HR800

SAP SuccessFactors Platform Administration

COURSE OUTLINE

Course Version: 2311
Course Duration:

SAP Copyrights, Trademarks and Disclaimers

© 2023 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. Please see https://www.sap.com/corporate/en/legal/copyright.html for additional trademark information and notices.

Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors.

National product specifications may vary.

These materials may have been machine translated and may contain grammatical errors or inaccuracies.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP SE or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP SE or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions.

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*

© Copyright. All rights reserved.

Contents

vii	Course Overview	
1	Unit 1:	Introducing the Course
1		Lesson: Introducing the Course
3	Unit 2:	Exploring Administrator Basics
3		Lesson: Identifying Administrator Tasks
3		Lesson: Navigating and Accessing Tools and Support in SAP SuccessFactors
3		Lesson: Navigating and Accessing Tools in Admin Center
3		Lesson: Communicating with Users
4		Lesson: Troubleshooting User Login Issues
5	Unit 3:	Performing Customization
5		Lesson: Customizing Themes
5		Lesson: Managing Home Page
5		Lesson: Setting a Company Logo
7	Unit 4:	Enabling Accessibility
7		Lesson: Exploring Accessibility Options in SAP SuccessFactors
9	Unit 5:	Building the Metadata Framework (MDF)
9		Lesson: Describing the Metadata Framework
9		Lesson: Configuring MDF Objects
9		Lesson: Describing Business Rules
11	Unit 6:	Working with Employee Files, Employee Import and Picklists
11		Lesson: Working with Employee Files and People Profiles
11		Lesson: Using Business Configuration UI to Manage Employee Files
11		Lesson: Importing User Data
11		Lesson: Using Picklists
13	Unit 7:	Configuring Company and Platform Settings
13		Lesson: Managing Company System and Platform Feature Settings
13		Lesson: Configuring the Org Chart
13		Lesson: Modifying Password and Login Policy Settings
13		Lesson: Customizing the System Language
15	Unit 8:	Exploring Mobile Settings
15		Lesson: Managing Mobile Settings

© Copyright. All rights reserved.

17	**Unit 9:**	**Using Proxy**
17		Lesson: Using Proxy in SAP SuccessFactors
17		Lesson: Assigning and Removing Proxies
19	**Unit 10:**	**Managing Role-Based Permissions**
19		Lesson: Describing Role-Based Permission
19		Lesson: Managing Role-Based Permission Access
19		Lesson: Describing Basic Roles
19		Lesson: Creating Permission Groups
19		Lesson: Creating Permission Roles
20		Lesson: Granting the Permission Role to the Group
20		Lesson: Using User Role Search
21	**Unit 11:**	**Managing Competencies and Job Roles with the Legacy System or Job Profile Builder**
21		Lesson: Managing Competencies and Competency Libraries with Job Description Manager (JDM or JDM 1.0)
21		Lesson: Managing Job Families and Job Roles with Job Description Manager (JDM or JDM 1.0)
21		Lesson: Migrating from Job Description Manager (JDM or JDM 1.0) to Job Profile Builder (JPB or JDM 2.0)
21		Lesson: Using the Job Profile Builder (JPB or JDM 2.0) and the Center of Capabilities
23	**Unit 12:**	**Exploring the Opportunity Marketplace**
23		Lesson: Describing the Opportunity Marketplace
23		Lesson: Explaining Prerequisite, Dependencies and Permissions
23		Lesson: Using the Opportunity Marketplace as an End User
25	**Unit 13:**	**Using Useful Admin Tools**
25		Lesson: Performing Action Searches and Custom Navigations
25		Lesson: Using the Check Tool
25		Lesson: Provisioning Access Management
27	**Unit 14:**	**Working with the Configuration Transport Center, Instance Sync and Instance Refresh**
27		Lesson: Working in the Configuration Transport Center
27		Lesson: Performing an Instance Sync
27		Lesson: Setting Instance Sync Permissions
27		Lesson: Exploring the Integration Center
27		Lesson: Using the Instance Refresh Tool

© Copyright. All rights reserved.

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- System Architect

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 1 Introducing the Course

Lesson 1: Introducing the Course

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the general information about the course

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 2 Exploring Administrator Basics

Lesson 1: Identifying Administrator Tasks

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the roles and responsibilities of a typical SAP SuccessFactors system administrator
- Identify and define common terms specific to SAP SuccessFactors

Lesson 2: Navigating and Accessing Tools and Support in SAP SuccessFactors

Lesson Objectives

After completing this lesson, you will be able to:

- Log in to SAP SuccessFactors
- Describe the SAP SuccessFactors Home Page
- Access Admin Center

Lesson 3: Navigating and Accessing Tools in Admin Center

Lesson Objectives

After completing this lesson, you will be able to:

- Access Admin Center
- Identify the features of the new version of Admin Center (Next Gen Admin)

Lesson 4: Communicating with Users

Lesson Objectives

After completing this lesson, you will be able to:

- Identify and differentiate event-triggered versus administrator-triggered notifications
- Enable and disable Email Notification Templates
- Update the email notification message bodies
- Change User Notification Email Options

© Copyright. All rights reserved.

- Use the Send User Welcome Email to send system notifications

Lesson 5: Troubleshooting User Login Issues

Lesson Objectives

After completing this lesson, you will be able to:

- Reset user passwords
- Reset locked user accounts

© Copyright. All rights reserved.

UNIT 3 Performing Customization

Lesson 1: Customizing Themes

Lesson Objectives

After completing this lesson, you will be able to:

- Create, edit, and modify themes
- Apply and set the default theme
- Delete a theme

Lesson 2: Managing Home Page

Lesson Objectives

After completing this lesson, you will be able to:

- Define the Home Page
- Distinguish the two UI versions
- List the steps to migrate from the legacy to the new home page
- Activate or deactivate quick actions
- Add custom links to the Favorites quick action
- Add and edit custom cards

Lesson 3: Setting a Company Logo

Lesson Objectives

After completing this lesson, you will be able to:

- Upload your company logo
- Point to a logo on a URL

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 4 Enabling Accessibility

Lesson 1: Exploring Accessibility Options in SAP SuccessFactors

Lesson Objectives

After completing this lesson, you will be able to:

- Enable accessibility options in the SAP SuccessFactors HXM Suite
- Apply greater color contrast in the user interface with High Contrast Theme options
- Convey information with Screen Readers
- Navigate the software with keyboard shortcuts

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 5 Building the Metadata Framework (MDF)

Lesson 1: Describing the Metadata Framework

Lesson Objectives

After completing this lesson, you will be able to:

- Define Metadata Framework
- Activate and permission Metadata Framework

Lesson 2: Configuring MDF Objects

Lesson Objectives

After completing this lesson, you will be able to:

- Configure Options for MDF objects

Lesson 3: Describing Business Rules

Lesson Objectives

After completing this lesson, you will be able to:

- Define Business Rules

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 6 Working with Employee Files, Employee Import and Picklists

Lesson 1: Working with Employee Files and People Profiles

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the various elements in SAP SuccessFactors People Profile page
- Explain the configuration process for People Profile
- Describe and configure the People Profile header settings

Lesson 2: Using Business Configuration UI to Manage Employee Files

Lesson Objectives

After completing this lesson, you will be able to:

- Define and describe the features and limitations of the Business Configuration UI
- Enable the Business Configuration UI and set up admin permissions

Lesson 3: Importing User Data

Lesson Objectives

After completing this lesson, you will be able to:

- Import User data

Lesson 4: Using Picklists

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Picklists in SAP SuccessFactors
- Modify and create new picklists

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 7 Configuring Company and Platform Settings

Lesson 1: Managing Company System and Platform Feature Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Describe and define commonly used company system settings
- Update company system settings
- Locate Platform Feature Settings permission
- Locate the Tenant Preferred Time Zone in Platform Feature Settings

Lesson 2: Configuring the Org Chart

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Org Chart

Lesson 3: Modifying Password and Login Policy Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Adjust password policy settings
- Control the log in features and assistance available

Lesson 4: Customizing the System Language

Lesson Objectives

After completing this lesson, you will be able to:

- Replace text within system
- Add, remove, export, and import Company Dictionary
- Modify Legal Scan Library

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 8 Exploring Mobile Settings

Lesson 1: Managing Mobile Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Mobile Settings

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 9 Using Proxy

Lesson 1: Using Proxy in SAP SuccessFactors

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the function and benefits of using proxy
- Identify which areas of SAP SuccessFactors an employee can have access to via proxy
- Determine proxy considerations for the organization

Lesson 2: Assigning and Removing Proxies

Lesson Objectives

After completing this lesson, you will be able to:

- Assign and remove proxies using Proxy Management
- Assign and remove proxies using Proxy Import
- Assign and remove proxies using Settings

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 10 Managing Role-Based Permissions

Lesson 1: Describing Role-Based Permission

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the purpose and usage of Role-Based Permissions
- Identify the components and features of Role-Based Permissions

Lesson 2: Managing Role-Based Permission Access

Lesson Objectives

After completing this lesson, you will be able to:

- Grant access to Manage Role-Based Permission Access

Lesson 3: Describing Basic Roles

Lesson Objectives

After completing this lesson, you will be able to:

- Describe basic roles within SAP SuccessFactors

Lesson 4: Creating Permission Groups

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the purpose and functionality of Permission Groups
- Create a Permission Group

Lesson 5: Creating Permission Roles

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the functionality and usage of Permission Roles
- Create a Permission Role

© Copyright. All rights reserved.

Lesson 6: Granting the Permission Role to the Group

Lesson Objectives

After completing this lesson, you will be able to:

- Describe how Permission Roles are granted to Permission Groups
- Grant a Permission Role to a Permission Group

Lesson 7: Using User Role Search

Lesson Objectives

After completing this lesson, you will be able to:

- Identify which Permission Role(s) a user or a group of user is assigned to

© Copyright. All rights reserved.

UNIT 11

Managing Competencies and Job Roles with the Legacy System or Job Profile Builder

Lesson 1: Managing Competencies and Competency Libraries with Job Description Manager (JDM or JDM 1.0)

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the concept and the usage of competencies in SAP SuccessFactors
- Identify competency library components

Lesson 2: Managing Job Families and Job Roles with Job Description Manager (JDM or JDM 1.0)

Lesson Objectives

After completing this lesson, you will be able to:

- Create job families
- Create job roles
- Add job codes
- Map competencies to job roles

Lesson 3: Migrating from Job Description Manager (JDM or JDM 1.0) to Job Profile Builder (JPB or JDM 2.0)

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the two options to manage competencies, families and roles
- Describe the migration process from the legacy system to Job Profile Builder

Lesson 4: Using the Job Profile Builder (JPB or JDM 2.0) and the Center of Capabilities

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Job Profile Builder

© Copyright. All rights reserved.

- Describe the Center of Capabilities
- Set up the permissions for Job Profile Builder
- Create Job Profile Content
- Add Job Families and roles
- Map roles with Job Codes and Competencies
- Create and Customize Job Profile Templates
- Create Job Profiles
- Use Job Profile Builder Workflow to Create and Approve Job Profile
- View the Job Profile as an End User from People Profile
- Locate the Competencies from the Center of Capabilities

© Copyright. All rights reserved.

UNIT 12

Exploring the Opportunity Marketplace

Lesson 1: Describing the Opportunity Marketplace

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Opportunity Marketplace
- List the benefits of Opportunity Marketplace

Lesson 2: Explaining Prerequisite, Dependencies and Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Understand that Job Profile Builder is a prerequisite to take advantage of all features
- Understand that Job Description Manager can be used
- Explain the dependencies
- Give the permissions for the Opportunity Marketplace

Lesson 3: Using the Opportunity Marketplace as an End User

Lesson Objectives

After completing this lesson, you will be able to:

- Use the Opportunity Marketplace as an end user
- List the three categories for the item cards

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 13 Using Useful Admin Tools

Lesson 1: Performing Action Searches and Custom Navigations

Lesson Objectives

After completing this lesson, you will be able to:

- Utilize Action Search
- Configure Custom Navigations

Lesson 2: Using the Check Tool

Lesson Objectives

After completing this lesson, you will be able to:

- Define permissions for the Check tool
- Use the Check tool to identify and resolve configuration issues

Lesson 3: Provisioning Access Management

Lesson Objectives

After completing this lesson, you will be able to:

- View and control who has provisioning access to your instance(s)

© Copyright. All rights reserved.

© Copyright. All rights reserved.

UNIT 14

Working with the Configuration Transport Center, Instance Sync and Instance Refresh

Lesson 1: Working in the Configuration Transport Center

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Configuration Transport Center
- Define the prerequisites for the Configuration Transport Center
- Download SAP SuccessFactors Application Configurations using the Configuration Transport Center
- Identify other options in the Configuration Transport Center

Lesson 2: Performing an Instance Sync

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Instance Sync

Lesson 3: Setting Instance Sync Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Grant/Revoke Permissions for Instance Sync

Lesson 4: Exploring the Integration Center

Lesson Objectives

After completing this lesson, you will be able to:

- Provide a better understanding of Integration Center

Lesson 5: Using the Instance Refresh Tool

Lesson Objectives

After completing this lesson, you will be able to:

- Provide a better understanding the Instance Refresh tool

© Copyright. All rights reserved.