THR80
SAP SuccessFactors Platform
Introduction Academy

COURSE OUTLINE

Course Version: 2011
Course Duration:
SAP Copyrights, Trademarks and Disclaimers

© 2020 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 http://global12.sap.com/corporate-en/legal/copyright/index.epx 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.
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
- Window title

*Example text*
# Contents

<table>
<thead>
<tr>
<th>Unit</th>
<th>Course Overview</th>
<th>SAP SuccessFactors HXM - Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Lesson: Getting Started with SAP SuccessFactors HXM</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Lesson: Configuring SAP SuccessFactors: Instance and Provisioning Access Management</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Lesson: Navigating and Accessing Tools and Support in SAP SuccessFactors</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Lesson: Administrator Basics</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Unit</th>
<th>SAP SuccessFactors HXM - Basic Configurations</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Lesson: Customizing the SAP SuccessFactors Instance</td>
</tr>
<tr>
<td>5</td>
<td>Lesson: Managing Company Settings and Texts</td>
</tr>
<tr>
<td>5</td>
<td>Lesson: Managing Mobile Settings</td>
</tr>
<tr>
<td>5</td>
<td>Lesson: Managing User Data</td>
</tr>
<tr>
<td>6</td>
<td>Lesson: Email Notifications</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>SAP SuccessFactors HXM - Employee Files</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Lesson: Using XML in SAP SuccessFactors</td>
</tr>
<tr>
<td>7</td>
<td>Lesson: Configuring People Profile</td>
</tr>
<tr>
<td>7</td>
<td>Lesson: Picklists</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>SAP SuccessFactors HXM - Metadata Framework</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Lesson: MDF Overview</td>
</tr>
<tr>
<td>9</td>
<td>Lesson: MDF Object Configuration</td>
</tr>
<tr>
<td>9</td>
<td>Lesson: Business Rules</td>
</tr>
<tr>
<td>9</td>
<td>Lesson: Manage Business Configuration Tool and MDF Blocks in the Profile</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>SAP SuccessFactors HXM - Instance Sync and Configuration Check Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Lesson: Instance Sync</td>
</tr>
<tr>
<td>11</td>
<td>Lesson: Configuration Check Tool</td>
</tr>
</tbody>
</table>

© Copyright. All rights reserved.
<table>
<thead>
<tr>
<th>13</th>
<th>Unit 7: SAP SuccessFactors HXM - Implement Translations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Lesson: Implement Translations</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>15</th>
<th>Unit 8: SAP SuccessFactors HXM - Introduction to People Analytics</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Lesson: People Analytics Tools Overview</td>
</tr>
<tr>
<td>15</td>
<td>Lesson: Introduction to the Report Center - The Gateway to All the Other Reporting Tools</td>
</tr>
<tr>
<td>15</td>
<td>Lesson: Using Report Center</td>
</tr>
</tbody>
</table>
Course Overview

TARGET AUDIENCE
This course is intended for the following audiences:
UNIT 1

SAP SuccessFactors HXM - Systems

Lesson 1: Getting Started with SAP SuccessFactors HXM

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

● Get started with SAP SuccessFactors HXM and Know Resources Available to You
● Identify the features in the What's New Viewer

Lesson 2: Configuring SAP SuccessFactors: Instance and Provisioning Access Management

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

● Describe an instance
● Describe Provisioning
● Provision Access Management
● Describe how an instance relates to Provisioning

Lesson 3: 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
● Define People and Action Search
● Access the Administration Center

Lesson 4: Administrator Basics

Lesson Objectives
After completing this lesson, you will be able to:
• Identify Administrator Tasks
• Troubleshoot User Login Issues
• Describe SAP Cloud Identity Authentication Service (IAS)
Lesson 1: Managing Security Using SAP SuccessFactors Role Based Permissions (RBP)

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

- Manage User Control in SAP SuccessFactors using Role-Based Permission (RBP)
- Create a permission group
- Create permission roles

Lesson 2: Managing Proxies

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

- Using 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 Themes
- Manage the Home Page
- Set a Company Logo
- Customize Resources, Help, and Tutorials
- Configure custom navigations

Lesson 2: Managing Company Settings and Texts

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

- Manage Company System Settings
- Configure the V12 Org Chart
- Modify Password and Login Policy Settings
- Customize the System Language

Lesson 3: Managing Mobile Settings

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

- Manage mobile settings

Lesson 4: Managing User Data

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

- Manage Employee Import
- Manage the User Data File (UDF)
Lesson 5: Email Notifications

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

• Communicate with Users
Lesson 1: Using XML in SAP SuccessFactors

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

- Describe Extensible Markup Language (XML) and its purpose
- Explain the relationship between Extensible Markup Language (XML) and a Document Type Definition (DTD) file
- Identify the components of well-formed Extensible Markup Language (XML)
- Define the key Extensible Markup Language (XML) terms

Lesson 2: Configuring People Profile

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

- Describe People Profile
- Examine the Configuration Process
- Configure Standard Elements
- Configure Custom Fields and Filtering
- Configure the People Profile Layout

Lesson 3: Picklists

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

- Describe Picklists in SAP SuccessFactors
Lesson 1: MDF Overview
Lesson Objectives
After completing this lesson, you will be able to:

- Define Metadata Framework (MDF)
- 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: Business Rules
Lesson Objectives
After completing this lesson, you will be able to:

- Define Business Rules
- Identify Use Cases for Configuring Business Rules using the Rules Engine

Lesson 4: Manage Business Configuration Tool and MDF Blocks in the Profile
Lesson Objectives
After completing this lesson, you will be able to:

- Define Business Configuration UI
- Activate and permission BCUI
- Use BCUI
- Add Custom MDF blocks in People Profile
Lesson 1: Instance Sync

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

• Explain Instance Sync

Lesson 2: Configuration Check Tool

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

• Understand Configuration Check Tool
Lesson 1: Implement Translations

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

- Describe the translation process
- Collect Requirements in the Translation Workbook
- Set up languages in Provisioning
- XML Template
- Implement translations in People Profile
- Describe the Localization Process
Lesson 1: People Analytics Tools Overview

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

• Identify Self-Service Reporting Tools
• Identify Custom Reporting Tools

Lesson 2: Introduction to the Report Center - The Gateway to All the Other Reporting Tools

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

• Permission Report Center Administrators and Users

Lesson 3: Using Report Center

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

• Describe Functions of Report Center