SAP SuccessFactors

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Defining Roles for SAP SuccessFactors Learning

Content

1 Change History

Learn about changes to the documentation for Implementing SAP SuccessFactors Learning Security.

2H 2020 – Present

Type of Change	Description	More Info
None	We did not update this document.	

2 Data Access in SAP SuccessFactors Learning

SAP SuccessFactors Learning data access - including actions you can take on types of data - is in addition to the SAP SuccessFactors Role Based Permissions (RBP) model, so you need to implement it separately.

If you are using other parts of SAP SuccessFactors, then you are accustomed to controlling security access through Role Based Permissions (RBP). Learning, however, uses a different system for security. It uses a combination of user roles, domains, workflows, and restrictions.

When users from the core SAP SuccessFactors system (or any other Human Resources Management System) are imported to Learning, they are matched with a security role that you configure in *System Admin* > *Security* > *Roles*. When in Learning, learners, instructors, and administrators get their access control from their Learning security roles.

> **Note**
>
> When importing data for Learning Assignments or Curricula Assignments authorization permissions are not enforced.

> **Note**
>
> We recommend that you engage an implementation partner to set up your security system.

Related Information

How SAP SuccessFactors Learning Roles Allow and Block Access to Data and Actions [page 64]
Security Personas in SAP SuccessFactors Learning [page 66]
Assigning Roles to SAP SuccessFactors Learning Administrators [page 60]

3 Access Control for SAP SuccessFactors Learning Learners and Instructors

Understand the overall process for creating access control for SAP SuccessFactors Learning end users (learners and instructors) because end users behave differently than administrators.

In most cases, you control what you want learners to **do** with the learner role, and you control what they can **see** in other ways:

- Use course catalogs to limit the courses that users can see and launch
- Use global settings to control what supervisors can see and how they interact with employees. How supervisors interact includes their relationships, which is imported from SAP SuccessFactors platform or a third party Human Resources Information System (HRIS).
- Use masking to hide sensitive personal data from reports and notifications in SAP SuccessFactors Learning.

Generally speaking, you create single roles for all learners and one for all instructors by copying the default roles.

1. Creating a Default Learner Role [page 8]
   Create a default learner role to set the security levels for your learners.
2. Creating Libraries [page 13]
   Create SAP SuccessFactors Learning libraries so that users can search for or browse a subset of all learning opportunities in the Learning Management System (LMS).
3. Creating an Assignment Profile [page 29]
   Create assignment profiles to automatically match users with assignments dynamically, based on their attributes.
4. Learner Security Role Assignment Troubleshooting Tips [page 37]
   To troubleshoot SAP SuccessFactors Learning as an administrator, you want to know how learners are assigned to their security roles.
5. Masking User IDs in SAP SuccessFactors Learning Reports and Notifications [page 41]
   Mask user IDs in SAP SuccessFactors Learning reports so that administrators who see the reports cannot see the user IDs of the users they report on.
6. Hiding User Images in SAP SuccessFactors Learning [page 42]
   Hide user images in Learning if your company policy does not allow users' images to be shown as part of your learning practice.
7. Controlling Managers' View of Employees in Learning [page 43]
   In Learning, managers can see their team members to assign them courses. You can control what the managers see and how they interact with their teams.
8. Editing the Instructional Text on Learning Manager Dashboards [page 44]
   Edit the instructional text on Learning manager dashboards if you have a legacy Plateau implementation and must change the text on manager dashboards.
9. Updating Learning Manager and User Tools [page 45]
   Update Learning manager and user tools to take advantage of new functionality and experiences for users and managers when they add learning history and when managers register or withdraw users or assign or remove learning from users.
10. Controlling When Learners are Notified of Changes to their Learning Assignments [page 46]

If you have a special case that requires special rules, change when users are notified of their learning assignments.

3.1 Creating a Default Learner Role

Create a default learner role to set the security levels for your learners.

Context

A common and simple approach to end user security is to copy the LEARNING_USER role as a template, and then adjust the configuration to apply to all learners. You can take this approach because LEARNING_USER role already has the recommended workflows for your users.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Admin* > *Security* > *Role Management*.
2. Search for LEARNING_USER and open it.
3. Click *Copy Role*.
4. Type **`Default Learner`** for your learner security role.

   We recommend **`Default Learner`** for the name of your security role because this is the security role for users who are only learners, not instructors.
5. Select *Copy Assigned Workflows* and then click *Copy*.

   You now have a duplicate of the LEARNING_USER role called Default Learner. Default Learner has all the security workflows that we recommend for a user who is a learner.
6. In *Workflows*, remove any actions that you do **not** want to allow learners to do.

   For example, you can remove Author QuickGuide to prevent your learners from creating QuickGuides.
7. Click *Apply Changes* when you are finished.

Next Steps

If you want to create different access groups, consider creating a secondary learner role. For example, if you want only some learners to create QuickGuides, you can create a secondary role called QuickGuide Authors. In that role, you can include Author QuickGuide but remove it from the Default Learner role. As a result, users in the Default Learner role cannot create QuickGuides, but users in the QuickGuide Authors role can.

Task overview: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Next task: Creating Libraries [page 13]

3.1.1 Creating a Secondary Learner Role

Create a secondary learner security role to create different permissions for a second group of learners.

Prerequisites

Create a primary learner role.

Context

Most companies can use a single, default learner role. If, however, you have two groups of learners and you want those groups to have different permissions, you can create a secondary user role. For example if you want one group to author QuickGuides but you want to prevent a second group from authoring QuickGuides, you can create a default role which does **not** have the Author QuickGuide role and a secondary role that does have it. Users in the default role are prevented from authoring QuickGuides but users in the secondary role are permitted to author QuickGuides.

> Note
>
> You do **not** need to create a secondary learner role for supervisors or instructors because their privileges are handled separately. Instead, focus on what you want to allow when the user is functioning as a learner (looking up courses, searching learning history, and so on).

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Admin* > *Security* > *Role Management*.
2. Search for LEARNING_USER and open it.
3. Click *Copy Role*.
4. Type a name that describes the secondary security role.

   For example, if the secondary role allows users to author QuickGuides, type **`QuickGuide Authors`**.
5. Select *Copy Assigned Workflows* and then click *Copy*.
6. In *Workflows* remove any actions that you do **not** want to allow learners to do.

7. Click *Apply Changes* when you are finished.

3.1.2 Creating an Instructor Role

Create an instructor role to allow your instructors access to the instructor dashboard.

Procedure

1. Open SAP SuccessFactors Learning administration and go to *System Administration* > *Security* > *Role Management*.
2. Find and open the DEFAULT INSTRUCTOR role.
3. Click *Copy Role*.
4. In *Role ID*, type **`Instructor`**.
5. Select *Copy Assigned Permissions* and then click *Copy*.
6. In *Permissions* remove any actions that you do **not** want to allow instructors to do.

Permission	Description
Access Classes	Allows instructors to see their classes. Without this permission, instructors do not see the dashboard.
Record Attendance	Allows instructors to record attendance for segments in the class. Instructors with this permission can either record attendance through a record attendance wizard in the instructor dashboard or they can scan QR codes (if enabled).
Record Learning	Allows instructors to record the fact that a user completed, passed, or failed a course.
Initiate Evaluation	Allows instructors to begin an evaluation (survey) associated with the course.
Record Learning for adhoc classes	Allows instructors to post learning results when courses have **not** been formally scheduled in the Learning Management System (LMS).
Add Walk-ins	Allows instructors to post learning results for users who have **not** formally registered for a course.
Print Roster	Allows instructors to print the roster for the class.
View Documents	Allows instructors to view documents associated to the class.

At a minimum, add Access Classes to enable the instructor dashboard.

Next Steps

Enable the instructor view for all or individual instructors.

Related Information

[Security Personas in SAP SuccessFactors Learning [page 66]]
[SAP SuccessFactors Learning Security Permissions [page 68]]
[SAP SuccessFactors Learning Security Roles [page 76]]

3.1.3 Assigning the Instructor Role

Assign the Instructor role to instructors to enable them to view the instructor dashboard.

Prerequisites

If the instructor doesn't already have a user ID and password, create it in *People* > *Users* > *Add New* (or import the user through the user connector). The user ID is required because the instructor logs into the instructor view using the **user ID** and password, not the instructor ID.

Security roles control the access of groups of users. For instructors, you must have a role for instructors (as a group of users) and the role must have at least the "Access Classes" permission.

Context

The instructor view gives instructors a dashboard to see the time of a scheduled course, who is scheduled to attend, and where the course is to take place. If you're using Virtual Learning Servers (VLS), instructors can use the instructor view to launch their VLS sessions when the time comes to start the class.

Procedure

1. Go to Learning Administration, and then go to *People* > *Instructors*.
2. Search for the instructor who has access to the instructor view.
3. Go to *Summary*.
4. In the *Role* list, select `Instructor`.

   Instructor is the name we suggest when you create this role, but you can name it differently.
5. In the *Related User* box, select the user that you created in *People* > *Users*.

   The instructor logs in to the user application with the **user ID** and not the instructor ID.

Next Steps

Assign instructors to a related user if they aren't assigned already.

3.1.4 Placing Learning Users into Security Roles

Place Learning users into security roles so that you can limit the users' actions.

Prerequisites

Create a security role for the users in *System Administration* > *Security* > *Role Management*. The security role limits what a set of users can do in the system.

Create an assignment profile in *Manage User Learning* > *Assignment Profiles* and add rules to pool users. The rules create a pool of users that should all get the same security role.

Context

You can use *Manage User Learning* > *Assignment Profiles* > *Role* to change a role for each user who is associated with the assignment profile. Executing changes updates the role in *People* > *Users* > *User Details*. Executing changes can also change a user's access to the user interface depending on the role's permissions. After you add a role to the assignment profile, the role can have one of the following statuses: Valid (the changes to the assignment profile have been executed) and Add Pending (the changes to the assignment profile haven't been executed).

Procedure

1. Go to Learning Administration, and then go to *Manage User Learning* > *Assignment Profiles*.
2. Find and open the assignment profile that pools the users for the security role.
3. Go to *Role* and then select the security role that you want to assign to them in *Role ID*.
4. Click *Save*.

Next Steps

Execute changes for the assignment profile.

Related Information

Assigning the Instructor Role [page 11]
Creating an Assignment Profile [page 29]

3.2 Creating Libraries

Create SAP SuccessFactors Learning libraries so that users can search for or browse a subset of all learning opportunities in the Learning Management System (LMS).

Context

When you build the SAP SuccessFactors Learning LMS, you're building a set of learning items (courses), classes (courses scheduled to take place at a specific place and time), curricula, programs, and other offerings.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Libraries*.
2. Click *Add New*.
3. In *Library ID*, provide a unique ID for the library.
4. In *Description*, type a description that helps others understand the contents of the library.

   For example, if this library contains sales and marketing courses for North America, you can call the library `North American Sales and Marketing`.
5. In *Security Domain*, select a security domain to control **administrator** access to maintain the library.

   User access to the library is controlled by assignment profiles, not by the domain you set here. For example, if your company has learning administrators for North America, you might have a domain called North America. You add the library to the North America domain so that only North American learning administrators can change the contents of the library. For users, however, you might create an assignment profile that looks for users in North America and also looks for users in either Sales or Marketing and then assigns that pool of users to the library so that the North American Sales and Marketing employees can browse and search the library.
6. In *Discount Rate*, select a rate for users who are members of this library.

   > Note
   >
   > If you aren't using commerce features to track transactions, then you can ignore *Discount Rate*. If you're using commerce features, then you probably set up your discount rates during implementation. If not, you can click *Add* ( )to add a new discount rate for this library.
7. In *Contact Email*, type the email of the administrator who is responsible for this library so that other administrators can speak with the owner before making changes.

8. To hide the library while you build it, clear *Active*.

   You can activate the library later when you're ready to expose it to users.
9. Click *Add*.

Next Steps

After you create the library, you can add learning content to it and you can change the way that the learning content behaves. For example, you can add a learning item (a course) to the library and you can feature that course so that users see it prominently when they browse for courses in their libraries.

After you add content, create an assignment profile to assign the library to users.

1. Library Summary Fields [page 15]
   Administrators use the Library Summary fields to manage general information about libraries.
2. Adding Learning Items to a Library [page 16]
   Add learning items to a library from the library view when you want to add many learning items to one library.
3. Adding Curricula to a Library [page 19]
   Add curricula to libraries so that users can browse and search for the libraries.
4. Adding Programs to a Library [page 20]
   Add programs to a library so that users can find and assign themselves programs and managers can assign programs to direct reports.
5. Managing the QuickGuides in a Library [page 20]
   You can manage the QuickGuides that users publish to libraries to curate the list of QuickGuides.
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   Manage the collections in a library to control which users can look up and view collections of links that either an administrator or an end user created.
7. Placing Courses into Featured, New, and Revised Card Categories [page 23]
   Per library, place courses into categories so that when users browse for them, they see the courses' cards in the browsing categories.
8. Setting the Relevance of Libraries' Search Results [page 24]
   Set the relevance of libraries' learning items and curricula to influence the relevancy score of users' searches and move the items and curricula to the top of the list.
9. Setting the Search Tier of Libraries' Search Results [page 25]
   Set the search tier of learning items and curricula in a library so that users can group by search tier.
10. Changing the Price of a Learning Item in a Library [page 26]
    Change the price of a learning item in a library when you want a particular learning item in a particular library to have a price that is different from the default price.
11. Assigning Libraries to Learners [page 27]
    Assign libraries to groups of learners so that learners can browse and search for courses in the library.
12. How SAP SuccessFactors Learning Finds Recommendations for the Recommended for You Library Category [page 28]
    SAP SuccessFactors Learning looks in standard recommendation places to find recommendations for the *Recommended for You* library category.

Task overview: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Previous task: Creating a Default Learner Role [page 8]

Next task: Creating an Assignment Profile [page 29]

3.2.1 Library Summary Fields

Administrators use the Library Summary fields to manage general information about libraries.

Name	Description
Active	When you make an entity inactive, the system doesn't include that entity in any searches or reports by default; however, some searches and reports allow you to override the default so that you can include inactive entities. You might make an entity inactive (rather than delete it) if you no longer want to use it but keep it for a historical record. Because you can't restore a deleted entity, we recommend that you delete an entity only when you make a mistake in some way (for example, if the entity ID is incorrect).
Contact Email	We recommend that you record the e-mail address of the person who maintains or owns the entity so that other administrators have a contact if they need to use or modify the entity.
Description	Because the content of this box doesn't appear in the user interface or any reports, we recommend that you use the box to fully explain to other administrators the purpose for creating this entity.
Discount Rate	You can associate a discount rate with the library so that users can purchase items in the library at a discount. You can edit or create a discount rate in the Discount Rates section (*References* > *Finance* > *Discount Rates*).
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. A security domain is a security attribute of some SuccessFactors Learning Administration entities (but not all entities have security domains). Your security role determines which security domains you can access and which functions you can perform. What an administrator can access and do for an entity depends on how you configured the permission restrictions of the role ID that is associated with the administrator. For more information about how you can configure access to entities, see Security.

Parent topic: Creating Libraries [page 13]

Next task: Adding Learning Items to a Library [page 16]

3.2.2 Adding Learning Items to a Library

Add learning items to a library from the library view when you want to add many learning items to one library.

Prerequisites

When you add learning items to a library, you're simply associating existing learning items with an existing library, so both the library and the learning items must exist already.

Context

Often you know a single library and you want to add many learning items to it. For example, if you added many new networking security learning items, and you want to add them to your information technology (IT) library, you can go to *Learning Activities* > *Libraries*, find the IT library and then add all the network security learning items to the library. If you know one learning item and want to add it to many libraries, then you want to add the learning item to libraries from the learning item view.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Libraries*.
2. Search for the library that you want to add the learning items to, and then edit it.
3. Go to *Items*.
4. Click + *(Add Items)* .
5. Create a search to find the learning items and then click *Search*.
6. In *Add Item to Libraries*, select the *Add* checkbox for each library that should have the learning item.
7. Select *Add Classes* to also add classes based on the learning item.

   When you add classes, users see future classes offered for this learning item when they browse or search for learning. They can enroll into classes, provided that they meet any enrollment rules that you have set up. For example, they might need to seek approval enroll or they could have seats reserved for them.
8. Click the *Add* button.

   In the *Items* tab for *Libraries*, the search bar is enabled when records are present and is used to filter results. Searching for *Items* by title or ID returns relevant results.

Next Steps

Set the library options for each learning item or change their library prices.

Task overview: Creating Libraries [page 13]

Previous: Library Summary Fields [page 15]

Next task: Adding Curricula to a Library [page 19]

3.2.2.1 Adding Categories to Learning Activities

Categories organize learning activities for users so that they are easier to find when users are browsing or searching for learning opportunities.

Prerequisites

Before you can add categories to learning activities, you must first create them in *References* > *Learning Activities* > *Categories*.

Context

Associate learning activities with one or more categories so that users can filter by subject area when they search for learning activities in their course library.

> → Tip
>
> If you are using a connector to add courses to SAP SuccessFactors Learning, then chances are that you are importing them with a category already.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then and go to *Learning Activities* > *Items*.
2. Find and open the learning item (course listing) that you want to categorize.
3. Go to the *Categories* tab.
4. Choose + *Add Categories* to find and select the categories you'd like to associate with the item, then choose *Add*.

Related Information

Creating Course Categories (Subject Areas)

3.2.2.2 Adding Categories to Curricula

Categories organize curricula for users so that they're easier to find when users are browsing or searching for learning opportunities.

Prerequisites

Before you can add categories to learning activities, you must first create them in *References* > *Learning Activities* > *Categories*.

Context

Associate learning activities with one or more categories so that users can filter by subject area when they search for curricula in their course library.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum you want to categorize.
3. Go to the *Categories* tab.
4. Choose + *Add Categories* to find and select the categories you'd like to associate with the curriculum, then choose *Add*.

Related Information

Creating Course Categories (Subject Areas)

3.2.3 Adding Curricula to a Library

Add curricula to libraries so that users can browse and search for the libraries.

Prerequisites

When you add curricula to a library, you're simply associating existing curricula with an existing library, so both the library and the curricula must exist already.

Context

Add curricula to libraries so that users who have access to the libraries can search or browse for the curriculum and add it to their assignments. When users assign the curriculum to themselves, they're automatically assigned learning items that help them fulfill the curriculum.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Libraries*.
2. Find and open the library you want to edit.
3. Click *Curricula* and then click + *(Add Curricula)*.
4. Search for the curricula that you want to add, select them, and then click *Add*.

Next Steps

If you're using force incomplete, consider hiding the individual learning items from the library's users.

Task overview: Creating Libraries [page 13]

Previous task: Adding Learning Items to a Library [page 16]

Next task: Adding Programs to a Library [page 20]

3.2.4 Adding Programs to a Library

Add programs to a library so that users can find and assign themselves programs and managers can assign programs to direct reports.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Libraries*.
2. Find and open the library that you want to manage.
3. Go to *Programs*.
4. Click + *(Add Programs)*.
5. Find the program that you want to add to the library, select the corresponding checkbox, and click *Add*.

Next Steps

Set the library options for the programs you added.

Task overview: Creating Libraries [page 13]

Previous task: Adding Curricula to a Library [page 19]

Next task: Managing the QuickGuides in a Library [page 20]

3.2.5 Managing the QuickGuides in a Library

You can manage the QuickGuides that users publish to libraries to curate the list of QuickGuides.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Libraries*.
2. Find and open the library that you want to manage.
3. Check that *Include User Published Content* is set to *Yes*.

   When *Include User Published Content* is set to *Yes*, users can publish QuickGuides to this library. If it's set to *No*, then users can't publish QuickGuides to this library.
4. Go to *QuickGuides*.

5. For each QuickGuide in the list, you can contact the author to manage the QuickGuide.

Task overview: Creating Libraries [page 13]

Previous task: Adding Programs to a Library [page 20]

Next task: Managing the Collections in a Library [page 22]

3.2.5.1 QuickGuides

QuickGuides are job aids that users can produce and then upload to their learning libraries to share with other users.

A QuickGuide is a collection of steps with pictures and text. Although QuickGuides can cover any subject, they're intended for quick tasks like fixing a paper jam in a copier or transferring a call on an office phone: topics that you might not create a learning item for but topics that some users know and are willing to share with the rest of the organization.

Users can see the QuickGuides that they created in *My QuickGuides*. If they decide to share the QuickGuide with other users, they can publish it to a library. Administrators control who can create quick guides and whether or not they can be published (and if they can be published, the set of libraries that can accept them).

3.2.5.2 Enabling QuickGuides for Users

Enable QuickGuides for users so that your users can create quick how-to content and share it with other members of the company.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Role Management*.
2. Find and open the role whose users should be able to author QuickGuides.

   > → Tip
   >
   > Limit your search by *Role Type*: search for only end-user roles.

3. In *Permissions* add the permission Author QuickGuides.
4. Click *Apply Changes*.
5. Go to *Learning Activities* > *Libraries*.
6. Find and open the libraries where these users should be able to upload their QuickGuides.

   Open libraries that are accessible to the users who are in the role that you just updated.

7. Set *Include User Published Content* to *Yes*.
8. Go to *System Admin* > *Configuration* > *System Configuration* > *LIBRARY* and make sure that catalogSearchCategories[QuickGuide]=true.

Next Steps

To allow users to create QuickGuides with their mobile devices, enable the QuickGuide feature in the SAP SuccessFactors Mobile application.

To change the default settings of QuickGuides, go to *System Admin* > *Configuration* > *System Configuration* > *INCLUDE USER PUBLISHED CONTENT*.

3.2.6 Managing the Collections in a Library

Manage the collections in a library to control which users can look up and view collections of links that either an administrator or an end user created.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Learning Activities* > *Libraries*.
2. Find the library that has the collections you want to manage and then click *Collections*.
3. To add a collection, click + *Add Collections*.
4. To remove a collection, select its *Remove* box and then save.

Task overview: Creating Libraries [page 13]

Previous task: Managing the QuickGuides in a Library [page 20]

Next task: Placing Courses into Featured, New, and Revised Card Categories [page 23]

3.2.7 Placing Courses into Featured, New, and Revised Card Categories

Per library, place courses into categories so that when users browse for them, they see the courses' cards in the browsing categories.

Context

Card categories are a way to highlight types of courses for users when they browse their libraries. For example, you might want to feature some courses that are important at a particular time of year (like accounting courses near tax time) or you might want users to see a category of new courses. You control which courses go into the new, revised, or featured categories by highlighting the course in the library. These categories can also control which courses go into the carousel at the top of the browsing screen. By default, featured courses are in the carousel, but you can configure it differently in *System Administration* > *Configuration* > *System Configuration* > *LIBRARY*.

Users also see the flag and reason on the course information. This helps users understand more fully why you flagged the course.

Procedure

1. Go to SAP SuccessFactors Learning administration, and then go to *Learning Activities* > *Libraries*.
2. Find the library that contains a course or learning experience you want to highlight and then click *Items*, *Curricula*, or *Programs*, depending on what type of learning experience you want to highlight.
3. Click *(Edit)*.
4. In *Highlight As*, select the category you want to use to highlight the library item.
    - If you don't select a value, the course or learning experience isn't added to a category. Users find it by browsing for it by topic or by searching for it by keyword.
    - *New* typically means new to this library. Users see it in the course card category for new courses or experiences.
    - *Featured* means that you want to put it into the featured category. Often, this means that the course is important at a particular time of year or because of a company initiative.
    - *Revised* means that the course isn't new but that it's updated.
5. In *Highlight Until*, select the time at which the highlight category is automatically removed.

    For example, if you want to highlight a course for two months, you can set its category to featured and then remove the category in two months. After two months, the highlight category is removed and the card is removed from the featured card category.
6. In *Reason to Highlight*, type the reason for highlighting the learning item.

    Users see the reason next to the highlight category in the card view. It isn't currently translatable.

Task overview: Creating Libraries [page 13]

Previous task: Managing the Collections in a Library [page 22]

Next task: Setting the Relevance of Libraries' Search Results [page 24]

3.2.8 Setting the Relevance of Libraries' Search Results

Set the relevance of libraries' learning items and curricula to influence the relevancy score of users' searches and move the items and curricula to the top of the list.

Prerequisites

You need a library with learning items assigned to it.

You need access to the Edit Library Search Relevance Booster permission.

> Note
>
> This topic describes features and behavior of legacy search that don't apply to enhanced search.

Context

When users search their library, you might want some learning items to rise to the top of their search. For example, if a library has two learning items, both involving workplace safety, but one is a general safety class and one is specific to the group using this library, you might want to rank the specific one higher than the general one. If a library is assigned to electricians in New York, you want the workplace safety specific to electricians in New York to be higher than a learning item that is for any employee.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Libraries*.
2. Find and open the library that you want to manage.
3. Go to one of the following places that support search relevance.
    - *Items*
    - *Curricula*
    - *Programs*
4. In *Search Weight*, add a relevancy score multiplier.

    SAP SuccessFactors Learning creates a relevancy score each time a user searches. The relevancy score is calculated by a search algorithm. The closer the result to the user's search, the higher the relevancy score.

The *Search Weight* is a multiplier to the relevancy score, so a value of 1 uses the relevancy score that SAP SuccessFactors Learning found. A value of 2 doubles the relevancy score, and so on. When users sort their library search results by relevancy, they don't see the relevancy score on the page, but they're sorting by the weighted relevancy score.

Task overview: Creating Libraries [page 13]

Previous task: Placing Courses into Featured, New, and Revised Card Categories [page 23]

Next task: Setting the Search Tier of Libraries' Search Results [page 25]

3.2.9 Setting the Search Tier of Libraries' Search Results

Set the search tier of learning items and curricula in a library so that users can group by search tier.

Context

Companies often have types of learning items that rank higher than other types of learning. For example, you might want to rank items for certification higher than general knowledge items. With search tiers, you can tag your curricula and learning items in a library with different types of learning. When searching for learning items, users can sort by tier to find the most relevant results.

> ⓘ Note
>
> This topic describes features and behavior of legacy search that don't apply to enhanced search.

Procedure

1. Decide on your tiers by considering how you want to tag your learning items and curricula and how you want users to group.

   You can have up to five tiers, so think of the five most important themes of learning. Then assign the most important to tier 1, second to tier 2, and so on, to tier 5.
2. Go to *References* > *Manage Labels* > *Labels* and search for label IDs that start with **`label.catalog.searchresultsbooster.dropdown.`**.

   You see five results, each representing one of the five search tiers. For example, `Tier1DisplayValue` represents tier one and `Tier2DisplayValue` represents tier 2.
3. For each of the five tiers, click the *Edit* button, go to the *Locales* tab, and type the name of the search tier for each language.

   If your top search tier is "Courses for Certification", click the edit button for `Tier1DisplayValue`, go to the *Locales* tab, and type **`Courses for Certification`** in the *English Label Value* box. For each additional language, type the translation of “Courses for Certification” so that users see the search tier in their own languages.

If you don’t see a locale, you can add it in the *Add an Active Locale to the Label* area.

4. Go to *Learning Activities* > *Libraries* > *Items* and set items' search tier.

   You aren’t required to set a search tier. Learning items without a tier appear in the bottom of the list, grouped together.

   > → Tip
   >
   > Libraries often have many learning items associated with them. Use the filter (*Enter Title or ID*) and click *Go* to narrow the list of learning items.

5. Go to *Learning Activities* > *Libraries* > *Curricula* and set curricula's search tier.

   You aren’t required to set a search tier. Libraries without a tier appear in the bottom of the list, grouped together.

Task overview: Creating Libraries [page 13]

Previous task: Setting the Relevance of Libraries' Search Results [page 24]

Next task: Changing the Price of a Learning Item in a Library [page 26]

3.2.10 Changing the Price of a Learning Item in a Library

Change the price of a learning item in a library when you want a particular learning item in a particular library to have a price that is different from the default price.

Procedure

1. Go to *Learning Activities* > *Libraries* > *Items*.
2. Click *Price Changes*.
3. For the currency whose price you want to change, set the price in *Price*.
4. To change the default currency of the learning item, select its *Default* button.

Task overview: Creating Libraries [page 13]

Previous task: Setting the Search Tier of Libraries' Search Results [page 25]

Next task: Assigning Libraries to Learners [page 27]

3.2.11 Assigning Libraries to Learners

Assign libraries to groups of learners so that learners can browse and search for courses in the library.

Prerequisites

Before you can assign a library to learners, you create both the library and the assignment profile that creates the assignment. You create them in Learning Administration.

- Create libraries in *Learning Activities* > *Libraries*.
- Create assignment profiles in *Manage User Learning* > *Assignment Profiles*.

Context

In most cases, you create libraries that meet the needs of specific user groups. For example, you might want to create a library of engineering courses and a library of business courses. The simplest configuration is to create a single library and assign it to all learners.

When you assign multiple libraries to the same user, the user gets the union of all courses in all libraries. For example, if an assignment profile assigns an engineering library **and** a business library to learners, then the user sees all learning opportunities from both libraries.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Manage User Learning* > *Assignment Profiles*.
    - If you already have an assignment profile that pools learners into a group that should be assigned the library, search for and open the assignment profile.
    - If you don't yet have an assignment profile that pools learners into a group that should be assigned the library, click *Add New*.
2. On the *Rules* tab, check the assignment profile rules to make sure that it's pooling learners as you expect or to create the pool.
3. From the *Actions* dropdown, you can choose *Download Existing Users* to see the current pool of learners.
4. Go to the *Libraries* tab.
5. Choose + *Add Libraries* to find and select the library that you want to assign to the pool of learners, then choose *Add*.

Example

You can add more than one library to the assignment profile. You could, for example, add the Information Technology Courses for Managers library and also add a Team Building Courses for Managers library. The managers, in this case, see the union of the information technology and team building courses. They experience that union as single library.

Next Steps

After you add the library to the assignment profile, execute the changes to the assignment profile to complete the association of library to the learners in the pool. After you execute the changes, learners can use the search features to explore the learning activities in their library.

> → Tip
>
> If you accidentally remove a system object from an assignment profile, you can cancel the action before you execute the changes. Select *Remove/Undo Action* and choose *Apply Changes*. Check the status before you execute changes.

Task overview: Creating Libraries [page 13]

Previous task: Changing the Price of a Learning Item in a Library [page 26]

Next: How SAP SuccessFactors Learning Finds Recommendations for the Recommended for You Library Category [page 28]

Related Information

Creating an Assignment Profile [page 29]

3.2.12 How SAP SuccessFactors Learning Finds Recommendations for the Recommended for You Library Category

SAP SuccessFactors Learning looks in standard recommendation places to find recommendations for the *Recommended for You* library category.

If you've configured your system to allow recommendations and a user has at least one recommendation, that user sees the *Recommended for You* library category. Before the recommendation can appear in the category, however, SAP SuccessFactors Learning checks to see if the recommendation is in the users' libraries. If it isn't in the users' libraries, then it can't appear in the category.

Parent topic: Creating Libraries [page 13]

Previous task: Assigning Libraries to Learners [page 27]

3.3 Creating an Assignment Profile

Create assignment profiles to automatically match users with assignments dynamically, based on their attributes.

Prerequisites

- Check users' attributes for accuracy so that they can be captured by the assignment profile rules.
- Check system objects that you want to assign to verify that they're correct and ready to be assigned.

Context

Create assignment profiles when you want to create a pool of users, based on their attributes, and assign system objects to the users.

Procedure

1. Go to Learning Administration, and then navigate to *Manage User Learning* > *Assignment Profiles*.
2. Choose *Add New*.
3. Enter an Assignment Profile ID, then choose *Add*.
4. Use the tabs to complete the basic information and define the rules for the assignment profile.

   The rules create a pool of users by user attribute. All users in the pool are assigned to the same groups.

   > Note
   >
   > Because assignment profiles are a critical part of the application, you want to carefully record who the assignment profile was created for and what the assignment profile is meant to address. Use the basic information to describe why you're creating the assignment profile and what group, department, or person you're creating it for. This information can help you later by preventing you from adding users to a profile where they don't belong or changing an assignment profile you don't mean to change.
5. Choose *Save*.

Task overview: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Previous task: Creating Libraries [page 13]

Next: Learner Security Role Assignment Troubleshooting Tips [page 37]

3.3.1 Setting Up Assignment Profile Rules

Set up the rules of an assignment profile to determine who is added to the assignment profile pool.

Prerequisites

Create an assignment profile and add its basic information.

Context

Rules are the mechanisms that decide users' membership in assignment profiles. Each user entity passes through the rules in the assignment profile. When the rules resolve to true, the user becomes a member of the assignment profile. As their attributes change, users are automatically added or removed from the membership of the assignment profile. If you create assignment profiles that group users by job codes, for example, and users' job codes change, they're automatically moved from one assignment profile group to another and their learning assignments automatically change.

> → Tip
>
> You have two tools to help you build assignment profile rules. *Preview Users in Assignment Profile* shows you the users that you're capturing as you build rules. *Advanced User Search* is a dry run of a rule. For example, if you want to write a rule that finds all users in a region, you can do an advanced search for all users in that region and see who the rule will capture.

Procedure

1. If you don't already have the assignment profile open, go to SAP SuccessFactors Learning Administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Find and open the assignment profile that you want to edit.
3. Go to *Rules*.
4. Choose *Add Domain(s)* to add the scope of the rules.

   You restrict the assignment profile to run on only some security domains. The restriction is like the first rule in the assignment profile: users must be members of the selected security domains.
5. **Optional:** Choose *Create Group* to add a group of rules.

   Groups allow you to create more complicated evaluations. Groups are joined by OR. You can think of them as parenthesis around an equation (Group 1) OR (Group 2). For example, (Job Code = "Senior Sales Associate" AND Region = "West") OR (Job Code = "Senior Sales Associate" AND Alternate Job Code = "Manager").
6. Choose *Add Rule* to add the rules that users are evaluated against for membership to the group.
   a. Select an attribute of users to test.

      Attributes are defined by the system and include fields like country/region, address, job code, and so on. Importantly, custom fields are also part of the attributes, so any custom data in your system can be evaluated in rules.
   b. Select an operator.

      Not all operators are available for all attributes. For example, "Is Full-Time" can be either true or false, so operators like greater than and less than aren't available.
   c. Add a condition to be evaluated.

      If you want to evaluate a condition that contains a comma in the value, use "Contains" as the operator. To use a comma-separated list as a condition, the values can't contain commas and the operator must be one of the following: "Matches", "Does Not Match", "Equals", "Does Not Equal", "Include Indirect Reports of", or "Include Sub Entities Of".

      > ⓘ Note
      >
      > An Assignment Profile rule with an operator of "Matches" or "Does Not Match" can't accept a value that includes double quotes (").
   d. For performance reasons, we don't recommend using more than 2000 values in an assignment profile.
   e. Even if you have added more than 2000 values, you can only view 2000 values in the UI. We recommend deleting the values that are available in the UI or rebuilding the rule with only 2000 values.

7. To add another rule, choose *Add Rule* again.

Next Steps

We recommend that you preview the users in the assignment profile before you execute changes for it.

Task overview: Creating an Assignment Profile [page 29]

Next task: Manually Updating Assignment Profiles [page 32]

3.3.2 Manually Updating Assignment Profiles

Manually update users and assignments for assignment profiles when you don't want to wait for the Automatic Process Manager (APM) to pool users according to existing rules.

Prerequisites

You often execute changes for the assignment profile before you update users and assignments for it. By executing changes, you assure that SAP SuccessFactors Learning has the latest rules to update against.

Context

Update your assignment profiles manually either because you just changed the rules and executed changes for the rules or because you imported a batch of new users and you can't wait for the APM to run and make the assignments. For example, if a batch of users were imported with incorrect data so that they didn't pick up their assignments properly, fix the user data problem and then immediately update users and assignments to avoid bad assignments.

In nonproduction environments, you often update while you're testing assignment profiles. You update manually in this case because when you update manually, you can see your changes as soon as the job finishes.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Manage User Learning* > *Assignment Profiles*.
2. Find and open the assignment profile that you want to update.
3. In *Actions* choose *Update Users and Assignments*.

ⓘ Note

For Plateau legacy performance users, the system never removes an approved plan or its goals when you execute changes or update users and assignments for an assignment profile.

The dialog for scheduling a job to update the users and assignments opens.

4. Schedule the background job based on your preferences.
5. Choose *Finish*.

Task overview: Creating an Assignment Profile [page 29]

Previous task: Setting Up Assignment Profile Rules [page 30]

Next task: Checking an Assignment Profile Pool [page 33]

3.3.3 Checking an Assignment Profile Pool

Check an assignment profile pool to see the list of users captured by the assignment profile and pooled together for assignments.

Context

Although assignment profile pools don't exist as an object in the system, you can check the users who are pooled by an assignment profile. We recommend that you check the pool to gain visibility into the affects of your changes.

The list of users is generated from the *Assignment Profile Execute Updates* automatic process, so if you changed the rules and want to see the new pool of users, update users and assignments for the assignment profile first, and then check the existing users.

→ Tip

You can also preview the pool as you build rules: click *Download Preview Users* when you're adding rules.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Find and open the assignment profile with the pool that you want to check.
3. In *Actions*, click *Download Existing Users*.

> ⓘ Note
>
> Upon downloading existing users or preview users, the .xlsx file displays two new columns called *User Display Name* and *Manager Display Name*.
>
> When *General Display Name* is enabled and display names are available in the system, these new columns populate the display name for users and managers respectively. If the display name for the user or the the manager is not available in the system, these columns will be empty.

Task overview: Creating an Assignment Profile [page 29]

Previous task: Manually Updating Assignment Profiles [page 32]

Next task: Executing Changes for Assignment Profile Rules [page 34]

3.3.4 Executing Changes for Assignment Profile Rules

Executing changes attaches the users who are captured by the rules (the pool of users) with the assignments (libraries, curricula, and so on) in the assignment profile.

Prerequisites

Create an assignment profile and add objects to it. These objects are assigned to users who are captured by the assignment profile.

Context

When you change the rules of an assignment profile, you execute changes for those rules so that SAP SuccessFactors Learning knows that it has a new way of grouping users in this assignment profile. For example, if you originally had an assignment profile that pooled all users working in New York, and then you returned and added a rule that said users in Chicago should also be in the pool, you execute changes for the assignment profile's rules so that SAP SuccessFactors Learning knows to pool users in New York and now **also** users in Chicago.

In order to enhance the performance of assignment profile jobs, executing changes for custom fields isn't included in the assignment profile logic.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Manage Users Learning* > *Assignment Profiles*.

2. Find and open the assignment profile that you want to propagate.
3. In *Actions* click *Execute Changes*.

> ⓘ Note
>
> For Plateau legacy performance users, the system never removes an approved plan or its goals when you execute changes or update users and assignments for an assignment profile.

Next Steps

Update users and assignments for the assignment profile.

Later, if you update any part of the assignment profile, you must execute changes for it again.

Task overview: Creating an Assignment Profile [page 29]

Previous task: Checking an Assignment Profile Pool [page 33]

Next: Assignment Profile Pools [page 35]

3.3.5 Assignment Profile Pools

In SAP SuccessFactors Learning, assignment profile pools are a set of users with the same attribute values.

When you design an assignment profile, you write rules to tell it to look for users with an attribute. When it finds users with attributes that match the rules, it pools them. For example, you can write a rule that matches employees to a location. A rule that uses location could create pools for North America, South America, Africa, Europe, and Asia-Pacific, for example.

Pools are powerful because they are dynamic. A user who moves from North America to Africa is automatically removed from the North American pool and added to the African pool. To administrators, the act of changing the users' attributes moves them from pool to pool. Technically, the Assignment Profile Synchronization job redefines the pools when it runs in the background to look for updates.

Parent topic: Creating an Assignment Profile [page 29]

Previous task: Executing Changes for Assignment Profile Rules [page 34]

Next: Basic Assignment Profile Configuration [page 36]

3.3.6 Basic Assignment Profile Configuration

When you first create an assignment profile, you shape it with this basic configuration, but most of the changes in assignment profiles are made by changing their rules.

This Field...	...Is used as follows
Active	This tells you if the assignment profile is actively making assignments or not. Because assignment profiles actively make learning assignments, you can't simply deactivate them like other parts of SAP SuccessFactors Learning. Instead, we guide you through a deactivation process. To deactivate assignment profiles, click *Deactivate* in the *Actions* menu.
Contact Email, and Created For	You often want a single person or only a few people to manage assignment profiles because changes can have far-reaching effects. If you're the person in charge of this assignment profile, you want to type your email address so that other administrators can contact you about changes and you can manage those changes carefully. If you're returning to edit the assignment profile, you can use *Created For* to understand the person who originally requested the assignment profile. Check with this person before you make changes. If you're someone requesting a change, you can use the contact email to find the person who can change them for you. Be sure that the right person's name is in *Created For* so that you can coordinate the changes.
Notes	The *Notes* field helps you understand how and why the assignment profile was built. Although you can use the *Description* field to describe the main purpose or rationale for creating the assignment profile, you might need more need space to record additional information about why you created the assignment profile or any special instructions for maintaining the entity. In these cases, we recommend that you use the *Notes* field.
Description	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.
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.

Parent topic: Creating an Assignment Profile [page 29]

Previous: Assignment Profile Pools [page 35]

Next: Status Values for Adding Objects to SAP SuccessFactors Learning Assignment Profiles [page 37]

3.3.7 Status Values for Adding Objects to SAP SuccessFactors Learning Assignment Profiles

When you add objects to assignment profiles, they have a status to describe where they are in the assignment process.

Status Value	Meaning
Valid	The assignment profile has been propagated so the object has been assigned to users.
Pending Addition	The system recognizes that you've added the object, but the assignment profile hasn't been propagated so users don't have the assignment.
Pending Deletion	The system recognizes that you've deleted the object, but the assignment profile hasn't been propagated so users still have the assignment.

Parent topic: Creating an Assignment Profile [page 29]

Previous: Basic Assignment Profile Configuration [page 36]

3.4 Learner Security Role Assignment Troubleshooting Tips

To troubleshoot SAP SuccessFactors Learning as an administrator, you want to know how learners are assigned to their security roles.

In most cases, learners (users who are not acting as administrators, instructors, or managers) are assigned to their roles through a user connector. A user connector imports user data from an external system and populates the SAP SuccessFactors Learning user data. One of the fields that it imports is the users' roles.

You can check a users' role in *Users* > *Users* > *Summary*. If you change it, however, it is overwritten with the value from the connector the next time that the connector runs.

If the user is someone's manager, that manager has access to the *My Employees* tab.

Parent topic: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Previous task: Creating an Assignment Profile [page 29]

Next task: Masking User IDs in SAP SuccessFactors Learning Reports and Notifications [page 41]

3.4.1 Viewing a Library's Assignment Profiles

View a library's assignment profiles to see how the library is assigned to users.

Context

When you're troubleshooting library assignments, you often want to go to a library and see how it's assigned to users. SAP SuccessFactors Learning shows you the assignment profiles per library and launches the assignment profile. Additionally, you can quickly add and remove assignment profiles.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Libraries*.
2. Find and open the library you want to view.
3. Click *Assignment Profiles*.
4. To investigate an assignment profile, click it.

   The assignment profile editor opens. In the assignment profile, you can look at the rules and users in the profile.
5. To add an assignment profile, click + *(Add Assignment Profiles)*.

   We recommend that you instead go to the assignment profile (*Manage User Learning* > *Assignment Profiles*), open the correct assignment profile, and then add the library in its *Libraries* area. By adding the library through the assignment profile, you can check the rules and the users to make sure that you're making the correct selection. Additionally, SAP SuccessFactors Learning does **not** require you to execute changes for any assignment profiles that you associate with the library because the system associates the libraries with the users immediately.
6. To remove an assignment profile, select its *Remove* checkbox and then click *Save*.

   Before you remove an assignment profile, we recommend that you click it to open it, and make sure that you're removing the right one.

3.4.2 Creating Library Directed Search Direct Links

Administrators can create direct links to guide users to library search results that reflect pre-applied filters or configured keywords.

Context

Library Directed Search direct links take the user to the search results page in either the legacy search or enhanced search (depending on your configuration) and display results based on the criteria you set. Your direct links can be embedded in any environment that accepts URL links, such as an email or a web page. They can also be added to custom cards or banners in the new Learning experience.

Procedure

1. Go to SAP SuccessFactors Learning and then navigate to *System Administration* > *System Management Tools* > *Generate Direct Link*.
2. In *Direct Link Type*, select **`Library Directed Search`**.
3. In *Specify Search Criteria*, create a search for the user.
4. Choose *Display Link*.

Results

The copied URL opens a search displaying course results based on your configured filters and keywords.

3.4.3 Launching a Proxy Session to Troubleshoot Users

To troubleshoot users, you can launch a proxy session to see the application as they see it.

Context

Because mimicking a user carries security risk, most companies limit administrator access to proxy sessions and limits the sessions so that they don’t stay open indefinitely.

- To access the *Launch Proxy* link, you must have access to the administrator proxy permissions in your security role. Without these permissions, you can't launch the session.
- If your administrator session expires, your proxy session expires also. We recommend, however, that you click *Close Session* to close the user session after you're done troubleshooting.

- No administrator, regardless of permissions, can change the state of the user's assignment or completion. You can't, for example, launch content to complete it. If you want to complete a learning item for a user, use the learning event recorder tool.
- If you make other changes while in the proxy session, users see the changes as if they made them. For example, if you change the user's language settings, it looks to the user as if they made the change. In the history tables of the database, however, the system creates an audit trail of these changes using **your** ID. This allows a full reporting of who, exactly, made the changes.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *People* > *Users*.
2. Find and open the user who you want to troubleshoot.
3. In *Actions*, click *Launch Proxy*.
4. Decide how you want to view the user's experience.
    - Click *View in My Language* to see the user's interface in the language that you've selected in your preferences. This is useful if you're troubleshooting the experience of a user whose language you don't read.
    - Click *View in User's Language* to show the user's interface in the language that the user selected in their *Options and Settings*. This is useful if you're troubleshooting a language issue. For example: if a user is complaining that their language is incorrect or that a problem has occurred and you suspect it to be related to the language.

    > Note
    >
    > If the admin's language is the same of user's language, the language selection won't be displayed to the administrator.
5. Troubleshoot the issues that the user reported.

    When you proxy, you experience the application just like the user. You take on the user's configuration settings, their security settings, and so on. You are, however, prevented from changing a user's learning status: launching content, for example.
6. When you finish troubleshooting, click *Close Session* end the proxy session.

3.4.4 Scheduling Assignment Profiles to Update Automatically

Schedule assignment profiles to update automatically so the assignments made by the assignment profile can adjust automatically, on a schedule.

Context

The power of assignment profiles is that they assemble users into pools and automatically adjust the pools, and therefore the assignments, automatically. The Assignment Profile Execute Updates process makes the automatic changes. When it runs, it adjusts the pools and the assignments.

In most cases, you set the schedule for assignment profile updates at the beginning of your implementation and review its schedule periodically. For most customers, you can set the process to run daily.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Automatic Processes* > *Assignment Profile Execute Updates*.
2. Select the *Schedule this Process* checkbox.

   The *Schedule this Process* is an important toggle for assignment profiles. Because assignment profiles are such a central part of SAP SuccessFactors Learning, if you make major errors, you can use this toggle to shut down all scheduled processes quickly to avoid problems in your assignments.
3. Use the time settings to define a time for the process to run.
4. In *Email Address*, set an email address or a distribution list who should receive information from the system about the health of the assignment profile update process.

3.5 Masking User IDs in SAP SuccessFactors Learning Reports and Notifications

Mask user IDs in SAP SuccessFactors Learning reports so that administrators who see the reports cannot see the user IDs of the users they report on.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *System Configuration*.

2. Edit *LMS_ADMIN*.
3. Find `privacyActDefaultMask` and set it to the characters that administrators should see as the mask of the user ID.

   For example, most customers set the mask to `**********` (a line of asterisks). When administrators run reports in SAP SuccessFactors Learning Administration or when users receive email notifications from the system, they see the line of asterisks instead of the user ID of each user.
4. Find `privacyActMaskEnabled.`, and for each value, enable the mask.

   For example, if you set `privacyActMaskEnabled.Notification.StudentID` property to `true`, then for all notifications sent out, the user ID values appear as the set of characters defined in the `privacyActDefaultMask` property.

Task overview: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Previous: Learner Security Role Assignment Troubleshooting Tips [page 37]

Next task: Hiding User Images in SAP SuccessFactors Learning [page 42]

3.6 Hiding User Images in SAP SuccessFactors Learning

Hide user images in Learning if your company policy does not allow users' images to be shown as part of your learning practice.

Context

User images are set in SAP SuccessFactors platform. In most cases, you want to show them in Learning to help supervisors, for example, see their reports and quickly recognize individual reports. Some organizations, however, do not allow pictures of their employees. For organizations that do now allow pictures, we offer the ability to hide the pictures throughout SAP SuccessFactors Learning.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *LMS_ADMIN*.
3. Set `hideUserPhotosGlobally` to `true`.
4. Click *Apply Changes*.

Task overview: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Previous task: Masking User IDs in SAP SuccessFactors Learning Reports and Notifications [page 41]

Next task: Controlling Managers' View of Employees in Learning [page 43]

3.7 Controlling Managers' View of Employees in Learning

In Learning, managers can see their team members to assign them courses. You can control what the managers see and how they interact with their teams.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *LMS_ADMIN*.
3. Set how you want managers to view the individual learners in their teams.

Property	Description
`studentSubordinatesShowPictures`	When the `studentSubordinatesShowPictures` property is set to true, *Show Pictures* on managers' interface is selected. This setting interacts with the `hideUserPhotosGlobally` property. If the `hideUserPhotosGlobally` property is set to true, then the default preference is irrelevant—pictures never show.
`studentSubordinatesShowStatus`	When the `studentSubordinatesShowStatus` property set to true, *Show Status* in subordinate profiles is selected by default.
`studentSubordinatesShowSuccessors`	When the `studentSubordinatesShowSuccessors` property is set to true, *Show Successors* is selected by default for the Manager in the Subordinate Profiles area (*Show Successors* only appears in the Succession Planner).
`maxNumberOfSubordinatesDisplayedInTree`	If your managers manage very large teams, you can restrict the number of employees to appear under any node before paging. By default, the setting is **`300`**, which is a manageable size in most environments. Most customers do not need to change this property and most customers do not hit the default of 300 users per manager. But for those customers who do have 300 or more users per manager or for those

Property	Description
	customers who experience a slow *My Team* tab, you might want to change the value of this property.

4. Click *Apply Changes*.

Task overview: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Previous task: Hiding User Images in SAP SuccessFactors Learning [page 42]

Next task: Editing the Instructional Text on Learning Manager Dashboards [page 44]

3.8 Editing the Instructional Text on Learning Manager Dashboards

Edit the instructional text on Learning manager dashboards if you have a legacy Plateau implementation and must change the text on manager dashboards.

Context

Customers who implemented before or just after Plateau was purchased by SAP SuccessFactors might have unique instructional text on their manager dashboards. We no longer recommend unique instructional text because it complicates your configuration and adds cost without an equal benefit.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *LMS_ADMIN*.
3. Find `managerDashboardInstructionalText` and then look at its value.

   For example, if you see `managerDashboardInstructionalText=tab.MyInstructionalText`, make a note of the value `tab.MyInstructionalText`.
4. Go to *References* > *Manage Labels* > *Labels*.
5. Paste the value of `managerDashboardInstructionalText` into *Label ID* and then click *Search*.
6. In the search results, find the label name and then edit it.

   For example, find `tab.MyInstructionalText` in the search results, and then click its edit button.

7. Choose *Locales*.
8. For each language, edit the value of the instructional text.
9. Choose *Apply Changes*.

Task overview: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Previous task: Controlling Managers' View of Employees in Learning [page 43]

Next task: Updating Learning Manager and User Tools [page 45]

3.9 Updating Learning Manager and User Tools

Update Learning manager and user tools to take advantage of new functionality and experiences for users and managers when they add learning history and when managers register or withdraw users or assign or remove learning from users.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *LMS_ADMIN*.
3. Verify that `updatedSupervisorFlow` is set to `true`.
4. Verify that `updatedSelfRecordLearningFlow` is set to `true`.
5. To remove the ability for managers to type information into custom registration fields, set `allowSupervisorToEnterRegistrationFormCustomColumnsData` to `false`.

   We recommend the default setting of `true` because we also recommend that you do **not** collect sensitive personal data in the registration forms. If you do **not** collect sensitive personal data in the custom fields, then you can give managers the confidence of assisting their teams when registering them. In addition, a minority of customers uses custom data in registration forms.
6. To change the number of employees that a manager can withdraw in one action, change `supervisorMaxUserRegisterWithdrawLimit`.

   We don’t recommend changing this value from its default because we set it at a reasonable number for the managers' experience. If you set it too high, it becomes difficult for managers to understand who they’re withdrawing without a benefit and with a potential drawback. Managers rarely need to withdraw more than 50 users at once, and if you allow them to withdraw a high number to solve an edge case, they won't batch their withdraws and might end up withdrawing a user that they didn’t mean to withdraw. In the rare case that managers need to withdraw users over the limit, they can still do it, they just need to batch the users.
7. Click *Apply Changes*.

Task overview: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Previous task: Editing the Instructional Text on Learning Manager Dashboards [page 44]

Next task: Controlling When Learners are Notified of Changes to their Learning Assignments [page 46]

3.10 Controlling When Learners are Notified of Changes to their Learning Assignments

If you have a special case that requires special rules, change when users are notified of their learning assignments.

Context

Most customers can use the default settings for learner email notifications to changes to their learning assignments. We recommend the defaults. If, however, you have a special case that requires more restrictive notification rules, you can adjust the email notifications that SAP SuccessFactors Learning sends when courses are added and removed from learning assignments.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *User Settings*.
2. In the page, find *Learning Plan Email Notification Settings*.

> **Note**
>
> Learning Plan is the old phrase for what is now *Learning Assignments*.

3. Change how learners are notified when their assignments change.

Setting	Description
Notify user when item added to their learning plan	If you select *Notify user when item added to their learning plan*, SAP SuccessFactors notifies learners when courses are added to their learning assignments.
Notify user when item modified in their learning plan	If you select *Notify user when item modified in their learning plan*, SAP SuccessFactors notifies learners when their learning assignments are modified.

Setting	Description
Notify user when item removed from their learning plan	If you select *Notify user when item removed from their learning plan*, SAP SuccessFactors notifies learners when courses are removed from their learning assignments.
Allow user to modify learning plan notification settings	If you select *Allow user to modify learning plan notification settings*, learners can control their own email notifications. They can decide to be notified when courses are added, changed, or removed from their assignments. The values of the other learning email notifications become the default values. Learners can override your settings. For example, if you select *Notify user when item removed from their learning plan* and you select *Allow user to modify learning plan notification settings*, then by default, learners are notified when courses are removed but learners can go into their options and clear it so that they do **not** receive email notifications for removed courses.

4. Change how managers are notified of their employees' assignments.

> ⓘ Note
>
> For learners themselves, you typically want them to get their email notifications because it's about their own assignments. Typically, you also want managers to get email notifications from their employees, but it's slightly more likely that you want to disable the email notifications. You might disable the email notifications if you are in an organization that doesn't allow managers to assign or manage employee assignments. By disabling the email notifications, employee data is blocked from the manager.

Setting	Description
Notify Manager when user successfully completes an item	If you select *Notify Manager when user successfully completes an item*, notifies managers when a course is successfully completed by one of their employees.
Notify Manager when user unsuccessfully completes an item	If you select *Notify Manager when user unsuccessfully completes an item*,SAP SuccessFactors notifies managers when a course is unsuccessfully completed by one of their employees. This means that the user didn't meet the requirements in some way (didn't attend the entire course, didn't pass an exam, and so on).

5. Click *Propagate Learning Plan Email Notification Changes* and then follow the process to run the propagation job.

Next Steps

Schedule the Learning Plan Email Notification automatic process. Go to *System Administration* > *Automatic Processes* > *Learning Plan Email Notification*.

Task overview: Access Control for SAP SuccessFactors Learning Learners and Instructors [page 7]

Previous task: Updating Learning Manager and User Tools [page 45]

4 Security System for SAP SuccessFactors Learning Administrators

Understand the overall process for creating a security system for SAP SuccessFactors Learning administrators because the details can be complex.

When you consider a security system for SAP SuccessFactors Learning administrators, begin by understanding the elements of SAP SuccessFactors Learning security.

After you understand the basic elements, think through how you want to organize your security domains. You want to understand your security domains early in your process of implementing a security system because they organize your thinking about who can access which types of entities. For example, you can separate the security of your system into North American, South American, EMEA, and Asia Pacific domains.

With your domains organized, you can better see how you want to distribute administrators responsibilities. For example, you might create a role for each region or you might combine regions into two roles. At this point, you should be thinking about roles, not about people. That means:

- You can assign two roles to one administrator. For example, you might want to create a North American Learning Administrator role and a South American Learning Administrator role. You can assign both of these roles to one person so that he or she is responsible for entities in the North American and the South American domains.
- You should be thinking about what the role does and not just what the role can access. For example, one role might manage the account information for North America, a second might manage the courses and scheduling for North America, and yet a third might manage system administration for the global workforce.

After thinking about how you want to distribute administrators' responsibilities into security roles, create domain restrictions for each set of domains that a role should have access to. For example, if one role should have access to both North American and South American domains, create a domain restriction that includes both.

After you create the domain restrictions, create a security role for each administor responsibility. For example, “Account Manager for North America” or “Global System Administrator”.

While creating the roles, use the domain restrictions to control what that administrator can see and do.

1. Creating Security Domains for SAP SuccessFactors Learning Administrators [page 50]
   Create security domains for administrators so that you have an access control structure for your SAP SuccessFactors Learning learning entities.
2. Setting a List of Domains that SAP SuccessFactors Learning Administrators can Access [page 52]
   Set domain restrictions to create a list of security domains that an administrator role should be able to access.
3. Creating Security Roles and Setting Workflows for SAP SuccessFactors Learning Administrators [page 53]
   Create security roles and define workflows for administrators to define what administrators in those roles are allowed to do.
4. Adding or Removing Security Permissions in SAP SuccessFactors Learning Roles [page 54]
   Add or remove security permissions to or from a role in SAP SuccessFactors Learning if you adjust an existing role with new permissions.

5. Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Entity Records [page 55]
   When you want to restrict access by administrators to entity records, but you want the administrator to do all or most of the actions on the entity, create entity domain restrictions.
6. Using Domain Restriction to Limit SAP SuccessFactors Learning Administrator Access to Entity Functions [page 57]
   When you want to restrict access by administrators to functions (add, delete, edit, and so on) performed on entities, create functional domain restrictions.
7. Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Specific Actions [page 58]
   Use permission restrictions to be more specific about administrator actions than functional restrictions can be.
8. Assigning Roles to SAP SuccessFactors Learning Administrators [page 60]
   During implementation, you create security roles for your administrator personas. To maintain your learning administrators as they change personas, you add and remove security roles.

4.1 Creating Security Domains for SAP SuccessFactors Learning Administrators

Create security domains for administrators so that you have an access control structure for your SAP SuccessFactors Learning learning entities.

Prerequisites

Understand security domains, the PUBLIC security domain and domain hierarchy.

Context

An entity is a thing in SAP SuccessFactors Learning like learning items, users, or scheduled offerings. The domain that you associate with an entity controls who can access it: only administrators with access to that domain can act on that entity.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Admin* > *Security* > *Domains*.
2. Click *Add New*.
3. Select *Add Root (Top) Level Domain* and then type the unique ID of the top level domain in *Domain ID* and a description of it in *Description*.

For example, if you organize your domains in global regions, your top level (root) domain might be called GLOBAL and the description might be "Global domain for objects that affect the global organization."

4. Click *Add*.
5. In *Domain Types*, remove any entities that **cannot** be added to this domain.

   Domain typing creates a more sophisticated but more complicated domain structure because domain typing declares that only some kinds of entities can be added to a domain. To keep your installation simple, you can skip domain typing.
6. Go back to *System Admin* > *Security* > *Domains* and click *Add New* again.
7. Select *Add Sub Domain*.
8. In *Select Parent Domain*, select the parent of this child domain.

   For example, if your root domain is GLOBAL and you are adding a child of GLOBAL called North America, then select GLOBAL in *Select Parent Domain*.
9. Type the unique ID of the child domain in *Sub Domain ID* and a description of it in *Description*.

   For example, if your root domain is GLOBAL and you are adding a child of GLOBAL called North America, then type **`North America`** in *Sub Domain ID* and **`Entities for North America`** in *Description*.
10. If you are using domain types, and you want the child to inherit the same domain types as the parent, select *Inherit Parent Level Domain Types*.
11. Click *Add*.
12. If you are using domain types and you want the child to have different domain types than the parent, go to *Domain Types* and change them.

Next Steps

Repeat this process to add all subdomains down your domain structure. You can also create more than one domain structure by creating more than one root domain. Most customers, however, can use a single domain structure.

After you create your domain structure, create domain restrictions.

Task overview: Security System for SAP SuccessFactors Learning Administrators [page 49]

Next task: Setting a List of Domains that SAP SuccessFactors Learning Administrators can Access [page 52]

4.2 Setting a List of Domains that SAP SuccessFactors Learning Administrators can Access

Set domain restrictions to create a list of security domains that an administrator role should be able to access.

Context

Domain restrictions are a list of domains that a security role should be able to access **for a particular reason**. For example, an administrator might need to access North American and South American domains to **edit users**, but should be able to access Asia Pacific, EMEA, and South American domains to **look up course information**.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administation* > *Security* > *Authorized Security Domains*
2. Click *Add New*.
3. Provide the information required for the summary fields.
4. Go to *Domains*.
5. Click *add one or more from list* and then search for a domain that you want to add to the domain restriction.

   Find domains that a common set of administrators should be able to access.
6. In *Results*, if you want to create a family branch hierarchy, select *Include Sub Dmns* in the parent domain.

   This selects the parent and all subdomains so that your administrators are managing a branch of your domain tree.
7. In *Results*, if you want to create a parent-child domain restriction, expand the parent domain and select the parent and the child that the administrators should have access to.
8. In *Results*, if you want to create a sibling domain restriction, expand the parent and select its children.

   You can also search for and select the domains individually.
9. In *Results*, if you want to create a mix-and-match domain restriction, search for and select the domains individually.

Next Steps

Create the security roles for your administrators. When creating your security roles, apply your domain restrictions as:

- Entity domain restrictions
- Functional domain restrictions

- Permission domain restrictions

Task overview: Security System for SAP SuccessFactors Learning Administrators [page 49]

Previous task: Creating Security Domains for SAP SuccessFactors Learning Administrators [page 50]

Next task: Creating Security Roles and Setting Workflows for SAP SuccessFactors Learning Administrators [page 53]

Related Information

SAP SuccessFactors Learning Security Domain Restrictions [page 73]
SAP SuccessFactors Learning Domain Restrictions Summary Fields [page 75]
Entity Domain Restrictions [page 81]
Functional Domain Restrictions [page 83]
Permission Domain Restrictions [page 81]
SAP SuccessFactors Learning Behavior when no Domain Restriction is Assigned [page 68]
Creating Security Domains for SAP SuccessFactors Learning Administrators [page 50]
Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Entity Records [page 55]
Using Domain Restriction to Limit SAP SuccessFactors Learning Administrator Access to Entity Functions [page 57]
Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Specific Actions [page 58]
How SAP SuccessFactors Learning Roles Allow and Block Access to Data and Actions [page 64]

4.3 Creating Security Roles and Setting Workflows for SAP SuccessFactors Learning Administrators

Create security roles and define workflows for administrators to define what administrators in those roles are allowed to do.

Prerequisites

Before you create security roles, first create domains and domain restrictions. Although domains and domain restrictions are not a technical prerequisite, they are a business prerequisite because they help you think through how you want to organize your entities for security purposes.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Admin* > *Security* > *Role Management*.
2. Search for LEARNING_ADMIN and open it.
3. Click *Copy Role*.
4. Type a name that describes the administrator security role.

   For example, if the security role allows administrators to manage course entities (learning items, scheduled offerings, and so on) for North America type **`North American Learning Administrators`**. Or, if the security role allows administrators access to *System Admin* and its functions for the global domain, type **`Global System Administrators`**.
5. Select *Copy Assigned Workflows* and then click *Copy*.

   You now have a duplicate of the LEARNING_ADMIN role that has all the security administrator workflows.
6. In *Workflows*, remove any actions that you do **not** want to allow this group of administrators to do.

   When you remove workflows, you are not deleting the workflows from the system. Instead, you are indicating that the workflows **do not apply** to this role. Administrators in this role should not have the workflows, but the workflows continue to exist in the system.
7. Click *Apply Changes* when you are finished.

Task overview: Security System for SAP SuccessFactors Learning Administrators [page 49]

Previous task: Setting a List of Domains that SAP SuccessFactors Learning Administrators can Access [page 52]

Next task: Adding or Removing Security Permissions in SAP SuccessFactors Learning Roles [page 54]

4.4 Adding or Removing Security Permissions in SAP SuccessFactors Learning Roles

Add or remove security permissions to or from a role in SAP SuccessFactors Learning if you adjust an existing role with new permissions.

Context

When you adopt new features or periodically review your security roles, add security permissions to a role or remove them from a role.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Security* > *Role Management*.
2. Find and open the role that you want to edit.
3. Click *Permissions*.
4. To add a permission, click *add one or more from list* and then find and add the permissions.
5. To remove a permission, find it in the *Update the Permissions for the Role*, click its *Remove* box, and then click *Apply Changes*.

> → Tip
>
> To find the permission quickly, click *Expand All* and press CTRL + F to use your browser's find functionality to locate the permission.

Task overview: Security System for SAP SuccessFactors Learning Administrators [page 49]

Previous task: Creating Security Roles and Setting Workflows for SAP SuccessFactors Learning Administrators [page 53]

Next task: Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Entity Records [page 55]

4.5 Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Entity Records

When you want to restrict access by administrators to entity records, but you want the administrator to do all or most of the actions on the entity, create entity domain restrictions.

Prerequisites

Create domain restrictions to define the list of security domains that an administrator should be able to access.

Create a security role per job responsibility of your administrators.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Admin* > *Security* > *Role Management*.

2. Search for and open the security role that should limit administrators to entities in only some domains.
3. Go to *Entity Restr.*.
4. For each entity that you want to restrict by domain, select it in the *Domain Restriction ID* column.

   For example, if you have a domain restriction called Americas that limits to the North American and South American domains, and if you want administrators in this role to see Account Codes only if they are in the Americas, select the Americas domain restriction.
5. If you want this same domain restriction to apply to all entities with security domains, click *Apply to all Entities*.
6. If you can restrict by state, select the state that administrators should be allowed to access.
   - *Active* means that the administrators are able to access active entities of this type if they are in the domain restriction.
   - *Inactive* means that the administrators are able to access inactive entities of this type if they are in the domain restriction.
   - *Both* means that the administrators are able to access both active and inactive entities of this type if they are in the domain restriction.
7. Click *Apply Changes*.

Task overview: Security System for SAP SuccessFactors Learning Administrators [page 49]

Previous task: Adding or Removing Security Permissions in SAP SuccessFactors Learning Roles [page 54]

Next task: Using Domain Restriction to Limit SAP SuccessFactors Learning Administrator Access to Entity Functions [page 57]

Related Information

SAP SuccessFactors Learning Security Domain Restrictions [page 73]
Entity Domain Restrictions [page 81]
Using Domain Restriction to Limit SAP SuccessFactors Learning Administrator Access to Entity Functions [page 57]
Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Specific Actions [page 58]
Setting a List of Domains that SAP SuccessFactors Learning Administrators can Access [page 52]

4.6 Using Domain Restriction to Limit SAP SuccessFactors Learning Administrator Access to Entity Functions

When you want to restrict access by administrators to functions (add, delete, edit, and so on) performed on entities, create functional domain restrictions.

Prerequisites

Create domain restrictions to define the list of security domains that an administrator should be able to access.

Create a security role per job responsibility of your administrators.

Customers often create entity restrictions before functional restrictions because when you restrict by entity, you allow an administrator to do all things with the entity. For example, if you create an entity restriction on User entities, then as long as the user is in the list of domains that the administrator has access to, then the administrator can perform all functions on the user record. Functional restrictions are more specific because they limit administrators to basic functions (add, edit, view, and so on) within the entity.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Admin* > *Security* > *Role Management*.
2. Search for and open the security role that should limit administrators to entity functions in only some domains.
3. Go to *Function Restr.*.
4. Expand the entity that you need to limit by functionality for this role.

   When you expand an entity, all functions in that entity inherit any entity restrictions that you added. For example, if you added an entity restriction for Account Codes to limit the role to Americas domains, you see the Americas domain restriction for all functions when you first expand Account code.

   You often want to expand or limit the functions for the role beyond entity restrictions. For example, you might want the role to add, delete, and edit account codes in the Americas but you might want them to search and view account codes globally. You can add a Global domain restriction for Search and View.
5. If you want to apply the functional restrictions to all functions within the entity, select *Apply to All Functions within an Entity*.

   Apply to All Functions within an Entity is the same as going back to *Entity Restr.* and selecting that domain restriction on the entity, so this is a shortcut when you are in this tab and you want to **effectively** apply an entity restriction in the functional restriction area.
6. If you want to apply the functional restrictions to all functions in all entities, select *Apply to All Functions for all the entities*.

   Apply to All Functions for all the entities is the same as going back to *Entity Restr.*, selecting that domain restriction on the entity, and then selecting *Apply to all Entities*, so this is a shortcut when you are in this tab and you want to **effectively** apply an entity restriction to all entities (and all functions).

7. If you can restrict by state, select the state that administrators should be allowed to access.
    - *Active* means that the administrators are able to perform the function for all active entities of this type if they are in the domain restriction.
    - *Inactive* means that the administrators are able to perform the function for all inactive entities of this type if they are in the domain restriction.
    - *Both* means that the administrators are able to perform the function for both active and inactive entities of this type if they are in the domain restriction.
8. Click *Apply Changes*.

Task overview: Security System for SAP SuccessFactors Learning Administrators [page 49]

Previous task: Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Entity Records [page 55]

Next task: Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Specific Actions [page 58]

Related Information

Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Entity Records [page 55]
Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Specific Actions [page 58]
Setting a List of Domains that SAP SuccessFactors Learning Administrators can Access [page 52]
Functional Domain Restrictions [page 83]
Creating Security Roles and Setting Workflows for SAP SuccessFactors Learning Administrators [page 53]

4.7 Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Specific Actions

Use permission restrictions to be more specific about administrator actions than functional restrictions can be.

Prerequisites

Create domain restrictions to define the list of security domains that an administrator should be able to access.

Create a security role per job responsibility of your administrators.

Customers often create entity restrictions before functional restrictions and functional restrictions before permission restrictions, because each step is a more specific restriction. When you restrict by entity, you allow an administrator to do all things with the entity. For example, if you create an entity restriction on User entities, then as long as the user is in the list of domains that the administrator has access to, then the administrator can perform all functions on the user record. Functional restrictions are more specific because they limit administrators to basic functions (add, edit, view, and so on) within the entity. Workflow restrictions are even more specific. For example, although you can set a Copy Coupon domain restriction in *Function Restr.*, you can be more specific in permission restrictions. You can, for example, set a domain restriction on the administrators' ability to copy discount coupons as different from just copying coupons.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Role Management*.
2. Search for and open the security role that should limit administrators to entity permissions in only some domains.
3. Go to *Permission Restrictions*.
4. Expand the entity that you need to limit by permission for this role.

   When you expand an entity, all permissions in that entity inherit domain restrictions from the entity restrictions and functional restrictions.
5. Select the new domain restriction in *Domain Restriction ID*.
6. If you can restrict by state, select the state that administrators should be allowed to access.
   - *Active* means that the administrators are able to perform the permission for all active entities of this type if they are in the domain restriction.
   - *Inactive* means that the administrators are able to perform the permission for all inactive entities of this type if they are in the domain restriction.
   - *Both* means that the administrators are able to perform the permission for both active and inactive entities of this type if they are in the domain restriction.
7. Click *Apply Changes*.

Task overview: Security System for SAP SuccessFactors Learning Administrators [page 49]

Previous task: Using Domain Restriction to Limit SAP SuccessFactors Learning Administrator Access to Entity Functions [page 57]

Next task: Assigning Roles to SAP SuccessFactors Learning Administrators [page 60]

4.8 Assigning Roles to SAP SuccessFactors Learning Administrators

During implementation, you create security roles for your administrator personas. To maintain your learning administrators as they change personas, you add and remove security roles.

Context

You control access in SAP SuccessFactors Learning administration through roles in *System Administration* > *Security* > *Role Management*, but sometimes you need to know which role a particular administrator is assigned into or you need to onboard an administrator into a new job responsibility (persona).

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Administrator Management*.
2. Search for and open the administrator with the access issue.
3. Click *Assigned Roles*.

   You see the list of roles that this administrator has been assigned. If the roles look correct to you, the access issue could be a problem in the role itself. Write down the roles so that you can look them up in *System Administration* > *Security* > *Role Management* and check for the correct access **in the role**.
4. To add a new security role, which gives this administrator access to the permissions in the role, click *add one or more from list* and then search for and add the role.
5. To remove a security role, which removes this administrator's access to the permissions in the role, click *Remove* in the role's row and then click *Apply Changes*.

Task overview: Security System for SAP SuccessFactors Learning Administrators [page 49]

Previous task: Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Specific Actions [page 58]

5 Creating Holding Domains

Create holding domains in SAP SuccessFactors Learning so that you can hold unknown user domains, organizations, and financial accounts in a temporary domain and then correct them.

Context

When User Connector - SF runs, it sometimes includes user domains, organizations, and financial accounts that do not yet exist in the system. You create a holding domain to sequester the users, organizations, and financial accounts so that you can resolve them to their correct configuration later. The holding domains provide a way to group them together so that you can find them with a report.

Procedure

1. Go to SAP SuccessFactors Learning Administration, go to *System Admin* > *Security* > *Domains*, and then click *Add New*.
2. Select *Add Root (Top) Level Domain*.
3. In *Domain ID*, type **`TEMP_USER_DOMAIN_HOLD`**.
4. In *Description*, type **`Holding domain for users with domains that User Connector - SF does not recognize`**.
5. Click *Add*.
6. Repeat the steps above for the organization holding domain.

Field	What to type in the field
Domain ID	**`TEMP_ORG_HOLD`**
Description	**`Holding domain for organizations that User Connector - SF does not recognize`**

7. Repeat the steps above for the financial account holding domain.

Field	What to type in the field
Domain ID	**`TEMP_FIN_ACCT_HOLD`**
Description	**`Holding domain for financial accounts that User Connector - SF does not recognize`**

5.1 Setting Domain Restrictions for Holding Domains

Set domain restrictions for holding domains so that administrators can review users, organizations, and financial accounts that have been held for review.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Admin* > *Security* > *Domain Restrictions*.
2. Click *Add New*.
3. In *Domain Restriction ID* type **`TEMP_HOLDING_DOMAIN_RESTRICTION`**.
4. Go to *Domains*.
5. Add the temporary holding domains.

> Note
>
> If you used the standard naming convention, your holding domains start with TEMP_.

Next Steps

Assign the domain restriction to an administrator role that is responsible for reviewing the holding domains.

Related Information

Using Domain Restrictions to Limit SAP SuccessFactors Learning Administrator Access to Entity Records [page 55]

5.2 Holding Domains

Holding domains are SAP SuccessFactors Learning security domains that contain Learning objects that are on hold from User Connector - SF.

When User Connector - SF runs, the users that it imports from Platform are usually assigned to existing user domains, organizations, and financial accounts. For example, a user jsmith can be assigned to the organization HR and the organization HR usually already exists in Learning. When we import the user, the user goes into the organization.

In some rare cases, however, the organization exists in Platform but it does not yet exist in Learning. When it does **not** exist in Learning, it goes into a holding domain that you create during implementation. Learning system administrators can go through the holding domain on a regular basis, find users, organizations, or financial accounts that need to be addressed, and bring them into the system correctly.

For example, if the organization HR was added through the connector and didn't exist in Learning, it goes into the organization holding domain. System administrators check the organization holding domain and find HR. They can, for example, assign it to the correct parent organization, the correct security domain, and so on. They can also tell learning administrators that a new organization is available for assignment profiles.

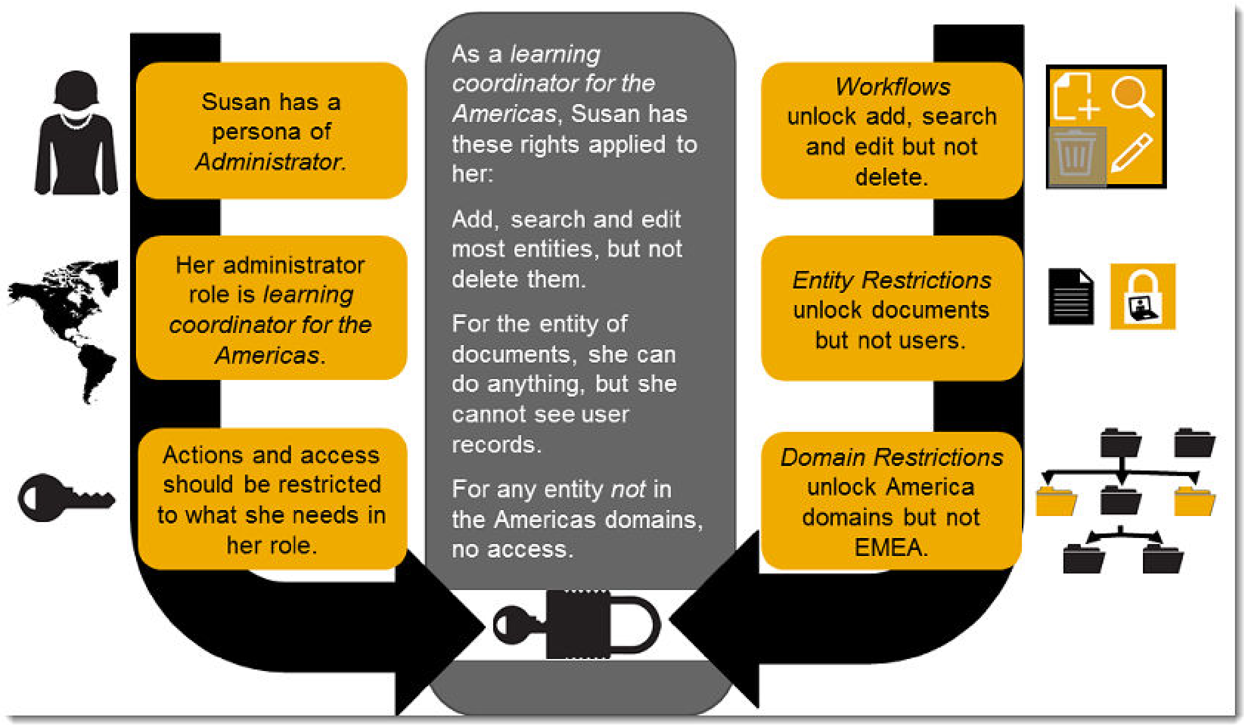
Without holding domains, new organizations (or user domains or financial accounts) might come into Learning unnoticed. You would have a hard time finding them and fixing them.

6 How SAP SuccessFactors Learning Roles Allow and Block Access to Data and Actions

Application of security in SAP SuccessFactors Learning means that you connect security objects to create a data access and data blocking system.

In SAP SuccessFactors Learning, security is applied through roles. You apply workflows, entity restrictions, and domains restrictions to a role and then you apply users to the role.

To understand this concept, consider a person named Susan in who has the persona of an administrator. As an administrator, she is in charge of North and South America. She schedules training, imports content, and so on. As a company policy, her company doesn't allow her to delete things in production, only inactivate them. Her company also prevents her from searching, adding, or deleting user records, or doing anything with users. Finally, because she is in charge of North and South America, she shouldn't be able to access any records outside of the America domains.



Example of Users Needs Defining Role and Role Granting Access

Related Information

Security Personas in SAP SuccessFactors Learning [page 66]
SAP SuccessFactors Learning Security Domains [page 69]
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SAP SuccessFactors Learning Security Roles [page 76]

7 Security Implementation of SAP SuccessFactors Learning

When you implement SAP SuccessFactors Learning, you assign security domains and security domain groups to roles to control who can access which features. Learning does **not** use Role Based Permissions (RBP) but instead uses security domains, roles and security permissions.

When you first implement SAP SuccessFactors Learning, you need to think a little about the roles of your end users and a lot about the roles of your administrators. In general, you can use default roles (or single roles) for users, managers, Human Resource Business Partners (HRBP), and instructors because those user types and roles are already very restricted.

Administrators are different. We find that most customers have many different administrator roles to implement, each with restrictions about the kinds of data that the administrators can see. We understand the need to be flexible when it comes to administrators, so we built a flexible and robust security system for administration. When you implement security, take time to map out the elements of security for administrators:

- Security Domains: Security domains are the foundation of SAP SuccessFactors Learning because they define the security structure.
- Security Domain Group: A security domain group is a list of security domains that you want to open to a set of administrators.
- Entities: Entities are things in the system that can be attached to a security domain (user, account code, learning item, and so on).
- Functions: Functions are actions that can be performed on an entity, like adding, deleting, or editing.
- Permissions: Permisssions are a combination of entities and function (adding a user or deleting an account code).
- Role: Roles are groups of users have the same permission and security domain group settings (for example, American Learning Administrators can Add Learning Items in the North American and South American security domains).

7.1 Security Personas in SAP SuccessFactors Learning

Users can have three personas in the SAP SuccessFactors Learning: Learner, Instructor, and Administrator.

When you set up a security system in SAP SuccessFactors Learning, you consider three possible personas of each user in your system. Each persona fits a job in the system: employees manage their own learning (or the learning of their teams), employees are instructors in others' courses, or employees are administering learning for your company as a whole.

> **Note**
>
> This division of personas in Learning is unique in SAP SuccessFactorsand it affects how you work with user data. For example, when working with data privacy, you delete personal data from each persona.

Learner: Including Manager and Human Resource Business Managers (HRBP) Types

When a person is in the learner persona, they're enrolling into courses, watching online content, searching for courses, and so on. They have access to the *Learning* module in the module picker and the tiles that their end-user role gives them access to. An individual learner can also be an instructor or an administrator.

For an employee to have a learner persona, he or she must have an account in *People* > *Users*. You assign security roles to learners in the *Role* field of the user entity. In most cases, the person's role as an end user is imported through a user connector.

> **Note**
>
> Managers, alternate managers, and Human Resource Business Managers (HRBP) are types of learners. They're responsible for their teams' learning. For example, a manager is a learner who has access to a team's learning. You don't need a separate **role** for managers, so it isn't a persona.

Instructor

An instructor has access to *My Classes* in the *Learning* module. For an employee to have an instructor account, he or she must have an account in *People* > *Instructors*. The employee's permissions as an instructor are controlled by their role as defined in *Role* in their instructor account.

You match people's instructor persona to their end-user personas by going to *People* > *Instructors* > *Summary* and associating the end-user persona in the *Related User* box. When you assign a related user, then the people can sign in under end-user credentials and act in the persona of an instructor.

Administrator

Only a few of your employees act in the role of administrator. An administrator has access to the administration environment. For an employee to have an administrator account, he or she must have an account in *System Administration* > *Security* > *Administrators*. The employee's permissions are controlled by their role as defined in *Assigned Roles*.

You match people's administrator persona to their end-user personas by going to *System Administration* > *Security* > *Administrators* and associating the end-user persona in the *Related User* box. When you assign a related user, then the people can sign in under end-user credentials and act in the persona of an administrator.

Related Information

Security System for SAP SuccessFactors Learning Administrators [page 49]

Creating a Default Learner Role [page 8]
Creating a Secondary Learner Role [page 9]
Creating an Instructor Role [page 10]

7.2 SAP SuccessFactors Learning Security Permissions

When you apply security permissions to a role, you indicate the actions that the role can take on specific entities or pages.

A security permission in SAP SuccessFactors Learning defines what a security role can do with an entity. It answers the question, what can administrators in this role do with users? For example, they can search learning items, add learning items, or edit learning items but not **delete** learning items.

In most cases, permissions follow this simple pattern:

- Add an entity (for example, add learning items)
- Edit an entity (for example, edit learning items)
- Search for an entity (for example, search for learning items)
- View an entity (for example, view learning items)
- Copy an entity (for example, copy learning items)
- Delete an entity (for example, delete learning items)

In some cases, however, a permission doesn't fit this pattern. For example, you can select *Run ad-hoc Item Evaluation Report* to give the role permission to run the ad-hoc evaluation reports. When the permission doesn't fit the simple pattern, it's apparent from their name what they control.

Permissions, by themselves, can control what users in a role can do in the system, but you often want to restrict the role further. For example, you want an administrator role to add learning items, but in the Americas domain only. Or you want to control whether a role can work on active or inactive learning items. These more precise permissions are handled by *Entity Restrictions*, *Functional Restrictions*, and *Permission Restrictions*.

System Administration > *Security* > *Role Management* > *Permissions* contains all the permissions associated with the security role.

7.3 SAP SuccessFactors Learning Behavior when no Domain Restriction is Assigned

SAP SuccessFactors Learning defaults to openness when you do **not** assign a domain restriction for a role.

Domains are open unless restricted. If you do not add a domain restriction to a role, then administrators in that role can access entities and functions in any domain. Specifically, when you do not assign a domain restriction to a role, or when you do not assign a domain restriction to a specific entity, function, or permission within the role, then the system grants access to all domains.

For example, imagine a system that has domains for regions of the world like North America, South America, Asia Pacific, and so on. If you create a domain restriction that allows access to only the North American domain and its sub-domains, and if you assign that domain restriction to a role in all places except the User entity in *System Administration* > *Security* > *Role Management* > *Entity Restr.*, then administrators in that role are restricted to North American Domains everywhere except the user entity. When searching for users, the administrator sees all domains, including North American domains, the PUBLIC domain, and any other domains in the system (like European domains).

Related Information

SAP SuccessFactors Learning Security Domain Restrictions [page 73]
Entity Domain Restrictions [page 81]
Functional Domain Restrictions [page 83]
Permission Domain Restrictions [page 81]

7.4 SAP SuccessFactors Learning Security Domains

A domain tells you the ownership of a record and who can edit it (for example, North American, South American and Asia-Pacific data).

Users, learning items, classes, curricula, content objects, and any other major SAP SuccessFactors Learning data entity has a *Domain* field. The value in the *Domain* field determines security ownership for that individual user, learning item, class (and so on).

For example, you can create three domains: North America, South America, and Asia-Pacific and you can place users into each of those domains by selecting one of them in the user record's *Domain* field. If you put John Doe into North America and Jane Doe in South America, then you are stating that John Doe's data - and the responsibility for its security - is owned by North American administrators. Jane Doe's data is owned by South American administrators.

You determine and add your SAP SuccessFactors Learning during implementation time and review them periodically thereafter. To add or edit domains, go to SAP SuccessFactors Learning administration and then go to *System Admin* > *Security* > *Domains*.

> ⓘ Note
>
> Administrators can self-limit their domains during their daily work by using Viewable Domains.

> → Tip
>
> To see all current data entities that have a *Domain* field (and therefore can be attached to a domain), add a dummy domain in *System Admin* > *Security* > *Domains* and then click *Domain Types*. Copy the contents of the domain types table and paste it into another file to save it. Then, delete the dummy domain.

7.4.1 SAP SuccessFactors Learning Security Domains Summary Fields

Security domain summary fields control basic information about the security domain, including its hierarchical relationship to other domains.

System Administration > *Security* > *Security Domains* > *Summary* contains the basic configuration of a domain.

This Field...	...Is Used as Follows
Domain ID	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. For more information about how you can configure access to records, see Security.
Description	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.
Select Parent Security Domain	You can use the *Select Parent Security Domain* box to identify the immediate parent domain of the current domain. After you select a parent domain, the system calculates the total number of parents in the chain and assigns a level to the current domain. All root-level domains begin at zero; the system increments each subsequent subdomain by one. Depending on the business goals or needs of your company, you can create one root-level domain or several. By identifying a parent domain, you can create a hierarchical structure for domains.
Make it Root Level	When you select the *Make it Root Level* check box, you set the level for the record to zero. After you add a new record, the *Make it Root Level* check box is only available after you identify a parent for the current record.

7.4.2 SAP SuccessFactors Learning Domain Types

Domain types are used in more complex security models to determine which data entities can be added to a domain.

By default, when you add a security domain to SAP SuccessFactors Learning, that domain can be associated with all entities that accept domain security. And for most customers, the fact that a domain is available for all entities is good because it is a simpler implementation. Many customers, however, need a more complexity, so the security framework enables you to determine which entities can accept which domains.

For example, you can create federal domains and allow them to be associated with only those entities that apply specifically to U.S. Federal Government administration (SF-182 form elements like training type codes, for example) Or, you can create financial domains that apply specifically to your financial implementation of SAP SuccessFactors Learning (account codes, for example).

→ Tip

If you think you need domain types for your implementation, we recommend that you engage an implementation partner to help you construct a security strategy.

You can limit domains to only some entities by removing the unwanted entities in *System Admin* > *Security* > *Domains* > *Domain Types*.

7.4.3 The SAP SuccessFactors Learning PUBLIC Security Domain

Every implementation has a PUBLIC security domain, which is available to all administrators.

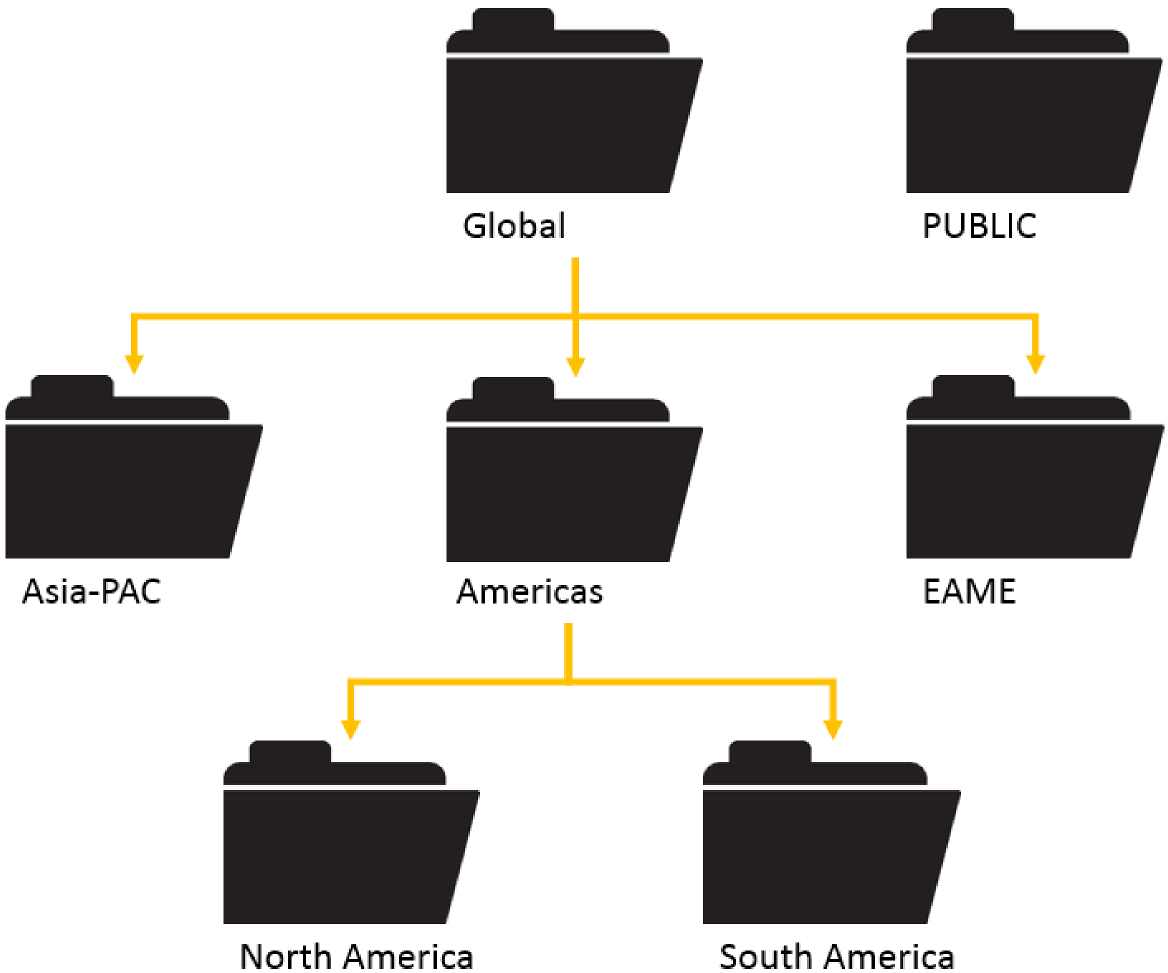
When you implement SAP SuccessFactors Learning you start with a security domain called PUBLIC. This domain is available to all administrators and all administrators are responsible for the security of data in the PUBLIC domain. It exists outside any other domains or hierarchy that you create.

A common practice uses PUBLIC like a network share. For example, imagine a North American learning administrator and a South American learning administrator. Each has access to his or her regional domain (North American domain or South American domain). If the North American administrator wanted a copy of the South American administrator's learning item, the South American administrator could copy it and place the copy in the PUBLIC domain. The North American administrator, then, just needs to change the learning item's *Security Domain* field to **`North American`** and take ownership of the security for that learning item.

7.4.4 SAP SuccessFactors Learning Security Domain Hierarchy

Domain hierarchy allows you to build a security structure that mirrors your organizational or geographic structures of your company.

At larger companies, domain structures often match the organization or regional structure. Depending upon the unique access requirements of groups of administrators, this model varies. We recommend that you create a domain structure that is small enough to be simple but large enough to accommodate your security needs.



Simple Domain Structure using Geographic Hierarchy

Related Information

The SAP SuccessFactors Learning PUBLIC Security Domain [page 71]

7.4.5 Setting Default Security Domain Selections in SAP SuccessFactors Learning

As a learning administrator, you can set the default domain filter for searches in Learning so that you limit searches to the security domains that you are responsible for.

Context

In complex domain configurations, learning administrators often have **permission** to view many domains but are assigned to work with only a few of those domains. Administrators in these situations often want to filter domains to see only those domains that they work on, not all domains they have access to.

> ⓘ Note
>
> You can also create a saved search that returns only the domains you want to view. For each search, you can edit the search with other criteria.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then select **Preferences**.
2. Click *Viewable Domains Tab* and then click *Edit*.
3. Add the domains that you normally work with.

Results

In SAP SuccessFactors Learning searches, your *Domain* filter includes only these domains.

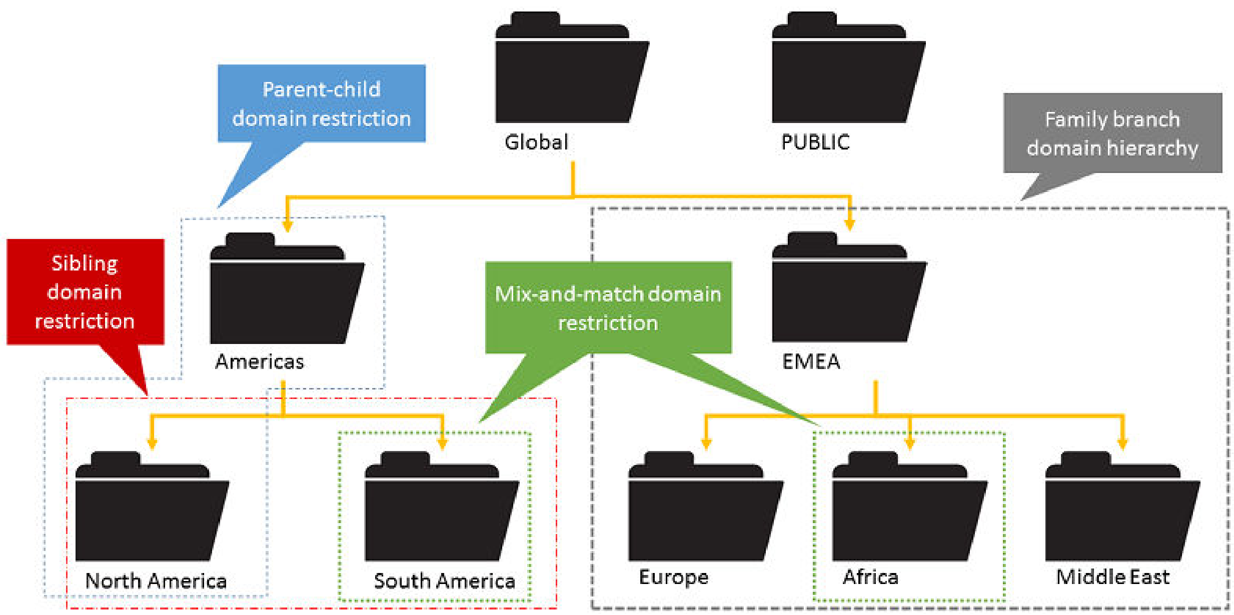
7.5 SAP SuccessFactors Learning Security Domain Restrictions

A domain restriction is a list of domains that an administrator role should be allowed to access.

A domain restriction restricts administrators' access to a set list of domains (plus the PUBLIC domain). For example, you can create an Americas domain restriction that includes North America and South America. Administrators in roles with the Americas domain restriction can access records in the North American and South American domains. You can also create a Europe, Middle East, and Africa (EMEA) domain restriction that includes the Europe domain, the Middle East Domain, and the Africa Domain. Administrators in roles with the EMEA domain restriction can access records in the European, Middle East, and African domains.

You can add any domains to a domain restriction, but there are some patterns to customer implementations of domain restrictions:

- Family branch: In this pattern, an administrator role is responsible for a branch of the domain hierarchy. For example, an administrator is responsible for records in EMEA region, which includes records in the EMEA domain plus its subdomains of Europe, Africa, and Middle East.
- Sibling: In this pattern, an administrator role is responsible for siblings on the same branch. For example, an administrator is responsible for records in North America and South America but **not** in the parent Americas domain.
- Parent-child: In this pattern, an administrator role is responsible for a parent and one or more child but not the entire branch of the domain hierarchy. For example, an administrator is responsible for records in the Americas and in North America but not North America's sibling of South America.
- Mix-and-match: In this pattern, any domains are put together in a domain restriction. Mix-and-match patterns are often exceptions in your organization. For example, you might have an administrator who is responsible for Africa and South America even though those two domains have different parent domains and different organizations in your company.



Domain Restriction Types

Domain restrictions are enabled when you assign them to a security role. When you do, you have the choice to make them permission, entity, or functional domain restrictions or to apply no domain restrictions. Each is a different method of restricting administrator actions to your list of domains. When you are setting up domain restrictions, it can be helpful to understand how the different methods of restriction work.

To manage your domain restrictions, go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Domain Restrictions*.

Related Information

Permission Domain Restrictions [page 81]

[Entity Domain Restrictions [page 81]
Functional Domain Restrictions [page 83]
SAP SuccessFactors Learning Behavior when no Domain Restriction is Assigned [page 68]
SAP SuccessFactors Learning Domain Restrictions Summary Fields [page 75]
Setting a List of Domains that SAP SuccessFactors Learning Administrators can Access [page 52]

7.5.1 SAP SuccessFactors Learning Domain Restrictions Summary Fields

Domain restriction summary fields contain basic information about the domain restriction.

In *System Admin* > *Security* > *Domain Restrictions* > *Summary tab*, you can edit the description and domain associated with the domain restriction.

This Field...	...Is Used as Follows
Domain Restriction ID	The Domain Restriction ID identifies a domain restriction. Users in the security role will be unable to access the given entity if the entity belongs to one of the domains in the domain restriction. To apply the domain restriction to all entities, select *Apply to all Entities*. For more information about how you can configure access to records, see Security.
Description	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.

Related Information

SAP SuccessFactors Learning Security Domain Restrictions [page 73]
SAP SuccessFactors Learning Security Roles [page 76]
Security Implementation of SAP SuccessFactors Learning [page 66]

7.6 SAP SuccessFactors Learning Security Roles

A security role is a collection of rules, restrictions, permissions, and domains that you can attach to a user to define the user's privileges in SAP SuccessFactors Learning.

Roles are groups of users have the same domain, permission, and domain restrictions settings (for example, American Learning Administrators can Add Learning Items in the North American and South American domains). You can create roles in *System Administration* > *Security* > *Role Management*.

Related Information

Role Management Summary Tab [page 76]
SAP SuccessFactors Learning Security Permissions [page 68]
Entity Restriction Tab [page 77]
Function Restriction Tab [page 78]
Permission Restrictions Tab [page 80]
Viewing Users and Administrators in Roles [page 79]
Permission Domain Restrictions [page 81]
SAP SuccessFactors Learning Behavior when no Domain Restriction is Assigned [page 68]
Entity Domain Restrictions [page 81]
Functional Domain Restrictions [page 83]

7.6.1 Role Management Summary Tab

View this section if you want to edit the description and domain associated with the role.

In *System Administration* > *Security* > *Role Management* > *Summary*, you can edit the description and domain associated with the role and also view the role type.

This Field...	...Is Used as Follows
Description	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.

This Field...	...Is Used as Follows
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. For more information about how you can configure access to records, see Security.
Role Type	The role type determines whether the role applies to administrators who use SAP SuccessFactors Learning Administration or the user interface. User role types only contain permissions, whereas admin role types can contain permissions as well as entity, function, and permission restrictions.

Related Information

SAP SuccessFactors Learning Security Domain Restrictions [page 73]
SAP SuccessFactors Learning Security Roles [page 76]
Security Implementation of SAP SuccessFactors Learning [page 66]

7.6.2 Entity Restriction Tab

View this section if you want to use domain restrictions to create entity restrictions.

To use *System Administration* > *Security* > *Role Management* > *Entity Restr.* correctly, you must first create domain restrictions. You can create domain restrictions in the Domain Restrictions section. Roles of Admin type can also have entity restrictions.

> **Note**
>
> In security roles, functional restrictions and permissions restrictions inherit entity restrictions, unless configured otherwise. For example, if you apply a domain restriction to the user entity, all functions of user are also restricted. If a role is restricted from the user entity, then by default, its users cannot add users, delete users, edit users, or perform any other user functions unless the role specifically allows it.

This Field...	...Is Used as Follows
Entity	The entity column contains the entity from which users will be restricted. Not all entities can be restricted because not all entities have domains. For all entities that can be restricted, you see a box in the *Domain Restriction ID* column.

This Field...	...Is Used as Follows
Domain Restriction ID	The Domain Restriction ID identifies a domain restriction. Users in the security role will be unable to access the given entity if the entity belongs to one of the domains in the domain restriction. To apply the domain restriction to all entities, select *Apply to all Entities*.
State Restriction	The state restriction further identifies the entity to be restricted. Not all entities that have domains also have states. For all entities that have states as well as domains, you see a list in the *State Restriction* column. When you select a state, users in the security role will be unable to access the given entity when it is in the state. If the entity leaves the state, users can access it again.

Related Information

Entity Domain Restrictions [page 81]
SAP SuccessFactors Learning Security Domain Restrictions [page 73]

7.6.3 Function Restriction Tab

View this section if you want to place restrictions on functional aspects of security roles.

To use *System Admin* > *Security* > *Role Management* > *Function Restr.* correctly, you must first create domain restrictions. You can create domain restrictions in the Domain Restrictions section. We recommend that you define your entity restrictions on the Entity Restr. Tab. Roles of type Admin can have functional restrictions.

> **Note**
>
> In security roles, functional restrictions and permissions restrictions inherit entity restrictions, unless configured otherwise. For example, if you apply a domain restriction to the user entity, all functions of user are also restricted. If a role is restricted from the user entity, then by default, its users cannot add users, delete users, edit users, or perform any other user functions unless the role specifically allows it.

This Field...	...Is Used as Follows
Function	The function can be performed on an entity. Most entities have the functions: Add (entity), Delete (entity), Edit (entity), Search (for entity), and View (entity). If a function has a box in the Domain Restriction ID column, it can be restricted. Not all functions can be restricted because not all entities have a domain attribute.
Domain Restriction ID	The Domain Restriction ID identifies a domain restriction. Users in the security role will be unable to access the given entity if the entity belongs to one of the domains in the domain restriction. To apply the domain restriction to all entities, select *Apply to all Entities*.
State Restriction	The state restriction further identifies the entity to be restricted. Not all entities that have domains also have states. For all entities that have states as well as domains, you see a list in the *State Restriction* column. When you select a state, users in the security role will be unable to access the given entity when it is in the state. If the entity leaves the state, users can access it again.

Related Information

Functional Domain Restrictions [page 83]
SAP SuccessFactors Learning Security Domain Restrictions [page 73]
Entity Restriction Tab [page 77]

7.6.4 Viewing Users and Administrators in Roles

View the users and administrators in roles if you're troubleshooting an access issue and you want to see what users or administrators are using the role.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Security* > *Role Management*.
2. Find and open the role that you want to investigate.
3. Go to *Users*.

Results

You see the learners (end users) or the learning administrators who are using the role. If you see the message *There is nobody using this role*, then no learners or administrators are assigned to the role.

Next Steps

If you see a user that you don't expect to be in the role or who is in the wrong role, you can fix it in one of these places:

- If it's an administrator role, you can assign the new role directly to the administrator in *System Administration* > *Security* > *Adminstrator Management*.
- If it's a learner (end user) role, then can fix the assignment profile.

7.6.5 Permission Restrictions Tab

View this section if you want to place restrictions on which users can perform specific tasks.

To use *System Administration* > *Security* > *Role Management* > *Permission Restrictions* correctly, you must first create domain restrictions. You can create domain restrictions in the Domain Restrictions section. We recommend that you define your entity restrictions on the Entity Restr. Tab.

> Note
>
> In security roles, functional restrictions and permissions restrictions inherit entity restrictions, unless configured otherwise. For example, if you apply a domain restriction to the user entity, all functions of user are also restricted. If a role is restricted from the user entity, then by default, its users cannot add users, delete users, edit users, or perform any other user functions unless the role specifically allows it.

The Permission Restrictions tab contains two pairs of *Domain Restriction ID* and *State Restriction* columns. The first pair shows the current restriction, inherited from Entity Restriction, and the second shows your choice, if you choose to override.

When you apply a domain restriction to a permission, users assigned to the role can't perform the permission's task on any domains in the domain restriction.

Related Information

Permission Domain Restrictions [page 81]
SAP SuccessFactors Learning Security Domain Restrictions [page 73]

7.6.6 Entity Domain Restrictions

This is how SAP SuccessFactors Learning behaves when you add an entity domain restrictions for a role.

Use entity domain restrictions when you want to control access by the **entities** in the system. For example, if you want an administrator to have access to users in the North American domain, you can create a domain restriction that includes the North American domain and then assign the North American domain restriction to a North American administrator role in the *Entity Restr.* fields.

Entity Domain Restriction Example

Entity	Domain Restriction	State Restrictions	Meaning
Account Code	America	N/A	Administrators can work with account codes that are in the domains listed inside the America domain restriction. Some entities do not have a state restriction.
Learning Item	South America	Inactive	Administrators can work with learning items that are in the South American domain restriction if the learning items are inactive.
Assignment Profile	North America	Both	Administrators can work with assignment profiles that are both active an inactive if the assignment profiles are in the domains listed in the North American domain restriction.

You create domain restrictions for a role by going to *System Administration* > *Security* > *Role Management* and then clicking *Entity Restr.* for the role. Entity restrictions transfer to permission restrictions (in *Permission Restrictions*). For example, if you put the North American domain restriction on Account Codes, then any permission that has Account Codes in the *Entity* column gets the North American domain restriction.

Related Information

SAP SuccessFactors Learning Security Domain Restrictions [page 73]
Functional Domain Restrictions [page 83]
Permission Domain Restrictions [page 81]
SAP SuccessFactors Learning Behavior when no Domain Restriction is Assigned [page 68]

7.6.7 Permission Domain Restrictions

This is how SAP SuccessFactors Learning behaves when you add a permission domain restriction for a role.

Permission domain restrictions allow administrators to do what the permission describes as long as the entity is in a permission in the domain restriction list. For example, one permission is “Assign Curriculum To User”.

Permission domain restrictions allow you to say, “If the user is in the North American or South American domain, allow administrators in this role to assign curricula to the users”.

To manage your domain restrictions, go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Role Management* > *Permission Restrictions*.

Permission Restriction Example

Permission	Function	Entity	Domain Restriction	State Restrictions	Meaning
Delete Region	Delete	Region	America	Inactive	Administrators can delete [function] regions if the region [entity] is in the America domain restriction list and they are inactive.
Delete User	Delete	User	America	Inactive	Administrators can delete [function] users if the user [entity] is in the America domain restriction list and they are inactive.
Edit Approved External Learning Request	Edit	User	America	Active	Administrators can edit [function] users' approved external learning requests if the user [entity] is in the America domain restriction list and they are active.
Edit Assignment Profile	Edit	Assignment Profile	South America	Active	Administrators can edit [function] assignment profiles if the assignment profile [entity] is in the South American domain restriction list and they are active.
Edit Assignment Profile Catalog	Edit	Assignment Profile	South America	Both	Administrators can edit [function] assignment profiles' catalogs if the assignment profile [entity] is in the South American domain restriction list and they are either active or inactive.

Related Information

SAP SuccessFactors Learning Security Domain Restrictions [page 73]
Entity Domain Restrictions [page 81]

Functional Domain Restrictions [page 83]
SAP SuccessFactors Learning Behavior when no Domain Restriction is Assigned [page 68]

7.6.8 Functional Domain Restrictions

This is how SAP SuccessFactors Learning behaves when you add a functional domain restriction for a role.

Functional domain restrictions restrict administrators to performing **functions** on a smaller list of domains. For example, you can restrict users to adding account codes to only three or four domains, but allow searching for account codes to a wider set of domains. to access functions on entities in the domains that are associated with the domain restriction.

A common approach is to create entity restrictions first and then limit the functions within the entity second. For example, you might want some administrators to have editing rights to account codes in the North American domain other administrators to have editing rights to account codes in the South American domain. But you might also want them to view each others' account codes.

In this situation, you can create two roles: North American Role and South American Role. To the North American Role, you assign the North American entity domain restriction and to the South American Role, you assign the South American entity domain restriction. At this point, North American administrators work with North American account codes and South American administrators can work with South American account codes, but they cannot view each others' account codes.

To allow them to view each others' account codes, create another domain restriction called "Americas" that includes both the North American and the South American domains. In their roles' *Functional Restr*, change *Account Code* > *Search* and *Account Code* > *View* to Americas.

Functional Domain Restriction Example on Account Code

Function	Domain Restriction	Meaning
Add Account Code	North America	Administrators can add account codes to the domains listed in the North American domain restriction. Some entities do not have a state restriction.
Delete Account Code	North America	Administrators can delete account codes to the domains listed in the North American domain restriction.
Edit Account Code	North America	Administrators can edit account codes to the domains listed in the North American domain restriction.
Search Account Code	America	Administrators can search for account codes to the domains listed in the American domain restriction.
View Account Code	America	Administrators can view account codes to the domains listed in the American domain restriction.

Related Information

SAP SuccessFactors Learning Security Domain Restrictions [page 73]
Entity Domain Restrictions [page 81]
Permission Domain Restrictions [page 81]
SAP SuccessFactors Learning Behavior when no Domain Restriction is Assigned [page 68]

7.7 Detailed SAP SuccessFactors Learning Security Rules

Use the detailed security rules to help you understand how the elements of security interact, especially in a complex environment.

Rules About Roles

- Users in the Instructor or Learner persona can be assigned to one role only.
- Users in the Administrator persona can be assigned to multiple roles.
- Administrators receive the union of the granted permissions. If Role UM grants all user management permissions and Role P grants all performance permissions, then a user assigned both Role UM and Role P has access to both user management and performance permissions.
- If a user is assigned to more than one role, the user receives the union of the access granted in the restriction tabs. If Role DA allows access to Security Domain A and Role DB allows access to Security Domain B, then a user assigned to both roles has access to both Security Domain A and Security Domain B.

Rules About Security Domains

- All entities are assigned a security domain, so administrators can't save an entity without a security domain. Entities default to the PUBLIC security domain.
- Administrators can't perform an action that would cause an entity to be beyond their permissions. For example, if they have permission to the North American security domain but not the South American security domain, they can't change an entity's security domain from North America to South America.

Rules About Restrictions

- If a user is assigned to more than one role, the user receives the union of the access granted in the restriction tabs. Imagine that you have two roles in your system: "North American Learning Administrator" has access to entities in the North American security domain and "South American Learning Administrator" has access to entities in South American security domain. If you assign a learning administrator to both roles, then that administrator has access to both the North American and South American security domains.

- State restrictions don’t cross over security domain group chain. For example:
    - Security Domain Group L contains Security Domains X and Y.
    - Security Domain Group M contains Security Domain Z
    - Role H contains Security Domain Group L for User Entities that are Active.
    - Role I contains Security Domain Group M for User Entities that are Inactive
    - Administrator R is assigned Role H and Role I
    - User 1 is Active and in Security Domain X
    - User 2 is Inactive and in Security Domain Y
    - User 3 is Inactive and in Security Domain Z
    - Administrator R has access to User 1 and User 3 – User 2 is in Security Domain Y (which the Admin could access through Administrator R > Role H > Security Domain Group L > Security Domain Y), but the user is inactive, which isn’t allowed in the chain of access. Note that the state doesn’t cross over the security domain group chain: The chain Administrator R > Role I > Security Domain Group M > Security Domain Z for inactive users is irrelevant to the other chain.
- When you assign an entity restriction, all functional and permission restrictions on that entity inherit the same restrictions. You can, however, change the restrictions on a per-function or per-permission basis. But if you change the functions, you can create a situation where you grant access to perform a function on an entity that is unreachable to a role. Extending the example above, if you changed the functional restriction to allow Role H to delete inactive users in Security Domain Group M, the setting is irrelevant. The only user the setting would affect is User 2, and Administrator R has no way of getting to that user.

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