Symbol(s)
 - Between 15-18 character long
5. Click **Home** and select **Learning** from the menu.

Password Reset

If you do not recall your password, you can reset it using the security question you have set up.


1. Navigate to the login screen.
2. Click on the **2nd** question mark to use **Forgot Password** feature.
3. Enter your numerical username then click **Reset**.
4. Enter the answer to the security question you have set up. Please note that it is Case Sensitive, i.e. uppercase, lowercase must be correct.
5. Click **Submit**. You will be prompted to change your password and set a new security question.

Note: If you require assistance with your login information, contact the Service Desk at Canada/U.S.: 1.888.546.3484 | Mexico +525511002991.


View Learning Assignments

The My Learning Assignments tile includes a list of items you are required to complete.

How to Change View

The default view setting is set to card view. To switch to list view, click the **List View** icon  to condense the information.

How to View Summary

To see a summary of items that are overdue, due next, and due later, click the **Shrink My Learning Assignments tile** icon  by hovering mouse over the top right corner of the tile.

How to Change Sort Option

You can sort items based on the due date or priority. To change the order of items, click the **Sort By** option located at the top right corner of the tile.

Print a Certificate of Completion

1. Go to the **Learning History** tile and click **View All**.
2. To print a Certificate of Completion, you can either:
 - a. click the **Printer Icon** next to the item.
 - b. hover over the item title and select **Print Certificate**.

Note: A report window will open while your Certificate of Completion is being generated. Do not close this window until the Certificate of Completion opens.

3. Verify the information on certificate.
4. Select **File > Print**

Request a Tech Task Observation

Under My Learning Assignments, navigate to All Assignment Types dropdown window and select **Field Evaluation**. This will allow you to see all Tech Tasks that are currently assigned to you.

1. Click on **Request Observation** button above the selected task title.
2. In the opened-up window with evaluator names, click on **My Region** to see the available evaluators in your area.
3. Hover over the evaluator name to select it and click **Send**.
4. You are finished! You can now log out of the LMS.

Note: *Scheduling of an evaluation (date, place, and time) occurs outside of the LMS.*


Workday Learning

Purpose: All TC Energy employees and contractors are required to complete training within Workday. This section covers how to access Workday Learning, how to view assigned learning, how to enroll in a scheduled offering, and more.

Setting Up Your Access

1. Open the URL on your desktop/laptop: <https://wd3.myworkday.com/tcenergy/login.html>
2. Select the second option '**Excluded Contractors**'
3. Enter the username and temporary password sent to you via e-mail upon engagement.
4. You will be prompted to change your password. Enter the temporary password in the Old Password field and create a new password.
5. You will be asked to setup "Extra Verification" (i.e., Two-factor Authentication). Click **Set Up Now**.

Note: You may sign in 3 times before you are required to set up extra verification. If you wish to proceed and set up extra verification later, click **Maybe Later**.

6. A QR Code will be displayed on your screen. **Do not exit this page or click next.**
7. On another personal mobile device, go to the App Store (for Apple Device) or Google Play Store (for Android Device) and download **Microsoft Authenticator app**. 

Note: You must continue using the personal device you chose to download the Microsoft Authenticator app to sign into Workday moving forward.

8. Click **+** located at the top right-hand corner.
9. Select **Work or School Account**.
10. Click **Scan QR Code** and point back camera towards the QR code displayed on your screen. You will see TC Energy Workday and a six-digit code.
11. Go back to your desktop/laptop and click **Next** on the Workday website. Enter the 6-digit security code generated in the app.
12. Click **Next** and **Done**. You have now successfully set up the Authenticator App connection.

Access and Navigation

Once you have successfully set up your Two-factor Authentication, you will be required to log in using your username, password, and auto-generated six-digit security code moving forward.

1. Open the URL: <https://wd3.myworkday.com/tcenergy/login.html>
2. Select the second option '**Excluded Contractors**'
3. Enter your username and password. Click **Sign In**.

4. Open the Authenticator App on your personal device and enter the six-digit security code. Click **Submit**.

Two-Factor Authentication and Password Reset

If you have changed your personal device that has the Authenticator app, you will be required to reset and reinstall the app on your new device. Contact the Service Desk at Canada/U.S.: 1.888.546.3484 | Mexico +525511002991 to have your Two-factor Authentication reset or if you require other assistance with your login credentials.

View Assigned Learning

1. Go to **Learning Home** tab.
2. Refer to courses under **Required for You** section.

Note: Courses appear in ascending order of days remaining to complete training.

3. For digital course, click **Enroll** or **Start**.
4. For programs, click **Start Program** and then **Submit**. For detailed instructions, refer to [How to Launch Program](#).
5. For blended course, ensure you enroll into scheduled offering. Refer to [How to Enroll in Scheduled Offering](#) for instructions.

View Unassigned Learning

1. Go to **Learning Home** tab.
2. Click on **CR LRN My Upcoming Learning** link.

How to Select an Equivalent Offering

You can choose to complete an equivalent option for a course, if available, by going to 'View Equivalencies'. If a course has been assigned to you, you can opt to complete an equivalent course. This can include completing in a different language or equivalent course option.

1. Locate and open course in Learning Worklet.
2. Click **View Equivalencies**.

Note: This option will only appear if there are alternative options offered for course.

3. Select one of the available options by clicking **View Course**.
4. Click **Start Course**.

How to Launch Program

1. Go to **Learning Home** tab.
2. Select program.

3. Click **Start Program**.
4. Click **Submit** then **Done**.
5. Navigate to first course listed in program.
6. Click **Item Details** and then **Start Course**.
7. Once course has been completed, checkmark icon will appear beside course name and image in program overview.

Note: If you have previously completed the courses, the content contained in program may appear individually in the Required for You section. Completing the individual course in the Required for You section or through the program will grant you completion in both instances.

How to Enroll in a Scheduled Offering

1. Go to **My Learning** tab.
2. Select course and click **Select Offering**.
3. Select an available offering.

Note: The location shown for each offering may not reflect the exact place of training. Select offering and click **OK** to view detailed location of training.

4. Confirm offering details and review additional comments.

Note: An alert message may appear informing you that the offering is outside your primary work location.

5. Click **Submit**.

Note: You cannot register for another offering for the same course until previous enrollment has been dropped. If unable to attend, ensure to drop enrollment and re-enroll in another offering.

6. Click **Done** to return to course page.
7. Click **Add to Calendar** to download an ICS file to your Outlook.

Note: Any changes to the offering will NOT be automatically updated in Outlook. For the latest scheduled offering information, always refer to Workday.

How to Drop Enrollment

For a **digital** course, you can drop enrollment if course needs to be reset due to technical issue.

For a **blended** course, you can drop enrollment if you can no longer attend an offering you have registered in.

Note: If a course is required for you, this action will only reset your digital course or unenroll you from an offering. The course will not be dropped from your Learning Worklet.

Drop Enrollment in a Digital Course

1. Locate and open course in Learning Worklet.

2. Click **Drop Course**.

Note: This option will only appear if you have previously started the course.

3. Select drop reason.
4. Click **OK** and then **Submit**.

Note: An alert message will appear if course is a requirement. Read alert before clicking **Submit**.

5. If course is self-assigned, course will drop from your Learning Worklet.

Drop Enrollment in a Blended Course

1. Locate and open course in Learning Worklet.
2. Click **Drop Course**.
3. Select drop reason.
4. Click **OK** and then **Submit**.

Note: An alert message will appear if course is a requirement. Read alert before clicking **Submit**.

5. Click **Done**.
6. Delete related Outlook calendar invite.

Note: Ensure to enroll into another scheduled offering if course is required for you.

Access Your Learning Certificates

Once you have completed a course, you can obtain a learning certificate to produce proof of completion or to save for your records.

1. Under Links, click the language you want your certificate to appear in.
2. Type title of course you have completed in Learning Content Detail field.

Note: If you want certificates for all completed courses, leave this field blank.

3. Ensure your name is populated in Worker field.
4. Click **OK**.
5. Confirm record details and click **Print**.
6. Click **Notify Me Later**.
7. Go to bell notification icon and locate notification titled 'Document Available' for a PDF copy of your certificate.
8. Download or print document as required.

View Transcript

View your learning transcript for a snapshot on your historical completions or to view courses you have not started or in progress.

1. Go to **My Learning** tab.
2. Click **View Learning Transcript**.
3. To export to Excel, click spreadsheet icon located at the top right corner of table.

Need Assistance?

If you require assistance with SuccessFactors Learning or Workday Learning, please contact the Service Desk at Canada/U.S.: 1.888.546.3484 | Mexico +525511002991.

Service providers may submit completion records for inspectors to the TCE Learning inbox (TCE_Learning@tcenergy.com).