

THR80

SAP SuccessFactors Platform Introduction Academy

COURSE OUTLINE

Course Version: 2211

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	<i>Example text</i>
Window title	<i>Example text</i>

Contents

vii Course Overview

1 Unit 1: Introducing SAP SuccessFactors Platform

- 1 Lesson: Accessing the SAP SuccessFactors instance
- 1 Lesson: Handling Customer Projects
- 1 Lesson: Navigating in the SAP SuccessFactors Platform

3 Unit 2: Setting up SAP SuccessFactors systems

- 3 Lesson: Performing configuration in SAP SuccessFactors
- 3 Lesson: Getting started with administration

5 Unit 3: Configuring and assigning permissions in SAP SuccessFactors

- 5 Lesson: Managing security using SAP SuccessFactors Role Based Permissions (RBP)
- 5 Lesson: Using Proxy Management

7 Unit 4: Managing basic configurations in SAP SuccessFactors

- 7 Lesson: Customizing the SAP SuccessFactors instance
- 7 Lesson: Customizing the Home Page
- 7 Lesson: Managing Mobile Settings
- 7 Lesson: Managing the User Data File
- 7 Lesson: Implementing email notifications

9 Unit 5: Configuring employee files in SAP SuccessFactors

- 9 Lesson: Configuring SAP SuccessFactors with XML Files
- 9 Lesson: Configuring the People Profile
- 9 Lesson: Managing picklists in the Picklist Center

11 Unit 6: Defining the Metadata Framework in SAP SuccessFactors

- 11 Lesson: Defining Metadata Framework (MDF) objects
- 11 Lesson: Configuring MDF objects
- 11 Lesson: Creating and triggering Business Rules
- 11 Lesson: Copying Configuration and Non-User Transactional MDF Data
- 11 Lesson: Managing the Succession Data Mode with the Business Configuration Tool and MDF Blocks

13 Unit 7: Managing configuration in SAP SuccessFactors

- 13 Lesson: Validating the Configuration
- 13 Lesson: Using Configuration Center
- 13 Lesson: Managing Company Settings, Passwords, and Texts
- 14 Lesson: Implementing translations

15 Unit 8: Using People Analytics in SAP SuccessFactors

- 15 Lesson: Understanding Reporting Solutions
- 15 Lesson: Administering Report Center
- 15 Lesson: Using Report Center

17 Unit 9: Explaining release management & resources in SAP SuccessFactors

- 17 Lesson: Accessing important resources
- 17 Lesson: Understanding release updates and the What's New Viewer
- 17 Lesson: Using the Upgrade Center

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant

Lesson 1: Accessing the SAP SuccessFactors instance

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: Performing configuration in 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
- Describe SAP SuccessFactors permission roles
- Verify the roles that grant a permission with User Role Search

Lesson 2: Using Proxy Management

Lesson Objectives

After completing this lesson, you will be able to:

- Act as a proxy in SAP SuccessFactors
- Use Proxy tools to 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
- Use the Edit function on Resources, Help, and Tutorials
- Maintain Custom Navigations

Lesson 2: Customizing the Home Page

Lesson Objectives

After completing this lesson, you will be able to:

- Use Manage Home Page feature to customize the Home page

Lesson 3: Managing Mobile Settings

Lesson Objectives

After completing this lesson, you will be able to:

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

Lesson 4: Managing the User Data File

Lesson Objectives

After completing this lesson, you will be able to:

- Access required permissions to import employees
- Maintain user data with the User Data File and Admin Center

Lesson 5: Implementing email notifications

Lesson Objectives

After completing this lesson, you will be able to:

- Make changes to e-mail templates
- Manage communications in SAP SuccessFactors with triggered e-mail 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 the People Profile

Lesson Objectives

After completing this lesson, you will be able to:

- Use Admin Center and Succession Data Model to configure People Profile
- Configure standard elements in People Profile
- Maintain custom fields and filters
- Manage the People Profile using the Configure People Profile tool
- Maintain the People Profile using Header Settings
- Hide, show, and upload a photo into People Profile
- Run Batch Upload and Batch Export processes
- Use Manage Badges to create custom badges
- Add deep links to People Profile Blocks

Lesson 3: Managing picklists in the Picklist Center

Lesson Objectives

After completing this lesson, you will be able to:

- Maintain picklists using the Picklist Center

Lesson 1: Defining Metadata Framework (MDF) objects

Lesson Objectives

After completing this lesson, you will be able to:

- Understand the Metadata Framework to maintain (MDF) objects
- Enable MDF and assign permissions for access

Lesson 2: Configuring MDF objects

Lesson Objectives

After completing this lesson, you will be able to:

- Describe options for configuring 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
- Define when rules are triggered

Lesson 4: Copying Configuration and Non-User Transactional MDF Data

Lesson Objectives

After completing this lesson, you will be able to:

- Use Copy for Configuration and Non-User Transactional MDF Data

Lesson 5: Managing the Succession Data Mode 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 is valid using the Configuration Check Tool

Lesson 2: Using Configuration Center

Lesson Objectives

After completing this lesson, you will be able to:

- Describe uses for Configuration Center
- Activate Configuration Center prerequisites
- View different configuration types in Configuration Center
- Select configurations to download in Configuration Center
- Consider transportation options in Configuration Center

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 the Admin Center
- Configure Org Chart settings using Org Chart Configuration
- 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: 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 for translations
- Implement translations in People Profile

Lesson 1: Understanding Reporting Solutions

Lesson Objectives

After completing this lesson, you will be able to:

- Explain reports in the self-service reporting solutions
- Describe reports in the custom reporting solutions

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:

- Utilize navigation tools in the Report Center
- Customize the time zone for date field in the reports

Lesson 1: Accessing important resources

Lesson Objectives

After completing this lesson, you will be able to:

- Access available resources to support SAP SuccessFactors solutions
- Connect to SAP solutions using SAP Cloud Identity Authentication Service (IAS)

Lesson 2: Understanding release updates and the 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: Using the Upgrade Center

Lesson Objectives

After completing this lesson, you will be able to:

- Use navigation tools to access the Upgrade Center