THR80
SAP SuccessFactors Platform
Introduction Academy

COURSE OUTLINE

Course Version: 2111
Course Duration:
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American English is the standard used in this handbook. The following typographic conventions are also used.

<table>
<thead>
<tr>
<th>Typographic Convention</th>
<th>Example Text</th>
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<tr>
<td>This information is displayed in the instructor’s presentation</td>
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<td>Demonstration</td>
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<td>Procedure</td>
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<td>Warning or Caution</td>
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<td>Hint</td>
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<td>Related or Additional Information</td>
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<td>Facilitated Discussion</td>
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<td>User interface control</td>
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<td>Window title</td>
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</tbody>
</table>
## Course Overview

<table>
<thead>
<tr>
<th>Unit 1: SAP SuccessFactors: Platform Introduction Academy Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson: Course Overview</td>
</tr>
<tr>
<td>Lesson: Handling Customer Projects</td>
</tr>
<tr>
<td>Lesson: Navigating in the SAP SuccessFactors Platform</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 2: SAP SuccessFactors: Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson: Configuring SAP SuccessFactors</td>
</tr>
<tr>
<td>Lesson: Getting Started with Administration</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 3: SAP SuccessFactors: Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson: Managing Security Using SAP SuccessFactors Role Based Permissions (RBP)</td>
</tr>
<tr>
<td>Lesson: Managing Proxies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 4: SAP SuccessFactors: Basic Configurations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson: Customizing the SAP SuccessFactors Instance</td>
</tr>
<tr>
<td>Lesson: Customizing the Home Page</td>
</tr>
<tr>
<td>Lesson: Managing Company Settings, Passwords, and Texts</td>
</tr>
<tr>
<td>Lesson: Managing Mobile Settings</td>
</tr>
<tr>
<td>Lesson: Managing User Data</td>
</tr>
<tr>
<td>Lesson: Setting Up E-mail Notifications</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 5: SAP SuccessFactors: Employee Files</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson: Configuring SAP SuccessFactors with XML Files</td>
</tr>
<tr>
<td>Lesson: Configuring People Profile</td>
</tr>
<tr>
<td>Lesson: Managing Picklists</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 6: SAP SuccessFactors: Metadata Framework</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson: Defining Metadata Framework (MDF) Objects</td>
</tr>
<tr>
<td>Lesson: MDF Object Configuration</td>
</tr>
<tr>
<td>Lesson: Creating and Triggering Business Rules</td>
</tr>
<tr>
<td>Lesson: Workflow and Managing Data for MDF Objects</td>
</tr>
<tr>
<td>Lesson: Managing the Profile with the Business Configuration Tool and MDF Blocks</td>
</tr>
<tr>
<td>Unit 7:</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td>13</td>
</tr>
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</tr>
<tr>
<td>13</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 8:</th>
<th>SAP SuccessFactors: People Analytics</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Lesson: Understanding Reporting Solutions</td>
</tr>
<tr>
<td>15</td>
<td>Lesson: Administering Report Center</td>
</tr>
<tr>
<td>15</td>
<td>Lesson: Using Report Center</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 9:</th>
<th>SAP SuccessFactors: Release Management &amp; Important Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>Lesson: Important Resources</td>
</tr>
<tr>
<td>17</td>
<td>Lesson: Release Updates and What’s New Viewer</td>
</tr>
<tr>
<td>17</td>
<td>Lesson: Upgrade Center</td>
</tr>
</tbody>
</table>
TARGET AUDIENCE
This course is intended for the following audiences:

- Application Consultant
Lesson 1: Course Overview

Lesson Objectives
After completing this lesson, you will be able to:

- 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 a permission group
- 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 the Configuration Center

Lesson Objectives
After completing this lesson, you will be able to:

• Use the 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
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