

THR80

SAP SuccessFactors Platform Introduction Academy

COURSE OUTLINE

Course Version: 2205

Course Duration:

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation



Demonstration



Procedure



Warning or Caution



Hint



Related or Additional Information



Facilitated Discussion



User interface control

Example text

Window title

Example text

Contents

vii Course Overview

1 Unit 1: SAP SuccessFactors: Platform Introduction Academy Overview

- 1 Lesson: Course Overview
- 1 Lesson: Handling Customer Projects
- 1 Lesson: Navigating in the SAP SuccessFactors Platform

3 Unit 2: SAP SuccessFactors: Systems

- 3 Lesson: Configuring SAP SuccessFactors
- 3 Lesson: Getting Started with Administration

5 Unit 3: SAP SuccessFactors: Permissions

- 5 Lesson: Managing Security Using SAP SuccessFactors Role Based Permissions (RBP)
- 5 Lesson: Managing Proxies

7 Unit 4: SAP SuccessFactors: Basic Configurations

- 7 Lesson: Customizing the SAP SuccessFactors Instance
- 7 Lesson: Customizing the Home Page
- 7 Lesson: Managing Company Settings, Passwords, and Texts
- 7 Lesson: Managing Mobile Settings
- 8 Lesson: Managing User Data
- 8 Lesson: Setting Up E-mail Notifications

9 Unit 5: SAP SuccessFactors: Employee Files

- 9 Lesson: Configuring SAP SuccessFactors with XML Files
- 9 Lesson: Configuring People Profile
- 9 Lesson: Managing Picklists

11 Unit 6: SAP SuccessFactors: Metadata Framework

- 11 Lesson: Defining Metadata Framework (MDF) Objects
- 11 Lesson: MDF Object Configuration
- 11 Lesson: Creating and Triggering Business Rules
- 11 Lesson: Workflow and Managing Data for MDF Objects
- 11 Lesson: Managing the Profile with the Business Configuration Tool and MDF Blocks

13	Unit 7:	SAP SuccessFactors: Configuration Management
13		Lesson: Validating the Configuration
13		Lesson: Using Configuration Center
13		Lesson: Implementing Translations
15	Unit 8:	SAP SuccessFactors: People Analytics
15		Lesson: Understanding Reporting Solutions
15		Lesson: Administering Report Center
15		Lesson: Using Report Center
17	Unit 9:	SAP SuccessFactors: Release Management & Important Resources
17		Lesson: Important Resources
17		Lesson: Release Updates and What's New Viewer
17		Lesson: Upgrade Center

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant

UNIT 1

SAP SuccessFactors: Platform Introduction Academy Overview

Lesson 1: Course Overview

Lesson Objectives

After completing this lesson, you will be able to:

- Download the Course Files
- Log in to an SAP SuccessFactors instance
- Access the SAP Help Portal

Lesson 2: Handling Customer Projects

Lesson Objectives

After completing this lesson, you will be able to:

- Identify different roles during implementation projects
- Manage configuration projects using best practices

Lesson 3: Navigating in the SAP SuccessFactors Platform

Lesson Objectives

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Platform Architecture
- Access the Administration Center
- Modify People Search and Action Search
- Navigate in the Application with the Quick Cards

Lesson 1: Configuring SAP SuccessFactors

Lesson Objectives

After completing this lesson, you will be able to:

- Access an Instance
- Access Provisioning
- Control access to instances and Provisioning
- Configure changes in Provisioning that will be reflected in the instance
- Describe the Home Page

Lesson 2: Getting Started with Administration

Lesson Objectives

After completing this lesson, you will be able to:

- Identify Administrator Tasks
- Troubleshoot User Login Issues
- Ensure that consultants and customers use the same SAP SuccessFactors common terms

Lesson 1: Managing Security Using SAP SuccessFactors Role Based Permissions (RBP)

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Security with SAP SuccessFactors Role-based Permissions (RBP)
- Create Permission Groups
- Create Permission Roles
- Verify the roles that grant a permission with User Role Search

Lesson 2: Managing Proxies

Lesson Objectives

After completing this lesson, you will be able to:

- Act as a proxy in SAP SuccessFactors
- Assign and remove Proxies

Lesson 1: Customizing the SAP SuccessFactors Instance

Lesson Objectives

After completing this lesson, you will be able to:

- Customize the SAP SuccessFactors application themes
- Set up a Company Logo
- Customize Resources, Help, and Tutorials
- Customize the system navigation and grant permissions

Lesson 2: Customizing the Home Page

Lesson Objectives

After completing this lesson, you will be able to:

- Customize the Home Page

Lesson 3: Managing Company Settings, Passwords, and Texts

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Company Settings in Provisioning
- Create a new admin user from Provisioning
- Manage Company System Settings in Admin Center
- Configure the V12 Org Chart
- Modify password and login policy settings
- Replace system text with Text Replacement
- Replace System Text with Manage Languages (3-Tier)
- Update Company Dictionary
- Modify Legal Scan Library

Lesson 4: Managing Mobile Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Enable Mobile Functionality
- Manage Mobile Settings
- Add Mobile Users

Lesson 5: Managing User Data

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Employee Import
- Manage the User Data File (UDF)

Lesson 6: Setting Up E-mail Notifications

Lesson Objectives

After completing this lesson, you will be able to:

- Make changes to e-mail templates
- Differentiate event-triggered versus administrator-triggered notifications

Lesson 1: Configuring SAP SuccessFactors with XML Files

Lesson Objectives

After completing this lesson, you will be able to:

- Modify the Extensible Markup Language (XML) files
- Validate the Extensible Markup Language (XML) file with a Document Type Definition (DTD) file
- Verify that the Extensible Markup Language (XML) file is well-formed
- Define the key Extensible Markup Language (XML) terms
- Configure the Succession Data Model to Make Changes in SAP SuccessFactors
- Import and Export the Succession Data Model XML in Provisioning
- Download the Succession Data Model from Admin Center
- Navigate in the Different Elements of the Succession Data Model

Lesson 2: Configuring People Profile

Lesson Objectives

After completing this lesson, you will be able to:

- Configure People Profile
- Configure standard elements in People Profile
- Configure custom fields and filtering
- Configure the People Profile Layout
- Configure the People Profile Header Settings
- Hide or show the profile photo and permission it
- Upload a Photo in People Profile
- Run Batch Upload and Batch Export Process
- Configure the Badges Block
- Add deep links to People Profile Blocks

Lesson 3: Managing Picklists

Lesson Objectives

After completing this lesson, you will be able to:

- Manage picklists in SAP SuccessFactors

Lesson 1: Defining Metadata Framework (MDF) Objects

Lesson Objectives

After completing this lesson, you will be able to:

- Create Metadata Framework (MDF) objects
- Activate and permission MDF

Lesson 2: MDF Object Configuration

Lesson Objectives

After completing this lesson, you will be able to:

- Configure options for MDF objects

Lesson 3: Creating and Triggering Business Rules

Lesson Objectives

After completing this lesson, you will be able to:

- Create Business Rules using the Rules Engine
- Identify Use Cases for Configuring Business Rules using the Rules Engine
- Triggering Rules

Lesson 4: Workflow and Managing Data for MDF Objects

Lesson Objectives

After completing this lesson, you will be able to:

- Describe workflows for MDF objects
- Create and Manage data for MDF Objects
- Import and export data for MDF objects

Lesson 5: Managing the Profile with the Business Configuration Tool and MDF Blocks

Lesson Objectives

After completing this lesson, you will be able to:

- Modify the profile with Business Configuration UI (BCUI)
- Add permissions for BCUI
- Update the Succession Data Model with BCUI
- Customize People Profile with MDF blocks

Lesson 1: Validating the Configuration

Lesson Objectives

After completing this lesson, you will be able to:

- Verify that the configuration does not contain issues with the Configuration Check Tool

Lesson 2: Using Configuration Center

Lesson Objectives

After completing this lesson, you will be able to:

- Use Configuration Center
- Activate Configuration Center prerequisites
- View the Configuration
- Download the Configuration
- Configure options in the Configuration Center

Lesson 3: Implementing Translations

Lesson Objectives

After completing this lesson, you will be able to:

- Implement translations to configuration labels
- Collect requirements in the Translation Workbook
- Set up languages in Provisioning
- Configure the Succession Data Model XML file in the context of translations
- Implement translations in People Profile

Lesson 1: Understanding Reporting Solutions

Lesson Objectives

After completing this lesson, you will be able to:

- Explain reports with the self-service reporting solutions
- Explain reports with the custom reporting solutions
- Run Usage Analytics reports

Lesson 2: Administering Report Center

Lesson Objectives

After completing this lesson, you will be able to:

- Perform administration tasks for the Report Center
- Manage reports with Report Center

Lesson 3: Using Report Center

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate in the Report Center
- Customize the time zone for date field in the reports

UNIT 9

SAP SuccessFactors: Release Management & Important Resources

Lesson 1: Important Resources

Lesson Objectives

After completing this lesson, you will be able to:

- Describe available resources
- Access the resources available for SAP Cloud Identity Authentication Service (IAS)

Lesson 2: Release Updates and What's New Viewer

Lesson Objectives

After completing this lesson, you will be able to:

- Stay current with the SAP SuccessFactors solutions
- Maintain knowledge with the release updates via the What's New Viewer

Lesson 3: Upgrade Center

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate within the Upgrade Center