SAP SuccessFactors

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Implementing Instructor Tracking and the Instructor Dashboard

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Change History

Learn about changes to the documentation for Implementing Instructor Tracking and the Instructor Dashboard.

2H 2024

Type of Change	Description	More Info
Changed	We removed the Skype Integration topic in preparation for the discontinuation of support for Skype.	

1 SAP SuccessFactors Learning Instructor App Notes

Before setting up the SAP SuccessFactors Learning learning app, we want you to be aware of these notes.

The instructor app does not connect to learning commerce, so any actions taken by the instructor in the mobile app do not impact commerce features. For example, if an instructor adds a user to course that has a cost, and if the instructor records learning for that user, the user is not charged the cost. It is free for the user unless you later manage that cost in the administration environment.

2 Adding Instructors to SAP SuccessFactors Learning

Add instructors to SAP SuccessFactors Learning to track your instructors as resources and to give them access to the instructor dashboard where they can manage their training responsibilities.

Prerequisites

Instructor records are a persona in SAP SuccessFactors Learning. The sign-in capability is handled by the instructor persona's related user. The related user is the same person as the instructor, but the user record controls the person's ability to sign in. The person's user should be added by the user connector from SAP SuccessFactors platform. You can look for the related user persona in *Users* > *Users*.

Procedure

1. Go to SAP SuccessFactors Learning Administration, go to *Learning* > *Instructors*, and then click *Add* to add individual instructors.

   > → Tip
   >
   > If you have many instructors to add, you can import them in bulk in *System Admin* > *Tools* > *Import Data*.

2. Create an instructor role if you plan to grant your instructors access to the instructor dashboard.
3. If you want to allow QR Code attendance taking, enable it for instructors and scheduled offerings.
4. If you want to enable instructors to post attendance for impromptu courses that they hold, enable it in the instructor role.
5. Assign the role to the instructors.
6. Add the related users to the instructors so that the instructors can see the instructor dashboard.

1. Importing Instructors [page 7]
   Import instructors with *Import Data* upload instructor information in bulk.
2. Creating an Instructor Role [page 8]
   Create an instructor role to allow your instructors access to the instructor dashboard.
3. Enabling QR Codes to Record Attendance [page 9]
   Enable QR codes to allow instructors to record users' attendance in their courses by scanning a code that is sent to them in an enrollment email notification or on their mobile devices with the SAP SuccessFactors app.
4. Enabling Instructors to Post Learning for Impromptu Training [page 11]

Enable instructors to post learning for Impromptu training to accommodate organizations that call for a trainer and training event without formally scheduling it in the Learning Management System (LMS).

5. Assigning the Instructor Role [page 12]
   Assign the Instructor role to instructors to enable them to view the instructor dashboard.
6. Assigning a Related User to Instructors [page 13]
   Assign related users to instructors so that instructors can log in to the instructor dashboard (*My Classes*).
7. Editing Basic, Single Instructor Records [page 13]
   Edit single instructor records when you need to make a slight adjustment to an instructor record.
8. Security Personas in SAP SuccessFactors Learning [page 17]
   Users can have three personas in the SAP SuccessFactors Learning: Learner, Instructor, and Administrator.
9. Instructors [page 19]
   Instructors are people who you can assign to instructor led courses in SAP SuccessFactors.

2.1 Importing Instructors

Import instructors with *Import Data* upload instructor information in bulk.

Prerequisites

To use the data import tool, you must have Microsoft Excel installed on your computer.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *System Management Tools* > *Import Data*.
2. Select *Download Template*, select *Instructor* in *Record Type*, and then click *Submit*.

   You download the Microsoft Excel spreadsheet template for instructors.
3. If you don't see the comments in Microsoft Excel, show the comments.

   See Microsoft Excel help to learn how to show comments.
4. Edit the spreadsheet with the instructor information, and when your are done, save it.

   Each row on the spreadsheet is an instructor.
5. Go back to *System Administration* > *System Management Tools* > *Import Data*.
6. Select *Import Data* and select *Instructor* in *Record Type*.
7. Select *Import Option*.
   - *Add*: The tool adds new instructor records from the spreadsheet. If an instructor in the spreadsheet already exists, that instructor's row is rejected and returned as an error in the log.
   - *Update*: The tool updates instructor records. If the spreadsheet includes a new instructor ID (one that isn't in the system), the tool ignores the row.

- *Add and Update*: The tool adds instructors that don't exist yet and updates instructors from the spreadsheet who do exist.

8. Select a time zone in *Time Zone ID*. The creation or update date of the instructor is recorded in this time zone.
9. Click *Submit*.

Next Steps

Go to *Admin* > *Reports* and run the Instructor Data report. Check the instructor records to see your latest changes. If you want to edit an instructor after import, go to *Learning* > *Instructors*.

Task overview: Adding Instructors to SAP SuccessFactors Learning [page 6]

Next task: Creating an Instructor Role [page 8]

2.2 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.

Permission	Description
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.

Task overview: Adding Instructors to SAP SuccessFactors Learning [page 6]

Previous task: Importing Instructors [page 7]

Next task: Enabling QR Codes to Record Attendance [page 9]

Related Information

Security Personas in SAP SuccessFactors Learning [page 17]

2.3 Enabling QR Codes to Record Attendance

Enable QR codes to allow instructors to record users' attendance in their courses by scanning a code that is sent to them in an enrollment email notification or on their mobile devices with the SAP SuccessFactors app.

Prerequisites

To use QR codes, your organization should have the following in place:

- The instructor dashboard accessible to instructors

- The record attendance permission for instructors
- Hardware for the instructor to read the QR Codes (an iPad)
- Enrollment notifications for users who don't have the SAP SuccessFactors on their mobile device (users can print the QR code with their enrollment notification)

Context

> **Note**
>
> QR codes can mark attendance, but they don't post completion. For users to be marked complete, another step is required. Depending on your configuration, the instructor can mark them complete or a learning administrator marks them complete.

Procedure

1. Log in to the SAP SuccessFactors Learning administration environment.
2. Go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.
3. Verify that *Enable Vcalendar attachments* is selected.

   QR codes are part of the attachments in enrollment notifications. If you don't enable the calendar attachments, users never receive their QR codes.
4. Go to *System Administration* > *Configuration* > *Global Application Settings* > *Global Application Settings*.
5. Select *Enable QR Codes*.

Task overview: Adding Instructors to SAP SuccessFactors Learning [page 6]

Previous task: Creating an Instructor Role [page 8]

Next task: Enabling Instructors to Post Learning for Impromptu Training [page 11]

2.4 Enabling Instructors to Post Learning for Impromptu Training

Enable instructors to post learning for Impromptu training to accommodate organizations that call for a trainer and training event without formally scheduling it in the Learning Management System (LMS).

Context

When instructors use the mobile instructor app, they can post learning for "spot classes" if they're authorized to teach them. A "spot class" is a class that wasn't formally scheduled. For example, if a colleague stops by an instructor's desk and asks the instructor to lead a course without first formally scheduling it in the Learning Management System (LMS), that is a "spot class."

Procedure

1. Go to *People* > *Instructors*.
2. Find and open the instructors that should be allowed to post learning for spot classes.
3. Go to *Authorized to Teach*.
4. Verify that the instructors are authorized to teach the potential spot classes.

   If an instructor is authorized to teach a learning item, then the instructor can post users' learning results (record learning) for those learning items when they aren't formally scheduled in the LMS. This can be accomplished from the *My Classes* > *Authorized to Teach* tab where the Items will show up and a Record Completion button will be present.
5. Click *Apply Changes*.

Next Steps

Repeat the process for all instructors who should be able to post learning results for spot classes.

Task overview: Adding Instructors to SAP SuccessFactors Learning [page 6]

Previous task: Enabling QR Codes to Record Attendance [page 9]

Next task: Assigning the Instructor Role [page 12]

2.5 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.

Task overview: Adding Instructors to SAP SuccessFactors Learning [page 6]

Previous task: Enabling Instructors to Post Learning for Impromptu Training [page 11]

Next task: Assigning a Related User to Instructors [page 13]

2.6 Assigning a Related User to Instructors

Assign related users to instructors so that instructors can log in to the instructor dashboard (*My Classes*).

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *People* > *Instructors*.
2. Find and open the instructor who you want to edit.
3. In *Summary*, add the associated user in *Related User*.

Task overview: Adding Instructors to SAP SuccessFactors Learning [page 6]

Previous task: Assigning the Instructor Role [page 12]

Next task: Editing Basic, Single Instructor Records [page 13]

2.7 Editing Basic, Single Instructor Records

Edit single instructor records when you need to make a slight adjustment to an instructor record.

Context

After implementing instructors for SAP SuccessFactors Learning, you might need to adjust a single instructor's record.

Procedure

1. Log in to the SAP SuccessFactors Learning administration environment.
2. Go to *Learning* > *Instructors*.
3. Search for the instructor whose record you need to change.

4. Click *Edit* to edit the instructor's record.
5. **Optional:** Click the help button for field help on any of the tabs.

Task overview: Adding Instructors to SAP SuccessFactors Learning [page 6]

Previous task: Assigning a Related User to Instructors [page 13]

Next: Security Personas in SAP SuccessFactors Learning [page 17]

Related Information

Importing Instructors [page 7]
Instructor Identity and Access Fields [page 14]
Adding Custom Field Values to Instructors [page 16]
Adding Instructor Shipping Information [page 16]

2.7.1 Instructor Identity and Access Fields

Summary fields contain instructors' identity and access fields.

Field	Description
Company	If you use instructors from a different company, then you can enter it so that you can find, report, and track that information.
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.
Organization	If your company uses instructors who belong to different organizations, then you can associate the instructor with that specific organization. The main reason for associating an instructor with an organization is to assist with finding, reporting on, and tracking the instructor through the association with the organization.
Time Zone	You can associate an instructor with a time zone to help other administrators determine if this instructor is suitable to lead a class, which is also associated with a time zone.

Field	Description
Email Address	Enter the instructor email addresses so that they can receive important notifications. Their email addresses appear in any reports that include the instructor's contact information.
Comments	Use the *Comments* box to identify the purpose or intent of the record. You can also include any information that you think other administrators might need or find useful for understanding the record and how to use it. For example, if you're working with a user record and the user is on extended leave, you can note the reason for the leave and the date you expect the user to return. Likewise, if you're working with an item or class record, you can note why you created or modified the record. All comments are intended for administrators only and cannot be viewed in the user interface.
Active	When a record is inactive, most of the system does not include that record in searches or reports. Some searches and reports allow administrators to include inactive records. Deactivating (instead of deleting it) hides it from view but keeps it for historical record. Because you cannot restore a deleted record, we recommend that you delete a record when you make a mistake (for example, if the record ID is simply incorrect) or as part of your data privacy practice.
Instructor Biography	Write a few key sentences about instructors as a biography. You can use up to 4000 bytes. Click to translate the biography so that users of many languages can read the biography. **Note** You can enter over 4000 bytes in the biography field, but when you save, it truncates 4000 bytes.
Related Instructor/Related User	Instructors have a related user ID because the user ID is the primary identity of the person. For example, to enter an e-signature, we use the user identity not the instructor identity.
Role	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.

2.7.2 Adding Custom Field Values to Instructors

Add custom fields to instructors so that you can filter a list of instructors by an attribute that makes sense for your business.

Prerequisites

Before you can add custom field values to instructors, you first declare the custom fields that you want to track. Go to *System Administration* > *Custom Fields*.

Context

To find instructors, it often helps to have custom information. For example, we don't provide a field for advanced degrees. But if you want to find instructors based on whether they have advanced degrees, you can add a custom field and store whether each individual instructor has an advanced degree. You can then search by it to find all instructors who have advanced degrees.

Procedure

1. Go to Learning Administration, and then go to *People* > *Instructors*.
2. Search for the instructor who you want to edit.
3. Go to *Custom Fields* and then change the values of the custom fields.
4. When you're finished, click *Apply Changes*.

2.7.3 Adding Instructor Shipping Information

Add instructor shipping information so that you know where to ship materials that they need for their courses.

Context

Instructor shipping information is different from their work location or their home address. Often, you ship course materials to an address of a training facility or to an office near the instructor because course materials can be bulky. The telephone, fax, and email are often **not** the telephone fax, and email of the instructor. They can be a person in receiving at the location where you're shipping.

Procedure

1. Go to Learning Administration, and then go to *People* > *Instructors*.
2. Search for the instructor who you want to edit.
3. Go to *Shipping Info* and then add the shipping and shipping contact information.
4. When you're finished, click *Apply Changes*.

Next Steps

Later, you can look up the instructor's shipping information. You can see it in the Instructor Data report.

2.7.4 Basic Instructor Data

Use the data import tool to import basic instructor data.

Basic instructor data includes summary information, proctor information, custom data, and shipping information. This information forms the baseline for the rest of the instructor data. To the baseline data, you can add additional information like Virtual Learning Service (VLS), commerce data, and so on. After you import the basic data to create the instructor records, you can add the additional data in *Learning* > *Instructors*.

Related Information

Importing Instructors [page 7]
Editing Basic, Single Instructor Records [page 13]
Instructor Identity and Access Fields [page 14]
Adding Custom Field Values to Instructors [page 16]
Adding Instructor Shipping Information [page 16]

2.8 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.

Parent topic: Adding Instructors to SAP SuccessFactors Learning [page 6]

Previous task: Editing Basic, Single Instructor Records [page 13]

Next: Instructors [page 19]

2.9 Instructors

Instructors are people who you can assign to instructor led courses in SAP SuccessFactors.

An instructor is an assignable teaching resource. As instructors join and leave your organization, and as they change, you can maintain their records.

Instructors are optional and you do not need to take advantage of all the configuration opportunities. For example, if you do not use virtual training, you do not need to set instructors up with VLS accounts.

Parent topic: Adding Instructors to SAP SuccessFactors Learning [page 6]

Previous: Security Personas in SAP SuccessFactors Learning [page 17]

2.9.1 The Benefits of Creating Instructor Records

Add instructors to SAP SuccessFactors Learning so that both you and the instructors can track their schedules and more easily integrate with tools (like virtual learning).

You identify instructors in *People* > *Instructors*. Once identified in the system, you can manage the workload of the instructor.

- You can assign the instructor to courses so that participants can see who is teaching them and instructors can see the list of courses they are to teach.
- You can provide a biography for the instructor so that users can see their instructors' experience and qualifications.
- You can authorize instructors to teach courses so that you can find a well-trained instructor to lead your courses.
- You can assign the instructor to a Virtual Learning Service (VLS) system like WebEx or Adobe Connect so that instructors can launch virtual learning and the system can track the sessions.
- You can assign costs to using the instructor to better balance your training budget.
- You can assign an instructor as a proctor for exams so that your exams are supervised.

Instructors are optional records in SAP SuccessFactors Learning and you do not need to take advantage of all the configuration opportunities. For example, if you do not use virtual training, you do not need to set instructors up with VLS accounts.

2.9.2 Instructor Authorization to Teach

When you mark an instructor as authorized to teach a course, you declare that the instructor is qualified instructors teach its content.

To prevent learning administrators from accidentally assigning an unqualified instructor to a course, you can mark instructors as authorized to lead a course. How you define **authorized to teach** is up to your organization, but in most cases, the authorization is based on an industry qualification. For example, to teach Cardiopulmonary Resuscitation (CPR), the instructors need to be granted qualification. In the United States, for example, you can become a qualified CPR instructor through the American Red Cross.

You can authorize an instructor to teach an item in two places: on the item record (*People* > *Instructors*) or the instructor record (*People* > *Instructors* > *Authorized to Teach*).

Authorized Instructors Can be Primary Instructors

Authorized instructors can be added as the **primary** instructor for class time slots based on the learning item that they're authorized to teach. For example, if you authorize an instructor to teach a CPR learning item, then that instructor can be the primary instructor for any class based on the CPR learning item. The secondary instructors aren't checked for authorization to teach so that more junior instructors can shadow more senior, qualified, instructors.

> **Note**
>
> Learning administrators **can** save and schedule the time slot with an unauthorized primary instructor. The learning administrator is warned but not prevented from saving the schedule.

Authorized Instructors can Post Spot Classes

When instructors use the mobile Instructor app, they can post learning for spot classes **if** they're authorized to teach them. A spot class is a class that wasn't formally scheduled. For example, if a colleague stops by an instructor's desk and asks the instructor to lead a course without first formally scheduling it in the Learning Management System (LMS), that is a spot class.

Authorized Instructors can Proctor Exams

You can limit the proctors of exams to only instructors who are authorized to teach the learning item. Authorization can be important to proctoring if the exam leads to a certification. You might want the instructor to know how to work with participants during the proctored exam.

2.9.3 Instructor Virtual Classrooms

When you configure Virtual Learning Servers (VLS) for instructors, you enable instructors to launch VLS sessions from the instructor view, and you're better able to track their virtual training.

Many companies conduct training in virtual meeting rooms like WebEx or Adobe Connect. Instructors often use their own personal accounts and often need to keep track of their account information, the length of the session, and so on. When you configure instructors for VLS, you relieve them of the responsibility for managing their accounts. You create an account that they use when they're acting as an instructor (as opposed to their personal accounts that they use when acting as an employee).

You can use an instructor's *VLS Settings* to update the VLS settings for an instructor (*People* > *Instructors* > *VLS Settings*). The VLS tab only applies if vleEnabled=true in the LMS_ADMIN configuration (*System Administration* > *Configuration* > *System Configuration*).

2.9.4 Legacy Proctored Exams

Some companies require exams to be overseen by proctors. Proctors are responsible for the rules of an exam and for overseeing students during an exam.

When an exam is proctored, an instructor must be present for the exam. The proctor is present to enforce rules of the exam, watch for honesty among the exam takers, and answer questions about the equipment and environment used to administer the exam.

When an exam is proctored, before the employee can begin it, the system prompts employees for a proctor ID and a proctor code. The employees call the proctor to their workstations, and the proctor enters his or her User ID and a proctor code. As a learning administrator, you generate the proctor codes on the instructor record as part of the instructor's proctor status.

> **Note**
>
> Instructors can also participate in courses and take exams. Instructors cannot proctor for exams they are taking as a participant of a course.

2.9.5 Instructor Regions

When you associate instructors with regions, you can better plan their training calendar by assigning them to teach courses in the region's training facility.

You define regions during implementation. They are the geographic locations where you have training facilities. You assign instructors to regions so that you can search for instructors by region, find instructors near the training facility, and assign them to courses in that training facility.

2.9.6 Instructor Biography

Instructor biographies increase learner interest in courses because they can see who will be teaching a course.

Instructor biographies motivate your employees to enroll in courses. Employees see the instructor biography when they click an instructor's name in the instructor tile. If they see an instructor who interests them, they are more likely to enroll in the course. Write instructor biographies in *Learning* > *Instructors* > *Summary*.

2.9.7 Instructor Cost Structure

If you create records for your instructors in SAP SuccessFactors Learning, you can track their costs by building a cost structure.

SAP SuccessFactors Learning tracks instructor costs by building a cost structure from a baseline to create a total cost:

1. The baseline cost is called *Base Cost*. It's the cost to assign the instructor to teach any learning event: seminar, virtual learning, classroom training, or any other type of event that the instructor attends.
2. You can substitute an *Item Costs* for the base cost of an instructor for any particular learning item. Some learning items can cost more for an instructor (high demand learning items, for example).
3. To the base and item cost, you can add*Additional Costs*. The additional cost is any cost added to the base and item cost for the instructor. For example, additional costs could be travel expenses for an in-person training event. The additional costs wouldn't be added to a virtual training event.

3 Designating Instructors as Proctors

When you designate instructors as proctors, they can oversee exams.

If you need to supervise your employees' exams, you can designate instructors as proctors. You give instructors proctor codes, which unlock exams for participants and track the person acting as the proctor. After you designate proctors, you must also configure your exams to be proctored exams.

3.1 Types of Proctor Codes

When learning administrators generate proctor codes, they choose between the types of codes: proctor super codes and time-sensitive codes.

Instructors need proctor codes so that they can unlock proctored exams for users. You decide how to provide a proctor code: using a proctor super code, generating time-sensitive proctor codes for each day, or both.

> ⓘ Note
>
> Instructors can also participate in courses and take exams. Instructors cannot proctor for exams they are taking as a participant of a course.

Super Proctor Codes are Unique to an Instructor

A proctor super code is useful because an instructor can use it for any user, with any exam, and on any day. The proctor super code changes only when an administrator changes or removes it from the *Proctor Super Code* box.

For security reasons, we recommend that you treat proctor super codes as passwords:

- Reset the proctor super code frequently.
- Make each proctor super code unique to a single instructor so that only that one instructor can use that one proctor super code.

Time-Sensitive Proctor Codes are Unique to an Instructor and a Day

Time-sensitive proctor codes are more secure because they're valid only for a particular time, but they're more difficult to manage because instructors must know their proctor code for a given day. You can print the codes and provide instructors with a copy of their codes, but there's a chance that the instructor could lose them. We recommend time-sensitive codes in strict exam environments.

Related Information

Generating Proctor Codes For Instructors [page 24]
Sending Proctor Codes to Instructors [page 25]

3.2 Generating Proctor Codes For Instructors

Generate proctor codes for instructors so that they can begin proctored exams for your employees.

Context

If your company uses proctored exam objects, then employees cannot start an exam without a proctor present. Proctors identify themselves by entering their instructor ID and a proctor code. The exam starts only after it has received a correct proctor ID and code.

> **Note**
>
> Instructors can also participate in courses and take exams. Instructors cannot proctor for exams they are taking as a participant of a course.

Procedure

1. Go to *People* > *Instructors* and find the instructors who should be proctors.
2. For each instructor, select *Instructor is a proctor*.
3. To give the instructor a proctor super code, type it in the *Proctor Super Code* box.

   A proctor super code is useful because an instructor can use it for any user, with any exam, and on any day. The proctor super code changes only when an administrator changes or removes it from the *Proctor Super Code* box.
4. To give the instructor time-sensitive codes, click *Generate Codes*.

   Time-sensitive proctor codes are more secure because they're valid only for a particular time, but they're more difficult to manage because instructors must know their proctor code for a given day. You can print the codes and provide instructors with a copy of their codes, but there's a chance that the instructor could lose them. We recommend time-sensitive codes in strict exam environments.

   The system generates a different code for every day of the next year (365 days).

Next Steps

Send the proctor codes to the instructor.

Related Information

Types of Proctor Codes [page 23]
Legacy Proctored Exams [page 21]
Creating Legacy Proctored Exams [page 29]

3.3 Sending Proctor Codes to Instructors

After you generate proctor codes, send them to the instructors so that they have the code that unlocks exams for employees.

Prerequisites

Before you can send proctor codes, generate them.

Context

If your company uses proctored exam objects, then employees cannot start an exam without a proctor present. Proctors identify themselves by entering their instructor ID and a proctor code. The exam starts only after it has received a correct proctor ID and code.

> **Note**
>
> Instructors can also participate in courses and take exams. Instructors cannot proctor for exams they are taking as a participant of a course.

Procedure

1. Go to *People* > *Instructors* and find the instructors who should be proctors.
2. For each instructor, go to *Proctor Status*.
3. Click *Print Codes*.

The system generates a PDF report with the instructor's proctor codes. If you have used time-sensitive codes, the report can take some time to run.

4. Email the report to the instructor.

Related Information

Generating Proctor Codes For Instructors [page 24]
Types of Proctor Codes [page 23]
Creating Legacy Proctored Exams [page 29]
Purging Instructor Proctor Codes [page 26]
Deleting Instructor Proctor Codes [page 27]

3.4 Purging Instructor Proctor Codes

Purge instructor proctor codes if you need to provide the automatically generated proctor codes to an instructor again.

Context

By purging old proctor codes, you reduce the length of the report and the number of pages that you need to print.

Procedure

1. Go to Learning Administration, and then go to *People* > *Instructors* and find the instructors whose codes you need to purge.
2. Go to *Proctor Status*.
3. Click *Purge Codes*.

   The system removes all of the automatically generated proctor codes up to, but not including, the current date for this instructor.
4. Change the text in the *Proctor Super Code* box.

   Although this step isn't strictly necessary, you often purge codes when you want to send them to an instructor again, and you often send them to an instructor again when he or she has forgotten or lost the codes. If you're using generated, time-sensitive codes and you are using super codes, consider changing the proctor super code at this time.

3.5 Deleting Instructor Proctor Codes

Delete instructor proctor codes when you want to remove all automatically generated proctor codes for an instructor.

Context

If you need to remove all proctor codes (past, present, and future) from an instructor, you delete them. For example, if an instructor leaves the role of instructor and you want to secure all the proctor codes, you can delete them.

Procedure

1. Go to Learning Administration, and then go to *People* > *Instructors* and find the instructors whose codes you need to delete.
2. Go to *Proctor Status*.
3. If you see proctor codes under the days of the calendar, click *Delete Codes*.

   The codes that appear under the days of the calendar are time-sensitive codes.

   The system removes all of the automatically generated, time-senstive proctor codes for this instructor.
4. Delete any text in the *Proctor Super Code* box.
5. Clear the *Instructor is Proctor* box.

   Although this step isn't strictly necessary, you often delete proctor codes when you no longer want an instructor to act in the role of a proctor. By clearing *Instructor is Proctor*, you remove the proctor privileges from the instructor.
6. Click *Apply Changes*.

3.6 Instructor's Proctor Status Fields

Use the instructor's proctor status to help instructors with their proctor codes.

In *People* > *Instructors* > *Proctor Status*, you manage proctor codes for instructors. Instructors with proctor codes can oversee employees' exams. If you have exams that require a proctor, you must have at least one instructor set up as a proctor.

This Field....	...Is used as follows
Instructor is a proctor	If you select *Instructor is a proctor*, the instructor is available to proctor exams. Proctors assure that rules are followed during an exam. **Note** Instructors can also participate in courses and take exams. Instructors cannot proctor for exams they are taking as a participant of a course.
Proctor Super Code	To assign a proctor super code to the instructor, type it in the *Proctor Super Code* box. A proctor super code is useful because an instructor can use it for any user, with any exam, and on any day. The proctor super code changes only when an administrator changes or removes it from the *Proctor Super Code* box.
Generate Codes, Purge Codes, Delete Codes, and Print Codes	The links in the calendar create, purge, delete, and print time-sensitive proctor codes. Time-sensitive proctor codes are more secure because they're valid only for a particular time, but they're more difficult to manage because instructors must know their proctor code for a given day. You can print the codes and provide instructors with a copy of their codes, but there's a chance that the instructor could lose them. We recommend time-sensitive codes in strict exam environments.

Related Information

Working with Instructors' Proctor Codes

Types of Proctor Codes [page 23]
Generating Proctor Codes For Instructors [page 24]
Sending Proctor Codes to Instructors [page 25]
Purging Instructor Proctor Codes [page 26]
Deleting Instructor Proctor Codes [page 27]

Configuring Proctored Exams

Legacy Proctored Exams [page 21]
Settings for Proctored Legacy Exams [page 30]
Creating Legacy Proctored Exams [page 29]

3.7 Creating Legacy Proctored Exams

Create proctored exams when you want strict supervision of your employees' exams.

Prerequisites

Before you can create proctored exams, you need:

- Questions and an exam to be proctored
- A learning item with the exam associated with it
- Instructors managed in the system (*People* > *Instructors*)

Context

Proctored exams require an instructor to be present during the exam. The proctor can assure that all rules are followed during the exam.

Procedure

1. Go to *People* > *Instructors* and search for the instructors who are proctors.

   > **Note**
   >
   > Instructors can also participate in courses and take exams. Instructors cannot proctor for exams they are taking as a participant of a course.

2. From the *Search Results*, select the required instructor, and choose
3. Select *Proctor Status* and choose *Edit*.
4. Select *Instructor is a proctor*, and generate the proctor code for the instructor:
   - Enter a super code in the *Proctor Super Code* box. A super code is valid for a proctor until you, as a learning administrator, change it. For ease of management, we recommend super codes in all but the most strict exam Administration environment.
   - Choose *Generate Codes*. When you choose *Generate Codes*, the system generates a unique code for every calendar day. We recommend that you generate codes when you have strict exam environments.
5. If you plan to grant proctor responsibilities to instructors who are authorized to teach a learning item, go to *People* > *Instructors* > *Authorized to Teach* and double-check the learning items that the instructor is authorized to teach.

   For each exam, you can require that the instructor who is acting as the proctor have authorization to teach the learning item for the exam. At run time, when instructors enter their user ID and proctor code, the system

checks to see if the user (instructor/proctor) is authorized to teach the learning item containing the exam. If the instructor isn't authorized to teach it, the exam can't start.

6. Go to *Content* > *Exams Objects (Legacy)* and search for the exams that need proctors.
7. For each exam, go to *Summary* and select *Proctor code is required to begin the exam*.

   When you select *Proctor Code is required to begin the exam*, a proctor must enter a valid proctor code before any user can begin this exam or survey.
8. If you would like to grant proctor responsibilities to instructors who are authorized to teach a learning item, select *Proctor must be authorized instructor for Item*.

   When you select *Proctor must be authorized instructor for Item*, the system verifies that the proctor is authorized to teach the learning item. When the proctor enters his or her user ID and the proctor code, the system checks that the user ID is listed as authorized to teach the learning item that the exam is associated with.
9. If you would like to alert proctors to a failed exam, select *Notify proctor*.

   The *Notify proctor* setting is applicable only when users have failed the overall exam. When users fail the exam, their workstation locks and the user sees the message you specify in the *Content* > *Exam Objects (Legacy)* > *Messages* > *Proctor Code Required on Failure Message*. A proctor must enter a valid proctor code to unlock the users' workstations.
10. Go to *Exam Objects (Legacy)* > *Messages*, and type text to display the proctor messages in *Proctor Code Required for Exam Entry Message*, and *Proctor Code Required on Failure Message*.

    This text helps employees understand why they're presented with a screen that asks for a proctor code.

Related Information

Settings for Proctored Legacy Exams [page 30]
Instructor's Proctor Status Fields [page 27]
Generating Proctor Codes For Instructors [page 24]
Sending Proctor Codes to Instructors [page 25]
Purging Instructor Proctor Codes [page 26]
Deleting Instructor Proctor Codes [page 27]

3.7.1 Settings for Proctored Legacy Exams

There are three key settings that you must configure in the summary field settings for the exam objects for proctored exams.

These settings apply when you want a proctor to oversee the exam. A proctor code is required based on the settings of the exam object in *Content* > *Exam Objects (Legacy)* > *Summary*.

> **Note**
>
> Instructors can also participate in courses and take exams. Instructors cannot proctor for exams they are taking as a participant of a course.

This field...	Is used as follows...
Procter Code is required to begin the exam	When you select *Proctor Code is required to begin the exam*, a proctor must enter a valid proctor code before any user can begin this exam or survey.
Procter must be authorized for Item	When you select *Proctor must be authorized instructor for Item*, the system verifies that the proctor is authorized to teach the learning item. When the proctor enters his or her user ID and the proctor code, the system checks that the user ID is listed as authorized to teach the learning item that the exam is associated with.
Notify proctor	The *Notify proctor* setting is applicable only when users have failed the overall exam. When users fail the exam, their workstation locks and the user sees the message you specify in the *Content* > *Exam Objects (Legacy)* > *Messages* > *Proctor Code Required on Failure Message*. A proctor must enter a valid proctor code to unlock the users' workstations.

4 Instructors Leading Virtual Training

If you configure your instructors for virtual learning, they can launch their classes directly from their instructor page.

If your instructors lead training in virtual meeting rooms like WebEx or Adobe Connect, consider managing their accounts through SAP SuccessFactors Learning. When you manage their accounts through SAP SuccessFactors Learning:

- Instructors can see their upcoming training events and launch their virtual training events from the instructor view.
- Instructors do not need to use their personal WebEx or Adobe Connect accounts for their instruction.
  - When instructors launch training events from the Instructor page, they use their training account.
  - You have control over the training account: you can turn it off without impacting an instructor's personal account.
- The system can track attendance in the virtual training event for some VLS vendors.
- Users can launch virtual training from their *My Assignments* tile.

> **Note**
>
> Implement VLS before you configure instructors for virtual learning. Read the VLS implementation guide for help.

4.1 Configuring Instructors for VLS

Configure instructors for virtual learning events.

Prerequisites

Enable the VLS server: Enabling the Virtual Learning Service

Add your instructors to SAP SuccessFactors Learning: Adding Instructors to SAP SuccessFactors Learning [page 6] Your instructors must be tracked in the system for VLS to work properly.

Procedure

1. Go to Learning Administration, go to *People* > *Instructors*, and then search for the instructor who should have access to VLS.

2. Go to *Summary* to verify that the instructor record has a first name, last name, and email address.

   These fields are required to maintain VLS accounts in SAP SuccessFactors Learning.

3. Go to *VLS Settings*.

   VLS Settings contain the VLS servers that you created when you configured your instance of VLS.

4. In *Account ID*, type the instructor's virtual meeting room ID. If the instructor doesn't yet have an account, type the account ID that you want the instructor to have.

   > **Note**
   >
   > For Microsoft Teams virtual learning sessions, if the instructor has a different email address in Microsoft Azure than the one in the *Summary* tab, it **must** be provided in the Teams *Account ID* field in order for Microsoft Teams virtual time slot attendance to be properly processed.

5. If the *Account Password* field is available, enter the instructor's virtual meeting room password.

   > **Note**
   >
   > The *Account Password* field is only shown if required by the VLS vendor. If required, the password must conform to password rules set by the meeting room vendor.

6. In *Action*, select what should happen when you apply the changes.

Option	Description
Create New Account	Create a new account for the instructor on the VLS server. This option is only available for some VLS vendors.
Use Existing Account	Tests the credentials of the instructor. If you type an incorrect *Account ID* or *Account Password* the system warns you.

7. Choose *Apply Changes*.

Next Steps

You can now set up virtual time slots and assign the instructor as the primary instructor for the time slot.

4.2 Enabling Instructors to Change their VLS Passwords

Enable instructors to change their Virtual Learning Service (VLS) passwords if their meeting room accounts are personal accounts that they want to keep private.

Context

If you integrate SAP SuccessFactors Learning with a Virtual Learning Service (VLS), you can either require learning administrators to manage instructor passwords, or you can allow instructors to manage their own passwords. If the instructors' accounts are for the express purpose of conducting training and **not** the instructors' personal meeting room account, then you might want a learning administrator to manage the account passwords. But if the meeting room accounts are instructors' accounts, you should enable them to manage the password. You might also enable instructors to manage their own passwords to remove a bottleneck in your process.

> **Note**
>
> Even if the accounts are for the express purpose of training and they **aren't** the instructors' personal accounts, consider giving your instructors management responsibility to reduce workload on your administrators.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Security* > *Role Management*.
2. Find and open the role you're using for your instructors.
3. Open *Permissions*.
4. Add the *Edit Virtual Learning Account* permission.

4.3 Adding a Virtual Time Slot

Add a time slot as a virtual time slot when you want users to meet for a virtual learning event.

Prerequisites

Enable the VLS server: Enabling the Virtual Learning Service

A virtual time slot must be started by an instructor, so you must create at least one instructor with VLS privileges, authorize the instructor to teach the course, and add the instructor as a resource to the virtual time slot.

To register for a class that has a virtual time slot, users must have a valid email address in Learning. The user receives an email containing the URL to join the session. It's required, even if the VLS is configured not to use email for authentication.

Procedure

1. Go to *Learning Activities* > *Classes* > *Agenda* and then choose + *(Add Time Slot)*.
2. Schedule the time slot.
3. In the Resources section, use the dropdown list and select *Add Instructor* to add an instructor who can launch the virtual time slot.
4. Set the *Virtual* switch to *On*.
5. In *VLS Server*, select the specific server configuration for the virtual meeting room vendor to use for this virtual learning.
6. To allow non-Learning attendees (those **not** listed in *People* > *Users*) to log in to the virtual meeting room, enter a password in *VLS Password*.

   When users who are registered for the class in Learning enter the meeting room through a link in an email message from the Learning Management System (LMS) or through their *My Assignments* tile, they're authenticated through the LMS. Non-Learning attendees can't be authenticated through the LMS and therefore need a password.

   For Microsoft Teams or Webex Meeting Center virtual meeting rooms, the VLS doesn't have an option to set a password for event registration.

   > ⓘ Note
   >
   > Attendance **isn't** tracked in the LMS for non-Learning attendees.

7. In *Session Details*, provide any information you'd like to be included in the email notification for this virtual learning session.
8. Choose *Save*.

Results

If you're using the instructor dashboard, instructors who are a part of the virtual time slot see a launch course link in *My Classes* on the day of the event.

4.4 Configuring VLS Time Slots to Add Learning History Records

Configure VLS time slots to add learning history records so that internal users receive credit for attendance.

Prerequisites

Enable the VLS server: Enabling the Virtual Learning Service

Create at least one virtual time slot for the class. Without a virtual time slot, you can't add learning history records.

Configure the VLS attendance processing Automatic Process Manager (APM): *System Administration* > *Automatic Processes* > *Process VLS Attendance*

Context

By configuring VLS time slots to add learning history records, you can assure that participants in virtual time slots have been in the virtual room for a set period of time before they're marked complete.

Procedure

1. Go to *Learning Activities* > *Classes* and search for a class then choose *Edit*.
2. On the *Details* tab, set *Automatically add to learning history as part of VLS Attendance Processing*.

Option	Description
`Active`	We recommend setting to `Active` so that the VLS Attendance Processing can automatically add learning history records for virtual time slots.
`Inactive`	If you set to `Inactive`, then you must use some other mechanism, like one of the Add Learning History wizards, to add learning history records fro virtual time slots. Instead of automatically reading the attendance from the meeting room vendor, you need to run a report from the vendor and select users who attended.

3. Set *Minimum Attendance Percentage for Credit*.

   Although you aren't required to set *Minimum Attendance Percentage for Credit*, you gain some advantages with virtual learning. The system calculates attendees' participation time by dividing the total time of the session (as determined by when the instructor launched and ended it) into the time that a user spent in the session.

> **Note**
>
> If there is more than one time slot associated with a class, the users needs to meet the minimum attendance percentage for the aggregate of all time slots in order to receive attendance credit for the class.

4. Set *For Credit Completion Status* and *Non-Credit Completion Status*.

   You set these two fields so that the VLS attendance processing APM can determine what status to assign to attendees.

5. Choose *Save*.

5 Implementing Cost Structures for Instructors

By creating a cost structure for instructors, you track the training costs to your organization for engaging instructors.

A cost structure for instructors should be part of a larger commerce strategy. We recommend, therefore, that you set up your commerce system before you set up your instructor cost structure.

When you create your cost structure for instructors, consider how exact your cost tracking should be. Many customers can track instructor base and ignore item cost and additional costs. This simplifies the cost structure by tracking a single cost per instructor, instead of tracking per instructor delivering individual learning items.

5.1 Assigning Costs to an Instructor

Assign costs to an instructor to track the expense of including instructors in your courses.

Prerequisites

Before you assign costs to an instructor, we recommend that you set up your commerce references. In particular, consider setting up cost names before you set up instructor costs. To set up cost names, go to *References* > *Finance* > *Cost Names* > *Summary*.

If you plan on using item costs, create a list of the learning items, per instructor, that should differ from the default cost of the instructor. For example, your default, or base cost for the instructor might be $500 per hour. But you might have a set of learning items that are more expensive because they are in more demand or are more difficult for the instructor (maybe they take longer to prepare for). Make a list of those learning items so that you can find them when you create item costs.

Procedure

1. Go to Learning Administration, and then go to *People* > *Instructors*.
2. Find and open the instructor that you want to edit.
3. Go to *Base Costs* to assign a base cost for the instructor.

   A base cost is the default cost of assigning the instructor to a class. Many customers can use default, base costs and ignore item and additional costs. This simplifies your cost structure. We recommend that you assign a cost name so that you can better track and report on instructor costs.

4. Go to *Item Costs* to set up per learning item overrides on the base cost for the instructor.

   SAP SuccessFactors picks either a base cost or an item cost at the time that the instructor is assigned to the class.
5. Go to *Additional Costs* to assign additional costs.

   Additional costs are added to either the base cost or item cost.

5.1.1 Instructor Base Costs

Instructor base costs are a baseline amount that an instructor costs to conduct training.

Use *People* > *Instructors* > *Base Cost* to set the minimum amount that is usually charged for the instructor to teach courses. When a learning administrator associates the instructor with a time slot of a class, the system applies the **default** base cost of the resource to that class (*Learning Activities* > *Classes* > *Cost Summary*).

> **Note**
>
> If the instructor's currency is different from the course's currency (visible in *Learning Activities* > *Classes* > *Cost Calculation*), then the cost is zero for the instructor in that class.

Fields in Add a Base Cost by Amount and Unit of Measure

This field...	...Is used as follows
Amount	The amount of the cost. For example, if you are adding the base cost of an instructor, you type 1000 in *Amount* and the currency is U.S. Dollars, then you are saying that the base cost of the instructor is $100.
Currency	This is the currency that the cost will be measured in when transactions occur.
Unit of Measure	This is the unit of measure is the way that the cost is divided. For example, per day, per hour, per person, and so on.
Comments	In *Comments*, type text that will help other administrators understand the cost.

Fields in Add a Base Cost by Choosing a Cost Name

This field...	...Is used as follows
Cost Name	You can look up a predefined cost calculation in *Cost Name*. A system administrator creates company-approved costs names in ▶ *References* > *Commerce* > *Cost Names* > *Summary* ■. When you look up cost names, the search returns cost names that are assigned to the type of learning object. For example, if you search for cost names for instructors, the search returns only costs names created for instructors.
Currency	This is the currency that the cost will be measured in when transactions occur. It is inherited from the cost name.
Custom Cost Calculator	The cost calculator is inherited from the cost name. It describes how the cost is calculated.
Comments	In *Comments*, type text that will help other administrators understand the cost.

Edit the Base Cost for the Instructor

This field...	...Is used as follows
Allow override of default base cost at the time of scheduling	If you select the *Allow override of default base cost at time of scheduling* check box, then you allow other administrators to override these costs after they add this resource to a time slot of the class. To modify the cost of a resource on the Cost Summary tab of the class (▶ *Learning Activities* > *Classes* > *Cost Summary* ■), administrators must first expand the resource. Administrators can change the costs or select a non-default cost that was entered on the Base Cost tab of the resource by clicking the *Change to New Base Cost* link.
Default Cost	Objects can have more than one cost associated with them. Mark the default cost to signal that this is the cost of the object most of the time. When a learning administrator associates the instructor with a learning item, and if the learning item isn't listed in ▶ *People* > *Instructors* > *Item Costs* ■, then the instructor is added with the default base cost.
Propagate	The system applies the cost of a resource when you associate the resource with a time slot of the class. Therefore, if you later need to change something associated with the cost of the resource, then you must click the *Propagate* link. When you click the *Propagate* link, the system allows you to select how you want to apply the change to existing class records in SAP SuccessFactors Learning.

This field...	...Is used as follows
Comments	When you add each new cost, you can include a comment. If you want to review or update those comments, you can access any existing comments by clicking the *Comments* link in the row that is associated with that cost.

Related Information

Instructor Item Costs [page 41]
Instructor Additional Costs [page 43]

5.1.2 Instructor Item Costs

Instructor item costs are substituted for base costs. They represent the cost of an instructor per learning item.

Use *People* > *Instructors* > *Item Costs* to override the instructor base costs for particular learning items. You override base cost when the cost to deliver a learning item is higher for an instructor. For example, the item is in high demand or difficult to lead than it is for other learning items. At assignment time, SAP SuccessFactors Learning substitutes the base cost with the item cost according to assignment-time rules.

Add an Item Cost by Amount and Unit of Measure

This field...	...Is used as follows
Item Type ID and Item ID	The Item Type and Item ID uniquely identify the learning item that has the exceptional cost to the instructor. Don't use the'|' (Pipe) character while giving a name to the Item ID and Item Type ID.
Amount and Currency	The Amount and Currency together define the cost of the instructor for the learning item.
Unit of Measure	This is the unit of measure is the way that the cost is divided. For example, per day, per hour, per person, and so on.
Comments	Write comments to help other administrators understand the cost structure.

Add an Item Cost by Choosing a Cost Name

This field...	...Is used as follows
Item Type ID and Item ID	The Item Type and Item ID uniquely identify the learning item that has the exceptional cost to the instructor. Don't use the'|' (Pipe) character while giving a name to the Item ID and Item Type ID.
Cost Name	You can look up a predefined cost calculation in *Cost Name*. A system administrator creates company-approved costs names in *References* > *Finance* > *Cost Names* > *Summary*. When you look up cost names, the search returns cost names that are assigned to the type of learning object. For example, if you search for cost names for instructors, the search returns only costs names created for instructors.
Currency	The Amount and Currency together define the cost of the instructor for the learning item.
Custom Cost Calculator	The cost calculator is inherited from the cost name. It describes how the cost is calculated.
Comments	Write comments to help other administrators understand the cost structure.

Edit the Base Cost for the Instructor

This field...	...Is used as follows
Allow override of default base cost at the time of scheduling	If you select the *Allow override of default base cost at time of scheduling* check box, then you allow other administrators to override these costs after they add this resource to a time slot of the class. To modify the cost of a resource on the Cost Summary tab of the class (*Learning Activities* > *Classes* > *Cost Summary*), administrators must first expand the resource. Administrators can change the costs or select a non-default cost that was entered on the Base Cost tab of the resource by clicking the *Change to New Base Cost* link.
Default Cost	You see *Default Cost* after you click *Edit*. Objects can have more than one cost associated with them. Mark the default cost to signal that this is the cost of the object most of the time. When a learning administrator associates the instructor with a learning item, and if the learning item isn't listed in *People* > *Instructors* > *Item Costs*, then the instructor is added with the default base cost.

This field...	...Is used as follows
Execute Changes	You see *Execute Changes* after you click *Edit*. The system applies the cost of a resource when you associate the resource with an agenda of the class. If you change anything associated with the cost of the resource, then you must choose *Execute Changes*. Then the system allows you to select how you want to apply the change to existing class entities in SAP SuccessFactors Learning.
Comments	When you add each new cost, you can include a comment. If you want to review or update those comments, you can access any existing comments by clicking the *Comments* link in the row that is associated with that cost.

Related Information

How Instructor Cost is Decided at Assignment Time [page 44]

5.1.3 Instructor Additional Costs

Instructor additional costs are added to base or item costs.

Use *People* > *Instructors* > *Additional Costs* to record any costs charged over and above the base cost or item cost for the instructor (an additional cost could be, for example, the airfare for an instructor). When a learning administrator assigns the instructor to a class, the instructor's additional cost is added to the class (*Learning Activities* > *Classes* > *Cost Summary*).

> **Note**
>
> If the resource does not have an additional cost in the same currency that is selected in the *Cost Currency* list on the Cost Calculation tab of the class (*Learning Activities* > *Classes* > *Cost Calculation*), then the system displays an amount of zero for that resource in the class.

Fields in Add an Additional Cost by Amount and Unit of Measure

This field...	...Is used as follows
Amount	The amount of the cost. For example, if you are adding the base cost of an instructor, you type 1000 in *Amount* and the currency is U.S. Dollars, then you are saying that the base cost of the instructor is $100.

This field...	...Is used as follows
Currency	This is the currency that the cost will be measured in when transactions occur.
Unit of Measure	This is the unit of measure is the way that the cost is divided. For example, per day, per hour, per person, and so on.
Comments	In *Comments*, type text that will help other administrators understand the cost.

Fields in Add an Additional Cost by Choosing a Cost Name

This field...	...Is used as follows
Cost Name	You can look up a predefined cost calculation in *Cost Name*. A system administrator creates company-approved costs names in *References* > *Commerce* > *Cost Names* > *Summary*. When you look up cost names, the search returns cost names that are assigned to the type of learning object. For example, if you search for cost names for instructors, the search returns only costs names created for instructors.
Currency	This is the currency that the cost will be measured in when transactions occur. It is inherited from the cost name.
Custom Cost Calculator	The cost calculator is inherited from the cost name. It describes how the cost is calculated.
Comments	In *Comments*, type text that will help other administrators understand the cost.

5.2 How Instructor Cost is Decided at Assignment Time

When learning administrators assign instructors to learning items, SAP SuccessFactors Learning follows rules to assign costs for the particular instructor in the particular learning item.

When a learning administrator assigns an instructor to a learning item time slot, the following rules apply to your cost configuration:

- If the instructor doesn't have a default cost in the same currency that is in the *Learning Activities* > *Classes* > *Cost Calculation* > *Cost Currency*, then the system displays an amount of zero for that resource in the class.
- If the instructor record has both a base cost and an item cost in the same currency as the class, then the system replaces the default **base** cost with the default **item** cost when an administrator associates the class with this instructor. Administrators can validate this cost information in *Learning Activities* > *Classes* > *Cost Summary*.

- Although SAP SuccessFactors Learning allows you to add multiple costs (through the amount and unit of measure method, the cost name method, or a combination of the two), you can select only one default cost for each currency. When an administrator associates this resource with an agenda of a class, the system applies the **default** item cost of the resource to that class.
- If you select the *Allow override of default base cost at time of scheduling* check box, then you allow other administrators to override these costs when they add this resource to a time slot of the class. Before you can propagate an item cost or add and review comments, you must click the *Edit* link associated with the cost.

The *Execute Changes* action allows administrators to control how base cost updates are propagated when updating an instructor's base cost **after** they've been assigned to one or more classes.

Use the table below to determine how changes to the instructor's base cost changes will affect the Cost Summary for current classes based on the cost setup at the time of assignment:

Scenarios and Outcomes for Updating Base Cost

Instructor's Cost Setup at Time of Assignment	I want to...	Action Required	Resulting Change to Cost Summary for Current Classes
Only a base cost is set	...change the base cost and apply it to the instructor's current classes.	Choose *Execute Changes* and select *Apply Base Cost change to Current and Future learning*.	The Cost Summary for the instructor's current classes is recalculated to include the updated base cost.
Only a base cost is set	...change the base cost and apply it **only** to the instructor's future assignments.	Update the base cost and choose *Apply Changes*.	No change. Current classes will retain the original base cost set at the time of assignment.
Only an item cost is set	...apply a base cost to the Cost Summary for the instructor's current classes.	Update the base cost, then choose *Execute Changes* and select *Apply Base Cost change to Current and Future learning*.	The Cost Summary for the instructor's current classes is recalculated to include both the **existing item cost** and the **newly added base cost**.
A base cost and an item cost are set **Note** In this scenario, the Cost Summary only includes the **item cost** by default.	...apply a base cost to the Cost Summary for the instructor's current classes.	Choose *Execute Changes* beside the base cost and select *Apply Base Cost change to Current and Future learning*.	The Cost Summary for the instructor's current classes is recalculated to include both the **existing item cost** and the **newly added base cost**.

Related Information

Instructor Base Costs [page 39]
Instructor Item Costs [page 41]

6 Instructor Notifications

Design and use instructor notifications to alert instructors that they have been scheduled to lead a course.

Although instructors can see their upcoming training in the *My Classes* view, you don't want to rely on that view for notifications. If an instructor is scheduled to teach a new course, you want to push a notification to that instructor. The instructors want to see what they have been scheduled to teach and they want to block their calendars for the class.

As an administrator, you can trigger notifications based on the `InstructorAssignmentNotification` notification template. By default, the instructor is notified of the offering, including a description, of the dates for the offering, and of all the other instructors. The instructors also receive either an iCal attachment or a meeting request (depending on your configuration).

> **Note**
>
> - You typically define notifications at the beginning of an implementation. If, however, you need to go back and change the instructor notification, you can do it by going to *System Admin* > *Configuration* > *Notification Templates*.
> - The locale of the associated user is used for every notification sent to the instructor. This means that if there is a user associated with the instructor and the preferred locale is maintained at the user level then the instructor will receive notifications in their preferred locale. If there is no user associated with the instructor or if the associated user is inactive then the system default locale will be used.

Related Information

Notifying Instructors of Teaching Assignments [page 46]

6.1 Notifying Instructors of Teaching Assignments

Notify instructors of teaching assignments so that they can block their calendars for the assignment.

Prerequisites

Assign at least one instructor to the class time slots. Ideally, you should assign all primary and secondary instructors to the time slot before you send the notification. You can also send notifications when you first create a class by selecting *Notify Instructor* in the Add New Class window.

> **Note**
>
> When you send instructor notifications for *Virtual* classes, the system sends only an email notification to the assigned instructors. For classes that are not *Virtual*, instructors receive two emails: one notification and another with a VCAL/ICS attachment.

Context

Unless instructors are watching their instructor dashboards (*My Classes*), they won't see that they have upcoming training assignments. You send notifications to tell instructors about new teaching assignments.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Search for and open the class that the instructor is teaching.
3. Go to the *Agenda* tab.
4. For each time slot, verify that you have assigned a primary and (optionally) secondary instructors.
5. In the *Actions* menu, choose *Notify Instructors*.
6. In *Notify Instructors*, select the instructors who should receive the notification and then choose *Send Notification*.

Results

Each instructor (primary and secondary) receive an email notification (and a calendar invite or a calendar attachment if the class is not *Virtual*) with class details, a personalized meeting link, allowing them to join the session independently. The exact details they receive varies depending on your configuration. You configure the information in the `InstructorAssignmentNotification` notification template (*System Administration* > *Manage Email* > *Email Notification Templates*).

7 Instructor Data: Delete and Purge

When instructors leave your organization, you can meet data privacy rules for your organization and jurisdiction.

Although we do not store sensitive data about instructors, we do store personal information like name and address. And one person can have an instructor profile, a related learner profile, and a learning administrator profile. We offer tools to help you implement your data privacy practice and remove instructor data (and related profiles) when people leave your organization.

Setting Up Personal Data Retention for SAP SuccessFactors Learning [page 49]
Set up data retention for SAP SuccessFactors Learning after you set up data retention in SAP SuccessFactors to handle situations that are unique to Learning.

Purging Inactive Users [page 50]
This section describes how to purge inactive users from Employee Central.

Excluding People from the Learning Audit History Purge [page 51]
Exclude people from the Learning audit history purge if you want to make an exception and keep their audit history past the set retention time.

Stages of User Data Removal in SAP SuccessFactors Learning [page 53]
SAP SuccessFactors Learning has a process for irrevocably deleting user data. It begins with inactivation, requires deletion, and finishes by purging user data from the audit history tables.

SAP SuccessFactors Learning Native-only Purge Exceptions to Data Retention Management [page 54]
A few SAP SuccessFactors Learning customers cannot take advantage of Data Retention Management (DRM) because they do **not** use SAP SuccessFactors platform.

Deleting SAP SuccessFactors Learning Users without Data Retention Management [page 56]
Configure a process to delete SAP SuccessFactors Learning users who are outside the DRM system to set up your data privacy system.

Data Privacy Auditing for Learning Native Only Customers [page 58]
Although most customers should audit personal data from central SAP SuccessFactors privacy tools, we make data privacy reports available inside Learning for customers who are native-only (have not adopted the SAP SuccessFactors platform).

Auditing Changes Made by a Learning Administrator in SAP SuccessFactors Learning [page 59]
Audit the changes made by a learning administrator to your users' personal data as part of your data privacy practice.

Auditing User Information Stored in SAP SuccessFactors Learning for Native Users [page 60]
If you have native users, you can run the personal information report from SAP SuccessFactors Learning.

7.1 Setting Up Personal Data Retention for SAP SuccessFactors Learning

Set up data retention for SAP SuccessFactors Learning after you set up data retention in SAP SuccessFactors to handle situations that are unique to Learning.

Prerequisites

Most customers must set up Data Retention Management (DRM) before setting up the specific features of Learning personal data retention. A few customers do not have DRM because they do not use SAP SuccessFactors platform. Those customers do not set up DRM first.

Procedure

1. If you are **not** integrated with SAP SuccessFactors platform, go to SAP SuccessFactors Learning Administration and then go to *System Admin* > *Automatic Processes* > *Native User Deletion*.
2. Configure *Native User Deletion* to delete your users.

   Most customers are integrated with SAP SuccessFactors platform. If you are using SAP SuccessFactors platform, then your users are deleted by the Data Retention Management (DRM) tool. If you use DRM, do **not** configure *Native User Deletion*.
3. Go to SAP SuccessFactors Learning Administration, and then go to *System Admin* > *Automatic Processes* > *Purge Deleted User Audit History*.
4. Configure *Purge Deleted User Audit History* to purge users' audit history after they are deleted.

Task overview: Instructor Data: Delete and Purge [page 48]

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Purging Inactive Users [page 50]
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7.2 Purging Inactive Users

This section describes how to purge inactive users from Employee Central.

Context

To purge inactive users:

Procedure

1. Go to *Admin Center*.
2. In the Tools Search field, type *Data Management*.
3. On the *Data Management* page, click the *Create New Purge Rule* button.
4. Select the action *Purge Inactive User*. This option ensures that the purge run deletes the user and all related records in all modules completely and irrevocably from the database.
5. Under *Add purge user criteria*, there are two sections:
   - *Set purge inactive user rules*: Here you define which user or users you want to delete completely from the system.
   - *Exclude users that meet the following criteria*: You have to uncheck the checkbox *There is data for this user in Employee Central (EC)*.
     This option is checked by default to prevent users from being deleted as long as employee data is stored for them. For non-Employee Central users, this checkbox is irrelevant because the data will always be deleted.
6. Under *Select person who will review and approve the request*, enter the approver or approvers that have to approve the purge request.
7. Now you have two options:
   - To schedule a job that executes your changes at a specific point in time, click *Schedule...*
   - To run the purge job immediately, click *Launch Now...*

   The approver has to approve this purge request before the system executes it.

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7.3 Excluding People from the Learning Audit History Purge

Exclude people from the Learning audit history purge if you want to make an exception and keep their audit history past the set retention time.

Prerequisites

Before you can exclude people or their data from purge in SAP SuccessFactors Learning, you must first find all IDs that the person uses. In Learning, one person can have one ID as a learner, a different ID as an instructor, and yet a third ID as an administrator. This supports a more flexible implementation, but it means that you must find all IDs to preserve one person's data. Go to these places to find and record the person's IDs:

- Go to *People* > *Users* to find the person's ID as a learner.
- Go to *People* > *Instructors* to find the person's ID as an instructor.
- Go to *System Administration* > *Security* > *Administrators*.

> **Note**
>
> Not all people have all three kinds of IDs.

Context

The *Purge Deleted User Audit History* process usually purges users' Learning audit history after they've been deleted for a set amount of time. You can, however, exempt some users' data from the purge. Check your organizations' data privacy policies for reasons why you should exclude users. For example, you might have legal proceedings or a hold on the information.

> **Note**
>
> In this context, the words audit and audit history mean **audit for compliance**. It's the data that shows to compliance auditors, for example, who approved enrollment and on what date.

> **Note**
>
> You can exclude users from *Purge Deleted User Audit History* only if they're already deleted from the transactional tables.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Purge Deleted User Audit History*.
2. Check that the process is enabled and look at *Purge deleted users' audit data after the specified number of days* to see when you should expect users to be deleted if they're absent from the exclusion list.
3. Click *Edit Exclusion List*.
4. In the exclusion list, add each type of ID for the person:
   a. Select *User* and then add the ID that you found in *People* > *Users*, type the ID in *Record ID*, and then click *Add*.
   b. Select *Primary Instructor* and then add the ID that you found in *People* > *Instructors*, type the ID in *Record ID*, and then click *Add*.
   c. Select *Admin* and then add the ID that you found in *System Administration* > *Security* > *Administratorsi*, type the ID in *Record ID*, and then click *Add*.

Next Steps

If you add a person to the exclusion list for the audit table purge, then you probably also want to add the user to the exclusion list for the *Native User Data Retention* process.

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7.4 Stages of User Data Removal in SAP SuccessFactors Learning

SAP SuccessFactors Learning has a process for irrevocably deleting user data. It begins with inactivation, requires deletion, and finishes by purging user data from the audit history tables.

SAP SuccessFactors Learning follows a deliberate process for irrevocably deleting user data. At the end of it, user data is removed from the system and can't be recovered. You follow this process as part of your data privacy practice.

Transactional

The transactional stage of user data is the precursor to any data removal. In this stage, users are active employees or, in the case of external users, active users. We maintain their personal data in the transactional tables. During this stage, you can set up a partial purge to remove **old** data like learning history and assignments, or personal information logged in the audit tables, but the current personal history of the users remains in Learning.

Inactivation or Termination

Inactivation or termination is the first stage in data removal. Before this stage, users are in the transactional stage, but when they're inactivated or terminated, we begin the process of purging their data completely.

- You can inactivate internal or external users directly in SAP SuccessFactors Learning Administration in the user record or you can inactivate users through a connector. You can still search for inactive users and their data is still in the transactional tables. You can easily activate them again at any time.
- You can terminate Learning native-only users in the user record or through a user connector.

> ⓘ Note
>
> When a record is inactive, most of the system does not include that record in searches or reports. Some searches and reports allow administrators to include inactive records. Deactivating (instead of deleting it) hides it from view but keeps it for historical record. Because you cannot restore a deleted record, we recommend that you delete a record when you make a mistake (for example, if the record ID is simply incorrect) or as part of your data privacy practice.

Deletion

Deletion is the second stage of data removal. When users are deleted, the users' data is removed from the transactional tables (PA tables), but the data is preserved in the audit history tables (PH tables). At this stage, learning administrators can't look up the user data but the users can appear on audit reports. You should delete users only when you intend to remove them completely from the system because the next stage, the purge process, looks for deleted users and removes their data irrevocably.

Deletion can happen in many different ways. Users who are deleted from the SAP SuccessFactors central user management system through standard Data Retention Management (DRM) are marked deleted in Learning. Administrators can delete users directly from the administration environment. And an automatic process can delete **native** users who have been inactive for a set period of time.

Purge

Purged users are irrevocably removed from the system. Their data is removed from both transactional tables and audit history tables. Users are purged through an automatic process that looks for deleted users and removes the last of their saved data from the audit history tables. After the purge process runs, the user data is no longer in the SAP SuccessFactors Learning database.

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7.5 SAP SuccessFactors Learning Native-only Purge Exceptions to Data Retention Management

A few SAP SuccessFactors Learning customers cannot take advantage of Data Retention Management (DRM) because they do **not** use SAP SuccessFactors platform.

Native Users are Exempted from DRM

Data Retention Management (DRM) runs in the SAP SuccessFactors platform. Most Learning customers use platform, but a few customers do not. If you do not have the platform, then DRM does not run for you, so you need a separate process to trigger the deletion of **native** user records. A native user is one that exists only in SAP SuccessFactors, not in platform.

Native users can enter Learning in many ways: Directly from a connector from an HRIS system, self-registration, or Learning Sites. Regardless of how they enter Learning, they if they are present only in Learning then they are not a part of the platform data retention management system.

Because SAP SuccessFactors values data privacy, we accommodate the data privacy policies of customers who have not yet adopted platform. We have a process that mimics DRM for **native** users (those users for customers without platform). The Native User Deletion process looks for inactive **native** users and, based on a set of rules that you define, it deletes them from the transactional tables. The next stage, the purge process, then picks up the deleted users as if they were deleted by DRM.

If you **are** using the platform, then we recommend that you ignore the Native User Deletion process.

Native Users are Exempted from DRTM

Data Retention Time Management (DRTM) runs in the SAP SuccessFactors platform. Most Learning customers use platform, but a few customers do not. If you do not have the platform, then DRTM does not run for you, so you need a separate process to trigger the deletion of **native** user records. A native user is one that exists only in SAP SuccessFactors, not in platform.

Because SAP SuccessFactors values data privacy, we accommodate the data privacy policies of customers who have not yet adopted platform. We have a process that mimics DRTM for **native** users (those users for customers without platform). The Native User Data Retention process looks for inactive **native** users and, based on a set of rules that you define, it deletes them from the transactional tables. The next stage, the purge process, then picks up the deleted users as if they were deleted by DRTM.

If you **are** using the platform, then we recommend that you ignore the Native User Data Retention process.

Audit Tables are not Handled by DRM

SAP SuccessFactors Learning has special audit tables that keep the actions that users, instructors, and administrators perform in their learning tasks. The tables keep an audit trail of users' learning, instructors' teaching, and administrators' work with the system. The DRM process does not affect the audit tables.

Instead, audit tables are purged by the *Purge Deleted User Audit History* Learning automatic process. It looks for deleted users and then purges their audit history. You can exclude personal information from the audit history purge.

Single Retention Time for All Countries or Regions Configured

Unlike Data Retention Time Management (DRTM), which is used by platform customers, native-only customers must select a single retention time and apply it to all countries that they configure.

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7.6 Deleting SAP SuccessFactors Learning Users without Data Retention Management

Configure a process to delete SAP SuccessFactors Learning users who are outside the DRM system to set up your data privacy system.

Prerequisites

We recommend that you define a standard process for inactivating users. Most customers set up a user connector that inactivates users, but the reasons for inactivation are unique to the organization. This deletion process begins when user accounts are inactivated.

Context

In most cases, your users are deleted and purged from SAP SuccessFactors Learning transactional tables as part of the Data Retention Management (DRM) tool through Data Retention Time Management (DRTM) processes. Standard data retention runs centrally on SAP SuccessFactors Platform. If you are **not** integrated with SAP SuccessFactors Platform, then you must run a set of Learning automatic processes to delete and purge users and user data. NativeUserDelete is the template that is sent by the DRM tool.

> ⚠ Caution
>
> **Be careful with this process if you have user records that populate from SAP SuccessFactors platform**. These users are already managed from within the platform and this process can potentially delete these users. User deletion is permanent, and the records cannot be restored.

> ⓘ Note
>
> This process creates a full delete of learners' data in transaction tables as if DRM ran. DRM is often called **full purge**. This process does **not** replace Data Retention Time Management (DRTM) from platform. DTRM is also

called **partial purge**. If you do **not** have SAP SuccessFactors platform and you want to mimic DTRM, please configure *System Administration* > *Automatic Processes* > *Native User Data Retention*.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Native User Deletion*.
2. Schedule the automatic process using the fields in the *Schedule* area.

   → Tip

   Schedule the process to run before the *Purge Deleted User Audit History* process so that the purge process has the most recent set of deleted users.
3. In *Delete Criteria*, select the records that you want to delete.

This Field...	...Deletes these records
Users	You must delete user records as part of this process. User records are in *People* > *Users*.
Related Instructors	You must delete related instructors as part of this process. If a user record is attached to an instructor account, then the instructor account is also deleted. You match instructor accounts to user accounts in the instructor account in *Summary*. You almost always want to delete instructors when you delete their associated instructor records because you want to manage the data privacy of a person, not an account. If, however, you do **not** want to delete instructor records when you delete the user account, then remove the association as part of your inactivation process.
Related Admins	If you select *Related Admins*, and a user record is attached to an administrator account, then the administrator account is also deleted. You match administrator accounts to user accounts in the administrator account in *Summary*.
Instructors	If you select *Instructors*, then the job looks not only for inactive user accounts but also inactive instructor accounts.

4. To delete external users and instructors, select *Delete external users and instructors that have been inactive for the specified number of days*, and then type a grace period between the external users and instructors inactivation and deletion.

   For example, if you type **90**, then to be eligible for deletion, the accounts must be continuously inactive for 90 days. If you activate them again within 90 days, they won't be deleted.
5. To delete internal users, select *Delete internal users that have been terminated for the specified number of days*, and then type a number of days for a grace period between termination and deletion.

   Internal users are deleted when:

   - They have a termination date and their termination date is before the threshold (for example, if you set 30 days, the user is terminated 31 days ago or more). Termination date is set on the user record in *Terminated*.
   - They have a shopping account type of *Internal*. The shopping account type is set in the user record in *Commerce*.
6. Click *Apply Changes*.

Next Steps

After you set up the delete process, we recommend that you set up the purge process by going to *System Administration* > *Automatic Processes* > *Purge Deleted User Audit History*.

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7.7 Data Privacy Auditing for Learning Native Only Customers

Although most customers should audit personal data from central SAP SuccessFactors privacy tools, we make data privacy reports available inside Learning for customers who are native-only (have not adopted the SAP SuccessFactors platform).

You run data privacy reports in SAP SuccessFactors Learning if you have not adopted SAP SuccessFactors platform or cannot use it. Otherwise, we recommend that you run data privacy reports from the central system so that you can see all users and get all changes, not just changes from Learning.

> ⚠ Caution
>
> When you audit personal information from Learning, you see learning data only.

For native-only customers, we offer these personal data audit reports:

- The *User Personal Information* report shows you a snapshot of the current personal information stored in SAP SuccessFactors Learning. It does **not** show changes over time.
- The *User Personal Information Change* report shows changes to users' data over time. You run it from one of two views:
  - You can run it to audit one administrator and see all the changes made **by** the administrator to all users' personal data.
  - You can run it to view an instructor, a learner (user), or administrator and all the changes made **to** the instructor, learner, or administrator.

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7.8 Auditing Changes Made by a Learning Administrator in SAP SuccessFactors Learning

Audit the changes made by a learning administrator to your users' personal data as part of your data privacy practice.

Context

As part of your data privacy practice, you can audit changes made to personal data by learning administrators. We recommend that you run the audit report in the central SAP SuccessFactors data privacy tools so that you can audit Learning **and also** other parts of the suite (performance, goals, baseline employee data, and so on). When you run the audit report Learning, you see the Learning data only.

> **Note**
>
> You run *User Personal Information Changes* on one user at a time. You can't schedule it as a recurring job or customize it.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go *Reports*.
2. Find and open *User Personal Information*.

> **Note**
>
> We also offer a report called *User Personal Information* in the same group. It is for reporting the current snapshot of a user's personal information.

3. To hide user IDs from the results of the report, select *Mask User IDs*.
4. In *Admin ID*, select the admin that you want to report for.

   When you run a report to see the personal changes made by administrators, the user and instructor IDs are irrelevant.
5. In *Additional Data*, select the type of data that you want to see in the report.
6. Set a date range for the report and then choose *Schedule Job*.

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7.9 Auditing User Information Stored in SAP SuccessFactors Learning for Native Users

If you have native users, you can run the personal information report from SAP SuccessFactors Learning.

Context

We recommend that you run the information report in SAP SuccessFactors platform. Some customers, however, must run the report in Learning because they have native-only users: users who do not have a record in platform. When you run the report from within Learning, you see the Learning information only.

> **Note**
>
> You run *User Personal Information* on one user at a time. You cannot schedule it as a recurring job or customize it.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go *Reports*.
2. Find and open *User Personal Information*.

   > **Note**
   >
   > We also offer a report called *User Personal Information Change* in the same group. It is for reporting changes over time to personal information; not the current information alone.

3. To hide user IDs from the results of the report, select *Mask User IDs*.
4. Locate the field that corresponds to the type of user whose personal information you want to report.
   - If you want to report the personal information of a learner, select the user's ID in *User*.
   - If you want to report the personal information of an administrator, select the administrator's ID in *Admin ID*.
   - If you want to report the personal information of an instructor, select the instructor's ID in *Instructor*.
5. In *Additional Data*, select the type of data that you want to see in the report.

This Choice	Retrieves this data
Personal Information	Personal information includes phone numbers, email addresses and so on. If you are using finance features, you also see financial information.
Learning Assignments	Learning assignments include the courses a learner is assigned.
Learning History	Learning history includes the courses that a learner has completed.

6. Click *Schedule Job*.

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Related Information

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