THR80

SAP SuccessFactors Platform Introduction Academy

COURSE OUTLINE

Course Version: 2311
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*

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Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant

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UNIT 1 Introducing SAP SuccessFactors

Lesson 1: Summarizing the SuccessFactors History and Modules

Lesson Objectives

After completing this lesson, you will be able to:

- Download the Course Files
- Provide a brief history of SAP SuccessFactors
- Provide an Overview of SAP SuccessFactors Modules
- Describe SAP SuccessFactors Platform Architecture

Lesson 2: Accessing Provisioning and Instance

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
- Log into an SAP SuccessFactors instance

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UNIT 2

Setting up SAP SuccessFactors Provisioning

Lesson 1: Accessing the Provisioning area

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Company Settings in Provisioning
- Create a new admin user from Provisioning

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UNIT 3 Describing SuccessFactors Administrator and Admin Center

Lesson 1: 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
- Maintain Superadmin, security admin, and module admins

Lesson 2: Navigating Admin Center, Tiles, and Favorites

Lesson Objectives

After completing this lesson, you will be able to:

- Access the Administration Center

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UNIT 4

Setting up Permissions and system wide features in SAP SuccessFactors

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 3: Managing Company Systems, Logo settings, and Platform Feature Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Company System Settings in the Admin Center

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UNIT 5 Performing Administrator tasks in SAP SuccessFactors

Lesson 1: Using Admin Alerts

Lesson Objectives

After completing this lesson, you will be able to:

- Use Admin Alerts

Lesson 2: Using Check Tool to validate configuration

Lesson Objectives

After completing this lesson, you will be able to:

- Verify that the configuration is valid using the Configuration Check Tool

Lesson 3: Modifying System Access Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Modify password and login policy settings

Lesson 4: Defining Jobs in the Schedule Job Manager

Lesson Objectives

After completing this lesson, you will be able to:

- Work with Schedule Job Manager

Lesson 5: Running the Execution Manager

Lesson Objectives

After completing this lesson, you will be able to:

- Deploy the Execution Manager

Lesson 6: Using the Upgrade Center

Lesson Objectives

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After completing this lesson, you will be able to:

- Use navigation tools to access the Upgrade Center

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UNIT 6 Configuring user experience in SAP SuccessFactors

Lesson 1: Using Action Search, other Searches, and Custom Navigation

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

- Modify People Search and Action Search
- Maintain Custom Navigations

Lesson 2: Using the Org Chart

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

- Configure Org Chart settings using Org Chart Configuration

Lesson 3: Accessing Built-In Support

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

- Use Built in Support

Lesson 4: Customizing the Home Page

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

- Describe the Home Page
- Use Manage Home Page feature to customize the Home page

Lesson 5: Navigating with Quick Cards

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

- Navigate in the Application with the Quick Cards

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Lesson 6: Managing Mobile Settings

Lesson Objectives

After completing this lesson, you will be able to:

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

Lesson 7: Implementing e-mail 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 8: Customizing the SAP SuccessFactors instance

Lesson Objectives

After completing this lesson, you will be able to:

- Customize the SAP SuccessFactors application themes

Lesson 9: Creating Text Replacements

Lesson Objectives

After completing this lesson, you will be able to:

- Replace system text with Text Replacement

Lesson 10: Using the Manage Languages Tool

Lesson Objectives

After completing this lesson, you will be able to:

- Replace System Text with Manage Languages (3-Tier)

Lesson 11: 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

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- Configure the Succession Data Model XML file in for translations
- Implement translations in People Profile

Lesson 12: Customizing Company Dictionary, Spell Check and Legal Scan

Lesson Objectives

After completing this lesson, you will be able to:

- Update Company Dictionary
- Modify Legal Scan Library

Lesson 13: Maintaining the Company Logo

Lesson Objectives

After completing this lesson, you will be able to:

- Set up a Company Logo

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UNIT 7 Configuring People Profile

Lesson 1: Configuring Succession Data Model and Configure People Profile

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
- Use Admin Center and Succession Data Model to configure People Profile
- Configure standard elements in People Profile
- Configure Custom Fields
- 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

Lesson 2: Managing Business Configuration

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Business Configuration

Lesson 3: Maintaining Picklists in the Picklist Center

Lesson Objectives

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After completing this lesson, you will be able to:

- Maintain picklists using the Picklist Center

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

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UNIT 8 Defining MDF and Business Rules

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: Managing the Succession Data Model 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

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UNIT 9 Exploring THR98 topics

Lesson 1: Introducing THR98 Topics

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Succession Data Model Advanced Features
- Explain reports in the self-service reporting solutions
- Describe the Job Description Manager and Job Profile Builder
- Introduce Talent Intelligence Hub in SAP SuccessFactors
- Understand Opportunity Marketplace in SAP SuccessFactors
- Define Dynamic Teams in SAP SuccessFactors
- Explain Configuration Transport Center in SAP SuccessFactors
- Setting up Instance Sync and Instance Refresh in SAP SuccessFactors
- Illustrate Intelligent Services and OData APIs in SAP SuccessFactors
- Appreciate Document Management in SAP SuccessFactors
- Define Data Protection and Privacy in SAP SuccessFactors
- Outline Accessibility in SAP SuccessFactors

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UNIT 10

Explaining release management & resources in SAP SuccessFactors

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)
- Access the SAP Help Portal
- Finding the SAP Help Portal

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

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