SAP SuccessFactors

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Offering Learning to the Extended Enterprise

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Content

Change History

Learn about changes to the documentation for Offering Learning to the Extended Enterprise in recent releases.

1H 2023

Type of Change	Description	More Info
Changed	We updated the entire guide to reflect the current options for Learning-only users, basic access and site access. We also removed information relating to features that are scheduled for deprecation.	

2H 2022

Type of Change	Description	More Info
Changed	We started revisions to reflect the options for Learning-only users.	

1 SAP SuccessFactors Learning in the Extended Enterprise

SAP SuccessFactors Learning allows you to offer the training used by your internal workforce to your extended enterprise.

Your internal workforce consists of employees and contingent workers who have SuccessFactors accounts in both platform and Learning. Your extended enterprise consists of users that have a single account in Learning. These users can be business partners or customers with whom you want to share your Learning content.

There are two access options available for Learning-only users, through a basic access URL or through a site. The following table provides an overview of the supported features for each access option.

> ⚠ Caution
>
> Both options require you to implement Identity Authentication before you can grant access to Learning-only users. If you don't implement Identity Authentication, users can't be authenticated and will get an error when attempting to log in.

Supported Features for Learning-Only Users

Feature / Function	Description	Supported by Basic Access	Supported by Site Access
Approval required before users can access Learning	Users can request access but must be approved to gain access to Learning.	Yes	Yes
Registration codes used for account creation	Users are provided with a code to control who can create an account.	No	Yes
Branding options	Custom branding can be provided through an organization.	Branding limited to custom logo on login page	Yes
Guest library access	Users can browse courses without authenticating.	No	Yes
Conditional authentication rules in Identity Authentication	Users can be grouped and the groups can be leveraged in authentication rules.	Yes	Yes
CAPTCHA authentication on registration forms	Administrators can configure CAPTCHA and enable it for registration forms (*System Administration* > *Configuration* > *System Configuration* > *Web Security*)	Yes	Yes
Internal shopping account	User profile has *Shopping Account Type* value of *Internal*.	Yes	No

Feature / Function	Description	Supported by Basic Access	Supported by Site Access
External shopping account	User profile has *Shopping Account Type* value of *External*.	Yes	Yes

You can configure both methods of access to accommodate the needs of your audiences. Each Learning-only user should use one specific method, either basic access or sites. It's possible for a Learning-only user with an external shopping account type to log in using basic access or a site.

Related Information

How to Integrate SAP SuccessFactors Learning and SAP Cloud Identity Services

2 Shopping Account Types for Learning-Only Users

The *Shopping Account Type* assigned to a Learning-only user is dependent on their access method and the system configuration in SAP SuccessFactors Learning. A Learning-only user's *Shopping Account Type* determines the availability of some features.

There are two access options available for Learning-only users, through a basic access URL or through a site. The *Shopping Account Type* availability and assignment for each method is as follows:

- Basic access - A *Shopping Account Type* of either *Internal* or *External* is assigned during registration. The selection is based on the value defined for `shoppingAccountTypeStudent` in *System Administration* > *Configuration* > *System Configuration* > *FINANCIAL*.
- Site access - A *Shopping Account Type* of *External* is assigned during registration. Learning-only users with access through a site can't have a *Shopping Account Type* of *Internal*.

The following table describes the features available to Learning-only users, based on their *Shopping Account Type*.

Features Available to Learning-Only Users by Shopping Account Type

Feature	Internal	External
Bypass approval process to register for or withdraw from a course	No	Yes
Option to use Prepaid Account or Credit Card payment methods (if configured)	No	Yes
Purchase multiple courses in a single order through a shopping cart/checkout experience	No	Yes
Buy an online course on behalf of another user, including the online portion of a class that is instructor-led with online content	No	Yes
Distribute Charges to Specified Account Codes is honored as a Purchasing Option (if configured)	Yes	No
Use coupons	No	Yes
Use vouchers	Yes*	Yes
External training requests	Yes	No
Course Home experience for browsing, registering, and completing courses.	Yes	Yes*

* Users with a *Shopping Account Type* of *Internal* can use vouchers for online items with the exception of items that require approval.

* The `disableCourseHomeForExternalShoppingAccountType` configuration in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN* controls the Course Home experience for users with the external shopping account type only. The default value of this setting is false, which shows the Course Home experience. This setting is intended to allow customers additional time for testing the Course Home experience for this set of users, and it will only be available until Item Details is deprecated.

Related Information

Vouchers Overview

3 SAP SuccessFactors Learning Basic Access

Implementation consultants or administrators can configure SAP SuccessFactors Learning so that people in the extended enterprise can use a basic URL to access Learning.

People create accounts to become Learning-only users through a basic access URL. You can determine whether they're granted immediate access or whether new accounts require approval from someone in your company. You can also decide whether these Learning-only users have an internal or an external shopping account.

3.1 Basic Access URL for Learning-Only Users

Provide a basic access URL to people in your extended enterprise so they can create a Learning-only user account to access SAP SuccessFactors Learning.

The URL for basic access is a modified version of the standard URL that your internal workforce uses to access Learning. From the basic access URL, the login page displays with introductory text, a login panel, and the option to create a new account. You can choose to display a logo on this page.

The format of the basic access URL is as follows:

```
https://<company domain>/learning/user/nativelogin.do
```

For example, if your company domain is `CompanyA.com`, the basic access URL would be as follows:

```
https://CompanyA.com/learning/user/nativelogin.do
```

3.2 Creating a Registration Form for Basic Access

The basic access registration form captures information from people when they register for a Learning-only account through the basic access page.

Prerequisites

You need to activate Identity Authentication Integration before people can create accounts. See How to Integrate SAP SuccessFactors Learning and SAP Cloud Identity Services for more details.

Context

When people access the URL to launch the basic access login page for the first time, they select the *New User?* link to create an account. You can configure which fields display on the registration form and can define whether each field is mandatory or optional.

> **Note**
>
> You can choose fields to display and define whether they're mandatory but you can't change how the system orders or groups fields in a section. If you don't include any fields in a section, then the system hides that section and its heading on the registration page.

Procedure

1. Go to *System Administration* > *Application Administration* > *User-Created Account*.
2. Select *Allow Users to self-create a SuccessFactors Learning account (Activating Identity Authentication Integration is a prerequisite to self-registration and Learning access)*.
3. If you'd like account requests to go through a configured approval process to gain access to Learning, select *Approval Required*.
4. Select *Allow users to choose an ID while creating a new account* to allow people to choose the unique ID that they'll use to log in. If you don't allow people to choose their own ID, then the system automatically generates a unique ID.

   The format is defined in *System Administration* > *Configuration* > *Auto Generated IDs*.
5. Select the *Default User Role ID* assigned to each person who registers for an account using the basic access URL.
6. Select the *Default License User Type* assigned to people who register for an account using the basic access URL.

   Values are *Active* or *Functional* and correspond to your SAP global license agreement. This license designation has no impact on a user's capabilities within SAP SuccessFactors Learning.

7. Review the message in the *User-Created Account Introduction Message* field. This message displays at the top of the registration page when people register for their accounts. Choose *Edit* to modify the default message and create additional values for other locales, as needed.
8. Review the message in the *User-Created Account Success Message* field. This message displays when people submit their registration form. Choose *Edit* to modify the default message and create additional values for other locales.
9. In the *Contact Information* section, the contact information to collect and define which fields are mandatory. The following fields are required by the system and can't be configured:
   - User ID
   - Password/Re Enter Password
   - Security Q&A

   The remaining fields are discretionary. If you don't require the *Last Name* to be provided, you'll need to build an IPS transformation rule so that a value can be populated in Identity Authentication.
10. Select whether the *Job Location* field displays and if it's mandatory.

    Job location information is defined in *References* > *Geography* > *Job Location*.
11. If billing and shipping information is needed for your training operations, you can choose to display fields in the *Finance* section and define whether they're mandatory.
12. In the *Preferences* section, you can choose whether people can select their own preference for locale, currency, and time zone. If they don't make their own selections, the default values are used.
13. If you'd like to capture additional information, you can select up to five custom fields to display on the registration page.

    User custom fields are defined in *System Administration* > *Custom Fields* > *User* > *User Custom Fields*.
14. Choose *Apply Changes*

Next Steps

If you selected *Approval required*, you'll need to configure the approval process and schedule the *Set User Account Request Approval Process* automatic process so that pending account requests are routed to approvers.

3.3 Creating Self-Registration Approval for Basic Access

Create a self-registration approval process for SAP SuccessFactors Learning when you want people who create their own Learning-only user account to be approved before they can log in through a basic access URL.

Prerequisites

Create at least one approval process (*References* > *System Administration* > *Approval Roles*).

Context

If you decide that people who self-register need to go through a configured approval process to gain access to Learning, you need to define the process. You can select a default approval process for all self-registered accounts, or you can create assignment profiles to direct pending user requests to a specific approval process. When the *Set User Account Request Approval Process* automatic process runs, it looks to match the request with an assignment profile and then applies the approval process defined on the *User-Created Account* tab for that assignment profile. If there are multiple assignment profiles that match, it applies the last one it finds. If no assignment profiles match, it applies the default approval process.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Application Administration* > *User-Created Account*.
2. In the *User Settings* section, select the *Approval required* checkbox.
3. Choose *Apply Changes*.
4. Go to *System Administration* > *Configuration* > *Global Application Settings* > *Approval Process Settings* and select an approval process for the *Default User-Created Account Process ID*.
5. Choose *Apply Changes*.
6. Go to *System Administration* > *Automatic Processes* > *Set User Account Request Approval Process* and schedule the automatic process to assign pending user requests to an approval process.
7. Optionally, go to *System Administration* > *Automatic Processes* > *User-Created Account Approval Reminder* and schedule reminders to be sent to approvers with pending approval requests.

3.4 Adding a Logo to the Basic Access Login Page

You can add a logo to the login page that displays to Learning-only users who access SAP SuccessFactors Learning through a basic access URL.

Context

Logos for your internal workforce are part of the theme in SAP SuccessFactors Platform. You can choose a logo to display to Learning-only users on the basic access login page.

Procedure

1. Save a logo image to an accessible location.
2. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *Images*.
3. In the *Logo Image* section, choose *Choose File* and then browse your files to locate the logo.
4. Choose *Save*.
5. Refresh your browser.

   If you don't see the logo that you uploaded, clear your browser's cache and reload the page.

4 SAP SuccessFactors Learning Sites

Implementation consultants or administrators can set up sites so that Learning-only users in the extended enterprise can access SAP SuccessFactors Learning.

A site is a URL that is unique to a group of Learning-only users. When you create a site, the system generates a URL and then you define the behavior of the site at that URL. You can define how users register, display custom branding on the site, and provide guest access to the course library. You manage the site from SAP SuccessFactors Learning Administration.

Sites are separate from authentication. A Learning-only user who is associated with one site can authenticate through another site. This behavior is managed using conditional authentication in Identity Authentication.

4.1 Adding SAP SuccessFactors Learning Sites for Your Extended Enterprise

Add an SAP SuccessFactors Learning site so that Learning-only users in your extended enterprise can access their own URL for training and recognize their own brands.

Context

If you have a network of channel sales partners, each group can have its own URL that you can send to them and each partner can see its own logo, colors, and custom introduction at the URL. By dividing the extended enterprise

into multiple sites, you can activate and deactivate the sites individually and you can control the user experience for each site.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *Sites*.
2. For each site that you want to create, choose *Add New*.
3. Complete the required summary fields in *Add New Site* and then choose *Apply Changes*.

Next Steps

Each new site uses default values and settings. Use the links in the Related Information to explore options for modifying your new site.

Sites Summary Fields [page 15]
: Site summary fields include basic setup of an individual extended enterprise site.

Related Information

Controlling Access to SAP SuccessFactors Learning Sites [page 24]
Configuring a Combination of Single Sign-On (SSO) and Username and Password based Login for Learning-Only Audiences
Creating a Site's Registration Form [page 18]
Assigning a Guest Library to a Site [page 69]
Customizing the Appearance of SAP SuccessFactors Learning Sites [page 29]
Sites Summary Fields [page 15]

4.1.1 Sites Summary Fields

Site summary fields include basic setup of an individual extended enterprise site.

You can access site summary fields by going to *System Administration* > *Application Administration* > *Sites*.

Field Name	Description
Site ID	The unique ID for a specific site.

Field Name	Description
Site URL (Library)	The Site URL (Library) is the system-generated URL assigned to the site and used by a Learning-only user to access a library of available courses. You can test the URL by copying and pasting it into a browser.
Site URL (Login)	The Site URL (Login) is the system-generated URL assigned to the site and used by a Learning-only user to access the SAP SuccessFactors Learning application. You can test the URL by copying and pasting it into a browser.
SAP Identity Service Application ID	Read-only value that displays after activating Identity Authentication.
Description	The description of the site. The *Description* is only visible to administrators and can be used to understand the purpose of the site and differentiate between sites. Because the content of this field doesn't appear in the user interface or any reports, we recommend that you use the field to fully explain to other administrators the purpose for creating this entity.
Default Security Domain ID	This is the default security domain of users for this site. People who self-register for this site are placed in this security domain. You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Default Organization ID	This is the default organization of users for this site. People who self-register for this site are placed in this organization. The default organization is important because you most often assign course libraries to a site through the user's organization.
Default Active Locale ID	This is the default locale for users of the site. People who self-register for this site are placed in this locale by default. You can also configure the registration page to allow people to select a locale. The active locale ID references the language and syntax for numbers and currencies of the site.
Currency ID	The default currency of the site, which is important if you want users of the site to pay for their training.

Field Name	Description
Default Time Zone ID	This is the default time zone for users of the site. People who self-register for this site are placed in this time zone by default. When you select a time zone (for example, Eastern Standard Time), the system automatically displays the record in that time zone. Set the default time zone to the time zone where you expect the majority of the site's users.
Always Display Classes in this Time Zone	If you select this check box, then the system displays classes in the same time zone for all users; however, users can select the *Always Display Classes in this Time Zone* check box in the user interface to show classes in their preferred time zone.
Default User Role ID	This is the default user role ID for users of the site. People who self-register for this site are assigned this user role ID by default.
Default License User Type	This is the default license user type for users of the site. People who self-register for this site are assigned this license user type by default. Values are *Active* or *Functional* and correspond to your SAP global license agreement. This license designation has no impact on a user's capabilities within SAP SuccessFactors Learning.
Registration Validation	There are 3 options for validating people who create accounts through a site: *None*, *Site Registration Code*, and *Approval Process*. The default value, *None*, allows people to create accounts without validation. Select *Site Registration Code* to require people to provide a unique code when registering for this site. You need to create the codes (*System Administration* > *Application Administration* > *Sites* > *Registration Codes*) and then provide to people so they can register. Select *Approval Process* to require an approval process for people registering for this site. You need to create an approval process (*References* > *System Administration* > *Approval Process*) and someone in your company will need to approve each person after they register.
Active	Select the checkbox to indicate that the site is in use.
User Interface Display	The User Interface Display options allow you to edit the login page with a What You See Is What You Get (WYSIWYG) editor. Choose *Edit Login Page* to access the editor.

Field Name	Description
New Account Panel	The text you enter in this panel displays at the top of the registration page to people who are registering to become new Learning-only users through the site. Sites are internationalized. You can use Label IDs from the system to populate this panel and the values are translated based on the locale of the site. This site-specific text displays above the global text defined in *User-Created Account Introduction Message* (*System Administration* > *Application Administration* > *User Created Account*).

Parent topic: Adding SAP SuccessFactors Learning Sites for Your Extended Enterprise [page 14]

4.2 Creating a Site's Registration Form

The site's registration form captures information from people who register for their own accounts to become Learning-only users. You can define the information they need to provide when creating the account and the default values for the account.

Prerequisites

Before you can create the registration for a site, you need to create the site and you need to define the global settings for user-created accounts.

- Create a site in *System Administration* > *Application Administration* > *Sites*.
- Define the global settings for user-created accounts in *System Administration* > *Application Administration* > *User-Created Account*.

Context

This form displays to people when they register for a Learning-only user account through a site. You can configure which fields display on the form and can define whether fields are mandatory or optional. The default values are defined in the global settings for user-created accounts. You can modify these values for each site.

Procedure

1. In SAP SuccessFactors Learning Administration, go to *System Administration* > *Application Administration* > *Sites* and then search for and edit the desired site.
2. On the *User-Created Account* tab, scroll to the bottom and choose *Edit*.
3. Adjust the default settings by selecting the mandatory and optional fields for this site's registration.
4. Choose *Apply Changes*.

   User-Created Account (Global) [page 19]
   : Use these fields to define how people register for their own accounts and what information they need to provide when creating the account to become a Learning-only user.

   User-Created Account (Site) [page 22]
   : Use these fields to control the information you require from people who register for their own accounts to become Learning-only users through a site.

4.2.1 User-Created Account (Global)

Use these fields to define how people register for their own accounts and what information they need to provide when creating the account to become a Learning-only user.

You can offer Learning content to business partners and customers in your extended enterprise and you can choose to allow these people to create their own accounts. In *System Administration* > *Application Administration* > *User Created Account*, you define whether people can create their own user account. You also define the fields that display on the registration page and which fields are mandatory for account creation. The settings define the process for people to register for an account using the basic access URL and also become the default values when defining the process for people to register through a site.

> **Note**
>
> You can choose fields to display and define whether they're mandatory but you can't change how the system orders or groups fields in a section. If you don't include any fields in a section, then the system hides that section and its heading on the registration page.

User Settings

These settings control whether people can create their own account to become a Learning-only user. The selections define whether there's an approval process and what the default values are for key account information.

Field	Description
Allow Users to self-create a SuccessFactors Learning account (Activating Identity Authentication Integration is a prerequisite to self-registration and Learning access).	Select this checkbox to give people permission to create their own account to become a Learning-only user. You'll need to complete the rest of this page. You'll also need to activate Identity Authentication Integration. See How to Integrate SAP SuccessFactors Learning and SAP Cloud Identity Services for more details. Clearing this checkbox hides the *Create New Account* function (under the *Personal* tab) and the *Click here to register* option on the site's login page. Disabling these options prevents users from creating their own accounts. You can skip the remaining settings on this page as they aren't used if this checkbox is cleared.
Approval Required	Select this checkbox to require account requests to go through a configured approval process to gain access to Learning.
Allow users to choose an ID while creating a new account.	Select this checkbox to allow people to choose the unique ID that they'll use to log in. If you don't allow people to choose their own ID, then the system automatically generates a unique ID. The format is defined in *System Administration* > *Configuration* > *Auto Generated IDs*.
Default User Role ID	Select the *Role ID* assigned to each person who registers for an account using the basic access URL. It's also the default *Role ID* for people who register for an account on a site. Administrators can change this default value for each site. The available values are determined by the administrator's permissions.
Default License User Type	Select the license user type assigned to people who register for an account using the basic access URL. It's also the default license user type for people who register for an account on a site. Administrators can change this default value for each site. Values are *Active* or *Functional* and correspond to your SAP global license agreement. This license designation has no impact on a user's capabilities within SAP SuccessFactors Learning.

Instructional Text

The message defined in the *User-Created Account Introduction Message* displays at the top of the registration page when people register for their accounts. The same message displays to people registering through the basic access URL or through a site. You can configure each site to display additional information to people registering through a site. Choose *Edit* to modify the default message and create additional values for other locales.

The message defined in the *User-Created Account Success Message* displays when people submit their registration form. The same message displays to people registering through the basic access URL or through a site. Choose *Edit* to modify the default message and create additional values for other locales.

Contact Information

You can choose the contact information to collect and define which fields are mandatory. The following fields are required by the system and can't be configured:

- User ID
- Password/Re Enter Password
- Security Q&A

The remaining fields are discretionary. If you don't require the Last Name to be provided, you'll need to build an IPS transformation rule so that a value can be populated in Identity Authentication.

- First Name
- Middle Name
- Last Name
- Email Address
- Main Address
- City
- State / Province
- Postal Code
- Country/Region
- Telephone Number

Employee Information

You can choose whether the Job Location field displays and if it's mandatory. Job location information is defined in *References* > *Geography* > *Job Location*.

Finance

If billing and shipping information is needed for your training operations, you can choose to display these fields and define whether they're mandatory.

- Billing Address
- Billing Phone Number
- Shipping Address
- Shipping Phone Number

Preferences

You can choose whether people can select their own preference for Locale, Currency, and Time Zone. If they don't make their own selections, the default values are used.

Custom Fields

If you'd like to capture additional information, you can select up to five custom fields to display on the registration page. If you don't see a custom field that you need, then you can create a new one in the User Custom Fields section (*System Administration* > *Custom Fields* > *User*).

Parent topic: Creating a Site's Registration Form [page 18]

Related Information

User-Created Account (Site) [page 22]

4.2.2 User-Created Account (Site)

Use these fields to control the information you require from people who register for their own accounts to become Learning-only users through a site.

The default values for all sites are defined in *System Administration* > *Application Administration* > *User Created Account*. You can edit the values for a specific site by choosing *Edit* at the bottom of the page in *System Administration* > *Application Administration* > *Sites* > *User-Created Account*.

Contact Information

You can choose the contact information to collect and define which fields are mandatory. The following fields are required by the system and can't be configured:

- User ID
- Password/Re Enter Password
- Security Q&A

The remaining fields are discretionary. If you don't require the Last Name to be provided, you'll need to build an IPS transformation rule so that a value can be populated in Identity Authentication.

- First Name
- Middle Name
- Last Name
- Email Address
- Main Address
- City
- State / Province
- Postal Code

- Country/Region
- Telephone Number

Employee Information

You can choose whether the Job Location field displays and if it's mandatory. Job location information is defined in *References* > *Geography* > *Job Location*.

Finance

If billing and shipping information is needed for your training operations, you can choose to display these fields and define whether they're mandatory.

- Billing Address
- Billing Phone Number
- Shipping Address
- Shipping Phone Number

Preferences

You can choose whether people can select their own preference for Locale, Currency, and Time Zone. If they don't make their own selections, the default values are used.

Custom Fields

If you'd like to capture additional information, you can select up to five custom fields to display on the registration page. If you don't see a custom field that you need, then you can create a new one in the User Custom Fields section (*System Administration* > *Custom Fields* > *User*).

Parent topic: Creating a Site's Registration Form [page 18]

Related Information

User-Created Account (Global) [page 19]
User-Created Account (Global) [page 19]

4.3 Controlling Access to SAP SuccessFactors Learning Sites

You can control how people create accounts to access SAP SuccessFactors Learning sites.

There are multiple options for validating people who create accounts through a site: *None*, *Site Registration Code*, and *Approval Process*.

The default value, *None*, allows people to create accounts without validation.

Using *Site Registration Code* requires people to provide a unique code when registering for this site. You need to create the codes (*System Administration* > *Application Administration* > *Sites* > *Registration Codes*) and then provide to people so they can register.

Using *Approval Process* requires an approval process for people registering for this site. You need to create an approval process (*References* > *System Administration* > *Approval Process*) and someone in your company will need to approve each person after they register.

You can also configure CAPTCHA authentication for registration forms (*System Administration* > *Configuration* > *System Configuration* > *Web Security*).

4.3.1 Choosing Between Approval Processes and Registration Codes

When you allow people in your extended enterprise to create their own accounts through a site, you can choose how you want to verify them before granting access to SAP SuccessFactors Learning.

When people create an account through a site to become a Learning-only user, you have options for verification. You can verify them by sending them through an approval process to verify them as valid members of your external enterprise or by creating and distributing registration codes that users provide as verification when they register.

There's some administration required for each method:

- If you use registration codes, then you need to maintain those registration codes and distribute them so that people can register.
- If you use approval processes, then someone in your organization needs to approve each person before they're granted access as a Learning-only user.

4.3.2 Adding Site Registration Codes

Add site registration codes to control who can create an account on your Learning sites.

Context

When you enable site registration codes, users who want to sign up for an account on your Learning sites must provide the code that you've supplied them. You add the codes to the system so that SAP SuccessFactors Learning can verify them when the user attempts to create an account.

Procedure

1. Go to *System Administration* > *Application Administration* > *Sites* and search for and select a site.
2. On the *Summary* tab, confirm that the *Registration Validation* field is set to *Registration Code*.
3. On the *Site Registration Codes* tab, create registration codes for site users.
   - To upload registration codes in batch, go to *System Administration* > *System Management Tools* > *Import Data* and download the *Site Registration Code* template.

> **Note**
>
> After a site registration code has been used one time, you can no longer remove it because the system assumes that it is in use.

Related Information

Choosing Between Approval Processes and Registration Codes [page 24]
Site Registration Codes [page 25]

4.3.2.1 Site Registration Codes

Administrators can add a registration code to sites to limit the users who can sign up. Users must provide the code to register for the site.

You can access the site registration codes for a particular site in SAP SuccessFactors Learning administration by going to *System Administration* > *Application Administration* > *Sites*.

> **Note**
>
> After a site registration code has been used one time, you can no longer remove it because the system assumes that it is in use.

This field...	...Is Used as Follows
Code ID	The *Code ID* is the unique code that you supply to users who want to register for the site. For example, if you type the code "Welcome!123" then users wanting to register for this site must provide the code "Welcome!123" along with their account information on the *Create New Account* page.
Description	Use *Description* to describe the code. Because you can have more than one code, you need to describe each code to distinguish them from one another. For example, you might use one code for the Information Technology department and another code for the Sales department. You can write "For IT Department" and "For Sales Department" in the description fields so that you and other administrators can tell the difference between codes.
Max Usage and *Redemptions*	The *Max Usage* field stores the maximum number of times that the code can be used. For example, if you want to give the code to the Sales department, but want only 10 salespeople to sign up, you can set a maximum usage of 10. After you create the code, you see the *Redemptions* column in the table. The *Redemptions* column tells you how many times the code has been used as a fraction of the maximum times it can be used.
Start Date	The start date is the first date that the code can be used. If you want to use the code immediately, set the start date in the past because the start date is relative to the site's time zone, not your time zone.
Expiration Date	The expiration date is the date on which the code expires and users must start using a new code. If you expire a code, you must remember to create a new one to start after the current code expires. One strategy is to create multiple codes at once. For example, at the beginning of the year, you can create a code for January, February, March, and so on, with 12 codes total, each lasting a month. January's code starts on the first day of January and ends on the first day of February, overlapping by one day to assure that users can always create accounts. February starts on February First and ends on March First, and so on. As with the start date, the expiration date is in the time zone of the site, not your time zone.

Related Information

Adding Site Registration Codes [page 25]
Sites Summary Fields [page 15]

4.3.3 Creating Self-Registration Approval for Sites

Create a self-registration approval process for SAP SuccessFactors Learning sites when you want people who create their own Learning-only user account to be approved before they can log in.

Prerequisites

- Create at least one approval process.
- Configure the global behavior of your approval processes in *System Administration* > *Configuration* > *Global Application Settings* > *Approval Process Settings*.
- Create at least one site in *System Administration* > *Application Administration* > *Sites*.

Context

If you decide that people who self-register need to go through a configured approval process to gain access to Learning, you need to define the process. You can select a default approval process for all self-registered accounts, or you can create assignment profiles to direct pending user requests to a specific approval process. When the *Set User Account Request Approval Process* automatic process runs, it looks to match the request with an assignment profile and then applies the approval process defined on the *User-Created Account* tab for that assignment profile. If there are multiple assignment profiles that match, it applies the last one it finds. If no assignment profiles match, it applies the default approval process.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Application Administration* > *Sites*.
2. Search for the site that should have the approval process and select the *Edit* icon.
3. On the *Summary* tab, select *Approval Process* in *Registration Validation*.

> **Restriction**
>
> You can't use both registration codes and approval processes for a site's registration validation.

4. Review the values in the *Default Security Domain ID* and *Default Organization ID*.

   You set the default security domain and organization so that custom approval roles can work properly. Custom approval roles depend on either security domains or organizations to route approvals to the correct person within the role. You configure the *Control Entity for Approval Role* in *System Administration* > *Configuration* > *Global Application Settings* > *Approval Process Settings*.

   For example, two users can both be in the "IT Approvers" role, but controlling two different organizations, like SALES and FINANCE. Learners from the sales organization who request approval are routed to the person who controls SALES approvals and learners from the finance organization who request approval are routed to the person who controls FINANCE approvals.
5. Choose *Apply Changes*.

Next Steps

Optionally, you can create an assignment profile to set the approval processes by user attributes (from the request form). This step is optional and recommended only if you need it. To keep your registration process simple, use the default approval process setting in *System Administration* > *Configuration* > *Global Application Settings* > *Approval Process Settings*. When you use the default process only, everyone who self-registers through a site or the basic access URL use the same process.

Configure a background process to associate approval processes with pending user-created account requests. Go to *System Administration* > *Automatic Processes* > *Set Account Request Approval Process*.

Optionally, configure reminders to go to users who haven't yet approved user-created account requests. Go to *System Administration* > *Automatic Processes* > *User-Created Account Approval Reminder*.

Related Information

Choosing Between Approval Processes and Registration Codes [page 24]
Advice for Creating Approval Processes for Self-Registration [page 72]
Overview of Approval Process for Self-Registration [page 71]
SAP SuccessFactors Learning Sites [page 14]
Approving Account Requests as an Administrator [page 77]

4.4 Customizing the Appearance of SAP SuccessFactors Learning Sites

You can customize how SAP SuccessFactors Learning sites appear to your Learning-only users through brands and themes.

Related Information

SAP SuccessFactors Learning Brands [page 29]
Assigning a Brand to a Site [page 31]

4.4.1 SAP SuccessFactors Learning Brands

Brands customize the look and feel of Learning sites for Learning-only users.

Brands are assigned to a site indirectly through organizations. Brands enhance the experience of Learning-only users when they go to the site.

4.4.1.1 Creating SAP SuccessFactors Learning Brands

Create SAP SuccessFactors Learning brands if you use sites for your extended enterprise and you want to customize the experience for Learning-only users.

Context

Brands customize the look and feel of Learning sites for Learning-only users. Brands are assigned to a site indirectly through organizations.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *Brands*.
2. Choose *Add New*.
3. In the *Add New Brands* dialog, enter a *Brand ID*, select the *Security Domain* that is associated with the administrators for this brand, then choose *Submit*.

4. On the *Edit Brands* page, update the remaining fields on the *Summary* tab and then choose *Apply Changes*.

4.4.1.2 SAP SuccessFactors Learning Brand Summary Fields

The SAP SuccessFactors Learning brand summary fields configure part of the look and feel for Learning sites. Learning-only users in the extended enterprise can access Learning through sites. Brands are assigned to a site indirectly through organizations.

Field Name	Description
Brand ID	The unique ID for a specific set of styles that define a brand.
Description	The description of the brand. The *Description* is only visible to administrators and can be used to understand the purpose of the brand and differentiate between brands.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator. Use the *(search icon)* to search for and select a value. **Note** This field controls administrator access to this brand. It **doesn't** associate the brand to a security domain.
SuccessFactors Platform Theme	This is the theme that Learning-only users see in their learning site after they sign in. It is applied to the elements that support theming. You can choose an existing theme from the list or leave the field blank to apply the default SAP SuccessFactors Platform theme (as defined in *Admin Center* > *Theme Manager*).
Introduction Panel ID	The introduction panel controls the text that appears to users in the news panel. The text is defined in *System Administration* > *Application Administration* > *User Introductions*. Use the *(search icon)* to search for and select a value.

Field Name	Description
Header	This is the content that appears at the top of the Site's page. You can include dynamic content, called "System Components." To see a list of system components and what each component adds, choose the *Show System Components* link in the note above the field. You can also include inline HTML tags like ` ` for break or `<i>` for italic text. **Note** If you define a header style, it overrides the theme completely. Any component that isn't specified here will use the default theming from the UI component. It's highly recommended that you work with someone who has HTML expertise.
Footer	This is the content that appears at the bottom of the Site's page. You can include dynamic content, called "System Components." To see a list of system components and what each adds, choose the *Show System Components* link in the note above the field. You can also include inline HTML tags like ` ` for break or `<i>` for italic text.

4.4.1.3 Assigning a Brand to a Site

Brands are assigned to a SAP SuccessFactors Learning site indirectly through organizations. Brands enhance the experience of Learning-only users when they go to the site URL.

Prerequisites

Before you can assign branding, you need to create both the brand and the site. You create them in Learning Administration.

- Create a site in *System Administration* > *Application Administration* > *Sites*.
- Create a brand in *System Administration* > *Application Administration* > *Brands*.

Context

Sites are defined with a default organization. For each organization, you can define a branding style. Through the organization, sites are branded. If the default organization doesn't have a brand associated, the brand associated with the parent organization is applied.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *Sites*.
2. Find and open the site that you want to brand.
3. On the *Summary* tab, look at the value of *Default Organization ID*.
4. Go to *People* > *Organizations* and open the organization that you found in *Default Organization ID* for the site.
5. On the *Summary* tab, add the branding style for the site in *Branding Style* and then choose *Apply Changes*.

Related Information

Adding SAP SuccessFactors Learning Sites for Your Extended Enterprise [page 14]
Customizing the Appearance of SAP SuccessFactors Learning Sites [page 29]
SAP SuccessFactors Learning Brand Summary Fields [page 30]

4.4.2 Managing Themes with Theme Manager

You can use the *Theme Manager* tool to create and manage themes.

To access it, you need the *Company System and Logo Settings* permission.

4.4.2.1 Selecting a Default Theme

Select a default theme, which is visible to every group to which you have not assigned a unique theme. You can select any of the predefined themes delivered with the application, or you can select a custom theme that you have already created.

Prerequisites

You have *Company System and Logo Settings* permission.

Procedure

1. Go to *Admin Center* > *Theme Manager*.
2. Select the radio button next to the desired theme, in the *Default* column.
3. Click *Save* to save your changes.

> → Tip
>
> You may need to log out and log back in to view the new default theme applied to your instance.

4.4.2.2 Creating a Theme

Create a new theme that's based on one of the predefined themes in *Theme Manager*.

Prerequisites

You have *Company System and Logo Settings* permission.

Context

To create a new theme, you always use one of the predefined themes as a starting point. That way, you're sure that all theme settings have a default value and you only need to change the things you want to change.

Procedure

1. Go to *Admin Center* > *Theme Manager*.
2. Find the predefined theme you want to use as the basis for your new theme.
3. Choose the *More* icon (three stacked dots) and then choose *Duplicate*

   The *Edit Theme* page opens.
4. In the *Getting Started* section, update the theme name and theme description.
5. Change other theme settings as needed.
6. Save your changes.

> **Note**
>
> You're asked to confirm your changes in the *Save Changes* dialog because theme settings are publicly viewable by users of the OData API.

Results

The custom theme is saved and can be used.

Next Steps

You can use the *Try it out* option to preview and test the theme, before using it in a prodution system.

4.4.2.3 Editing a Theme

Edit a custom theme and preview changes in *Theme Manager*.

Prerequisites

- You have *Company System and Logo Settings* permission.
- The custom theme has been saved.

Procedure

1. Go to *Admin Center* > *Theme Manager*.
2. Find the custom theme you want to edit and choose the theme name.

   The *Edit Theme* page opens.
3. Update theme settings as needed.

   Changes are reflected in the *Theme Preview* pane before you save them.
4. To preview changes with and without the latest SAP Fiori style, use the *Preview styling* menu.
   - Select *Latest* to preview changes as they appear on pages that use the latest SAP Fiori style.
   - Select *Legacy* to preview changes as they appear on pages that **don't** use the latest SAP Fiori style.
5. Save your changes.

4.4.2.4 Assigning a Theme to Different Employee Groups

Assign themes to different groups of users so that people in different groups see different themes.

Prerequisites

You have *Company System and Logo Settings* permission.

Context

Themes can be assigned based on division, department, or location. The criteria that's used can be configured in Provisioning.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

The default criteria is *Division*. If you don't want to assign different groups to different themes, all divisions are assigned to the default theme.

Procedure

1. Go to *Admin Center* > *Theme Manager*.

2. Locate the theme you want to assign to a group.
3. In the *Visible to* menu, select the employee groups who you want to see the theme.

   > → Tip
   >
   > The default theme is seen by all users that aren't members of a group with an assigned theme.

4. Save.

4.4.2.5 Copying a Theme from One System to Another

Use the *Theme Sharing* feature to copy themes from one system to another.

Prerequisites

You have *Company System and Logo Settings* permission, in both the **source** and the **target** instance.

Context

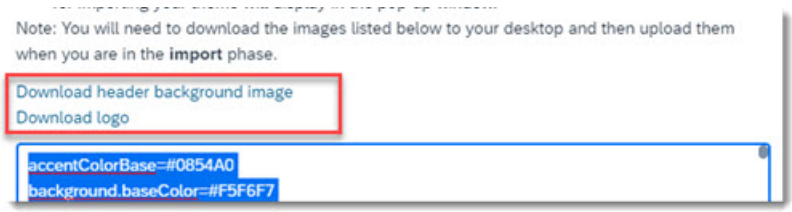
After you've configured and tested a new theme in your test system, you can use *Theme Sharing* to copy it into your production system. Or, if you're troubleshooting an issue in your production system, you can copy the production theme into your test system.

You can use *Theme Sharing* to copy Cascading Style Sheet (CSS) code into a text editor, so that it can be pasted into another system. You can also use it to download image files that are used in the theme, like logo or header background images, so that you can upload them into another system.

Procedure

1. Log into the **source** system (the system you want to copy **from**).
2. Export a theme from the **source** system.
   a. Go to *Admin Center* > *Theme Manager* and choose the theme you want to export.
   b. On the *Edit Theme* page, go to *Theme Sharing* > *Export Theme*.

      An *Export Theme* dialog opens, containing instructions and a text box containing CSS code.
   c. Select all of the CSS code, copy it, and paste it into a text editor. Save the text file, as a backup.
3. Download images used in the **source** theme.
   a. Find links to view each image, in the *Export Theme* dialog, below the onscreen instructions, above the text box. If no links are shown, the theme contain any images.



   b. For each image, choose the link to open it in your browser and then save a copy. Save it in the same location as the exported theme, as a backup.

4. Log into the **target** system (the system you want to copy **to**).
5. Go to *Admin Center* > *Theme Manager* and choose the existing theme that you want to import the CSS code and images to, or create a new one.

   If you create a new theme, you don't need to do any configuration. All configurations, including the theme name and description, are included in the code you copied from the source.

6. On the *Edit Theme* page, go to *Theme Sharing* > *Import Theme*.

   An *Import Theme* dialog opens, containing instructions and a **blank** text box.

7. Open the text file containing CSS code you copied from the source system, select all of the text, copy it, and paste it into the blank text box in the *Import Theme* dialog.
8. Choose *Import*.

   All configurations in the **source** theme are copied into the **target** theme. The prefix "Copy Of" is added to the theme name and description in the target theme.

9. Edit the theme name and description, as needed. Then save the theme.

   The target theme is now **mostly** the same as the source theme. You still need to manually import the images.

10. Upload the images you saved from the source theme, into the target theme.

    You need to manually upload each image to the target system. You only need to upload images that you downloaded from the source theme. Here are some theme settings that may include images:

    - Background Image
    - Header Background Image
    - Logo Image
    - Desktop Banner Image
    - Login Background
    - Login Logo
    - External Favicon
    - External Footer Logo

11. Save changes in the **target** system.

Results

The target system now has a custom theme that's identical to the theme you copied from the source system.

4.4.3 Theme Settings in Detail

Learn about all of the theme settings that you can configure in a custom theme.

When you create or edit a custom theme, you can configure theme settings in the following categories:

- *Getting Started* (the name and description of the theme)
  Quick Theme (for a few simple options)
- *Fine Tune* (for detailed theming capabilities)
- *Login Styles* (for the SAP SuccessFactors login page)
- *External User Styles* (for SAP SuccessFactors Learning)

Quick Theme Settings [page 38]
Use *Quick Theme* settings to make quick changes to the overall theme without having to customize a lot of different UI elements.

Fine Tune Theme Settings [page 41]
Use *Fine Tune* settings to customize the theming of different UI elements.

Login Style Theme Settings [page 61]
Use *Login Styles* settings to apply theming to the login page.

External User Styles in Themes for SAP SuccessFactors Learning [page 66]
External user style theme attributes control the Learning Marketplace experience in SAP SuccessFactors Learning.

4.4.3.1 Quick Theme Settings

Use *Quick Theme* settings to make quick changes to the overall theme without having to customize a lot of different UI elements.

You can customize:

- Page background color
- Accent color scheme
- Use of text shadows
- Use of container shadows
- Use of downloadable fonts
- Use of advanced styles in older browsers

Setting the Page Background Color for a Theme [page 39]
You can use the color picker or type in the hexadecimal value to set the overall solid background color. The *Page background color* appears behind any pictures you add to the background.

Configuring Accent Color Schemes in Quick Themes [page 39]
When you select and apply a color, SAP SuccessFactors automatically generates accent colors based on your selection. Accent colors can be assigned for portlet headers, primary buttons, menu highlights, navigation labels, and table background colors.

More Quick Theme Settings [page 40]
Quick Theme allows you to be able to add shadows to your text, containers, enable downloadable fonts and use advanced styles for older browsers.

4.4.3.1.1 Setting the Page Background Color for a Theme

You can use the color picker or type in the hexadecimal value to set the overall solid background color. The *Page background color* appears behind any pictures you add to the background.

Procedure

1. Go to *Admin Center* > *Theme Manager* .

   You are in *Manage Themes* page.
2. From *Manage Themes* page, select the theme you want.

   Selecting your theme opens the *Edit Theme* page.
3. From the *Edit Theme* page, go to *Quick Themes* > *Page background color* .
4. Go to the color picker icon and select your *Page background color* by doing any of the following:
   - Choose the color you want with your mouse
   - Enter the RGB or HSV values for your color
   - Enter the Hex Codes for your color
5. Select the *Apply* button to exit the *color picker* to apply your changes.
6. To finish, you can either:
   - Preview your changes, by selecting the *Try it out* option.
   - Select *Save* to finish.

4.4.3.1.2 Configuring Accent Color Schemes in Quick Themes

When you select and apply a color, SAP SuccessFactors automatically generates accent colors based on your selection. Accent colors can be assigned for portlet headers, primary buttons, menu highlights, navigation labels, and table background colors.

Procedure

1. Go to *Admin Center* > *Theme Manager* .

   You are in *Manage Themes* page.
2. From *Manage Themes* page, select the theme you want.

   Selecting your theme opens the *Edit Theme* page.
3. From the *Edit Theme* page, go to *Quick Themes* > *Accent color scheme based on* .
4. Go to the color picker icon and select your *Page background color* by doing any of the following:

- Choose the color you want with your mouse
- Enter the RGB or HSV values for your color
- Enter the Hex Codes for your color

5. Select the *Generate* button to generate your accent colors.

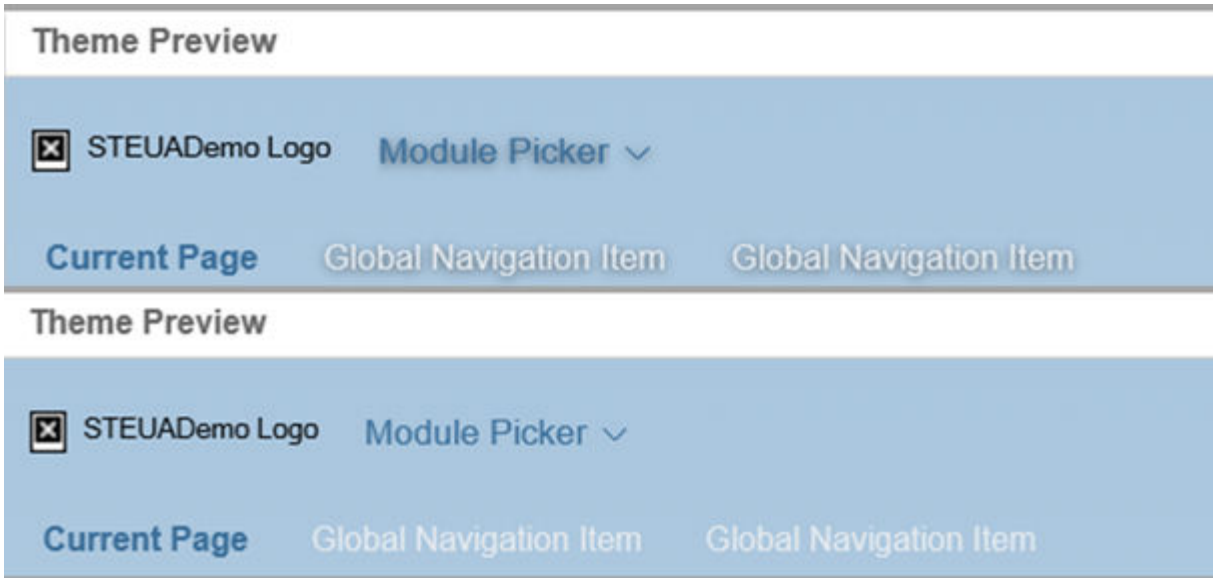
   A palette of 10 colors is generated, based on the accent color you provided. You can examples of the generated colors and their hexidecimal values. The values of some theme settings in the *Fine Tune* section ar replaced with values in the generated accent color scheme.
6. Select the *Apply* button to exit the *color picker* to apply your changes.
7. To finish, you can either:
   - Preview your changes, by selecting the *Try it out* option.
   - Select *Save* to finish.

4.4.3.1.3 More Quick Theme Settings

Quick Theme allows you to be able to add shadows to your text, containers, enable downloadable fonts and use advanced styles for older browsers.

Adding Shadows For Text

You can enable use of text shadow by selecting **Yes** under *Use text shadows* section.



Screenshot depicts Two images: Text Shadowing Turned on and With One Turned Off

Container Shadow

Container shadow controls whether containers have shadows and the darkness of them. You can select these options from the menu:

- None
- Dark
- Light

Use downloadable fonts

Unless directed by an SAP SuccessFactors representative, select **Yes**.

Use advanced styles in older browsers

Use advanced styles in older browsers allow you to use modern visual styles such as rounded corners and shadow effects on older browsers like Internet Explorer 7 and 8.

4.4.3.2 Fine Tune Theme Settings

Use *Fine Tune* settings to customize the theming of different UI elements.

Theme Settings: Background [page 42]
Change the background theme settings to control the appearance of the background image that's behind the placemat.

Theme Settings: Header Background [page 46]
You can change how the header background looks in your theme by changing the color, uploading images, and how your image is displayed.

Theme Settings: Logo [page 48]
Change logo settings to control how the logo appears in a theme.

Theme Settings: Placemat [page 48]
Change placemat settings to control the color of the "placemat" that surrounds the main content on the page. The placemat is visible on the edges of the display.

Theme Settings: Landing Page Theme [page 49]
Change the landing page theme setting to assign a different theme to landing pages.

Theme Settings: Module Picker [page 50]
Change module picker settings to control colors in the global page header.

Theme Settings: Menus [page 51]
Change menu settings to control the account navigation menu.

Theme Settings: Global Navigation [page 51]
Change the global navigation settings to control navigation bar that's shown on some pages, with tabs you can use to access different parts of the module or feature.

Theme Settings: Portlets [page 52]
Change the portlet settings to control the colors of "container" elements across the HCM suite.

Theme Settings: Home Page (Latest) [page 54]

Change the home page theme settings to control colors on the home page.

Theme Settings: Landing Page Tiles [page 55]
Change the landing page tile settings to control tiles on landing pages, such as the legacy home page.

Theme Settings: V12 Tiles [page 56]
Change the V12 tile settings to control tiles on the V12 Home Page.

Theme Settings: Primary Buttons [page 58]
Change primary button settings to control how the most important buttons on the user interface appear to users.

Theme Settings: Highlight Elements [page 58]
Change highlight element settings to control how important, highlighted information is passed to users on the user interface.

Theme Settings: Tables and Lists [page 59]
Change table and list settings to control how tables and some lists appear. (These settings are applied to lists that are essentially one-column tables, where each item is a row.)

Theme Settings: Diagrams [page 60]
Change diagram settings to control how graphic data is presented to the user - especially to highlight out of tolerance values.

Theme Settings: Footer [page 61]
Change footer settings to control how the legal boilerplate appears at the bottom of each page.

4.4.3.2.1 Theme Settings: Background

Change the background theme settings to control the appearance of the background image that's behind the placemat.

Background Image

Background Image Settings

Setting	Purpose
Select texture image	Used if you want a textured image as your background. There is a list of different textured images from the dropdown menu

Setting	Purpose
Enter URL for image	You can enter URL of an image you want to use as your background. If you host a background image on your intranet, you can use that URL. **⚠ Restriction** The URL must be reachable by SAP SuccessFactors defined by a change management process for that image. You do not want your intranet site administrator change the image without understanding how it impacts your theme.
Upload an image	Select *Upload an image* to upload an image. Click *Choose File* to browse for and upload the image.
No image	Select *No image* if you do not want to use an image.

Display of Background Image

Background Image Display Settings

Setting	Purpose
Repeat	Go to *Fine Tune* > *Background* > *Image display* > *Repeat* and select any option from the dropdown menu: • Select *Repeat* to create a tiled effect. • Select *Repeat X* to repeat horizontally. • Select *Repeat Y* to repeat vertically. • Select *No Repeat* to show background color if resizing window beyond the size of the image.

Setting	Purpose
Position	To select the vertical and horizontal starting position of the image, go to *Fine Tune* > *Background* > *Image display* > *Position*. The first dropdown is for horizontal positioning of your image, you can select any of the following: • *Left* • *Center* • *Right* The next dropdown menu is for vertical positioning of your image, you can select any of the following: • *Top* • *Center* • *Bottom* **Example** If you select *Left* and *Top*, your image repeats from the top left corner of the window.
Lighting	To configure background gradient to create a spotlight effect, for your image, go to *Fine Tune* > *Background* > *Lighting* with either of these two options: • If you do not want background gradient, select *None* • if you want background gradient, select *Fading from center*.

4.4.3.2.1.1 Configuring Your Background Image Display

You can set your background image to repeat when the size of the window is larger than the size of the image, and background gradient to create spotlight effect.

Procedure

1. Go to *Admin Center* > *Theme Manager* > *Manage Themes* and select the theme you want to customize.
2. To locate *Image display* settings, go to *Fine Tune* > *Background* > *Image display*.
3. To set up your Background image options:

Image Display Settings	Steps
Repeat	Go to *Fine Tune* > *Background* > *Image display* > *Repeat* and select any option from the dropdown menu: • Select *Repeat* to create a tiled effect. • Select *Repeat X* to repeat horizontally. • Select *Repeat Y* to repeat vertically. • Select *No Repeat* to show background color if resizing window beyond the size of the image.
Position	To select the vertical and horizontal starting position of the image, go to *Fine Tune* > *Background* > *Image display* > *Position*. The first dropdown is for horizontal positioning of your image, you can select any of the following: • *Left* • *Center* • *Right* The next dropdown menu is for vertical positioning of your image, you can select any of the following: • *Top* • *Center* • *Bottom* **Example** If you select *Left* and *Top*, your image repeats from the top left corner of the window.
Lighting	To configure background gradient to create a spotlight effect, for your image, go to *Fine Tune* > *Background* > *Lighting* with either of these two options: • If you do not want background gradient, select *None* • if you want background gradient, select *Fading from center*.

4. To finish, you can either:
   - Preview your changes, by selecting the *Try it out* option.
   - Select *Save* to finish.

4.4.3.2.2 Theme Settings: Header Background

You can change how the header background looks in your theme by changing the color, uploading images, and how your image is displayed.

Procedure

1. Go to *Admin Center* > *Theme Manager* > *Manage Themes* and select the theme you want to customize.
2. To locate *Header background* settings, go to *Fine Tune* > *Header background*.
3. To set up your *Header background* options:

Header background	Steps
Default	Select *Default* if you want to use as your default background header.
Solid Color	Select *Solid Color* for your *Header Background* appear as a solid color.
Upload an image	Select *Upload an image* to upload an image. Click *Choose File* to browse for and upload the image. To upload: 1. Select *Choose File* and browse to your image file. 2. Select *Upload* link. 3. Select *Save* to finish. → Tip When you use the *Upload an image*, image display options appear

4. When you have selected the *Upload an image*, option you can set up how you want your image displayed for your header background as outlined in this table:

Image Display Settings	Steps
Repeat	Go to *Fine Tune* > *Header background* > *Upload an image* > *Image display* > *Repeat* • Select *Repeat* to create a tiled effect. • Select *Repeat X* to repeat horizontally. • Select *Repeat Y* to repeat vertically. • Select *No Repeat* to show background color if resizing window beyond the size of the image.

Image Display Settings	Steps
Position	To select the vertical and horizontal starting position of the image, go to *Fine Tune* > *Header background* > *Upload an image* > *Image display* > *Position* The first dropdown is for horizontal positioning of your image, you can select any of the following: • *Left* • *Center* • *Right* The next dropdown menu is for vertical positioning of your image, you can select any of the following: • *Top* • *Center* • *Bottom* **Example** If you select *Left* and *Top*, your image repeats from the top left corner of the window.
Header background color	Use the color selector or enter in the hexadecimal value to set the overall solid header background color.
Width Type	To control the width of your header background, you can either select: • *Full browser body width* so that the header background as wide as the page. • *Placemat width* so that your header background is as long as the placemat. **Note** Any additional space to the left or right of the header displays the page background color or your image.

5. To finish, you can either:
   - Preview your changes, by selecting the *Try it out* option.
   - Select *Save* to finish.

4.4.3.2.3 Theme Settings: Logo

Change logo settings to control how the logo appears in a theme.

Logo Theme Settings

Setting	Description
Logo	Choose the logo that's shown in the theme. • Select *Use default logo* to use the default logo that's configured for the system (on the *Upload Company Logo* or *Company System and Logo Settings* page). • Select *Upload a logo* to use a different logo in the theme.
Logo background container	Choose whether to define a background color for area where the logo is shown. • Select *None* if you don't want to set a background color for the logo. • Select *Background Color* to define a background color for the logo.
Logo width	Set the width of the logo. • Select *Auto* to the width to be set automatically. • Select a width, in pixels, from the dropdown menu.

4.4.3.2.4 Theme Settings: Placemat

Change placemat settings to control the color of the "placemat" that surrounds the main content on the page. The placemat is visible on the edges of the display.

Placemat Theme Settings

Setting	Description
Page Title Color	Defines the color of the page title on **some** pages. On most pages (following the latest design standards), the page title color isn't customizable and this setting is ignored. → Tip **For greater consistency, make the page title text color the same on all pages, either black or white.** On most pages, the page title color is **not customizable**. For themes based on the default Morning Horizon color palette, it's black, on a white background. For themes based on the optional Evening Horizon color palette, it's white, on a dark gray background. Some pages still display the page title directly on the placemat and still use the *Page Title Color* theme setting. For a greater consistency, make it black or white.
Link color	Defines the color of links on the placemat.
Background Color	The color of the workspace where users interact with the user interface. This is separate from the background of the application. The background of the application is the frame around the workspace. If you set *Background Opacity* to zero, then you do **not** see the background color.
Background Opacity	Set the transparency to more than 0% if you want to see the background color. Set to 0% to hide the background color.
Selected Tab color	Defines the color of the selected tab on the placemat.
Background Type	You can choose *Dark* or *Light* background type.
Border Color	Defines the color of the thin line surrounding the placemat.
Use Shadow	If set to *Yes*, then the placemat has a slight shadow giving it the appearance it is hovering over the background.

4.4.3.2.5 Theme Settings: Landing Page Theme

Change the landing page theme setting to assign a different theme to landing pages.

> ⓘ Note
>
> In *Theme Manager*, a "landing page" is a page with a card-based or tile-based experience, such as the home page and the Admin Center homepage. You can apply different theme settings to landing pages than are used on other pages.

Landing Page Theme Theme Settings

Setting	Description
Landing page theme	Select a theme for the home page if you want it to be different from the primary theme.

4.4.3.2.6 Theme Settings: Module Picker

Change module picker settings to control colors in the global page header.

> **Note**
>
> The term "module picker" is outdated. The "module picker" theme settings were originally used to define colors in the main navigation menu. Now, they're only used for buttons, icons, and search field shown in the page header, but not for dropdown menus opened from the page header.
>
> To change the color of menus in the page header, use the *Menus* settings.

Module Picker Theme Settings

Theme Configuration Element Setting	Description
Label text color - default	Defines the color of the text if the user is not interacting with it.
Label text color - hover	Defines the color of the text in the module picker if the user has placed the mouse pointer over the text without selecting it.
Label text color - active	Defines the color of the label if the user is not interacting with it. **Note** This may not work if you are using an application that does not run on SAP UI5
Background color - active	Defines the color of the active module in the module picker.
Background color - hover	This controls the highlighting color when users place their mouse over a module but do not click it.

4.4.3.2.7 Theme Settings: Menus

Change menu settings to control the account navigation menu.

Menus Theme Settings

Setting	Description
Text color - default	Defines the color of the text in the menu if the user is not interacting with it.
Text color - hover	Defines the color of the text in the menu if the user has placed the mouse pointer over the text but not clicked.
Text color - active	Defines the color of the currently active text.
Menu item background color - default	This is the default color of the menu background when the user is not interacting with it.
Menu item background color - active	Defines the color of the active selection in the menu.
Background color - hover	This controls the highlighting color when users place their mouse over a selection but do not click it.

4.4.3.2.8 Theme Settings: Global Navigation

Change the global navigation settings to control navigation bar that's shown on some pages, with tabs you can use to access different parts of the module or feature.

> ⓘ Note
>
> The term "global navigation" **doesn't** refer to the main navigation menu in the page header.
>
> To change the color of button in the page header that displays the name of the module or feature you're using, use the *Module Picker* settings. To change the color of the menu you use to navigate to another area, use the *Menus* settings.

Global Navigation Theme Settings

Setting	Description
Text color - default	Defines the color of the text in the global navigation if the user is not interacting with it.
Label text color - hover	Defines the color of the text in the global navigation if the user has placed the mouse pointer over the text but not clicked.
Label text color - current page	This is the text color of the currently selected page.

Setting	Description
When the Global Header contains no Secondary Navigation, display it at a shorter height.	If a particular module does not need global navigation, and if you select *Yes*, then the global page header compacts slightly to give the user more on-screen space.

4.4.3.2.9 Theme Settings: Portlets

Change the portlet settings to control the colors of "container" elements across the HCM suite.

> **Note**
>
> The term "portlet" is outdated. It originally referred to tile-like elements on past versions of certain pages. Now, the "portlet" theme settings are used in many places, for many other types of rectangular containers, such as dialogs, cards, blocks, and page sections.

> **Caution**
>
> **Be sure to choose text colors that are visible on the background!**
>
> The body background color is **not customizable** for UI elements that use "portlet" theme settings. For themes based on the default Morning Horizon color palette, the body background is white. For themes based on the optional Evening Horizon color palette, it's dark gray.
>
> Most text in "portlet" elements appears in the "body", so choose colors that contrast well with the body background color.

Portlets Theme Settings

Setting	Description
Header text color	Defines the color of text in the header at the top of the UI element.
Header link text color	Defines the color of hyperlink text in the header at the top of the UI element. This is often an *Edit* link.
Header background color	Defines the background color of the header at the top of the UI element, such as a dialog window.
Body text color	Defines the color of text in the body of the UI element.

Setting	Description
Body link text color	Defines the color of hyperlink text in the body of the UI element. This setting is also used for: • Text on the currently selected tab in the navigation bar on some pages (like People Profile) • Text and icon on transparent buttons • Outline color indicating focus on a UI element • Background highlight color indicating focus on a hyperlink
Sidebar text color	Defines the color of text that appears in a sidebar within the UI element.
Sidebar link text color	Defines the color of hyperlink text that appears in a sidebar within the UI element.
Sidebar background color	Defines the color of the space behind the menu items in a sidebar within the UI element.
Dimmed Text Color	Defines the color of text in the UI element that you want to be visually less important. → Tip For example, **field labels** in the body of the UI element use this setting. By default, it's light gray. Choose a "dimmed" or more "muted" color for this setting so that the user's attention is drawn more to the **value** of the field and less to its label.
Alert Text Color	Defines the color of text in a UI element that you want to make the most visually important.
Callout Text Color	Defines the color of text in a UI element when you want to make it visually important, but not as important as alert text.
Custom 1 Text Color	This is a custom text color for some UI elements. It's rarely used and most customers don't need it.
Custom 2 Text Color	This is a custom text color for some UI elements. It's rarely used and most customers don't need it.

Setting	Description
Header button icon	Defines the color of the icon in the header of "portlet" elements on **some** pages. For those pages, you can choose dark gray or light gray. However, on most pages, this setting is **ignored**. → Tip On most pages, the header icon takes its color from the *Header text color* setting instead. Y

4.4.3.2.10 Theme Settings: Home Page (Latest)

Change the home page theme settings to control colors on the home page.

> ⓘ Note
>
> In *Theme Manager*, a "landing page" is a page with a card-based or tile-based experience, such as the home page and the Admin Center homepage. You can apply different theme settings to landing pages than are used on other pages.

> → Tip
>
> Changes to landing page tile settings aren't visible in *Theme Preview*. To preview them, save your changes and use the *Try it Out* function instead.

Home Page (Latest) Theme Settings

Setting	Description
Desktop banner image	Use this option to display a different banner image to different groups in your organization, based on division, department, or location. • Select *Default* to use the banner images configured on the *Manage Banner Images* page. • Select *Upload an image* to upload a banner image. The image uploaded in *Theme Manager* overrides the one configured on the *Manage Banner Images* page, for groups that see that theme.
Greeting text color	Defines the color of greeting text (such as "Good morning!") on the home page.
Quick action background color	Defines the color of quick action tiles on the home page.
Quick action text and icon color	Defines the color of the text and icon used on quick action tiles on the home page.

Setting	Description
Custom card icon color	Defines the color of icons on custom cards with the type *Icon (Small)*
Custom card icon background color	Defines the color of the background for icons on custom cards with the type *Icon (Small)*
Card icon color	Defines the color of icons used on cards on the home page.
Card link color	Defines the color of hyperlink text used on cards on the home page.
Card button border and text color	Defines the color of button border and button text on cards on the home page.
Card button hover color	Defines the color of buttons on the home page when you hover or focus on them.

4.4.3.2.11 Theme Settings: Landing Page Tiles

Change the landing page tile settings to control tiles on landing pages, such as the legacy home page.

> **⚠ Restriction**
>
> *Landing page tiles* theme settings are only used by the legacy home page. To change the color of text, quick actions, and cards on the home page, use *Home Page (Latest)* settings.

> **ⓘ Note**
>
> In *Theme Manager*, a "landing page" is a page with a card-based or tile-based experience, such as the home page and the Admin Center homepage. You can apply different theme settings to landing pages than are used on other pages.

> **→ Tip**
>
> Changes to landing page tile settings aren't visible in *Theme Preview*. To preview them, save your changes and use the *Try it Out* function instead.

Landing Page Tiles Theme Settings

Setting	Description
Body background color	Defines the color of the background in the body of the tile.
Border color	.
Border opacity	.
Header text color	

Setting	Description
Tile body text color	Defines the color of plain text in the body of the tile. For to-do tiles, it's the color of the to-do count when it's not any of the Neutral, Alert, or Critical colors.Defines the color of the text in the banner at the top of the tile.
Icon color	.
Neutral text color	Defines the color of the to-do count when a task is due anytime.
Alert text color	Defines the color of the text in the banner at the topDefines the color of alert text, the most important text on a tile. For to-do tiles, it's the color of the to-do count when a to-do is overdue, due today, or due tomorrow.
Critical text color	Defines the color of the to-do count when a to-do item is due after tomorrow but within a week.
Progress indicator color	.

4.4.3.2.12 Theme Settings: V12 Tiles

Change the V12 tile settings to control tiles on the V12 Home Page.

> ⚠ Caution
>
> These theme settings are obsolete. They were used by a previous version of the home page that is no longer supported.
>
> Although they're still visible in the *Theme Manager*, they shouldn't be used.

V12 Tile Theme Settings

Setting	Description
Header text color	For a standard V12 tile, Defines the color of the text in the banner at the top of the tile.
Header link text color	For a standard V12 tile, Defines the color of the hyperlink text in the banner at the top of the tile. This is often an Edit link.
Header background color	For a standard V12 tile, Defines the color of the banner at the top of the tile.
Header icon scheme	For a standard V12 tile, Defines the color of the icon in the header. You can choose dark gray or light gray.
Tile body text color	For a standard V12 tile, Defines the color of plain text in the body of the tile.
Link color	For a standard V12 tile, Defines the color of hyperlinks of text in the body of the tile.

Setting	Description
Body background color	For a standard V12 tile, Defines the color of the background in the body of the tile, under the header.
Body icon scheme	For a standard V12 tile, Defines the color of any icons that appear as a water-mark in the body of the tile. You can choose dark gray or light gray.
Group text color	For a standard V12 tile, this is the text color for a grouping mechanism inside the tile. The groups are like sections of a tile and are often delineated by a bar with text in it. Defines the color of that text.
Group background color	For a standard V12 tile, this is the background for a grouping mechanism inside the tile. The groups are like sections of a tile and are often delineated by a bar with text in it. Defines the color of that bar.
Tile body highlight color	For a standard V12 tile, Defines the color of text that you want to highlight for the reader. It is the most important text on the tile.
Accent header text color	For the accent tile, which is a way to draw users' attention to this tile more than others, Defines the color of the text in the banner at the top of the tile.
Accent header link text color	For the accent tile, which is a way to draw users' attention to this tile more than others, Defines the color of the hyperlink text in the banner at the top of the tile. This is often an Edit link.
Accent header icon scheme	For the accent tile, which is a way to draw users' attention to this tile more than others, Defines the color of the icon in the header. You can choose dark gray or light gray.
Accent body text color	For the accent tile, which is a way to draw users' attention to this tile more than others, Defines the color of the text in the body of the tile.
Accent link color	For the accent tile, which is a way to draw users' attention to this tile more than others, Defines the color of hyperlink text in the header.
Accent body background color	For the accent tile, which is a way to draw users' attention to this tile more than others, Defines the color of body of the tile.
Accent body icon scheme	For the accent tile, which is a way to draw users' attention to this tile more than others, Defines the color of any icons that appear as a watermark in the body of the tile. You can choose dark gray or light gray.
Alert text color	Defines the color of alert text, which is the most important text on a tile, the text you most want your users to read.
Alert badge text color	For a standard V12 tile, badges are little icons in the left side of the header. Defines the color of the text in that badge.
Alert badge background color	For a standard V12 tile, badges are little icons in the left side of the header. This is the background color of that badge.

4.4.3.2.13 Theme Settings: Primary Buttons

Change primary button settings to control how the most important buttons on the user interface appear to users.

Primary Button Theme Settings

Setting	Description
Text color - default	Defines the color of the text on the primary buttons of the user interface when users are not interacting with the button.
Text color - hover	Defines the color of the text on the primary buttons of the user interface when users pause their mouse over the primary button but do not click the button.
Background color - default	Defines the color of the primary buttons on the user interface when users are not interacting with the buttons.
Background color - hover	Defines the color of the primary buttons of the user interface when users pause their mouse over the primary button but do not click the button.
Border color - default	This is a way to provide depth to the primary buttons on the user interface when users are not interacting with the buttons. The border appears at the bottom of the button.
Border color - hover	This is a way to provide depth to the primary buttons on the user interface when users pause their mouse over the primary button but do not click the button. The border appears at the bottom of the button.
Disabled text color	Defines the color of the text on the primary buttons of the user interface when the buttons are disabled. Buttons are disabled when users cannot click them under the current conditions of the process or the users' permissions.
Disabled background color	Defines the color of the primary buttons of the user interface when the buttons are disabled. Buttons are disabled when users cannot click them under the current conditions of the process or the users' permissions.
Disabled border color	This is a way to provide depth to disabled primary buttons on the user interface. Buttons are disabled when users cannot click them under the current conditions of the process or the users' permissions. The border appears at the bottom of the button.

4.4.3.2.14 Theme Settings: Highlight Elements

Change highlight element settings to control how important, highlighted information is passed to users on the user interface.

> ⚠ Caution
>
> These theme settings are obsolete. They were used by a previous version of the home page that is no longer supported.

> Although they're still visible in the *Theme Manager*, they shouldn't be used.

Highlight Element Theme Settings

Setting	Description
Background color	This is the background of the highlight tile: the center of the tile.
Text color	Defines the color of standard text inside the tile of information that you want to highlight.
Link color	Defines the color of hyperlink text inside the tile of information that you want to highlight.
Header button icon	Defines the color of the button in the highlight tile. The color is for the button when users are not interacting with it. When users pause their mouse on the button but do not click it, the colors reverse. For example, if you select *Dark*, then when users pause their mouse over the button, it is *Light*.

4.4.3.2.15 Theme Settings: Tables and Lists

Change table and list settings to control how tables and some lists appear. (These settings are applied to lists that are essentially one-column tables, where each item is a row.)

Tables and Lists Theme Settings

Setting	Description
Header text color	Defines the color of the text in the column headers that describes the data in the column under it. For example, if the column contained a list of employees, the header text would be “Employee”.
Header background color	Defines the color of the column headers. Select a color that helps emphasize that it is a header - typically darker than the body.
Row background color - default	Defines the color of odd numbered rows. Select a lighter color or white. This color is different from the alternative color to alternate the background of the rows and enhance users' ability to scan the table (or list) horizontally.
Row background color - alternative	Defines the color of even numbered rows. Select a shaded color that is slightly different from the default color. This color is different from the default color to alternate the background of the rows and enhance users' ability to scan the table (or list) horizontally.
Row background color - hover	This is the background color of a row that users' pause their mouse over but do not select. Choosing a good hover color allows readers to use their mouse pointer like their index finger when scanning vertically in the table (or list) .
Row background color - selected	This is the background color of a cell that users click.

Setting	Description
Row background color - disabled	This is the background color of a row that is disabled and the user cannot change.
Cell background color - sorted	This is the background color of odd numbered rows that are sorted. For example, if you sort a list of employee names, the first, third, fifth (and so on) cells in the employee column are this color. The even cells maintain the value of *Row background color - alternative*.
Cell background color - selected and sorted	This is the background color of any cell (odd or even) when its column is sorted and a user selects the cell.

4.4.3.2.16 Theme Settings: Diagrams

Change diagram settings to control how graphic data is presented to the user - especially to highlight out of tolerance values.

Diagram Theme Settings

Setting	Description
Primary Color	This is the primary color of one-dimensional graphic data (for example, an unstacked bar chart).
Text Color	Defines the color of any text that is **not** the title. For example, the scale of the x-axis or y-axis.
Title Color	Defines the color of the text for title of the chart.
Line Color	Defines the color of grid lines on a graph.
Background Color	Defines the color of the background of the graphs. It does not apply to boxes that pop up from the graph when the user interacts.
Positive Threshold Color	Defines the color of data representation (a bar or a line for example) when it has a positive value.
Neutral Threshold Color	Defines the color of data representation (a bar or a line for example) when it has a neutral value.
Negative Threshold Color	Defines the color of data representation (a bar or a line for example) when it has a negative value.
Color Scheme	You can choose a number of colors to represent a scheme. For example, each section of a pie chart is a different color in the scheme.

4.4.3.2.17 Theme Settings: Footer

Change footer settings to control how the legal boilerplate appears at the bottom of each page.

Footer Theme Settings

Setting	Description
Text color	This is the text of the legal boilerplate at the bottom of each page.
SuccessFactors Logo	Defines the color of the logo in the footer.

4.4.3.3 Login Style Theme Settings

Use *Login Styles* settings to apply theming to the login page.

You can customize:

- Login background
- Login logo
- Login button
- Login footer

Theme Settings: Login Background [page 61]
You can customize the background of your SAP SuccessFactors standard login page using the *Login background*.

Theme Settings: Login Logo [page 64]
Change login logo settings to control the logo used on the standard SAP SuccessFactors login page.

Theme Settings: Login Buttons [page 65]
Change login button settings to control the buttons on the standard SAP SuccessFactors login page.

Theme Settings: Login Footer [page 66]
Change login footer settings to control the text and logo in the footer of the standard SAP SuccessFactors login page.

4.4.3.3.1 Theme Settings: *Login* Background

You can customize the background of your SAP SuccessFactors standard login page using the *Login background*.

Login background Settings

You can access *Login background*:

1. Go to *Admin Center* > *Theme Manager* to select the theme you want.

2. Go to *Getting Started* > *Login Styles* > *Login background*.

Login background settings control these elements of your background to your SAP SuccessFactors *login* page:

- Setting up your background to your *login* page specific to your theme.
- About uploading and displaying background image for your *login* page of your theme.

Related Information

Creating a Theme [page 33]

4.4.3.3.1.1 Configuring Your Login Background Image Display

You can set the image for your login background to repeat, its position and overlay options

Procedure

1. Got to *Admin Center* > *Theme Manager* > *Manage Themes* and select the theme you want to customize.
2. Go to *Login Styles* > *Login background*.
3. Select *Upload an image* to upload your image.

   When the *Upload an image* is selected, your image display options appear.
4. To customize your image display options for your login background:

Image display Settings	Instructions
Repeat	You can use this option to control how your login page background image repeats when the size of the header is larger than the size of the image. Go to *Login Styles* > *Login background* > *Image display* > *Repeat* You can select any of these options from the dropdown menu: • Select *Repeat* to create a tiled effect. • Select *Repeat X* to repeat horizontally. • Select *Repeat Y* to repeat vertically. • Select *No Repeat* to show background color if resizing window beyond the size of the image.
Position	To select the vertical and horizontal starting position of the image, go to *Login Styles* > *Login background* > *Image display* > *Position*

Image display Settings	Instructions
	The first dropdown is for horizontal positioning of your image, you can select any of the following: • *Left* • *Center* • *Right* The next dropdown menu is for vertical positioning of your image, you can select any of the following: • *Top* • *Center* • *Bottom* **Example** If you select *Left* and *Top*, your image repeats from the top left corner of the window.
Overlay option	The *Overlay option* controls overlay on top of the login page using the following choices: • None • Dark • Light
Overlay opacity	When you use overlay, you can set its opacity or transparency level. Examples of how opacity settings work: • Lowest opacity level hides overlay and shows the login page background. • Highest opacity level hides the entire login background behind the overlay. **Example** *Dark* overlay option with 100% opacity level appears as black and 100% *Light* overlay appears as white.
Background tpe	You can indicate whether your login background is dark or light. Based on your selection, the color of icons and lines on the page adjust. • Select *Dark* to make icons and lines appear white. • Select *Light* to make icons and lines appear black.

5. To finish, you can either:
   - Preview your changes, by selecting the *Try it out* option.
   - Select *Save* to finish.

4.4.3.3.1.2 About Login Background Settings

You can configure and customize how your SAP SuccessFactors login page appears with your theme.

Login Page Background Settings

Setting	Purpose
Do not change settings	You can select this option to use the default SAP SuccessFactors login page.
Use this theme's settings	You can select this option to use the same background settings used within SAP SuccessFactors pages, as defined in that current theme.
Use solid color	You can select this option if you want a solid background for your SAP SuccessFactors login page. When the *Use solid color* option has been selected, the *Background color* color picker appears. You can select color of your choice here.

4.4.3.3.2 Theme Settings: Login Logo

Change login logo settings to control the logo used on the standard SAP SuccessFactors login page.

> **Note**
>
> Because you can only view the login page by logging out, you cannot preview changes to login style settings using the usual *Try It Out* function. Instead, you can use the *Login Preview* button to preview your saved changes.
>
> If you want to create a completely new login experience for your company, you can also create your own custom login pages. For more information about how to do this, please contact us.

Login Logo Theme Settings

Setting	Description
Use your company logo	Select this option to use the company default logo (either the file uploaded on the *Upload Company Logo* page or a URL configured on the *Company System and Logo Settings* page).
Use SuccessFactors logo	Select this option to display the SAP SuccessFactors logo on the login page. You can choose from several color options: *Default*, *Full color*, *White*, or *Black*.
Upload a logo	Select this to upload a logo image to use on the login page.

4.4.3.3.3 Theme Settings: Login Buttons

Change login button settings to control the buttons on the standard SAP SuccessFactors login page.

> **Note**
>
> Because you can only view the login page by logging out, you cannot preview changes to login style settings using the usual *Try It Out* function. Instead, you can use the *Login Preview* button to preview your saved changes.
>
> If you want to create a completely new login experience for your company, you can also create your own custom login pages. For more information about how to do this, please contact us.

Login Button Theme Settings

Setting	Description
Do not change settings	Select this to use the button style used on the default SAP SuccessFactors login page.
Use this theme's settings	Select this to use the same primary button settings used on application pages, as defined in the current theme.
New style setting	Select this to enter new button settings to use on the login page.
New style setting > *Text color - default*	Defines the color of the button text on the login page when users are not interacting with the button.
New style setting > *Text color - hover*	Defines the color of the button text on the login page when users pause their mouse over a button but do not click it.
New style setting > *Background color - default*	Defines the color of the buttons on the login page when users are not interacting with the buttons.
New style setting > *Background color - hover*	Defines the color of the buttons on the login page when users pause their mouse over a button but do not click it.
New style setting > *Disabled text color*	Defines the color of the button text on the login page when the buttons are disabled. Buttons are disabled when users cannot click them under the current conditions of the process or the users' permissions.
New style setting > *Disabled background color*	Defines the color of the buttons on the login page when the buttons are disabled. Buttons are disabled when users cannot click them under the current conditions of the process or the users' permissions.

Related Information

Creating a Theme [page 33]

4.4.3.3.4 Theme Settings: Login Footer

Change login footer settings to control the text and logo in the footer of the standard SAP SuccessFactors login page.

> **Note**
>
> Because you can only view the login page by logging out, you cannot preview changes to login style settings using the usual *Try It Out* function. Instead, you can use the *Login Preview* button to preview your saved changes.
>
> If you want to create a completely new login experience for your company, you can also create your own custom login pages. For more information about how to do this, please contact us.

Login Footer Theme Settings

Setting	Description
Color scheme	Defines the color of the text and logo that appear in the.footer of the login page. • Select *Dark* to use black text and logo. • Select *Light* to use white text and logo.

Related Information

Creating a Theme [page 33]

4.4.3.4 External User Styles in Themes for SAP SuccessFactors Learning

External user style theme attributes control the Learning Marketplace experience in SAP SuccessFactors Learning.

When users browse for Learning Marketplace courses, they browse in their storefront, which is built in SAP Hybris. When they launch courses, however, the course is served from SAP SuccessFactors Learning. The frame around the course content is controlled by external user style themes. You set the external user style themes so that users have a seamless look and feel from the storefront to the launch of online content.

Editing Favicons [page 67]
You can use Theme Manager to configure and upload images for the *favicon* you want. There's an option to use the standard SAP SuccessFactors logo or upload a new one.

Editing Your Footer Logo And Text [page 67]
You can use Theme Manager to configure and upload images and custom text for your footer. There's an option to use the standard SAP SuccessFactors logo or upload a new one.

Verifying External User Theme [page 68]
You can log in as an external user to verify that your new theme are as an internal employee. You can verify text, show version information, and languages for your footer.

4.4.3.4.1 Editing Favicons

You can use Theme Manager to configure and upload images for the *favicon* you want. There's an option to use the standard SAP SuccessFactors logo or upload a new one.

Context

Before proceeding, note that there are restrictions using *favicon* images:

- Only .jpg, .jpeg, .png, .gif files are accepted.
- The *File Uploader* may crop your *favicon* from the center bottom if your file is too large.

Procedure

1. To upload a new image for your favicon, go to *Admin Center* > *Theme Manager* > *External User Styles* > *Upload a favicon* >.

   This opens up a *Choose File* browse dialog.
2. Select *Browse* to select your favicon from your hard drive.
3. Select *Upload* to finish.

4.4.3.4.2 Editing Your Footer Logo And Text

You can use Theme Manager to configure and upload images and custom text for your footer. There's an option to use the standard SAP SuccessFactors logo or upload a new one.

Context

Before proceeding, note that there are restrictions using images for footer logos:

- Only .jpg, .jpeg, .png, .gif files are accepted.
- The accepted size for the external theming logo is 185 pixels in width and 34 pixels in height. The *File Uploader* crops any images larger than these dimensions.

Procedure

1. To Upload your Footer logo:

a. To upload a new image for your *Footer logo*, go to *Admin Center* > *Theme Manager* > *External User Styles* > *Upload a logo* >.

   The *Choose File* browse dialog opens up.

b. Select *Browse* to select your logo image from your hard drive.

c. Select *Upload* to finish.

2. To insert custom text into your *Footer logo*:

   a. *Admin Center* > *Theme Manager* > *External User Styles* > *Footer text* >.

   b. Expand the *Footer Text* section and add your custom text.

      You can include HTML markup in the text.

      > Example
      >
      > "Company Website".

   c. Enter in this macro exactly as it is written `"<!-- showVersionInfo -->"` for the version information that appears as part of your logo text.

   d. Select the *Globe* icon near the *Footer Text* to launch the *locale editor*.

   e. Enter in your footer text in the box for the language you want.

4.4.3.4.3 Verifying External User Theme

You can log in as an external user to verify that your new theme are as an internal employee. You can verify text, show version information, and languages for your footer.

Procedure

Log into *External User Login* page.

Verification Steps for External Users

External User Styles Section	Verification Steps
Footer Text	You can verify by spot checking your pages. 1. Check every page to verify that your footer text appears correctly. 2. Verify that all html links included in your footer work. 3. Go to your footer and select the *Show version information* to verify that the version info dialog box.

External User Styles Section	Verification Steps
Locale Languages	1. Change external users language to one of the languages you added footer text. 2. Verify that the language matches the footer text. 3. Go back to *Admin Center* > *Theme Manager* > *External User Styles* > *Footer text* >. 4. Select the *Globe* icon near the *Footer Text* to launch the *locale editor*. 5. Change the languages for the external user to one that DOES not have a footer entry for this theme. 6. Log back into the system as an external user, and check to see if the footer text falls back to the default language. → Remember Default language unless otherwise specified is English.

> **Note**
>
> If you want to test this theme as an internal employee, verify that the standard default copyright text is displayed in the footer.

4.5 Assigning a Guest Library to a Site

You can allow people in your extended enterprise to access a site and browse an SAP SuccessFactors Learning library as guests. Although you can't assign a library directly to a site, you can do it indirectly. Guests don't need to log in as Learning-only user to browse the library.

Prerequisites

Set up at least one site to use for guest access to your Learningcourses.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration* > *Sites* >.
2. Search for and open the site that you want to create the library assignment for.
3. In *Summary*, look at the values of *Default Security Domain ID* and *Default Organization ID*.

4. Go to *Manage User Learning* > *Assignment Profiles* and then click *Add New*.
5. In the new assignment profile, click *Rules*.
6. Click *Add Security Domains*, type the security domain that you found from the sites in *Keyword* and then click *Search*.
7. Select the security domain from the site and then click *Add*.
8. In *Set up Rules*, type **`Find Users by Default Org`** in *Untitled Rule 1*.
9. In *Select Attribute*, select *Organization ID*.
10. In the operator list, select *Matches*.
11. In the value box, type the ID of the organization from the sites list.
12. Click *Save* and then close the rules window.
13. In *Libraries*, add the library that these users (the guest users of the site) should see.
14. Execute changes for the assignment profile.

5 Overview of Approval Process for Self-Registration

You can use an approval process to verify that people who register for a Learning-only account are valid members of your extended enterprise. This process has specific steps and requires someone in your company to approve each person before they can access SAP SuccessFactors Learning.

You can enable people in your extended enterprise to create their own accounts to access SAP SuccessFactors Learning. These people can create their account through a basic access URL or through site. For people creating accounts through a basic access URL, you can require approval before granting access to Learning. For people creating accounts through sites, you can choose to control access either through an approval process or through registration codes. For basic access, the decision is made for all users. For site access, the decision is made for each site.

The approval process for self-registration uses the standard approval process framework, and it works as follows:

1. When a person submits the self registration form, from either the basic access URL or through a site, the process begins.
2. The next time the *Set Account Request Approval Process* automatic process runs, it matches pending user requests with an approval process.
   - The automatic process can match users through an assignment profile that you've created. For example, if the users are in North America, they might follow one process (assigned through an assignment profile) and if the users are in Europe, the users might follow a different process.
   - If the system can't find an assignment profile to match users to an approval process, it falls back to the default assignment profile, set in *System Administration* > *Configuration* > *Global Application Settings* > *Approval Process Settings*. Assignment profiles are optional. If you would like all users to use the same approval process, you can set a default process and ignore assignment profiles.
   - If the system finds two assignment profiles that match the user to two different approval processes, the last one found is assigned. You can't control which process runs last, so don't design assignment profiles where two different assignment profiles can match the same user.
   - If you have set up the *User-Created Account Approval Reminder* automatic process, the system sends reminders on an ongoing basis to make ensure that approvers process the requests.
3. At the end of the approval process, the user is notified that the account request is approved or denied.
   - If the user is approved, a Learning-only user account is created and the user receives an email with login instructions.
   - If the user is denied, they receive an email that their request is denied.

Related Information

Advice for Creating Approval Processes for Self-Registration [page 72]
Creating Self-Registration Approval for Basic Access [page 11]
Creating Self-Registration Approval for Sites [page 27]
Scheduling the Set Account Request Approval Process [page 75]

Creating Automatic Account Reminders for User-Created Accounts [page 76]
Approving Account Requests as an Administrator [page 77]

5.1 Advice for Creating Approval Processes for Self-Registration

When creating an approval process for self-registration, consider that the approvals are for users who aren't yet in the system.

We recommend the following when you're creating an approval process for use with self-registration:

- **Don't** use default approval roles like Supervisor Level 1 or Employee. Because the person seeking approval isn't yet an active user in the system, they don't have the relationships (like a manager relationship) that the default approval roles require. Instead, use custom approval roles.
- When creating self-registration approval processes for sites, assign the site a default organization and a default security domain. Custom roles require that an approver is a member of a security domain or organization. The person seeking approval for a site will be originally assigned to the site's default security domain and organization. You choose security domains or organizations in global application settings.
- When creating self-registration approval processes for the basic login page, be sure that your approval roles use the PUBLIC security domain. Users who are waiting for self-registration approval are in the PUBLIC security domain until they're active in the system (when the security domain can be changed). For basic login page self-registration approval processes, approval roles **can't** use organizations as their control entity. You set the control entity in *System Administration* > *Global Application Settings* > *Approval Process Settings* > *Control Entity for Approval Role*.
- If you can't use custom approval roles, then directly assign a specific user in all approval steps in your approval process. You might also create the understanding with this user that if they can't keep up with all self-registration requests, administrators can assist through *User Account Requests*.

5.2 Self-Registration Approval Notes

The approval process to register for an SAP SuccessFactors Learning account has unique behavior.

- Account requests aren't stored in the same location as active users until the account request is approved.
- Any place where users are added (connectors, data import, or the administration environment) applies its validation rules to both the active users and users pending approval. For example, if you attempt to add a user with the user name jdoe, the system checks the uniqueness of the user ID in both existing, active users and also in the list of pending user requests. If it finds jdoe in either place, you see a validation warning telling you that the user ID must be unique.
- When self-registration requires approval, the standard self-registration email notification is suppressed. Users receive an email notification when their account request is approved or denied.
- Approvers in self-registration approval process see the registration form so that they can check the user making the request. The default form contains contact information, so the approver can contact the requester if necessary.

- Administrators can unblock self-registration processes in *People* > *User Account Requests*.

5.3 Creating Approval Processes

Create an approval process to require that users seek approval for requests.

Prerequisites

Configure the global behavior of your approval processes in *System Administration* > *Configuration* > *Global Application Settings* > *Approval Process Settings*.

If your approval process uses custom roles, create the custom roles. Go to *References* > *System Administration* > *Approval Roles*.

Context

In many places in SAP SuccessFactors Learning, you can want users to seek approval for something. For example, you can want users to seek approval to enroll or withdraw from a course. You set up an approval process to define how the user must seek the approval.

Procedure

1. Go to *References* > *System Administration* > *Approval Processes* and choose *Add New*
2. Complete the basic information of the approval process and choose *Next*.

   The system prompts you to add your first approval step.
3. In *Step Name*, type a step name to describe the first step of the approval process.

   Step names are visible to the user and localizable (translatable). For example, if the first step in an approval is for the manager to approve the request, the name could be “Manager Approval”.
4. Add an approval role or a user to the approval step.
   - In most cases, you want to add an approval role. An approval role is an alias for an actual user. For example, the approval role of Manager Level 1 dynamically routes the employee's approval request to his or her own manager. Add the approval role in the *Approval Role ID* box.
   - In some cases, you want to add a particular user. For example, if you’re a small company with a small external site and you want all site login requests to go to the same user, you can provide that user's ID in the *User ID* box.
5. For each additional step in the process, choose *Next Step* and repeat the actions of adding a step name and approver.

6. When you're finished adding steps, choose *Finish*.

Next Steps

If this is the default approval process for your company, assign the approval process to the default processes in Global Applications Settings. Go to *System Administration* > *Configuration* > *Global Applications Settings*.

Assign the approval process to particular learning items or through an assignment profile. Go to *Learning Activities* > *Items* or *Users* > *Assignment Profiles*.

5.4 Assigning Self-Registration Approval Processes with Assignment Profiles

Use assignment profiles to require some people to use one approval process when they self-register and other people to use a second approval process when they self-register.

Prerequisites

- Create an approval process. Go to *References* > *System Administration* > *Approval Processes*.
- Create an assignment profile. Go to *Manage User Learning* > *Assignment Profiles*.

Context

This is optional. A simpler configuration of self-registration approval processes is to funnel all requests for approval to a single process. You can use assignment profiles if you want to use one approval process for site registration and a separate approval process for basic login registration. You create approval processes and assignment profiles for each type of registration and then associate the desired approval process with each assignment profile.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Find and open the assignment profile that you created to pool your users for the approval process.
3. Go to *User-Created Account*.

4. In *User-Created Account Process ID*, select the approval process that should be applied to the users in the assignment profile.

Next Steps

Configure a background process to associate approval processes with pending user-created account requests. Go to *System Administration* > *Automatic Processes* > *Set Account Request Approval Process*.

Optionally, configure reminders to go to users who haven't yet approved user-created account requests. Go to *System Administration* > *Automatic Processes* > *User-Created Account Approval Reminder*.

Related Information

Creating Self-Registration Approval for Basic Access [page 11]
Creating Self-Registration Approval for Sites [page 27]
Scheduling the Set Account Request Approval Process [page 75]
Creating Automatic Account Reminders for User-Created Accounts [page 76]
Approving Account Requests as an Administrator [page 77]

5.5 Scheduling the Set Account Request Approval Process

Configure SAP SuccessFactors Learning to associate account requests to become Learning-only users with an approval process so that requests are routed to an approver.

Prerequisites

Create an approval process for account requests to follow when people request a Learning-only account. Go to *References* > *System Administration* > *Approval Process*.

Configure an assignment profile to define how the account requests are assigned to an approval process. Go to *Manage User Learning* > *Assignment Profiles*.

Context

If you decide that people in your extended enterprise who self-register need to go through a configured approval process to gain access to Learning, you need to define the process. You can select a default approval process for

all self-registered accounts, or you can create assignment profiles to direct pending user requests to a specific approval process. When the *Set User Account Request Approval Process* automatic process runs, it looks to match the request with an assignment profile and then applies the approval process defined on the *User-Created Account* tab for that assignment profile. If there are multiple assignment profiles that match, it applies the last one it finds. If no assignment profiles match, it applies the default approval process. If you don't schedule the *Set User Account Request Approval Process* automatic process, an approval process isn't assigned and account requests remain in a pending state.

Procedure

1. Go to *System Administration* > *Automatic Processes* > *Set User Account Request Approval Process*.
2. Schedule the automatic process using the fields in the *Schedule* area.
3. Click *Apply Changes*.

Next Steps

Schedule the reminder process so that approvers receive reminders that they're part of an active approval process for user-created accounts. Go to *System Administration* > *Automatic Processes* > *User-Created Account Approval Reminder*.

5.6 Creating Automatic Account Reminders for User-Created Accounts

Create automatic account reminders for user-created accounts so that users who need to approve account requests are notified of the task.

Prerequisites

Create an approval process for account requests to follow when people request a Learning-only account. Go to *References* > *System Administration* > *Approval Process*.

Configure an assignment profile to define how the account requests are assigned to an approval process. Go to *Manage User Learning* > *Assignment Profiles*.

Procedure

1. Go to *System Administration* > *Automatic Processes* > *User-Created Account Approval Reminder* >.
2. Schedule the automatic process using the fields in the *Schedule* area.
3. In *Maximum email notifications*, set the maximum number of notifications for each request to be sent to an approver.

   If the number of notifications sent to an approver exceeds the maximum, the request is still active, but the system no longer sends messages. If you don't provide a value, there's no maximum: the approver receives reminders indefinitely.
4. In *Reminder period*, set the number of days that the system should wait before resending a reminder.

   Set a reminder period so that approvers don't receive an email each time the process runs. You can set the process to run daily, for example, but set a reminder period of seven days. Although the system runs daily, approvers see a reminder once a week.
5. Click *Apply Changes*.

Example

If you schedule the process to run daily, set the maximum notifications to three and the reminder period is set to seven, then when the process runs, it looks for requests that are still unapproved after seven days and it sends a reminder to the approver. After it sends three reminders, it stops sending reminders.

5.7 Approving Account Requests as an Administrator

As an administrator, you can approve account requests that are stuck in the approval process.

Context

You can require people who request SAP SuccessFactors Learning accounts to go through an approval process. If the process stalls at an approval step, you can step in as an administrator to approve the requests and grant access to the users.

Procedure

1. Go to *People* > *User Account Requests* > and search for the user requesting the account.
2. Click *Registration Data* to see the form that the user completed to request the account and to make sure that you are approving the correct request by the correct user.

3. When you find the correct user, click *Edit Approval*.

   The *Edit User Approvals* page shows the separate steps of the approval. You can approve a single step or all steps in the process. In many cases, you need only to approve a single step. For example, if the person responsible for one step is on vacation or leave, but the people responsible for later steps are still present, then you can approve the step blocked by the employee on vacation or leave. The process continues to later approvers as if the person on vacation or leave approved the step.
4. Approve or deny the relevant steps in the process with the *Approve* or *Deny* buttons.

   > → Tip
   >
   > Type comments in the *Comments* box for the audit trail. For example, you could type "Approver is on leave, but spoke to her manager. Manager said to approve".
5. Click *Apply Changes*.

Next Steps

If you must approve many of these, consider rethinking your approval process for user-created accounts. You can revisit any of these steps:

- You can change how users are associated with approval processes in *Users* > *Assignment Profiles* > *User-Created Accounts*.
- You can change the reminder frequency to remind approvers of pending approvals more often or for longer periods. Go to *System Administration* > *Automatic Processes* > *User-Created Account Approval Reminder*.
- You can edit the approval processes to simplify them. Go to *References* > *System Administration* > *Approval Processes*.

5.8 SAP SuccessFactors Learning Approval Roles

A Learning approval role is a group of users who have similar approval responsibilities. The users are assigned to a role and the role is then assigned to approval processes.

The group of users in an approval role are all held responsible for the same approval step in an approval process. For example, you can create an approval role called "IT Training Approvers". Users in this role are all responsible for approving IT Training. You can then create an approval process that routes approvals to enroll in IT training classes to this group of users.

You can use the default approval roles or create custom approval roles. When possible, use the default approval roles. When you use default approval roles, you need less configuration of your system, including a less strict security domain or organization structure. Use custom approval roles if you have a strict organization or security domain structure and you can't use the default approval roles. Custom approval roles are also commonly used in the approval process for self-registration for Learning sites.

Default Approval Roles

SAP SuccessFactors Learning installs with several default approval roles. We recommend that you use default approval roles when possible to simplify your configuration. When you include one of these roles in your approval process, you do not need additional configuration:

- Employee: The employee himself or herself. You might have an approval process for the employees to acknowledge enrollment requests before they are forwarded to managers.
- Manager Level 1: The person in this role is always the employees' immediate manager.
- Manager Level 2: The person in this role is the second level manager (the employees' managers' manager).
- Instructor: This is for the E-signature Process only. We do not expect that the approval will be sent to the instructor upon registration.
- HRBP: A Human Resources Business Partner (HRBP) to share some of the managerial responsibilities with a manager.

Custom Approval Roles

Custom approval roles require additional configuration so that the system knows where to route the approval. Users inhabit custom approval roles at run time under the following conditions:

- A user makes a request and the request is associated with an approval process. For example, a user requests to enroll into a learning item, and that learning item has an enrollment approval process.
- The approval process has an approval role that the user belongs to. For example, a learner requests to enroll into an IT Training course, and the approval process for that learning item includes an approval role called “IT Training Approvers”. If a user is in that “IT Training Approvers” role, he or she can be an approver.
- The learner seeking approval is a member of the domain or organization that the user in the approval role controls.
  For example, two users can both be in the “IT Approvers” role, but controlling two different organizations, like SALES and FINANCE. Learners from the sales organization who request approval are routed to the person who controls SALES approvals and learners from the finance organization who request approval are routed to the person who controls FINANCE approvals.

5.9 Learning Approval Process Global Application Settings

Change Learning approval process global application settings to affect how the Learning product behaves when users request things that require approval.

Variable	Description
External Submission Default Process ID	The default approval process associated with external learning requests (SF-182 forms). If the user can’t be pooled into their own approval process, the system uses this one when they submit the request.

Variable	Description
External Verification Default Process ID	The default approval process associated with verifying that a user attended the external learning request (SF-182) training.
Enable External Submission User Message	When you select this, a message is sent when external submissions are made.
External Submission User Message	The message that appears to users when they submit an external training request.
Default Internal Approval Process ID	The approval process ID associated with internal training requests. If a unique approval process can't be found, the system falls back on this process for internal training requests.
Control Entity for Approval Role	The control entity for approval processes determines how the system looks up the user who should receive approval requests when an approval role has multiple users in it. Each approver is responsible for one or more organization or domain's approvals in that role. If your company's org structure is defined by organizations, then choose *Organizations*. If it is reflected in your domains, choose *Domains*. For example, two users can both be in the "IT Approvers" role, but controlling two different organizations, like SALES and FINANCE. Learners from the sales organization who request approval are routed to the person who controls SALES approvals and learners from the finance organization who request approval are routed to the person who controls FINANCE approvals.
Suppress final approval email notification for Registrations	When you select this, the system doesn't send out a final approval email when users register for courses.
Suppress final rejection email notification for Registrations	When you select this, the system doesn't send out a final rejection email when users register for courses.
Default User-Created Account Process ID	The default approval process for when users request an account from the home page of the application or a site. If a user can't be grouped into a different approval process through an assignment profile, the system falls back on this process.

6 Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning

Use the Data Privacy Consent Statements (DPCS) life cycle in SAP SuccessFactors Learning if your company seeks consent from users to store personal information.

Procedure

1. Familiarize yourself with your local data privacy laws. After you know how you are legally required to process personal data at your company, you'll have a better understanding of your need for consent statements.
2. If you learn that you need consent statements, write new consent statements or locate your current consent statements and save them as PDF files.

   > **Note**
   >
   > We recommend that you create one PDF file for each SAP SuccessFactors Learning locale that you support so that users can read the statement in their native languages.

3. When you have new consent statements, add them as draft consent statements.
4. When you are ready to promote the new consent statements to your users, publish them.
5. After you have published at least one set of consent statements, enable them for either internal or Learning-only users.
6. Periodically, review the consent statements.

View and revoke consent statements in SAP SuccessFactors Learning if you previously accepted a consent statement but you changed your mind.

6.1 Supported Configurations for Consent Agreements in SAP SuccessFactors Learning

Consent agreements support most configurations for the ways that users sign in to SAP SuccessFactors Learning, but they do not support all configuration.

Summary of Supported Configurations for Consent Agreements

When you enable consent agreements, they are supported in most scenarios **except** when SAP SuccessFactors Learning is integrated with platform but when users are allowed to sign to Learning in through the basic access URL.

Detail of Supported Configurations for Consent Agreements

In the following table, the columns have the following meanings:

- Sign In Method: The sign-in method can be either Platform or Learning-only users. It refers to the page that users sign into when they want to use SAP SuccessFactors Learning. Platform sign-in pages are the most common and give the user access to SAP SuccessFactors. A few customers, however, still allow users to log in through the basic Learning login page or through a site login page.
- User Type: Internal users are employees in your organization or company. External users are part of your extended enterprise and not employees. They access Learning sites for courses.
- User Exists in Platform: A few platform customers continue to create users in Learning as Learning-only users. These users are not known to SAP SuccessFactors Platform.
- Consent Enabled: Is consent agreements enabled for the organization or company?

Sign In Method	User Type	User Exists in Platform	Consent Enabled?	Details
Platform	Internal	Yes	No	External learners cannot sign in from the platform sign-in page.
Legacy Plateau *Login*	Internal	No	Yes	Not supported
Legacy Plateau *Login*	Internal	Yes	Yes	Not supported

Sign In Method	User Type	User Exists in Platform	Consent Enabled?	Details
Legacy Plateau *Login*	External	No	Yes	Some platform customers created external users before platform integration was enabled for sites.

6.2 Adding Data Storage Consent Statements to SAP SuccessFactors Learning

Add data storage consent for SAP SuccessFactors Learning if your data privacy and protection policies require that users consent to your storage of their personal data.

Prerequisites

Before you upload consent statements, create the consent statements with your legal team and then translate them into each language (locale) in your Learning system. Save the consent statements as PDF files.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *Consent Statements*.
2. Choose + *Add Statement*.
3. In *Title* type a title to help you and your users understand the consent statement.

   For example, type **`Consent to Store Personal Data`**.
4. In *Title*, click the localization icon *Open localization popup* to translate the title into all available languages.

   Title is the label for the consent statement when presented to users.
5. In *Document Links*, choose + *Add Document Links*.
6. In *Add Document Links*, select the language of the consent statement in *Locale* and then choose *Browse* to find and upload the consent statement.
7. Choose *Upload*.
8. For each additional language in your system, choose + *Add Document Links* and repeat the process to upload translated copies of the consent statement.
9. Choose *Save as draft*.

> **Note**
>
> Although you can choose *Publish* to publish immediately, we recommend that you save it as a draft first. By saving it as a draft, you can see draft, published, and archived statements together before you decide to publish.

10. Choose *Back* < *Back* to go back to the overview of consent statements.

Guidelines for SAP SuccessFactors Learning Consent Statements [page 84]
: When you upload a consent statement to SAP SuccessFactors Learning, it should meet the guidelines for usage.

Deleting Draft SAP SuccessFactors Learning Consent Statements [page 85]
: Delete draft SAP SuccessFactors Learning consent statements when you make a mistake uploading documents and you want to prevent others accidentally publishing bad versions of consent statements.

Personal Data Consent for SAP SuccessFactors Learning [page 85]
: Personal data consent, which is the ability for users to consent to saving personal data in SAP SuccessFactors works differently for Learning than for other parts of SAP SuccessFactors.

6.2.1 Guidelines for SAP SuccessFactors Learning Consent Statements

When you upload a consent statement to SAP SuccessFactors Learning, it should meet the guidelines for usage.

Guideline	Description
Accessible to Screen Readers	We recommend that you create documents that are accessible to screen readers so that users of screen reader technology can understand the text of the consent statement.
Translated	We support multiple languages for consent statements. We recommend that you create a consent statement for each locale that you've enabled in SAP SuccessFactors Learning.
Reviewed and archived	We track the versions of consent documents to match the version of the consent that a user agreed to with the time and date of consent. We don't recommend that you use SAP SuccessFactors Learning for the revisions of documents that you pass, for example, among your legal team to develop consent forms. Instead, we recommend that you follow your company process and that you archive according to your company policy.

Parent topic: Adding Data Storage Consent Statements to SAP SuccessFactors Learning [page 83]

Related Information

Deleting Draft SAP SuccessFactors Learning Consent Statements [page 85]
Personal Data Consent for SAP SuccessFactors Learning [page 85]

6.2.2 Deleting Draft SAP SuccessFactors Learning Consent Statements

Delete draft SAP SuccessFactors Learning consent statements when you make a mistake uploading documents and you want to prevent others accidentally publishing bad versions of consent statements.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *Consent Statements*.
2. Click *Draft*.
3. For each consent statement file (language) that you want to delete, click *Delete* 🗑 .

Next Steps

If you deleted an incorrect statement, you usually want to replace it with the correct statement. Go back to the consents page to upload new drafts.

Task overview: Adding Data Storage Consent Statements to SAP SuccessFactors Learning [page 83]

Related Information

Guidelines for SAP SuccessFactors Learning Consent Statements [page 84]
Personal Data Consent for SAP SuccessFactors Learning [page 85]
Adding Data Storage Consent Statements to SAP SuccessFactors Learning [page 83]
Guidelines for SAP SuccessFactors Learning Consent Statements [page 84]

6.2.3 Personal Data Consent for SAP SuccessFactors Learning

Personal data consent, which is the ability for users to consent to saving personal data in SAP SuccessFactors works differently for Learning than for other parts of SAP SuccessFactors.

Personal data consent for SAP SuccessFactors Learning applies, in most cases, to external users: users who access Learning through sites. Internal users are your employees and their consent is usually covered under employment contracts. But if your business needs consent from internal users, we support it.

In SAP SuccessFactors Learning, we simply display the consent documents that you create and record users' agreement to a particular version of the document. Usually with your legal team, you manage the text of the

document, the revision process of the document, and the retirement of a consent document. We recommend that you establish a process for creating and reviewing the consent statements.

Parent topic: Adding Data Storage Consent Statements to SAP SuccessFactors Learning [page 83]

Related Information

Guidelines for SAP SuccessFactors Learning Consent Statements [page 84]
Deleting Draft SAP SuccessFactors Learning Consent Statements [page 85]

6.3 Publishing Consent Statements in SAP SuccessFactors Learning

Publish Data Privacy Consent Statements (DPCS) in SAP SuccessFactors Learning when you're ready to expose them to users for review and agreement.

Prerequisites

Before you can publish consent statements, you add them as drafts to the system.

Context

While statements are in draft, they don't appear to end users. The draft status gives you time to upload the statements, translate the titles of the statements, and so on. When you're ready to expose the statements to users, you publish them.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *Consent Statements*.
2. In *Statements*, click *Published* to see the consent statements that you're about to archive.

   Although this step isn't required, we do recommend it because the statements that are currently published are automatically archived when you publish the draft versions. Make sure that you're ready to archive all published consent statements.

3. Go back to the list of consent statements.
4. Click *Draft*, and then check all draft statements.

   We recommend that you check the draft statements one more time because you're about to expose them to users.
5. Click *Publish*.

   When you click *Publish* to publish draft consent statements, the current published statements are archived and the draft statements replace them. Users who agreed to the last published statements must now agree to the new language (the consent statements that you just published). If they do **not** agree, then they can't access the system.

Related Information

Deleting Draft SAP SuccessFactors Learning Consent Statements [page 85]
Guidelines for SAP SuccessFactors Learning Consent Statements [page 84]

6.4 Enabling SAP SuccessFactors Learning Consent Statements

Enable SAP SuccessFactors Learning to show data storage consent statements to employees or to users of Learning sites (external users).

Prerequisites

Before you enable consent statements, add at least one batch of the statements and publish them. After you've published at least one batch, users can see something when you enable the statements.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *Consent Statements*.
2. In *Application Administration*, decide to enable for internal or external users.

Choice	Description
Enable for Internal Users	Select *Enable for Internal Users* if you want employees to see the consent statement. This choice is uncommon because employees' consent to store data is often handled by other means, such as an employment contract. This choice is relevant for Learning-only users. Integrated customers must add consent statements in SAP SuccessFactors Platform. The *Enable for Internal Users* setting doesn't apply to integrated internal users.
Enable for External Users	Select *Enable for External Users* if you want your extended enterprise to see the consent and if you're using Learning sites.

6.5 Reviewing SAP SuccessFactors Learning Consent Agreements

Review SAP SuccessFactors Learning consent agreements to make sure that you're showing users the correct version.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Admin* > *Application Administration* > *Consent Statements*.
2. In *Statements*, choose *Published* to see the consent agreements that users currently see.
3. Choose *Back* < *Back* to go back to the overview of consent statements.
4. In *Statements*, choose *Draft* to see the consent agreements that you've staged but that aren't yet viewable by users.
5. Choose *Back* < *Back* to go back to the overview of consent statements.
6. In *Statements*, choose *Archived* rows to see the consent agreements that you've archived.

   > → Tip
   >
   > In *Statements*, you can see the date that the archived copies were superseded by a newly published set.

7. Choose *Back* < *Back* to go back to the overview of consent statements.

Next Steps

If you see anything that needs to be changed, upload new copies of consent agreements and republish. You can't revert from archived versions.

6.6 Viewing and Revoking Personal Consent Statements in SAP SuccessFactors Learning

View and revoke consent statements in SAP SuccessFactors Learning if you previously accepted a consent statement but you changed your mind.

Procedure

1. Log in to SAP SuccessFactors and then select *Learning*.
2. Click *Options and Settings*.
3. In *Data Privacy Consent*, click *Data Privacy Consent Statement* to view the consent statement that you accepted.

   The *Data Privacy Consent* section also tells you when you accepted the statement.
4. To revoke your consent, click *Decline*.
5. Contact your system administrator to deactivate or delete your account.

7 After Setting Up Learning for Your Extended Enterprise

After you set up learning for your extended enterprise, you must maintain the users.

Within SAP SuccessFactors Learning, think about how you'll maintain the Learning-only users.

- As you add new units to your extended enterprise (when you sign up a new dealership, new channel sales partner, and so on), you need to create a space in SAP SuccessFactors Learning for the new unit. Depending on how you've designed your extended enterprise, you might need to create new organizations or new sites, or both. We recommend that you write a process for the onboarding of new units and that the process consider how you've structured your extended enterprise.
- Consider creating a process for purging Learning-only users who are no longer part of the extended enterprise units. This should include inactivating users in SAP SuccessFactors Learning
- As you remove units from your extended enterprise, you need a process to offboard them. Depending on how you've structured your extended enterprise, you might need to inactivate one or more sites or organizations.

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