

SAP SuccessFactors

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Managing SAP SuccessFactors Learning for Administrators

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Content

1 Learning Administration. 22

2 The Building Blocks of a Learning Management System. 23

3 General Display Name. 26

3.1 General Display Name Implementation in Learning. 26

3.2 Validating SF User Connector Configuration. 28

3.3 Validating User Connector Configuration. 29

3.4 Synchronizing Configurations from BizX into LMS. 29

3.5 General Display Name Implementation for Learning Notifications. 30

4 Adding Courses, Programs and Curricula. 32

5 Courses: Fundamental Building Blocks of Learning. 34

5.1 Adding Items. 34

5.2 Creating Instructor-Led Courses. 35

Dividing a Learning Item into Agendas. 37

Creating Equal and Sequential Agendas of a Learning Item. 38

Specifying the Type of Equipment That Must Be Present for Courses. 39

Adding Materials to Learning Items. 40

Learning Item Agendas. 41

Where Your Set of SAP SuccessFactors Learning Courses Can Originate. 42

Authorizing Many Instructors to Teach One Learning Item. 43

5.3 About Online Content. 44

5.4 Creating Online Courses. 45

Settings That Control Online Content in a Learning Item. 47

Adding Content Packages to a Learning Items. 52

Adding Online Content Objects to Learning Items. 53

Adding Assessments to Learning Items. 54

Organizing Online Learning Content for a Learning Item. 55

Creating an Adaptive Online Course 57

Reassigning Online Learning Items after Modifying Them. 58

Removing Online Course Content. 59

Locking or Removing Failed Online Courses. 60

Setting AICC Max Normal In a Course. 61

Tips for Configuring Online Exam Contents for Adaptive Learning. 62

Add SCORM Content as a Single Package. 63

OCN Content as Learning Item Content. 63

Adding Online Content to Courses. . . . 63
5.5 Adaptive Online Course Types. . . . 64
5.6 Creating Other Items. . . . 65
Enabling a Task Checklist. . . . 66
Setting the Order of Tasks in a Course. . . . 67
Enabling Administrators to Assign Task List Observers. . . . 67
Enabling Users to Nominate Task Checklist Observers. . . . 68
Task Checklist Settings. . . . 69
Task Checklist Business Process. . . . 70
SAP SuccessFactors Learning Task Checklists. . . . 71
Task Checklist Observer. . . . 72
Rules for Modifying Assigned Task Checklists. . . . 72
The Process of Selecting Observers and Completing Observations. . . . 73
5.7 Creating Instructor-Led with Online Content Courses. . . . 74
5.8 Adding Attributes to Items Manually. . . . 76
5.9 Premium AI Features in SAP SuccessFactors Learning. . . . 77
AI-Assisted Course Generation in Learning. . . . 77
AI-Assisted Image Generation in Learning. . . . 80
AI-Assisted Writing in Learning. . . . 82
Enabling AI-Assisted Skills and Skill Ratings for Learning. . . . 85
Creating Skills Inference Requests for Items and Programs. . . . 86
Reviewing and Associating Inferred Skills and Ratings for Items and Programs. . . . 88
Enabling Automatic Review and Association of AI-Inferred Skills and Ratings to Learning. . . . 91
5.10 Why add Competencies, Objectives, and Tasks to Courses. . . . 94
Adding Objectives to Courses. . . . 95
Adding Tasks to Courses. . . . 96
Inherited Learning Item Objectives. . . . 97
5.11 Copying an Existing Course to Create a New Course. . . . 97
5.12 Assigning Courses to Learners. . . . 98
5.13 Preventing Learners from Over-Enrolling. . . . 99
5.14 Enabling Class Requests for Courses. . . . 100
5.15 Recommending Courses to Pools of Learners. . . . 101
5.16 Adding Surveys to Evaluate Courses or Learners. . . . 102
Copying a Survey as a Template for New Surveys. . . . 103
Assigning Surveys to Courses in Bulk. . . . 104
Reviewing Survey Statistics. . . . 105
Modifying Survey Notifications. . . . 105
Building a Survey Direct Link. . . . 106
Configuring Course Satisfaction Surveys. . . . 106
Configuring Course Follow-Up Surveys. . . . 107
Adding Survey Questions and Instructions. . . . 109

Adding Learning Rating Scales. . . . 111
Assigning Satisfaction Surveys After Learning Item Completion. . . . 112
Adding Follow-Up Surveys to Learning Items. . . . 113
Translation Support for Learning Surveys. . . . 114
Breaking the Link Between a Notification and Its Corresponding Template ID. . . . 115
Learning Competency Scales Compared to Platform Competency Scales. . . . 115
Learning Rating Scales. . . . 115
Learning Evaluation Types. . . . 116
5.17 Adding Learning Items to Libraries from the Learning Item Workspace. . . . 117
Checking the Libraries that a Learning Item Belongs To. . . . 118
Changing the Price of a Single Learning Item in its Libraries. . . . 118
Adding Categories to Learning Activities. . . . 119
5.18 Revising a Learning Item. . . . 120
Learning Item Revision. . . . 122
5.19 Adding Prerequisites to Learning Items. . . . 124
Learning Item Prerequisites. . . . 124
Prerequisite Groups. . . . 125
Results of Failing to Meet Learning Item Prerequisites. . . . 125
Substitute Relationships with Prerequisites. . . . 125
5.20 Importing Open Content Network Items Manually. . . . 126
Open Content Network. . . . 126
Open Content Network Usage Notes. . . . 127
Configuring Open Content Network Single Sign On. . . . 128
5.21 Tips for Managing your Course Workspace. . . . 129
Deactivating a Learning Item. . . . 129
Deleting a Learning Item. . . . 130
5.22 Common Troubleshooting in Courses. . . . 131
Viewing Open Content Network Sessions. . . . 131
Viewing the Schedules and Enrollment of a Learning Item. . . . 132
Checking the Curricula that Use a Learning Item. . . . 132
Checking the Assignment Profiles that Assign a Learning Item. . . . 133
5.23 Less Common Course Configuration. . . . 134
Enabling Detailed Content Object Audit on Learning Items. . . . 134
Setting a Price for a Learning Item. . . . 135
Configuring Purchasing Options for Learning Items. . . . 136
Making an Exception to the Cost Calculation of a Learning Item. . . . 138
Making an Exception to How a Learning Item Is Graded. . . . 139
Configuring a Learning Item for Government Reporting. . . . 140
Adding SAP Jam Groups to a Learning Item. . . . 141
Exporting AICC Content. . . . 143
Assigning Learning Items Directly to Users. . . . 143

Creating Learning Item Overview Pages. . . . 144
Setting the Default Reassignment of Learning Items. . . . 145
Adding Pre-Tests and Post-Tests to a Learning Item. . . . 146
Adding Documents to Learning Items. . . . 147
5.24 Learning Item Details Fields. . . . 148
5.25 Learning Item Classifications. . . . 180

6 Scheduling Courses into Class Times and Locations. . . . 182
6.1 Class Requests. . . . 183
Viewing Learner Class Requests. . . . 183
Viewing Class Requests by Course. . . . 184
How Class Requests are Made and Resolved. . . . 185
Class Requests Fields. . . . 186
6.2 Adding Recurring Classes. . . . 187
6.3 Using an Existing Class as a Template for a New Class. . . . 190
6.4 Adding Classes. . . . 192
Adding and Editing Class Time Slots. . . . 195
Adding a Virtual Time Slot. . . . 196
Configuring VLS Time Slots to Add Learning History Records. . . . 197
Copying Time Slots. . . . 198
Copying Class Segment Resources. . . . 199
Adding Contacts to Classes. . . . 200
Adding Materials to Classes. . . . 200
Adding Document Links to Classes. . . . 201
Class Time Slots. . . . 202
Finding the Courses Scheduled into a SAP SuccessFactors Learning Location. . . . 202
Finding a SAP SuccessFactors Learning Facility Manager. . . . 203
6.5 Tips for Managing Classes and the Class Workspace. . . . 204
Creating Class Groups. . . . 204
Deleting a Class. . . . 205
Removing Classes from Libraries. . . . 205
Creating Schedule Blocks. . . . 206
6.6 Managing Costs of Classes. . . . 207
Changing a Class's Price in a Library. . . . 207
Class Government Reporting. . . . 208
Changing a Class Cost Calculation. . . . 208
Adding Class Costs. . . . 210
Changing Class Prices. . . . 211
Changing the Cancellation Policy of a Class. . . . 212
Changing Class Chargeback Methods. . . . 213
6.7 Class Details Fields. . . . 214
6.8 Classes. . . . 220

7 Registering Learners for Classes. 221
7.1 Viewing the Learners in a Class. 221
7.2 Adding Learners to Class Registration Lists. 222
7.3 Reserving Seats in a Class for Specific Users. 223
7.4 Enrollment Status Meanings. 224
7.5 Adjusting Payment Methods of Users in Classes. 224
7.6 Adjusting Price of a Class to Users. 225
7.7 Investigating Order Information for Users in Classes. 226
7.8 Getting a Class Roster. 226
7.9 Resending Class Registration Email Notifications. 227
7.10 Recording Learning from the Class View. 228
7.11 Initiating Evaluations Manually. 228
7.12 Adding Special Requests to a Class. 229
7.13 Adding Instructional Text to the Class Registration Page. 230

8 Concluding Classes. 231
8.1 Recording Attendance for a Class Time Slot. 232
8.2 Splitting Costs for Training. 232
8.3 Editing Closed Classes. 234
8.4 Add Learning History with Finance. 239
Setting Completion Status for Internal Learning Events with Financial Transactions. 239
Setting Completion Status for External Learning Events with Financial Transactions. 242
8.5 Add Learning History for Multiple Courses. 245
Setting Completion Status for Internal Learning Events Without Financial Transactions. 245
Setting Completion Status for External Learning Events Without Financial Transactions. 247
8.6 Closing Classes. 249
8.7 Enabling the Bulk Learning Editor. 250
8.8 Learning Completion. 250
8.9 Results of Learning Completion. 251
8.10 Posting Learning Events to the LMS with a Web Service. 251
8.11 Learning History. 252
8.12 Triggers for Learning Completion Event. 253
8.13 Cancel Class. 253
Canceling a Class. 254
Balancing Costs when you Cancel the Class. 255
Managing Class Rosters when you Cancel a Class. 256

9 Learning Programs: Bundled Courses in a Syllabus. 258
9.1 Adding Learning Programs. 259
9.2 Adding Attributes to Programs. 261
9.3 Creating Agendas for Learning Programs. 263
9.4 Adding Items to Learning Program Agenda. 264

9.5 Learning Programs Basic Settings. . . . 266
9.6 Viewing the Assignment Profiles that Assign a Program. . . . 269
9.7 Translating Learning Program Titles and Descriptions. . . . 270
9.8 Associating Learning Programs with SAP Jam Groups. . . . 271
9.9 Adding Learning Program to Libraries. . . . 272

10 Curricula: Bundled Courses in Qualification Tracks. . . . 273
10.1 Qualification Strategies in SAP SuccessFactors Learning. . . . 273
How to Choose Between Curricula and Programs. . . . 275
Advantages of Programs. . . . 275
Advantages of Curricula. . . . 276
Curricula and Programs Feature Comparison. . . . 277
10.2 Adding Curricula. . . . 278
Curriculum Details Fields. . . . 279
Adding Content to Curricula. . . . 281
Adding Document Links to Curricula. . . . 313
Adding Curricula to Libraries from the Curricula Workspace. . . . 314
Creating Curriculum Overview Pages. . . . 316
10.3 Creating a Substitute Course Relationship. . . . 317
Curriculum Force Substitute Incomplete Example. . . . 318
Forcing Substitutes to Act as Primary Learning Items in Curricula. . . . 319
SAP SuccessFactors Learning Course Substitution. . . . 320
Substitute Relationship Mapping Fields. . . . 321
Learning Substitute Assignment. . . . 322
Viewing the Substitutes for a Learning Item. . . . 322
10.4 Removing a Substitute Course Relationship. . . . 322
10.5 Curriculum Assignment and Management. . . . 323
Assigning Curricula Directly to Users. . . . 323
Assigning Curricula to Learners. . . . 327
Communicating with Learners in a Curriculum. . . . 328
Assigning Curricula Through Learning Job Codes. . . . 328
Copying a Curriculum. . . . 336
Checking the Assignment Profiles That Assign a Curriculum. . . . 336
Viewing the Job Codes in Curricula. . . . 337
Removing Assignments from the Contents of Curricula. . . . 338
Troubleshooting Individual User Status in Curricula. . . . 338
Diagnosing Incorrect Curriculum Assignments. . . . 343
Curriculum Assignment Strategies. . . . 348
Reassignments from SAP SuccessFactors Learning Curricula Treated as Single Assignment. . . . 349
10.6 When and How to Decommission Curricula. . . . 349
Deleting a Curriculum. . . . 350
Deactivating a Curriculum. . . . 350

11 Libraries: Sets of Courses that Learners can Discover. 352
11.1 Creating Libraries. 352
Library Summary Fields. 354
Adding Learning Items to a Library. 355
Adding Curricula to a Library. 356
Adding Programs to a Library. 357
Managing the QuickGuides in a Library. 358
QuickGuides. 358
Enabling QuickGuides for Users. 359
Enabling a Library to Receive Collections. 360
Managing the Collections in a Library. 361
Placing Courses into Featured, New, and Revised Card Categories. 362
Setting the Relevance of Libraries' Search Results. 363
Setting the Search Tier of Libraries' Search Results. 364
Changing the Price of a Learning Item in a Library. 365
Best Practices for Curating Learner Published Content. 366
Library Options. 367
11.2 Assigning Libraries to Learners. 370
11.3 When and How to Decommission Libraries. 371
Inactivating a Library. 372
Deleting a Library. 373
11.4 Enabling Item Recommendations Property. 374
How SAP SuccessFactors Learning Finds Recommendations for the Recommended for You Library Category. 374
Learning Recommendations Tile and Recommended for You Library Category. 374
11.5 Library Troubleshooting Strategies. 375
Viewing a Library's Assignment Profiles. 375
Creating Library Directed Search Direct Links. 376

12 Assignment Profile Process for Bulk Assignment. 377
12.1 Creating an Assignment Profile. 377
Basic Assignment Profile Configuration. 378
Setting Up Assignment Profile Rules. 380
Executing Changes for Assignment Profile Rules. 382
Manually Updating Assignment Profiles. 383
Checking an Assignment Profile Pool. 384
Assignment Profile Propagation Status. 385
User Attributes Available to Assignment Profiles. 385
12.2 Assigning Libraries to Learners. 388
12.3 Assigning Courses to Learners. 390
12.4 Assigning Curricula to Learners. 391
12.5 Recommending Courses to Pools of Learners. 392

12.6 Scheduling Assignment Profiles to Update Automatically. . . . 393
Assignment Profile Synchronization Processing. . . . 394
How the Assignment Profile Synchronization Automatic Process Handles Plans and Goals. . . . 395
12.7 Deactivating an Assignment Profile. . . . 396
Deactivating Assignment Profiles While Preserving Learning Assignments. . . . 397
Deactivating Assignment Profiles and Removing its Learning Assignments. . . . 398
12.8 Copying an Assignment Profile. . . . 399
12.9 Deleting an Assignment Profile. . . . 399
12.10 Checking the Assignment Profiles that Apply to a Learner. . . . 400
12.11 Status Values for Adding Objects to SAP SuccessFactors Learning Assignment Profiles. . . . 401
12.12 SAP SuccessFactors Learning Assignment Profiles. . . . 401
12.13 Assignment Profile Pools. . . . 402
12.14 Learning Assignment Methods that do not Rely on Assignment Profiles. . . . 402
12.15 Adding Learning Employee Types. . . . 404
12.16 Why Avoid Learning Regular or Temporary Employee Metadata. . . . 404

13 Learning Collections: Lists of Hyperlinks. . . . 406
13.1 Collections. . . . 407
13.2 Creating a Learning Collection as an Administrator. . . . 409
13.3 Enabling Learners to Create Collections. . . . 410
13.4 Enabling Administrators to Create Collections. . . . 411
13.5 Reporting on Learning Collection Views. . . . 413
13.6 Looking up Learning Collection Views. . . . 414
13.7 Enabling External Links. . . . 415
13.8 Adding an External Link. . . . 416
13.9 Pushing External Learning Links to Users. . . . 417
13.10 Tracking the Views of Recommended External Links. . . . 418
13.11 SAP SuccessFactors Learning External Links. . . . 419
13.12 An Example of Using Collections. . . . 420

14 Learning Needs Management Tools. . . . 423
14.1 Registration Assistant. . . . 423
Withdrawing Users from a Class with Registration Assistant. . . . 423
Reserving Seats in a Class with Registration Assistant. . . . 424
Registering Users in a Class with Registration Assistant. . . . 426
14.2 Edit Required Dates. . . . 429
14.3 External Links. . . . 429
14.4 Activating and Deactivating Open Content Network Learning Items. . . . 430

15 Adding Tasks, Objectives, Requirements, Competencies. . . . 432
15.1 Adding Learning Objectives. . . . 433
Learning Objective Summary Fields. . . . 434

Using an Existing Learning Objective as a Template for new Objectives. 435
Viewing the Content Objects That Address a Learning Objective. 435
Storing Custom Data in a Learning Objective. 436
Adding Attributes to Objectives. 437
Viewing the Learning Items that Use a Learning Objective. 438
Viewing the Objective as it is Displayed at Run Time. 439
Viewing the Questions that Test an Objective. 439
Learning Objectives. 439
Exam Usage Tab. 440
Exam Usage (Legacy) Tab. 440
15.2 Adding Requirements. 441
Allowing Users to Fulfill a Requirement with Hours from Any Learning Item in a Curriculum. 442
Allowing Users to Fulfill a Requirement with Hours from a Subset of Learning Items in a Curriculum 444
Allowing Users to Fulfill a Requirement with Learning Items from a Subset of Learning Items in a Curriculum. 445
SAP SuccessFactors Learning Curriculum Requirement Types. 446
Learning Curriculum Requirement Summary Fields. 447
A Learning Requirement's View of Its Curricula. 448
When to Use the "Number of Hours of Specified Hour" Learning Requirement Type. 449
When to Use the "Number of Hours of Specified Hour Type from Pool of Items" Learning Requirement Type. 450
When to Use the "Number of Items from Pool of Items" Learning Requirement Type. 451
Learning Requirements. 453
Copying a Requirement. 453
15.3 Adding Learning Tasks. 454
Adding Attributes to Tasks. 455
Adding Documents to Tasks. 457
Adding Instructional System Design Analysis to Tasks. 457
Viewing the Courses That Use Tasks. 458
Adding Job Codes to Tasks. 458
Adding Job Locations to Tasks. 459
Adding Objectives to Tasks. 459
15.4 Adding Learning Documents. 460
Learning Document Links Metadata. 461
Reviewing Document Links Used by Tasks. 462
Reviewing Documents Used by Classes. 463
Reviewing Documents Used by Courses. 464
Reviewing Documents Used by Curricula. 465
Why you Might add Documents to Courses or Classes. 465
Adding Learning Document Link Types. 466

16 Competencies in Learning. 468
16.1 Tasks in Learning Competencies. 469
16.2 Don't Copy Competencies in Learning. 469
16.3 Adding Subject Areas to Competencies. 469
16.4 Learner Profile does not Track Competencies. 470
16.5 Competency Summary Fields. 470
16.6 Rating Criteria in Competencies within Learning. 473
16.7 Viewing the Competency Profiles in Competencies. 474
16.8 Viewing the Objectives in Competencies. 474
16.9 Reviewing Programs in Competencies. 474
16.10 Finding Learning Competencies by Rating Scales. 475
16.11 Adding Competencies to Learning Objectives. 476

17 Integrating SAP SuccessFactors Learning with Talent Intelligence Hub. 477
17.1 Auto-Publish Ratings From Learning Completion to Growth Portfolio. 479
17.2 Viewing Legacy Competencies Page. 479
17.3 Finding Learning Attributes. 480
Viewing Items in Attributes. 482
Viewing Tasks in Attributes. 482
Viewing Programs in Attributes. 483
Viewing Objectives in Attributes. 484
Adding Categories to Attributes. 485
Viewing Proficiency Levels in Attributes. 486
17.4 Generating Attributes Synchronization Job Report. 487

18 Revising Learning Resources and Metadata. 489
18.1 Physical Learning Resources. 489
Checking SAP SuccessFactors Learning Equipment Status and Placement. 491
Checking Training Learning Equipment Status. 493
Adding Learning Regions. 494
Adding Learning Facilities. 497
Adding Learning Locations. 513
Adding Learning Equipment Status. 516
Adding Learning Equipment Types. 518
Adding Learning Location Types. 519
Adding Learning Training Locations. 521
Adding Learning Training Equipment. 528
Adding Learning Materials. 539
Custom Training Resources. 546
18.2 Instructors. 546
Importing Instructors. 547
Adding Instructors. 548

Enabling Instructors to Post Learning for Impromptu Training. . . . 550
Assigning the Instructor Role. . . . 551
Assigning a Related User to Instructors. . . . 552
Adding Instructors to Regions. . . . 552
Configuring Instructors for VLS. . . . 553
Enabling Instructors to Change their VLS Passwords. . . . 554
Adding Custom Field Values to Instructors. . . . 555
Adding Instructor Shipping Information. . . . 556
Authorizing One Instructor to Teach Many Learning Items. . . . 556
Generating Proctor Codes For Instructors. . . . 557
Sending Proctor Codes to Instructors. . . . 559
Purging Instructor Proctor Codes. . . . 560
Deleting Instructor Proctor Codes. . . . 560
Viewing Instructor Teaching Schedules. . . . 561
Assigning Costs to an Instructor. . . . 562
Instructors and Administrators must have Related User IDs and the IDs Must Match. . . . 572
Instructor Identity and Access Fields. . . . 572
Instructor Authorization to Teach. . . . 574
Instructor's Proctor Status Fields. . . . 575
Types of Proctor Codes. . . . 576
Instructor Virtual Classrooms. . . . 577
The Benefits of Creating Instructor Records. . . . 577
18.3 Revising Learning Metadata. . . . 578
Metadata that Helps Administrators Find Information. . . . 578
Adding Course Completion Status. . . . 581
Adding Item Types. . . . 583
Adding Assignment Types. . . . 588
Creating Course Categories (Subject Areas). . . . 589
Adding Learning Date Format Patterns. . . . 591
Adding Learning Number Format Patterns. . . . 592
Adding Registration Status. . . . 594

19 Learner Profiles. . . . 595
19.1 SAP SuccessFactors Learners. . . . 595
User's Government Reporting. . . . 596
User Online Status Settings. . . . 596
Troubleshooting Learner Purchasing Power. . . . 603
Assigning an Account Code to Learners. . . . 604
Troubleshooting User Surveys. . . . 605
19.2 Management of Learner Course Needs. . . . 606
Identifying Users by Learning Needs. . . . 606
Launching the Registration Assistant from a User Record. . . . 607

Viewing Users' Completed Items. . . . 607
Viewing a User's Assigned Learning Items (Courses). . . . 610
Launching the Learning Needs Tool from a User Record. . . . 611
Adding SAP SuccessFactors Learning Alternate Job Classifications to Users. . . . 612
User's Assigned Items Settings. . . . 613
Viewing Learner Registration Process Status. . . . 613
Checking Users' Library Access. . . . 614
19.3 Using Learning to Look Up Learner Profile Information. . . . 615
Looking Up Learner Phone Numbers in Learning. . . . 615
SAP SuccessFactors Learning User Details Fields. . . . 616
Security Personas in SAP SuccessFactors Learning. . . . 624
Looking up a Learner's User Group Membership. . . . 628
Setting Users' Learning Locale Preferences. . . . 629
19.4 Basic Management of Learner Profiles. . . . 633
Why You Should Not Reset Passwords in Learning. . . . 633
Why You Should Not Copy Users in Learning. . . . 633
Manually Deleting Native Users. . . . 634
Hiding User Images in SAP SuccessFactors Learning. . . . 634
Launching a Proxy Session to Troubleshoot Users. . . . 635
Managing Alternate Managers in SAP SuccessFactors Learning Administration. . . . 636
Learning Organization Dashboards. . . . 637
19.5 Learning Organizations. . . . 637
Disabling a SAP SuccessFactors Learning Organization's Shopping Account. . . . 638
SAP SuccessFactors Learning Organization Summary. . . . 638
SAP SuccessFactors Learning Organization Account Code. . . . 639
SAP SuccessFactors Learning Organization Finance Details. . . . 640
SAP SuccessFactors Learning Organization Custom Fields. . . . 640
SAP SuccessFactors Learning Organization Owners. . . . 641
SAP SuccessFactors Learning Organization Reserved Seats. . . . 641
SAP SuccessFactors Learning Organizations Training Budgets. . . . 641
SAP SuccessFactors Learning Organization Training Managers. . . . 642
SAP SuccessFactors Learning Organization Users. . . . 642
19.6 User Groups. . . . 642
Placing Users into User Groups. . . . 643
User Groups Finance. . . . 644
19.7 Cohorts. . . . 644
Cohorts Summary Fields. . . . 645
Cohorts Custom Fields. . . . 645
Class Groups Offerings. . . . 646
Cohorts (Graduating Class) Register Rules. . . . 646
Cohort (Graduation Group) Users. . . . 646

19.8 Assigning Learners to New Managers with the Learning Manager Assistant. . . . 650
19.9 Merging Users Manually. . . . 651
19.10 Merging Users in Bulk Through Import. . . . 652
Considerations Before Bulk Merging Users Through Import. . . . 654
19.11 Downloading the Import Template for Validating and Merging Users. . . . 655
19.12 Validating User Records in Bulk. . . . 656
19.13 Rules Applied When Merging Users in Bulk and Manually. . . . 658

20 Online Learning Content Management. . . . 660
20.1 Content Objects. . . . 660
Creating Content That Users Can Confirm Reading. . . . 661
Copying a Content Object. . . . 665
SAP SuccessFactors LearningContent Object Summary Fields. . . . 665
Content Object Launch Methods. . . . 667
Content Object Launch Method Fields in SAP SuccessFactors Learning. . . . 668
Content Objects AICC Support. . . . 673
Learning Content Objects Cross Security Domain Fields. . . . 673
20.2 Content Packages. . . . 674
Learning Content Packages Summary Fields. . . . 674
Modifying SAP SuccessFactors Learning Content Package Objectives. . . . 675
SAP SuccessFactors Learning Content Packages Content Tab. . . . 676
20.3 Adding Assessments. . . . 676
Assessment Limit for Concurrent Users. . . . 677
SAP SuccessFactors Learning Quiz Assessments. . . . 677
SAP SuccessFactors Learning Exam Assessments. . . . 685
20.4 Question Library. . . . 711
Enabling the Question Library. . . . 712
Adding Questions to the Question Library. . . . 712
Adding a Variant to a Question. . . . 714
Randomizing Answers for Exams. . . . 715
Creating a Fill-in-the-Blank Question. . . . 716
Modifying Objectives in Existing Questions. . . . 717
Changing the Point Values of Existing Questions. . . . 718
Inactivating and Activating Questions. . . . 718
Previewing Questions. . . . 719
Adjusting Point Values of Questions. . . . 719
Question Type Uses and Examples. . . . 720
Question Point Values. . . . 721
Question Variant Examples. . . . 722
Question Versioning. . . . 723
The Relationship Between Questions and Objectives. . . . 723
20.5 Questions. . . . 724

Question Editor. . . . 725
Migration of Questions Between Environments When Using Legacy Questions. . . . 748
20.6 Legacy SAP SuccessFactors Learning Exams. . . . 752
Legacy Exam Behavior. . . . 753
Legacy Exam Objects' Summary Fields. . . . 757
Legacy SAP SuccessFactors Learning Exam Messages Tab. . . . 763
Legacy SAP SuccessFactors Learning Exam Questions Tab. . . . 763
Legacy SAP SuccessFactors Learning Exam Item Usage Tab. . . . 765
Legacy SAP SuccessFactors Learning Exam User Usage Tab. . . . 765
Legacy SAP SuccessFactors Learning Exam Custom Fields Tab. . . . 765
Legacy SAP SuccessFactors Learning Exam Printed Exams Tab. . . . 766
Printed Exam Templates. . . . 766
20.7 Online Learning Content Import. . . . 767
SAP SuccessFactors Learning Import Content. . . . 768
Importing Content to Add to an Existing Learning Item. . . . 770
Importing Updated Content for an Existing Learning Item. . . . 772
Importing Content to Enable it for Mobile or Offline Use in an Existing Learning Item. . . . 774
Importing New Online Course Content. . . . 775
Deleting iContent Files Using the iContent Management Tool. . . . 777
20.8 Online Content Management Configuration. . . . 780
Identifying Content Servers for Online Courses. . . . 780
Setting AICC Max Normal Default. . . . 783
Setting AICC Wrapper Confirmation Text. . . . 784
Mapping AICC Status to SAP SuccessFactors Learning Completion Status. . . . 785
Cross Domain Support Properties. . . . 788
Online Learning Content Management Configuration Properties. . . . 790
Online Learning URL Properties. . . . 791
CONTENT IMPORT System Properties File. . . . 792
OPEN CONTENT NETWORK System Property File. . . . 793

21 SAP SuccessFactors Learning Features Supported for Content Player. . . . 799

22 Learning Finance. . . . 800
22.1 Master Inventory. . . . 800
22.2 Adding Account Codes. . . . 801
The Importance of Account Code Type, Company Code, and Controlling Area. . . . 802
22.3 Order Management. . . . 802
How to Access the Order Management Tool. . . . 803
Fulfilling Orders. . . . 803
Refunding an Order. . . . 804
Approving Financial Transactions. . . . 805
Canceling a Learning Order by Order ID or Purchase Order ID. . . . 806

Creating a Purchase Refund. . . . 806
When Financial Transactions are Created. . . . 807
How Domain Restriction Works for Financial Transactions. . . . 808
How Orders and Transactions Fit Together. . . . 809
Order Management System. . . . 809
The Purchasing Process for Orders of Learning Courses. . . . 810
SAP SuccessFactors Learning Orders. . . . 812
Why Avoid Adding Learning Order Statuses. . . . 812
Order Management Summary Fields. . . . 812
Order Management Finance Contact Fields. . . . 814
Order Management Financial Transactions Fields. . . . 815
22.4 Vouchers Overview. . . . 815
22.5 Unused Vouchers. . . . 817
22.6 SAP SuccessFactors Learning Coupons. . . . 817
Adding Learning Coupons. . . . 817
Changing Coupon Display Settings. . . . 819
Checking Coupon Usage. . . . 820
Applying Coupons to Courses. . . . 821
Checking the Assignment Profiles that Assign a Coupon. . . . 821
Assigning SAP SuccessFactors Learning Coupons to Users. . . . 822
Coupon Details Fields. . . . 822
22.7 Free-of-Charge Subscriptions. . . . 825
22.8 SAP SuccessFactors Learning Purchase Orders. . . . 826
Adding a Prepaid Account. . . . 826
Copying a Prepaid Account. . . . 827
Deleting a SAP SuccessFactors Learning Prepaid Account. . . . 827
Giving Organizations Access to a SAP SuccessFactors Learning Prepaid Account. . . . 828
Giving Users Access to a SAP SuccessFactors Learning Prepaid Account. . . . 828
22.9 Library Price Change. . . . 829
Library Price Change Fields. . . . 829
22.10 Master Inventory Price Change. . . . 829
Master Inventory Price Change Fields. . . . 829
22.11 Learning Metadata that Finance Uses. . . . 830
Adding Learning Withdraw (Cancellation) Policies. . . . 831
Adding Learning Cost Names. . . . 832
Activating Learning Currencies. . . . 834
Setting the Default Global Currency. . . . 838
Adding Learning Account Code Types. . . . 839
Adding Learning Discount Rates. . . . 840
Adding Allocation Types. . . . 841
Adding Allocation Codes. . . . 842

Setting Default Allocation Type and Code. . . . 843
22.12 Learning Metadata that Training Planner Uses. . . . 844
Adding Learning Employee Classifications. . . . 844
Adding Learning Employee Statuses. . . . 845
Adding Learning Training Planner Reporting Legal Entity. . . . 846
Adding Learning Training Planner Training Actions. . . . 847
Adding Learning Training Funding. . . . 847
Adding Learning Training Planner Programs. . . . 848
Adding Learning Training Planner Request Periods. . . . 848
22.13 FINANCIAL 849
Refund on Re-Enroll into the Same Course. . . . 857
22.14 BOOTSTRAP-PAYMENT-GATEWAY. . . . 858
22.15 Training Planner Automatic Assignment Properties. . . . 859

23 Learning System Administration. . . . 861
23.1 Learning Administrator Management. . . . 861
Creating Administrators in Learning Administration. . . . 861
Updating Learning Administrator Basic Account Information. . . . 862
Assigning Roles to SAP SuccessFactors Learning Administrators. . . . 863
Generating a Client Secret for Learning Administrator Accounts. . . . 864
Changing the Administrator View of Learning Pages. . . . 865
Restoring the Default Administrator Views of SAP SuccessFactors Learning Pages. . . . 867
Administrator Management Summary Fields. . . . 868
SAP SuccessFactors Learning Administrator Management Preferences. . . . 869
Administrator Display Properties in LMS_ADMIN. . . . 870
23.2 Learning User Experience Configuration. . . . 872
Placing Learning Users into Security Roles. . . . 872
Adding Learning Easy Links. . . . 873
Integrated Learning Settings for the New Learning Experience. . . . 874
Adding Custom Tiles. . . . 875
Adding Default Content Images to SAP SuccessFactors Learning. . . . 882
Allowing Managers to Remove Alternate Managers. . . . 887
Warning Supervisors of Employees Who are Already Engaged in a Course. . . . 888
Enabling SAP SuccessFactorsCourse Catalog 3.0. . . . 893
Hiding Learning Item Revision Information from Users. . . . 900
Enabling Learning Approval Waivers for Managers and HRBP Users. . . . 901
Setting Course Defaults for Learning Completion. . . . 902
Showing Price to Users. . . . 903
Configuring Single-Word Library Search Prefixes. . . . 904
Setting Default Web Library Results View. . . . 905
Controlling Managers' View of Employees in Learning. . . . 906
Updating Learning Manager and User Tools. . . . 907

Editing the Instructional Text on Learning Manager Dashboards. 908
Masking User IDs in SAP SuccessFactors Learning Reports and Notifications. 909
Showing or Hiding the My Learning Assignments Filter. 909
User Login and New Account Panels. 910
Delegate Settings Global Variables. 910
Rules of Learning Manager Approval Waiver. 911
General User Settings. 912
Administrator and User Shared Properties in LMS_ADMIN. 915
User Settings. 917
End User Interface Interaction Preferences in LMS_ADMIN. 918
Warning Users Before They Navigate to an External Website. 925
USER LEARNING PLAN. 926
23.3 Learning Registration, Learning Activity, and Completion Behaviors. 927
Enabling Waitlists. 927
Enabling Class Requests as Default. 928
Customizing Certificates of Completion. 933
Administration Approvals in Learning. 939
Enabling Content Object Level Auditing in SAP SuccessFactors Learning. 1030
Pushing Offline Player to Users' Workstations. 1032
Default Course Registration Settings. 1034
ATTACHMENT System Properties File. 1037
23.4 Learning Application Configuration. 1038
Generating an Admin Level System Client Secret for the SAP SuccessFactors Learning System 1038
Forcing System Generated IDs. 1039
Configuring Attachment Logic and Limits in SAP SuccessFactors Learning. 1041
Adding Custom Fields. 1044
Data Purge. 1050
Entity Configuration. 1079
Content Player Configuration. 1080
Gamification Settings. 1080
Viewing Users and Administrators in Roles. 1083
Where to Read About Security Implementation. 1084
Security Implementation of SAP SuccessFactors Learning 1084
Detailed SAP SuccessFactors Learning Security Rules. 1085
The SAP SuccessFactors Learning PUBLIC Security Domain. 1086
LEARNER_SECURITY System Properties. 1086
Manage Passwords and Identity in Platform. 1087
General Global Application Settings. 1088
Learning Global Application Settings. 1092
Process for Enabling SAP SuccessFactors Learning Email Messages. 1093

Customizing Notifications in the Notification Editor. . . . 1123
SAP SuccessFactors Learning Notification Email Management. . . . 1179
Virtual Learning System Global Application Settings. . . . 1196
SAP SuccessFactors Learning Virtual Learning Service (VLS). . . . 1197
Attachment Limits in LMS_ADMIN 1197
SAP SuccessFactors Learning Administration Search Selectors. . . . 1198
SAP SuccessFactors Learning Help Configuration. . . . 1200
ENTITY_IMPORT. . . . 1200
DIRECT_LINK. . . . 1201
User-Created Account (Global). . . . 1201
USER GENERATED CONTENT. . . . 1204
SAP SuccessFactors Learning System Properties in LMS_ADMIN. . . . 1205
Specific Error Codes for API Validation. . . . 1207
Logging Properties in LMS_ADMIN. . . . 1207
REPORT_SYSTEM System Properties. . . . 1208
SEARCH System Properties. . . . 1213
REPORT System Properties. . . . 1217
23.5 Learning System Operation. . . . 1217
Downloading an Installation Qualification Report. . . . 1217
Troubleshooting Connectors. . . . 1218
Scheduling a Background Job. . . . 1238
Troubleshooting Learning Automatic Processes. . . . 1240
Scheduling Learning Automatic Processes. . . . 1245
SAP SuccessFactors Learning Sites. . . . 1265
Tools for SAP SuccessFactors Learning System Administration. . . . 1276
23.6 SAP SuccessFactors Learning System Configuration. . . . 1289
23.7 Environment. . . . 1290
23.8 Timeout Behavior in SAP SuccessFactors Learning. . . . 1291

24 SAP SuccessFactors Learning Reference Data. . . . 1292
24.1 Importing SAP SuccessFactors Learning References. . . . 1292
24.2 Learning Calendars and Time References. . . . 1293
SAP SuccessFactors Learning Date Format Patterns. . . . 1294
Holidays in Learning. . . . 1294
Holiday Profiles in Learning. . . . 1295
SAP SuccessFactors Learning Time Zones. . . . 1296
Work Week Profiles in Learning. . . . 1298
24.3 Geography References for Learning. . . . 1299
SAP SuccessFactors Learning Countries. . . . 1300
Job Locations in Learning. . . . 1301
SAP SuccessFactors Learning Labels. . . . 1301
Locales in SAP SuccessFactors Learning. . . . 1304

SAP SuccessFactors Learning Locale Labels Search. 1307
24.4 Learning References. 1308
SAP SuccessFactors Learning Resource Blocks 1309
24.5 Categorization for Competencies in Learning. 1309
24.6 Learning System Administration References. 1310
SAP SuccessFactors Learning Report Groups Fields. 1310
24.7 SAP SuccessFactors Learning User Management References. 1312
Why Avoid Learning Job Grade Metadata. 1312

25 SAP SuccessFactors Learning Reports. 1313
25.1 Running Reports in Learning. 1313
25.2 Scheduling SAP SuccessFactors Learning Reports. 1315
25.3 Configuring SFTP Learning Reports. 1316
25.4 Sending Learning Reports to a Specific SFTP Server. 1317
25.5 Downloading Learning Report Designer. 1318
25.6 Importing Reports. 1319
25.7 Auditing Changes Made to User Personal Information in SAP SuccessFactors Learning. 1321
25.8 Auditing Changes Made by a Learning Administrator in SAP SuccessFactors Learning. 1322
25.9 Auditing User Information Stored in SAP SuccessFactors Learning for Native Users. 1323
25.10 Exporting Reports. 1324
25.11 Exporting Report Libraries. 1325
25.12 Publishing a Report. 1326
25.13 Version Up a Published Report. 1326
25.14 Basic Report Tasks. 1327
25.15 Advanced Report Tasks. 1327
25.16 Reports Tab. 1327
25.17 Run Report Page. 1328
25.18 Report Jobs Tab. 1328
25.19 Saving a Report. 1329
25.20 Saved Reports Tab. 1329
25.21 Data Privacy Auditing for Learning Native Only Customers. 1330
25.22 Editing Report Details. 1330
25.23 Editing Report Definitions and Configuration. 1331
25.24 Unpublishing a Report. 1332
25.25 Deleting a Report. 1332
25.26 Report Permissions. 1333
25.27 Communication Checklist with Report Writers. 1335
Communication Checklist for Importing Reports. 1335
Communication Checklist for Exporting Reports. 1336
25.28 Testing Reports. 1336
25.29 Troubleshooting the Report Import Process. 1337
25.30 Troubleshooting Reports. 1337

Common Configuration Issues with Plateau Report Designer. . . . 1338
Troubleshooting Report SQL. . . . 1338
BIRT Behavior to Avoid. . . . 1339
SAP SuccessFactors Learning Report Query. . . . 1340
Enabling the Report Query View. . . . 1340
25.31 Notification About Disabled Report Jobs in Learning. . . . 1341
25.32 Setting up a Plateau Report Designer Account. . . . 1341
What your Project Manager Provides. . . . 1342
Your Responsibilities as an Administrator. . . . 1342

26 Personalization Options in Learning Administration. . . . 1345
26.1 Personalizing Your SAP SuccessFactors Learning Home Page Layout. . . . 1345
26.2 Disabling Guide Me Mode for your Home Page. . . . 1346
26.3 Saving Searches or Revising Saved Searches in Learning Administration. . . . 1346
26.4 Using Filters to Narrow Searches in Learning Administration. . . . 1347
26.5 The Components of Learning Administration Search. . . . 1348
26.6 Recents. . . . 1348

27 Translating Strings in Learning. . . . 1350

28 Not all Learning Settings Documented. . . . 1351

29 Deleting Programs from Learning History. . . . 1352

30 Removing Programs from Users. . . . 1353

31 Adding New Programs to Users. . . . 1354

32 Viewing the Programs Table on Item. . . . 1355

33 Migration of Learning Competencies to Center of Capabilities. . . . 1356

34 Qualtrics Email Feedback for Learning Completion. . . . 1360

35 Learning Recommendations, Assignments, and Searching Courses in Opportunity Marketplace 1361
35.1 Enabling Learning Recommendations in Opportunity Marketplace. . . . 1363
Adding Administrator Recommendations in SAP SuccessFactors Learning. . . . 1364
Adding Peer Recommendations in SAP SuccessFactors Learning. . . . 1365

36 SAP SuccessFactors Learning Terminology Glossary. . . . 1366

1 Learning Administration

Learning administrators use Learning Administration to manage your Learning Management System (LMS), including learner profiles, learning content, learning needs management, and the LMS itself.

Learning Administration is a workspace for enabling and administering the Learning Management System (LMS). With it, you can:

- Manage learner profiles: the information about users that you pulled into Learning for the purpose of managing their learning.
- Manage online content: the online course structure, sources, and content itself. You can define a structure for your content, including exams, you can configure third-party vendors of courses, and you can import your own content to a server you've defined.
- Manage learning needs: the process of defining your organizational learning needs and building a system to offer and track what your people are learning.
- Manage the LMS itself: the process to keep your LMS aligned with your organization as it grows, creates new organizational structures, changes policies that affect global settings, adds countries, defines new roles, and so on.

2 The Building Blocks of a Learning Management System

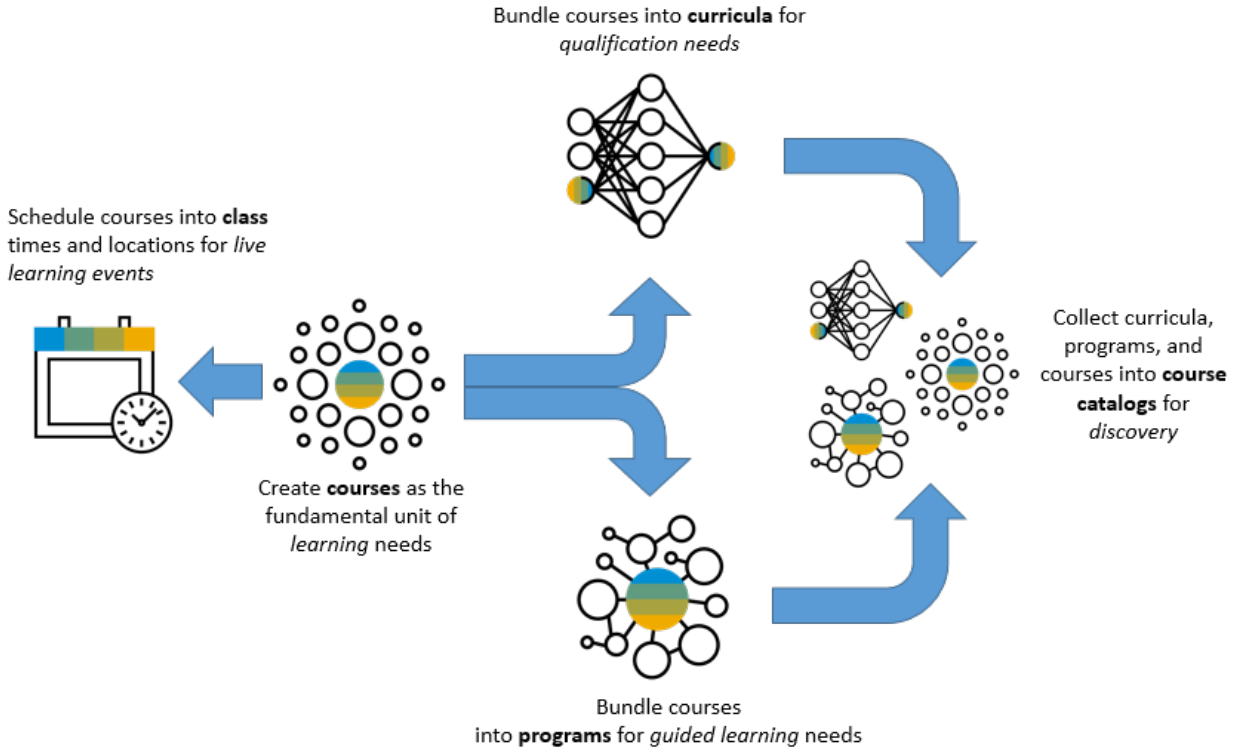
A Learning Management System (LMS), as a tool that shapes and tracks learning, provides you a way to combine units of learning, starting with **courses** as the smallest basic unit. Understanding how the units of learning interact help you design systems that meet your organizational learning needs.

In SAP SuccessFactors, the most basic unit of learning is a course. You can combine courses into bundles called programs and curricula, you can schedule courses into classes, and you can make courses available in course libraries, but you start with courses. The units of learning that define **how** users learn are:

- Courses
- Programs
- Curricula

Classes and course libraries are related to courses, programs, and curricula, but they define other interactions. Classes, for example, determine **when** users can learn. Libraries help users discover **what** they can learn (instances of courses, curricula, and programs).

> ⓘ Note
>
> SAP SuccessFactors does acknowledge cases when you **do not** start with courses. For example, you can create a program with an agenda that is a list of links to your intranet or you can add a tracked Standard Operating Procedure (SOP). But when you think through how you want to meet learning needs, you should start by thinking about courses.



How Users can Learn: Courses, Curricula, or Programs

Courses as the Fundamental Unit of Learning

Courses are the fundamental unit of learning because they are the smallest unit of learning that SAP SuccessFactors uses to **track completion**. When you acknowledge that one of your employees has, for example, completed a Cardiopulmonary Resuscitation (CPR) course, you track that the user has completed the course. The CPR course might also be a part of curriculum or a program that is tracking their progress, but once the employee has completed the CPR course, it shows on their transcript (learning history) that they completed it.

> → Tip
>
> You stretch the idea of a course beyond its traditional idea (content that you view or a class that you attend), but even the nontraditional definitions see a course smallest unit of completion.

Because courses are the smallest unit that tracks completion, they are also the smallest unit of learning need. You create courses to fill a learning need and you want to track that users have completed courses for that learning need. For example, you might identify that individual contributors need to improve their communication competencies to become managers. You create courses for communication skills (the need) and you track the course to completion to verify that the need is addressed.

Combining Courses into Programs as Guided Learning

Programs are guided learning that often use courses as an important building block. A program guides users through a set of courses and other experiences to lead to an outcome that does **not** result in qualification

(curricula result in qualifications). For example, you can create a program that helps users transition from individual contributors to managers. They might start their guided learning with a video from the head of Human Resources that speaks to them about the importance of managers. The video a link, not a course, and therefore cannot be tracked as complete. The program should also include courses like a communication skills course.

Combining Courses into Curricula for Qualification Needs

Curricula are bundles of courses that have strict rules that lead to qualification. They are like programs because they bundle courses, but because they lead to qualification, and qualification requires tracking they include **only**courses. They also include reassignment to keep learners current on their qualification. For example, a swimming lifeguard must keep qualified in lifesaving techniques. Most qualification systems require a passing grade in a complete CPR course at a set schedule (such as annually). These strict rules of completion and retraining are what set curricula apart from programs.

> ⓘ Note
>
> Learners technically complete courses **not** curricula because they must **remain** qualified in the curriculum. The curriculum is always assigned. But in casual conversation, learners say that they completed this years' curriculum or their current curriculum requirements. What they mean is that they are up to date in their course completions for the curriculum.

3 General Display Name

You can now use the name format of People Profile on the UI pages of SAP SuccessFactors Learning. A new admin option, *Enable adoption of General Display Name*, is added to control it.

If you've configured the *Name Format for General Display* field in Legal Entity and enabled the *Enable the name format selected in Configure People Profile to apply globally* and the *Enable adoption of General Display Name* options in the *Company System and Logo Settings* admin page, you can now see the name format that you've configured on UI pages of features that have adopted general display name in Learning as well.

3.1 General Display Name Implementation in Learning

General Display Name is implemented across various features in Learning for personas including Learner, Manager, Instructor, and Administrator.

The following table summarizes personas and pages within Learning where General Display Name is implemented.

General Display Name Implementation in Learning

Persona	Feature	Notes
Learner	Certificate of Completion	
Learner	Course Home	
Learner	Learning Plan	
Learner	Learning Recommendations	
Learner	Offline Player	If you have enabled *General Display Name* and are logged into the *Offline Player*, log out and log back into the Offline Player application to ensure that the general display name is displayed.
Learner	Survey	
Learner	Collections	
Learner	Bookmarks	
Manager	My Team	
Manager	Manage Reportee Assignments	
Manager	Manage Delegates	
Manager	Assign Alternate Managers	
Manager	Completed Work	This feature is applicable for reportees and displays the learning history status of the reportee.
Manager	Curriculum Status	This feature is applicable for reportees.

Persona	Feature	Notes
Manager	External Learning Requests	This feature is applicable for reportees.
Manager	Training Planner	This feature is applicable for reportees.
Instructor	Class Roster	This feature allows an instructor to generate a roster.
Instructor	Class Details	This feature allows an instructor to view users in a class.
Instructor	Enroll Users	This feature allows an instructor to enroll and add users to a class.
Instructor	Record Completion for Users	This feature allows an instructor to record completion for a user and add corresponding details to the Learning History Completion.
Administrator	User Learning	
Administrator	Curricula	
Administrator	Libraries	
Administrator	User	
Administrator	Classes	
Administrator	References	
Administrator	Manage Learning Activities	
Administrator	People	
Learner, Manager	To-Do and Approval Homepage Cards	If you have enabled *General Display Name* and create a new card thereafter, the new card displays the general display name, while older cards will continue to show the fully formatted name.
Learner, Manager	Learning History	
Learner, Manager	Learning Approvals	
Learner, Manager	Typeahead Search	
Learner, Manager, Instructor, Administrator	Story Reports	
Learner, Manager, Instructor, Administrator	Learner Notifications	

> **Note**
>
> - Learner doesn't include Learning-Only Users as it is not *General Display Name* enabled.
> - All courses that are assigned after enabling *General Display Name* displays the general display name. If the course was assigned before enabling *General Display Name*, it will continue to show the fully formatted name of the assignor.

General Display Name is not implemented for the following features:

- SAP Jam integration with Course Home

- Gamification
- Reports generated using Plateau Designer Report (PRD)
  To use General Display Name, you can alternatively use Story Reports.

3.2 Validating SF User Connector Configuration

Use the SF User connector to ensure that the General Display Name is being displayed for all user entities when the connector is executed.

Prerequisites

The `General Display Name` field mapping is available in the SF User connector. For the connector to identify the username values from the user file, ensure to use the `DISPLAYNAME` field.

Context

If you are using the *Integration Center* job from Employee Central to generate the user file, ensure to add the display name to the Integration Center file. Additionally, configure the field-mapping at the connector level to match General Display Name to `DISPLAY_NAME` to inherit General Display Name inside Learning.

However, if you are using *Employee Export*, the file containing username values will automatically contain General Display Name as a newly added field. You are not required to make any further modifications to inherit General Display Name inside Learning.

To verify the presence of the General Display Name field in the SF User connector:

Procedure

1. Go to SAP SuccessFactors *Learning Administration* and then go to *System Administration* > *Configuration* > *System Configuration*.
2. In the *Configuration* section, click the edit icon corresponding to *CONNECTORS*.
3. Search for `sfuser.field.mapping.data.GENERAL_DISPLAY_NAME=DISPLAYNAME`.

   If the search result returns an entry that matches the exact label entered in the search field, it suggests that General Display Name is available within the SF User connector.

3.3 Validating User Connector Configuration

Use the User connector to inherit General Display Name for LMS-only learners and site users.

Prerequisites

The `General Display Name` field mapping is available in the User connector. For the connector to identify the username values from the user file, ensure to use the `GENERAL_DISPLAY_NAME` field.

Context

You can verify the presence of the General Display Name field in the User connector.

Procedure

1. Go to SAP SuccessFactors *Learning Administration* and then go to *System Administration* > *Configuration* > *System Configuration*.
2. In the *Configuration* section, click the edit icon corresponding to *CONNECTORS*.
3. Search for `user.field.mapping.data.GENERAL_DISPLAY_NAME=GENERAL_DISPLAY_NAME`.

   If the search result returns an entry that matches the exact label entered in the search field, it suggests that General Display Name is available within the SuccessFactors User connector.

3.4 Synchronizing Configurations from BizX into LMS

A new Automatic Process Management (APM) job called SAP SuccessFactors Platform Configuration Synchronization is introduced to synchronize configurations from BizX into LMS.

This APM job pulls the General Display Name enablement details from BizX into LMS and a new workflow called Edit Platform Configuration Synchronization Automatic Process is added to the "ALL" role allowing administrators to view errors related to this job.

> **Note**
>
> This system level job does't allow administrators to modify the frequency or create an ad-hoc schedule for the job. Currently, the job is configured to run every 4 hours.

3.5 General Display Name Implementation for Learning Notifications

SAP SuccessFactors notifications are email templates that control the format and content of email messages sent from SAP SuccessFactors Learning.

If *General Display Name* is enabled, all full-name tokens appearing in the notifications will be replaced with the general display name.

> **Note**
>
> - Notifications without full-name tokens in the past are now introduced with these tokens.
> - None of the notification templates have been modified. However, additional notification tokens are now available.

If a notification does not use these full-name tokens when *General Display Name* is enabled, then the user will have to update it with these full-name tokens in order to see the general display name.

The following learner notifications are *General Display Name* enabled:

- Adhoc Notifications
- AlternateSubordinateNotification
- ApmInstanceDelivery
- ApmRecommendationsNewsletter
- ApmSupervisorLearningPlanNotification
- ApmSynchronizeStudentChangesAssignmentProfile
- ApmTrainingExpiration
- ApmTrainingOverdue
- ApmWaitlistRequest
- ApprovalProcessApprovalProgressed
- DelegateeEmail
- DelegationAssignment
- EmployeeEnrollmentDigest
- ExternalLearningRequestApprovalRequired
- ExternalLinkRecommendations
- InstructorAssignmentNotification
- RecordLearningApproval
- SystemEnrollmentNotification
- SystemScheduleCancellationNotification
- SystemUnenrollmentNotification
- TaskChecklistObservationRequest
- TrainingNeedsRejectedByOrgOwner
- TrainingNeedsRejectedByOrgOwnerforSupervisor
- TrainingNeedsRequested
- VLE_ENROLLMENT

- VLE_EVENT_CREATION
- VLE_EVENT_DELETION
- VLE_EVENT_UPDATE
- VLE_EVENT_UPDAT_ STUDENTS
- VLE_UNENROLLMENT

4 Adding Courses, Programs and Curricula

In SAP SuccessFactors, you add courses, programs, and curricula so that learners can find learning opportunities.

A learning needs management process can happen at any time, but it usually occurs annually. For example, you might meet in the fall as a learning organization to assess next years' learning needs and create opportunities for your learners. You might also meet more frequently, like monthly, but the process is the same. You investigate what your learners should learn and you create opportunities for them.

Your learning needs management process likely differs from other organizations, and it's often conducted outside of SAP SuccessFactors, but after you agree on the learning needs for your organization, you add courses, programs, and curricula to create learning opportunities for your people. Although we have some advice for learning needs management, we limit the advice to thoughts about how you can work well with the LMS and when you're ready to create units of learning in SAP SuccessFactors:

- Courses (and the classes that you schedule of the courses)
- Programs
- Curricula

> **Note**
>
> Although we do provide other learning mechanisms, like link collections and Quick Guides, they're learner generated content and so they don't come under the more formal learning needs management process.

What to Prepare Before you Add Courses, Curricula, and Programs

Before you begin a learning needs management process, it helps to review a few prerequisites. You typically add these prerequisites when you implement, but your organization changes over time. A review can save you time later.

- Review your learning resources, including base costs of you're using Finance. You might have new instructors, for example, or you might have added or removed a training location.
- If you use them, review your learning design elements: objectives, tasks, and requirements. Some organizations use the elements to help them design their courses.
- Review your learner profiles to make sure that you have the learning attributes you later assign learning needs to the learners.

When to Prepare Assessments, Including Task Checklists

Consider creating assessments before you begin learning needs management because they clarify learning needs: if it's worth assessing, then it is worth teaching. You should consider preparing assessments first especially if you're building formal exams. You need time to build your question library, objective pools, and exam rules, including translation before you begin creating the courses that use the exams.

If you're using task checklists, prepare the tasks before you begin. Then, when you create the courses that contain the task checklists, you have the tasks ready.

Quiz assessments are different because they're smaller and less formal. You can more easily add quizzes to courses in the middle of your learning needs management process.

When to Add Learning Content to Courses

Although you can update online learning content at any time, consider adding content after you define learning needs through online courses. When you add learning content after defining the courses, programs, and curricula, you have a well-considered structure and you're connecting content to it.

5 Courses: Fundamental Building Blocks of Learning

In SAP SuccessFactors, a course is the fundamental unit of learning that you can track to completion, combine into programs or curricula, or schedule into classes.

Courses teach learning objectives and can be assigned to users and tracked to completion. You assign courses to learners because you want them to achieve the course learning objectives. Learners assign courses to themselves because they want to achieve the learning objectives.

Courses are also units of learning that you combine into programs or curricula. A program is guided learning process, which usually includes courses. Learners progress through the program, building skills and knowledge as the complete the courses.

Finally, you schedule courses into classes. Courses become the template for all their classes. For example, a university course called Introduction to Physics can be scheduled at many times. Each instance of Introduction to Physics covers the fundamentals of physics with the same materials. Each instance, however, is taught by a different instructor, in a different room, and at a different time. In this example, Introduction to Physics is a course. Each scheduled instance of the learning item is a class.

5.1 Adding Items

You can add items to offer a greater number of learning contents with different types.

Context

Adding items in the new Learning Administration brings parity with the old UI, and also provides an enhanced user experience. Types of items that you can add are:

- Instructor- Led
- Online Only
- Instructor-led with online content
- Other

Procedure

1. Go to SAP SuccessFactors Learning Administration, and choose *Learning Activities* > *Items*.
2. Choose *Add New* and choose an *Item Classification*, *Locale*, and *Item Type*.

The page will refresh and display any other relevant or required fields, depending on the *Item Classification*.

3. Fill out the required fields.

> **Note**
>
> - If you want to display any custom field in the *New Item* page, then select *Display* for them in *System Administration* > *Configuration* > *Entity Configuration*. Once you do that, they become visible in the *New Item* page. Alternatively, you can decide to hide fields in the *New Item* page by deselecting it in *Entity Configuration*.
> - The *Revision Number* field can accept up to 90 characters.

4. Choose *Save*.

5.2 Creating Instructor-Led Courses

Create instructor-led courses when the course is live with an instructor: when it includes no online components and the instructor is always leading the class.

Context

Live courses are the traditional, instructor-led course offerings. Whether they're delivered in a physical classroom or a virtual meeting space, they're conducted by an instructor. Because these courses are live, they're scheduled at specific times, dates, and meeting spaces. We treat them differently than, for example, an on-demand course that users can launch at any time.

In the summary, you must provide all **required** information before the system allows you to continue. We recommend that you expand the additional options area to verify that the system-provided information is accurate and that you complete any additional information that is important to your company.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*
2. Click *Add New*.
3. In *Add New Item*, enter the required information.

   These fields populate the learning summary fields of the object. You can change them later except for *Item Type* and *ID*. The following fields are mandatory fields.

This Field...	...Is used as follows
Locale	Select a language for the new item you add . This is useful if the language of your audience differs from your native/official language.
Item Type	Select an item type that categorizes the item (for example, a course, an exam, or on-the-job training) in the user interface. As an administrator, you can use an item type as a filter in searches and reports. You can create or modify item types in the Item Types section (*References* > *Learning Activities* > *Item Types*).
Item ID	Select *Instructor Led* from the dropdown list. After you select an item type, you must manually enter a unique item ID that users can search for in the user interface. We recommend that you create a descriptive naming strategy so that users can identify the item more easily. If you want to create an introductory course for basic CPR, for example, then you might enter an item ID like "CPR_Level1".
Security Domain ID	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.

4. Choose *Add*.

   The item editor page opens.

5. Go to *Agenda Template* and choose + (*Add Time Slot*).
6. In *Add Time Slot*, provide the required information.

This Field...	...Is used as follows
Day	Enter the number of days that you expect the instructor needs for the course and the number of hours that instructor needs each day.
Description	Because the content of the *Description* box doesn't appear in the user interface, we recommend that you use it to describe the time slot (for example, **Morning Session** or **Afternoon Lab**) to other administrators.
Duration (hours)	Enter a number of hours in the *Duration* box that indicates the length of each segment.
Delay Start (hours)	If the item has more than one time slot on the **same** day, then you can enter a number of hours in the *Delay Start* field of each **subsequent** time slot to indicate the amount of time between the second and first time slots, the third and second time slots, and so on. We recommend that you enter a number in the *Delay Start* field to account for a lunch or an extended break. **Note** Enter a decimal value if you want the delay to be less than one hour (for example, 0.25 for a 15-minute break).

This Field...	...Is used as follows
Location Type	You can select a location type (for example, a lab, conference center, or virtual classroom) to indicate the **type of location** (not the actual location) that best fits any class of this item. This information is for administrative purposes only and can't be viewed in the user interface.

7. Choose *Save* .

Related Information

Learning Item Details Fields [page 148]

5.2.1 Dividing a Learning Item into Agendas

Divide a course listing (a learning item) into more than one agenda when you need to separate the course by time periods that break in between or that require different equipment.

Context

Create agendas when you need to divide a course (a learning item) into time periods. For example, if a course lasts for three days, each day can be an agenda. Or, within one day, if your course switches rooms, you can create two agendas: one to take place in the first room and the second to take place in another room.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items* .
2. Find and open the learning item that you want to divide into agendas.
3. Go to *Agenda Template* and choose + *Add Agenda Template*
4. In *Day*, type a unique ID for the day that the agenda takes place.

   Typically, these are sequential numbers starting at **1**. Higher numbers are later days. To add multiple agendas to the same day, insert the same value in the *Day* box. To start the agenda on a new day, insert a unique value in the *Day* box.
5. In *Description*, type a description that helps others understand the content of the agenda.

   For example, if the agenda is lab exercises, you can type **Lab Exercises**.
6. In *Duration*, type the number of hours that the agenda lasts.

   For example, if the agenda lasts eight hours, type **8**.

7. If you repeat a number in *Days*, then type a number of hours in *Delay Start* to indicate the amount of time between the first and second agenda, the second and third agenda, and so on.

   > **Note**
   >
   > You can type a decimal value if you want the delay to be less than one hour (for example, **`0.25`** for a 15-minute break).

   For example, if you create two agendas on the first day for a morning and afternoon session, and if you want a one hour break between the two sessions, type **`1`** in *Delay Start*.
8. In *Location Type*, set the type of location required for this agenda.

   For example, if this agenda is lab work and therefore must take place in a lab location type, select that location type.

   > **Note**
   >
   > You aren't setting the exact location - that is set at the class - but instead indicating the type of location that the scheduler should select when setting up a class based on this learning item.
9. Click *Save*.

Next Steps

Choose ••• *More* and *Manage Equipment* in any agenda to specify the type of equipment that is needed for the agenda.

5.2.2 Creating Equal and Sequential Agendas of a Learning Item

Copy an agenda to use it as a template and copy it to sequential days in a course.

Prerequisites

Add the first day's agenda and associate it with the correct location type and equipment. The first day's agenda acts as the template that you copy into the additional days.

Context

You often need to define identical agendas for a course (learning item). For example, if you have a course that lasts three days and each day needs the same equipment and the same location type, you can create one agenda and then copy it to the next two days. The result is three equal agendas.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to work with.
3. If you haven't yet added the first agenda, in *Agenda Template*, click + *Add Agenda Template* .

   The first agenda acts as the template agenda, so make sure that you add the correct equipment types and location type.
4. In *Agenda*, click ••• *More* and *Manage Equipment*.
5. In *Number of Times to Copy*, type a number of additional days that should get this agenda template.

   For example, if you want to create a learning item with four equal agendas and you created the first agenda as your template, type **3** to create three more agendas in addition to your first template agenda.
6. Click *Copy*.

Next Steps

If you need to make exceptions to an agenda, you can change that individual agenda. For example, if you created four equal, eight-hour agendas, you might say that all agendas need the same equipment and location type, but the fourth agenda isn't eight hours in duration but four hours in duration. You can adjust the fourth agenda at this time.

5.2.3 Specifying the Type of Equipment That Must Be Present for Courses

In learning item time slots, you can specify the types of equipment that should be present for any class based on that learning item.

Context

In many cases, you need specify that a piece of equipment is available for any class based on a learning item. For example, if a learning item is a course to teach electricians how to install an electric panel, you can specify the types of equipment that they need to successfully complete the time slot of the course. In the learning item, you might specify that equipment like meters, circuit breakers, tool chests, and safety equipment must be available for every instance of the course during that time slot of the course.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.

2. Find and open the learning item that you want to work with.
3. Go to *Agenda Template*.
4. For each agenda that needs an equipment type, choose ••• (*More*) and then *Manage Equipment*.
5. Choose *add one or more from list*, and then search for the equipment type that you want to add.
6. For each equipment type that you want to add, in *Count* type a suggested count for the amount of the equipment type.

   The administrator who later schedules the course can override your suggestion.
7. For each equipment type that you want to add, select *Add*.
8. Choose *Apply Changes* to make sure that the equipment appears as added

5.2.4 Adding Materials to Learning Items

Add materials to learning items (courses) so that you can see the training materials that should be sent to users or instructors for the course and you can track the costs and price of the materials.

Prerequisites

Before you can add materials to learning items, you need to declare the materials in *References* > *Physical Resources* > *Materials*.

Context

Materials are consumed during training. For example, if the learning item (course) teaches electricians how to install equipment, the electricians might need wire, wire nuts, and junction boxes. You want to attach the materials to the learning item so that anyone scheduling the learning item knows that the wire, wire nuts, and junction boxes need to be sent for the training. Furthermore, if you are using commerce features to track the costs and price of training, you want the materials to show up in the cost and price of the learning item. You declare the costs and price on the material and it is added when SAP SuccessFactors Learning calculates realized costs.

> **Note**
>
> If you remove a material from this item, then the system also removes the material from any classes that are associated with this item.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.

2. Find and open the learning item that you want to change.
3. Click *Materials*.
4. Click *add one or more from list* to add a material.
5. In *Update the Materials for the Item*, define when the material should be sent, to whom, and how much of the material that person needs.

This Field...	Is Used as Follows...
Type	Select *Pre Work* if the materials should arrive before the training and *Post Work* if they should arrive after the training.
Offset	The number of days before or after the start of the course that the materials should arrive. If you select *Pre Work*, it is the number of days before. If you select *Post Work*, then it is the number of days after.
Target	If you select *User* then the material is for the user. If you select *Instructor* then the materials are for the instructor.
Count	This is the count, per person, that should be sent. For example, if the training requires five junction boxes per user, then the count is 5.

6. Click *Apply Changes*.

Related Information

Learning Materials [page 545]

5.2.5 Learning Item Agendas

A learning item agenda is a session of a course. For example, if a course meets for one week on Monday, Wednesday, and Friday, then the course has three agendas: one for each day.

If a course spans multiple days or multiple instructors, agendas are a useful way to divide the learning item (course). Examples:

- You create a learning item that is four days long. The course meets four days in a row beginning at 8 AM and ending at 3 PM. You can create one learning item with four 8 AM - 3 PM agendas.
- You create a learning item that is one day long but the first half meets in a virtual meeting room (uses the Virtual Learning Service, or VLS) and the second half is online learning content. You can create one learning item with two agendas: the first is for the VLS meeting and the second is for the online course.
- You create a learning item that is one day. You create one agenda for that learning item.

Learning item agendas are a template for classes that are scheduled for this learning item. For example, imagine that you create a learning item four agendas in a lab location type, with lab equipment types, and with a time span of eight hours each. When another administrator schedules the course (creates a class based on this learning item), the administrator sees that the template for the course takes place in a lab, with lab equipment, and over four, eight-hour days.

5.2.6 Where Your Set of SAP SuccessFactors Learning Courses Can Originate

The set of courses that you track is the list of all learning items in SAP SuccessFactors Learning. We provide multiple pathways to create your set of learning items.

You can choose one or many of these ways to create a set of courses (learning items) in SAP SuccessFactors Learning. Most companies use a mix of these strategies.

Connector Import

Large companies often use the learning item connector to import a list of courses from a third party. We provide a generic learning item connector and a specific Skillsoft connector. When you import learning items through a connector, you typically edit them in Learning Administration.

Open Content Network Import

If you use Open Content Network (OCN), then you can import content that is hosted by a third-party content vendor like Lynda.com or OpenSesame. The online course content remains on the vendor's site, but the tracking for who has completed the learning items occurs within SAP SuccessFactors Learning. When you import the content records from an OCN vendor, we automatically create the learning item so that you can track the content.

> **Note**
>
> All OCN content is classified as EXTERNAL-COURSE.

Content Import Tool

You can create learning items when you import content to a content deployment location. When you go to *Content* > *Import Content*, you have an option to create a new learning item when you import. In most cases, you need to return to the learning item to edit it after you create it through the content import tool.

Creating Learning Items Manually

You can always create learning items manually by going to *Learning Activities* > *Items*. If you primarily use one of the other methods, you sometimes need to create learning items manually during an exception: you just need to create a learning item quickly or you have a special case that doesn't work with the other methods.

Related Information

Creating Online Courses [page 45]
Creating Instructor-Led with Online Content Courses [page 74]
Importing Content to Add to an Existing Learning Item [page 770]
Importing New Online Course Content [page 775]
Importing Updated Content for an Existing Learning Item [page 772]
Importing Content to Enable it for Mobile or Offline Use in an Existing Learning Item [page 774]
Importing Open Content Network Items Manually [page 126]
Synchronizing Open Content Network Third-Party Provider Course Listings [page 1254]
OPEN CONTENT NETWORK System Property File [page 793]

5.2.7 Authorizing Many Instructors to Teach One Learning Item

Authorize many instructors to teach a single learning item (course) when you want to declare many instructors as qualified to teach a course.

Prerequisites

To demonstrate that an instructor is certified or qualified to teach one or more items, you can create a user entity for the instructor and manage those learning requirements and needs just like any other user. By managing the instructor's learning like any other user, you can ensure that the instructors meet their requirements before assigning them to lead a time slot of a class.

Context

If you're tracking instructors in SAP SuccessFactors Learning, then you can authorize them to teach a learning item. When you authorize an instructor to teach a learning item, you're declaring that the instructor is qualified to teach it. You can use the authorization to teach to make sure that primary instructors of this course are qualified. You can also use it to restrict exam proctoring to only authorized instructors.

> → Tip
>
> If you have one instructor and you want to authorize that one instructor to teach many learning items, you can do that in the instructor's record. Go to *People* > *Instructors* > *Authorized to Teach*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to authorize the instructors to teach.
3. On the *Instructors* tab, select *Check Instructor Authorization*.

   > → Tip
   >
   > If you ever need to quickly turn off the authorization check, you can clear *Check Instructor Authorization* and leave the instructors in place.

4. For each instructor who is authorized to teach this course, select *add one or more from list*, find the instructor, and then add the instructor.

   You see the instructor in the *Update the Authorized Instructors for the Item* list. You can also go to the instructor's entity and see this learning item listed in the instructor's authorizations.

Next Steps

If you need to remove an instructor, go to the *Update the Authorized Instructors for the Item* list, select the instructor's *Remove* checkbox, and then choose *Apply Changes*.

Related Information

Instructor Authorization to Teach [page 574]
Authorizing One Instructor to Teach Many Learning Items [page 556]

5.3 About Online Content

Online courses are almost always on-demand: Users launch them when they want at any time of the day because users don't need to wait for an instructor to lead them. On-demand courses aren't scheduled to specific times, dates, and meeting spaces. We treat them differently than, for example, a live course that must be scheduled with an instructor and at a designated time and place.

To organize the content structure you can add additional online contents, reorder them, edit, remove, and navigate to the individual contents. The online content settings are spread out through several tabs that appear in the order in which you interact with the online item

- Launch - define the launch behavior of online content.
- Course Progression - define the users' course progression in online content.
- Completion - define completion behavior and add to history settings.

- Objectives - view read-only versions of the objectives associated to the content objects.

You can only edit the folder name for any folder content that is part of the content structure.

You can only edit the content object name for any content object.

Once an item has been completed by at least one user, you can't add content types, remove content types, or move content types to be displayed in a different order.

5.4 Creating Online Courses

Create online courses when all of the learning content can be consumed online and on demand.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*
2. Choose *Add New*.
3. In *New Item*, choose *Online* as the *Item Classification*.
4. Select the default language of the learning item in the *Locale* dropdown.
5. Make selections for *Item Type* and *Completion Status* (required fields).
6. Complete the remaining fields in *New Item*.

   These fields populate the learning summary fields of the object. You can change them later except for *Item Type* and *Item ID*:

Field Name	Description
Item Type	Select an item type that categorizes the item (for example, a course, an exam, or on-the-job training). As an administrator, you can use an item type as a filter in searches and reports. You can create or modify item types in the Item Types section (*References* > *Learning Activities* > *Item Types*). Don't use the'|'(Pipe) character while giving a name to the Item Type.
Item ID	After you select an item type, you can either choose *Auto Generate ID* or manually enter a unique item ID that users can search for. We recommend that you create a descriptive naming strategy so that users can identify the item more easily. Don't use the'|'(Pipe) character while giving a name to the Item ID.

7. If you're tracking credit or contact hours, enter values in the *Course Overview* section.

Field Name	Description
Contact Hours	Most customers don't record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use contact hours. Contact hours are the total number of hours that you expect a user to have contact with an instructor. For example, if you set up a learning item that is instructor-led with online content for 8 total hours and, for 6 of those hours, you expect the user to be in an instructor-led time slot, then the contact hours equals 6.
Credit Hours	Most customers do not record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use credit hours. Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. universities, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equals 45; however, the college grants 3 **credit hours** for this class.
CPE Hours	CPE is an abbreviation for Continuing Professional Education and refers to learning activities that users perform to maintain and expand the skills that their profession demands. Some customers in some industries use CPE hours for certification. If you are in an industry that uses CPE hours for certification, please use the *CPE Hours* field instead of credit hours or contact hours. If you are not in an industry that uses hours to certify employees, you can ignore CPE hours.

8. If you're revising items, enter values in the *Version Details* section.

Field Name	Description
Revision Date and Time	If you're adding this at a later revision, enter the revision date. The revision date doesn't need to be today's date. If for example, you're bringing a learning item that was revised three years ago into the Learning Management System (LMS) today, then the revision date can be three years ago.
Revision Number	The same is true for revision number. The revision number often matches the revision number as provided by the oversight organization or by the content provider.

9. To save the new item, choose *Save*.

Next Steps

Add the online content to the new learning item.

Related Information

Learning Item Details Fields [page 148]
Adding Online Content to Courses [page 63]

5.4.1 Settings That Control Online Content in a Learning Item

SAP SuccessFactors Learning uses settings to control how online content behaves in individual learning items.

You can modify the online content settings of a learning item in *Learning Activities* > *Items* > *Online Content* > *(Settings)*. You can also set their values when you first import content in *Content* > *Import Content*.

Online Content Settings

This Field...	...Is used as follows
Content is available for launch (available for users)	If you select this checkbox, then users can access any content associated with this item in the user interface. Therefore, we recommend that you don't select this checkbox until after you finish developing or modifying the content so that users can't access it prematurely.
Automatically launch content when starting or resuming course	If you select this checkbox, the next logical content object launches automatically when a user starts or resumes a course. Enabling this setting can save a step for the user. When you want the user select a specific content object, like when you have a course that contains multiple content objects in different languages, don't enable this setting. If *Launch in a New Browser Window* is enabled and *Automatically launch content when starting or resuming course* is checked, the content will be automatically launched in the following scenarios: • The online content contains **one** content object and the selected Launch Method for the content object is *Browser*. • The online content contains **more than one** content object and the selected Launch Method for the **first** content object is *Browser*. The content **won't** automatically launch in scenarios different from those mentioned above, even when the *Automatically launch content when starting or resuming course* setting is checked.

This Field...	...Is used as follows
Launch in a New Browser Window	You can set course content to launch in a new browser window. (For the *Launch in a New Browser Window* option to be available, ensure that you've selected the *Display "Launch in a new Browser Window"* option for content objects option in *System Administration* > *Configuration* > *Global Applications Settings*.) **Note** Administrators can configure `overrideContentLaunchInNewWindow=true` in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN* to override the content-object level launch method for all content **except** browser-based and external content.
Add to History on Completion of All Content	If you select this checkbox, then the system automatically marks the item complete (and adds to learning history) after users complete all the objects that make up the item's content structure.
Add to History on Pass	If administrators designed exams or quizzes as part of the content structure for an item, then you can force the system to add learning history for a new, passed history record by selecting the *Add to History on Pass* checkbox. If you select the *Capture Content Object score as Item grade when recording learning* checkbox (*System Administration* > *Configuration* > *Global Applications Settings* > *General Settings*), then the system automatically records the score a user received on a content object that is associated with an item, but only if you configured the content object to add to history when passed or failed (by selecting the *Add to History on Pass* or *Add to History on Failure* checkbox *Learning Activities* > *Items* > *Online Content* > *(Settings)*). When the system records object score as an item grade, then the system makes that information (the content object score) viewable by users and administrators alike. **Note** This setting is available for AICC or SCORM 1.2 content objects only.

This Field...	...Is used as follows
Add to History on Failure	If administrators designed exams or quizzes as part of the content structure for an item, then you can force the system to record a new, failed history record by selecting the *Add to History on Failure* checkbox. If you select the *Capture Content Object score as Item grade when recording learning* checkbox (*System Administration* > *Configuration* > *Global Applications Settings* > *General Settings*), then the system automatically records the score a user received on a content object that is associated with an item, but only if you configured the content object to add to history when passed or failed (by selecting the *Add to History on Pass* or *Add to History on Failure* checkbox *Learning Activities* > *Items* > *Online Content* > *(Settings)*]). When the system records object score as an item grade, then the system makes that information (the content object score) viewable by users and administrators alike. **Note** This setting is available for AICC or SCORM 1.2 content objects only.
Complete Content in Sequence	If you select this checkbox,you can require users to complete all content within a created folder in sequential order.
Allow Assessment Review	Select this option to allow users to go back through the assessment and look at their performance. They see the feedback (if enabled) and the correct answer choices (if enabled).
Exam Duration	Set the duration of the non-resumable exam in hours and minutes.
Completion Status	From this list, you can select an online completion status that the system assigns to users after they complete the item. You can create or modify a completion status in the Completion Status section (*References* > *Learning Activities* > *Completion Status*).
Failure Status	From this list, you can select a failure status that the system assigns to users if they fail the item. If an administrator associates the item with an online exam and selects the *Mark item failed when exam failed* checkbox, then users receive this status if they attempt to complete the exam but don't score a passing grade. Users might also receive this status if they attempt to exceed the maximum number of tries for the exam that you configured on the exam entity (*Content* > *Exam Objects (Legacy)* > *Summary*). **Note** If you don't select an online failure status, then the system doesn't record when a user fails an online exam.

This Field...	...Is used as follows
Failure Action	Set a failure action to control what happens when a user fails the online portion of the learning item. • *Lock item after failure* locks the learning item. If users reach the failure limit, they see a message on the learning item that they're locked out. They must find a learning administrator to reset their attempts to zero by granting them access to the learning item again. • *Remove Learning Item from Learning Plan (free-floating only)* removes the course from the users' assignments. If users reach the failure limit, they no longer see the learning item in their assignments. If this learning item isn't directly assigned (if it's assigned through a curriculum, for example), the learning item **isn't** removed. • If you don't make a selection, then users can attempt the learning item as often as they want. This doesn't, however, mean that they can attempt any associated assessments indefinitely. For example, you can give the user two attempts at the assessment (set its attempts limit to **2**). Users fail this learning item after attempting and failing the assessment twice, but if you don't lock them out, they can review the content of the learning item. **Note** After each assessment attempt for AICC without wrapper or SCORM 1.2 content that launches in a new window, the *Launch Content* button is disabled until the user selects the *Verify course completion* button or refreshes the page. This ensures the attempt is properly recorded on the Learning user interface and prevents the user from relaunching any failed content that is set to lock after a fixed number of attempts.
Times user can fail before action	In *Times user can fail before action*, type the number of attempts at the learning item that you want to grant to users. For example, if you type **2**, and if you select *Lock item after failure*, then users are locked out after their second failed attempt at the learning item.
Downloadable	You can select this checkbox if you want users to be able to download online content (excluding assessments and exam objects) to Plateau Offline. In the URL for offline download box, you must type the URI to the archive file that users can download. In the archive file, we recommend that you include all downloadable objects in the item's content structure.

This Field...	...Is used as follows
Lock Other Content When in Progress	If you select this, then the system restricts users from accessing any other online content objects while they are interacting with this content object. If the content object is an assessment and a user navigates away from the assessment to view other content, it exits the assessment and an exam attempt is recorded. **Note** After completing an assessment, the user must select the *Verify course completion* to unlock the other content.
Parameters	At the Item level the Parameters field is editable and can be changed from the originally stated URL that is assigned to the content object. For example, if the new URL posted here is pointing to a simple YouTube video then completion is based off of that instead of the actual content listed.
Reset User's Progress after Inactivity	In the *Reset User's Progress after Inactivity* box, you can enter a number of days after users launch the item that they have to complete it before the *Reset Online Course Progress* automatic process resets the user's progress for the item.
Users can Review Completed Content from History	Unless the content is locked due to failure, when you select this checkbox, users can access and launch online content for AICC and SCORM items in the user interface. Users can launch any content type except assessment from history. Content can be launched in any order and will launch inline or in a new window, based on the content object configuration.
AICC Max-Normal	The value that you insert in the *AICC Max-Normal* box represents the maximum number of content objects that the system can open simultaneously within that item. When administrators import multiple items through AICC, they can set this AICC Max-Normal value for those items by including a value for the MaxNormal property in the AICC CRS definition.
Complete Content on Launch	If you select this, the content will be marked as completed once it is launched. Not applicable to AICC content.
Mastery Score	In the Mastery Score box, you can (but do not need to) enter the minimum score (between 1 and 100) that users must achieve to receive a completed status for a specific content object. If users do not achieve the mastery score, then the system marks the content object as finished. Only applicable for SCORM and AICC content.
Content available only during specified time slot of a class	This setting controls whether or not users can access the content outside the scheduled class time. This setting is only visible when the *Unregistered User can Access Online Content* setting is disabled in *Learning Activities* > *Items* > *Item Details* (tab).

5.4.2 Adding Content Packages to a Learning Items

Add online content packages to courses to track when users complete the content packages and to organize content into a single course.

Prerequisites

Add the content objects to the system. You typically import content through the content import wizard. *Content* > *Import Content*.

Context

You can click *Add Content Package* to associate the item with a content package record.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item.
3. Go to *Online Content*, select *Add Content Package* from the dropdown list.
4. In *Add Content Package*, search for the content package that you want to add to the learning item.
5. Choose *OK*.
6. Choose *Save* on the *Online Content* page.

Related Information

Add SCORM Content as a Single Package [page 63]
OCN Content as Learning Item Content [page 63]
Adding Online Content to Courses [page 63]
Settings That Control Online Content in a Learning Item [page 47]

5.4.3 Adding Online Content Objects to Learning Items

Add online content objects to courses (learning items) to track when users complete the content objects and to organize content into a single course.

Prerequisites

Add the content objects to the system. You typically import content through the content import wizard. *Content* > *Import Content*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item.
3. Go to *Online Content* (tab), then choose ••• *More* and select *Add Content Object*.
4. In *Add Content Object*, search for the content object that you want to add to the learning item.
5. In *Object Title*, enter a name that helps users identify the nature of the object. Choose *OK* to save.

   For example, if the object applies to office management, then the title could be **Office Management**.
6. Choose *Settings* to access *Online Content Settings*, then navigate to the *Launch* tab.
7. If the content requires any parameters at launch, enter them in *Parameters*.

   These parameters append to the URL at launch.

   > ⓘ Note
   >
   > The parameters are defined by content developers of the courses, not by SAP SuccessFactors.
8. Optionally, on the *Completion* tab, use the *Mastery Score* field to enter the **minimum** score (between 1 and 100) that users must achieve to receive a completed status for a specific content object. If users don't achieve the mastery score, then the system marks the content object as finished.
9. Select *Complete Content on Launch* to mark the object complete when users launch the content in the user interface.
   - If this object is the **only** object in the learning item and if you select *Complete Content on Launch*, then the system also marks the **item** complete and users receive credit for completing the item.
   - If you do **not** select *Complete Content on Launch*, then administrators or users must record a learning event for this item to record its completion.

   > ⚠ Caution
   >
   > Do **not** select *Complete Content on Launch* if the content object reports its own status back. When you select *Complete Content on Launch*, the users are marked complete as soon as they launch the document. Instead, use this when you include content that can't report its status back, like an online video hosted on your intranet. Also, it isn't possible to set AICC Wrapper objects to complete upon launch.

10. To save your changes, choose *OK* and then choose *Save* on the *Online Content* page.

Related Information

Add SCORM Content as a Single Package [page 63]
OCN Content as Learning Item Content [page 63]
Adding Online Content to Courses [page 63]
Settings That Control Online Content in a Learning Item [page 47]

5.4.4 Adding Assessments to Learning Items

Add assessments to learning items (courses) to require an assessment as a part of passing the learning item.

Prerequisites

Create the assessment that you want to add. Go to *Content* > *Assessments*. Although you build both quizzes and exams in *Assessments*, quizzes are simpler than exams and configured separately.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item.
3. Go to *Online Content* (tab), then choose ••• *More* and select *Add Assessment*.
4. In *Assessment*, search for and select the assessment that you want to add to the learning item.
5. In *Assessment Title*, enter a name that helps users identify the nature of the assessment. Choose *OK* to save.

   For example, if the assessment applies to office management, then the title could be **Office Management Assessment**.
6. In *Settings*, decide on the behavior of the assessment.

Selection	Description
Lock Other Content When in Progress	If you select this, then the system restricts users from accessing any other online content objects (or opening a content object that they already completed) while they're in the process of completing the assessment. This means that if a user navigates away from the assessment to view other

Selection	Description
	content, it exits the assessment and an exam attempt is recorded.
Add to History on Pass	If you select this, then SAP SuccessFactors Learning marks the item complete when users pass the assessment. Users who pass the assessment receive the credited completion status that you associate with the item.
Add to History on Failure	If you select this, then SAP SuccessFactors Learning marks the item failed when users fail the associated assessment. Users who fail the assessment receive the non-credit failure status that you associate with the item (*Learning Activities* > *Items* > *Online Content*) and the item remains on each user's assignments list.

Related Information

Add SCORM Content as a Single Package [page 63]
OCN Content as Learning Item Content [page 63]
Adding Online Content to Courses [page 63]
Settings That Control Online Content in a Learning Item [page 47]

5.4.5 Organizing Online Learning Content for a Learning Item

Use folders to organize the online content of learning items (courses) in SAP SuccessFactors Learning.

Prerequisites

Create a new course of the classification online or instructor-led with online content.

Context

Within a learning item, add folders to structure the content and to force a sequence on top of your content: users must complete the objects in a folder in sequence. We recommend that you select *Create Folder* to create one or more folders to which you can add and organize any related online content. When you create a folder, you can select the *Complete Content In Sequence* checkbox on the *Course Progression* tab to require users to complete all content within the folder in sequential order.

> **Note**
>
> You can add a folder while you are creating a new learning item. If you want to add a folder at the time of creating the new learning item, you skip the steps finding and opening the learning item.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item.
3. Go to *Online Content* (tab), then choose ••• *More* and select *Create Folder*.
4. In *Folder Title*, enter the name of the folder. Choose *OK* to save.

   > **→ Tip**
   >
   > The folder name appears in the user interface, so type a name that helps users identify the nature of the object. For example, if the object applies to office management, then the title could be **Office Management**.

5. On the *Online Content* page, choose ••• *More* beside the content you'd like to move into the folder. Choose *Move*.
6. Select the folder from the list, then choose *Insert Inside*.
7. To require users to complete all content within the folder in sequential order, select *Complete Content In Sequence* in *Settings* > *Course Progression*.
8. To save your changes, choose *OK*, then choose *Save* on the *Online Content* page.

Next Steps

Add content to the folder.

Related Information

Add SCORM Content as a Single Package [page 63]
OCN Content as Learning Item Content [page 63]
Adding Online Content to Courses [page 63]
Settings That Control Online Content in a Learning Item [page 47]

5.4.6 Creating an Adaptive Online Course

Create an adaptive online course to adjust course content depending on users' real-time understanding of the course objectives.

Prerequisites

Create objectives to describe the knowledge you want users to possess and associate those objectives with content objects. You can do this in SAP SuccessFactors Learning administration by going to *Content* > *Content Objects* > *Objectives*.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the item that you want to work with.
3. Go to the *Online Content* tab for the item, then choose ••• *(More)* on the row containing the Root content, and then select *Add Assessment*.
4. Add the exam that tests the objectives for the adaptive content.

   An exam that tests objectives for the purpose of adapting content is called an **adaptive exam**.
5. Choose ••• *(More)* on the row containing the Root content, and then select *Add Content Object*.
6. Add the content object that teaches the objectives.

   Although it isn't required, consider enabling objective review so that your users have greater visibility into how the objectives connect the content object to the exam.
7. To adjust the placement of the exam in the order of content, choose ••• *(More)* on the row of the exam and then choose *Move*.
   - If you want to create a pre-test, where users skip content for objectives they have already mastered, place the exam above the content objects.
   - If you want to create a post-test, where users get a needs-review flag for objectives they didn't master, place the exam below the content objects.
8. Choose ⚙ (*Settings*) to adjust the settings for the adaptive course. On the *Completion* tab, a *Completion Status* is required.

   Enable the *Add to History on Completion of All Content* option to automatically mark the learning item as complete when all content and exam objects are marked as complete. In the case of adaptive exams, that could be because the user passed all objective questions in a pre-test, the user successfully completed all content objects that were presented, or because an administrator clears the Needs Review flags for failed content objects' objectives.

> **Note**
>
> For adaptive courses, we recommend that you **don't** select the *Automatically launch content when starting or resuming course* option (on the *Launch* tab). The content structure page tells users if elements of the structure need review, so you want to show the structure to users.

9. Choose *OK* to save your changes to the online content settings.
10. When you are finished adding and editing the online content, choose *Save*.

Related Information

Adaptive Online Course Types [page 64]
Tips for Configuring Online Exam Contents for Adaptive Learning [page 62]
Creating Adaptive Exams: Overview [page 686]
Organizing Online Learning Content for a Learning Item [page 55]
Adding Online Content Objects to Learning Items [page 53]
Add SCORM Content as a Single Package [page 63]
OCN Content as Learning Item Content [page 63]
Adding Online Content to Courses [page 63]
Settings That Control Online Content in a Learning Item [page 47]

5.4.7 Reassigning Online Learning Items after Modifying Them

If you modify an online course (learning item), you need to manage changes for users who have the course in their assignments list.

Context

When you modify the online settings of an existing learning item, it's probably already assigned to users and those users have probably made partial progress in the learning item. If users have made partial progress in the online content, then when you make changes, you see the *Reassignment Assistant*. It helps you manage the change to the learning item with the users who are assigned.

> **Caution**
>
> With the *Reassignment Assistant*, you can reassign the updated content to users. When you do, they lose all progress in the online content and must start over.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to modify, and then make your modifications in *Online Content*.
3. Choose *Save*.
4. Read the reassignment warnings, and then to proceed, choose *OK*.
5. To reassign the learning item to all users, select *Select all the Users of the search results*.

   It's common to have an all-or-nothing reassignment strategy. If it's important for one user to start over with the new content, then it's important for all users to start over with the new content.
6. To reassign the learning item to specific users, select their *Reassign* box.
7. Choose *Finish*.

Results

SAP SuccessFactors Learning reassigns the learning item to all users. They lose their progress in the learning item.

If there are many users to reassign, you might need to run the reassignment as a background job.

5.4.8 Removing Online Course Content

Remove online content in a learning item if you need to start over.

Prerequisites

> **Note**
>
> A course can't be removed if it has already been assigned to or started by users.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to work with.
3. Go to the *Online Content* tab.
4. Choose *Actions* > *Clear Online Settings*.
5. Select *Clear Online Settings* to reset all settings and remove all associated online content.

5.4.9 Locking or Removing Failed Online Courses

Lock or remove failed SAP SuccessFactors Learning online courses when you want users to check with a learning administrator to regain access after failing.

Prerequisites

If you depend on an assessment to evaluate users' passing or failing, set its attempt limit to greater than zero. Zero is a special value that allows unlimited attempts at the assessment. If you allow the user unlimited attempts, they can never fail it.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item with the content that you want to lock or remove after failed attempts.

   > **Note**
   >
   > If the course is already locked based on the item settings and the user has failed attempts then the item will remain locked until admin unlocks the item.

3. Go to *Online Content*, and then click *Settings*.
4. If you are using an assessment to determine pass and fail, set at least *Record learning event when content failed* and a failure status.

   > **Note**
   >
   > If you plan to use the record learning event tools to indicate failure, you can skip this step.

5. In *Failure Action*, select the behavior when users attempt and fail the online course.
   - *Lock item after failure* locks the learning item. If users reach the failure limit, they see a message on the learning item that they are locked out. They must find a learning administrator to reset their attempts to zero by granting them access to the learning item again.
   - *Remove Learning Item from Learning Plan (free-floating only)* removes the course from the users' assignments. If users reach the failure limit they no longer see the learning item in their assignments. If this learning item is not directly assigned (if it is assigned through a curriculum, for example), the learning item is **not** removed.
   - If you do not make a selection, then users can attempt the learning item as often as they want. This does not, however, mean that they can attempt any associated assessments indefinitely. For example, you can give the user two attempts at the assessment (set its attempts limit to **2**). Users fail this learning item after attempting and failing the assessment twice, but if you do not lock them out, they can review the content of the learning item.
6. In *Times user can fail before action*, type the number of attempts at the learning item that you want to grant to users.

For example, if you type **2**, and if you select *Lock item after failure*, then users are locked out after their second failed attempt at the learning item.

7. Click *OK* and then click *Save* on the *Online Content* page.

Next Steps

If you selected *Lock item after failure*, you can unlock users' access in the users' online status. Go to *People* > *Users*, search for the user who you want to unlock, and then go to *Online Status*. Find the learning item that is locked, and click *Object Details*.

Related Information

Clearing a Locked Exam or Learning Item for Users [page 598]
Legacy Exam Objects' Summary Fields [page 757]

5.4.10 Setting AICC Max Normal In a Course

Set AICC `Max_Normal` to set a control on a learning item for how many content objects can be open for credit at one time in a learning item.

Context

> **Note**
>
> It is unusual to set `Max_Normal` value in an individual course. In most cases, you inherit the default value, which we recommend that you set to **99**.

AICC Max Normal represents the maximum number of content objects that a user can access without completing it and receiving credit for it. If a user accesses a subsequent time that exceeds that number then the content object will not grant credit. When the number of incomplete content objects exceeds the Max Normal value, subsequent launches of AICC content are set with `credit="no credit"`. AICC `Lesson_Status` and `Score` values cannot be updated.

New courses (learning items) get the AICC max normal value from *Global Application Settings* by default when you create new learning items. Individual courses can override the default. Imported AICC courses can set their max normal values in the CRS definition.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Open the course (learning item) that you want to edit.
3. Go to *Online Content* >  > *(Settings)* > *Completion* (tab).
4. Set the value in *AICC Max-Normal*.
5. Choose *OK* to save your changes.

5.4.11 Tips for Configuring Online Exam Contents for Adaptive Learning

View this section if you want to know about tips for configuring online exam contents for adaptive learning.

You can configure online exam contents for adaptive learning basically in two modules: the online settings of the items (*Learning Activities* > *Items* > *Online Settings*) and on the Exam Objects itself (*Content* > *Exam Objects*).

Pre-test

- On the exam object (*Content* > *Exam Objects*), set the *Pass Percentage* to zero (0). This is because passing isn't a requirement.
- Set the exam object *Maximum tries* to one (1) because you don't want the user to take the pre-test multiple times.
- In the Edit Exam Analysis module, check the *Analyze the exam results* check box and ensure that the *Set Flags Pass Objectives* and *Set Flag Failed Objectives* check boxes are checked.

Post test

- On the online setting tab of the item (*Learning Activities* > *Item* > *Online Settings*), check the *Mark item complete when all objects are complete* check box.
- In the Edit Exam Analysis module, check the *Analyze the exam results* check box and ensure that the *Clear Flags Pass Objectives* and *Clear Flags for Failed Objectives* check boxes are checked. This is helpful for remediation.

5.4.12 Add SCORM Content as a Single Package

Shareable Content Object Reference Model (SCORM) content is a set of standards for online learning. When you add SCORM content, add it as a single package.

SCORM 2004 online content is usually delivered to your organization as an entire content package. That package includes a manifest file and content objects. It is assembled so that all its objects work together, so you must add the package as one unit. Do **not** extract the package or add SCORM content as individual content objects.

5.4.13 OCN Content as Learning Item Content

Open Content Network (OCN) courseware is different from the content that you import and then add to a learning item's *Online Content Network* section. Each OCN course and courseware is an independent learning item: there is no content to add.

With standard online learning items, you must create a learning item record (a course) and then import content to it. OCN courses are simpler: you tell SAP SuccessFactors Learning which courses you want to import from the OCN provider and SAP SuccessFactors Learning creates the learning item and also the links to the content, which is hosted at the OCN provider.

To tell SAP SuccessFactors Learning which OCN courses you want to track as learning items, you import the OCN courses. To import the OCN courses, go to SAP SuccessFactors Learning administration and then go to *Content* > *Open Content Network*.

> ⓘ Note
>
> - To import OCN courses, you must first implement a connection to the OCN provider. Please read the OCN implementation guide for more information.
> -

> ⓘ Note

Related Information

Importing Open Content Network Items Manually [page 126]
Synchronizing Open Content Network Third-Party Provider Course Listings [page 1254]
OPEN CONTENT NETWORK System Property File [page 793]

5.4.14 Adding Online Content to Courses

SAP SuccessFactors Learning provides more than one pathway and more than one type of online course structure.

You can add online content to courses in the following ways:

- You can add online content to a learning item that already exists. Go to *Learning Activities* > *Items*, open the learning item, and then add the content in *Online Content*. To add the content, the item classification must be online (on demand) or instructor-led with online content, and the content must exist.
- You can import the content and create a learning item to wrap the content at the time of import. To import content, go to *Content* > *Import Content*.

> **Note**
>
> You can now add multiple contents to Open Content Network (OCN) courses. The OCN course gets automatically updated with the newly added content, and these contents are automatically assigned to the assigned learners of the OCN course. The **ReassignOCNCourseItemToStudentApmJob** background job runs every 6 hours, but you can also schedule the job to be run on-demand by running the **Open Content Network Content Synchronization** automatic process.

Related Information

Creating Online Courses [page 45]
Creating Instructor-Led with Online Content Courses [page 74]
Importing Content to Add to an Existing Learning Item [page 770]
Importing New Online Course Content [page 775]
Importing Updated Content for an Existing Learning Item [page 772]
Importing Content to Enable it for Mobile or Offline Use in an Existing Learning Item [page 774]

5.5 Adaptive Online Course Types

You can create adaptive courses that give users a pretest and hide content if users pass the objective questions or you can create adaptive courses that give users a post-test and tell users to review content for objectives that they failed.

Adaptive online courses work by using objectives as a bridge between questions and content. Users can pass or fail objectives, and based on the content objects that are associated with the objectives, they pass or fail the content object. Adaptive courses use two different types of exams: pretests and post-tests.

Adaptive exams rely on flags, which are set during exam analysis. During the exam, users answer questions that are associated with an objective. If they correctly answer enough questions from the objective to receive a passing grade, then they receive a flag for the objective. When a user has a flag for all objectives in a content object (or package, or item), users can:

- Skip content objects (in the case of a pretest).
- Avoid reviewing content objects (in the case of a post-test).

Users aren't **forced** to skip or review content. Instead, if they fail an objective, they receive a *Needs Review* flag on the associated object. When they look at the *Content Structure* page, every object that has a *Needs Review* flag contains the sentence *This content object needs to be reviewed* in the *Status* column. As a learning administrator, you can remove the flag in the *Object Details* page of users' *Completed Items*.

Pretests

Users take exams before other content to assess their existing knowledge. If users pass all the objectives associated with a content object the content object is marked complete. The learning item only presents incomplete content objects to users, so they skip content that they've already mastered in order to concentrate on what they must learn.

Post-tests

Users take exams after they complete a learning item's other content objects. The post-test assesses mastery of the content object's learning objectives. When users fail one or more objectives associated with a content object, the content object is no longer marked complete. Users must review the incomplete content (content that they haven't mastered).

5.6 Creating Other Items

You create an item with a classification of *Other* when you need to track something that isn't an online course and doesn't have time scheduled with an instructor. This classification is typically used for physical items, like a book, or for task checklists, which are tests to observe someone successfully completing a task.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Items* and choose *Add New*.
2. In *Item Classification*, select *Other*.
3. Fill out the required fields and any desired optional fields.
4. Choose *Save*.

Related Information

Learning Item Details Fields [page 148]
Learning Item Details Fields [page 148]
Creating Instructor-Led Courses [page 35]
Creating Online Courses [page 45]
Creating Instructor-Led with Online Content Courses [page 74]

5.6.1 Enabling a Task Checklist

A task checklist is a tool that observers use to see if learners can demonstrate what they learned in a course.

Prerequisites

Add tasks to a learning item and arrange them in a sequence.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find the learning item that should have the task checklist and then open the learning item.
3. Go to *Tasks*.
4. Click *(Task Checklist Settings)*.
5. Select *Enable Task Checklist*.
6. Complete the other settings to control the behavior of the task checklist.

   Task Checklist Settings [page 69]
7. Click *Save*.

Related Information

Adding Tasks to Courses [page 96]
Setting the Order of Tasks in a Course [page 67]
SAP SuccessFactors Learning Task Checklists [page 71]
Task Checklist Observer [page 72]
Enabling Administrators to Assign Task List Observers [page 67]
Enabling Users to Nominate Task Checklist Observers [page 68]

5.6.2 Setting the Order of Tasks in a Course

Set the order of tasks in a course so that you test learners' ability to accomplish the tasks in an order from beginning to end.

Prerequisites

Create a learning item of type other and assign tasks to it.

Procedure

1. Go to Learning Administration, and then go to *Learning Activities* > *Items*.
2. Search for and open the learning item that contains the task checklist.
3. Go to *Tasks*.
4. Drag the tasks into the correct sequence.
5. Click *Save*.

5.6.3 Enabling Administrators to Assign Task List Observers

Enable administrators to assign task list observers so that they can decide who tests users on their task checklists.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Roles*.
2. Find the role that should get the permission to assign task list observers and open the role.
3. Apply the Assign Task Observer permission to the role.

Next Steps

More complex security systems can restrict the assignment process by learning item or user. See the security handbook for help with more complex configurations.

If you want administrators to be the **only** people to select observers, then when creating the checklists, clear *User Can Request Observation*.

Related Information

Task Checklist Business Process [page 70]
SAP SuccessFactors Learning Task Checklists [page 71]
Task Checklist Observer [page 72]
Enabling a Task Checklist [page 66]
Enabling Users to Nominate Task Checklist Observers [page 68]

5.6.4 Enabling Users to Nominate Task Checklist Observers

If you want the users who are being tested by a checklist to nominate their own testers, you can allow them to do it.

Prerequisites

Create a learning item of type other and add tasks to it. Sequence the tasks in the correct order for the checklist.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Search for and open the learning item that contains the task checklist.
3. Go to *Tasks*.
4. Choose *Task Checklist Settings*.
5. Set *User Can Request Observation* to *Yes*.
6. Choose *Save*.

Related Information

Adding Tasks to Courses [page 96]
Setting the Order of Tasks in a Course [page 67]
Enabling a Task Checklist [page 66]

5.6.5 Task Checklist Settings

Use task checklist settings to control the behavior of a task checklist at run time.

You set the behavior of task checklist for the item in *Learning Activities* > *Items* > *Tasks* > ⚙ *(Task Checklist Settings)*.

Task Checklist Settings

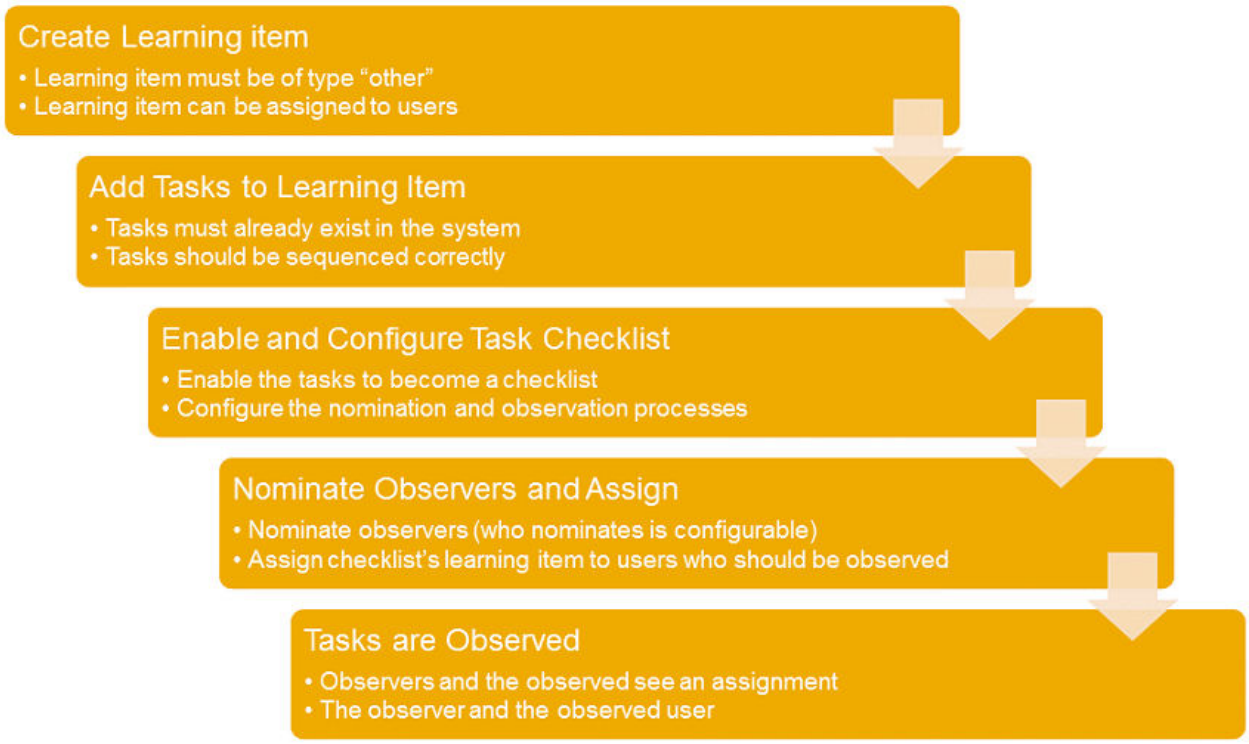
Setting	What the setting does
Enable Task Checklist	Select *Enable Task Checklist* when you've added the tasks, sequenced them, and you're ready to assign the learning item.
Enable Notes Field	If you enable the notes field, observers see a *Notes* text area in the task checklist. They can type notes about the overall work of the learner.
Enable Task Duration	If you enable the task duration, observers time each individual task and the system sums the times to find the duration of the overall checklist. For example, if the observer records one minute per task for five tasks, then the overall duration is five minutes.
User Can Request Observation	If you select this option, then users can nominate their own observers. If you clear it, then an administrator must directly assign the observer in *Manage User Learning* > *Assign Task Observers*.
Observers Must Be Authorized Instructors	If you enable the *Observers Must Be Authorized Instructors* setting, then the system forces the observer to an instructor and forces the instructor to be authorized to teach this learning item. You can see authorized instructors by going to *Instructors* in the learning item.
Observer Must Be Primary Manager	If you enable the *Observer Must Be Primary Manager* setting, then the system limits the observer list to the learner's primary manager, ensuring that the task observation request can only be sent to them. You can see the learner's primary manager in the *Employment Information* section of their user record. To apply this setting, *User Can Request Observation* must be set to *Yes*, and *Observers Must Be Authorized Instructors* must be set to *No*.

Setting	What the setting does
Threshold	The threshold is the number of tasks that an observer must mark complete before the *Record Completion* button is enabled. For example, with the threshold set to three by administrators, observers must mark at least three tasks complete before the *Record Completion* button is enabled. To enable the *Record Completion* button at all times, administrators can set the threshold to zero.
Completion Status and *Failure Status*	The completion status and failure status are required options. You must select: • A completion status that is based on the for-credit completion statuses that are associated with the item type setting of the item. • A failure status that is based on the not-for-credit completion statuses that are associated with the item type setting of the item.

5.6.6 Task Checklist Business Process

Before building a task checklist, understand how it operates from set up to completion.

Task checklists begin with an administrator creating a learning item to house the task checklist. You must create a learning item because learning items are the assignable unit of the system: they are the thing that you can put on users' *My Assignments* tile. You then create and configure the task checklist. Finally, users complete the task checklist.



Task Checklist Process

Related Information

Adding Tasks to Courses [page 96]
Setting the Order of Tasks in a Course [page 67]
Enabling a Task Checklist [page 66]
Task Checklist Settings [page 69]

5.6.7 SAP SuccessFactors Learning Task Checklists

A task checklist assesses users in an observable, usually physical skill.

A task checklist is a tool that an observer uses to watch a learner demonstrate mastery of learning objectives. For example, if a learning item teaches users about assembling a piece of equipment, the task checklist might ask an observer to watch the user assemble the equipment and also ask the observer to check key tasks within the assembly. One task within the larger assembly task might be "Learner puts on safety glasses before approaching the work area" or "Learner uses torque wrench to properly tighten screws."

Each checklist is composed of a number of tasks. You define the tasks that users must be able to complete, in order, to successfully complete the checklist. The order of the tasks is important. For example, for a task checklist about assembling equipment, you might want safety equipment tasks at the beginning and workspace cleanup tasks at the end.

5.6.8 Task Checklist Observer

A task checklist observer watches users to make sure that they successfully complete a series of tasks to prove that they absorbed what they learned in a course.

A task checklist observer watches a learner go through a series of tasks. For example, if the task checklist is the set of tasks that must happen to change the spark plugs in an engine, the observer watches the learner do each task: disconnect the battery, disconnect the spark plugs from the spark plug wires, and so on.

The observer passes and fails the user on each task. For example, if a leaner forgets to disconnect the battery or does it incorrectly, the observer can fail the learner on that task. The observer can also add comments about each task.

Observers know that they have an observation because the observation appears in their learning assignments. They are also notified in email that they have an observation.

Users become observers through a nomination process. Most likely, observers are selected by administrators, but in some cases, they can be nominated by the employees undergoing observation.

5.6.9 Rules for Modifying Assigned Task Checklists

This table describes what happens if you modify a task checklist after it has been enabled and then assigned to one or more users.

If an administrator...	...The system reacts as follows
Adds or removes tasks and saves changes OR Reorders the list of tasks and saves changes	• If the user has no outstanding observation requests, then the system sends the new, modified task checklist when a user sends an observation request. • If the user has outstanding observation requests, then the system uses the old task checklist. Therefore, if the user modifies the observation request by adding additional potential observers, then the system uses the old task checklist. • If the user has outstanding observation requests, withdraws all of the requests, resubmits new requests, then the system sends the new, modified task checklist. **Note** Tasks assigned to an item are displayed to users on the item's task checklist, even if the task is inactive. To remove an inactive task from a task checklist, an administrator needs to manually remove the task from the item or inactivate the item. When adding a task to the task checklist, the list only shows active tasks by default. An administrator can choose an inactive task by modifying the search results.

If an administrator...	...The system reacts as follows
Removes all tasks and saves changes	• The system clears the *Enable Task Checklist* check box because you must have one or more tasks associated with an item to use the task checklist. • The system removes any observation requests related to this item from the To-do list of nominated users. • The system removes any task checklist-based actions a user can take for this item.
Clears the *Enable Task Checklist* check box and saves changes	• If there are pending history records for the item (for example, a user submitted an observation of another user, but the item is pending an e-signature or survey), then the system allows the task checklist to complete without interruption. However, if the history record is **not completed** or the history record reappears on the To-do list (for example, the item is a period-based item assignment), then the system treats this "new" item as if it had no pending history records. • If there are pending history records for the item. • The system removes any task checklist-based actions a user can take for this item. • If the user has outstanding observation requests, then the system removes any observation requests related to this item from the assignments list of nominated users.

5.6.10 The Process of Selecting Observers and Completing Observations

When you assign a task checklist learning item to users, and when you nominate (or allow users to nominate), the users interact with the task checklists according to your configured business process.

The exact task checklist process depends on your configuration, but after you create the task checklist, the two primary steps are to select observers, and then to complete the observations.

Select Observers

A task list observer watches the learner do the tasks and then also marks the user complete or incomplete on each task. The first step in any task checklist process identifies the observer. The identification process is called nomination when users are allowed to select their own observers or assignment when administrators directly assign the observer.

- If you selected *User Can Request Observation*, then the user being observed can nominate observers. The users being observed see a nomination assignment. They use the item details page to make the nomination.
- If you cleared *User Can Request Observation*, then administrators must directly assign the observers. You go to *Manage User Learning* > *Assign Task Observers* to assign them. In the item details page, users can view the observers but they cannot nominate.

After observer selection, the system creates a learning assignment for the observer. The assignment indicates the observer should provide an observation. The observer's due date for watching the tasks and completing the task list is the same due date as the user who performs the tasks.

Complete Observation

The user and observer coordinate a time and place for the observation. They coordinate outside the application (for example, the two could coordinate over the phone, email, or instant message). When they meet and are ready to begin, the observer launches the task checklist from his or her *My Assignments* tile.

During the observation, the observer can use a mobile device (for example, laptop computer, smart phone, or other device) to record success/failure and comments for each task. Although we recommend that the observer use a mobile device, it's not required. The observer could take a screen shot of the task checklist, print it, document the observation using the paper, and then return to a desktop computer and record the observation in the system.

At the end of the observation, when the observer clicks Record Completion or Record Failure, the system records the item with the completion or failure status that the administrator has identified when enabling the task checklist for the item.

When the system records a completion status for the item, it removes the item from the assignments of any other users who might have been identified as an observer, and the system places that item in the history for the user. Although a user can identify multiple people to be observers, the system allows only one observer to submit the observation of the tasks and record completion or failure for the learning item. When the system records a failure status for the item, it keeps the item on the assignments list of any other users who might have been identified as an observer so that the user and observers can repeat the task checklist process.

Related Information

SAP SuccessFactors Learning Task Checklists [page 71]
Task Checklist Observer [page 72]
Task Checklist Settings [page 69]

5.7 Creating Instructor-Led with Online Content Courses

Create instructor-led with online content courses when a portion of the course is instructor-led and live, but another portion is online and on demand.

Prerequisites

Create and define an instructor-led with online content item type in *References* > *Learning Activities* > *Item Types*.

Context

You often want a single course to include both online and instructor-led content. For example, you might want your users to launch some online learning on the first day of training and then meet with an instructor on the second day. In this case, you can create an instructor-led with online content item: the first day is online and the second day is scheduled with an instructor. The instructor-led portion can be in a classroom or virtual.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*
2. Choose *Add New*.
3. For *Item Classification*, select *Instructor-led with online content*.
4. Select the default language of the course in *Locale*.

   This is useful if, for example, you're an English speaking administrator but you're setting up courses for a German audience. The values you insert are plugged into the German locale under the localization button (). If you later click that button in, for example, the course title, you see what you type now in the German row.
5. For *Item Type*, select the instructor-led with online content course item type that you created.
6. In *Item ID*, enter a unique value that can be used to search for the item in the user interface.
7. Complete the remaining required information for the item and then choose *Save*.

   You can change information later for all fields except for *Item Type* and *Item ID*.

   The learning item page opens.
8. Go to the *Online Content* tab and add content that the users can take online.
9. Go to the *Agenda Template* tab and add time slots for the instructor-led portions of the class.

Related Information

Learning Item Details Fields [page 148]
Adding Online Content to Courses [page 63]
Adding Content Packages to a Learning Items [page 52]
Adding Online Content Objects to Learning Items [page 53]
Adding Assessments to Learning Items [page 54]
Organizing Online Learning Content for a Learning Item [page 55]
Creating an Adaptive Online Course [page 57]

5.8 Adding Attributes to Items Manually

Add attribute types of competency and skill to any item classification so that learners can build a portfolio of attributes after completing the course.

Prerequisites

- For users who have enabled Talent Intelligence Hub, ensure you've migrated attributes.
- For users who have enabled Job Profile Builder, ensure you've imported competencies from Job Profile Builder.
- For users who have enabled Job Description Manager, ensure you've imported competencies from Job Description Manager.

Context

You can add attributes to instructor-led, online, instructor-led with online content, and other item classifications.

You can also run *Item Connector* to add attributes and ratings to multiple items.

- Job Description Manager or Job Profile Builder users can provide competency ID in the **CPTY_ID** column of the item_competency_data.txt file to map competency with an item.
- Talent Intelligence Hub users can provide attribute ID in the **CPTY_ID** column of the item_competency_data.txt file to map attributes with an item. You can also use the connector to update ratings associated with an attribute.

→ Remember

- If you've migrated to Talent Intelligence Hub, admins can add attributes of type competency and skill, however, for Job Description Manager and Job Profile Builder enabled users, you can find and add **only** competencies to items.

  ⓘ Note

  Linking internal and external competencies to an item allows only Job Description Manager and Job Profile Builder users to view them on the Course Home.

- If the proficiency rating scale isn't configured in Center of Capabilities, the rating receives a default five-point proficiency level scale. **This configuration applies only to customers who are migrating from Center of Capabilities**. The default proficiency level scale is configurable. However, you can't modify the default scale after you enable *Growth Portfolio* in your tenant.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Items*.
2. Search and open an item.
3. Choose the *Attributes* tab.
4. Choose  and find the attributes that you want to add.
5. Select one or more attributes, and choose *Add*.
   The attributes are added to the list. For each attribute, the lowest rating level (one) is assigned by default.
6. **Optional:** Choose the edit icon to update the default rating assignment.
7. In *Rating*, choose the rating that learners earn if they complete the course.
8. Choose *Save*.

Results

The attributes are added. You can also remove associated attributes from the item, if necessary.

Related Information

Scheduling Attributes Synchronization Process [page 1261]
Scheduling Capabilities Synchronization Process [page 1261]
Migration of Learning Competencies to Center of Capabilities [page 1356]

5.9 Premium AI Features in SAP SuccessFactors Learning

5.9.1 AI-Assisted Course Generation in Learning

The *Assisted Course Generation* feature in Learning Administration provides administrators with a streamlined way to create learning courses and task checklists.

When creating a new learning item, administrators can use the *Generate with AI Assistance* option to generate course details, task checklists, or both based on the description and source materials they provide. The AI-generated draft can then be reviewed, refined, and saved as part of the item creation process.

By reducing the time and effort required to build learning content, AI-assisted course generation helps improve consistency across courses and task assignments. Administrators can quickly develop structured learning experiences, while learners benefit from clear course information and actionable task checklists that support successful completion.

Related Information

Base AI Features in SAP SuccessFactors

5.9.1.1 Enabling AI-Assisted Course Generation

Enable the *Assisted Course Generation* feature in SAP SuccessFactors Learning Administration to generate course details and task checklists with AI assistance.

Prerequisites

You have the *Administrator* > *Manage AI Capabilities* > *AI Services Administration* permission.

Procedure

1. As an administrator, navigate to *Admin Center* > *AI Services Administration*.
2. In the *Learning* section, select the *Assisted Course Generation* option.

Next Steps

When creating a new learning item, administrators can use the *Add New* > *Generate with AI Assistance* option to generate course details and task checklists.

Related Information

Generating Courses Using AI Assistance [page 79]

5.9.1.2 Generating Courses Using AI Assistance

Use the *Assisted Course Generation* feature in SAP SuccessFactors Learning Administration to efficiently create course details and task checklists with AI assistance.

Prerequisites

- You've enabled *Assisted Course Generation*: Enabling AI-Assisted Course Generation [page 78]
- You have the *Administrator* > *Manage AI Capabilities* > *AI Services Administration* permission.
- In Learning Administration, you have the *Learning Activities* > *Add Item*, *Edit Item*, and *View Item* permissions in your role.
- For image upload, you've set `showItemThumbnailPhotosGlobally` to `true` in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*.
- For the *Generate Image* widget, you've enabled *Assisted Image Generation*: Enabling AI-Assisted Image Generation [page 80]
- The *Course Details* section always includes the *Title*, *Description*, *Goals*, *Duration*, and *Audience* fields. Any additional fields are displayed based on what is configured to appear in *Learning Activities* > *Items* > *Item Details* (tab) > *Course Overview*. Note that rich text formatting and field-level localization are not currently supported for *AI-Assisted Course Generation*.

Procedure

1. As an administrator, navigate to SAP SuccessFactors Learning Administration and go to *Learning Activities* > *Items* in SAP SuccessFactors Learning Administration.
2. From the *Add New* dropdown, select *Generate with AI Assistance*.
   The *Assisted Course Generation* page opens.
3. Choose an *Item Classification* from the dropdown menu.
4. Choose the *Components* you'd like to generate. Based on your selected item classification, the options include *Course Details*, *Task Checklist*, or both.
5. In the *Describe the Course* field, enter a prompt up to 500 characters with details for the course or task checklist. For example, you might include the course outline, desired length, objectives and goals, and target audience.
6. **Optional Step** (Recommended): In the *Source Materials* field, upload a PDF file (up to 50 pages and 10 MB) to supplement the prompt and improve the output.
7. When you're ready, choose *Generate*.
   The system uses AI to analyze your input and generates the output on a new page.
8. On the Course Preview page, verify the details in each section. Complete any required fields and make any desired revisions. You can also discard the draft and regenerate it as needed.
9. When you're done, choose *Save*.
   The system takes you to the *Item Details* page.

5.9.2 AI-Assisted Image Generation in Learning

The AI-assisted image generation tool is an interactive widget that uses generative AI capabilities to assist administrators with images for learning content in Learning Administration.

The AI-assisted image generation feature in Learning Administration offers administrators a streamlined method to create engaging content without the need for external image sourcing. The *Generate Image* option is available when creating or editing custom cards and banners, and when modifying existing items, programs, and curricula. Administrators enter a description and generate an image that can be applied directly to the learning content.

Related Information

Base AI Features in SAP SuccessFactors

5.9.2.1 Enabling AI-Assisted Image Generation

Enable the AI-assisted image generation feature in SAP SuccessFactors Learning so administrators can generate images for learning content.

Prerequisites

- You've purchased the *AI units* license. For more information about *AI units* license, please contact your Account Executive.
- You have the *Administrator* > *Manage AI Capabilities* > *AI Services Administration* permission.

Procedure

1. As an administrator, navigate to *Admin Center* > *AI Services Administration*.
2. In the *Learning* section, select the **Assisted Image Generation** option.

Next Steps

Administrators can now use AI to generate images for custom cards, banners, items, programs, and curricula in Learning Administration.

5.9.2.2 Generating Images for Custom Cards and Banners

Use the AI-assisted image generation tool when creating or editing custom cards and banners in Learning Administration.

Prerequisites

- You've purchased the *AI Units* license. For more information about *AI Units* license, please contact your Account Executive.
- You've enabled *Assisted Image Generation*: Enabling AI-Assisted Image Generation [page 80]
- You have the *Manage Custom Experience* permission in *System Administration* > *Security* > *Role Management*.

Procedure

1. As an administrator, navigate to Learning Administration and create or open the custom card or banner for which you want to generate an image.
2. On the page where images are uploaded, choose the *Generate Image using AI* option.
3. Select *Generate Image*.
   The *Generate Image* widget open.
4. Enter up to 180 characters to describe the image, then choose *Generate*.

   The time it takes to display an image preview depends on the complexity of the image description. It can take as little as 15 seconds or extend beyond two minutes.
5. **Optional step:** If you want to generate a different image, you can modify the description as needed and repeat step 4.
6. Use the *Zoom In* and *Zoom Out* icons to adjust the image size as needed. You can also click and drag the image within the preview area to position it.
7. If desired, you can download the image for future use.
8. Once you're satisfied with the image, choose *Apply* to add it to the custom card or banner.
9. At the bottom of the page, choose *Next* to complete the workflow, then choose *Save* to apply your changes.

5.9.2.3 Generating Images for Learning Activities

Use the AI-assisted image generation tool when modifying existing items, programs, or curricula in Learning Administration.

Prerequisites

- You've purchased the *AI Units* license. For more information about *AI Units* license, please contact your Account Executive.
- You've enabled *Assisted Image Generation*: Enabling AI-Assisted Image Generation [page 80]

Procedure

1. As an administrator, navigate to Learning Administration, then open the existing item, program, or curriculum for which you want to generate an image.
2. Locate the *Images* field, then select *Generate Image*.

   For items and curricula, the *Images* field can be found on the *Details* tab. For programs, choose the *Edit* icon in the *Settings* window.

   The *Generate Image* widget open.
3. Enter up to 180 characters to describe the image, then choose *Generate*.

   The time it takes to display an image preview depends on the complexity of the image description. It can take as little as 15 seconds or extend beyond two minutes.

   A preview of the generated image is displayed.
4. **Optional step:** If you want to generate a different image, you can modify the description as needed and repeat step 4.
5. Use the *Zoom In* and *Zoom Out* icons to adjust the image size as needed. You can also click and drag the image within the preview area to position it.
6. If desired, you can download the image for future use.
7. Once you're satisfied with the image, choose *Apply* to add it to the content.
8. To apply your changes, choose *Save* (for items or curricula) or *Done* (for programs).

5.9.3 AI-Assisted Writing in Learning

The AI-assisted writing tool is an interactive tool that uses generative AI capabilities to assist employees with their writing tasks. While writing content in the SAP SuccessFactors applications, employees can leverage the features of the AI-assisted writing tool to enhance multiple aspects of their writing, such as clarity, conciseness, and tone.

In Learning, the tool is used to improve the Title and Description fields when creating Items, Curricula, Programs, Collections and QuickGuides.

> **Note**
>
> The AI-assisted writing tool isn't yet supported in the Item and Curricula translation widgets.

The following is a summary of the capabilities offered by the AI-assisted writing tool:

- Uses language processing capabilities to understand the context of a sentence and suggest enhancements in grammar, spelling, vocabulary choices, and phrasing.
- Ensures improved readability and a consistent tone (professional, personable, or constructive) to suit the communication needs for different audience groups in the organization.
- Provides the options to communicate a message in fewer or more words and transform paragraphs to bulleted lists.
- Provides additional actions in the context of the tasks that users perform in their SAP SuccessFactors applications.

The following table outlines the available actions in the AI-assisted writing tool.

Action	Description
Enhance Writing	Suggests enhancements in grammar, spelling, vocabulary choices, and phrasing in the context of the selected line or paragraph.
Change Tone	Provides options to change the tone of the selected line or paragraph to professional, personable, or constructive to suit the communication needs for different audience groups in the organization.
Make Shorter	Shortens a selected line or paragraph to convey the message more concisely.
Make Longer	Rewrites a selected line or paragraph by adding more words to provide a detailed explanation based on the original content.
Make Bulleted List	Converts a selected line or paragraph into a bulleted list to simplify complex information, and enhance readability by breaking it down into easy-to-read points.
Analyze Text	Performs a safety scan on each text box, prompt entry, or Generative AI output in order to detect bias, and suggest replacement text for any language flagged as potentially biased, discriminatory, or harmful.
Translate	Translates the written text into the target language chosen by the user. The following capabilities are supported with this action: • Translation from en-US (US English) to all 46 languages supported in SAP SuccessFactors. • Full translation between the following languages: English (US), German, French, Spanish, Portuguese, Chinese (Simplified) and Japanese.

> **Note**
>
> For information about the languages supported by the AI-assisted writing tool, refer to SAP Note 3396784.

Related Information

Enabling AI-Assisted Writing [page 84]

5.9.3.1 Enabling AI-Assisted Writing

Enable AI-assisted writing, including *Translation* and *Text Analyzer* features in SAP SuccessFactors applications to help users enhance the quality of their writing.

Prerequisites

- You've purchased the AI units license. For more information about AI units license, please contact your Account Executive.
- You have the *Administrator* > *Manage AI Capabilities* > *AI Services Administration* permission.
- Users have the *User Permissions* > *AI Access* > *Assisted Writing* permission.

Procedure

1. Go to *Admin Center* > *AI Services Administration*.
2. In *Global Features*, enable the *Assisted Writing* switch.

   Allows users to access the *Enhance Writing*, *Change Tone*, *Make Shorter*, *Make Longer*, and *Make Bulleted List* actions, and other module-specific actions (if applicable) in the assisted writing menu.
3. Under *Assisted Writing*, you can enable additional switches as needed.

   Ensure that the *Assisted Writing* switch is enabled before proceeding.
   a. Choose the *Translation* switch.

      Allows users to access the *Translate* action in the assisted writing menu to convert their content into a target language.
   b. Choose the *Text Analyzer* switch.

      Allows users to access the *Analyze Text* option in the assisted writing menu to review their text for bias, discriminatory, or harmful language.

> **Note**
>
> The *Translate* and *Analyze Text* options appear in the assisted writing menu only when their respective toggles are enabled.

Next Steps

Users can view the AI-assisted writing tool icon when they navigate to the text input area and use the options in the assisted writing menu to enhance their writing.

Related Information

Accessing the AI Services Administration Page

5.9.4 Enabling AI-Assisted Skills and Skill Ratings for Learning

Levering generative AI capabilities, you can infer skills, and ratings for the inferred skills from titles and descriptions of items and programs.

Prerequisites

- You've purchased the **AI units** license. For more information about **AI units** license, please contact your Account Executive.
- Ensure the integration between Learning and SAP SuccessFactors Platform is sealed.
- Ensure that you've upgraded to Talent Intelligence Hub and the integration between Learning and Talent Intelligence Hub is completed.
- Ensure that you have your SAP SuccessFactors Platform and Learning available within the same tenant, except if you're in DC68-DC70 setup.
- You have the *Administrator* > *Manage AI Capabilities* > *AI Services Administration* permission.

Procedure

1. Go to *Admin Center* > *AI Services Administration*.
2. In the *Learning* section, enable the *Assisted Skills Inference for Learning* option.
   Enabling the option infers skills for items and programs.
3. Enable *Assisted Ratings for Inferred Skills*.

   > **Note**
   >
   > To enable the option, the *Assisted Skills Inference for Learning* must be enabled before you can enable the option.

   Enabling the option extracts ratings for the inferred skills.

Next Steps

You can create inference requests on the *Assisted Skills Inference* page to infer skills and skills ratings for items and progrms. You can then review and associate them with learning items and programs.

Related Information

Creating Skills Inference Requests for Items and Programs [page 86]

5.9.5 Creating Skills Inference Requests for Items and Programs

You can create skills inference requests for items and programs to infer skills and ratings from their titles and descriptions using AI.

Prerequisites

- You've purchased the *AI units* license. For more information about the *AI units* license, please contact your Account Executive.
- You've enabled the *Assisted Skills Inference* option on the *AI Services Administration* page.
- You have the *AI-Assisted Skills Inference* permission to access the *Assisted Skills Inference* page.
- Ensure that you have your SAP SuccessFactors Platform and Learning available within the same tenant, except if you're in a DC68-DC70 setup.
- Ensure that your learning items and programs include a title and description to appear in the *Items > Search* and *Programs > Search* selector. Entries without both fields are excluded from search results.

Important Consideration

The *Assisted Skills Inference* feature can suggest skills that aren't yet available in your organization's Attributes Library. This is expected behavior, allowing AI to recommend relevant skills that aren't already included in the library. These are only suggestions—they aren't associated automatically to learning items and programs. A Talent Intelligence Hub administrator must review and approve each suggested skill before it can be used. Existing approved skills remain unchanged until a suggested skill is explicitly approved.

Best Practice

- Maintain clear and well-defined titles and descriptions for items and programs to ensure accurate inference results.
- Run the skills standardization job before using the AI-assisted skill inference feature. For details on skills standardization, see Enabling the AI-Assisted Skills Standardization Setting.

Procedure

1. Go to *System Administration* > *System Management Tools* > *Assisted Skills Inference*.
2. Choose *Create Request*.
3. Choose one of the following options based on your requirements.

   The procedure remains the same for both items and programs.

Content Type	Description
For Items	Choose the option if you want to create skills inference requests for learning items.
For Programs	Choose the option if you want to create skills inference requests for learning programs.

4. Enter a unique *Request Name*.
5. Choose *Add* to include learning entries for which you want to infer skills.
   The *Search* selector opens.
6. You can select additional filters as needed in the search selector and choose *Search*.
7. Select the entries and choose *Add*.

   You can add up to 500 entries for a request.
8. Choose *Save and Infer*.

Results

When a request is created, the inference process is triggered, and the *Inference Status* is set to *In Progress*. Inferring skills and ratings for a request can take up to one hour depending on the data volume.

> **Note**
>
> After skills and ratings have been inferred for all learning entries within the request, the status is set to *Completed*. Your inference requests can't be deleted manually once created. They are retained for up to six months and deleted automatically.

Next Steps

Review the inference details when *Review Status* of the request is set to *Ready for Review*.

Related Information

Reviewing and Associating Inferred Skills and Ratings for Items and Programs [page 88]
Enabling AI-Assisted Skills and Skill Ratings for Learning [page 85]

5.9.6 Reviewing and Associating Inferred Skills and Ratings for Items and Programs

You can monitor request progress, review AI-inferred skills and ratings, and associate them with your learning items and programs on the *Assisted Skills Inference* page.

Prerequisites

- You've created skills inference requests. For more information, see the **Related Information** section.
- The *Review Status* of the request is set to *Ready for Review* status.
- You have the *AI-Assisted Skills Inference* permission to access the *Assisted Skills Inference* page.
- Ensure that you've upgraded to Talent Intelligence Hub and the integration between Learning and Talent Intelligence Hub is complete.

Recommendation

- Enable the *Assisted Ratings for Inferred Skills* option on the *AI Services Administration* page to extract ratings for inferred skills.
- Maintain clear and well-defined titles and descriptions for items and programs to ensure accurate inference results.

  > → Remember
  >
  > Assisted ratings for skills aren't extracted if learning entries include unclear titles and descriptions. In such cases, the ratings appear blank for inferred skills.

- Run the skills standardization job before using the AI-assisted skill inference feature. For details on skills standardization, see Enabling the AI-Assisted Skills Standardization Setting.

Context

Before proceeding, familiarize yourself with the possible status values for *Review Status* of requests and *Review Status* of learning entries. These values help you track the progress of each request and its learning entries throughout the review process.

List of Statuses in the Review Process

Status Value	Request Review Status	Learning Review Status
Not Ready	The inference is still pending. No learning entry within the request has completed inference.	The inference process for the learning entry hasn't yet started.

Status Value	**Request Review Status**	**Learning Review Status**
Ready for Review	At least one learning entry within the request has completed inference. You can open the request to begin reviewing the inference details.	The inference for the learning entry is complete. You can begin your review.
In Review	At least one learning entry within the request has been reviewed. The request is currently under review.	NA
Reviewed	All learning entries within the request have been reviewed.	All inferred skills have been reviewed and associated with the learning content. Note that this action can't be reverted.
Not Applicable	The inference wasn't completed for any learning entry within the request.	No skills were inferred for the learning entry. To process, ensure that the entries have clear titles and descriptions, and then submit a new request.
Deleted	NA	Inference for the learning entry failed and no skills were inferred.

Procedure

1. Go to *System Administration* > *System Management Tools* > *Assisted Skills Inference*.
2. Choose a request that's ready for your review.
   The *Inference Details* page appears, displaying the number of inferences completed and failed for the request.
3. In the table, review the list of entries and open the entry that's *Ready for Review*.
   The skills review page appears, displaying the total number of inferred skills, inferred skills pending confirmation from the Attributes Library, and other metadata for the request.
4. Choose *Edit*.
5. In the *Inferred Skills* section, you can review the AI-inferred skills, their descriptions, and the associated ratings for the learning.

   > ⓘ Note
   >
   > Inferred skills with a warning in the section indicate that the skill is currently marked as "Inferred" in the Attributes Library. When you choose to associate it, the skill will be automatically linked after its status is updated to "Confirmed" in Talent Intelligence Hub.

6. When the *Skills Association* toggle is on (default), inferred skills are associated with the learning. Disable the toggle to exclude a skill from association.
7. In the *Ratings* dropdown, review and adjust the rating as required.

   > → Remember
   >
   > Assisted ratings for skills aren't extracted and the *Rating* dropdown appears blank in the following scenarios:
   >
   > - The learning entry has an unclear or insufficient title and description.

- The "Assisted skills rating for inferred skills" feature isn't enabled. For more information about enabling it, see the *Related Information* section.

8. **Optional:** If you want to manually add a skill to the learning that's not inferred by the AI, select the *Manually Added Skills* tab, and follow the steps:
   a. Choose *Add*.
      The *Attributes > Search* selector appears.
   b. You can select additional filters as needed in the search selector and choose *Search*.
   c. Review and select the attributes that you want to add.
   d. Choose *Add*.

      You can manually associate up to 20 skills with a learning.

      The skills have now been added to the section.
   e. **Required:** In the *Rating* dropdown, choose a rating for each skill.
   f. To remove a skill from the list, select the skills and choose *Remove*.
9. Choose *Finish* > *OK*.
   The skills and ratings are associated with the learning and the learning entry is set to *Reviewed*. Remember, once skills are reviewed and associated with the learning, the changes can't be reverted on the *Assisted Skills Inference* page.
10. Repeat the review procedure for all the learning entries that are ready for review within the request.

Results

The skills are associated with the corresponding learning items or programs. Once all learning entries in the request have been reviewed, the *Review Status* of the request is set to *Reviewed*.

Next Steps

You can review and adjust the associated skills and ratings in the *Attributes* section of the *Items* and *Programs* pages.

Related Information

Enabling AI-Assisted Skills and Skill Ratings for Learning [page 85]
Creating Skills Inference Requests for Items and Programs [page 86]

5.9.7 Enabling Automatic Review and Association of AI-Inferred Skills and Ratings to Learning

You can automate the review and association of AI-inferred skills and ratings for a large catalog of learning items and programs, without requiring manual review.

Prerequisites

- You've enabled the following settings in the *Learning* section from *Admin Center* > *AI Services Administration*
  - *Assisted Skills Inference for Learning*
  - *Assisted Ratings for Inferred Skills*
- You have the *Edit System Configuration* and *View System Configuration* permissions to access the *System Configuration* page.
- You have the *Administrator* > *Manage AI Capabilities* > *AI Services Administration* permission.

Procedure

1. Go to *System Administration* > *Configuration* > *System Configuration*.
2. In the *Configuration ID* list, search and edit *LMS_ADMIN* configuration ID.
3. Go to `enableSkillsInferenceReview` property, and set the value to **`false`**.

   By default, the property is set to **`true`**, which retains the existing inference process that requires administrator review of the inferred skills and ratings.
4. Choose *Apply Changes*.

Results

Auto review is enabled and is applied to new inference requests created after the property is set to **`false`**. Existing inference requests on the *Assisted Skills Inference* page aren't affected.

Next Steps

Create skills inference requests for items and programs. For more information, see Creating Skills Inference Requests for Items and Programs [page 86]

5.9.7.1 Auto Review and Association of Inferred Skills and Ratings to Learning

The AI-inferred skills and ratings are reviewed and associated with learning items and programs automatically on the *Assisted Skills Inference* page.

Prerequisites

- You have set the `enableSkillsInferenceReview` configuration to **`false`**.
- You've created inference requests for items and programs.
- You have the *AI-Assisted Skills Inference* permission to access the *Assisted Skills Inference* page.
- Ensure that you've upgraded to Talent Intelligence Hub and the integration between Learning and Talent Intelligence Hub is complete.

Recommendation

- Enable the *Assisted Ratings for Inferred Skills* option on the *AI Services Administration* page to extract ratings for inferred skills.

  > → Remember
  >
  > For inference requests with automated review, ratings may be inaccurate if this option is disabled because it defaults them to the lowest proficiency level.

- Maintain clear and well-defined titles and descriptions for items and programs to ensure accurate inference results.

  > → Remember
  >
  > Assisted ratings for skills aren't extracted if learning entries include unclear titles and descriptions. In such cases, the ratings appear blank for inferred skills.

- Run the skills standardization job before using the AI-assisted skill inference feature. For details on skills standardization, see Enabling the AI-Assisted Skills Standardization Setting.

Context

Before proceeding, familiarize yourself with the possible status values for *Review Status* of requests and *Review Status* of learning entries. These values help you track the progress of each request and its learning entries throughout the review process.

List of Statuses in the Review Process

Status Value	**Request Review Status**	**Learning Review Status**
Auto Reviewing	At least one learning entry in the request has completed the inference, and automatic review is in progress.	NA
Auto Reviewed	Inference is complete for all learning entries in the request. All entries are reviewed and the inferred skills and ratings are associated with learning.	The inference is complete for the learning entry. The inferred skills are auto reviewed and associated with learning.
Not Ready	NA	The inference process for the learning entry hasn't yet started.

Procedure

1. Go to *System Administration* > *System Management Tools* > *Assisted Skills Inference*.
2. Choose a request in the *Auto Reviewed* status.
   The *Inference Details* page appears, displaying the number of inferences completed and failed for the request.
3. In the table, review the list of entries and open the entry that's *Auto Reviewed*.
   The skills review page appears, displaying the total number of inferred skills, inferred skills pending confirmation from the Attributes Library, and other metadata for the request.
4. In the *Inferred Skills* section, you can view the AI-inferred skills, their descriptions, and the associated ratings for the learning.

   > **Note**
   >
   > - Inference requests with automated review process can't be modified.
   > - Inferred skills with a warning in the section indicate that the skill is currently marked as "Inferred" in the Attributes Library. The skill will be automatically linked after its status is updated to "Confirmed" in Talent Intelligence Hub.
   > - You can't manually add skills from the Attributes Library to the learning items and programs on the *Assisted Skills Inference* page. However, you can add them from *Learning Activities* > *Items* > *Attributes*.

5. The *Skills Association* value is automatically set to *Yes*, and all the inferred skills are automatically associated with the learning.
6. Repeat the review procedure for all the learning entries that are auto reviewed within the request.

Related Information

Enabling Automatic Review and Association of AI-Inferred Skills and Ratings to Learning [page 91]
Creating Skills Inference Requests for Items and Programs [page 86]
Enabling AI-Assisted Skills and Skill Ratings for Learning [page 85]

5.10 Why add Competencies, Objectives, and Tasks to Courses

When you create courses, you can add instructional design elements like competencies, objectives, and tasks. Before you add them, understand their purpose and effects.

Instructional designers often think about the competencies that their courses help learners achieve, the tasks they teach, and the learning objectives they reach. While these instructional design elements have purpose when you think through the course content, they also have a unique purpose and effects in SAP SuccessFactors Learning.

Competencies

You create competencies in Job Profile Builder to describe what a successful employee in that job should be able to do. For example, managers need a high communication competency level. After you import the competencies to Learning, you can assign the competencies to courses. When you assign competencies to courses, learners know what competencies the courses address and what rating they should expect if they complete the courses successfully. For example, if a manager completes a communication course successfully, the manager's competency rating can move to a four on a five point scale. When you run the learning event recorder, you have the option to adjust the learners' competency ratings.

Objectives

Some companies have a formal learning design structure. They add learning objectives to SAP SuccessFactors Learning to create a set of measurable learning outcomes. With objectives as measurable learning outcomes, these companies can create more sophisticated learning experiences like pre-tests and post-tests or question pooling in exams. If your company is using objectives, you can add them to the course to declare that the measurable learning outcomes of this course.

Tasks

Add tasks to courses to specify the tasks that a user should be able to accomplish after successfully completing the course. You can add tasks to help instructional designers see what learners should be able to **do** when they complete the course. For example, learners should be able to perform the tasks to enter and exit a clean room. You can take tasks a step further: the tasks can generate a task checklist. Observers watch participants and verify that they can complete the tasks. For verification, the observers use a task checklist.

5.10.1 Adding Objectives to Courses

Add objectives to courses to set the learning objectives that the course addresses.

Prerequisites

Create the objectives in *Content* > *Objectives*.

Context

Some companies have a formal learning design structure. They add learning objectives to SAP SuccessFactors Learning to create a set of measurable learning outcomes. With objectives as measurable learning outcomes, these companies can create more sophisticated learning experiences like pre-tests and post-tests or question pooling in exams. If your company is using objectives, you can add them to the course to declare that the measurable learning outcomes of this course.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to add objectives to.
3. Go to *Objectives*.
4. Click *add one or more from list* to look up and add the objective to the course.

Next Steps

If you want to delete an objective that you've added, click its *Remove* box and then click *Apply Changes*.

You often add objectives to courses so that you can create pretests and post-tests in the course's *Surveys*.

Related Information

Inherited Learning Item Objectives [page 97]

5.10.2 Adding Tasks to Courses

Add tasks to courses to specify the tasks that a user should be able to accomplish after successfully completing the course.

Prerequisites

Create a course of type **other** and create a set of tasks.

Context

Add tasks to courses to specify the tasks that a user should be able to accomplish after successfully completing the course. You can add tasks to help instructional designers see what learners should be able to **do** when they complete the course. For example, learners should be able to perform the tasks to enter and exit a clean room. You can take tasks a step further: the tasks can generate a task checklist. Observers watch participants and verify that they can complete the tasks. For verification, the observers use a task checklist.

> **Note**
>
> Tasks assigned to an item are displayed to users on the item's task checklist, even if the task is inactive. To remove an inactive task from a task checklist, an administrator needs to manually remove the task from the item or inactivate the item.
>
> When adding a task to the task checklist, the list only shows active tasks by default. An administrator can choose an inactive task by modifying the search results.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find the course that should have the tasks associated to it and then open the course.
3. Go to *Tasks*.
4. Choose the add button .
5. In *Keywords*, enter some keywords to help you search for the tasks that you want to add, and then choose *Search*.
6. Select the tasks and then choose *Add*.

Next Steps

Arrange the tasks to create a sequence and create a task checklist.

5.10.3 Inherited Learning Item Objectives

You can add objectives to learning items (courses), but learning items can also inherit objectives from their online content.

When you go to *Learning Activities* > *Items*, open a learning item, and then go to *Objectives*, you can see *Inheritied Objectives*. These are objectives that belong to content that you added to the learning item. For example, if you added a content object to the learning item in *Online Content*, and if that content object has an objective, then the learning item inherits the objective from the content object.

5.11 Copying an Existing Course to Create a New Course

Copy a course to use it as a template for a new course you want to create.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Items*.
2. Search for the course that you want to copy (use as a basis for your new one), and then open it.
3. Go to *Actions* and choose *Copy*.
4. Follow the steps of the wizard to copy the course.

   When you copy an existing course, the system requires that you enter a new item type and ID because you're creating a new instance of the existing item. In the *New Item ID* field, we recommend that you enter a descriptive name so that administrators can easily identify the item. Don't use the'|'(Pipe) character while giving a name to the New Item ID

   When you clear all checkboxes and choose *Copy*, the system copies summary data. Not all summary data copies, however. For example, thumbnail images don't copy.

Option	Description
Copy Authorized to Instruct Data	Copies authorized instructors from the *Instructors* tab to the new course.
Copy Substitutes Data	Copies substitute items from the *Substitutes* tab to the new course. **Note** The *New Item Type ID* must match the *Old Item Type ID* in order to copy substitutes data.
Copy Related Competency Data	Copies competencies from the *Competencies* tab to the new course.
Copy Related Document Link Data	Copies document links from the *Document Links* tab to the new course.

Option	Description
Copy Related Task Data	Copies tasks from the *Tasks* tab to the new course.
Copy Prerequisite Data	Copies prerequisite items from the *Prerequisites* tab to the new course.
Copy Request Data	Copies requests from the *Requests* tab to the new course.
Copy Online Settings	Copies online settings from the *Online Settings* tab to the new course. **Note** The *New Item Type ID* must match the *Old Item Type ID* in order to copy online settings.
Copy Instructor Costs	Copies the pricing information from the *Pricing* tab to the new course.
Add the new item to the library	Automatically adds the new course to the libraries that you selected on the *Libraries* tab.

Next Steps

Edit the course's data to adjust it from the information you copied to the information you need (in the new instance you just created).

5.12 Assigning Courses to Learners

Assign courses to learners with assignment profiles to assign them in bulk based on the learners' attributes.

Context

To assign courses in bulk, assign them based on a learner attribute. For example, all learners in a country/region might need the same training or all learners in a job position might need the same training. Assignment profiles allow you to match learners, through a set of rules, with the correct assignments.

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

Procedure

1. Go to Learning Administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Click *Add New* to create a new assignment profile.
3. In the new assignment profile, define the rules of the assignment profile.

   The rules create a pool of learners by learner attribute. All learners in the pool get the same assignment.
4. Go to the type of assignment that you want to add.
   - Go to *Items* to assign learning items to the learners in the pool. Learning items are stand-alone courses.
   - Go to *Curricula* to assign curricula to the learners in the pool. Curricula are groups of courses that learners must retrain on. You typically use them if your learners must qualify in a subject.
   - Go to *Programs* to assign learning programs to learners in the pool. Learning programs are groups of courses that don't count for qualification.
5. Click + (*Add Items*, *Add Curricula*, or *Add Programs*) to add the course or courses to the learner pool.
6. Execute changes and update users and assignments for the assignment profile.

5.13 Preventing Learners from Over-Enrolling

To prevent users from enrolling in too many classes of the same course, you can set a registration interval on the course.

Context

Using a registration interval prevents learners from enrolling into duplicate classes over a time period. It prevents learners from over-enrolling. For example, if the interval is 30 days, then learners can't enroll into two classes of this course in the same 30-day period. If the course is Cardiopulmonary Resuscitation (CPR) Certification, and it's scheduled as a class every seven days, a learner who enrolls into a November 1 CPR Certification class must wait until after December 1 to enroll into another course. By forcing individual learners to enroll into courses that are 30 days apart (this example), you prevent those individuals from over-enrolling and crowding out other learners who need the course.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the course that you want to limit.
3. Set *Prevent Multiple Class Registration Interval* to the period of days during which users can't enroll in more than one class for this course.

> → Tip
>
> To prevent learners from registering for the same course again, set the registration interval to **99999**.

You can override this setting by enabling *Administrators or Managers can override the Prevent Multiple Class Registration Interval* in *System Administration* > *Application Administration* > *Registration Settings*.

Example

For example, to limit learners from registering for a particular course more than once a year, set the registration interval to 365 days.

5.14 Enabling Class Requests for Courses

Enable class requests for courses so that learners can request a new class for the course. They might request a new class when they can't find it scheduled at a time they can attend or when they try to register but can only join the waitlist because the course is popular.

Prerequisites

Enable class requests as the default setting for all new courses:

- Set class requests as the default for new courses.
- Schedule the automatic processes that run the request system:
  - Class Request Demand Met Email Notification
  - Move Users from Waitlist to Request List
  - Purge Class Requests

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Learning Activities* > *Items*.
2. Find and open the course (item) that you want to allow class requests.
3. In *Minimum Registration*, type how many requests you need before you consider creating a new class.

   If you type **4** in *Minimum Registration*, then 4 requests for this course triggers a notification to the scheduler to create a new class based on this course. It triggers the notification at 4 because the course needs at least 4 people to be registered to make a class worthwhile.
4. In *Contact*, type the email address that receives the notification to schedule a class.

The course contact is the email address of a learning scheduler for the course: someone who is responsible for maintaining the course and scheduling it into classes. For simplicity, most customers use a single email address for all courses and make the email address a common address for all schedulers. For example, a distribution list. Consider a distribution list even if you have only one scheduler so that you can change the recipients later without updating all courses. SAP SuccessFactors Learning notifies the person about issues with the course. For example, the contact receives notifications when the amount of class requests is equal to or greater than the minimum enrollment of the course so that the contact can create a new schedule.

5. In *User can Request a Class*, select *Yes*.

5.15 Recommending Courses to Pools of Learners

To recommend learning to a group of learners, you group learners in an assignment profile, and you attach the recommendations to the assignment profile.

Prerequisites

To recommend courses to pools of learners, enable recommendations.

Context

When you, as a learning administrator, recommend learning to learners, you push that learning experience onto learners' *Recommended* tile and their *Recommended for You* category in their catalogs. For learners to see a recommendation, the recommended object (collection, learning item, or program) must also be in the learners' catalogs.

You might, for example, recommend an Information Technology Basics program for managers. You can create an assignment profile to capture all managers and add the recommended program in the assignment profile's *Recommended Programs* area. You can also recommend learning items (courses) in *Recommended Items* and collections of courses in *Recommended Collections*.

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

Procedure

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

2. Click *Add New* to create a new assignment profile.
3. In the new assignment profile, define the rules of the assignment profile.

   The rules create a pool of learners by learner attribute. All learners in the pool get the same recommendations.
4. Go to the type of recommendation that you want to add.
   - Go to *Recommended Items* to recommend learning items to the learners in the pool. Learning items are stand-alone courses.
   - Go to *Recommended Collections* to recommend collections to the learners in the pool. Collections are a set of links.
   - Go to *Recommended Programs* to recommend learning programs to learners in the pool. Learning programs are groups of courses that do not count for qualification.
5. Click **Add** to add the recommendations to the learner pool.
6. Propagate the assignment profile and manually synchronize the assignment profile.

5.16 Adding Surveys to Evaluate Courses or Learners

Add surveys to gather employee feedback for completed courses and to assess long-term retention and application of these acquired skills.

Context

Surveys are a type of assessment that asks users to observe and record their experiences with training outcomes. You can assign them to participants after a course to give them an opportunity to evaluate their experiences and outcomes after they complete a course. You can also assign questionnaire surveys to (for example) a supervisor who can evaluate the employee's retention after they complete the course.

Procedure

1. Go to Learning Administration, and then go to *Content* > *Surveys*.
2. Click *Add New*.
3. Type an ID and a *Name* that helps others understand the survey in both the user interface and in reports.
4. Select *Survey Type*.
   - Select *Course Feedback* if you want to build a user satisfaction survey to hear from participants about their experience in the course. For example, you can ask about the length of breaks in the class, the quality of the instructor, and so on.
   - Select *Follow-up Survey* if you want to build a survey that asks observers to comment on changes in behavior after the learner completes a class. For example, after a course about time management, you can ask questions about whether the learners are applying their new time management skills.

> **Note**
>
> You can't edit *Survey Type* after you add the survey.

5. Add a *Description* of the survey and *Comments* to describe the survey.

   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.

6. Add the survey to a *Domain* and decide if you want to activate it.

   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.

   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.

7. Click *Add*.
8. Select *Active* if you want to start working with the survey.

5.16.1 Copying a Survey as a Template for New Surveys

Copy surveys when you already have a survey and you want to use it as template for a new survey.

Context

Clicking *Copy* is the most efficient way to create a new survey when you want to reuse information from an existing survey.

Procedure

1. Go to Learning Administration, and then go to *Content* > *Surveys*.
2. Find and open the survey that you want to use as a template.
3. Click *Copy*.
4. Add a new ID in *New Survey ID* and then click *Copy*.

Results

When you copy an existing survey, you must enter a new survey ID. This requirement is because you're creating a new instance of the existing survey, the new instance doesn't link to the existing survey. After you click *Copy*, the system automatically copies the data from the Summary, Options, and Notifications tabs to the new survey.

5.16.2 Assigning Surveys to Courses in Bulk

Assign surveys to courses in bulk when you want to assign one survey to many courses.

Prerequisites

Before you assign surveys to courses in bulk, configure the survey, add questions, and so on. It is easier to configure the survey before you bulk assign than after.

Context

> **Note**
>
> You can assign one survey to one course in *Learning* > *Items* > *Evaluations*.

Procedure

1. Go to Learning Administration, and then go to *Learning* > *Questionnaire Surveys*.
2. Find and open the survey that you want to assign to courses.
3. Go to *Item Usage*.
4. Click *Add one or more from list* to add courses to the survey.

5.16.3 Reviewing Survey Statistics

Review survey statistics to see how people are responding to a survey and who has responded.

Procedure

1. Go to *Learning Administration* > *Content* > *Surveys*.
2. Find and open the survey that you want to see.
3. Go to *Item Usage*.
4. Look in *Update the Item Usage for the Survey* to see summary statistics.

   For each course, you see the number of people assigned to the survey, the number who completed it, the number who removed it, and the percentage of assigned surveys users completed. If a survey includes rating scale questions and if each question uses the same rating scale, you the mean score of all ratings that were submitted.
5. Choose *Run Report* to see detailed statistics.

5.16.4 Modifying Survey Notifications

Modify the ad hoc notifications if you need to change the message that Learning sends to users and contacts when they're assigned a survey.

Context

> **Note**
>
> Users receive notification email messages when they're assigned survey or when the Evaluation Synchronization automatic process runs.

Procedure

1. Go to Learning Administration, and then go to *Learning Activities* > *Surveys*.
2. Find and open the survey that you want to modify.
3. Go to *Notifications*.
4. Select *Use Editor Content When Sending Email Notification*.
5. Click *Launch Editor* to edit the notification.
6. To attach a file, add it in *Attachment for Survey Notification*.

It's uncommon to add an attachment. You might, however, add instructions to follow up survey notifications so that recipients know why and how to complete the survey. You might add it as an attachment instead of in the notifications if it's an official Human Resources (HR) document, for example.

5.16.5 Building a Survey Direct Link

Build a direct link when you want to send a link that can take users directly to their completed course survey.

Context

After learners complete a course, you sometimes ask them to complete a survey about their experience. If a learner forgot to complete a survey, you can send them a direct link to the survey so that they can provide feedback.

Procedure

1. Go to Learning Administration and then go to *System Administration* > *Tools* > *Direct Link*.
2. In *Direct Link Type*, select **`Questionnaire Surveys`**.
3. Select the kind of direct link you want to create.
   - Select *URL* to copy a URL and paste it into a message (for example, an e-mail message) to users.
   - Select *Notification Tags* to paste the direct links into notification messages.
4. Click the *Display Link*.
5. Copy the link and paste it either in a direct message to the users or into a notification message.

5.16.6 Configuring Course Satisfaction Surveys

Configure course satisfaction surveys to change how they behave.

Context

> ⓘ Note
>
> Depending on the type of survey, you have different configuration options. Read this topic to configure **satisfaction** surveys: surveys that ask learners about their satisfaction with a course they complete.

Procedure

1. Go to Learning Administration, and then go to *Content* > *Surveys*.
2. Find and open the survey that you want to configure.

   > **Note**
   >
   > The survey must be a **satisfaction** survey. The options are different for **follow-up** surveys.

3. Go to *Options*.
4. Set *Anonymous Surveys* to control whether respondents are anonymous or their names are stored with responses.
   - Select *Yes* to keep surveys anonymous. Respondent names aren't stored with their responses. If you run reports to view survey data, you can't follow up with any specific respondents.
   - Select *No* store respondent names with survey responses.
5. Select *Required for Item Completion* to require learners to complete the survey before you give them a completion status for the course.

   Requiring a satisfaction survey for a completion status can delay your learners' completion of the course, so many customers decide to keep the satisfaction survey optional.
6. In *Days to Complete*, type a deadline (in days) for learners to complete the survey.

   For example, if you type **7** in *Days to Complete*, learners have seven days to complete the survey before it's overdue.

   Even if you do **not** hold back learners' completion status for incomplete satisfaction surveys, you **should** give them a deadline in *Days to Complete*. Without a deadline, learners might not prioritize the survey.

   If learners don't complete the survey by the deadline, they see that the survey is overdue. They can still launch overdue surveys.
7. In *Include Comments Field for Each Question* decide whether you want question-level comments.
   - If you select *Yes*, then learners can type comments in response to each survey question.
   - If you select *No*, then learners can't type comments in response to each survey question.
8. Click *Apply Changes*.

5.16.7 Configuring Course Follow-Up Surveys

Configure course follow-up surveys to change how they behave.

Context

Depending on the type of survey, you have different configuration options. Read this topic to configure **follow-up** surveys: surveys that ask learners about their satisfaction with a course they complete. Please note that follow-up surveys are never anonymous. This behavior is different than satisfaction surveys, which administrators may configure to be anonymous.

Procedure

1. Go to Learning Administration, and then go to *Content* > *Surveys*.
2. Find and open the survey that you want to configure.

   > **Note**
   >
   > The survey must be a **follow-up** survey. The options are different for **satisfaction** surveys.

3. Go to *Options*.
4. In *Post Evaluation*, decide the deadlines to complete the survey.

Option	Description
Assign ... Days from Item Completion	Type the number of days after learners complete the course that the system automatically assigns the follow-up survey. Set a number of days that gives learners enough time to apply their new knowledge but alsodoesn't last too long. Provide enough time to apply skills but not enough time to forget about the survey.
Allow ... Days to Complete	Type the number of days after the system assigns the survey that users must complete and submit the survey. This is their deadline for completing the survey.

5. In *Participants*, decide who receives a copy of the survey.
   - Select *Employee* if you want the participant (and only the participant) to reflect on their own ability to apply the skills and knowledge from the course.
   - Select *Manager* if you want the participant's manager (and only the manager) to reflect on the employee's ability to apply the skills and knowledge from the course.
   - Select *Both* if you want both the participant and the manager to reflect on the employee's ability to apply the skills and knowledge from the course.

   The participants that you choose are assigned the survey. They receive their assignment in the days that you set in *Assign ... Days from Item Completion*
6. In *Required for completion by*, decide who is required to complete the survey.

Choice	Description
Employee	The participant in the course is required to complete the survey. If you select this, be sure that you also selected *Employee* in *Participants*.
Manager	The manager of the participant in the course is required to complete the survey. If you select this, be sure that you also selected *Manager* in *Participants*.

7. In *Include Comments Field for Each Question* decide whether you want question-level comments.
   - If you select *Yes*, then learners can type comments in response to each survey question.
   - If you select *No*, then learners can't type comments in response to each survey question.
8. Choose *Apply Changes*.

Related Information

Configuring Course Satisfaction Surveys [page 106]

5.16.8 Adding Survey Questions and Instructions

Add survey questions and instructions if you're creating either a course satisfaction survey or a course follow-up survey.

Prerequisites

Most satisfaction surveys use rating scale questions to ask respondents their level of satisfaction with a course. If you plan on using rating scales for your survey questions, add them in *References* > *System Administration* > *Rating Scales*.

Context

> **Note**
>
> In Learning, you add questions for surveys differently than adding questions for exams or quizzes (assessments). These instructions apply to adding questions for **surveys**.

Procedure

1. Go to Learning Administration, and then go to *Content* > *Surveys*.
2. Find and open the survey that you want to configure.

   > **Note**
   >
   > The survey must be a **follow-up** survey. The options are different for **satisfaction** surveys.

3. Go to *Questions*.
4. Choose *Create Draft*.
5. In *Survey Instructions*, type an introduction to explain the purpose of the survey and how you plan to use the data or feedback you receive.
6. Define the page of your survey.

Choice	Description
Resource Type	For **satisfaction** surveys, select the resource type that the questions on the page apply to. Many customers create a page to measure satisfaction with the instructor, and so they select *Instructor* in *Resource Type*.
Title	Add a title for the page. The title helps orient people to the purpose of the page.
Instructions	Add instructions for the page. Consider explaining why the page is important or what the group of questions measures.

7. To add multiples pages, click .

   Pages organize surveys into sections. Divide the survey different for **satisfaction** or **follow-up** surveys.

   - For **satisfaction** surveys, consider adding just a few pages and focusing each page on a part of the experience. Many customers organize by **satisfaction with instructor** and everything else. If you want to use the same organization, create two pages.
   - For **follow-up** surveys, consider adding a page for each behavior or skill. For example, if the survey follows up on leadership skills and behavior, you can divide into pages like consensus building, motivating teams, conflict resolution.

8. To add a question in the page, click , and then type the question in the text field.
9. In *Question Type*, define the type of response you want from participants.

   - The most common question type for satisfaction surveys is *Rating Scale*. Survey respondents select a rating on a scale of their agreement or satisfaction with the statement that you enter in the *Questions* box.
   - If you select *One Choice*, respondents must select one choice from a set of choices you give them. Add choices by clicking .
   - If you select *Open Ended*, respondents type their answer to your question.
   - If you select *Multiple Choice*, respondents can select one, more than one, or no answer from a set of choices you give them. Add choices by clicking 

10. Click *Save Draft* to save the questions as you continue adding them.
11. When you're finished adding questions, click *Preview* > *Draft* >.
12. When you're satisfied with the exam in the source language, click  to translate text into target languages.
13. When you have finished translating, click *Publish*.

Next Steps

After you publish a survey, you can add it to a course.

- Go to *Learning Activities* > *Items* > *Surveys* > to add them to individual courses.
- Go to *Content* > *Surveys* > *Item Usage* > to add in bulk.

> **Note**
>
> To edit the survey **after** you add it to a course, add a new question and remove the existing one. We track each answer by its location in the list, so the data in reports can be inaccurate if you reorder or remove an answer.

If you make changes to and **republish** the survey, then the system updates the survey for users who didn't yet start it. If a user started but didn't yet finish the survey, then the system overrides the user's incomplete survey with the new survey, requiring him or her to restart the survey.

Related Information

Translation Support for Learning Surveys [page 114]
Learning Competency Scales Compared to Platform Competency Scales [page 115]
Learning Rating Scales [page 115]
Configuring Course Satisfaction Surveys [page 106]
Configuring Course Follow-Up Surveys [page 107]
Assigning Surveys to Courses in Bulk [page 104]
Assigning Satisfaction Surveys After Learning Item Completion [page 112]
Adding Follow-Up Surveys to Learning Items [page 113]

5.16.9 Adding Learning Rating Scales

Add learning rating scales so that you can create Learning surveys.

Context

In Learning, rating scales are for surveys and for competencies. They aren't shared with the rest of the suite.

If you're importing competencies from Job Profile Builder, you must create a rating scale for competencies that matches the rating scale in SAP SuccessFactors Platform. Use only one competency rating scale.

Procedure

1. Go to Learning Administration and then go to *References* > *System Administration* > *Rating Scales*.
2. Choose *Add New*.
3. Add a description that helps others understand the rating scale.
4. In *Maximum Rating*, type the highest point number in the rating scale and then click *Apply*.

   You see a new rating scale starting at 1 and ending at the maximum rating.
5. In *Rating Label*, type a description for each numeric rating.

   For example, type Poor to describe a rating of 1 and Excellent to describe a rating of 5.
6. In *Reporting Groups*, type the number of ranges that you want to report on and then choose *Apply*.

Each reporting group is a range that appears in the report. For example, scores between 4.5–5 can report as excellent.

7. In *Range*, adjust the ranges of the reporting group.
8. In *Reporting Group Label*, type the text that you want to appear in the reports when scores are in the range.
9. Choose *Add*.

Next Steps

If your users speak more than one language, localize the labels.

5.16.10 Assigning Satisfaction Surveys After Learning Item Completion

Assign satisfaction surveys to users who have completed learning items so that you can receive feedback on the courses and improve the courses over time.

Prerequisites

Before you can assign the satisfaction survey, you must create it. Go to *Content* > *Surveys* and create a survey of type *Course Feedback*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to measure for participant satisfaction.
3. Go to *Surveys*.
4. Complete the information in the *Course Feedback Survey : User Satisfaction* section.

This Field...	...Is Used as Follows
Survey	The survey that users see after they complete the learning item. Surveys must be published and active.
Days to Complete	The days between the timestamp of when the completion was recorded and the deadline to complete the survey. For optional surveys, the survey only is available until the deadline.

This Field...	...Is Used as Follows
	For mandatory surveys, the survey remains available after the deadline but is shown as overdue. The associated learning item remains in a pending state until the survey is completed or an administrator records learning completion. The default value is inherited from the survey.
Required for Item Completion	If you clear this box, users aren't required to complete the survey before the learning item goes into their learning history (completed work). If you select the box, then users are required to complete the survey before the learning item moves into their learning history (completed work). The default value is inherited from the survey.

5. Click *Apply Changes*.

Next Steps

After you assign the survey to the learning item and users begin to complete the survey, you can see the results in the evaluation reports. Go to SAP SuccessFactors Learning Administration and then go to *Reports*. In *Search* type **`Item Evaluation`**. You see the reports that show you the user feedback.

5.16.11 Adding Follow-Up Surveys to Learning Items

Add follow-up evaluations to learning items to see if users can apply their work after they complete a learning item.

Prerequisites

Before you can add follow-up surveys to learning items, you must create the survey. Go to *Learning Activities* > *Surveys* and add a survey of type *Follow-up Surveys*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to add follow-up evaluations to.
3. Go to *Evaluations*.

> → Tip
>
> Depending on how your administrator environment is configured, you need to click *More* to see *Evaluations*.

4. In *Follow-up Surveys*, complete the fields.

This Field...	...Is Used as Follows
Survey	The survey that users receive. The survey must be of type *Follow-up Survey*. Users and possibly their supervisors receive this survey to see if they're applying what they learned.
Participants	You can send this survey to employees supervisors or both employees and supervisors. We recommend that you include supervisors to get an outside opinion on whether users are applying their knowledge.
Required for completion by	When you require a follow-up evaluation from an employee or supervisor, the survey remains on their assignments and can't be removed until they complete it. The learning item inherits its values for *Required for completion by* from the survey, but you can break the inheritance.
Configuration	In the *Assign...Days from Item Completion* box, you can enter a number of days after users complete the associated item that the system automatically assigns the follow-up survey. In the *Allow...Days to Complete* box, you can enter a number of days after the system assigns the survey that users must complete and submit the survey.

5. Click *Apply Changes*.

Next Steps

After you assign follow-up evaluations to learning items and users begin to complete them, you can check the results by going to *Reports*. In *Search*, type **`Follow-Up`** to return the follow-up evaluation reports.

5.16.12 Translation Support for Learning Surveys

Learning supports translation of satisfaction and follow-up surveys for customers with respondents in multiple languages.

For customers who use surveys in more than one geographic locale, surveys support localization. You translate the surveys using the standard Learning localization framework.

The following additional information applies to survey localization:

- To prevent a partially translated survey, after you source text for any field in a locale, all of the fields must have a value for that locale. You can save, but they cannot publish until everything has been translated.
- You must translate one field and then click *Save Draft* for the localization buttons to appear for the questions. For example, administrators can translate the name of the survey, then go the *Questions* tab and click *Save Draft*. After they do, the localization buttons appear for questions.
- The survey is displayed in the user's preferred Learning language. If the survey is unavailable in a respondent's preferred language, the survey falls back to the system default language.

5.16.13 Breaking the Link Between a Notification and Its Corresponding Template ID

View this section if you want to know about breaking the link between a notification and its corresponding template ID.

If you **don't** attach a file or customize the notification, then the system creates a link between this notification and its corresponding notification template ID . If you customize the notification template ID (*System Administration* > *Manage Email* > *Email Notification Templates*), then the system updates the values on the Notifications tab. However, if you attach a file or customize any of the values on the Notifications tab, then the system **breaks** the link between this notification and its corresponding notification template ID. If you break the link, the system doesn't update any records for which you modified values on the Notifications tab.

5.16.14 Learning Competency Scales Compared to Platform Competency Scales

As an administrator, when you understand the difference between Learning competency scales and Platform competency scales, you can see the difference between how each is used.

SAP SuccessFactors Learning competency scales and Platform competency scales do not interact, so you have two views of competencies:

- A view from inside SAP SuccessFactors Learning, which can tell you how users increased their competency based on some courses that they completed.
- A view from inside the rest of SAP SuccessFactors HCM suite, which can tell you how users are being rated by peers, managers, and so on for their competencies.

Because of the split view, we recommend that you set one rating scale for competencies and then you apply it to all competencies in SAP SuccessFactors Learning.

5.16.15 Learning Rating Scales

In Learning, competencies and surveys use rating scales.

A rating scale is a scale of integers that rate users on competencies or surveys in Learning. The scale includes a value, a rating label, and a calculation. For example, you can create a five point scale, with labels like "Excellent" for 5, "Great" for 4, "Average" for 3, and so on. Then, you can define reporting groups to calculate a result based on the rating. For example, you can set a range of 4-5 as "Above Average".

Later, when you report in Learning on the competencies or survey results, you see users' scores based on these rating scales and the rating groups. The reports and rating scales apply only to Learning reports. Other SAP SuccessFactors reports on competencies use their own scales.

5.16.16 Learning Evaluation Types

In Learning, you can evaluate courses and users experience in learning items in different ways. Select the evaluation that you need for your business case.

Evaluating User Satisfaction with a Course

You often want to know how users felt about the course. You can ask them, for example, whether the instructor was engaging, whether the course materials were useful, and how the facility met their needs. We call these types of evaluations **satisfaction surveys**.

To create a satisfaction survey, you create a survey that asks the questions about satisfaction. Then, you associate the survey to the learning item's *Evaluations* area. Finally, after users complete the satisfaction surveys, you can see the results in *Reports*, in survey response reports.

Evaluating User Progress During a Course

You sometimes want users to take a pretest and then a post-test to see how they progressed from the beginning of the course to the end. When users cover a large gap between pretests and post-tests, you can say that the course is valuable. If they cover a smaller gap, then you might want to look at who is enrolling or how you can better instruct those who are enrolled.

> ⓘ Note
>
> Pretests and post-tests measure progress to learning objectives. If you haven't added learning objectives, then pretests and post-tests don't work.

As users complete pretests and post-tests, SAP SuccessFactors Learning records their scores against the learning objectives. You can see the results in *Reports*, in learning evaluation reports.

Evaluating User Ability to Apply Knowledge

We provide two ways to evaluate whether users can apply their knowledge. You can create follow-up evaluation surveys or you can create task lists. If you want to tie the completion of a learning item to an observation of applied learning, then we recommend follow-up evaluations. However, if you want to create a separate test of users' observed skills, we recommend tasks lists.

To create follow-up evaluation surveys, you create a survey that asks users and their managers about the application of knowledge that they gained in the learning item. For example, if the learning item taught writing skills, the survey could ask questions about whether the user gets to the point immediately in emails, considers audience, when writing, and so on. Users and their managers can receive the surveys. As they complete the survey, you can see the results in follow-up reports.

To create task checklists, add a new learning item of type other and add tasks to it. Users must be observed accomplishing the task to complete the learning item. To use task checklists, you must be using tasks.

Creating Direct, Formal Quizzes and Exams

Especially for online content, you can add quizzes and exams that measure users' knowledge at the end of the course. To add quizzes or exams, create the assessments and then add them to *Online Content* in the learning item.

5.17 Adding Learning Items to Libraries from the Learning Item Workspace

Add learning items to libraries so that users can browse and search for the learning items inside their libraries.

Prerequisites

To add learning items to libraries, the library must first exist. In most cases, you set up libraries before learning items, so the library probably exists. If you need to manage or add libraries, go to *Learning Activities* > *Libraries*.

Context

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

> **Note**
>
> Although you can quickly add a single learning item to many libraries from the learning item record, we recommend that you do your library work from within the library so that you can see the entire library at once. Go to *Learning Activities* > *Libraries* > *Items*.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to change.
3. Click *Libraries*.
4. Click the add button and then choose the library that the learning item should go into.
5. In *Library Options*, change the behavior of the learning item in the library.

5.17.1 Checking the Libraries that a Learning Item Belongs To

If you're troubleshooting access problems with a library, you can go to a learning item and see all the libraries that it belongs to.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to investigate.
3. Click *Libraries*.

5.17.2 Changing the Price of a Single Learning Item in its Libraries

Change the price of a single learning item in many libraries when you want to raise or lower the price of a single learning item and you want the price change to appear in its libraries.

Context

When you change the price of a single learning item, you initiate the change from the learning item entity. SAP SuccessFactors Learning runs the library price change assistant, but because you're running it from the learning item entity, it skips the first steps of the assistant. It can skip the first steps because it passes the **current** learning item to the assistant.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to change.
3. Click *Libraries*.
4. Click *(Change Library Prices)*.

Results

The library price change wizard opens with the learning item preselected.

5.17.3 Adding Categories to Learning Activities

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

Prerequisites

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

Context

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

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

Procedure

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

Related Information

Course Categories [page 591]
Creating Course Categories (Subject Areas) [page 589]

5.18 Revising a Learning Item

Revise a learning item to control the availability and assignment of new or changed content. You can control how users who are assigned the old revision interact with the new revision.

Context

Not all companies need to use revisions. Often, you can just create a new learning item or update the current revision. Use revisions if you need to control how those users who are currently assigned a learning item should adopt the new version of the learning item.

Procedure

1. Go to SAP SuccessFactors Learning administration, and then go to *Learning Activities* > *Items*
2. Search for the learning item that you want to revise, and then open it.
3. In *Actions* click *Revise*.

   The learning item revision wizard opens.
4. In *Step 1*, add the date, time, revision number, and a title for the new revision, and when you're finished click *Next*.

This option...	...Is used as follows
New Revision Date, *Time*, *Time Zone*	The date and time of the revision is usually now (the moment that you start the revision wizard), but you might need to back-date the revision. Revisions dates and times help you distinguish earlier revisions from later revisions and record the time that you made the revision. The time zone of the revision date is important to recording the time correctly for all users in all time zones.
Revision Number	The number of the revision. Use the revision number to tell revisions apart. Although it can be any value, it usually matches a system: either your revision numbering system or the revision numbering system of the organization that provides or oversees the training.
Title	Text that distinguishes the revision from other revisions.

5. In *Step 2*, change the way the revised copy interacts with the original's substitute relationships, instructors, and online content, and when you're finished click *Next*.

This option...	...Is used as follows
Do you wish to copy the substitutes relationships for this item to the new revision?	When selected, SAP SuccessFactors Learning copies the substitutes relationships for this item to the new revision. Users who get the new revision can see a list of courses that substitute for the new revision. If you select this option, the

This option...	...Is used as follows
	list of substitutes doesn't change between the old revision and the new revision. In the administration environment, the list of courses in *Substitutes* is copied from the old revision to the new one.
Do you wish to change all authorized instructors to the new revision?	When selected, all instructors who were authorized to teach the old revision are authorized to teach the revised item.
This item has online settings. Do you wish to include the online settings in the new revision of this item?	If the old revision has online settings, you can select this to copy the online settings from the old revision to the new revision.

6. In *Step 3*, you can make the item production ready, and then when you're finished, click *Next*.
   - *Make this item production ready*: A production ready item is finished and ready to be used in curricula or classes.
   - *Do not make this item production ready*: If you need to make changes to the new version after you finish the revision wizard, select this option. If you select it, you skip the next step.

   > **Note**
   >
   > If you select *Do not make this item production ready*, you need to choose *Finalize Revision* in the *Actions* menu once you're ready to publish your changes. Until you finalize the revision, the current version of the item remains in effect.

7. In *Step 4*, decide how the new revision becomes production ready, and when you're finished, click *Next*.

This Field...	...Is used as follows
Do you wish to inactivate previous revisions of this item?	Select this to inactivate previous versions of this item. Inactivation removes the previous revision and replaces the new revision for any time you select the item in the future.
Do you wish to update curricula potentially affected by this new item revision?	Select this to update all item/curriculum relationships for curricula that have the item being revised associated with them. **When you select this, Step 5 appears.**
Do you wish to update learning plan assignments potentially affected by this new item revision?	Select this to update all users' learning plans who have the item assigned to them. The learning plan is updated to reflect the new revision. In the online environment, the online content of the old version remains on the learning plan, but the content is inaccessible. In Offline Player, the item is removed from the users' offline tasks.
Do you wish to change all future classes to use/access the new revision	Select this to cause all classes that have already been scheduled and that use previous revisions of the item to use the new revision of the item.

8. In *Step 5*, decide how the new revision should fit into period-based assignment, and when you're finished, click *Next*.

   Step 5 appears if you're making the new revision production ready, if the old revision is associated with a curriculum, and if you select *Do you wish to update curricula potentially affected by this new item revision* in Step 4.

This Field...	...Is Used as Follows
Curriculum ID	The unique ID of the curriculum that the learning item is assigned to.

This Field...	...Is Used as Follows
Initial Number	The number of time units a user is allowed between the assignment of a learning requirement and the required completion of that requirement.
Initial Period	The units that the *Initial Number* value uses.
Retraining Number	The number of time units required before the user is to re-complete a recurring learning requirement. In most cases, this is an annual retraining period, based on days, so it should be 365. It cannot be NULL.
Retraining Period	The units used by the *Retraining Number* value. In most cases, this should be *Days*
Assignment Type	Assignment types are categories you can establish for items to help you to prioritize a user's learning needs by distinguishing between required and suggested items.
Effective Date	The date when a new or revised item will be used for the calculation of item completion statuses and curriculum statuses.
Add the revised item to this curriculum using the information above	Select this to attach the new revision to the curriculum. **Don't** select this unless you want to add the new revision to the curriculum.

9. Check the revision to verify that the data is correct and then run the job to create the new revision.
    - Click *Run Job Now* to create the new revision immediately.
    - Click *Schedule Job* to create the new revision later - at a scheduled time.

Related Information

Curricula: Bundled Courses in Qualification Tracks [page 273]
Retraining in SAP SuccessFactors Learning Curricula [page 296]

5.18.1 Learning Item Revision

Some companies follow a strict course revision policy, often because they report their continuing education to a regulatory oversight body. If you're one of those companies, you sometimes need to revise your learning items to control the rollout of new training.

In SAP SuccessFactors Learning, training course (learning item) revisions have a specific purpose: they allow you to control the availability and assignment of new or changed content. You can define whether users who are assigned a learning item with an old revision must complete that version or are prompted to use the new revision of the same course.

You often revise when you make significant changes like adding content or time slots. For customers who report to a regulatory oversight body, you often revise when the regulatory body releases new advice or content. For example, if a learning item describes Generally Accepted Accounting Principles (GAAP) and a new version of GAAP is released, then we recommend that you revise the learning item to cover the revised GAAP content. If you find a small mistake in the learning item, such as a typo or a time slot isn't the correct length, we recommend editing the

existing version of a learning item (without clicking *Revise*). In these cases, the GAAP advice hasn't changed: you're adjusting the learning item to correct a mistake in the **current** GAAP training.

> → Tip
>
> If you don't need strict version control, then you don't need revisions. For example, if you want to add a new time slot and you want all people assigned to the learning item to pick up the new time slot, you can just add the new time slot without revising the learning item.

There are two possible outcomes in the revision process:

- The old revision is no longer accessible and users who had been assigned the old revision now have the new revision assigned. This occurs when you inactivate the previous revision of the learning item and update users' learning plan assignments when revising the learning item. The old revision isn't accessible from the learning plan or library, users have the new revision assigned instead. The old, inactive revision remains part of the curriculum, but can't be accessed by the user since the revision is inactive. When you record a learning event for a newer revision of a learning item, the *Completion of later Item revision grants credit for previous revision assignment* setting (*System Administration* > *Configuration* > *Global Application Settings*) determines whether the previous revision is removed from a user's learning plan **or** the previous revision of the learning item remains on the user's plan.
- Users still have access to the old revision and also have access to the new revision. This occurs when you keep the previous revision of the learning item active and users' learning plan assignments aren't updated when revising the learning item. The old revision remains assigned on the learning plan and the new revision is available in the library. This allows you to have a curriculum where the new revision is effective as of a future date but it can be taken in advance of that date. Users can still launch the old revision of the learning item. When users launch an old revision, they're prompted with the **option** to access the new revision of the learning item. If they do so, the new revision of the learning item is added to their learning plan (if it's not already there).

  > ⓘ Note
  >
  > Users **won't** be given the option to access the new revision in the following circumstances:
  > - The old revision is a prerequisite to the new revision and the user hasn't completed that prerequisite.
  > - The old revision is required and the new revision isn't a substitute.
  > - The new revision requires registration in order to take the online content and the user hasn't already registered.

Related Information

Curricula: Bundled Courses in Qualification Tracks [page 273]
Retraining in SAP SuccessFactors Learning Curricula [page 296]

5.19 Adding Prerequisites to Learning Items

Add prerequisites to a learning item (course) to require that users complete prerequisite courses before they're allowed to self-register into this course.

Prerequisites

Before you can add a prerequisite to a learning item, the prerequisite learning item or curriculum must already exist.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the course that needs prerequisites.
3. Click *Prerequisites*.
4. To create a new prerequisite group, click + *Create Group* and then type a name for the group in *Title*.

   Use prerequisite groups to give users a choice of tracks to complete a learning item's prerequisites. For example, if you are creating prerequisites for an advanced coding concepts, you might want participants to have some basic programming language courses. You might not care whether they know Java or C++ as long as they know one. You can create two groups, one titled **`Basic Java`** and one called **`Basic C++`**. Users can pick either group, but they must complete all courses in the group.
5. For each prerequisite that you want to add to the group, click + *Add Items/Curricula* .

5.19.1 Learning Item Prerequisites

A prerequisite is a course or set of courses that users should complete before they can enroll into the current course.

You often want to require that users demonstrate learning in more basic courses before they can enroll themselves into more advanced courses. For example, if you offer an advanced accounting course, you know that users won't succeed unless they have successfully completed more basic courses. You can add the basic course as a prerequisite of the advanced course.

> **Note**
>
> Prerequisites can be learning items or curricula.

5.19.2 Prerequisite Groups

Prerequisite groups offer uses a choice for how they can meet the prerequisites for a course.

Use prerequisite groups to give users a choice of tracks to complete a learning item's prerequisites. For example, if you are creating prerequisites for an advanced coding concepts, you might want participants to have some basic programming language courses. You might not care whether they know Java or C++ as long as they know one. You can create two groups, one titled **`Basic Java`** and one called **`Basic C++`**. Users can pick either group, but they must complete all courses in the group.

5.19.3 Results of Failing to Meet Learning Item Prerequisites

Prerequisites affect self-enrollment **only** so that you can waive the prerequisites.

Prerequisites affect only self-registration. As an administrator, you can always waive the prerequisites and enroll users directly into an advanced course. For example, if you make basic accounting courses are a prerequisite to advanced accounting courses, but you have employees who join your company with educational degrees in accounting, you can waive the basic accounting prerequisites. If you allow supervisors or Human Resource Business Managers (HRBP) to assign learning to their employees, they can likewise waive the prerequisites.

If you or a supervisor enroll a user into a course and SAP SuccessFactors Learning sees that the user hasn't completed the prerequisite, you see a warning that the user is missing the prerequisites. At that time, you can acknowledge that the user is missing the prerequisites and proceed to enroll the user.

We also do **not** prevent users from requesting courses based on prerequisites. If users haven't met the basic accounting prerequisite, they can still request the advanced course. When scheduling them into the course, you have the opportunity to examine a waiver on a case-by-case basis.

5.19.4 Substitute Relationships with Prerequisites

Any prerequisite course must be added to *Prerequisites* in the learning item. We don't recognize substitute credit as meeting a prerequisite. However, if you select *Provide Credit for Base Item If Not Assigned* as *Yes*, then the substitute credit is recognized for meeting the prerequisite.

Substitute credit can be confusing when working with prerequisites. Imagine that you want to create an Accounting 200 (Advanced Accounting) learning item and you want to make Accounting 100 (Basics of Accounting) a prerequisite. At the same time, imagine that you make Accounting 101 a substitute for Accounting 100. If users complete Accounting 101, they get credit for Accounting 100, but they haven't met the prerequisites for Accounting 200. Using this example, if you want Accounting 101 to be a prerequisite to Accounting 200, you must explicitly add it to *Prerequisites*.

If you add substitutes to the prerequisites, you almost always want to add each substitute in its own prerequisite group because prerequisite groups effectively do the same thing as substitutes: they give users a choice for meeting a requirement. If you want to give users the choice between completing Accounting 100 or Accounting 101 as a prerequisite, then you want to create two prerequisite groups, one for Accounting 100 and one for Accounting 101. Users see that they can take Accounting 100 **or** Accounting 101.

If you add both Accounting 100 and Accounting 101 to the same group, then you're telling users that they must complete Accounting 100 **and** Accounting 101. Because substitutes are implicitly an OR connection (a choice you give to users), you typically don't want to add them in the same group.

5.20 Importing Open Content Network Items Manually

Manually import content from Open Content Network (OCN) partners when you want to make their courses available to your users.

Prerequisites

To import open content, you need to:

- You've enabled OCN providerx.
- You've run the *Open Content Network Content Synchronization* process at least one time. After you run the process, you can see what courses are available from the vendor for import to your system.

Procedure

1. Go to *Content* > *Open Content Network*.
2. Search for the content you want to import.
3. For each course you want to import, select the *Import* check box and then click *Import*.

> **Note**
>
> If the title of a particular course doesn't appear in the course search results, then it's most likely in a different locale than the administrator's preferred locale.

Next Steps

You'll need to add the imported courses to a library to make them available to learners.

5.20.1 Open Content Network

This topic describes Open Content Network generally.

Open Content Network (OCN) provides access from SAP SuccessFactors Learning to Massive Online Open Courses (MOOC). When you set up a vendor on OCN, the vendor's courses appear in users' learning libraries. When users

log into SAP SuccessFactors Learning and go to their libraries (from their *Find Learning* tile, they see the OCN content in a separate tab.

To set up OCN, you need to:

1. Sign agreements with supported MOOC providers. For the current list of supported MOOC providers, see the support documentation.
2. Configure each provider in the OPEN CONTENT NETWORK system properties file (*System Administration* > *Configuration* > *System Configuration*).
3. Configure the Open Content Network Content Synchronization automatic process (*System Administration* > *Automatic Processes*). This automatic process syncs the vendors' libraries with the administrators' views of the library (in *Content* > *Open Content Network*). It doesn't sync the vendors courses into the users' libraries.
4. Go to *Content* > *Open Content Network* to pull the possible courses from the vendor into the users' libraries.

5.20.2 Open Content Network Usage Notes

Read these tips to help you use the Open Content Network.

The Open Content Network (OCN) in SAP SuccessFactors Learning pulls Massively Online Open Content (MOOC) courses from supported providers and makes the courses available to users in their catalogs. When importing the content, SAP SuccessFactors Learning attempts to strike a balance. We want to import this content so that it behaves like your company's private content but at the same time keep it separate from your company's private content. To create the balance, we created some ways for you to manage the balance.

> **Note**
>
> To post courses to SAP SuccessFactors Learning from Open Content Network providers Lynda, Udacity, and Coursera, use only the `POST /learning/odatav4/public/admin/ocn/v1/OcnCourses` API end point. For more information, refer **Related Information** section.

- Instead of making all content from a provider available to your users, we provided ways to select providers and select the content from the providers that you want to make available:
  - Before any MOOC courses can be imported, you must configure a provider in *System Administration* > *Configuration* > *System Configuration* > *OPEN CONTENT NETWORK*. If you don't enable the system or any providers, your Learning Management System (LMS) works entirely with private content.
  - If you choose to enable a MOOC provider, that doesn't automatically mean that all its courses appear in your system. Instead, you go to *Content* > *Open Content Network* and selectively import the courses that your company needs.
- After you import content, the content is still separated from your private content:
  - Users see two separate lists of courses in their catalogs: a list of private courses that you create traditionally in your system and a list of courses available on the web.
  - Learning items have a learning item classification that is specific to MOOC content: EXTERNAL-COURSE. You can think of the classification as a tag on the MOOC content, making it easier to find in searches.
  - Learning items are also tagged by provider. You can search for EXTERNAL-COURSE and you can also search by a specific provider.

- When users launch MOOC courses, they interact with the course outside the SAP SuccessFactors Learning system.

  > **Note**
  >
  > One exception to this rule is the Lynda content provider. Lynda has AICC content available, so SAP SuccessFactors Learning uses single sign on to track user progress.

- To make the content easy to use, it does behave like your company's private content:
  - Each MOOC course is a learning item just like your private courses.
  - Each MOOC course you import is one learning item.
  - You can manage the MOOC learning items as you would manage other learning items: assign them to catalogs, for example, or assign them directly to users.
- MOOC content isn't covered by SAP SuccessFactors Learning commerce. If you set a price and chargeback method other than No Charge, the actions buttons disappear from the course in the users' catalogs.

Related Information

Open Content Network Course Import Web Service Parameters

5.20.3 Configuring Open Content Network Single Sign On

View this section if you want to know how to configure OCN SSO.

> **Note**
>
> To complete the setup, go to *Admin Center* > *Authorized SP Assertion Consumer Service Settings* and specify the correct "Assertion Consumer Service" and "Logout URL" entries. Please be aware that both values are required for the configuration to be saved successfully. For clarification regarding either entry, please reach out to the OCN vendor. For more details, please refer to Knowledge Base Article 3391826. If you're unable to complete the configuration through Admin Center, please contact your implementation partner or SAP Support ("LOD-SF-LMS-OCN" component) and provide the "Assertion Consumer Service" and "Logout URL" values and BizX Company ID so the configuration can be performed via Provisioning.

Open Content Network (OCN) has an integrated user Single Sign On (SSO) available with Lynda.com. Lynda.com offers Aviation Industry CBT Committee (AICC) course tracking, allowing us to utilize session SSO for the user through BizX, and bookmarking and record completion can happen automatically.

The SSO feature requires additional setup. In order to enable the full SSO process with Lynda.com, customers can work with Customer Service (CS) or your implementation team to get your environment's Security Assertion Markup Language Identity Provider (SAML IDP) metadata that is provided to Lynda.com. This is done so that Lynda.com can set things up on their end.

Lynda.com then provides the customer with their organization's ID value that can be configured in the OCN properties file, as well as ensure the LMS instance is available for user SSO at the Lynda.com site. Customers will also need to have the SAP SuccessFactors CS or implementation team configure the environment for SSO with Lynda.com by adding the following SSO parameters in Provisioning:

- Assertion Consumer Service - https://shib.lynda.com/shibboleth-sp
- Logout URL - https://shib.lynda.com/Shibboleth.sso/SLO/POST

When the configuration is complete on both ends, users will have the ability to launch Lynda.com courses without having to additionally register or enter login credentials at their site. If the user account does not already exist under that organization's ID, the account will be auto-created for the user during their first course launch.

Related Information

Configuring SAML for OCN

5.21 Tips for Managing your Course Workspace

You often work with many courses so managing your course workspace can make finding and managing courses easier.

Your course workspace is in *Learning Activities* > *Items*. We include some tools for helping you manage your courses and your workspace.

- Use custom fields as labels to make your courses easier to find. For example, your organization might want to label courses by the administration group. You can label the courses and then search by your administration group.
- Deactivate courses and search for active courses. Chances are that you edit only active courses. If you have a process for deactivating courses, you have an easier time finding the active ones.
- Delete courses if you make a mistake early in your course creation process: before you assign it or schedule it.

  Deactivating a Learning Item [page 129]
  Deactivate a learning item to remove it from current transactions like assignments or reports but keep it for audit trail.

  Deleting a Learning Item [page 130]
  Delete learning items when you make a mistake and the learning item has never been assigned. This often happens early in the development of your Learning Management System (LMS) course set.

5.21.1 Deactivating a Learning Item

Deactivate a learning item to remove it from current transactions like assignments or reports but keep it for audit trail.

Context

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.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to deactivate.
3. In *Item Details*, set *Active* to *Inactive*.

Task overview: Tips for Managing your Course Workspace [page 129]

Related Information

Deleting a Learning Item [page 130]

5.21.2 Deleting a Learning Item

Delete learning items when you make a mistake and the learning item has never been assigned. This often happens early in the development of your Learning Management System (LMS) course set.

Context

> ⚠ Caution
>
> When you delete a learning item, you remove the learning item record completely: you cannot recover it. As an alternative to deleting a learning item, consider making it inactive.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to delete.
3. In *Actions*, click *Delete*.

Task overview: Tips for Managing your Course Workspace [page 129]

Related Information

Deactivating a Learning Item [page 129]
Deactivating a Learning Item [page 129]

5.22 Common Troubleshooting in Courses

When you troubleshoot courses, you usually need to look up the connections between the course and what uses the course, so we provide quick views of those relationships.

As the fundamental unit of learning, courses are connected into many other parts of your learning system. For example, curricula use courses and so do programs. You schedule courses into classes. The most common troubleshooting task is to understand these relationships. Go to *Learning Activities* > *Items*, find the course that has the problem, and then use the quick views to see the relationships.

- If a learner isn't assigned a course that they must be assigned, check the assignment profiles that assign the course and check the curricula that include the course. If you check those views and they're behaving as expected, check the learners' direct assignments.
- If you're having a problem with a class that has been scheduled for a course, check the schedules and enrollment of the course. It could be that it was canceled or didn't meet minimal enrollment.
- If you're having a problem with Open Content Network (OCN), check the OCN sessions.

5.22.1 Viewing Open Content Network Sessions

View Open Content Network (OCN) sessions to see upcoming live sessions for a learning item that has been created through OCN import.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to check.
3. Go to *OCN Course Sessions*.

5.22.2 Viewing the Schedules and Enrollment of a Learning Item

When you're troubleshooting learning items (courses), you often need to see when and where the learning item is offered and how many users are enrolled in each scheduled offering.

Context

You often want to see the classes for a learning item to understand when and where users can go participate in the course. For example, you want to look at how often the learning item is offered or where the learning item is offered. You also want to balance the registration: if an offering is full, you want to see if the item is offered nearby but has a lower enrollment. You can move participants from one offering to the other.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then and go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to investigate.
3. Click *Classes*.
4. Use the table of classes to understand when and where the learning item is scheduled and who is enrolled.
5. To modify one of the classes or to drill down and investigate individual classes, choose the required class ID.

5.22.3 Checking the Curricula that Use a Learning Item

When you're troubleshooting, you sometimes need to see which curricula use a learning item (a course).

Context

When troubleshooting assignments, you often need to look up the curricula that use a learning item. You can open the learning item and see its curricula. If you need to add and remove learning items from the curriculum, however, we recommend that you do that from the curriculum view: *Learning Activities* > *Curricula*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.

2. Find and open the learning item that you want to investigate.
3. Click *Curricula*.

5.22.4 Checking the Assignment Profiles that Assign a Learning Item

If you want to know the assignment profiles that assign learning items (courses) to users, you can open the learning item and check its assignment profiles.

Context

Often, you want to know which assignment profiles are automatically making assignments of learning items to users so that you can troubleshoot how learning items are being assigned. In this case, you know the learning item, but you don't know which assignment profiles assign that learning item. You can start with the learning item and work back to its assignment profiles.

> **Note**
>
> You can add the learning item to an assignment profile from within the curriculum, but we recommend that you add the learning item by opening the associated **assignment profile**. By going to the assignment profile, you can check the rules, preview the users, and use the other tools that help you make accurate assignment choices.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to investigate.
3. Click *Assignment Profiles* to see the list of assignment profiles that assign the learning item.

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

   > **Note**
   >
   > You can also search by *Status* in the *Assignment Profiles* tab for both the *Item* and *Curricula* entities. The search box was previously labeled as *Search by ID or Description* and now is displayed as *Search*.

4. Click any assignment profile to open the assignment profile.

Related Information

Creating an Assignment Profile [page 377]
Executing Changes for Assignment Profile Rules [page 382]
Setting Up Assignment Profile Rules [page 380]
Assignment Profile Propagation Status [page 385]

5.23 Less Common Course Configuration

Some course configurations are less common, but they are useful for some customers: Commerce functions like tracking costs and prices or government reporting, making an exception to the inheritance of the course, or attaching the course to advanced functionality.

We include functions that are less common but important to a set of customers. The less common configurations fit into these categories:

- Pricing, cost, and budgeting: some customers track costs, a few customers add prices to courses, and a few customers use Training Planner to budget their training expenses.
- Exceptions to inheritance: You control some course configuration globally. Most importantly, you use course type to control how courses are graded. In most cases, you want all courses to inherit their global configurations. In s a few cases, however, you might want to override the global configuration.
- Advanced functionality: We offer some advanced functionality, such as substitutes, social learning, revisions, and adaptive courses. These advanced functions usually require a more structured configuration, including curricula, and extra implementation.

5.23.1 Enabling Detailed Content Object Audit on Learning Items

Enable detailed content object audit on learning items when you want to write custom reports that show the times that users launched content objects.

Prerequisites

Enable the content object audit globally in your system.

Context

If you are writing custom reports to SAP SuccessFactors Learning and if you need the reports to show the times that users accessed content (as opposed to a simple sum of all time a user spent in the content), then you can enable individual learning items to audit their content objects.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and edit the learning item that you want to audit.
3. Click *View All* and then set *Enable Content Object Audit* to *Yes*.
4. Click *Save*.

5.23.2 Setting a Price for a Learning Item

Set a price for learning items if you use finance features to charge users for courses.

Context

When administrators add learning history for this item, SAP SuccessFactors Learning populates the default price of the learning item and its currency ID boxes based on the default price and currency that you set. When managers add to learning history, the default price for items comes from (in this order) the price in the library, the price associated with the class, the price associated with the item.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to change.
3. Go to the *Pricing* tab.
4. To allow this learning item's classes to override the price you set here, select *Class Can Override Item Prices*.

   If course has a price, administrators can sometimes change the price of individual classes of the course. For example, you can add a CPR Certification course at a cost of 100 Euros. In most cases, every class held for CPR Certification costs 100 Euros. But if a group wants a special class that if off-site or held at the last minute (or another extraordinary circumstance) the administrator can change the price. For example, a last-minute class can cost 200 Euros instead of 100 Euros. SAP SuccessFactors allows administrators to override the default price only if the course is flagged to allow override.

5. To add a price for an existing currency, type it in the currency's *Price* field.
6. To set a particular currency as the default currency, select *Default* in that row.
7. To add additional currencies for the prices, choose *Add More Currencies*.

5.23.3 Configuring Purchasing Options for Learning Items

Configure the purchasing options for learning items (courses) to control how SAP SuccessFactors Learning debits and credits accounts when users purchase the learning items.

Prerequisites

Before you can assign account codes to learning items, they must already exist in SAP SuccessFactors Learning. In almost all cases, they already exist because you set them up during implementation.

Context

If you're tracking the cost and profit of your courses, then you set how learning items reconcile the costs during a transaction. When you set the financial behavior on a learning item, its classes inherit the behavior. You can, however, break the inheritance for any one class based on the learning item.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to change.
3. Choose *Purchasing*.
4. In *Purchasing Option*, select how you want SAP SuccessFactors Learning to handle purchasing of this learning item (and classes based on this learning item).
    - Select *Charge to Buyer's Authorized Account Code* to automatically populate the users' assigned account codes when they purchase. Users can change the account code to another that they **are permitted to use** (for example, an organization's account code).
    - Select *Charge to Buyer's Specified Account CoOde* to automatically populate the users' assigned account codes when they purchase. Users can change purchase to **any other account code** in SAP SuccessFactors Learning, provided they know the code.
    - Select *Distribute Charges to Specified Account Codes* to name the accounts that are charged when users purchase this course. If you select this option, you must name the account codes in *Add a Cost Center to the Item*, which appears after you make your selection and choose *Apply Changes* If you choose this option, the UI will display the Sponsored label for the class, and the class price will be shown with a strikethrough.

> **Note**
>
> The *Distribute Charges to Specified Account Codes* option doesn't apply for users with a *Shopping Account Type* of *External*. This set of users will still need to purchase courses using another method of payment, such as an account code.

- Select *No Charge* to exempt this learning item from financial transaction. Depending on your configuration, users can still see a price for the learning item.

5. Choose *Apply Changes*.
6. If you selected the purchasing option *Distribute Charges to Specified Account Codes*, then in *Add a Cost Center to the Item*, choose *add one or more from list*, and then search for and add the cost centers that should be debited when users purchase.

   If you selected one of the other purchasing options, skip this step.

   > **Note**
   >
   > By default, the percentages of distribution are equal: if you add two account codes, each account code bears 50% of the cost; if you add four, each bears 25% of the cost, and so on). You can change the distribution in *Percentage*. Because you can adjust percentages after you add them, SAP SuccessFactors Learning doesn't save your changes until you choose *Apply Changes*.

7. If you're using profit centers, then in *Add a Profit Center to the Item*, choose *add one or more from list*, and then search for the profit centers that should be credited when users purchase this learning item.

   If you selected one of the other purchasing options, skip this step.

   > **Note**
   >
   > By default, the percentages of distribution are equal: if you add two account codes, each account code receives 50% of the profit; if you add four, each bears 25% of the profit, and so on). You can change the distribution in *Percentage*. Because you can adjust percentages after you add them, SAP SuccessFactors Learning doesn't save your changes until you choose *Apply Changes*.

8. If you're updating the financial posting type, then in *Update Financial Posting Type*, select the *Allocation Code* from the dropdown list. The *Financial Posting Type* can be specified when an integration to an external financial system is enabled in the system. Otherwise, the section is hidden. A value can be specified when the *Purchasing Option* is set to a value other than *No Charge*.

5.23.4 Making an Exception to the Cost Calculation of a Learning Item

Make an exception to how a learning item's costs are calculated if you need to make an exception to the variables or the values used to calculate the cost of the instructional design.

Prerequisites

Before you can add costs to a learning item, the cost names must exist. In almost all cases, they already exist because we include the most commonly used costs by default and you can add additional cost names during implementation.

Context

If you track the cost of delivering training, then you can make an exception the cost of a learning item. In most cases, learning items inherit the cost calculation from their type. You set up the cost calculation for learning item types during implementation. In some cases, you need to change the values of the calculation formula because the amount of the design cost can vary from course to course. In a few cases, you need to change the variables of the cost calculation.

Importantly, this is **not** the total or realized cost of a course. Total costs are handled at the class where the cost of the learning item can be added (or not added) to the cost of the instructor, facility, equipment, and so on. In the learning item, you are simply recording the cost of the instructional design and maintenance of the instructional design.

> **Note**
>
> We describe the default cost names and their default usage and behavior. If you customized costs names or built a custom cost calculator, please see your implementation materials.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to change.
3. Click *Cost Calculation*.
4. In *Cost Currency*, select the currency to use when recording the costs for this learning item.
5. In the table of cost names, type a value or a formula for all costs.

In this Cost Name...	Add the cost of...
ItemInitialCost	In *ItemInitialCost*, type the cost of the initial instructional design. For example, if you paid a vendor $5000 to design the course, then the cost currency is U.S. Dollars and the cost is 5000.
ItemMaintenanceCost	In *ItemMaintenanceCost*, type the cost of maintaining the learning item. For example, if you pay a vendor $3000 to maintain the course, then the cost currency is U.S. Dollars and the cost is 3000.
ItemCreationCost	In most cases, the cost of creating the learning item is calculated by adding the initial cost and the maintenance cost. In some cases, however, you might need to change it.

6. Click *Apply Changes*.

Related Information

Course (Learning Item) Types [page 588]
Adding E-Signature Meaning Codes [page 1016]
Adding Default Value-Based Grading Rules for SAP SuccessFactors Learning [page 585]
Adding Default Cost Calculations for SAP SuccessFactors Learning Courses [page 587]

5.23.5 Making an Exception to How a Learning Item Is Graded

Although you usually want learning items to inherit their learning items from their learning item type, you can make an exception for individual learning items.

Context

In most cases, learning items inherit their grading system from their learning item type. During implementation, you set up learning item types and their grading systems in *References* > *Learning Activities* > *Item Types*. Sometimes, however, you need to make an exception for an individual learning item.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to change.
3. Click *Grading Options*.
4. If you want to override the default grading system with a value-based system, then select *Value-Based*, click *Apply Changes*, and then set the values and the completion status given for the value.

This Field...	Is Used as Follows...
Value	The value that users must get as a grade for the learning item.
Description	Add a description to help users understand the value.
Completion Status	The completion status that users are assigned if they receive the value.

For example, the values can be “Pass”, “Fail”, and “Incomplete”. Write a description to tell graders what these values mean in the context of this course type. For example, in the context of certification, “Pass” might means specifically that the user passed the certification test.

5. If you want to override the default grading system with a numeric system, then select *Numeric*, click *Apply Changes*, and then set the completion status given for the numeric range.

This Field...	Is Used as Follows...
Minimum	The low range that a user must have to get the completion status.
Maximum	The high range that a user must have to get the completion status.
Completion Status	The completion status that users are assigned if they fall into the range defined by *Minimum* and *Maximum*.

For example, if an administrator runs the *Add Learning History* wizard to post completion for a course of this type, and if you specify that users with a minimum of 80 and maximum of 100 get the completion status “Certified”, then every user who has a grade from 80 through 100 receives the “Certified” completion status.

Next Steps

If you make a mistake and want to remove the exception, you can go back and select *Inherit from Item Type*.

5.23.6 Configuring a Learning Item for Government Reporting

Configure a learning item for government reporting to correctly populate the Declaration No. 2483 reporting form.

Context

Very few customers use government reporting. It’s used when you must report your training expenditures to a government entity. Specifically, it was built for a French law and the Declaration No. 2483 form.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that needs to be configured for government reporting.
3. Click *Government Reporting*.
4. Click *Include in government reporting* to add this learning item to the *Government Reporting Learning Events* report.
5. In *Reporting Legal Entity*, select the 2483 Legal Entity record that this report should be added under for reporting purposes.
6. In *Training Type*, select how you want this learning item to appear on the report.
   - If you select *Internal*, then it's counted as internal training on the report.
   - If you select *External*, then it's counted as external training on the report.

   The categories of internal and external have specific meanings to the government agencies that you report to. For the correct definitions, consult with your regulations.
7. Click *Apply Changes*.

5.23.7 Adding SAP Jam Groups to a Learning Item

Add SAP Jam groups to learning items to automatically invite users in a course (a learning item) into a group. As members of the group, users can collaborate, share work, and set deadlines.

Prerequisites

You can check theSAP Jam groups associated with learning items if you have an integration between SAP SuccessFactors Learning and SAP Jam. If you aren't sure if you have an integration set up, you can go to Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*. Open *LMS_ADMIN* and check the value of `jamIntegrationEnabled` if it is set to `true`, then you have an integration. If it is set to `false`, then you do not have an integration.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to investigate.
3. Click *Jam Groups*.
4. Associate a group with the learning item.
   - Click *Create New Group* to add a new group and associate it with this learning item.

- Click *Add Existing Group* if you already created a group and you want to associate it with this learning item. When you add an existing group, you must review the settings. You can only add existing groups if you are identified as group administrator.

5. Complete the group form.

This Field...	...Is used as follows
Name	This is the name of the group. Choose a name that helps users identify the group or its purpose. To fully explain the purpose, you can use the *Description* box.
Description	Type a description that helps users identify the group.
Group Type	You must select a group type when you add new group. After you add the group, you cannot modify this value. If you select *Private Internal Group*, then people with SAP Jam accounts must be specifically invited to join the group because the system hides this group in searches.
Invite Policy	The invite policy determines who can invite other people to the group. To be invited to join the group, the person must have an account for SAP Jam.
Send Invitations	If you want to send notification messages automatically, configure the *Item Jam Group Notification* automatic process (this is typically done during implementation). The application uses your selections for *Send Invitations* as the trigger for sending the invitation notifications. If you select more than one option for *Send Invitations*, then the system sends an invitation for each trigger. However, if more than one trigger occurs (for example, the item is assigned and the user registers) between executions of *Item Jam Group Notification* automatic process, then the system sends only one invitation notification to eligible users.
Edit Email	Click *Edit Email* to modify the subject and body of the invitation notification. When you associate a group with a learning item, the system automatically copies the subject and body from the `JamGroupInvitation` notification template to this association. If you do **not** customize the message, then the system propagates any changes that you make to the `JamGroupInvitation` notification template to this association. However, if you customize either the subject or body, then this association no longer receives the changes that you make to the `JamGroupInvitation` notification template.

6. Click *Apply Changes*.

Next Steps

If you added a group in error, you can click *Remove* to remove it. If you click *Remove*, then the system removes the association between the learning item and the group, but it does not delete the group itself. Users no longer receive invitations to join the group.

5.23.8 Exporting AICC Content

A small set of customers uses Aviation Industry Computer-based training Content (AICC) standards. If you are among these customers, you sometimes need to export your computer-based training files so that you can have them locally.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item with the AICC content that you want to export.
3. In *Actions*, click *AICC Export*.
4. In *AICC Export*, type a name for the archive that SAP SuccessFactors Learning creates.
5. Click *Create Export Files*.

Results

SAP SuccessFactors Learning creates the files as an archive and you download them through your browser. You have a local copy of the files.

5.23.9 Assigning Learning Items Directly to Users

Launch Manage Assignments from the learning item to assure that you're assigning the correct learning item to users.

Context

You can assign learning items to users in many ways. When you want to assign specific learning item to individual users, the most convenient way is User Needs Management. If you want to assign **one** learning item to many users, we recommend that you open the learning item, verify that it's the correct learning item, and then choose *Assign*. When you do it this way, you avoid searching for the learning item at the beginning of the wizard and you can be sure that you're assigning the right learning item because you've looked at it before making the assignment.

When you choose *Assign* in the *Actions* menu of *Learning Activities* > *Items*, you launch the Manage Assignments wizard in the second step. Because you're launching it from the learning item, the system selects this learning item in the first step and opens the second step.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to assign.
3. In *Actions*, choose *Assign*.

Results

When you choose *Assign*, you launch Manage Assignments with the learning item already selected in the first steps.

Related Information

Assigning Users to Learning Needs in Bulk [page 324]

5.23.10 Creating Learning Item Overview Pages

Create learning item overview pages to add to the information users get when they select a learning item title.

Context

By default, when users select a learning item title, they see the learning item details, which include the thumbnail, the description, and some actions that depend on the type of learning item (launching on-demand/online courses, requesting schedules for live courses, and so on). Often, this is enough for users to orient themselves to the course.

In some cases, however, you might want to provide additional overview if the description isn't enough. For example, you might want to orient the user to how the learning item fits into a broader effort by your company. When you add overview pages, users see an *Overview* tab on the end-user environment. When users select the learning item title, they first see the *Overview* tab and then they can select *Details* to see the details.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and edit the learning item that should get the new cover page.
3. In *Actions*, choose *Cover Page*.

4. Select a layout for the cover page in *Layout*.
5. To edit a specific language's cover page, select it from *Locale*.
6. To add custom information, choose ( ).

   Use these editing tips:

   - Use the formatting buttons to format the text in the section.
   - To upload images or Adobe Flash content, choose upload buttons. You can upload after the first time you save the content.
   - Choose *Source* to troubleshoot the source code.
   - Choose *Preview* to preview what you have written.
7. To activate the cover page and use it instead of the default cover page, choose *Activate*.

Supported HTML Tags	Supported Attributes	Supported Styles
object, param, iframe, button, embed, a, img, p, b, u, i, table, tr, th, td, tbody, thead, tfoot, div, span, ul, ol, li, em, strong, font, h1, h2, h3, h4, h5, h6, o, br, style, blockquote, map, area, hr, video, source, details, summary, col, colgroup	open, background, name, alt, src, href, onclick, target, class, classid, codebase, version, frameborder, scrolling, allowfullscreen, quality, pluginspage, value, align, border, cellspacing, cellpadding, valign, color, size, style, type, face, colspan, rowspan, tabindex, coords, usemap, shape, bgcolor, width, height, id, sizes, summary, title, start, scope, headers, dir, bordercolor, bordercolorlight, bordercolordark, nowrap, controls	left, top, position, text-align, text-indent, text-justify, text-transform, overflow, border-radius, clear, color, margin, margin-left, margin-right, margin-top, margin-bottom, line-height, list-style-type, background-color, float, font, font-weight, font-size, font-style, font-family, background, background-image, border, border-right, border-left, border-bottom, border-top, border-width, border-style, padding, padding-right, padding-left, padding-bottom, padding-top, list-style, height, width, display, white-space, word-wrap, vertical-align, border-color, text-decoration

5.23.11 Setting the Default Reassignment of Learning Items

You set default reassignment on learning items so that when you add learning items to the content of the curricula, the learning items have a default reassignment and your curricula start with a consistency for all learning items across curricula.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that should get the default reassignment settings.
3. In the *Item Details* tab, go to *Assignments*, and change the initial and retraining basis and numbers.

5.23.12 Adding Pre-Tests and Post-Tests to a Learning Item

Add pre-tests and post-tests to a learning item (a course) so that you can see how users progressed in their mastery of learning objectives.

Prerequisites

Pre-tests and post-tests measure user progress in learning objectives. If you are not using learning objectives then there's nothing to measure. Before you add pre-tests and post-tests to learning items, set up your learning objectives.

You also need to create the exams that you want to use as pre-tests and post-tests.

Context

You often want to compare users' knowledge before they attended a course to after they attended a course. If the majority of users show growth, for example, then you know that the learning item (course) is serving your users well. By adding pre-test and post-tests to learning items, users get the tests as an assignment so that you can measure progress.

Pre-test and post-test evaluations are different than adaptive exams. Adaptive online exams change the content of the learning item based on users' performance in an exam. Pre-tests and post-tests don't affect the content. They simply help you evaluate the effectiveness of the course.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to evaluate with pre-tests and post-tests.
3. Go to *Online Content*, click *Add Assessment* , and then search for the desired Exam that you want to use for the pre-test/post-test. Ensure that you have selected an Exam, since only exams will be available to be selected as Pre and Post Tests.
4. Go to the *Surveys* tab. Depending on how your administrator environment is configured, you might need to select **More** to see Surveys.
5. In **Learning Evaluation: Mastery of Content**, select the pre-test and post-test that you added in Online Content.
6. Click *Apply Changes*.

Next Steps

You can check how users progressed between their pre-tests and post-tests by running the *Learning Evaluation* report. Go to *Reports*.

5.23.13 Adding Documents to Learning Items

Add documents to learning items when they support the delivery or design of a learning item.

Prerequisites

Before you add documents to learning items, add the documents to SAP SuccessFactors Learning. Go to *Content* > *Document Links*.

Context

Different customers use learning item (course) documents in different ways. Customers use it to assign reading materials that go along with all instances of a course, Standard Operating Procedures (SOP) that apply to the teaching material, and forms that go with all instances of the course.

Procedure

1. Go to SAP SuccessFactors Learning > *Learning Activities* > *Items*.
2. Find and open the learning item that you want to change.
3. Choose *Document Links*.
4. In *Add a Document Link to the Item*, choose *add one or more from list*, search for the document, and add it.
5. If the document needs to be reviewed, select *Needs Review*.

   A document's review status appears only to administrators and can't be viewed in the user interface. Because the system doesn't send notifications when a document needs review, we recommend that you notify the appropriate person directly.
6. Choose *Apply Changes* to save any changes you have made.

Related Information

Why you Might add Documents to Courses or Classes [page 465]

5.24 Learning Item Details Fields

Learning item details fields contain the basic information for SAP SuccessFactors Learning items, which are the core unit learning.

In *Learning Item Details*, you can view or edit the settings for a learning item. From *Actions*, you can choose *Schedule* to create a new class that is based on the current learning item.

Learning Item Details Fields

This Field...	...Is used as follows
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.
Approval Date	In the *Approval Date* box, you can select the date that the most recent learning item revision was approved. This information is for administrative purposes only and can't be viewed in the user interface.

This Field...	...Is used as follows
Approval Process ID	If you associate the learning item with a default approval process, then you must also select the *Approval Required* check box for the system to initiate the approval process. If you identify an approval process, then all steps in the approval process must be completed before the user can register for a class or launch the learning item. You can create or modify an approval process in the Approval Process section (*References* > *System Administration* > *Approval Process*).
Approval Required	When you select the *Approval Required* check box, the system requires all users who are associated with the approval process that you selected in the *Approval Process ID* list to complete the entire process before users can access this learning item.

This Field...	...Is used as follows
Approved	When you select the *Approved* check box, you're indicating that you approve the learning item. This check box is intended for informational purposes only and can't be viewed in the user interface. **Note** You don't have to approve learning items for the system to use them; however, they must be active.
Approved By	In the *Approved By* box, you can type the name of the person who approved the most recent learning item revision. This information is for administrative purposes only and can't be viewed in the user interface.

This Field...	...Is used as follows
Assignment Type ID	If you associate an assignment type with the learning item, then the system displays the assignment type in the user interface so that users know whether the learning item is required. You can create or modify assignment types in the Assignment Types section (*References* > *Manage User Learning* > *Assignment Types*). **Note** If you select **Required** for any learning item that is associated with a curriculum, then users must complete all **required** learning items in the curriculum before the system grants credit for the curriculum.
Audience	In the *Audience* box, you can enter a description of the intended target audience that the system displays in the user interface.

This Field...	...Is used as follows
Auto Fill Registration	If you select the *Auto Fill Registration* check box, then the system automatically selects the *Auto Fill Registration* when you create a new class for this learning item.
Classification	When you add a new learning item, you select a classification (Instructor-Led, Online, Online with Instructor-led, or Other). After you create a learning item entity, you can't **manually** select a different learning item classification; however, if you add online content to an instructor-led learning item, for example, then the system automatically changes the learning item's classification from instructor-led to instructor-led with online content. As an administrator, you can use the learning item classification as a filter in searches and reports.

This Field...	...Is used as follows
Comments	We recommend that you use the *Comments* box to identify the purpose or intent of the entity. You can also include any information that you think other administrators might need or find useful for understanding the entity and how to use it. For example, if you're working with a user entity 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 a learning item or class entity, you can note why you created or modified the entity. All comments are intended for administrators only and can't be viewed in the user interface.

This Field...	...Is used as follows
Contact Hours	Most customers don't record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use contact hours. Contact hours are the total number of hours that you expect a user to have contact with an instructor. For example, if you set up a learning item that is instructor-led with online content for 8 total hours and, for 6 of those hours, you expect the user to be in an instructor-led time slot, then the contact hours equals 6.

This Field...	...Is used as follows
Contact's Email	The course contact is the email address of a learning scheduler for the course: someone who is responsible for maintaining the course and scheduling it into classes. For simplicity, most customers use a single email address for all courses and make the email address a common address for all schedulers. For example, a distribution list. Consider a distribution list even if you have only one scheduler so that you can change the recipients later without updating all courses. SAP SuccessFactors Learning notifies the person about issues with the course. For example, the contact receives notifications when the amount of class requests is equal to or greater than the minimum enrollment of the course so that the contact can create a new schedule.

This Field...	...Is used as follows
CPE Hours	CPE is an abbreviation for Continuing Professional Education and refers to learning activities that users perform to maintain and expand the skills that their profession demands. Some customers in some industries use CPE hours for certification. If you are in an industry that uses CPE hours for certification, please use the *CPE Hours* field instead of credit hours or contact hours. If you are not in an industry that uses hours to certify employees, you can ignore CPE hours.
Create Date	For administrative purposes only, you can select a date that you created this learning item entity.

This Field...	...Is used as follows
Credit Hours	Most customers do not record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use credit hours. Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. universities, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equals 45; however, the college grants 3 **credit hours** for this class.
Description	Because the content of this box appears in the user interface and in reports, we recommend that you enter a description that helps users identify the entity or its purpose.

This Field...	...Is used as follows
Do Auto Competency	If the learning item is associated with a competency and that competency has a default rating, then the system records that default rating on the user's entity for that competency when a successful history record is added (for example, the user completes the learning item successfully or an administrator or manager adds a history record). **Note** If you select the *Do Auto Competency* check box, then the system automatically selects the*Automatically Assess Related Competencies* check box in the *Add Learning History* wizard.

This Field...	...Is used as follows
Enable Orders	When you select this check box, the system allows the user to choose *Order* to submit an order for the learning item in the user interface. If you clear this check box, then the system still allows a user to choose *Order* in the user interface if the learning item has a price associated with it in one of the user's libraries; otherwise, the system hides the *Order* button in the user interface.
Enable User Requests	If you select the *Enable User Requests*

This Field...	...Is used as follows
Image URL	If you set the showItemThumbnailPhotosGlobally property to *true* in the LMS_ADMIN configuration ID (▶ *System Administration* ▶ *Configuration* ▶ *System Configuration* ▶), then you can enter a valid URL in the *Image URL* box to improve the overall appearance of the library and learning item details page and improve findability of courses by providing a visual element such as logos. **Note** Images URLs must be publicly available, and can't require authentication to view.

This Field...	...Is used as follows
Include User Ratings from Previous Revision	If you select *Yes* from the *Include User Ratings from Previous Revision* list, then the system includes the values of the ratings from the previous revision of the learning item when it calculates the simple average to display to users. If you select *Yes* for all revisions, then the system uses all user ratings to calculate the simple average. If you select *No* for one of the revisions, then the system uses all the ratings up to that revision, but not before it.
Initial Basis	If you select *Calendar*, then the system uses a specific date to calculate a time period during which users must complete the learning item. If you select *Event*, then the system uses the last notable event (in this case, the assignment date) to determine when users must complete the learning item.

This Field...	...Is used as follows
Initial Number	The initial number is the number of days, weeks, months, quarters, from the time that learners are assigned a course to the time that it becomes overdue. The initial period sets the unit (days, weeks, and so on) for this course. For example, if you set the initial number to 30 and the period is days, then this course is overdue if learners do not complete it after 30 days from assignment.
Initial Period	Initial period defines the unit for initial number. Select days as the unit because it is standard. If the initial number is 30 and you select days, then this course becomes overdue 30 **days** after it is assigned to learners if it is still incomplete.

This Field...	...Is used as follows
Initial Required Date Basis	A required date basis can be either an assignment date or a hire date. If it is assignment date, courses become overdue if they are not completed within the time defined by the course's initial number and period after the **assignment date**. If it is hire date, then courses become overdue if they are not completed within the time defined by the courses initial number and period after a learner's **hire date**. Most companies use assignment date. Examples: • If you choose assignment date for initial required date basis, 30 for the initial number, and days for the initial period, then learners who do not complete the course 30 days after the **assignment date** see that the course is overdue. • If you choose hire date for the initial required date basis, 30 for the initial number, and

This Field...	...Is used as follows
	days for the period, then learners who do not complete the course 30 days after their **hire date** see that the course is overdue.
Instructor Materials	For administrative purposes only, you can enter a list of materials that instructors might need to deliver this learning item.
Item Goals	In the *Item Goals* box, you can type what you want users to learn or accomplish as a result of completing this learning item.
Lesson	In the *Lesson* box, you can type any relevant information (for example, a valid URL to an online lesson plan or a name of a training document) for administrators or trainers to consult for the learning item. This information is for administrative purposes only and can't be viewed in the user interface.

This Field...	...Is used as follows
Managers can Add to Learning History	You can, for individual courses, allow managers to post completion status for direct reports. For example, if a direct report shows their manager a completion certificate, the manager can post that completion to the Learning Management System (LMS). The ability and behavior of the process can be controlled globally: • If a security role is missing the permissions to post learning, then regardless of the individual course setting, the users in the role can't post completion. • If an HR Administrator or System Administrator sets an approval process for the posting of events, then any posting must follow the approval process before it's final.

This Field...	...Is used as follows
Maximum Registration	Maximum registration is the maximum amount of learners who can be enrolled before SAP SuccessFactors begins adding users to the waitlist. You often set a maximum enrollment because of the size of the training location. The classroom, for example, might hold 20 learners. In that case, the maximum enrollment is 20. When the twenty-first person tries to enroll, that person goes onto the waitlist. Set maximum registration on the course (learning item) and allow the class to inherit it. If the course is usually held in the same location, the maximum registration on the course is useful because it populates the maximum registration in the class. If the course is held in many locations, you change the inherited value. For virtual classes (VLS) set the maximum enrollment to a reasonable number so that the instructor isn't overwhelmed. Online courses don't use maximum registration.

This Field...	...Is used as follows
Method ID	If you associate a delivery method with the learning item, then the system displays the method in the user interface so that users know how the learning item will be delivered (for example, a book, PDF file, or online course). As an administrator, you can use the delivery method as a filter in searches and reports. You can create or modify method IDs in the Delivery Methods section (*References* > *Learning Activities* > *Delivery Methods*).

This Field...	...Is used as follows
Minimum Registration	Minimum registration is the minimum amount of learners who must be enrolled for the course to take place. For example, you can decide that you need at least five people enrolled or you'll cancel the class. Minimum registration is a part of class requests. If you enable class requests for the course and if enough people request the course to meet minimum enrollment, then SAP SuccessFactors Learning sends an email to the address for the course contact to tell them to schedule an additional class for the course. Set minimum registration on the course (learning item) and allow the class to inherit it. In a class, the minimum registration is informational: SAP SuccessFactors does **not** use it. You can use it in a class, however, to see whether the class has met its minimum enrollment.
Rating	From the *Rating* list, you can select a rating (0.50 to 5.00) that you can use to identify the learning item's complexity.

This Field...	...Is used as follows
Prevent Multiple Class Registration Interval	Using a registration interval prevents learners from enrolling into duplicate classes over a time period. It prevents learners from over-enrolling. For example, if the interval is 30 days, then learners can't enroll into two classes of this course in the same 30-day period. If the course is Cardiopulmonary Resuscitation (CPR) Certification, and it's scheduled as a class every seven days, a learner who enrolls into a November 1 CPR Certification class must wait until after December 1 to enroll into another course. By forcing individual learners to enroll into courses that are 30 days apart (this example), you prevent those individuals from over-enrolling and crowding out other learners who need the course. You can override this setting by enabling *Administrators or Managers can override the Prevent Multiple Class Registration Interval* in *System Administration*

This Field...	...Is used as follows
	Application Administration > *Registration Settings* >. → Tip To prevent learners from registering for the same course again, set the registration interval to **99999**.

This Field...	...Is used as follows
Require E-Signature	When you enable electronic signatures, you force the system to prompt administrators, users, instructors, or others for an ID, a PIN, and sometimes a meaning code to proceed with a process (for example, adding a history record, submitting a performance review, or submitting a competency assessment) that requires an electronic signature. As an administrator, if you forget your PIN, then we recommend that you contact your administrator, who can reset it on the *Summary* tab of your administrator entity (*System Administration* > *Security* > *Administrators*). **Note** You must globally enable electronic signatures (*System Administration* > *Configuration* > *Global Applications Settings*) to enable this control.

This Field...	...Is used as follows
Retraining Basis	If you select *Calendar*, then the system uses the completion date to calculate a time period during which users must complete the learning item again. If you select *Event*, then the system uses the last notable event (in this case, the completion date) to determine when users must complete the learning item for retraining. This value defaults when the item is associated to a curricula.
Retraining Number	In the *Retraining Number* box, you can enter the number of days, weeks, months, quarters, or years (whichever value you select in the *Retraining Period* list) after a user completed the learning item that they must complete it again. This value defaults when the item is associated to a curricula, and can't be NULL.

This Field...	...Is used as follows
Retraining Period	In the *Retraining Period* list, you can select a period of time (days, weeks, months, quarters, or years) that corresponds to the value in the *Retraining Number* box. This value defaults when the item is associated to a curricula.
Reviser	In the *Reviser* box, you can type the name of the person who most recently revised the learning item. This information is for administrative purposes only and can't be viewed in the user interface.
Safety Related	You can select the *Safety Related* check box to flag the learning item as safety-related in searches and reports. This information is for administrative purposes only and can't be viewed in the user interface.

This Field...	...Is used as follows
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Shipping Required	When you select the *Shipping Required* check box, you indicate that the learning item contains shippable materials. In the user interface, the system prompts users to enter a shipping address when they access the learning item.

This Field...	...Is used as follows
Source	If you associate a source with the learning item, then the system displays the source in the user interface so that users know the developer of the learning item or the organization or regulatory body that requires it. As an administrator, you can use the learning source as a filter in searches and reports. You can create or modify source in the Sources section (*References* > *Learning Activities* > *Sources*).
Title	A course title appears to users and to recommendation logic to help them understand what a course is about. Good titles help users understand what to expect in a course and help recommendation logic make a good recommendations. Write a simple, direct title.

This Field...	...Is used as follows
Users can Add to Learning History	You can, for individual courses, allow users to post completion status for themselves. For example, if users attend a course and have a completion certificate, they can post that completion to the Learning Management System (LMS). The ability and behavior of the process can be controlled globally: • If a security role is missing the permissions to post learning, then regardless of the individual course setting, the users in the role can't post completion. • If an HR Administrator or System Administrator sets an approval process for the posting of events, then any posting must follow the approval process before it's final.

This Field...	...Is used as follows
User can Rate	If you enable user ratings and the system adds a history record (for example, a user completes a learning item, or a manager or administrator adds a history record), then the system allows any users who completed that learning item to rate the learning item by placing a *What Did You Think* pod on the home page (just above the *Library History* tile). If users choose *Dismiss*, then the system removes the learning item from the pod, but still allows users to rate the learning item from the Completed Work area. Users can rate or revise any rating for these learning items by accessing the Completed Work area of the application. When other users find the rated learning item in a library search or view the details for a learning item, the system shows the average of all user ratings for that learning item. The system shows the simple average: sum of all ratings divided by the number of all ratings.

This Field...	...Is used as follows
	Note You can have the system include ratings from previous revisions by selecting *Yes* from the *Include User Ratings from Previous Revision* check box, then the system allows users to request a class of this learning list.

This Field...	...Is used as follows
Users can Waitlist	If you select the *Users can Waitlist* check box, then the system places users on a waitlist if they attempt to self-register in a class for this learning item *after* the system exceeds the value in the*Maximum Registration* box (*Learning Activities* > *Classes* > *Details* check box, then the system). If you enabled auto fill registration on the class entity, then the system automatically replaces users who withdraw from the class with users who are first on the waitlist. After a user withdraws from the class, the system determines who to enroll next from the waitlist using the user's registration date and time. If *Users can waitlist* is set to true, when creating a new Class, the *Users can waitlist* will be true at the class level. **Note** In *Email Notifications* (*Learning Activities* > *Items* > *Email Notifications*),

This Field...	...Is used as follows
	you can configure the waitlist and waitlist removal email notifications that the system sends to users when they're added or removed from the waitlist.
User Materials	For administrative purposes only, you can enter a list of materials that users might need to take this learning item.

5.25 Learning Item Classifications

Learning items (courses) in SAP SuccessFactors Learning have a classification that defines the behavior of the course.

This Classification...	With this ID...	Means...
Blended	BLENDED	The course has some online segments and some classroom segments. For example, if users spend the first half a day in Computer Based Training (CBT) and the remaining half of the day in a classroom with an instructor, then the course is blended.
Online	CONTINUOUS ONLINE ACCESS	The course is completely online and users can launch it at any time. This type of learning item does not need to be scheduled into a class.
External-Course	EXTERNAL-COURSE	The course is online and is hosted at an Online Content Network (OCN) provider's site. You see this classification if you have implemented OCN connections.

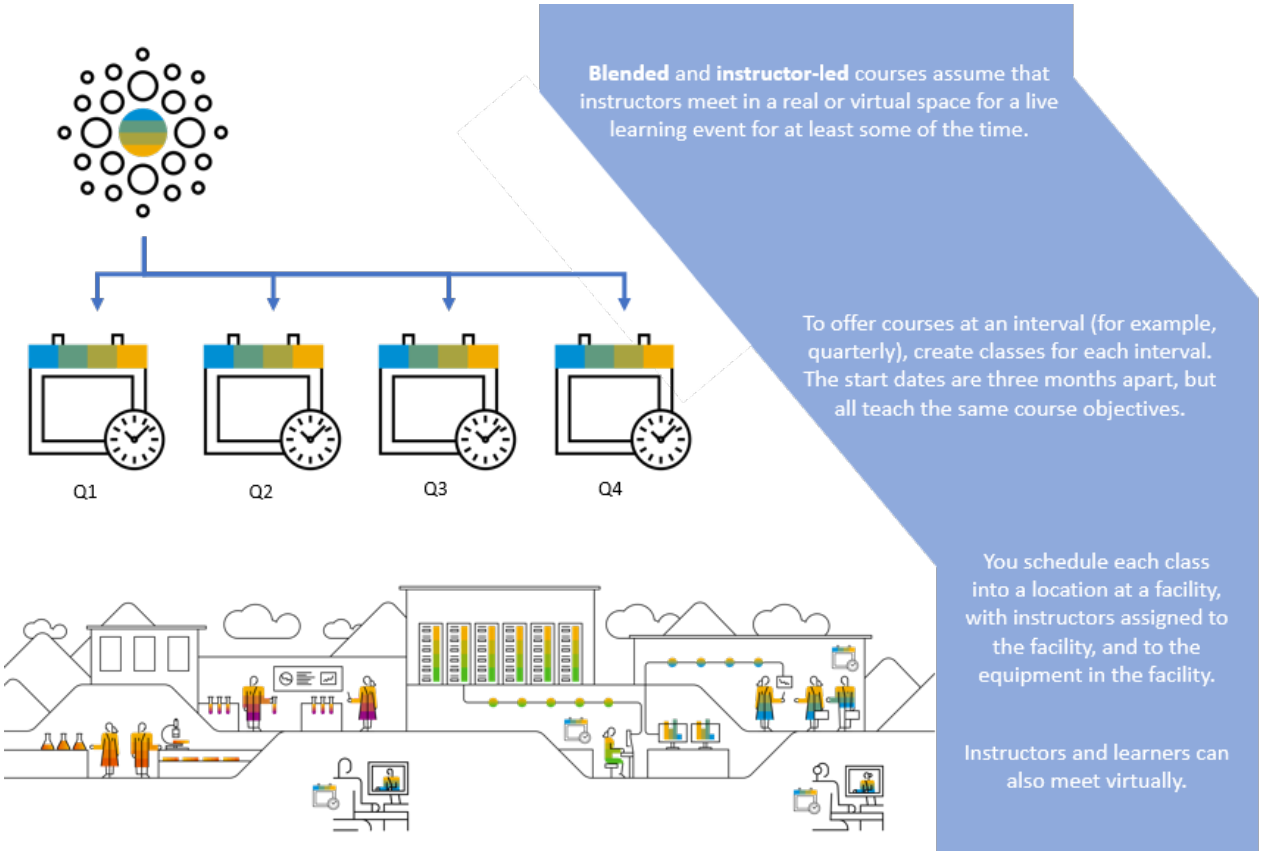
This Classification...	With this ID...	Means...
Other	PHYSICAL GOOD	The course is something physical like a book that is shipped to users. This classification is also used for task checklists, which are a test to observe someone successfully compelting a task.
Instructor-Led	TIME-BASED	The course is a traditional classroom course with an instructor teaching participants. The course can meet in a physical location (a classroom in a building) or a virtual meeting room.

6 Scheduling Courses into Class Times and Locations

Schedule courses into class times and locations when you have instructor-led segments in courses and you want to schedule them to take place at a time, a place, and with instructors.

After you create courses, you schedule them into classes so that they appear in your learning calendar and learners and enroll into the classes. When you schedule courses you define times for the class to meet, places for them to meet, and resources that they need. For example, you can schedule a course to meet every quarter. Each quarter can meet in a different place with different instructors and equipment. And each class meets three months apart.

> **Note**
>
> Technically, you define times, locations, and resources for **segments** within the class.



Scheduling Courses into Classes

6.1 Class Requests

Learners can make class requests when they see a course that they need but it isn't scheduled for a convenient time or it isn't scheduled by a deadline that they need a course. If enough learners request a class, a learning administrator can schedule a class.

You have a set of courses in your system and you often schedule them once a year. For example, you can meet with other administrators in November and December and create a learning calendar for the upcoming calendar year. You can predict popular courses and schedule them more frequently, but some small number of courses will be more popular than you predicted. Class requests give your learners the opportunity to express interest in a course, to express that it's popular, so that you can adjust your calendar and schedule more instances of the course.

For example, when you create your calendar in November and December, you might schedule a course about management leadership for classes to occur every two months (January, March, May, July, and so on). The classes might have a maximum enrollment of ten learners. If the classes prove popular, however, you might leave people on the waitlist and additional users might see that registration is closed and want to request another class.

When you enable class requests, SAP SuccessFactors Learning requests a new class of the course on behalf of users who are left on the waitlist and allows users who never made it onto the waitlist to request a new class by clicking a button.

6.1.1 Viewing Learner Class Requests

View learner class requests if a learner contacts you about a class that they need, you have enabled class requests, but the request is unfulfilled.

Context

If you enable class requests, learners can request a class of type instructor-led or blended. Those types of courses have some scheduled time where a learner must be present with an instructor. If learners need the course but cannot find a class that is offered in their geographic area or at a convenient time, they can submit a request for the class to be scheduled at a more convenient time. Their request appears in their learner profile and also with the course that they request.

> **Note**
>
> Requests can change if learners withdraw the request, if you remove it from the course, or if learners complete the course.

Procedure

1. Go to Learning Administration and then go to *People* > *Users*.

2. Find and open the learner who you want to investigate.
3. Go to *Requests*.

Next Steps

If you do not see enough information with the request to help you schedule the offering, go to the learner's profile and then click *Actions* > *Send Notification* to request more information.

6.1.2 Viewing Class Requests by Course

View class requests for courses to see who has requested a class of this course.

Prerequisites

Although it isn't required, you usually run the *Item Requests* report first to see all the learning items with requests. Then, when you see a learning item with many requests, you open that learning item in *Learning Activities* > *Items* to see the requests for that individual learning item.

Context

If you enable class requests, learners can request a class of type instructor-led or blended. Those types of courses have some scheduled time where a learner must be present with an instructor. If learners need the course but cannot find a class that is offered in their geographic area or at a convenient time, they can submit a request for the class to be scheduled at a more convenient time. Their request appears in their learner profile and also with the course that they request.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that has been requested.
3. Go to *Requests*.
4. Click *Comments/Reason* to see why learners are requesting the course.

Next Steps

If you see enough requests to add a new class of this learning item, go to the learning item, then go to *Actions* > *Schedule* to add a class to accommodate the users. When you enroll them into the new class, they are automatically removed from *Requests*.

6.1.3 How Class Requests are Made and Resolved

Learners make class requests themselves, through managers, or through learning administrators. They're resolved by registering learners into courses or learners completing the course.

> → Tip
>
> If you add or remove a request on a user's behalf, notify the user **after** you add or **before** you delete a request by selecting the *Send Email Notification* check box and clicking *Apply Changes*.

How Users are Added

Learners or their managers can request classes if they see a course but can't find it scheduled at a convenient time or location. When users request, they add comments to explain why they need the learning item and they can enter a date by which they need to take the course.

As an administrator, you can also add or remove a request on learners' behalf by opening the item and adding the request directly in *Class Requests*.

How Class Requests are Resolved

If you respond to class request by registering learners for courses, SAP SuccessFactors removes class request because the request is fulfilled. If you post a learning event for the user, then SAP SuccessFactors removes the class request because it's fulfilled. Finally, users can withdraw their requests.

6.1.4 Class Requests Fields

When learners submit a class request, their request is stored with information that helps you fulfill the request.

Field	Description
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 scheduled offering record, you can note why you created or modified the record. All comments are intended for administrators only and can't be viewed in the user interface.
Need By Date	When you add a request for one or more users, you can select a date in the *Need By Date* box to indicate by when other administrators must register users for a scheduled offering of this item. After you select a need by date, the system displays this information in the user interface when users access the registration details.
Request Date	When you add a request for one or more users, the system automatically populates the *Request Date* box with today's date; however, you can select a different request date at any time. After you select a request date, the system displays this information in the user interface when users access the registration details. Need By Date.
Request Reason	In the *Request Reason* box, you can manually enter the reason why you requested the item on a user's behalf; however, if you added one or more common reason requests on the Request Reasons area (*Learning Activities* > *Items* > *Request Reasons*), then the system prepopulates the *Select Reason Request* list so that you can select a common request reason. After you either enter or select a request reason, the system displays this information in the user interface when users access the registration details.
User ID	If you want to request the item on a user's behalf, then you can enter a user's name in the *User ID* box or click the *add one or more from list* link to add requests for multiple users. If you add requests for multiple users, then you can select different *Request* and *Need By* dates for each user.

6.2 Adding Recurring Classes

Add a recurring class so that it repeats on an interval and your employees have multiple opportunities to enroll into it.

Context

When you plan your course calendar, you might want to add recurring classes to offer the same course on a set interval. If a class recurs on a set interval, learners can predict the schedule. For example, you want the same company orientation class to reoccur for your new employees monthly so they can enroll in any month. While the course content is the same every month, other details such as the roster, schedule, location, and instructor might change.

Procedure

1. Go to Learning Administration, and then go to *Learning* > *Items* to add a course.
2. Go to *Learning Activities* > *Classes* to add the first class of the course.
3. In *Learning Activities* > *Classes*, click *Actions* > *Copy*.
4. Use the recurrence options to define the interval of the class.

> → Tip
>
> Select a reasonable end date for the recurrence to control change management. For example, you might add monthly classes and conclude them at the end of the calendar year.

Related Information

Creating Instructor-Led Courses [page 35]
Creating Online Courses [page 45]
Creating Instructor-Led with Online Content Courses [page 74]
Creating Other Items [page 65]
Copy Class Recurrence Options [page 188]

6.2.1 Copy Class Recurrence Options

This topic describes the options you have when copying a class to create a recurring course or a single course based on an original class.

This Field...	...Applies to Recurrence Scenario...	...And is Used in the Following Way
New Start Date	All	When you copy a class, you must provide a new start date, which can be before or after the start date of the existing class. If you create multiple classes, then the system uses this date as the start date of the first class that it creates and then adds the appropriate number and period (that is, day, week, month) for each successive class that it creates.
Schedule On	Single: No Recurrence	You can use the *Schedule On* checkboxes to identify the days of the week that the system can use to create classes and their time slots.
Override adjusted registration close date	Single: No Recurrence	If you deselect the *Override adjusted registration close date* checkbox, then the system copies an adjusted closing date from the existing class. That is, the system calculates the difference between the registration close date and the start date of the first time slot of the existing class (let's call this DATE_DIFF). The system then creates the new class (based on the parameters you identified), then subtracts DATE_DIFF from the start date of the new class, and finally uses that value for the *Registration Close Date* for the new class. If you select the *Override adjusted registration close date* checkbox, then the system enables the *Close Date*, *Time*, and *Time Zone* fields.
Scheduled every	Daily, Weekly, and Monthly	You can use the *Schedule every* field to set the number of time periods to skip between the starting date of each successive class that the system creates.

This Field...	...Applies to Recurrence Scenario...	...And is Used in the Following Way
End after (schedules)	Daily, Weekly, and Monthly	If you select *End after* for schedules, then the system uses the value that you provide to determine how many classes to create.
End after (date)	Daily, Weekly, and Monthly	If you select *End after* for a date, then the system uses the date that you provide to determine how many classes to create. Based on the other values that you provide, the system creates a class if the start date for a new class is on or before the date that you provide.
Include Registration Close Date	Daily, Weekly, and Monthly	If you select the *Include Registration Close Date* checkbox, then the system copies an adjusted closing date from the existing class. That is, the system calculates the difference between the registration close date and the start date of the first time slot of the existing class (let's call this DATE_DIFF). The system then creates the new classes (based on the parameters you identified), then subtracts DATE_DIFF from the start date of each class, and finally uses that value for the *Registration Close Date* field for the new class. Each new class gets its own adjusted closing date. When applying the registration close date in this way, the system will use a date that falls on a weekend day. If you deselect the *Include Registration Close Date* checkbox, then the system clears the values in the *Registration Close Date* and *Registration Close Time* fields for each new class that it creates.
Use the date as the driver to schedule	Monthly	If you select *Use the date as the driver to schedule*, then the system starts every new class on the same day (for example, 4th, 15th, or 23rd) of the month that you identified in the *New Start Date* field.

This Field...	...Applies to Recurrence Scenario...	...And is Used in the Following Way
Use the day and week as the driver to schedule	Monthly	If you select *Use the day and week as the driver to schedule*, then the system starts every new class on the same week of the month and day of the week that you identified in the *New Start Date* field. The system doesn't use something like "Fifth Monday." Instead, it selects the week first, and then the day. Therefore, if the first day of the month happens to be a Friday, for example, then the system counts that as the first week, which means it creates a new class on the "Fourth Monday" of that month because it's the fifth week on Monday.

6.3 Using an Existing Class as a Template for a New Class

Copy a class to use it as a template for a new class you want to create.

Context

You can copy classes to duplicate them and make a recurring class based on that single instance. For example, if you create a single Cardiopulmonary Resuscitation (CPR) certification class and you want it to recur weekly, you can copy it on a multiple-week basis. The result is duplicate CPR classes, one every week for some period of time.

When you copy an existing class, the system copies the original configuration to the duplicates, with the following exceptions:

- The system does **not** include any registrations in the new copy. Learners who were registered for the original aren't added to the registration list of the duplicates.
- VLS related settings are not included in the new copy. Configurations found in *Details* > *VLS Settings* and *Agenda* are blank regardless of their state in the existing class.
- You can choose to exclude the associated class group from the new copy.
- You can choose to prevent the system from adding the new class to the same libraries as the existing class.
- You can choose to have the new class use the segment day numbers of the item instead of the existing class. When you use the segment numbers from the item, you're following the intentions of the administrator who set up the item and you do **not** copy any exceptions made in the original class.

> **Note**
>
> The maximum number of copies that you can create can't exceed the value of the `scheduleCopiesLimit` property in the LMS_ADMIN system configuration.

Procedure

1. Go to SAP SuccessFactors Learning Administration, go to *Learning Activities* > *Classes*, and then find and open the class that you want to copy.
2. Go to *Actions* and click *Copy*.
3. Select your copy options:

Copy Option	Description
Copy Class Group	Select *Copy Class Group* to associate an existing class with a class group. The system copies the existing class group to the new class. You can verify this association by going to (*Learning Activities* > *Class Groups* > *Classes*).
Copy New Class to the library	Select *Copy New Class to the library* to associate an existing class with one or more libraries. The system associates all of those libraries with the new classes. You can verify this association by going to (*Learning Activities* > *Libraries* > *Items*).
Copy Related Document Links	Select *Copy Related Document Links* to associate legal forms, waivers, or any other ancillary documents that aren't learning materials.
Use item default segment day numbers	Select *Use item default segment day numbers*to ignore the information in the *Segments* area of the existing class and instead use the information in the *Delivery Data* area of the associated learning item. The learning item delivery data represents the ideal delivery data and segments as created by a learning administrator. Sometimes another administrator needs to make an exception. Select *Use item default segment day numbers*, then you copy the ideal segment numbers (as planned). If you don't select *Use item default segment day numbers*, then you copy the segment numbers as delivered to learners in this class.
Copy to consecutive Days	Select *Copy to consecutive Days* if you have a class whose consecutive segments skip one or more days. For example, if you have a class that meets on Monday, Wednesday, Friday. Then you can remove those skipped days for the new classes and run them on consecutive days like Monday, Tuesday, Wednesday.

4. Select a recurrence option and how to end the recurrence.
   - Click *Copy Single* to duplicate the class to occur one time and **not** reoccur.
   - Click *Copy Multiple-Daily Based* to copy the class to multiple classes that reoccur on a **daily** basis. Use this option when you want multiple duplicates and schedule them some amount of working days apart.
   - Click *Copy Multiple-Weekly Based* to copy to multiple classes that reoccur on a **weekly** basis. Use this option when you want multiple duplicates and schedule them some amount of weeks apart.

- Click *Copy Multiple-Monthly Based* to copy to multiple classes that reoccur on a **monthly** basis. Use this option when you want multiple duplicates and schedule them some amount of weeks apart. When creating a monthly recurrence, you can drive the schedule by date or day of week.

5. In *New Start Date*, pick the start date for the copied class.

6.4 Adding Classes

Add classes when you want to schedule a course to take place at a specific time and you want to schedule resources for it.

Prerequisites

An item (course) must have at least one time slot defined on the *Agenda Template* tab before you can schedule a class.

Context

Each class is an instance of a course. For example, you can create a Cardiopulmonary Resuscitation (CPR) course and schedule a class to teach CPR on a Monday, another on Tuesday, and another on Wednesday. All three classes teach the same CPR certification but they're scheduled for different times, could have a different instructor, and could be held in different classrooms.

> **Note**
>
> You can add a new class by going to *Learning Activities* > *Classes*, but we recommend scheduling a class from the item (course) because its saves steps and avoids errors when looking up the course while adding a new class.

Procedure

1. Go to SAP SuccessFactors Learning Administration, go to *Learning Activities* > *Items*, and then find and open the learning item that you want to schedule.
2. Go to *Actions* and choose *Schedule*.
3. In *Type*, verify that *Item* is selected.
4. In *Item Type*, *Item ID*, and *Security Domain*, verify they you're scheduling the correct course.
5. In *Description*, add a description for this specific class.
6. Select *Publish in all associated libraries* to add the class to every library that the course already belongs to.

For example, assume that you have a Lifesaving library of courses and the CPR course is a part of the Lifesaving library. If you select *Publish in all associated libraries* when scheduling the CPR course and you schedule the CPR **class** for May 1, then the May 1 **class** automatically shows up in the Lifesaving library.

7. In *Class Information*, add the details for where and when the class occurs.

   If you have multiple time slots, then this is the start of the first time slot. You could have multiple time slots, for example, if the course meets over three days. Each day is a time slot.

Facility	You can associate the class with a facility (that is, a place that contains one or more locations) so that registered users can view the facility and location of the class in their current registration details. The selection of a facility impacts the *Time Zone* value. You can create or modify a facility in the Facilities section (*References* > *Physical Resources* > *Facilities*).
Primary Location	You can associate the class with a primary location (for example, a room, lecture hall, or laboratory in a building) so that users know where to go in the facility for the class. In the user interface, when users view the details for a registration or for a class, the system shows **only** the primary location for each time slot.
Start Date	The *Start Date* is the date when the first time slot for a class is scheduled.
Start Time	The *Start Time* is the time when the first scheduled time slot for a class begins.
Time Zone	The *Time Zone* should be set to the local time where the class is held. The *Time Zone* value defaults to the administrator's preferred time zone and updates automatically to match the selected facility's time zone. If a facility doesn't have a time zone set, the administrator's preferred time zone displays. **⚠ Caution** Time zones are critical to classes. When browsing a list of classes, users want to see the time that they must arrive and they want to see it in the local time where the class is held. SAP SuccessFactors Learning uses time zones to show course start and end times in local time: the time **in the location** of learners when attending training. To calculate local time, Learning needs time zones for all applicable parts of the schedule and the user. To help you schedule, you should set the time zones too. For example, you set time zones for

	the facility where the course takes place, the time zone of the class, and the time zone of the user.

8. In *Resources*, add the resources for the class.

Primary Instructor	You can associate the class with a primary instructor so that users know who to expect to teach an instructor-led time slot. In the user interface, when users view the details for a registration or for a class, the system shows **only** the primary instructor for each time slot.
Manage Equipment	You can associate the class with only one equipment entity as you add the new class. After you add the class, you can associate it with multiple equipment entities by editing the time slots (*Learning Activities* > *Classes* > *Agenda*).
VLS Server **and** *Password*	When you enable the virtual session for a time slot (by selecting a value from the *VLS Server* list), the time slot information is sent to the selected virtual server, and a corresponding virtual session is scheduled automatically. The system sends an email notification message to all registered users that contains a hyperlink to the virtual session. Users who access this link enter the session using their user ID and password. To restrict access to the course to only registered users or specific nonusers, you can enter a value in the *Password* box that will be required by people without a user entity or nonregistered users. If you select a value from the *VLS Server* list and don't provide a value in the *Password* box, then a registered user could forward the login information for the virtual session to anyone and those people could log in to the session. **Note** The *VLS Server* and *Password* boxes are available only if `<Vle enabled="true" />` in the LMS_ADMIN configuration (*System Administration* > *Configuration* > *System Configuration*). For Microsoft Teams or Webex Meeting Center virtual meeting rooms, the VLS doesn't have an option to set a password for event registration.
Resource Usage View	You can determine if a resource has a scheduling conflict with this class. Select the resource in the *Resource Usage View* and then choose the *Refresh* button.

9. To request information from users who register for this class, choose the *Add* button in *Special Request Custom Fields*.

For example, if you're serving lunch, you might want to ask users for allergies or dietary preferences in a registration form. The information from the form is stored with the class.

10. Choose *Save*.

6.4.1 Adding and Editing Class Time Slots

Add and edit class time slots to divide the class for resource planning.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to edit and then go to *Agenda*.
3. To add a time slot, click + *(Add Time Slot)*.
4. To edit an existing time slot, click ••• *(More)* and then select *Edit Time Slot*.
5. Enter the following time slot information:

Option	Description
Description	Type a *Description* to help other administrators and users to distinguish between different time slots of the class.
Resources	Use the dropdown list on the right side of the Resources header to review the resources identified on the item entity for the effective delivery of the class and add resources. Click *Apply to All Time Slots* to copy resources applied to the time slot that you're modifying to all other time slots of the class.
Virtual	If you enabled virtual learning, you can create virtual time slots to allow users to click a link in their *My Assignments* tile and launch the virtual meeting room. Select *Virtual* to enable a virtual session and select one of the available session types from the *VLS Server* list. After you save, the time slot information is sent to the selected virtual server, and a corresponding virtual session is scheduled automatically. The system sends an email notification to registered users that links to the virtual session. When internal users enter the meeting room through a link in an email message from the LMS or through their My Assignments tile, they're authenticated through the LMS. To allow external users to log in to the virtual meeting room, type a password in *Password*.

Option	Description
	Note Virtual time slots require a primary instructor who has a VLS account and who is authorized to teach the course. Without an instructor with a VLS account, there's no one to start the virtual training session. Additional metrics like total time in the VLS rely on the time that the instructor opens the virtual time slot.

6.4.2 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.

6.4.3 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*.

6.4.4 Copying Time Slots

If you have a multiple day class and its time slots use the same resources, you can save time by copying the time slots or copying its resources.

Context

For example, if you have a five-day course that meets every weekday for a week in the same classroom, with the same instructor, and for the same times, you can create Monday's time slot. Then, you can copy Monday's time slot to create the time slots for Tuesday-Friday.

SAP SuccessFactors Learning schedules the time slots for Tuesday-Friday with all the same resources as Monday's and schedules for the same times.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes* > *Agenda*.
2. Choose *Copy*.
3. In the *Copy Daily Time Slots* dialog, enter the number of times the current time slot should be copied. Then, choose (*Copy*).

6.4.5 Copying Class Segment Resources

Copy the segment resources if you have already scheduled segments that have the wrong resources.

Context

If you scheduled segments, but you scheduled them with the wrong resources, then you can copy the segment resources. For example, if the class has three segments all taught by the same instructor, but the instructor is on vacation that week, you can switch the instructor in the first segment and copy the resources to the other segments. SAP SuccessFactors Learning copies the instructor and the other resources from the first segment to the other two.

> **Note**
>
> When you copy resources, SAP SuccessFactors Learning copies all resources. If you have purposefully switched a resource in a later segment, overwritesSAP SuccessFactors Learning it with the copied resource.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes* > *Segments*
2. Click *List View* ( ).
3. Click any segment to open the *Edit Segment* box.
4. Click Add to add resources.
5. To remove resources from the segment, select *Remove*.
6. Click *View Suggested Resource Types* to see the resources that SAP SuccessFactors Learning suggests based on the current learning calendar.

6.4.6 Adding Contacts to Classes

Add contacts to classes so that they receive the same registration, cancellation, withdrawal, and waitlist notifications that the system sends to users, supervisors, and instructors in the class.

Context

Messages about registration, cancellation, and other statuses go to the learners, supervisors, and instructors of a course, but you might also want to copy some users on the notifications for some classes. You can add those people as **contacts** of the class.

> → Tip
>
> Go to *Learning Activities* > *Classes* > *Notifications* to configure and edit the registration, cancellation, withdrawal, and waitlist notifications that the system sends to the contacts you specify on this tab.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to add the contacts to.
3. Go to *Contacts*.
4. Click *add one or more users from list* or *add one or more instructors from list* to find and add people to copy on the notifications.

6.4.7 Adding Materials to Classes

Add materials to classes to identify materials that should be brought to the class.

Context

A few customers use materials for classes so that they can track consumable goods and their costs. Many customers simply have a standard set of materials that they assume to be in the classrooms - such as computers, projectors, and so on.

> ⓘ Note
>
> Classes inherit their materials from courses when you first create the class.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to add the materials to.
3. Go to *Materials*, and then click *add one or more from list*.
4. Find the material that you want to add and add it to the course.
5. Set the type of work, the offset days, the target user, and the quantity.

Option	Description
Type	Identify whether you want users or instructors to receive the material before (*prework*) or after (*postwork*) the class.
Offset	If you select *prework*, then type a number of days that the material should arrive before to the class start date. If you select *postwork*, then type a number of days that the material should arrive after the class ends.
Target	Identify whether users or instructors should receive the material. For example, if it is an instructor handbook, select *Instructor*. If it is a participant handbook, select *Users*.
Quantity	Type the amount of the material that users or instructors should receive. For example, each instructor or learner should receive **one** textbook.

6. Click *Apply Changes*

6.4.8 Adding Document Links to Classes

Add document links to classes so that users can access the information in the user interface.

Context

A few customers use document links for classes so that they stay with the class. Many customers simply distribute the documents to instructors that teach the class and keep copies at their training facilities.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to add the document links to.
3. Go to *Document Links*.

6.4.9 Class Time Slots

Class time slots reserve instructional resources for a block of time.

A time slot is a block of time for which a location, instructor, and equipment can be assigned and reserved. A class inherits its time slots from its course (learning item). When you add a new class, we copy the time slots from the course level.

For example, a course might span two days. The first day might be in a classroom and the second day might be in a lab. You can split the course into two time slots: a classroom time slot with a classroom location and instructor and a second time slot that takes place in a lab and with a different instructor.

In *Learning Activities* > *Classes* > *Agenda*, you can see the time slots that the class inherited from the learning item. You can also add a new time slot to the class by choosing + *Create Group*. Although it is uncommon, you can also override the amount and duration of the time slots by choosing ••• *More* and *Edit Time Slot*, but this can happen if there is a resource conflict in which the resource that a time slot needs is already scheduled. For example, two classes might inherit the same classroom. You can copy an existing time slot instead of creating one.

6.4.10 Finding the Courses Scheduled into a SAP SuccessFactors Learning Location

Find the courses scheduled into a location if you want to know how your locations are utilized.

Context

You often want to find the courses that are scheduled for your training locations so that you can see how often they are utilized. Although you can go to *References* > *Physical Resources* > *Locations* > *Scheduling* to see the list of segments in one scheduled offering, we recommend that you run the Location Utilization report to see multiple locations at once and to narrow your results by date range.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Reports*.
2. In *Search*, type **`Location Utilization`**.
3. Click *Location Utilization (CSV)* to run the report.

   You can also run the report in HTML or PDF, but CSV allows you to open it in Microsoft Excel so that you can use the data features to analyze the location data.
4. Download the .csv file after the report runs and open it in Excel.

Related Information

Learning Locations [page 527]

6.4.11 Finding a SAP SuccessFactors Learning Facility Manager

Find a SAP SuccessFactors Learning facility manager when you have questions about the resources at a facility.

Prerequisites

Often, you need to contact a facility manager to check on equipment or locations at a facility. You can look up facilities by equipment and locations, but it helps to know the unique ID of the equipment or location and some additional information like a contact name for the equipment or the location type (a classroom or a lab, for example). This information helps you communicate with the facility manger.

- To look up information about equipment, log in to SAP SuccessFactors Learning Administration and go to *References* > *Physical Resources* > *Equipment* > *Summary*.
- To look up information about locations, log in to SAP SuccessFactors Learning Administration and go to *References* > *Physical Resources* > *Locations* > *Summary*.

Procedure

1. Log in to SAP SuccessFactors Learning Administration and then go to *References* > *Physical Resources* > *Facilities*.
2. To look up facilities by a piece of equipment or a specific location within facilities, choose *Add/Remove Criteria*, and then select *Equipment Type* and *Facility*.
3. To look up facilities by their geographic location, choose *Add/Remove Criteria*, and then select *Location Type*
4. Enter your search parameters and then click *Search*.

   If you know the facility ID, that is the most accurate search parameter. However, you often know the region of the facility or you know the equipment or location (classroom). Use the filters to narrow your search to the correct regions, equipment, or locations. For example, to search for all facilities with a lab in North America, you can filter by locations of type “Lab” and filter by the region “North America”.
5. Locate the facility in the search results and open it.
6. Refer to *Contact Name* and *Contact's Email*.

6.5 Tips for Managing Classes and the Class Workspace

You often work with many classes so managing your class workspace can make finding and managing courses easier.

Your class workspace is in *Learning Activities* > *Classes*. We include some tools for helping you manage your classes and your workspace, for managing class rosters and instructors, and closing classes.

- You can group classes into *Class Groups* so that they are easier to find. For example, if you are responsible for all classes in a region, you can add them in group instances.
- You can take quick actions on common tasks like getting a class roster for instructors or closing a class in *Actions*.
- You can communicate quickly with all members of a class. This is common when, for example, a room changes at the last minute.

6.5.1 Creating Class Groups

Create class groups to create a set of classes that have the same trait: classes that you own, classes in the same region, and so on.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Class Groups* and then click *Add New*.
2. Add the basic information fro your class group.

Option	Description
Class Group ID	Follow your company ID naming standard if you have one.
Description	Explain to other administrators what these offers have in common.
Curriculum	Select a curriculum that you want to associate with the class group.
Projected Start Date	You can select a start date for the class group that you can use for record-keeping purposes. This date is intended for administrators only and doesn't appear in the user interface or in any reports.
Projected End Date	You can select an end date for the class group that you can use for record-keeping purposes. This date is intended for administrators only and doesn't appear in the user interface or in any reports.

For example, if you're responsible for all classes in a year, you can add January 1 as the start date and December 31 as the end date. You can then add all classes for that year. Next year, you know you can ignore those classes.

3. Go to *Classes* and click *add one or more from list* to add the classes that you want to group together.

Results

You can search classes by the class group: you can go to *Learning Activities* > *Classes* add the search criteria *Class Group*. You can filter by this class group and see all the classes that you grouped together.

6.5.2 Deleting a Class

Delete a class to remove it completely.

Context

When you delete a class, you cannot recover the class. As an alternative to deleting a class, consider making it inactive. When you inactivate a class, you keep its data in place, but remove it from active use.

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.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to delete.
3. In *Actions*, click *Delete*.

6.5.3 Removing Classes from Libraries

Remove classes from libraries so that users can't browse and search for specific classes and can't self-register.

Context

When you add a course to a set of libraries, all of its classes appear in libraries so that learners can find and enroll into the classes. In some cases, however, you can want to hide an individual class. For example, you can schedule

a special class that isn't for everyone - it's just for a particular group. You can remove that class from the library so that you can control the registration from the Administration environment.

By changing libraries from the library view, you can see everything in the library while you make the changes.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to change.
3. Click *Libraries*.
4. Look for the libraries that don't need to be included in the class and select them.
5. Choose ⊗ *Remove*.
6. Click *Save*.

Next Steps

If you accidentally removed a library, you can click + *Add Libraries* to add it back.

6.5.4 Creating Schedule Blocks

Create schedule blocks to block out a section of the learning schedule to keep others from scheduling time and resources.

Context

A schedule block is a block of time in the schedule that has resources, but no associated learning item. A schedule block is an **offering type**, so they're classes. You can add segments, users, instructors, and other resources to the schedule block.

Create a schedule block to block off some time and resources in the learning calendar so that the resources become unavailable at that time. When other administrators are scheduling learning for that time, they see that the resource is unavailable.

Your company has a list of schedule block types to help it organize. These types differ from company to company, but example types include:

- CONFERENCE - blocks out the instructor's time to attend a conference.
- MAINTENANCE - blocks out equipment for maintenance.

Procedure

1. Go to *Learning Activities* > *Classes*
2. Select *Schedule Block offering type* in the *Offering Type* search list.

6.6 Managing Costs of Classes

6.6.1 Changing a Class's Price in a Library

Change a classes' price in a library when you want to make an exception to the price that is set in the learning item.

Context

Classes inherit their price and currencies from their learning items. (*Learning Activities* > *Items* > *Pricing*). Sometimes, however, you don't want the class to inherit the libraries or prices. In these cases, you can change the price at the class.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class with the price that needs to change.
3. Click *Libraries*.
4. Click *Change Library Prices*.

Next Steps

After you click *Change Library Prices*, you run the *Library Price Change* wizard with the class preselected.

6.6.2 Class Government Reporting

We developed this content so that you can complete Declaration No. 2483 for reporting to the French government.

When you create a new class, the class inherits the values from the learning item for this tab. After you create the class, you can override these values. If you clear the *Include in government reporting* check box for a learning item, then you cannot select the *Include in government reporting* checkbox for a class.

This Field...	...Is Used as Follows
Include in government reporting	You must select the *Include in government reporting* checkbox to include this record as part of the Government Reporting Learning Events report.
2483 Legal Entity	If you select the *Include in government reporting* checkbox, then you must also associate this record with 2483 Legal Entity record. The system also includes the 2483 Legal Entity information in relevant reports. The 2483 Legal Entities in the list are enumerated when you first configure the system. You can change them in the *References* section.
Training Type	You can associate this record with a training type so that you use or refer to that information in a report. The training type will always be either Internal or External.
Allow exceptions when recording learning	This field is used when processing certain anomaly scenarios that are tied to the SF-182 form that were preventing the completions from being recorded. This field allows the completions to record for the class regardless if the related SF-182 form event had an unresolved issue or not, so that can be reconciled later without affecting the learning history record to go through.

6.6.3 Changing a Class Cost Calculation

Change the class cost calculation to adjust **how** SAP SuccessFactors calculates the overhead costs for creating, delivering, and maintaining a class. If you do not track costs for learning, then cost calculation does not apply to you.

Prerequisites

All cost names are enumerated in *References* > *Finance* > *Cost Names*. Add a cost name **before** you use it and make it available to classes.

Context

Many organizations do **not** use SAP SuccessFactors to track their training costs. If you do track training costs, however, you have a method for arriving at the total cost of the class. For example, you can add costs for the instructor, the facility, the materials, and other expenses (like cleaning costs). When you add the costs of the parts of the class, the total cost of the class is more accurate because it is the sum of its individual costs. This is the class cost calculation.

In some cases, however, you must add or remove a component of the cost structure. For example, if most of your facilities build cleaning costs into the facility fees, you can simply use `ScheduleLocationCost` as the cost of using the facility's location, including the cleaning costs. If, however, the class has an exception and the cost of cleaning is 10% of the location cost, you can add a calculation to calculate cleaning fees based on the location cost.

> **Note**
>
> You cannot remove a default cost calculation if it's currently associated with a formula or custom cost calculator.

> **Note**
>
> Classes inherit their cost calculations from courses when you first create the class.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to change the cost calculation for.
3. Go to *Cost Calculation*.
4. To add an additional cost, go to *Cost Formula*, select the cost type in *Cost Name*, add the calculation in *Formula*, and then click *Add*.

   For example, if you know that the facility charges 10% of the location fee as a cleaning fee, you can select cleaning fee in *Cost Name* and type **`ScheduleLocationCost*.1`** in *Formula*.

   > **Note**
   >
   > Custom cost calculators are rare and are typically added through custom development.

5. To change the cost currency, select it in *Cost Currency*.

   SAP SuccessFactors applies the default cost currency to all costs for this class. The numbers in the *Total* column are in the currency you select.
6. To remove a cost, select its *Remove* checkbox and then click *Apply Changes*.
7. To change the cost of any line item, select *Formula*, type either a formula or a direct amount, and then click *Apply Changes*.

Next Steps

Go to *Cost Summary* to enter the real costs of the line items in the cost calculation.

6.6.4 Adding Class Costs

Add class costs to change the total resource costs associated with a class so that the class cost calculator has the amounts it needs to calculate the total costs of the class.

Prerequisites

Before you can add class costs, associate all resources with the time slots of the class. For example, you can't see or adjust the base cost of an instructor until you add the instructor to a time slot. When you add the instructor, their base cost appears in *Cost Summary*.

You usually add base costs when you add the resource. For example, when you add an instructor, you declare the cost of using the instructor to teach a class. That cost is the **base cost** that appears when you add the instructor to the class time slots.

Context

If you're accounting for the costs of training, you can adjust the costs of individual classes. Class costs are the sum of the cost of their resources plus administration costs. You usually add administration costs as part of the cost calculation. For example, the administration cost might be 10% of the total cost of the class.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to add cost amounts to.
3. Go to *Cost Summary*.
4. For each cost type, choose ⊞ to see the base costs of the resource.
5. To make an exception to the base cost you configured when you added the resource, change the amount in *Base Cost* and the measure in *Unit of Measure*.

> ⚠ Caution
>
> When you change the base cost, any changes to the costs in the resource itself **don't** appear in the class. For example, imagine that you have an instructor with the base cost of 1000 per day. You change the base cost in *Cost Summary* to 1500. Later, you go to the **instructor** and change their base cost to 2000. The cost in the class remains 1500.

6. To change the base cost from one base cost to another, choose *Change to New Base Cost*.

   Resources can have more than one base cost to give you flexibility for how you account for costs. When you add a resource, you add one or more ways to account for the base cost and you declare one as the default. The default cost appears when you first look at *Cost Summary*.

   For example, an instructor might cost either 1000 per day by default or 200 per hour. You have flexibility for how you want to account for the cost of the instructor. If the instructor is teaching for a full day, you can select the default. If, however, the instructor is teaching for two hours for the class, you might select the 200 per hour base cost.

7. To add **additional** costs to the resource, click *Add an additional cost* and then add the information in *Add a Cost Amount and Unit of Measure*.

Option	Description
Cost Name	Select the cost name that you want to use to report this additional cost.
Amount	Add the amount of the additional cost.
Unit of Measure	Select whether the cost is per day, per hour, and so on.
Comments	Type comments to explain why the resource needs an additional cost.

   For example, if you add an instructor, but the instructor must travel to the facility, you can add the travel costs as additional costs.

8. To remove a base cost, select *Remove*.

6.6.5 Changing Class Prices

Change class prices to override the price set at the course.

Context

Some customers use Commerce to track the costs of training. A smaller number of customers use Commerce to create prices for training.

> ⓘ Note
>
> If the course set *Class Can Override Default Item Prices* to *No*, you cannot change the price.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to change the price of.

3. Go to *Pricing*.

   You see the current prices in the different currencies that you set up in the course that this class teaches.
4. To add additional currencies click *Add More Currencies*.
5. For each currency, select *Numeric* in *Type* and then type the new price in *Price*.

   Custom cost calculators are unusual. They calculate prices from other variables and are the result of custom development.
6. To change the default currency, select *Default* for the currency.

   The default currency is the selected currency for participants in the course.

Next Steps

After you select a different default currency or modify a class price and click *Apply Changes*, the system prompts you to launch the *Master Inventory Price Change* wizard. The wizard updates the price in the master inventory to the new price that you have set.

6.6.6 Changing the Cancellation Policy of a Class

Change the cancellation policy of a class to change how you issue refunds when learners withdraw from the course.

Prerequisites

Set up your cancellation policies in *References* > *Finanace* > *Cancellation Policies*.

Context

> **Note**
>
> If the course set *Class Can Override Item Cancellation Policy* to *No*, you cannot change the policy.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to change the cancellation policy of.
3. Go to *Pricing*.

You see the current prices in the different currencies that you set up in the course that this class teaches so that you can understand the prices that you refund with the cancellation policy that you choose.

4. Select the cancellation policy in *Cancellation Policy ID*.

6.6.7 Changing Class Chargeback Methods

Change class chargeback methods to modify how Commerce credits and debits users accounts for the class.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to change the chargeback methods of.
3. Go to *Purchasing*.
4. In *Edit Scheduling Chargeback*, select how Finance debits or credits users for the class for *Purchasing Option*.
   - Select *Inherit Item Chargeback Settings* to use the chargeback method that you set up on the course. This choice is the most common selection because you typically set it up centrally so that all classes inherit the same method.
   - Select *No Charge* if you do not want to charge users for this class. For example, you might say that the individual class is set up for learners who attempted to enroll many times and could not. You might not want to charge them for it.
   - Select *Charge to Buyer's Authorized Account Code* to debit the account code that users are authorized to use. Their authorized account code is defined on their learner profile. This is a common choice in both courses and classes because you can better control the accounts that learners can use.
   - Select *Charge to Buyer's Specified Account Code* to debit the account code that the learners specify. This choice is less common.
   - Select *Distribute Charges to Specified Account Codes* to always charge the same account codes, in proportion, regardless of the user in the class. If you choose this option, the UI will display the Sponsored label for the class, and the class price will be shown with a strikethrough.
5. Click *Apply Changes*.
6. If you select either *Charge to Buyer's Authorized Account Code* or *Charge to Buyer's Specified Account Code*, go to *Add Profit Centers* and click *add one or more from list* to add profit centers.

   Add the profit centers that receive the payments from the learners' account codes. The account codes are debited and the profit centers are credited.

   > **Note**
   >
   > You can add multiple profit centers and distribute the credits among them as percentages of the total.

7. If you select *Distribute Charges to Specified Account Codes*, add both ends of the transaction: in *Add Cost Center*, add the accounts to be debited and in *Add Profit Centers*, add the accounts to be credited.

> **Note**
>
> You can add multiple profit centers and distribute the credits among them as percentages of the total and you can add multiple cost centers and distribute the debits among them as percentages of the total.

8. If you are integrated with SAP FICO, select the correct allocation code for FICO in *Allocation Code*.

   If you selected *Inherit Item Chargeback Settings*, then the *Allocation Code* is inherited from the course and you cannot change it. If you select *No Charge*, you cannot change the allocation code.

6.7 Class Details Fields

This topic contains descriptions of the class details fields.

Time Zone

Field Names	Description
Class Time Zone	The time zone of the location where the class is scheduled to be held.
View Times in the Class Time Zone	Option to view the time in the scheduled location of the class.

General

Field Names	Descriptions
Description	Details to help users identify the class and its purpose. This field has a 4000 character limit.
Short Description	Brief information displayed on the class card and class list. This field has a 100 character limit.
Contact Name	Name of the person who maintains or owns the entity so that other administrators have a contact if they need to use or modify the entity.

Field Names	Descriptions
Contact Email Address	E-mail address of the person who maintains or owns the entity so that other administrators have a contact if they need to use or modify the entity. **Note** The VCAL/ICS part of the SystemEnrollmentNotification will be sent with this email address.
Contact Phone	Phone number of the person who maintains or owns the entity so that other administrators have a contact if they need to use or modify the entity.
Contact Fax	Fax number of the person who maintains or owns the entity so that other administrators have a contact if they need to use or modify the entity.
Primary Instructor	Person assigned to teach an instructor-led time slot. In the user interface, when users view the details for a registration or for a class, the system shows **only** the primary instructor for each agenda.
Primary Location	Location (for example, a room, lecture hall, or laboratory in a building) to go in the facility for the class. In the user interface, when users view the details for a registration or for a class, the system shows **only** the primary location for each time slot.
Facility	Facility (that is, a place that contains one or more locations) of the class in the users' current registration detail. When you select a facility, the list of locations available for a time slot is filtered to those associated with that facility. If you don't select a facility, the list of locations isn't filtered and you can select any location. **Note** If you change a facility after creating time slots with locations in the class agenda, you'll need to go back to those time slots and select a location that corresponds with the new facility.
Show Virtual Class indicator to users	When set to *Yes*, the "Virtual Class" indicator displays to users when they view the class.
Registration Close Date	Date by which users must register for the class. After this date, the system doesn't show the class in any libraries.

Field Names	Descriptions
Registration Close Time	The time on the registration close date by which learners must register for the class. After this time, learners can no longer register themselves. However, administrators can still register users for the class, even after the deadline.
Registration Close Time Zone	Time zone of the location where the class is registered.
Last Date to Withdraw	Date by which the users must withdraw from the class. If they miss the last date, then they're charged for the class even if they haven't attended it.
Withdraw End Time	Cut-off time when the user can withdraw from the class.
Withdraw End Time Zone	Time zone of a user to withdraw from the class.
Require Withdrawal Reason	When set to *Yes*, users and administrators must provide a withdrawal reason from the class. The default value for this field is set in *System Administration* > *Application Administration* > *Registration Settings*.

Access Settings

Field Names	Descriptions
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Status	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.

Email Confirmation for Admin-Initiated Actions

Field Names	Descriptions
Email confirmation to the User	Option to notify users of any action that their administrators have taken on behalf of them to modify the class details. **Note** If you want additional roles to receive email notifications for administrator-initiated actions, you need to set this field to *Yes*. This ensures the user is always aware of any important class updates.
Email confirmation to the Manager	Option to notify managers of users who are registered for the class of any action that the administrators have taken to modify the class details.
Email confirmation to the Instructor	Option to notify associated instructors of any action that the administrators have taken to modify the class details.
Email confirmation to the Contacts	Option to notify the person who maintains the class of any action that the administrators have taken to modify the class details.
Email Confirmation to the Reservation Owner	Option to notify the owners of seat reservations of any action their administrators have taken to modify the class details.

Email Confirmation for User-Initiated Actions

Field Names	Descriptions
Email confirmation to the User	Option to notify users of any action that they've taken to modify the class details. **Note** If you want additional roles to receive email notifications for user-initiated actions, you need to set this field to *Yes*. This ensures the user is always aware of any important class updates.
Email confirmation to the Manager	Option to notify managers of users who are registered for the class of any action that the users have taken to modify the class details.

Field Names	Descriptions
Email confirmation to the Instructor	try to register for the class Option to notify associated instructors of any action that the users have taken to modify the class details.
Maximum number of users who can register for a class. If usersEmail confirmation to the Contacts	Option to notify the person who maintains the class of any action that the users have taken to modify the class details.

Custom Fields

You can have any number of custom fields with custom labels.

Registration Settings

Field Names	Descriptions
Minimum Enrollments	Minimum number of users who must register before an instructor conducts an agenda of a class. This number is recommended because an instructor can still conduct an agenda with fewer users than the minimum enrolled number.
Maximum Enrollments	**after** it reaches the maximum registration limit, then the system changes the registration status for those users to "Waitlisted" until an open seat becomes available in the class. As an administrator, if you register more users than the maximum number, then the system warns (but doesn't prevent) you from exceeding the maximum registration limit. If the system fills all of an organization's reserved seats, then any users belonging to the organization who didn't fill one of the remaining seats can still register for the class (if you allow users to self-register) until they fill the maximum number of seats that you entered in the *Maximum Enrollments* field.
Registration Status	This read-only field to indicate the current number of enrolled and waitlisted users for a class. You can change a user's registration status in *Learning Activities* > *Classes* > *Registrations*.

Field Names	Descriptions
User can Self-Register	Option to let users register (or withdraw) themselves for a class in the user interface. When you create a new class, the system uses your registration settings (*System Administration* > *Application Administration* > *Registration Settings*) to determine the fields to be automatically selected for sending email notifications for a class.
Manager can Register Others	Option to let managers register users on behalf of them. The manager can only register the user using the *Register Other Members* on the class record or the Manage Enrollment tool within Team View.
User can Waitlist	Option for user to be waitlisted for a class.
Auto Enroll from Waitlist	Option to move users who are next on the waitlist into registration seats that open after users withdraw (or are withdrawn) from a class.
Unassign Item When Admin Withdraws	Option to remove item assignment from users when their administrators withdraw the item.

Approval Process

Approval Required	Option to determine whether or not an approval is required for a class.
Approval Process	*Approval Process ID* that is needed to approve the class.
Approval Required to Withdraw	Option to determine whether or not an approval is required to withdraw from the class.
Withdraw Approval Process	*Approval Process ID* that is needed to withdraw from the class.
User can withdraw when class is assigned by a manager	Option to determine whether a user is allowed to withdraw from a class if their manager registered them for the class. **Note** While the setting label references *assigned by a manager*, it applies to classes for which they were registered, not assigned.

Completion

Field Names	Descriptions
Certificate Template	Template of completion to be displayed once the class is over.

Administrative Use Only

Default Price	Value of a class's price that appears in libraries. Depending on your configured settings, you can change the price on either the class(*Learning Activities* > *Classes* > *Pricing*) or item entity (*Learning Activities* > *Items* > *Pricing*).
Cancelled	Read-only field to indicate if the class has been canceled. If the field says *No*, then the class is open. If you want to cancel the class, then you can select *Inactivate the Class* that opens the *Cancel Class* wizard.
Cancelled Date	Date on which the class is cancelled.
Closed	Read-only field to indicate if the class is closed. If the field says *No*, then the class is open. If you want to close the class, then you can select *Close the Class* that opens in the *Close Class* wizard.
Closed Date	Date on which the class is closed.
Class Group	The group in which a class belongs
Comments	Option to add additional information about the class.

6.8 Classes

Classes are instances of a course that are scheduled to start and end a specific time and have resources such as instructors, classrooms, and equipment.

A class is assigned specific resources for the scheduled date and time. For example, if you created a **course** for a (Cardiopulmonary Resuscitation) CPR certification, the **class** for the CPR course includes schedule, location, instructor and material information.

The course, on the other hand, describes what **every** CPR Certification course should have in common, such as the official learning goals, materials, and length of time.

7 Registering Learners for Classes

After you create classes, you can manage learners as they register into the class and then manage the class itself: sending rosters, communicating with participants, or canceling the classes.

After you create classes, you usually maintain the class through to closure. That usually means:

- You can troubleshoot registration based on the class size and enrollment. This includes managing a waitlist and approving enrollment activities. You can exceed the maximum registration for a particular class or you might answer questions about registration.
- Communicating with participants about last-minute changes.
- Canceling a class if it doesn't get enough interest from learners.
- Working with the roster to see who is in the class and who has attended segments of the class.

7.1 Viewing the Learners in a Class

View the learners in a class to see who is enrolled or waitlisted and determine the total number of people signed up.

Context

Managing registration is a central part of learning administration. For each class, you work with the system and your company to make sure the right amount of people and high priority people are registered for the class.

Most registration tasks involve moving learners from the list of non-enrolled learners to the list of enrolled learners and then assuring that the enrolled learners have learning events recorded.

Some registration tasks involve more complex and require an advanced view of the registration. In most cases, the advanced tasks involve commerce and how the system should charge a user for attending the course.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to manage.
3. Go to *Registrations* to see users who are not enrolled yet and users who are enrolled.

   In the *Registrations* tab for *Classes*, the search bar is enabled when entities are present and is used to filter results. Searching for *Registrations* by *User ID* or *User Name* returns relevant results.
4. To see details about the learners, click *Advanced*.

Next Steps

- Reserve space for high priority learners by creating **Seat Reservations**.
- View the waitlist for the class and move learners from the waitlist to the enrolled.
- Adjust the charges for learners attending this course.

7.2 Adding Learners to Class Registration Lists

Add learners to class registration lists when you want to enroll, waitlist, or cancel a learner in the class.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes* > *Registrations* .
2. Choose *Add Users*.
   A search window for learners appears.
3. Search for the learners you want to associate with the class.
4. For each learner who you want to associate with the class, select *Add* and then select a *Registration Status*.
   - Select *Enrolled* add a learner to the class. The instructor sees the learners' names in the class roster.
   - Select *Waitlisted* to put learners on a waitlist: learners who want to be enrolled in the class but aren't.
   - Select *Cancelled* to remove learners from the enrolled list.

   > **Note**
   >
   > Your company can have its own registration status **names** to describe the learners' place in the process but it can't have its own states. For example, "Enrolled from Waitlist" can mean a learner who was on the waitlist but is now enrolled. "Enrolled," however could mean enrolled without going through the waitlist. The underlying state for both names is the same, however: the learner is **enrolled**. The underlying state can't change. The state of being enrolled, waitlisted, or cancelled and appears in parentheses next to the name of the status. For example: "Enrolled from Waitlist (enrolled)."
5. Add additional information if you need it, like the order number that pays for the learner.

   > **Note**
   >
   > - When you create a seat reservation with a price that is greater than zero, then an order is created. Since the seat is already paid for, no payment is required when registering a user into that seat. For more information, please see SAP SuccessFactors Learning Orders [page 812].
   > - To use the *Reservation ID* field, you must clear the *Price*, *Chargeback Account*, and *Voucher* fields. Similarly, to use the *Voucher* field, you must clear the *Reservation ID*, *Price*, *Chargeback Account* fields.
6. Choose *Add*.

7.3 Reserving Seats in a Class for Specific Users

Reserve seats in a class for specific users when those users aren't in the same organization.

Prerequisites

- Creating an Assignment Profile [page 377]
- Placing Users into User Groups [page 643]

Context

User groups allow you to reserve seats for users who aren't all in the same organization. For example, you might want all managers in all organizations to take the same management class. By adding those managers to a user group, you can easily reserve their seats for the class.

If you want to reserve seats for users within the same organization, you can reserve seats for the organization.

Procedure

1. Log in to SAP SuccessFactors Learning and then navigate to *Learning Activities* > *Classes* and select the class that should have special reservations for the user group.
2. Go to the *Seat Reservations* tab and then choose + *(Add)*.
3. Choose the *User Group* button, then search for and select the desired user group.
4. Complete the remaining fields as needed and choose *Save* when you're done.

Related Information

Seat Reservations Fields [page 427]

7.4 Enrollment Status Meanings

In SAP SuccessFactors Learning users have an enrollment in a scheduled offering. The enrollment status describes where users are in their registration process.

Enrollment Status	Meaning
Enrolled	Enrolled users are users who are signed up for the class and are on the roster of users. You expect enrolled users to attend the course unless they withdraw.
Non-Enrolled	Nonenrolled users are waiting to be enrolled. They can be on a waitlist or awaiting approval. They have an interest in the scheduled offering but aren't on the list of enrolled users. You don't expect nonenrolled users to attend the course.
Waitlisted	Users who are waitlisted are nonenrolled. They're waiting for space in the course so that they can enroll. For example, if the course is limited to 10 participants, and if 10 participants are currently enrolled, the 11th and later users can waitlist. If a spot opens in the course, they can enroll. You can move users from the waitlist to empty spots in the roster.
Canceled (Withdrawn)	Users who are withdrawn are nonenrolled. They were enrolled at one time but they were removed from the roster for some reason.
Pending	Pending users are nonenrolled. They're waiting for approval to enroll into the course. When they get approval, and if there's space on the roster, they're enrolled.

7.5 Adjusting Payment Methods of Users in Classes

Adjust payment methods of users in classes if you're using commerce and you want to change how users are charged for the class.

Context

You can also use the advanced view to investigate the cost to a user, even if the user has already completed the class and the charge has gone through. The *Charged Amount* column shows the amount that the user was charged, after any price changes or refunds. If the charge is pending, the charged amount is zero.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to manage.
3. Go to *Registration* and then click *Advanced*.
4. In the *Advanced* window, you can investigate and adjust the method and amount that users are charged.
   - To charge the class to a voucher, enter it in the *Voucher* box.
   - To charge the class to one or more account codes, click *Edit* in the *Account Code* column.
5. Consider adding comments in *Comments* to describe the change and why you made it.

7.6 Adjusting Price of a Class to Users

Adjust the price of a class if you want to change the price for individual users in individual classes.

Context

You can also use the advanced view to investigate the cost to a user, even if the user has already completed the class and the charge has gone through. The *Charged Amount* column shows the amount that the user was charged, after any price changes or refunds. If the charge is pending, the charged amount is zero.

> → Tip
>
> If you want full context and information when you update the price, including the transaction history, investigate the order information and then offer a refund from the order page.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to manage.
3. Go to *Registration* and then click *Advanced*.
4. In the *Advanced* window, locate the user or users whose price you want to change by the *User Name*.
5. If you want to change the price itself, update the price in *Price*. You can change the currency in the currency list if needed.
6. If you want to offer a refund, add it in *Refund Amount*.
7. Add notes in *Comments* to describe the change and why you made it.

7.7 Investigating Order Information for Users in Classes

Investigate order information for users in classes when you want look up all orders for all users in a class.

Context

If you are using SAP SuccessFactors Learning finance features, you can look up all order information in a class. For example, if you are closing a class, you can look at all the orders for all the participants and verify that all the costs and charges were reconciled. Or, if you want to offer a refund but first want to investigate the order history to see what the user was already offered, you can look up the order and the order history.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to manage.
3. Go to *Registrations* and then click *Advanced*.
4. In the *Advanced* window, locate the user with order number you want to investigate.
5. Click the user's *Order Number*.

   The order opens and it is the same view that you would see if you went to *Finanace* > *Order Management*. You can see the history of the transactions and you can update the order.

7.8 Getting a Class Roster

Get a class roster to send the instructor a roster of learners before a class begins.

Context

Before a class starts, you might want to send the instructor the roster of users for the class.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.

2. Find and open the class that you want to view.
3. Click *View Roster*.

7.9 Resending Class Registration Email Notifications

Resend class email notifications when you make significant changes to a class and you want to announce the change immediately to the learners in the class.

Context

SAP SuccessFactors Learning sends default registration email notifications with an automatic process. Learners receive messages about their registration into the class. If you make significant changes to the class, you might not want to resend the email notifications immediately. For example, if you move a class time slot to a different room, you want to resend the registration email notification so that they get the information about the new room.

> ⓘ Note
>
> When you resend class registration notifications for *Virtual* classes, the system sends only an email notification to the registered learners. For classes that are not *Virtual*, registered learners receive two emails: one notification and another with a VCAL/ICS attachment.

> → Tip
>
> If you want to write your own notification to learners associated with the class, choose *Send Email Notification* in the *Actions* menu.

Procedure

1. Go to SAP SuccessFactors Learning Administration, go to *Learning Activities* > *Classes*, and then open the class that you want to send email notifications for.

   > ⓘ Note
   >
   > Usually, you don't need to search for the class because you send email notifications immediately after you make a change, so you're already looking at the class.

2. In *Actions* choose *Resend Registration Email Notifications*.

7.10 Recording Learning from the Class View

Record user completion of the class after it has ended so that learners get credit for completion.

Context

> **Note**
>
> You can only record user completion for classes that have already ended. If a class has not yet ended, the *Add to Learning History.* option is disabled in the *Actions* menu.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. From the *Actions* menu, click *Add to Learning History.*

Results

The Add to Learning History with Finance wizard launches. The system identifies the class because you launched the wizard from the class record. Follow the steps in the wizard.

7.11 Initiating Evaluations Manually

Initiate evaluations when you want to send out learner satisfaction surveys before the learner's learning is recorded as complete.

Prerequisites

- The course must have a learner satisfaction survey in *Learning Activities* > *Items* > *Evaluations* > *Course Evaluation*.
- The class must have enrolled learners who can complete the survey.
- The start date for the class must be today or earlier.

Context

When a learner completes a class, the next step is to record the learner's completion. You can send evaluation surveys before the completion is recorded and while the learners' memory is fresh.

Procedure

1. Go to *Learning Activities* > *Classes*.
2. Find the class and open it.
3. In the *Actions* menu, click *Initiate Evaluations*.

7.12 Adding Special Requests to a Class

Learning administrators use custom fields to add special requests to a class so that users can provide additional information when they register for the class. The export will export the status of each user.

Prerequisites

Unlike other custom fields, you can control who can enter data for the custom fields in a special request in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*.

Declare the custom field in *System Administration* > *Custom Fields* > *Special Requests*.

Context

Custom fields displayed during user registration provide a way for special request information to be captured. For example, if you're providing lunch, you might want to ask each user that registers for the class if they have dietary restrictions. You can add a special request to the class using a Dietary Restrictions custom field. In this example, users or administrators can indicate any special diet considerations when they register for the class. The data follows the user through the registration process.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes* > *Special Requests*.

2. To add custom fields to the special requests for the class, click *Add/Remove Custom Fields*.
3. To print or export the data for each user, click *Print* and *Export*.

7.13 Adding Instructional Text to the Class Registration Page

SAP SuccessFactors Learning administrators can customize labels that display on the class registration page to assist users when they need to provide accounting information.

Prerequisites

- The *Purchasing Option* for the class **isn't** defined as *No Charge*.
- The item classification is *Instructor-Led* or *Instructor-Led with Online Content*.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *References* > *Manage Labels* > *Labels*.
2. Search for and edit *Label ID* **`instruction.ApprovalProcess.ScheduledOffering.RequiresAccountCode`**.
3. On the *Locales* tab, define the text to display at the top of the user registration page. Define text for each active locale.
4. Choose *Apply Changes*.
5. Use the *Search Results* breadcrumb to navigate back to the *Search* page.
6. Search for and edit *Label ID* **`instruction.Registration.Financial`**.
7. On the *Locales* tab, define the text to display above the *Account Code* field on the user registration page. Define text for each active locale.
8. Choose *Apply Changes*.

8 Concluding Classes

Conclude classes when they have ended and you are ready to record attendance, assign completion status, and so on. When you are finished concluding classes, you close the class so that it is finished.

When you conclude a class, you reconcile what you planned in SAP SuccessFactors with the class that took place. For example, SAP SuccessFactors might show that five learners enrolled and planned to attend. But if one learner could not attend, you should mark four learners as attending the class and one as absent.

Concluding Classes for Most Customers

If you are **not** using Commerce, you can follow a simpler process because you do not need to reconcile costs for courses.

1. Record attendance for the class segments to reconcile the list of people who enrolled with the people who attended.
2. Record the learning completion for class participants. You can use the *Record Learning - Multiple* wizard to record the learning completions.
3. Close the class so that it is fully concluded.
4. If you need to adjust the information in a closed class, change it. This step is uncommon. You typically make the change when you learn later (for example from an instructor) something new about the class after you close it.

Concluding Classes for Customers using Commerce

If you **are** using Commerce, you have extra steps to conclude classes because you need to reconcile costs, prices, or both costs and prices.

1. Record attendance for the class segments to reconcile the list of people who enrolled with the people who attended.
2. Record the learning completion for those who attended the class. Use the *Record Learning - Financial* wizard to record the learning completions so that you can add transactional information when you record completion.
3. If you want to adjust the price charged to participants based on the cost to deliver training, use the bulk editor to adjust the costs. You enable the bulk editor at implementation time. You can use the bulk editor in addition to the *Record Learning - Financial* wizard.
4. Close the class so that it is fully concluded.
    - When you close the class, SAP SuccessFactors executes the financial transactions.
    - If you are selling courses to your extended enterprise, you can use the date closed as the revenue recognition date instead of the end date for the class.
5. If you need to adjust the information in a closed class, change it. This step is uncommon. You typically make the change when you learn later (for example from an instructor) something new about the class after you close it.

8.1 Recording Attendance for a Class Time Slot

Record attendance for a time slot to track the users who attended different time slots of the course.

Context

> **Note**
>
> Recording the **time slot** attendance is for administrative use only. SAP SuccessFactors Learning **doesn't** store this attendance with the user's learning history. The user's learning history is based on the **class completion**.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class for which you want to record attendance.
3. On the *Agenda* tab, choose ••• (*More*) for a specific time slot and then choose *Mark Attendance*.
4. Select the *Attendance* checkbox for each user to indicate that the user participated in the time slot and add comments as needed.
5. If the class has multiple time slots, you can choose *Copy to Same Day Time Slots* to copy the attendance and any comments for all users from the current time slot to all time slots that start on the same day.

8.2 Splitting Costs for Training

Split costs for training when you want to distribute the costs of a course over multiple participants.

Prerequisites

Enable the bulk learning event editor.

Check the users and transactions to make sure you can split costs:

- Participants must be in the same currency.
- Participants must use the chargeback method.
- You must be in a security role that allows you access to the participants (the users' domains must be in your domain restriction permissions).
- The participants must have learning events recorded for them for the course.

→ Tip

Don't change the tuition costs after you split costs. You can accidentally change the tuition costs if you run the existing Learning Event Editor tool after splitting costs.

Context

Customers who track the costs of training often want to split the costs among multiple participants. For example, if a course costs $1,500 and there are 10 participants, you might want to charge each participant $150. Furthermore, you might want to split each type of cost (instructor, equipment, facilities, materials, and custom) equally, so you might want to charge each participant $30 in each cost type.

Procedure

1. Go to *Learning Activities* > *Classes*.
2. Search for the class that you want to change and open it.
3. In the *Actions* menu, click *Edit Learning*.
4. For each cost column (for example, *Instructor Cost*, click *Split*.
5. Choose whether you want to split the costs equally among all users or to split the cost among selected users.

   If you choose to split costs among selected users, you can search for and select the users who should be assigned the cost.
6. At the bottom of the column, check the *Difference*.

   The difference uses your currency preferences in the calculation. For example, most administrators use two decimal places in their currency preferences. With two decimal places, if you divide $100 among three users, you see a remainder of $0.01 (one penny). The system assigns each user $33.33 of the cost - the cost to two decimal places - leaving a remainder of $0.01 in the *Difference* field.
7. If you see a difference, decide how you want to handle the difference.

   You can, for example, manually add a small remainder to a user.
8. Click *Split* in the other columns to repeat the process for each cost type.
9. Check the *Payment Information* and the *New Tuition Total* columns to verify that the right tuition total is charged to the right cost center.
10. Click *Save*.

    The bulk learning event editor respects the foreground job limits set by your system administrator. If you update many users at once, you might have to submit the change as a background job.

Next Steps

If you want to see the results of the bulk learning event editor, check the orders associated with the users.

After you split costs in the bulk learning event editor tool, don't change the costs in the existing learning event editor. If you do, you create a difference between the sum of the split costs and the tuition.

Related Information

Enabling the Bulk Learning Editor [page 250]

8.3 Editing Closed Classes

Edit closed classes to edit the details for learning events (classes) that already occurred.

Context

Use the learning event editor to search for a learning event, edit basic attributes of the event, and change its financial information. For example, if a different instructor substitute taught an event for a scheduled instructor, you could use the learning event editor to associate the substitute instructor with the event.

Procedure

1. Go to Learning Administration, and then go to *Manage User Learning* > *Learning Event Editor*.
2. Search for the past event and open it for editing.
3. To add attachments to the learning event, click *File Attachments*.
4. Use the tabs to edit information about the learning event and then click *Apply Changes*.

> **Note**
>
> For items and completion statuses that require an e-signature, the system prompts you to enter an admin ID, a PIN, and a meaning code. If an item or completion status requires an additional approval process, the administrator must enter the e-signature to proceed with the approval process. If an item or completion status does not require an additional approval process, the system displays a confirmation message that a user's data recorded successfully.

8.3.1 Learning History Editor Summary Fields

Use the learning history editor summary fields to view or modify the general details of the history record.

Field	Description
Instructor ID	We recommend that you choose the *Search* button to locate and select an instructor ID to associate with the history record. After you choose the *Search* button, the system allows you to select any instructor; that is, the system doesn't limit your choices to the authorized instructors who are listed on the *Instructors* tab of the history record (*Learning Activities* > *Items* > *Instructors*). If the instructor who led the course doesn't have a record in the system, then you must add it, or you can type the instructor's name in the *Instructor Name* field and leave the *Instructor ID* field empty.
Instructor Name	If you choose *Search* to locate and select an instructor ID to associate with the history record, then the system automatically populates the *Instructor Name* field.
Grade	The value that you type in the *Grade* field can be a letter grade, a number, or a number with decimal places and a percentage sign after it.
Completion Status	A completion status indicates the current state of a user's history record.
Completion Date/Completion Time	When you modify the learning data for an item or external event, you must enter a completion date and time that is in the past. For example, if you select today's date, then you must enter a time that is earlier than your current system clock time. You must enter a date and time that conforms to the date and time patterns that have been selected for the locale that you've selected on the *Locale* tab when you choose the *Preferences* link; the system displays the pattern hints below each field.
Time Zone	When you select a time zone (for example, Eastern Standard Time), the system automatically displays the record in that time zone.

Field	Description
Total Hours	You can enter the total number of hours that a user was engaged in completing a learning event in the *Total Hours* field. If you're changing a history record for an item and the item has time slots (*Learning Activities* > *Items* > *Time Slots*), then the system adds the duration values for each time slot and places that in the *Total Hours* field. If you're recording a history record for a class and the class has time slots on the *Time Slots* tab (*Learning Activities* > *Classes* > *Time Slots*), then the system calculates the difference between the start and end times of each time slot, adds those values, and places that in the *Total Hours* field.
CPE	CPE is an abbreviation for "Continuing Professional Education" and refers to learning activities that users perform to maintain and expand the skills that their profession demands. Therefore, CPE hours are very much like credit hours. Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. colleges, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equal 45; however, the college grants 3 **credit hours** for this class. The accumulation of CPE hours often leads to a professional certification.
Contact Hours	Contact hours are the total number of hours that you expect a user to have contact with an instructor. For example, in an 8-hour course that is instructor-led with online content, where 6 hours are in an instructor-led time slot and 2 hours are online, the contact hours would be 6.
Credit Hours	Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. colleges, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equal 45; however, the college grants 3 *credit hours* for this class.
Comments	We recommend that you use the *Comments* field 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. All comments are intended for administrators only and can't be viewed in the user interface.
Last Update User	The last update user information is read-only data that shows the user or administrator ID of the last person who modified the history record.

Field	Description
Last Update Time	The last update time information is read-only data that shows the date and time that the history record was last modified.
Esig Meaning Code	The system requires you to enter a meaning code that complies with FDA 21 CFR Part 11 requirements, ensuring the authenticity, integrity, and confidentiality of electronic records. You can create or edit meaning codes as needed (*References* > *Manage User Learning* > *E-signiture Meaning Code*).

8.3.2 Learning Event Editor Financial Fields

Use the learning event editor financial fields to associate a cost center or a voucher number to the learning event.

Field	Description
Voucher Number	The voucher number used by the user to pay for the event.
Price Paid	The price paid for the event for the corresponding user.
Cost Centers	The cost centers that are debited in the transaction.

8.3.3 Learning Event Editor User Costs

Use the learning event editor user costs fields to reconcile individual user costs for the learning event.

Field	Description
Cost Name	The cost name of that you can attribute costs to. For example, food, facility rental, or materials.
Amount	The amount that you want to record in the cost name. For example, if food cost for the student was $50, you could record 50 in the Food cost name.

8.3.4 Learning Event Editor Government Reporting Fields

Use the government reporting fields in the learning event editor to change data for training planner.

Field	Description
Include in government reporting	You can clear the *Include in government reporting* check box to remove this history record for any user you've selected to add learning history for.
Total Hours	The system shows the read-only value of total hours based on the information that was used to add learning history.
2483 Legal Entity	The system automatically loads the value for the *2483 Legal Entity* list based on the information that was used to add learning history. You can override this value for each history record.
2483 Employee Class	The system automatically loads the value for the *2483 Employee Class* list based on the information that was used to add learning history. You can override this value for each history record.
Hourly Rate and Currency	The system automatically loads the value for the Hourly Rate box and Currency list from the user's entity (*People* > *Users* > *Government Reporting*). You can override these values for each history record that you add. You can use the *2483 Program Hours* box to add the total number of hours for the history record and the Hours Outside of Work box for the number of hours the user spent on this learning event outside of work. The system uses the values in these boxes and the Hourly Rate box to calculate the amount that the user should be reimbursed.
2483 Programs	You must select the system-provided default DIF program to have the system count the program hours as used for the user (*People* > *Users* > *Government Reporting*). You can use the 2483 Program Hours box to add the total number of hours for the history record and the *Hours Outside of Work* box for the number of hours the user spent on this learning event outside of work. The system uses the values in these boxes and the *Hourly Rate* box to calculate the amount that the user should be reimbursed.

Field	Description
Hours Outside of Work	You can use the *2483 Program Hours* box to add the total number of hours for the history record and the *Hours Outside of Work* box for the number of hours the user spent on this learning event outside of work. The system uses the values in these boxes and the *Hourly Rate* box to calculate the amount that the user should be reimbursed.

8.4 Add Learning History with Finance

Use the *Add Learning History with Finance* wizard to post completion information for history records and reconcile charges with Finance.

The *Add Learning History with Finance* wizard posts completion status for a history record such as a course, a class, or an external event, to a learners' learning history. It also reconciles charges with Finance information like prices, account codes, and tickets.

> **Note**
>
> The **Certificate of Completion** notification can be triggered only from the *Add Learning History with Finance* wizard.

If you aren't using Learning Finance, use *Add Learning History for Multiple Courses* instead.

8.4.1 Setting Completion Status for Internal Learning Events with Financial Transactions

Use the *Add Learning History with Finance* wizard to give credit to learners for a single item or class and also reconcile the charges with Finance (prices, account codes, and tickets).

Context

In SAP SuccessFactors, we make a distinction between internal and external learning events. An internal learning event is a course that you set up in *Learning Activities* > *Items*. We know about the course because you've added it and configured it, you schedule classes for it. External learning events, however, don't have a course configured in SAP SuccessFactors. They are, for example, a seminar that employees enrolled in from a local university or a workshop at a conference. When you want to grant a completion status for external events, therefore, you must add more information because SAP SuccessFactors has no existing information for the course.

> **Note**
>
> Completion status can mean passing, failing, or another completion status. If learners fail a test, they have completed it and earned a failed status. If they passed the test, they have also completed it but earned the status of passed. In both cases, they have **completed** the course: successfully or unsuccessfully.

Procedure

1. Go to Learning Administration and then go to *Manage User Learning* > *Add Learning History with Finance*.
2. In *Step 1: Select Event Type*, select the type of internal learning event, and then click *Next*.
   - Select *Item* if you need to enter the time and date of the course. You often select *Item* if instructors held an impromptu class of the course and you weren't aware of it.
   - Select *Class* if you were aware of the time, date, and resources of the course. You select *Class* if you created a class based on the course, assigned it resources, scheduled it for a time, and so on. When you select *Class*, you can skip some steps because we already know information about the time and date, for example.
3. In the second step, use to find the course or the class that learners completed, and then click *Next*.
4. In *Step 3: Enter Learning Event Information*, type the information about how users should receive their completion status, and then click *Next*.

   > **Note**
   >
   > If a field says *Default*, you can edit it a few steps later. For example, you can type a default grade. Later in this wizard, all learners start with the default grade but you can change it per learner.

Choice	Description
Instructor ID **and**	If an instructor-led the course, click to find or change the instructor. Learning populates *Instructor Name* based on the ID you select.
Default Grade	Type the default grade that all learners get unless you change it individually in a later step. You need to know how the completion status grades courses based on type.
Default Completion Status	Select the default completion status that all learners get unless you change it individually in a later step.
Completion Date, *Completion Time*, **and** *Time Zone*	Select the time and timezone that you want to use as the time that learners completed the course. The completion date and time can be important for complying with curricula, for example. If learners must complete a course by January 1 to stay qualified, the date and time matters: if you record it for January 2, the learner isn't qualified but if you record it for December 30, the learner is qualified.
Default Price **and** *Currency*	Select the price you want to charge learners and the currency. You can change this later for individual learners.
Total Hours, *Credit Hours*, *Contact Hours*, **and** *CPE*	Some customers require a set number of hours of training to maintain qualification. If you have an organization that requires hours, type them here.

5. In *Step 4: Select Users*, click *add one or more from list* to add learners who should get a completion status for the course, and then click *Next*.
6. In *Step 5: Edit User Event Information*, change the grade and completion status for any learners who shouldn't receive the default grade and completion status, and then click *Next*.

   For example, if all learners receive passing credit but one, you can add a passing completion status in *Default Completion Status* earlier in the process and in this step, change the one learners completion status to something else. For example, incomplete or failed.
7. If the selected item or class has *Include in government reporting* selected and at least one participant you're creating a history record for also has *Include in government reporting* selected, then edit the government reporting information.

Choice	Description
2483 Program	You must select the system-provided default DIF program to have the system count the program hours as used for the user (*People* > *Users* > *Government Reporting*).
2483 Program Hours	Use the *2483 Program Hours* box to record the total number of hours for the learning event and the *Hours Outside of Work* box for the number of hours the user spent on this learning event outside of work. The system uses the values in these boxes and the *Hourly Rate* box to calculate the amount that the user should be reimbursed.
Hours Outside of Work	Use the *2483 Program Hours* box to record the total number of hours for the learning event and the *Hours Outside of Work* box for the number of hours the user spent on this learning event outside of work. The system uses the values in these boxes and the *Hourly Rate* box to calculate the amount that the user should be reimbursed.
2483 Legal Entity	The system automatically loads the value for the 2483 Legal Entity list from the user's entity (*People* > *Users* > *Government Reporting*). You can override this value for each history record that you add.
2483 Employee Class	The system automatically loads the value for the *2483 Employee Class* list from the user's entity. You can override this value for each history record you create.
Hourly Rate and Currency	The system automatically loads the value for the *Hourly Rate* box and *Currency* list from the user's entity. You can override these values for each history record you create. You can use the *2483 Program Hours* box to record the total number of hours for the learning event and the *Hours Outside of Work* box for the number of hours the user spent on this learning event outside of work. The system uses the values in these boxes and the *Hourly Rate* box to calculate the amount that the user should be reimbursed.
Include in Report	Clear *Include in Report* to remove this learning event for any user you've selected to add a history record for.

8. In *Step 6: Edit User Event Financial Information*, change price and currency for individual learners.

   For example, you might charge most learners 100 US Dollars for the course, but some learners 90 Euros.
9. Click *Edit* for each learner.
   a. In *Edit the Account Code Distributions*, click *add one or more from list* to add an account code.
   b. Search for an account code and add it.

Select the account code that you want to charge for this learner in this course.

c. In *Edit the Account Code Distributions*, change the default distribution to profit centers for this learner in this course.

   In account codes, you set the default distribution but you can change it here.

10. Click *Next*.
11. In *Step 7: Record Event*, review the information and select *Automatically Assess Related Competencies* to automatically assess competencies for these learners in this course.

    If you import competencies to Learning, you can add the competencies in *Learning Activities* > *Items* > *Competencies*. When you select *Automatically Assess Related Competencies*, learners who pass the course get the new competency you defined in *Learning Activities* > *Items* > *Competencies*.
12. Click *Finish*.
13. The options to *Print* or *Email* appear on the screen. If Email is selected, the Certificate of Completion template is triggered and sent to users.

8.4.2 Setting Completion Status for External Learning Events with Financial Transactions

Use the *Add Learning History with Finance* wizard to give credit to learners and also reconcile the charges with Finance (prices, account codes, and tickets) for a course that isn't tracked in Learning.

Context

In SAP SuccessFactors, we make a distinction between internal and external learning events. An internal learning event is a course that you set up in *Learning Activities* > *Items*. We know about the course because you've added it and configured it, you schedule classes for it. External learning events, however, don't have a course configured in SAP SuccessFactors. They are, for example, a seminar that employees enrolled in from a local university or a workshop at a conference. When you want to grant a completion status for external events, therefore, you must add more information because SAP SuccessFactors has no existing information for the course.

> **Note**
>
> Completion status can mean passing, failing, or another completion status. If learners fail a test, they have completed it and earned a failed status. If they passed the test, they have also completed it but earned the status of passed. In both cases, they have **completed** the course: successfully or unsuccessfully.

Procedure

1. Go to Learning Administration and then go to *Manage User Learning* > *Add Learning History with Finance*.
2. In *Step 1: Select Event Type*, select *External Event*

3. If you're using training planner and you want to match this event with a training request that someone has submitted, select *Match external events to approved Training Plan requests*, and then click *Next*.
4. In *Step 2: Enter External Event Description*, type a description of the event in *Description*, and then click *Next*.

   Type a description that helps others understand the learning event. Some companies define a pattern for the description that tells them about where the course took place, for example.
5. In *Step 3: Enter Learning Event Information*, type the information about how users should receive their completion status, and then click *Next*.

   > **Note**
   >
   > If a field says *Default*, you can edit it a few steps later. For example, you can type a default grade. Later in this wizard, all learners start with the default grade but you can change it per learner.

Choice	Description
Additional Details	Enter extra information that supports the *Description* field.
Instructor ID **and**	Select to find the instructor. Learning populates *Instructor Name* based on the ID you select.
Default Grade	Type the default grade that all learners get unless you change it individually in a later step. You need to know how the completion status grades classes based on type.
Completion Date, *Completion Time*, **and** *Time Zone*	Select the time and timezone that you want to use as the time that learners completed the course. The completion date and time can be important for complying with curricula, for example. If learners must complete a course by January 1 to stay qualified, the date and time matters: if you record it for January 2, the learner isn't qualified but if you record it for December 30, the learner is qualified.
Default Completion Status	Select the default completion status that all learners get unless you change it individually in a later step.
Default Price **and** *Currency*	Select the price you want to charge learners and the currency. You can change this later for individual learners.
Total Hours, *Credit Hours*, *Contact Hours*, **and** *CPE*	Some customers require a set number of hours of training to maintain qualification. If you have an organization that requires hours, type them here.
Source	Select the course (external learning item) source from the dropdown.
Source URL	Enter the URL to define the source of the training.
Category	Select to choose a learning category for the external event.
Delivery Method	Select the delivery type for the external learning from the dropdown.

6. In *Step 4: Match Training Requests to the Learning Event*, find the training request that this learning event fulfills, and then click *Next*.

   This step appears if you selected *Match external events to approved Training Plan requests* previously.
7. In *Select Users*, click *add one or more from list* to add learners who should get a completion status for the course, and then click *Next*.

8. In *Edit User Event Information*, change the grade and completion status for any learners who shouldn't receive the default grade, and then click *Next*.
9. If you selected *Match external events to approved Training Plan requests* complete the training plan (government reporting) information and then click *Next*.

Choice	Description
2483 Program	You must select the system-provided default DIF program to have the system count the program hours as used for the user (*People* > *Users* > *Government Reporting*).
2483 Program Hours	Use the *2483 Program Hours* box to record the total number of hours for the learning event and the *Hours Outside of Work* box for the number of hours the user spent on this learning event outside of work. The system uses the values in these boxes and the *Hourly Rate* box to calculate the amount that the user should be reimbursed.
Hours Outside of Work	Use the *2483 Program Hours* box to record the total number of hours for the learning event and the *Hours Outside of Work* box for the number of hours the user spent on this learning event outside of work. The system uses the values in these boxes and the *Hourly Rate* box to calculate the amount that the user should be reimbursed.
2483 Legal Entity	The system automatically loads the value for the 2483 Legal Entity list from the user's entity (*People* > *Users* > *Government Reporting*). You can override this value for each history record that you add.
2483 Employee Class	The system automatically loads the value for the *2483 Employee Class* list from the user's entity. You can override this value for each history record that you add.
Hourly Rate and Currency	The system automatically loads the value for the *Hourly Rate* box and *Currency* list from the user's entity. You can override these values for each history record that you add. You can use the *2483 Program Hours* box to record the total number of hours for the learning event and the *Hours Outside of Work* box for the number of hours the user spent on this learning event outside of work. The system uses the values in these boxes and the *Hourly Rate* box to calculate the amount that the user should be reimbursed.
Include in Report	Clear *Include in Report* to remove this learning event for any user you've selected to add history for.

10. In *Step 6: Edit User Event Financial Information*, change price and currency for individual learners.

    For example, you might charge most learners 100 US Dollars for the class, but some learners 90 Euros.
11. Click *Edit* for each learner.
    a. In *Edit the Account Code Distributions*, click *add one or more from list* to add an account code.
    b. Search for an account code and add it.

       Select the account code that you want to charge for this learner in this event.
    c. In *Edit the Account Code Distributions*, change the default distribution to profit centers for this learner in this event.

       In account codes, you set the default distribution but you can change it here.
12. Click *Next*.

13. In *Step 7: Record Event*, review the information and if it's correct, click *Finish*.
14. The options to *Print* or *Email* appear on the screen.

8.5 Add Learning History for Multiple Courses

The *Add Learning History for Multiple Courses* wizard posts completion status for multiple learning events (a course, a class, or an external event) and multiple participants to learners' learning history but doesn't reconcile charges with Finance.

If you're using Learning Finance, use *Add Learning History with Finance* instead.

8.5.1 Setting Completion Status for Internal Learning Events Without Financial Transactions

Use the *Add Learning History for Multiple Courses* wizard to give credit to learners for completing one or more items or classes, without financial transactions.

Context

In SAP SuccessFactors, we make a distinction between internal and external learning events. An internal learning event is a course that you set up in *Learning Activities* > *Items*. We know about the course because you've added it and configured it, you schedule classes for it. External learning events, however, don't have a course configured in SAP SuccessFactors. They are, for example, a seminar that employees enrolled in from a local university or a workshop at a conference. When you want to grant a completion status for external events, therefore, you must add more information because SAP SuccessFactors has no existing information for the course.

> **Note**
>
> Completion status can mean passing, failing, or another completion status. If learners fail a test, they have completed it and earned a failed status. If they passed the test, they have also completed it but earned the status of passed. In both cases, they have **completed** the course: successfully or unsuccessfully.

Procedure

1. Go to Learning Administration and then go to *Manage User Learning* > *Add Learning History for Multiple Courses*.
2. In *What kind of learning do you want to add to history?*, select the type of internal learning event.
   - Select *Item* if you need to enter the time and date of the course. You often select *Item* if instructors held an impromptu class of the course and you weren't aware of it.

- Select *Class* if you were aware of the time, date, and resources of the course. You select *Class* if you created a class based on the course, assigned it resources, scheduled it for a time, and so on. When you select *Class*, you can skip some steps because we already know information about the time and date, for example.

> **Note**
>
> The names of screen elements in the next step change based on what you choose.

3. In *Search & Add Items* or *Search & Add Classes*, use to find the courses or the classes that learners completed, and then click *Add*.

   Select many events when learners have progressed through a set of courses together. For example, if a group of employees all completed the same set of courses as a cohort, you can select all people and all the courses in the cohort.

4. In *Search & Add Users*, use to find the learners who completed the events, and then click *Add*.
5. Click *Next*.
6. In *Edit Details*, change the details of each person for each course, and click *Apply Changes* to save your changes.

Choice	Description
Grade / Completion	Type the grade and select the completion status that the learner receives for the course.
Default Completion Status	Select the default completion status that all learners get unless you change it individually in a later step.
Completion Date, *Time*, **and** *Time Zone*	Select the time and timezone that you want to use as the time that learners completed the course. The completion date and time can be important for complying with curricula, for example. If learners must complete a course by January 1 to stay qualified, the date and time matters: if you record it for January 2, the learner isn't qualified but if you record it for December 30, the learner is qualified.
Total Hours, *Credit Hours*, *Contact Hours*, **and** *CPE*	Some customers require a set number of hours of training to maintain qualification. If you have an organization that requires hours, type them here.

7. Click to add the instructor who taught the course.
8. Click *Next*.
9. In *Change the way competencies are assessed*, select how you want to assess competency improvement for the learners.
   - Select *Assess based on item setting* to assess related competencies for each individual item based on the *Do Auto Competency* setting of the course. If *Do Auto Competency* is true for a course, then the system assesses competencies related to that course.
   - Select *Assess all items* to apply the rating of each competency in the course (*Learning Activities* > *Items* > *Competencies*) to each user who earned a for-credit completion status. You can view the assessed competencies in *People* > *Users* > *Assessments* .
   - Select *Do not assess* if you don't import competencies to Learning.

If you import competencies to Learning, you can add the competencies in *Items* > *Competencies*. When you select *Automatically Assess Related Competencies*, learners who pass the course get the new competency you defined in *Items* > *Competencies*.

10. Click *Submit*.

Next Steps

If you're using e-signatures, you enter your e-signature details to verify your identity.

If you're recording completion status for a class, close the class. Open the class in *Learning Activities* > *Classes* go to *Actions* and click *Close*.

8.5.2 Setting Completion Status for External Learning Events Without Financial Transactions

Use the *Add Learning History for Multiple Courses* wizard to give credit to learners for completing one or more courses, without financial transactions, that aren't configured in SAP SuccessFactors.

Context

In SAP SuccessFactors, we make a distinction between internal and external learning events. An internal learning event is a course that you set up in *Learning Activities* > *Items*. We know about the course because you've added it and configured it, you schedule classes for it. External learning events, however, don't have a course configured in SAP SuccessFactors. They are, for example, a seminar that employees enrolled in from a local university or a workshop at a conference. When you want to grant a completion status for external events, therefore, you must add more information because SAP SuccessFactors has no existing information for the course.

> **Note**
>
> Completion status can mean passing, failing, or another completion status. If learners fail a test, they have completed it and earned a failed status. If they passed the test, they have also completed it but earned the status of passed. In both cases, they have **completed** the course: successfully or unsuccessfully.

Procedure

1. Go to Learning Administration and then go to *Manage User Learning* > *Add Learning History for Multiple Courses*.
2. In *What kind of learning do you want to add to history?*, select *External Event*.

3. In *Add External Events* describe the event in *External Event* and then click *Add*.

   You can add more than one event.

4. In *Search & Add Users*, use  to find the learners who completed the events, and then click *Add*.
5. Choose *Next*.
6. In *Edit Details*, change the details of each person for each course, and click *Apply Changes* to save your changes.

Choice	Description
Grade / Attendance / Completion	Type the grade that the learner receives for the course.
Completion Date, *Time*, **and** *Time Zone*	Select the time and timezone that you want to use as the time that learners completed the course. The completion date and time can be important for complying with curricula, for example. If learners must complete a course by January 1 to stay qualified, the date and time matters: if you record it for January 2, the learner isn't qualified but if you record it for December 30, the learner is qualified.
Total Hours, *Credit Hours*, *Contact Hours*, **and** *CPE*	Some customers require a set number of hours of training to maintain qualification. If you have an organization that requires hours, type them here.
Source	Select the course (external learning item) source from the dropdown.
Source URL	Enter the URL to define the source of the training.
Category	Select  to choose a learning category for the external event.
Delivery Method	Select the delivery type for the external learning from the dropdown.
Additional Details	Enter extra information that supports the *Description* field.

7. Choose *Next*.
8. Choose *Submit*.

Next Steps

If you're using e-signatures, you enter your e-signature details to verify your identity.

8.6 Closing Classes

Close classes (classes) when you have recorded attendance, recorded completion status for users, and (if you are using Commerce) reconciled transactions.

Context

If you use commerce, then closing classes is important to create a revenue recognition date. Although some customers use the end of the class, many also use the closing date. It is the date that you finalize the transactions.

Even if you are not using Commerce, it is still a good idea to close classes. Closed classes indicate that you have recorded attendance and recorded completion statuses. When a class is closed, other administrators cannot register new participants by accident and learners cannot self-register.

> **Note**
>
> The purpose of closing a Class is to finalize the total costs required to deliver the class and for administrators not to be able to register additional users on it (and to prevent users from self-register in them). The date and time is something that an administrator still could change, even if the class status is Closed.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Classes* > *Details*.
2. In *Closing Date*, type the date that you want to use as the close date and then click *Next*.

   If you use Commerce, you might be using closing date as a revenue recognition date.
3. In *Step 2: Edit Realized Costs*, identify and edit the costs that the class incurred prior to the closing date and then click *Next*.

   In most cases, you already set the costs in a previous step: in the *Record Learning - Financial* wizard, for example.

   If you do **not** use Commerce, ignore this step.

   You must select the *Include* check box next to each resource that you want to include in the total and then click *Update Total* to update the total cost of the class before proceeding to the next step.
4. In *Step 3: Specify Cost Center Accounts*, add one or more cost center accounts and then distribute costs among each account by adjusting the percentage values in *Distribution*, and then click *Next*.

   This step appears only if you set a realized cost in the last step.
5. In *Step 4: Specify Profit Center Accounts*, add one or more profit center accounts and then distribute profits among each account by adjusting the percentage values in *Distribution*, and then click *Next*

   This step appears only if you set a realized cost in the last step.
6. Confirm what you have entered and then click *Finish*.

8.7 Enabling the Bulk Learning Editor

Enable the bulk learning editor to allow administrators to split costs easily among multiple participants.

Context

Customers who track the costs of training often want to split the costs among multiple participants. For example, if a course costs $1,500 and there are 10 participants, you might want to charge each participant $150. Furthermore, you might want to split each type of cost (instructor, equipment, facilities, materials, and custom) equally, so you might want to charge each participant $30 in each cost type.

Procedure

1. Go to *System Administration* > *Security* > *Roles* and find the role with the administrators who should have access to the bulk learning editor.

   The administrators in this role should be trusted with distributing the costs of training.
2. Add the Edit Learning Event Commerce permission to the role.

   > **Note**
   >
   > The bulk learning event editor respects security domain group set on the permission restrictions for a role. If you've configured a permission restriction with a security domain group for the administrator's role and a user's security domain falls outside of that security domain group, then administrators using the bulk learning editor can't edit the costs borne by that user.
3. Save and close the role.
4. Go to *System Administration* > *Configuration* > *System Configuration* and open *LMS_ADMIN*.
5. Find `manageLearningToolEnabled` and set it to **`true`**.

8.8 Learning Completion

Learning completion in SAP SuccessFactors Learning means that a user has come to the end of a learning event, but it does not mean that the user passed or failed.

Learning completion is a core concept of SAP SuccessFactors Learning. When a user has **completed** a learning event, the user has finished the course of work assigned to him or her. For example, if users are assigned a three-day in-person course, and they attend the course, then at the end, they have **completed** the course. Or, if they've been assigned an online course and they watch all the videos, take all the quizzes, and look at all the materials in the course, then they've **completed** the course.

> **Note**
>
> Completion status can mean passing, failing, or another completion status. If learners fail a test, they have completed it and earned a failed status. If they passed the test, they have also completed it but earned the status of passed. In both cases, they have **completed** the course: successfully or unsuccessfully.

Importantly, learning completion is separate from their status at the time of completion. For example, they can complete a course, but their status at that time can be that they failed the course. Their status can be that they passed the course for credit or passed the course without getting credit. Users can even complete a course with an incomplete status if they attended half of the course, for example.

8.9 Results of Learning Completion

Learning completion, as an event in your business process, creates learning history records for the user, which can affect multiple downstream processes.

When users complete learning, and when that completion is formally recorded in the Learning Management System (LMS), the LMS adds that completion to their learning history. The completion is usually combined with a completion status, which is like a grade for the course: passed, failed, incomplete, and so on.

Additionally, you can also trigger external events in Intelligent Services.

Related Information

Enabling Learning Completion Events to Be Published to Intelligent Services Center

8.10 Posting Learning Events to the LMS with a Web Service

You post learning events to SAP SuccessFactors Learning to indicate that the user has finished a learning item and is complete, passed, failed, or some other completion status.

Various people in your organization post learning events to SAP SuccessFactors Learning: users can post the completion of self-assigned courses, and supervisors and administrators can post the completion of courses for users. Exactly how each user role can post learning events depends on your configuration.

8.11 Learning History

A learning history impacts your business process because it is the audit trail of each users' training.

Each individual user's learning history is the list of courses that the user formally completed: learning completion has been triggered. Users can see their learning history in their learning history tile. Learning history is a part of learning completion or learning compliance reports that you run.

When you look at users' learning history, you see that users have completed the learning event and also their completion status. The completion status is like a grade: pass, fail, incomplete, and so on.

By using Intelligent Services, you can trigger additional events to occur when a learning event is completed and enters users' learning history.

> **Note**
>
> To select an event type that you want to add to history, ensure to click the *Item based event* or *External Event* link on the *Add to Learning History* page.

Unified Learning History

With the 1H 2205 release, a consolidated Learning History is available for all your employments as a user with Global Assignment/Concurrent Employment (GA/CE) in SAP SuccessFactors Learning. For example, if you hold one employment with a particular user ID and complete three learning items, and then also complete two other learning items with a secondary employment that has a different user ID, you can now see the consolidated Learning History for both such User IDs with all the five learning items. This is applicable both in the Manager view and the Learner view.

This functionality is controlled by a flag which is disabled by default. The administrator can turn on the `learningHistoryOfAllEmployments` flag, found in *System Configuration*. When the `learningHistoryOfAllEmployments` flag is set to *True*, there is a new column in the Learning History table called *User ID*.

Actions (apart from Rating) are enabled only for the logged in user ID. You can give the rating for Learning Items for all the user IDs.

The Learning History tile allows you to see the **Recently Added** items. Only the logged in user can go to the details of the courses in the Learning History tile, this action is unavailable for all others users who are not logged in.

If you minimize the Learning History tile, you can see the total number of Learning Items for all the employments.

Related Information

Enabling Learning Completion Events to Be Published to Intelligent Services Center

8.12 Triggers for Learning Completion Event

Learning completion, as an event in your business process, can be triggered by administrators, by supervisors, or by the SAP SuccessFactors Learning Learning Management System (LMS).

Learning completion is an event in your business process. It signals that a user has come to the end of a course or set of courses. That signal is created in the following ways:

- An administrator or a supervisor runs one of the Record Learning wizards.
- A user reaches the end of an online course and the course reports back completion.
- A web client, built by your company, connects to the record learning event web service to report learning completion.

8.13 Cancel Class

View this section if you want to use a Wizard to cancel a class.

In *Learning Activities* > *Classes* > *Actions* > *Cancel*, you can use the Cancel Class wizard to cancel the class of an item or a resource block.

After you cancel a class with the Cancel Class wizard, the system removes any associated items from a user's learning assignments **only** if you registered the user for the class in *Learning Activities* > *Classes* > *Registrations*. If you directly assigned any items on the user's Learning Plan tab or through a curriculum, then you must remove the learning items in *People* > *Users* or *Curricula*.

Step	Purpose
Step 1: Select Class to Cancel	In the *Cancellation Date* box, you must select a date (today's date appears by default) that you want to cancel the class. Regardless of the date you select, the system cancels the class and withdraws any users from it when you complete the cancellation process.
Step 2: Edit Realized Costs	You can identify and edit the costs that the class incurred prior to the closing date. You must select the *Include* check box next to each resource that you want to include in the total and then click *Update Total* to update the total cost of the class before proceeding to the next step. If there are no costs in step 2, then the system skips steps 3 and 4.
Step 3: Specify Cost Center Accounts	You can add one or more cost center accounts and then distribute costs among each account by adjusting the percentage values in the Distribution column. When you finish adding cost center accounts and distributing costs, you can proceed to the next step. This step appears only if you set a realized cost in the *Edit Realized Costs* section in step 2.

Step	Purpose
Step 4: Specify Profit Center Accounts	You can add one or more profit center accounts and then distribute profits among each account by adjusting the percentage values in the Distribution column. When you finish adding profit center accounts and distributing the profits, you can proceed to the next step. This step appears only if you set a realized cost in the *Edit Realized Costs* section in step 2.
Step 5: Confirm	In this step, you can control how the system responds after you cancel a class. You can add users to the request list for the item, send email notifications, and inactivate the class.

8.13.1 Canceling a Class

Cancel a class to control how costs are reflected and how enrolled users are managed.

Context

When you cancel a class, you launch a wizard that identifies and balances costs incurred before you canceled. You can also manage the current class roster by notifying registered users of the cancellation and identifying another instance of the item.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to cancel and then click *Cancel Class*

   Identifying information about the class is auto-populated.
3. Click *Next*.

Next Steps

Balance the costs and manage the roster.

8.13.2 Balancing Costs when you Cancel the Class

Balance your realized costs when you cancel a class by editing realized costs and specifying cost center and profit center accounts.

Context

When you cancel a class, you often do so after you have already incurred costs for the class. These costs include instructor, location, material, equipment, and custom resource costs.

For example, the total cost of materials for the training might be $400. You may have already incurred $100 worth of the cost of materials when you cancel the class. Identify that you have so far only incurred $100 of the $400 materials cost and assign that $100 to the right budget.

Procedure

1. To *Edit Realized Costs*, identify costs the class incurred before the cancellation date.
   a. Expand the *Class Total* menu and select *Include* next to each resource that you want to include.

      You can include the instructor, location, material, equipment, and custom resource costs in your *Class Total*.
   b. To recalculate total costs, click *Update Total*. To revert to original values, click *Reset*.
   c. Click *Next*.
2. To *Specify Cost Center Accounts*, add one or more cost center accounts and then distribute costs among each account:
   a. To add a cost center account, enter the Cost Center Account ID and click *Add*.
   b. Update the cost center account by distributing costs among each cost center account. Adjust the percentage values in the *Distribution* column.
   c. Click *Apply Changes*.
   d. Click *Next*.
3. To *Specify Profit Center Accounts*, add one or more profit center accounts and then distribute profits among each account.
   a. To add a profit center account, enter the Profit Center Account ID and click *Add*.
   b. Update the profit center account by distributing profits among each profit center account. Adjust the percentage values in the *Distribution* column.
   c. Click *Apply Changes*.
   d. Click *Next*.

Next Steps

Manage the roster in a canceled class.

8.13.3 Managing Class Rosters when you Cancel a Class

Manage the roster in a canceled class to notify users, instructors, and other important contacts about cancellation and identify users who must complete the course.

Context

When you cancel a class, consider notifying the registered users, their supervisors, instructors, and contacts about the cancellation. Identify and add the users from the current class to the request list for its course. Employees see prompts to enroll into later classes for the same course.

Procedure

1. Identify your post cancellation action settings to control how the system responds after you cancel a class.

Option	Result
Add enrolled, waitlisted, and pending users to the request list for this item.	Select this checkbox to add enrolled, waitlisted, and pending users to the request list of people who might want to register for the next class of this item. By selecting this option, you keep a record of users who must complete the learning item.
Send Notification to User, Supervisor, Instructor, and Contacts.	Select any of these checkboxes to notify each group of the class cancellation. You can configure and edit cancellation notifications by going to *Learning Activities* > *Classes* > *Notifications*. Specify the users, supervisors, instructors, and other contacts in *Learning Activities* > *Classes* > *Contacts*.
Inactivate the Class	Select this checkbox to inactivate the class. This action clears the *Active* checkbox of the class after you complete the cancellation process. After inactivating and canceling a class, the system does not include the record of canceled and inactivated classes when you search for active classes or run reports.

2. Click *Next*.
3. Confirm the information that you provided for the canceled class.
4. Click *Finish*.

Next Steps

You cannot reactivate a canceled class. To copy information from the canceled class to a new class, click *Copy* from the *Actions* menu.

9 Learning Programs: Bundled Courses in a Syllabus

SAP SuccessFactors Learning programs are a syllabus of courses that walk users down a learning path.

Learning programs combine learning events to create a learning path: a set of learning experiences that learners progress through. The program's agenda defines the events and the order in which they occur for the learner. For example, you can create a month-long employee on-boarding program. The agenda can be weekly: a new learning event for each week over a month. The learning events can be internal learning items or they can be external content (such as a welcome video hosted on the company intranet).

Programs aren't **necessarily** ordered. Users can skip experiences or go backwards, but the order is suggested. By default, when a class is part of a program assigned to learners, the program bypasses any prerequisites set for that class. This means learners can register for the class without first meeting the prerequisites. The system can optionally be configured to enforce item-level prerequisites and approvals for courses in programs, so that learners must satisfy any unmet requirements before registering for or accessing the course. This behavior provides flexible learning paths for users while giving administrators the option to require stricter controls when needed.

> → Tip
>
> Programs are like curricula, but curricula are for customers whose learning management systems must comply with a regulator. Programs are easier to create but don't have some requirements of regulated customers.

Adding Learning Programs [page 259]
: Add new learning programs to create a learning path: a set of experiences that learners engage as a series over time.

Adding Attributes to Programs [page 261]
: Add competency and skill attribute types to programs so that when learners complete a program, they build the associated attributes.

Creating Agendas for Learning Programs [page 263]
: Create agendas for programs to define the activities that take place during the program.

Adding Items to Learning Program Agenda [page 264]
: Add learning items to a program agenda to track users' completion.

Learning Programs Basic Settings [page 266]
: The basic settings of a learning program control its behavior and basic attributes.

Viewing the Assignment Profiles that Assign a Program [page 269]
: View the assignment profiles that assign a program when you want to know how the program gets automatically assigned to users.

Translating Learning Program Titles and Descriptions [page 270]
: Translate learning program titles and descriptions so that employees an see them in their own language.

Associating Learning Programs with SAP Jam Groups [page 271]
: Associate learning programs with SAP Jam groups to create a space for users in the program to share knowledge.

Adding Learning Program to Libraries [page 272]

Add learning programs to catalogs so that users can find them in their catalogs and participate in the programs.

9.1 Adding Learning Programs

Add new learning programs to create a learning path: a set of experiences that learners engage as a series over time.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Learning Activities* > *Programs*.
2. Click *Add New*, and then enter some basic information about the program.

Field	Description
Program ID	Many customers have an ID naming pattern. If you have a naming pattern, use that for the ID.
Title	A good program title helps users and recommendation logic find and identify programs. Avoid using codes that mean something only to **administrators**. For example, if you, as administrators, understand WRT-100 as a code, but your learners wouldn't , exclude that code.
Description	A good description helps users and recommendation logic understand the contents of the program. Use the description to write what learners should expect if they were to participate in the program.
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.
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.

3. Select the program *Type*.

Choice	Description
Scheduled	A *Scheduled* program type has fixed start and end dates. You can create a scheduled learning program that starts on January 1 and ends on January 31. All employees who are assigned the program, therefore, start it on January 1 and have a due date January 31. **Note** On assignment of a scheduled program, the program's start date/time and end date/time is displayed in the learner's preferred time zone.
Duration-based	A *Duration-based* program type has a fixed duration but users can start at different times. This is useful for self-paced programs. You can create a duration-based program of 30 days. No matter when they start the program, they have 30 days until its due date. **Note** On assignment of a duration-based program, the program's start date/time and end date/time is displayed in the learner's preferred time zone.
Open-ended	An *Open-ended* program type is self-paced with no time limitations. Users don't see a due date and can start the program at any time.

4. Select a completion status for the program.

   Completion status is a central element of SAP SuccessFactors Learning. It determines whether your users receive credit for their courses and if they receive follow up evaluations or an approval process. For example, when learning administrators record learning for an employee, they can record a completion status of “pass” or “fail”. That completion status can then trigger:

   - Follow up evaluations - for example, a passed course might send a follow up evaluation to users and managers to see how learners applied their new skills but a failed course might not.
   - Approval processes - if you enabled e-signatures, which is common for validated customers, you can send approval processes after users receive a completions status. The approval process is a secondary validation that the user passed or failed the course.

5. Select a *Progress Restriction* option.

Choice	Description
By Completion	If you select *By completion*, users see the next section in the program when they complete the previous section. This option is useful for self-guided programs.
By schedule	If you select *By schedule*, users see the next section in the program at a scheduled time that you define. If the program has a hard completion date and you want to pace users, this option is useful.

6. Click *Create Program*.

Task overview: Learning Programs: Bundled Courses in a Syllabus [page 258]

Related Information

Adding Attributes to Programs [page 261]
Creating Agendas for Learning Programs [page 263]
Adding Items to Learning Program Agenda [page 264]
Learning Programs Basic Settings [page 266]
Viewing the Assignment Profiles that Assign a Program [page 269]
Translating Learning Program Titles and Descriptions [page 270]
Associating Learning Programs with SAP Jam Groups [page 271]
Adding Learning Program to Libraries [page 272]

9.2 Adding Attributes to Programs

Add competency and skill attribute types to programs so that when learners complete a program, they build the associated attributes.

Prerequisites

- For users who have enabled Talent Intelligence Hub, ensure you've migrated attributes.
- For users who have enabled Job Profile Builder, ensure you've imported competencies from Job Profile Builder.
- For users who have enabled Job Description Manager, ensure you've imported competencies from Job Description Manager.

Context

You can also run*Item Connector* to add attributes and ratings to multiple programs.

- Job Description Manager or Job Profile Builder users can provide competency ID in the **CPTY_ID** column of the item_competency_data.txt file to map competency with a program.
- Talent Intelligence Hub users can provide attribute ID in the **CPTY_ID** column of the item_competency_data.txt file to map attributes with a program. You can also use the connector to update ratings associated with an attribute.

> → Remember
>
> - Talent Intelligence Hub users can add attributes of type competency and skill to programs. Job Description Manager and Job Profile Builder users can find and add **only** competencies to prgrams.

- If the proficiency rating scale isn't configured in Center of Capabilities, the rating receives a default five-point proficiency level scale. **This configuration applies only to customers who are migrating from Center of Capabilities**. The default proficiency level scale is configurable. However, you can't modify the default scale after you enable *Growth Portfolio* in your tenant.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Programs*.
2. Search and open a program.
3. In *Attributes*, choose the edit icon to add attributes.
4. Choose *Add*.
5. Search and find the attributes that you to associate.
6. Select one or more attributes, and choose *Add*.
7. Choose *Done*.
   Attributes are added to the list. For each attribute, the lowest rating level (one) is assigned by default.
8. **Optional:** From the *Rating* dropdown corresponding to the attribute, choose a rating that learners earn if they complete the course.
9. Choose *Save*.

Results

The attributes are added. You can also remove associated attributes from the program, if necessary. From the list, select the *Select to Remove* checkbox for the attributes that you want to remove and then choose *Save*.

Task overview: Learning Programs: Bundled Courses in a Syllabus [page 258]

Related Information

Adding Learning Programs [page 259]
Creating Agendas for Learning Programs [page 263]
Adding Items to Learning Program Agenda [page 264]
Learning Programs Basic Settings [page 266]
Viewing the Assignment Profiles that Assign a Program [page 269]
Translating Learning Program Titles and Descriptions [page 270]
Associating Learning Programs with SAP Jam Groups [page 271]
Adding Learning Program to Libraries [page 272]
Scheduling Attributes Synchronization Process [page 1261]
Scheduling Capabilities Synchronization Process [page 1261]
Migration of Learning Competencies to Center of Capabilities [page 1356]

9.3 Creating Agendas for Learning Programs

Create agendas for programs to define the activities that take place during the program.

Context

Agendas group and order learning activities for a program. For example, you can create an agenda that includes online videos, courses, writing exercises.

- You can group activities with sections. For example, you can put all videos together and then group each course with its writing exercise.
- You can order activities by placing some sections earlier in the agenda and some activities earlier in the section. If order is critical to your agenda, be sure to check the progress restriction that you set on the program.

> **Note**
>
> Do not add more than 100 activities in an agenda.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Programs*.
2. Search for the program that you want to build an agenda for or add a new program.
3. With the program open, click *Edit*  in the *Agenda* tile.
4. To add sections, go to the *Add sections* area.

Field	Description
[number] / 100	You can have a maximum 100 sections in your program. Type a number of the section that **you** want to add. For example, if you type **3**, then you add a section in the third position.
[number] [weeks | days | no duration] each	In the number box, type the number of days or weeks that users should have to complete the section. In the weeks, days, or no duration list, select the unit of measure for the number. If you select no duration, you do not need to provide a number.

A section is a group of activities under a title. You edit the title after you add the section. You can translate the title for users of different languages.

Next Steps

To add activities, go to *Add Activities*.

Task overview: Learning Programs: Bundled Courses in a Syllabus [page 258]

Related Information

Adding Learning Programs [page 259]
Adding Attributes to Programs [page 261]
Adding Items to Learning Program Agenda [page 264]
Learning Programs Basic Settings [page 266]
Viewing the Assignment Profiles that Assign a Program [page 269]
Translating Learning Program Titles and Descriptions [page 270]
Associating Learning Programs with SAP Jam Groups [page 271]
Adding Learning Program to Libraries [page 272]

9.4 Adding Items to Learning Program Agenda

Add learning items to a program agenda to track users' completion.

Context

Add items to a program agenda to set up the sequence of learning that users experience at runtime and track completion at the learning item level. For example, you might want a user to complete a Workplace Safety learning item as part of an onboarding program.

Programs that include items which have prerequisites allow a user to bypass the completion of the prerequisites unless the system is configured to enforce item-level prerequisites or approvals. A user can enroll in a class that has prerequisites because within the program, the items are set up to be completed in a sequential order based on item completion or a given schedule, and that sequence is suggested rather than enforced.

When you create a program's agenda and add items, think about how you want to structure the timeline of the program: What should users experience and in what order? How long should the first experience take?

Add links, text, and HTML activities to direct users to view online content. You can also add external courses to program agendas when you want to add Open Content Network courses to your program.

Procedure

1. Go to *Learning Activities* > *Programs*
2. Select *Edit*  in the *Agenda* tile.
3. For a scheduled or duration-based program, provide the number of sections and its duration, then select *Add*.
4. To add activities, go to *Add Activities*.

> **Note**
>
> When adding an activity, there are two activity settings that control how the user completes it. There is a required checkbox, which controls whether the activity is required for program completion. There is also the Learning History Credit day(s) input box, which grants completion of an activity as long as it was completed within a number of days prior to program assignment. If the Learning History Credit day(s) is left blank or a 0 value is provided, it will grant completion if the activity was completed on the day the program was assigned.

5. Select *Instructor-Led* to add an instructor led course that takes place at a scheduled time.
6. Select *Online Only* to add an online course that users launch from a link in their assignments tile.
7. Select *Instructor-Led with Online Content* to add a course that is blended, with some sections take place online and some sections take place at a scheduled time with an instructor.

> **Note**
>
> When adding an *Instructor-Led* or *Instructor-Led with Online Content*course to a scheduled program, adding a specific class is required. When a user enrolls in the specified class, the registration close date is ignored and allows the user to enroll as long as there are seats remaining. If a user attempts to enroll in a class that has reached the maximum capacity and allows waitlisting, the user won't be able to waitlist.

8. Select *Other* to add a learning item that doesn't fit into the categories above. For example, you can add an acknowledgment for reading a book.
9. Select *External Course* to search for and add Open Content Network courses.

   External Courses are differentiated in the agenda. You know that you're adding a link to an external content server at the Open Content Network provider as opposed to your Preferred Content Solutions server.
10. Select *Link* to add a link. Enter the following information:

Field	Description
Title/Description	Enter a title and description to help users understand what happens when they click the link. For example, if the link contains a video, you might tell users to adjust their audio settings. You can communicate to them about other components of the learning experience, such as surveys.
URL	Specify the URL that directs the user to the correct page. We recommend that you test the link as the user would experience it and copy it from the browser into the Enter URL box.
Required	Select *Required* to require the user click the link to complete the program.

11. Select *Text* or *HTML* to add text or HTML. Enter the following information:

Field	Description
Title/Description	Describe what the users read at run time. In HTML activities, you can use HTML to format your text. In text activities, you can enter plain text.
Required	Select *Required* to require a user open the HTML or text activity and view it to complete the program.

The system can't know if users comprehend what they read, but it can know if users clicked to view the content. To test understanding of required links, text and HTML, consider adding an *Exam Object* .

Task overview: Learning Programs: Bundled Courses in a Syllabus [page 258]

Related Information

Adding Learning Programs [page 259]
Adding Attributes to Programs [page 261]
Creating Agendas for Learning Programs [page 263]
Learning Programs Basic Settings [page 266]
Viewing the Assignment Profiles that Assign a Program [page 269]
Translating Learning Program Titles and Descriptions [page 270]
Associating Learning Programs with SAP Jam Groups [page 271]
Adding Learning Program to Libraries [page 272]

9.5 Learning Programs Basic Settings

The basic settings of a learning program control its behavior and basic attributes.

This field...	...Is used as follows
Type	There are three program types that are different based on the time range in which the user must complete it. Scheduled, Duration-based, and Open-ended programs. The program type is set when you add programs and can't be changed during editing because there are time related rules it must follow. **Note** On assignment of a scheduled or duration-based program, the program's start date/time and end date/time is displayed in the learner's preferred time zone.

This field...	...Is used as follows
Status	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.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Assignment Type	An assignment type informs how critical a user's assignment is to the user because each assignment type can be associated with a priority. Even if an assignment type is **not** associated with a priority, users generally understand that an assignment whose type says it is "required" demands their attention more than one that is "optional." Assignments are enumerated in *References* > *Manage Users Learning* > *Assignment Types*. They are visible to the user and can be localized.
Completion Status	Completion status is a central element of SAP SuccessFactors Learning. It determines whether your users receive credit for their courses and if they receive follow up evaluations or an approval process. For example, when learning administrators record learning for an employee, they can record a completion status of “pass” or “fail”. To create structure around completion status, SAP SuccessFactors Learning uses item types. Item types are a category of course that makes sense for your company (for example, “on the job training” or “certification course”). Each item type can have one or more completion status that you define. For example, a certification item type might have strict completion status of pass and fail, but a professional development item type might have completion status of pass, fail, and incomplete. → Tip Keep your list of completion statuses small to avoid complexity in your system. Many companies can use simply “pass” and “fail”.

This field...	...Is used as follows
Progress Restriction	Progress restriction controls how users navigate the program. It's particularly important if ordering is important in your program. You can decide to reveal new sections when the previous section is complete or you can choose to reveal sections at a set time.
Hours	This is the amount of time that a user should expect to spend on the program. Users can see the hours and use them to decide if they have enough spare time on top of their workloads to engage in the program.
Completion Points	Completion points are the amount of points that we report to the gamification server when users complete the training. The gamification server calculates the points to return badges, status, and other social learning features.
Enable User Ratings	If selected, users can rate the program in the library.
Certificate Template	This is the template for users' completion certificates. The template sets the look and feel of the certificate that users see when they complete the program.
Source	In SAP SuccessFactors Learning, *Sources* identify the entity where the training originated. Different companies use source differently, but examples include the developer of a course, the organization or regulatory body that requires the item, or the Open Content Network (OCN) partner. For example, if you import courses from Skillsoft, you can add it as a source. Learners can filter their course search results by your sources. For example, they can filter their results by all Skillsoft courses or all LinkedIn Learning courses. You typically import learning item sources during implementation and then review them periodically. To see your learning item sources, go to SAP SuccessFactors Learning administration and then go to *References* > *Learning Activities* > *Sources*. You associate the sources with training in (for example) *Learning Activities* > *Items* > *Summary tab*.
Image URL/File	These are different ways that you can add an image to help users orient themselves to the program.
Contact's Email	The email address of someone who is responsible for the program.

This field...	...Is used as follows
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.

Parent topic: Learning Programs: Bundled Courses in a Syllabus [page 258]

Related Information

Adding Learning Programs [page 259]
Adding Attributes to Programs [page 261]
Creating Agendas for Learning Programs [page 263]
Adding Items to Learning Program Agenda [page 264]
Viewing the Assignment Profiles that Assign a Program [page 269]
Translating Learning Program Titles and Descriptions [page 270]
Associating Learning Programs with SAP Jam Groups [page 271]
Adding Learning Program to Libraries [page 272]

9.6 Viewing the Assignment Profiles that Assign a Program

View the assignment profiles that assign a program when you want to know how the program gets automatically assigned to users.

Context

You often want to know how programs are assigned to users. Although programs are sometimes assigned directly, they are more often automatically assigned by an assignment profile. The automatic assignments are also more difficult to troubleshoot. You can start by looking for all assignment profiles that automatically assign the program.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Programs*.
2. Find and open the program that you want to investigate.
3. Expand *Assignment*.

Task overview: Learning Programs: Bundled Courses in a Syllabus [page 258]

Related Information

Adding Learning Programs [page 259]
Adding Attributes to Programs [page 261]
Creating Agendas for Learning Programs [page 263]
Adding Items to Learning Program Agenda [page 264]
Learning Programs Basic Settings [page 266]
Translating Learning Program Titles and Descriptions [page 270]
Associating Learning Programs with SAP Jam Groups [page 271]
Adding Learning Program to Libraries [page 272]

9.7 Translating Learning Program Titles and Descriptions

Translate learning program titles and descriptions so that employees an see them in their own language.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Programs*.
2. Open the program that you want to translate.
3. Click .
4. Enter or edit the translated text for the language you're translating.
5. Click *Save*.

Task overview: Learning Programs: Bundled Courses in a Syllabus [page 258]

Related Information

Adding Learning Programs [page 259]
Adding Attributes to Programs [page 261]
Creating Agendas for Learning Programs [page 263]
Adding Items to Learning Program Agenda [page 264]
Learning Programs Basic Settings [page 266]
Viewing the Assignment Profiles that Assign a Program [page 269]
Associating Learning Programs with SAP Jam Groups [page 271]
Adding Learning Program to Libraries [page 272]

9.8 Associating Learning Programs with SAP Jam Groups

Associate learning programs with SAP Jam groups to create a space for users in the program to share knowledge.

Prerequisites

SAP Jam is licensed separately and you need a license to add the groups to programs. You also need to integrate SAP Jam to SAP SuccessFactors Learning.

Context

Associate SAP Jam groups with programs to create a space for users in the program to access content, discuss events, and other information. If you provide links into SAP Jam groups in the program agenda, users can visit the SAP Jam groups and join them independently.

When you associate a new SAP Jam group with the program, you can define the group settings that affect SAP SuccessFactors Learning. After creating the group or associating it with the program, you can edit more settings.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Programs*.
2. Find and open the program that you want to associate with a group.
3. In *Jam Groups*, click *Edit*.
4. Find and add the group that belongs with this program.

Task overview: Learning Programs: Bundled Courses in a Syllabus [page 258]

Related Information

Adding Learning Programs [page 259]
Adding Attributes to Programs [page 261]
Creating Agendas for Learning Programs [page 263]
Adding Items to Learning Program Agenda [page 264]
Learning Programs Basic Settings [page 266]
Viewing the Assignment Profiles that Assign a Program [page 269]
Translating Learning Program Titles and Descriptions [page 270]
Adding Learning Program to Libraries [page 272]

9.9 Adding Learning Program to Libraries

Add learning programs to catalogs so that users can find them in their catalogs and participate in the programs.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Programs*.
2. Find and open the program that you want to add to libraries.
3. Go to *Publishing* and then choose *Add*.
4. Search for the libraries or categories you want to associate with the program, and choose the *Results* tab.
5. Select your choice and choose *Add*.
6. Choose *Done*.

Task overview: Learning Programs: Bundled Courses in a Syllabus [page 258]

Related Information

Adding Learning Programs [page 259]
Adding Attributes to Programs [page 261]
Creating Agendas for Learning Programs [page 263]
Adding Items to Learning Program Agenda [page 264]
Learning Programs Basic Settings [page 266]
Viewing the Assignment Profiles that Assign a Program [page 269]
Translating Learning Program Titles and Descriptions [page 270]
Associating Learning Programs with SAP Jam Groups [page 271]

10 Curricula: Bundled Courses in Qualification Tracks

A curriculum is a set of courses for which you want to closely track users' completion to make sure that they qualify for some standard set by your company, your organization, or a regulatory body that oversees you.

A curriculum is a set of one or more courses (learning items) that users must successfully complete to be qualified or remain qualified to do a thing or be a thing. For example, you might have a set of courses that your employees must complete to be allowed to lead an off-site retreat. Because of the legal issues of responsibility, you want to closely track users' completion. Or, especially in industries like food and drug, nuclear, or other high risk enterprises, you might be regulated by an organization (the Food and Drug Administration in the United States, for example). You want to closely track that users have been trained to handle food and drugs, nuclear material, and so on.

Curricula also offer extensive rules to provide some flexibility for how users reach their qualification. You can, for example, create a curriculum for your employees to stay current with network security. But because your employees come from all backgrounds (some managers, some salespeople, some Information Technology (IT) people), you might want to give them some flexibility when they choose courses. A salesperson might want a course called "Network Security at Customer Sites" but a manager might want a course called "Helping your Team Keep a Secure Network." Furthermore, you might want your IT employees to take these sorts of high-level courses but also deep-dive into the technical details of a secure network. You can construct these kinds of scenarios with curricula.

Because you can construct complex scenarios with curricula, they can be complex to implement. If you want to simply assign a group of courses to users, you don't want to create variations on assignment, and you do not need close tracking of completion, you should consider a program.

10.1 Qualification Strategies in SAP SuccessFactors Learning

Before you create curricula to manage users' qualifications, consider the components of your strategy.

When you approach your curriculum qualification strategy, the flexibility of SAP SuccessFactors Learning can be overwhelming, but you can design a qualification strategy that fits your needs by thinking through these questions.

Do you Need Retraining as Part of your Qualification Strategy?

Retraining means that users must periodically complete the same course. For example, users might need to retrain on CardioPulmonary Resuscitation (CPR) every year. You would say that your qualification strategy has an annual retraining period for CPR.

- If you need retraining in your qualification strategy, then you can use curricula to create a retraining system.
- If you do **not** need retraining, consider using a learning program. Learning programs are simpler to create and manage, but you give up retraining.

How Easy Should it Be for Users to Lose their Qualification?

You can create a qualification system that forces users to be incomplete even if they are completing an assignment outside of normal curriculum assignment: for example, if they retake a course optionally before it is due for completion. If you select *Force Incomplete* on a curriculum or on a substitute for a learning item, then even if users pass a course the first time, if they decide to take it again before their due date and fail it, then they are forced into an incomplete status for the curriculum.

How Much Flexibility do you Want to Give Users?

You can give users some flexibility to meet their qualifications:

- By default, to be considered complete in a curriculum, a user must complete all required content in the curriculum by the required date.
- You can create choices for users to, for example, complete one of a subset of three learning items in the curriculum or complete a number of contact hours from a pool of learning items. You create these more nuanced requirements by creating **learning requirements** and then attaching them to the curriculum.
- You can offer users substitute learning items. For example, users can enroll into a more advanced fire safety course as a substitute for a less advanced fire safety. Or, you can allow users to enroll into pool lifeguard course that includes certification for Cardiopulmonary Resuscitation (CPR) as a substitute for a course that teaches only CPR (and not the water rescue parts of the pool lifeguard course). Because the goal is be certified in CPR, it doesn't matter if the certification comes from a lifeguarding course or from a CPR certification course. You crate substitutes on learning items.

How Much Credit do you Want to Give Users for Past Completion?

For each assignment in a curriculum, you can look back at users' learning completions and give them credit for recently completed assignments. For example, you can say that if users completed their CPR certification in the last year, they should get credit for it in the current curriculum. You decide how far back SAP SuccessFactors Learning should look for completions.

How to Choose Between Curricula and Programs [page 275]
When you want to user group learning into a syllabus, you can use either programs or curricula.

Advantages of Programs [page 275]
Programs are designed to be both flexible and structured.

Advantages of Curricula [page 276]
Curricula are designed to be strict for compliance, regulators, and audits.

Curricula and Programs Feature Comparison [page 277]
Use this table to compare individual features of the system and to understand how the feature works with curricula and how it works with programs.

Related Information

How to Choose Between Curricula and Programs [page 275]

10.1.1 How to Choose Between Curricula and Programs

When you want to user group learning into a syllabus, you can use either programs or curricula.

When you want to set up a user group of learning assignments for users, you can choose to create programs or to create curricula. Each has their strengths, but in general, the difference is a about compliance:

- If your courses lead to compliance through a regulator who audits you, choose curricula.
- If your courses don't lead to compliance through a regulator but are a syllabus of courses, choose programs.

Compliance applies to regulated industries, like life sciences. An auditor can look through a company's training entities to check that employees have been properly certified for their jobs. If an employee isn't certified, then the regulator can fine the company.

Parent topic: Qualification Strategies in SAP SuccessFactors Learning [page 273]

Related Information

Advantages of Programs [page 275]
Advantages of Curricula [page 276]
Curricula and Programs Feature Comparison [page 277]

10.1.2 Advantages of Programs

Programs are designed to be both flexible and structured.

Learning programs afford flexibility to organizations that want to design a timeline or a syllabus of learning. For example, during an on-boarding program, an organization would want to provide users with a link to a welcome video from the company CEO. The organization isn't interested in tracking users' correct viewing of the document link, or testing the users after they've viewed it to assure that they can be certified. Instead, the organization would like to order the content so that it makes sense. They want the welcome video to come first.

Programs have tracking capability at the cost of a little more configuration. Your learning administrators can create a learning item (a trackable unit of learning) in a program to track who has completed that learning item. Continuing the on-boarding example, an organization would want to track users' completion of their employee handbooks: they would want users to acknowledge that they've received the handbook. The organization can create a handbook learning item and assign it to the program, which in turn assigns it to the users in the program.

We created programs because we found that some customers were using curricula to group courses into a syllabus, but the customers weren't regulated. Instead, they wanted to create a structured learning experience for

users, but they wanted it to be flexible. They wanted structured learning experiences like an on-boarding program or a company policy/ethics program. Because curricula are intentionally designed to do the opposite, customers were frustrated with the rules and rigidity of curricula.

Parent topic: Qualification Strategies in SAP SuccessFactors Learning [page 273]

Related Information

How to Choose Between Curricula and Programs [page 275]
Advantages of Curricula [page 276]
Curricula and Programs Feature Comparison [page 277]

10.1.3 Advantages of Curricula

Curricula are designed to be strict for compliance, regulators, and audits.

We designed curricula with compliance in mind: Curricula support detailed tracking of compliance and qualifications for highly regulated industries. If a regulator can fine you because an auditor discovers that your worker isn't certified, then curricula are designed for you.

If you need workers to pass learning audits, then you need strict standardization. Curricula are designed to require every user to complete their assigned curriculum in the same exact way as all other users assigned the curriculum. They face the same retraining rules, the same prerequisite rules, and the same schedule.

Designing curricula is highly flexible. You can design a curriculum with different retraining triggers and retraining periods, with unique prerequisite rules, and with different requirements. But after you implement the curricula – after you assign it to the first user – the curriculum becomes rigid to assure standardization: every user must follow the same rules as you designed the rules.

If you're regulated and audited, you want your compliance system to be rigid during its implementation. If you aren't regulated, however, that rigidity becomes a burden.

Parent topic: Qualification Strategies in SAP SuccessFactors Learning [page 273]

Related Information

How to Choose Between Curricula and Programs [page 275]
Advantages of Programs [page 275]
Curricula and Programs Feature Comparison [page 277]

10.1.4 Curricula and Programs Feature Comparison

Use this table to compare individual features of the system and to understand how the feature works with curricula and how it works with programs.

Feature	Curricula	Programs
Learning Item Prerequisites	Govern when a user can participate in the learning item by checking to see if the user has completed the prerequisites.	Any prerequisites set at the learning item are ignored for programs by default. Can be configured to require completion of item-level prerequisites before a learner can participate in the learning item within a program.
Learning Item Approvals	Govern when a user can participate in the learning item by seeking approval (for example, from a supervisor).	Any approvals set at the learning item are ignored for programs by default. Can be configured to require item-level approvals before a learner can participate in the learning item within a program.
Learning Item Due Dates	Govern when a learning item is due.	Any due date set at the learning item level is ignored. Due dates are set implicitly based on the duration of the program.
Completion and Compliant	In curricula, a user can be compliant but not complete and that state can change over time for reasons of retraining.	In programs, users have either completed or not completed the program.
Certificate of Completion	Users can only obtain certificates of completion at the learning item level, not at the curricula level.	Users can receive a certificate of completion for the program.
Learning Content	Learning content must be internal to the Learning Management System (LMS): Learning items and other curricula.	Learning content can either be internal (items) or external (links, or custom activities).
Retraining	Curricula fully support retraining to stay current on compliance.	Programs don't support retraining. If you want a user to repeat a program, you must assign it again.
Credit for past completion	Users can obtain credit for past item completions based on a curriculum-level configuration set by the Learning Administrator.	Users can obtain credit for past item completions based on an item-level configuration set by the Learning Administrator.
Order of Assignments	All learning items are assigned at once with different due dates so that users can see the entire compliance regimen.	Activities are revealed to users as they enter the timeframe that the activities must be completed in so that users aren't overwhelmed.

Feature	Curricula	Programs
Requirement Pools	Curricula support requirement pools, which are a way of saying that user must complete requirements from a user group (pool) of requirements.	Not supported.
Change Control	Any change to a curriculum is driven to all users to enforce standardization of learning.	Changes can be sent to users who are currently assigned the program or you can grandfather the change so that only newly assigned users see the change.
Registration	Users must register for upcoming learning classes in the curriculum so that approvals can be met and prerequisites checked.	Users can be auto-registered into classes when they're assigned to a program.
Commerce	Supported.	Not Supported.

Parent topic: Qualification Strategies in SAP SuccessFactors Learning [page 273]

Related Information

How to Choose Between Curricula and Programs [page 275]
Advantages of Programs [page 275]
Advantages of Curricula [page 276]

10.2 Adding Curricula

Add curricula when you want to bundle a set of courses together and you want to create rules for completion and reassignment.

Prerequisites

Because curricula are a collection of learning items that a user must complete, before you create a curriculum, make sure that you've created the learning items that you need. If you need to search for learning items that you need for the curriculum, you can go to *Learning Activities* > *Items*.

Context

In most cases, you create curricula when your users need to maintain a qualification. For example, you might have an Information Technology (IT) security qualification that you want your users to maintain. When you create curricula, you can set up flexible requirements for those users to meet to reach their qualification, you can set retraining periods so that they keep their qualification current, and you can create grace periods that allow users to earn credit for qualification work they already completed.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Click *Add New*.
3. Complete the basic information about curricula.
4. Click *Add*.

1. Curriculum Details Fields [page 279]
   Curriculum details fields control the basic information and behavior of curricula.
2. Adding Content to Curricula [page 281]
   A curriculum is a collection of content that the user must complete to maintain a qualification, so you add content to the curricula to build the components of the qualification.
3. Adding Document Links to Curricula [page 313]
   Add document links to curricula if you have a document that matters to the curricula: for example, a document that describes the qualifications of a curriculum.
4. Adding Curricula to Libraries from the Curricula Workspace [page 314]
   Add curricula to libraries so that users can browse and search for the curricula inside their libraries.
5. Creating Curriculum Overview Pages [page 316]
   Create curriculum overview pages to add to the information users get when they click a curriculum title.

10.2.1 Curriculum Details Fields

Curriculum details fields control the basic information and behavior of curricula.

In *Curriculum Details*, you can view or edit the settings for a curriculum.

This field...	...Is Used as Follows
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.
Creation Date	When you create a new curriculum entity, the system automatically populates the *Creation Date* box with today's date.
Curriculum Type	If you associate the curriculum with a type, then the system categorizes the curriculum with other curricula of the same type (for example, Automotive, Health and Safety, Product Training, or Communication Skills). Associating the curriculum with a type is useful in searching for or reporting on all curricula of the same type.
Description	Because the content of this box appears in the user interface and in reports, we recommend that you enter a description that helps users identify the entity or its purpose.
Require E-Signature	With this checkbox selected, the system requires an electronic signature for every item in the curriculum when adding learning history for a user who is assigned to the curriculum. An e-signature is required even if you haven't enabled electronic signatures for that specific item entity (*Learning Activities* > *Items* > *Item Details*). When you enable electronic signatures, you force the system to prompt administrators, users, instructors, or others for an ID, a PIN, and sometimes a meaning code to proceed with a process (for example, adding learning history, submitting a performance review, or submitting a competency assessment) that requires an electronic signature. **Note** You must globally enable electronic signatures (*System Administration* > *Configuration* > *Global Application Settings*) to enable this control.

This field...	...Is Used as Follows
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator. For more information about how you can configure access to entities, see Security.
Subsequent Failures Reset Curriculum Status	When you select *Subsequent Failures Reset Curriculum Status*, the system calculates whether the status of the curriculum should be "Complete" or "Incomplete" based on a user's most recent attempt at completing **any one** item in the curriculum. If the user fails their most recent attempt at completing the item, then the system sets the status of the **entire** curriculum as "Incomplete". If you clear this checkbox, then the system sets the status of the curriculum to "Complete" if users complete any "For Credit" items within the required time frame.
Title	Because the text that you type in the *Title* box appears in the user interface, we recommend that you create a curriculum title that helps users understand what the group of items in the curriculum have in common. For example, if all items in the curriculum apply to office management, then the title could be **Office Management**.

Parent topic: Adding Curricula [page 278]

Next task: Adding Content to Curricula [page 281]

10.2.2 Adding Content to Curricula

A curriculum is a collection of content that the user must complete to maintain a qualification, so you add content to the curricula to build the components of the qualification.

Context

In *Learning Activities* > *Curricula* > *Contents* , you can add or remove one or more items, requirements, or subcurricula to or from the curriculum. When you add content to the curriculum, you can click the *Move Up* or *Move Down* buttons to change the display order of any item, requirement, or subcurriculum, to control how the content appears in the user interface. You might change the display order of the content to suggest to users which

item, requirement, or subcurriculum they should complete first when two or more pieces of content are due on the same day.

Changing the display order of content **doesn't** affect any due dates or sequence of due dates.

You can also click the *Expand* button for any piece of content to view more information from the item, requirement, or subcurriculum record.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum that needs new or edited components.
3. Go to Contents and click *Manage Content*.
4. Click  and then choose the kind of content you want to add.
    - Add items if that item is a part of the qualification, either directly (the user must complete that item) or through a requirement that asks the user to complete some number of items assigned to the curriculum.
    - Add requirements if you have set up requirements to grant some flexibility to completing the qualification (for example, some number of hours from all learning items or some number of learning items).
    - Add subcurricula if you structure your qualifications with sub qualifications (for example, to earn an IT qualification, users must earn an IT Security qualification, an IT Networking qualification, and so on.
5. When you're finished adding contents, close the edit view.

Next Steps

Although you can configure the contents and add them at the same time, we recommend that you build out the contents first and then return to configure them.

Task overview: Adding Curricula [page 278]

Previous: Curriculum Details Fields [page 279]

Next task: Adding Document Links to Curricula [page 313]

10.2.2.1 Creating a Requirement Group

Create a requirement group when you want to give users a choice: they can complete any of the requirements in the group to mark that assignment complete for the curriculum.

Prerequisites

Before you can create requirement groups, you must create the individual requirements. To create requirements, go to *Learning Activities* > *Curriculum Requirements*.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum with the requirements you want to group.
3. Click *Contents*.
4. Click *Manage Content*.
5. If you need to add the individual requirements, click  and then add the requirements that you want to group.
6. For the requirements that you want to group, select the requirements' *Select* box.
7. Click *Group Requirements*.

   You see *Create Requirements Group*.
8. Type a name for the group in *Group Description*.

   Use a group description that describes what the requirements accomplish together. For example, if the requirements are all about business ethics and together address your users' needs to address ethical situation, you could type **`Business Ethics`**.
9. Complete the retraining fields as you would for any other curriculum content.
10. Click *Create Group*.

Related Information

When to Use the "Number of Hours of Specified Hour" Learning Requirement Type [page 449]
When to Use the "Number of Hours of Specified Hour Type from Pool of Items" Learning Requirement Type [page 450]
When to Use the "Number of Items from Pool of Items" Learning Requirement Type [page 451]
Learning Requirements [page 453]
Adding Requirements [page 441]
Allowing Users to Fulfill a Requirement with Hours from Any Learning Item in a Curriculum [page 442]
Allowing Users to Fulfill a Requirement with Hours from a Subset of Learning Items in a Curriculum [page 444]

Allowing Users to Fulfill a Requirement with Learning Items from a Subset of Learning Items in a Curriculum [page 445]

10.2.2.1.1 Using Requirement Groups

Use these tips to build more complex requirement systems by combining requirements into groups.

Use requirement groups when you want to give your users some flexibility for completing requirements. For example, you can offer users a choice: they can enroll in five hours of introductory ethics courses to fulfill their ethics requirement **or** they can take at least one advanced ethics course from a pool of ethics courses. The relationship between the requirements within the group is an OR condition, so that when requirements are grouped the user has to satisfy but one of the requirements in the group.

Example: Giving Users Choice with Requirement Groups

In this example, the system has an accounting curriculum with three learning items in it:

- Accounting 100: 2 Credit Hours
- Accounting 200: 4 Credit Hours
- Accounting 300: 6 Credit Hours

It also has an introductory ethics sub-curriculum:

- Ethics 101: 2 Credit Hours
- Ethics 102: 3 Credit Hours
- Ethics 103: 3 Credit Hours

It also has an advanced ethics seminar sub-curriculum:

- Ethics 201: 2 Credit Hours
- Ethics 202: 3 Credit Hours
- Ethics 203: 3 Credit Hours

You can use requirement groups to give users an option: they can either take five credit hours from the introductory ethics sub-curriculum or they can take one of the three seminars offered as advanced ethics. You might do this if, for example, you retrain the users every year and require an ethics learning component every year. For users who see the same ethics classes year after year, they might want to take the option of the harder, but original, ethics seminar.

To create this option for users:

1. Go to *Learning Activities* > *Curriculum Requirements* and add a new requirement for the Ethics 101, 102, and 103 courses. You want users to complete five credit hours from among those courses.
   - Make the requirement type *Number of Hours of Specified Hour Type from Pool of Items*.
   - Add the requirement to complete five credit hours.
   - Add the Ethics 101, 102, and 103 courses to the pool of items in the requirement.
2. Go to *Learning Activities* > *Curriculum Requirements* and add a new requirement for the Ethics 201, 202, and 203 courses. You want users to complete at least one of those courses.

- Make the requirement type *Number of Items from Pool of Items*.
- Add the requirement to complete one course.
- Add the Ethics 201, 202, and 203 courses to the pool of items in the requirement.

3. Go to *Learning Activities* > *Curricula* > *Contents*, click *Manage Content*, and add the requirements above to the curriculum.
4. Select the requirements and then click *Group Requirements*.

With the requirements in a group, you can configure the requirements together. Users interact with the group as if it were one requirement: the initial assignments and retraining assignments, for example, apply to the group. Users can retrain themselves by either fulfilling the five credit hours for Ethics 101, 102, or 103, OR they can retrain themselves by completing one of the Ethics 201, 202, or 203 seminars.

> **Note**
>
> You can have other requirements outside the group. For example, you might also have a requirement that users complete 15 hours of accounting courses in this same curriculum. The accounting requirement doesn't affect the ethics requirement group.

10.2.2.1.2 Requirement Groups

Requirement groups allow you to connect requirements with an "or" operator: users can complete one requirement or a second requirement to complete the curriculum.

When you assign requirements in a curriculum, users must complete each individually assigned requirement to complete the curriculum. For example, you might want to say that users must complete ten credit hours (one requirement) and also complete one of three learning items (a second requirement). You don't want to consider the user complete for the curriculum until that have done both: completed ten credit hours **and** completed one of the three learning items. In this case, you don't want to create a requirement group: you want the curriculum to assess each requirement separately.

You might, however, want to give users a choice between more than one requirement. For example, for example, you might want to say that users can complete ten credit hours (one requirement) or they can complete one of three learning items (a second requirement). It doesn't matter to you which one they complete, as long as they complete one of the requirements, their assignment is complete. When users can complete one requirement **or** another requirement to complete the curriculum, those requirements are in a requirement group.

10.2.2.2 Creating an Annual Retraining Period Based on Users' Completion Events

Create an annual retraining period to require that users complete a learning item every year beginning on the date that they last completed the assignment.

Context

The overwhelming majority of our customers create curricula that require users to retrain on a learning item every year based on their last completion and they give users some initial period (usually 30 or 60 days from assignment) to complete the training the first time.

For example, they want to give users 60 days from the original curriculum assignment to complete the training the first time (the initial period) and then for each subsequent retraining, they want to require users to complete the training every year from the date of their last completion.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum you want to change.
3. Click *Contents*.
4. Click *Manage Content*.
5. For each individual assignment in the contents that users should retrain on annually, click its *Edit* link.
6. To set the initial and retraining periods, in the *Update Data for Curriculum Requirement for the Curriculum* area, set up your periods.

> **Note**
>
> When calculating required date, SAP SuccessFactors Learning counts full periods starting at the end of the current period. In this case, for day periods, it calculates starting at Midnight on the current day. Imagine a user who is assigned a curriculum on October 1 and has 15 days to complete the initial assignment. The calculation starts from 00:00 on October 2 (the next full day) and counts 15 days, giving you a required date of October 16 at 24:59:59 hours.

Setting	Value
Initial Number	Most customers choose a **`30`** or **`60`** day initial period. This gives users 30 or 60 days to complete the assignment the **first** time. Subsequent retraining is handled by retraining properties.
Initial Period	**`Days`**
Initial Basis	**`Event`**
Required Date Basis	**`Assignment Date`**

Setting	Value
Retraining Number	`365`
Retraining Period	`Days`
Retraining Basis	`Event`

7. In *Previous Completions*, decide how far back in users' histories you want the system to look for completions.

   When a curriculum is assigned, SAP SuccessFactors Learning evaluates the learning history for the assigned users. If it finds a previous completion, then it marks the assignment complete. If you set up retraining, it also uses that completion date to calculate the next required date. To understand how far to look back in users' learning history for a completion, SAP SuccessFactors Learning uses the value in *Ignore Previous Completions Older Than*.

   - We recommend that you set a value for *Ignore Previous Completions Older Than* to limit how far SAP SuccessFactors Learning looks back for completions. We recommend a value because you want to prevent SAP SuccessFactors Learning from finding very old completions. For example, if a user who completed an item a very long time ago (for example, 5 years) and that item is now part of a curriculum that has yearly retraining assignments, then the new curriculum assignment shows up as being 4 years overdue.
   - A safe strategy is to select *Ignore Previous Completions Older Than* and set a number of days equal to the amount of days in your shortest period. For example, if you have a 30 day initial period and a 365 day retraining period (this is common), enable *Ignore Previous Completions Older Than* and set it to `30`.

8. In *Effective Date* decide when the assignment should take effect.

   Effective Date grandfathers changes into the curriculum. If you add a new assignment to the curriculum, and if you set the effective date into the future, then SAP SuccessFactors Learning allows users' curricula to remain complete until the effective date. Before the effective date, users who have a complete curriculum remain complete even if they haven't completed this assignment. After the effective date, if users have not completed the assignment, they are incomplete for the curriculum.

   > **Note**
   >
   > If an assignment's *Assignment Type* that makes the assignment required, then you must also provide an effective date so that SAP SuccessFactors Learning can calculate the status of the curriculum based on all required assignments.

   For example, imagine a user who has successfully completed all of the items in a curriculum and whose current status for that curriculum is **Complete**.

   - If you add a new item to the curriculum and set the effective date to a future date, then SAP SuccessFactors Learning sees the assignment as effective on that future date, skips the assignment when evaluating the completeness of the curriculum, and keeps the user's status **Complete**.
   - If you add a new item to the curriculum and set an effective date to a past date, then SAP SuccessFactors Learning sees the assignment as immediately effective, sees that the assignment is incomplete, and changes that user's status to **Incomplete**.

9. In *Assignment Type*, select how you want to define this assignment.

   We recommend that you add required assignment types only. If you add an optional assignment type, the user experiences it as required because curriculum assignments remain on users' learning plans indefinitely and has a required date based on the effective date. The only way for a user to clear an optional assignment made by a curriculum is to complete it (either complete it themselves or have a history record added on their behalf). As an alternative to adding optional assignments to a curriculum, you can add an assignment profile that looks for users who completed this learning item and then recommends the optional assignment.

> **Note**
>
> When you add assignment types, you also must add an effective date because the effective date calculates the required date.

10. Click *Apply Changes*.
11. Click *Return to Content Data*.

Next Steps

Repeat the process for all content that you want users to retrain on.

10.2.2.3 Creating an Annual Retraining Period Based on a Fixed Date

Create annual retraining based on a fixed date when all users must complete their qualification assignments on the same date, regardless of when it was assigned.

Context

Most customers want to create annual training periods based on users completion, but some customers need to create retraining periods based on fixed dates. For example, if a regulatory body enforces a deadline of April 15 for all training, regardless of when users received the assignment or when they were hired, you need to create an annual retraining period based on a fixed date of April 15.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum you want to change.
3. Click *Contents*.
4. Click *Manage Content*.
5. For each individual assignment in the contents that users should complete by the fixed date, click its *Edit* link.
6. To set the initial and retraining periods, in the *Update Data for Curriculum Requirement for the Curriculum* area, set up your periods.

> **Note**
>
> When calculating required date, SAP SuccessFactors Learning counts full periods starting at the end of the current period. In this case, for day periods, it calculates starting at Midnight on the current day. Imagine

a user who is assigned a curriculum on October 1 and has 15 days to complete the initial assignment. The calculation starts from 00:00 on October 2 (the next full day) and counts 15 days, giving you a required date of October 16 at 24:59:59 hours.

Setting	Value
Initial Number	Most customers choose a **365** day initial period, but you could use a different number. This is the window of time from the basis date that users can complete their initial assignment. For example, if *Basis Date* is April 14, users have 365 days from April 14 (April 15 of the next year) to complete their assignments.
Initial Period	**Days**
Initial Basis	**Calendar**
Required Date Basis	Ignore this setting.
Retraining Number	**365**
Retraining Period	**Days**
Retraining Basis	**Calendar**

7. In *Threshold*, decide a threshold after which users are added to the next initial period.

   Threshold is a number of days before the end of the initial period. If users receive this assignment before the threshold, they must complete it within the current initial period. If they receive this assignment after the threshold, they must complete it in the next initial period. For example, if the initial period is annual and ends on April 15, and the threshold is 15 days, then users who receive their assignments on April 11, 2009 (after the threshold) must complete their initial assignment by April 15, 2010 (the end of the next annual initial period). Users who receive their assignments on March 11 (before the threshold) must complete their initial training by April 15, 2009.

   If you select *Entire Period*, then the required date for the item will always be due at the end of the same period that it was assigned. For example, if the initial period is annual and ends on April 15, then even a user assigned on April 15 must complete the assignment that day.

   If you select *Days* and leave the value empty or blank, then SAP SuccessFactors Learning ignores the threshold setting. The required date for the item is at the end of the next full period. A user who receives an assignment between April 15, 2009 and April 15, 2010 must complete initial training by April 15, 2011 (the end of the next **full** period).

8. In *Previous Completions*, decide how far back in users' histories you want the system to look for completions.

   When a curriculum is assigned, SAP SuccessFactors Learning evaluates the learning history for the assigned users. If it finds a previous completion, then it marks the assignment complete. If you set up retraining, it also uses that completion date to calculate the next required date. To understand how far to look back in users' learning history for a completion, SAP SuccessFactors Learning uses the value in *Ignore Previous Completions Older Than*.

   - We recommend that you set a value for *Ignore Previous Completions Older Than* to limit how far SAP SuccessFactors Learning looks back for completions. We recommend a value because you want to prevent SAP SuccessFactors Learning from finding very old completions. For example, if a user who completed an item a very long time ago (for example, 5 years) and that item is now part of a curriculum that has yearly retraining assignments, then the new curriculum assignment shows up as being 4 years overdue.
   - A safe strategy is to select *Ignore Previous Completions Older Than* and set a number of days equal to the amount of days in your shortest period. For example, if you have a 30 day initial period and a 365 day retraining period (this is common), enable *Ignore Previous Completions Older Than* and set it to **30**.

9. In *Basis Date*, select the day **before** the fixed calendar date in the year that you want initial and retraining periods to begin.

   You select the day before because the calculations are based on midnight. The basis date is the date that SAP SuccessFactors Learning uses to calculate periods. A 365 day period with the basis date of April 14 is April 15 of the next year.

10. In *Effective Date* decide when the assignment should take effect.

    Effective Date grandfathers changes into the curriculum. If you add a new assignment to the curriculum, and if you set the effective date into the future, then SAP SuccessFactors Learning allows users' curricula to remain complete until the effective date. Before the effective date, users who have a complete curriculum remain complete even if they haven't completed this assignment. After the effective date, if users have not completed the assignment, they are incomplete for the curriculum.

    > ### Note
    >
    > If an assignment's *Assignment Type* that makes the assignment required, then you must also provide an effective date so that SAP SuccessFactors Learning can calculate the status of the curriculum based on all required assignments.

    For example, imagine a user who has successfully completed all of the items in a curriculum and whose current status for that curriculum is **Complete**.

    - If you add a new item to the curriculum and set the effective date to a future date, then SAP SuccessFactors Learning sees the assignment as effective on that future date, skips the assignment when evaluating the completeness of the curriculum, and keeps the user's status **Complete**.
    - If you add a new item to the curriculum and set an effective date to a past date, then SAP SuccessFactors Learning sees the assignment as immediately effective, sees that the assignment is incomplete, and changes that user's status to **Incomplete**.

11. In *Assignment Type*, select how you want to define this assignment.

    We recommend that you add required assignment types only. If you add an optional assignment type, the user experiences it as required because curriculum assignments remain on users' learning plans indefinitely and has a required date based on the effective date. The only way for a user to clear an optional assignment made by a curriculum is to complete it (either complete it themselves or have a history record added on their behalf). As an alternative to adding optional assignments to a curriculum, you can add an assignment profile that looks for users who completed this learning item and then recommends the optional assignment.

    > ### Note
    >
    > When you add assignment types, you also must add an effective date because the effective date calculates the required date.

12. Click *Apply Changes*.
13. Click *Return to Content Data*.

10.2.2.4 Curriculum Content Settings

Curriculum content settings control how SAP SuccessFactors Learning calculates required dates for assignments in curricula.

This field...	Is Used as Follows...
Initial or Retraining Number	SAP SuccessFactors Learning uses the value that you set for *Initial or Retraining Number* (for example, 6) with the value that you select from the *Initial* or *Retraining Period* list (for example, Months) to determine how often and when to set the required date for the item in the curriculum.
Initial or Retraining Period	SAP SuccessFactors Learning uses the value that you set for *Initial or Retraining Number* (for example, 6) with the value that you select from the *Initial or Retraining Period* list (for example, Months) to determine how often and when to set the required date for the item in the curriculum.
Initial or Retraining Basis	If you select *Event*, then SAP SuccessFactors Learning gives every user the same amount of time to complete the training, regardless of when the item is assigned. For example, every user must complete the training assignment within 6 (the value you set for the *Initial Number* box) months (the value you selected from the *Initial Period* list) of the "event." The first event is when SAP SuccessFactors Learning assigns the item through the associated curriculum; subsequent event dates are set when the user completes the learning item. If you select *Calendar*, then SAP SuccessFactors Learning gives every user the same required date in each period to complete the training. Depending on when SAP SuccessFactors Learning assigns the curriculum's content, some users might have a greater amount of time to complete the training than others. However, no user has less than, for example, 6 (the value you set for the *Initial Number* box) months (the value you selected from the *Initial Period* list) to complete the training.

This field...	Is Used as Follows...
Previous Completions	When a curriculum is assigned, SAP SuccessFactors Learning evaluates the learning history for the assigned users. If it finds a previous completion, then it marks the assignment complete. If you set up retraining, it also uses that completion date to calculate the next required date. To understand how far to look back in users' learning history for a completion, SAP SuccessFactors Learning uses the value in *Ignore Previous Completions Older Than*. • We recommend that you set a value for *Ignore Previous Completions Older Than* to limit how far SAP SuccessFactors Learning looks back for completions. We recommend a value because you want to prevent SAP SuccessFactors Learning from finding very old completions. For example, if a user who completed an item a very long time ago (for example, 5 years) and that item is now part of a curriculum that has yearly retraining assignments, then the new curriculum assignment shows up as being 4 years overdue. • A safe strategy is to select *Ignore Previous Completions Older Than* and set a number of days equal to the amount of days in your shortest period. For example, if you have a 30 day initial period and a 365 day retraining period (this is common), enable *Ignore Previous Completions Older Than* and set it to **30**.

This field...	Is Used as Follows...
Required Date Basis	If you select *Assignment Date* as the required date basis, then SAP SuccessFactors Learning calculates all of the completion statuses and next assignment dates based on when the curriculum was assigned to a user. Assignment date is the more common required date basis for event driven assignment. If a user is assigned a curricula using Hired Date as the Required Date Basis but does not have a Hired Date, the system will provide them additional time to complete a course. The user's Required Date will be calculated to be the Initial Period plus an additional Initial Period. **Note** Most customers use *Assignment Date* as their required date basis because it's the most accurate and flexible configuration. You can assign curricula based on hire date, for example, so using hire date isn't necessary and can even break your configuration later. If you decide to assign the curricula when individual contributors become managers, you only need to change the assignment profile, not the curriculum. The advantage to using hire date is automatic recalculation if users' hire dates change. If you select *Hire Date* as the required date basis, then SAP SuccessFactors Learning uses the value in *Hire Date* on the users' entities to calculate completion status and next assignment dates. If any user's hire date changes (for example, an administrator changes it manually or SAP SuccessFactors Learning changes it through a connector), then SAP SuccessFactors Learning automatically recalculates required dates.

This field...	Is Used as Follows...
Threshold	If you select *Calendar* as the initial basis, then you can also set a threshold for the **initial assignment** to complete training. If users are assigned earlier than the threshold, then they must complete the initial training by the next partial, initial period. If they're assigned after the threshold, then they're put into the **next** full initial period. For example, if the initial period is annual, the period ends on December 31, so users must complete their initial assignments on or before December 31. If the threshold is 30 days, then users assigned (for example) on November 15 must complete the initial assignment by December 31. Users assigned on December 15 (for example) are put into next year's period: their initial training is due on December 31 of the next year. If you select *Entire Period*, then the required date for the item will always be due at the end of the same period that it was assigned. For example, if the initial period is annual and ends on December 31, then even a user assigned on December 31 must complete the assignment that day. If you select *Days* and leave the value empty or blank, then SAP SuccessFactors Learning ignores the threshold setting. The required date for the item is at the end of the next full period. If you select *Days* and provide a value that is greater than zero, then SAP SuccessFactors Learning creates a date range: • The start date of the range equals the start date of the current period. • The end date of the range equals the start date plus the number of days that you entered for the *Threshold*. If the assignment date of the item **is within** that range, then SAP SuccessFactors Learning makes the required date for that item equal to the end of the **current period**. If the assignment date of the item **is after** that range, then SAP SuccessFactors Learning makes the required date for that item equal to the end of the **subsequent period**. **Note** Threshold affects only the required dates for initial assignments; it doesn't affect the periods or required dates for retraining assignments.

This field...	Is Used as Follows...
Basis Date	If the *Initial* or *Retraining Basis* is *Calendar*, then SAP SuccessFactors Learning uses the basis date to calculate the periods and, therefore, the item's required dates. If *Initial* or *Retraining Basis* is *Event*, then SAP SuccessFactors Learning doesn't use the value in the *Basis Date* box; instead, it uses the event date to calculate only the next period and, therefore, the item's next required date. If another "event" occurs, then SAP SuccessFactors Learning uses that event date to calculate the subsequent period and, therefore, the item's next required date.
Effective Date	*Effective Date* grandfathers changes into the curriculum. If you add a new assignment to the curriculum, and if you set the effective date into the future, then SAP SuccessFactors Learning allows users' curricula to remain complete until the effective date. Before the effective date, users who have a complete curriculum remain complete even if they haven't completed this assignment. After the effective date, if users have not completed the assignment, they are incomplete for the curriculum. **Note** If an assignment's *Assignment Type* that makes the assignment required, then you must also provide an effective date so that SAP SuccessFactors Learning can calculate the status of the curriculum based on all required assignments. For example, imagine a user who has successfully completed all of the items in a curriculum and whose current status for that curriculum is **Complete**. • If you add a new item to the curriculum and set the effective date to a future date, then SAP SuccessFactors Learning sees the assignment as effective on that future date, skips the assignment when evaluating the completeness of the curriculum, and keeps the user's status **Complete**. • If you add a new item to the curriculum and set an effective date to a past date, then SAP SuccessFactors Learning sees the assignment as immediately effective, sees that the assignment is incomplete, and changes that user's status to **Incomplete**.

This field...	Is Used as Follows...
Assignment Type	An assignment type informs how critical a user's assignment is to the user because each assignment type can be associated with a priority. Even if an assignment type is **not** associated with a priority, users generally understand that an assignment whose type says it is "required" demands their attention more than one that is "optional." When the assignment type is associated with a learning item in a curriculum, the assignment type determines whether or not the learning item must be complete for the curriculum to be complete: if the assignment type is set to required, then the item must be complete for the curriculum to be complete. We recommend that you add required assignment types only. If you add an optional assignment type, the user experiences it as required because curriculum assignments remain on users' learning plans indefinitely and has a required date based on the effective date. The only way for a user to clear an optional assignment made by a curriculum is to complete it (either complete it themselves or have a history record added on their behalf). As an alternative to adding optional assignments to a curriculum, you can add an assignment profile that looks for users who completed this learning item and then recommends the optional assignment. **Note** When you add assignment types, you also must add an effective date because the effective date calculates the required date.

10.2.2.5 Retraining in SAP SuccessFactors Learning Curricula

Retraining requires users to complete assignments periodically (for example, annually) to keep their qualification (complete an assigned curriculum).

For companies that maintain their qualifications in SAP SuccessFactors Learning, most have some concept of retraining: to remain qualified, users must demonstrate their understanding periodically. For example, you might want users to complete a CardioPulmonary Resuscitation (CPR) course every year: you want users to retrain on CPR annually.

In SAP SuccessFactors Learning, you can control the length of the retraining period, including a different length for an initial training period and all subsequent periods. You can also base the retraining on a fixed date or you can use the users' completion date in the current period to calculate the next period.

10.2.2.5.1 Retraining and Assignment in Curricula

If you define retraining for a learning item in a curriculum, then after it's assigned for the first time, it remains and assignment but retraining updates the required date of the learning item on their assignments.

If you add a learning item to a curriculum and if you define retraining for the learning item, then any users who are assigned the curriculum get the learning item on their assignments. Even after users complete the learning item, it remains an assignment. SAP SuccessFactors Learning recalculates the required date based on your configuration, but from your users' perspective, the learning item is permanently assigned.

To describe the experience, consider this example. If users are required to complete security retraining by February 1 every year, the security learning item remains permanently on their *My Assignments* tile. If they complete the training in January of 2018, the security learning item remains on their assignments, but the required date changes from "Required by February 1, 2018" to "Required by February 1, 2019".

Retraining takes effect **after** the learning item is assigned for the first time. For example, you can configure a learning item for retraining but without an initial assignment. Put another way, you assign the curriculum in June and require retraining every 365 days starting on January 1, but you tell SAP SuccessFactors Learning to allow the user to just start on January 1. You tell the system, "Don't worry about the time between June and January (the initial period), just start users in January.". In this case, the first time the user is assigned the learning item is on January 1. Before January 1, there's no required date and there's no retraining for that user in that curriculum.

Retraining is **not** a required part of assignment in curricula. For example, you can configure a learning item with an initial assignment but no retraining. These situations are rare, but building on the example above, you could assign a curriculum in June with an initial assignment due by January 1 **and** with no retraining rules. In this case, the assignment works like any other learning assignment: it drops from the users' assignments after they complete the assignment.

10.2.2.5.2 Curriculum Retraining Period Time Units

When you set up a curriculum retraining period, you select the unit of time that defines the period.

Curriculum retraining periods are measured in units of time (days, weeks, quarters, or years). You can say, for example, that users must retrain every 365 days to remain qualified or you can say that they must remain qualified every 1 year to remain qualified. The time units give you some flexibility to segment your retraining how you need to.

Unless you have a very compelling reason not to, we recommend that you use days because a day is always equal. The vast majority of our customers use day as their time unit.

10.2.2.5.3 How SAP SuccessFactors Learning Applies Completion When Users Complete Retraining After the Required Dates

When users don't complete their retraining assignments by their required dates, SAP SuccessFactors Learning must decide how to apply the completion.

If a user completes an item after its required date, then the system applies that completion to:

- The current period (if the basis is *Calendar*). The system can't allow a calendar-based assignment to have a due or required date that is anything other than the end of the current period. Therefore, to get the proper credit for a curriculum, the user must complete the item during its intended period.
- The current period (if the basis is *Event*). In an event-based assignment, the system can allow the period to extend until the next event occurs (when the user next completes the item). Therefore, after recording the event, the system sets up a new period and a new required date for the item based on this most recent completion.

> **Note**
>
> As an administrator, you can't change the status of a curriculum by manually changing the required date of any item that is in the curriculum. The system always uses the settings of the curriculum entity to determine the correct curriculum status.

10.2.2.5.4 Retaining Item Settings in Curricula During Item Revisions

You can retain initial and retraining assignment data of items in a curriculum during Item Connector revisions.

Context

The item connector updates the curricula to use the new revision by default after every revision. You can modify this behavior using the `retainCurriculaSettingsOnItemRevision` configuration property.

Procedure

1. Go to *Learning Administration* > *System Administration* > *Configuration* > *System Configuration*.
2. Locate and edit *CONNECTORS*.
3. In the *#Item Connector* section, set `retainCurriculaSettingsOnItemRevision` to **Y**.

   The setting retains existing curriculum information during connector-based item revisions, even when the values differ from the item-level settings. The default setting is set to `N`, which overwrites curricula-specific data during item revisions.

4. Choose *Apply Changes*.

Next Steps

When you revise an item through the Item Connector, the following fields on the *Curricula* > *Content* page are retained for items after revision:

- *Initial Period*
- *Initial Number*
- *Initial Basis*
- *Required Date Basis*
- *Retraining Period*
- *Retraining Number*
- *Retraining Basis*
- *Assignment Type*
- *Effective Date*
- *Basis Date*
- *Threshold*

10.2.2.6 Walk Through of Event-Based Period Assignment in SAP SuccessFactors Learning Curricula

Event-based period assignments include many abstract concepts, so using a concrete example can help you understand how those concepts apply to your business.

Event-based training sets period dates based on the date of one of two kinds of events:

- It sets the initial period based on the curriculum assignment event: the date that **this** curriculum is assigned to **this** user.
- It sets the retraining periods per content item in the curriculum based on the date that the user completed the last assignment. For example, if you use the most common curriculum configuration, event based and 365 days, then any time a user completes retraining content in the curriculum, their next required date is set 366 days into the future.

> ⓘ Note
>
> When calculating the next required date for a period, you always add one time unit, because the calculation is based on the midnight at the end of the current time unit. For example, if you set retraining periods 365 days, the effective retraining period is 366 days. It's 366 days because SAP SuccessFactors Learning calculates in full time units like full days: if a user completes an assignment at Noon, SAP SuccessFactors Learning ignores the time between Noon and Midnight and calculates the end of the next period from Midnight. The twelve hours between Noon and Midnight are **seen as** an extra day by users.

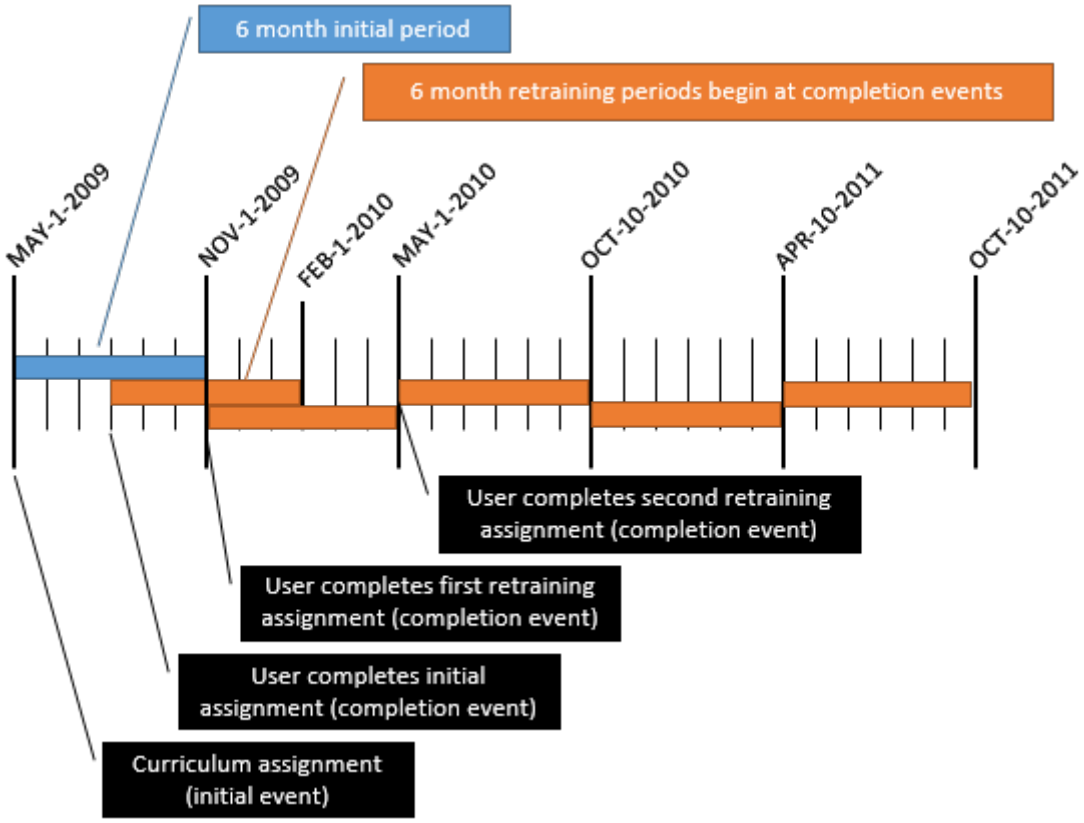
Whether users are late or early in their retraining assignments, they don't get extra time:

- When users are late, they **don't** get extra time to complete retraining. For example, if you say that retraining should occur every six months, and if it takes a user seven months to complete the learning item, the user is one month late. However, their next due date will be calculated six months from their completion date (the seven-month mark), giving them the full six months again to complete the learning item.
- When users are early, they **don't** get extra time to complete retraining. For example, if you say that retraining should occur every six months, and if it takes a user just one month to complete the learning item, the next required date is still calculated based on the user's completion event **not** the end of the existing period. Therefore, the user still has six months from their completion event to complete the retraining.

Event-Based Retraining Walk-Through, First Settings

Retraining Period Parameter	Value
Initial Number	6
Initial Period	Months
Initial Basis	Event
Threshold	Not available with event basis
Retraining Number	6
Retraining Period	Months
Retraining Basis	Event
Basis Date	Not needed with event basis
Effective Date	4/09/2009

The following time line can help you visualize how SAP SuccessFactors Learning calculates the initial training period and the retraining periods in this example.



Event-Based Item Assignment for Curricula

In this example, the initial period begins at the curriculum assignment event and the retraining periods begin at the individual users' completion events:

1. The curriculum (and therefore its contents) are assigned on April 10, 2009. SAP SuccessFactors Learning uses the initial number (6) and the initial period (months) to calculate the required date for the initial period. Because users must have a full period to complete their assignments, SAP SuccessFactors Learning calculates the initial period based on the start of the next full initial period unit (in this case, months). Therefore, if a user is assigned the curriculum on April 10, SAP SuccessFactors Learning gets the start of the next full time unit (May 1, 2009) and calculates six months from that date. The end of the initial period, therefore, is November 1, 2009.
2. Imagine that a user in this curriculum completes training (gets a completion event) on July 15, 2009. The user is entitled to a full period from this event to complete retraining. Therefore, SAP SuccessFactors Learning gets the start of the next retraining time unit (months), which is August 1, 2009. It then looks at the retraining number and gets 6. Six months from August 1, 2009 is the day before February 1, 2010. This user's required date for the content that they completed on July 15, 2009 is therefore Midnight on the last day of January, 2010.
3. Assume that this same user completes the content again on October 15, 2009. SAP SuccessFactors Learning uses the same rules (get next month, add six months, and set required date to Midnight the day before that date). The retraining period for that content is Midnight on the day before May 1, 2010.
4. In reality, most users wait until just before the next required date to complete their content. In the case of this user, the user completes the next learning event in April of 2010, so SAP SuccessFactors Learning calculates the next required date to October 10, 2010, and so on.

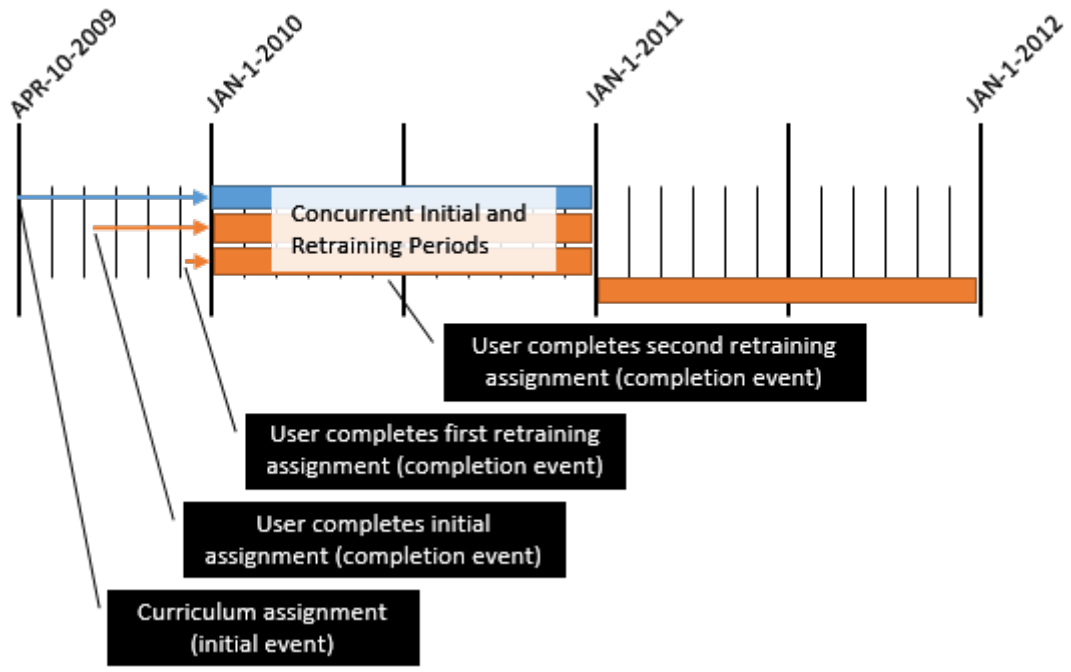
Why Long Period Units Aren't Recommended

Because each period begins on a completion event, and because SAP SuccessFactors Learning uses the start of the next retraining period for its calculations, we don't recommend long period units like years or even months. The longer the time period, the greater risk that you create concurrent periods. To understand why, consider a retraining period that uses a long period (time unit): years.

Event-Based Retraining Walk-Through, Year Periods

Retraining Period Parameter	Value
Initial Number	1
Initial Period	Years
Retraining Number	1
Retraining Period	Years

For this example, we demonstrate what happens when a user completes an event-based assignment before the start dates of the initial or retraining periods have started.



Event-Based Item Assignment with Initial Number/Period and Retraining Number/Period Changes - Years

1. Imagine that a user is assigned a curriculum on April 10, 2009. To calculate the initial period, SAP SuccessFactors Learning looks at the initial period time unit (years) and finds the start of the next full calendar year: January 1, 2010. It then gets the initial number (1) and calculates the initial period to end one year from January 1, 2010: the last day of 2010 (December 31, 2010).
2. Imagine that the user gets the assignment and completes the assignment on July 15, 2009. To calculate the first retraining period, SAP SuccessFactors Learning looks at the retraining period time unit (years) and finds the start of the next full calendar year: January 1, 2010 - the same date it found for the initial period. It then gets

the initial number (1) and calculates the first retraining period to end one year from January 1, 2010: the last day of 2010 (December 31, 2010) - again, the same day it found for the initial period.

3. Imagine that the user sees the assignment and completes it **yet again** before December 31, 2009. To calculate the second retraining period, SAP SuccessFactors Learning looks at the retraining period time unit (years) and finds the start of the next full calendar year: January 1, 2010 - the same date it found for **both** the initial period and the first retraining period. It then gets the initial number (1) and calculates the second retraining period to end one year from January 1, 2010: the last day of 2010 (December 31, 2010) - again, the same day it found for the initial period and the first retraining period.

   > ⓘ Note
   >
   > At this point, learning administrators are likely to get questions from the users: why have I completed this assignment twice and the required date won't change?

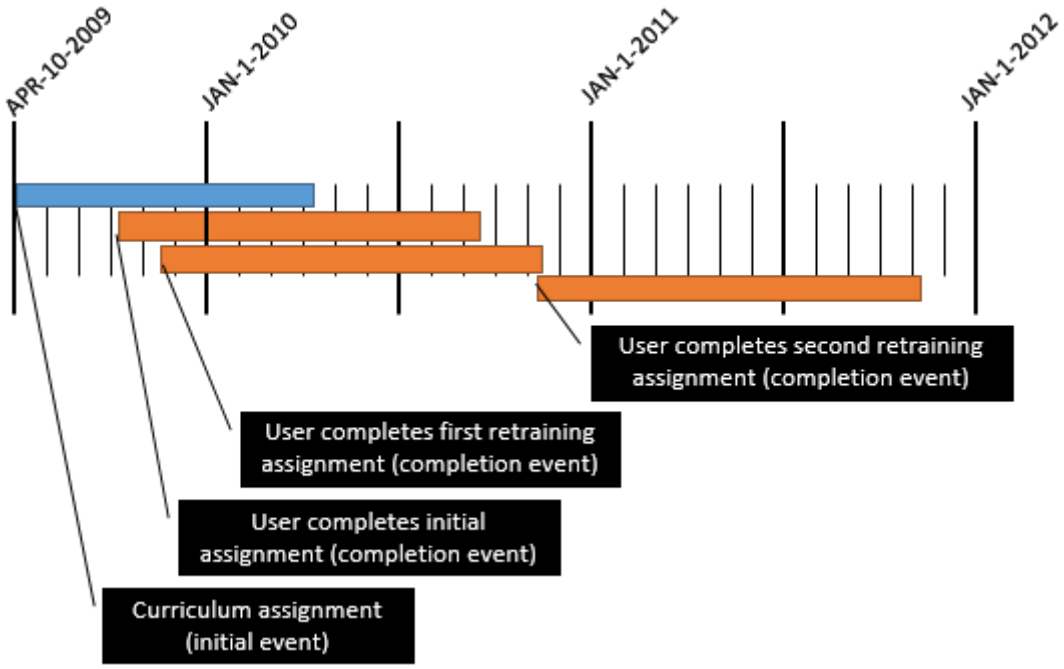
4. Imagine that now the user completes the assignment in the first half of 2010. To calculate the third retraining period, SAP SuccessFactors Learning looks at the retraining period time unit (years) and finds the start of the next full calendar year: January 1, 2011. It then gets the initial number (1) and calculates the second retraining period to end one year from January 1, 2011: the last day of 2011 (December 31, 2011).

Why Days Are the Recommended Period

Almost all customers configure their initial and retraining periods to be 365 days. To explain why, consider what happens when you shorten the period (time unit) from years to days and use the same completion event dates as the years example.

Event-Based Retraining Walk-Through, Day Periods

Retraining Period Parameter	Value
Initial Number	365
Initial Period	Days
Retraining Number	365
Retraining Period	Days



Event-Based Item Assignment with Initial Number/Period and Retraining Number/Period Changes - Days

1. Imagine that a user is assigned a curriculum on April 10, 2009. To calculate the initial period, SAP SuccessFactors Learning looks at the initial period time unit (days) and finds the start of the next full day: April 11, 2009 (at 00:00 hours). It then gets the initial number (365) and calculates the initial period to end one year from April 11, 2010.
2. Imagine that the user gets the assignment and completes the assignment on July 15, 2009. To calculate the first retraining period, SAP SuccessFactors Learning looks at the retraining period time unit (days) and finds the start of the next full day: July 16, 2009 (at 00:00 hours). It then gets the initial number (365) and calculates the first retraining period to end 365 days from July 16.
3. Imagine that the user sees the assignment and completes it again on November 15, 2009. To calculate the second retraining period, SAP SuccessFactors Learning looks at the retraining period time unit (days) and finds the start of the next full day: November 16, 2009 (at 00:00 hours). It then gets the initial number (365) and calculates the second retraining period to end 365 days from November 16.
4. Imagine that this user has learned from experience and realizes that there's no need to complete the assignment until late in the retraining period. The user completes the assignment item on November 10, 2010. Based on the settings, the system creates a new period starting the next day and sets the required date for the item on November 11, 2011.

10.2.2.7 Walk Through of Calendar-Based Period Assignment in SAP SuccessFactors Learning Curricula

Calendar-based period assignments include many abstract concepts, so using a concrete example can help you understand how those concepts apply to your business.

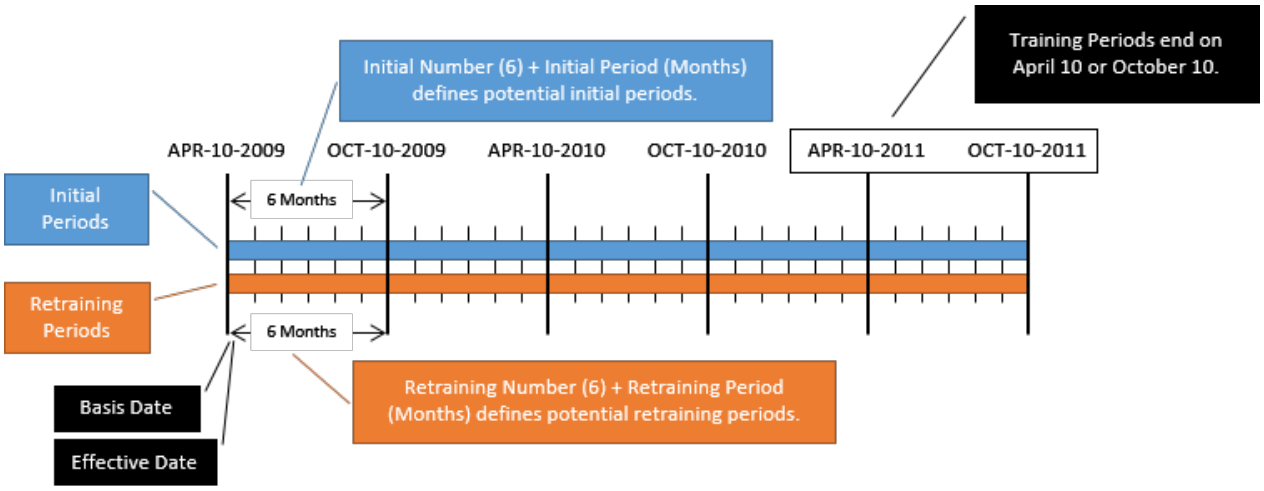
Calendar-based training events set required dates based on a set point in the calendar regardless of when users complete their training (regardless of their completion *event*). For example, calendar-based training allows you to

say that retraining should occur every six months, regardless of whether a user completes the training within the six months. To understand how calendar-based retraining periods work, we'll walk you through an example. Each step of the example adds complexity to the configuration, but we'll begin the example with a simple configuration: a retraining period to reoccur every six months whether the user is in the first (initial) period or the second and later (retraining) periods.

Calendar-Based Retraining Walk-Through, First Settings

Retraining Period Parameter	Value
Initial Number	6
Initial Period	Months
Initial Basis	Calendar
Threshold	Days, but an empty value in the associated box
Retraining Number	6
Retraining Period	Months
Retraining Basis	Calendar
Basis Date	4/10/2009
Effective Date	4/09/2009

The following time line can help you visualize how SAP SuccessFactors Learning calculates the initial training period and the retraining periods in this example.



Calendar-Based Item Assignment

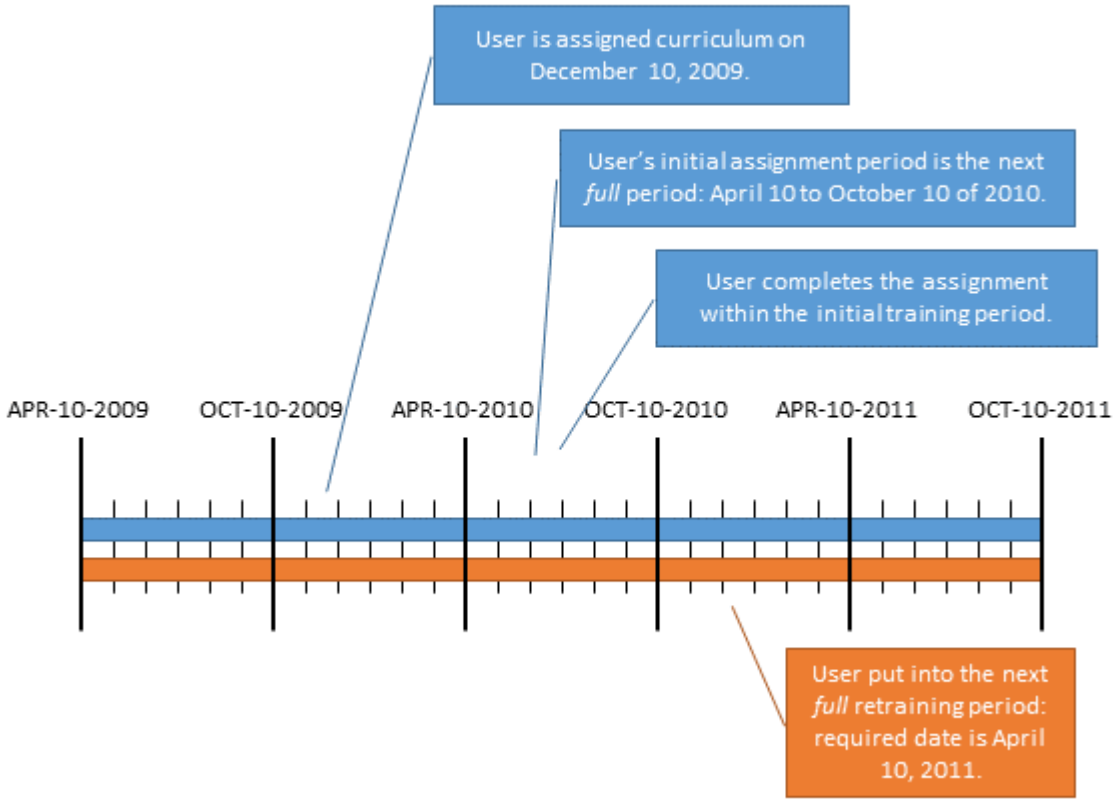
The training periods end on April 10 and October 10 of each year because:

- SAP SuccessFactors Learning starts retraining periods on the basis date, which is April 10, 2009. All calculations for periods start at that time.
- SAP SuccessFactors Learning looks at the effective date to calculate the overall status of the curriculum. In this example, it's the next day after the basis date, which means that the overall status of the curriculum is incomplete for any user assigned.

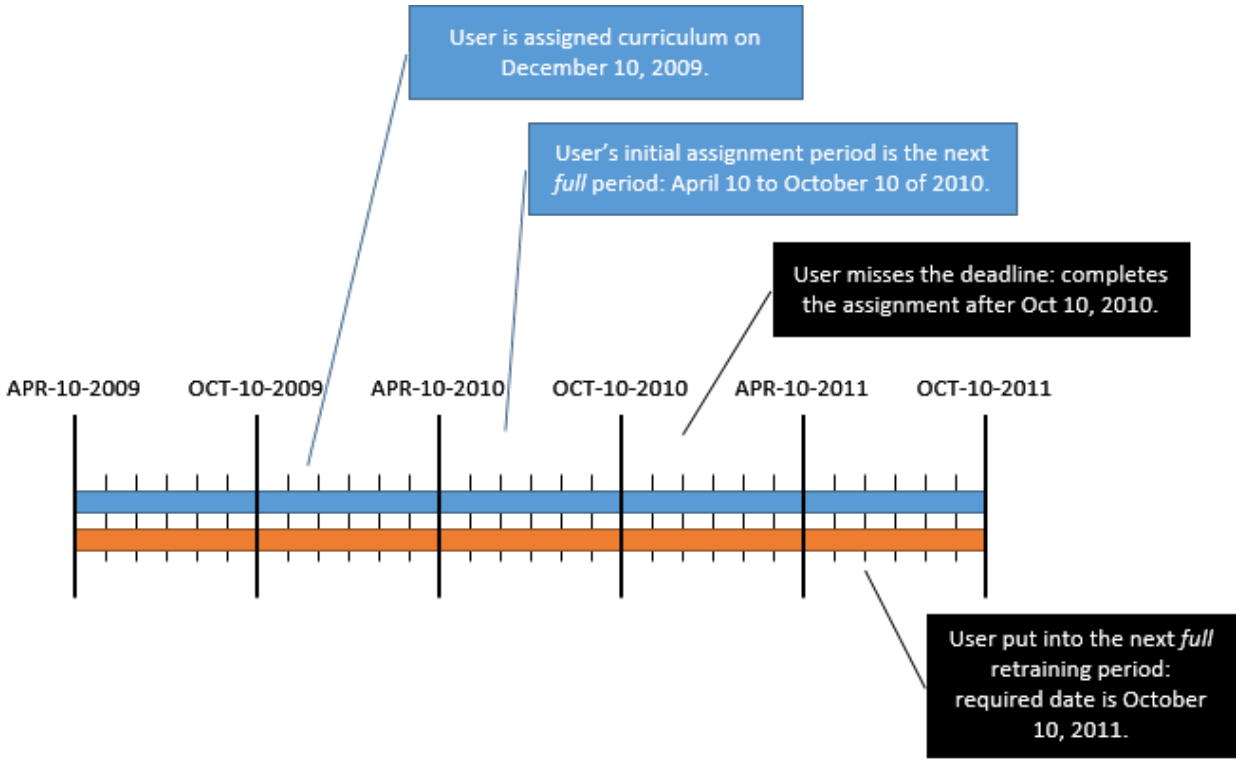
- Starting at the basis date of April 10, SAP SuccessFactors Learning starts to build initial periods. In this configuration, it:
  - Looks at the basis (calendar or event, but calendar in this case) to determine if it should calculate the periods based on the basis date or on an event. Because it's calendar, it will calculate its periods based on the basis date.
  - Looks at the initial and retraining periods to see the time unit that you want to calculate in. In this case it's months, so SAP SuccessFactors Learning uses months as its unit of time.
  - Looks at the initial and retraining numbers to see the amount of the time unit that it should calculate into the future. In this case, the number is 6 in both cases, so both the initial and retraining periods reoccur every six months starting on the basis date.

When users are assigned the curriculum, SAP SuccessFactors Learning places them in an initial and training period. Imagine that in this scenario, a user is assigned the curriculum on December 10, 2009. For this user, SAP SuccessFactors Learning:

- Places the user into the next **full** initial period because users must have a full period by which to complete the item. In this example, because the item was assigned (12/10/2009) in the previous period, this user would have until 10/09/2010 (the end of the initial assignment period) to complete initial assignments.
- After the user completes the assignment **during** the initial period (4/10/2010-10/09/2010), the SAP SuccessFactors Learning puts the user into retraining periods.
  - If the user completes the item during the initial period, then the system uses the next available period and sets the required date for that end of that period (or 4/09/2011 in this example).
  - If the user completes the item late, SAP SuccessFactors Learning system still gives the user a full period to complete retraining. For example, if the user completes the initial assignment **after** 10/09/2010, then the system sets the next required date for the end of the next full period (or 10/09/2011 in this example).



User's Initial Assignment and Reassignment If User Meets Deadline of Initial Assignment



User's Initial Assignment and Reassignment If the User Does NOT Meet Deadline of Initial Assignment

> **Note**
>
> Going forward in this example, we assume that the user completes all assignments during the correct period and on or before the required date for the period.

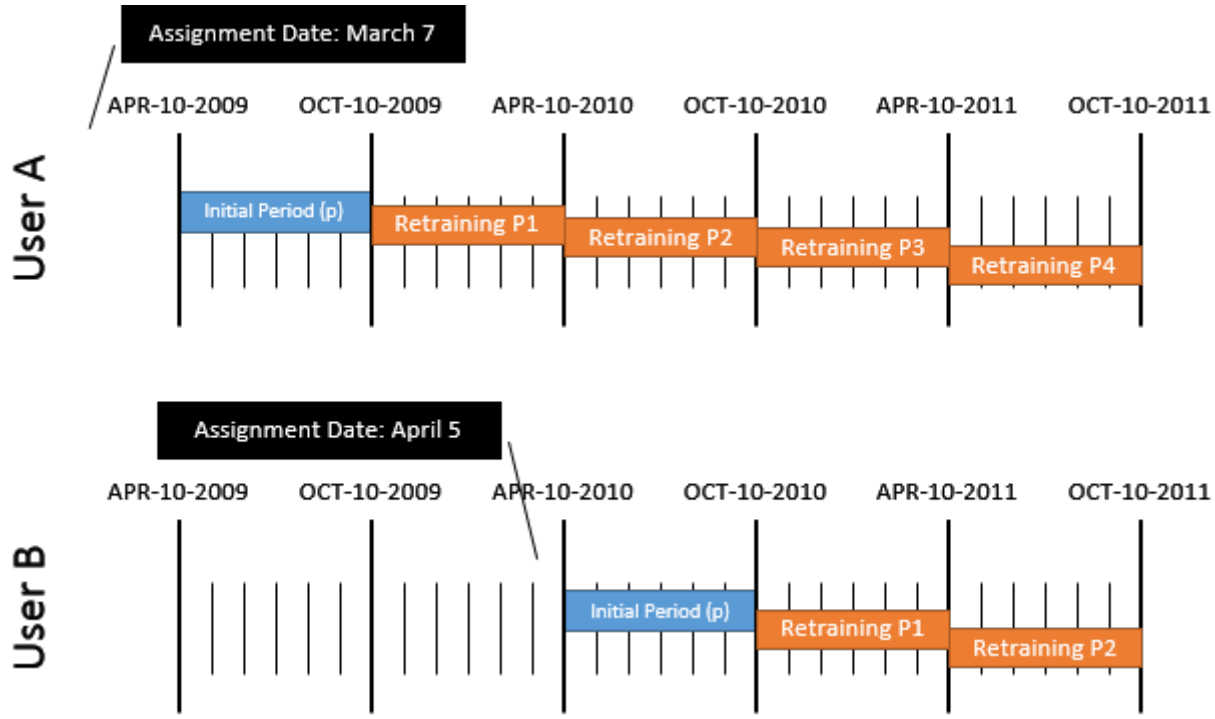
Calendar-Based Item Assignments for Two Users at Different Dates

When two different users have different assignment dates in the same calendar-based retraining periods, the system calculates the required dates by requiring that users have at least one full period to complete their assignments. To understand this, imagine two users assigned to the simple calendar-based retraining periods, but assigned at different dates.

User Assignment Dates

User	Assignment Date
User A	3/7/2009
User B	4/5/2010

The following time line can help you visualize how SAP SuccessFactors Learning calculates the initial training period and the retraining periods in this example.



Calendar-Based Item Assignments for Two Users at Different Dates

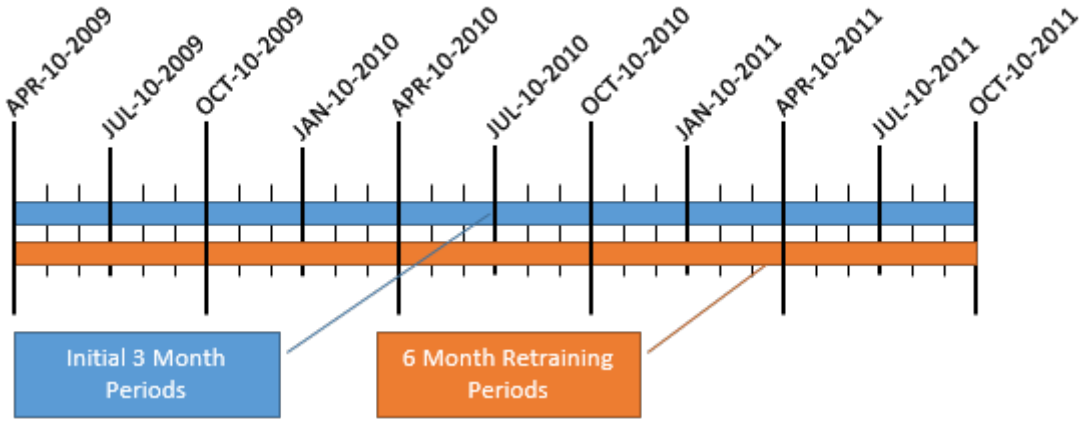
- User A receives the curriculum assignment on March 7, 2009. Although the next period end date is April 10, 2009, it wouldn't be fair to the user to require all work in three days. Instead, users get one full period to complete their assignments, the user's initial period ends on October 10 (three days and six months away). After the initial period, the user is put into a scheduled retraining period, where required dates are every six months.
- User B receives the curriculum assignment on April 5, 2010. Like User A, User B must have one full period to complete the assignments, so the required date is October 10, 2010. User B is also put into retraining periods that have required dates every six months.

Changing the Initial Number Value for a Calendar-Based Item Assignment

So far, the example is configured for equal training periods, whether the period was first (initial) or second or later (retraining). You can also create retraining that gives users a shorter or longer initial training period but keeps the retraining periods at six months.

> ⓘ Note
>
> Most customers keep their initial and retraining periods the same length of time, so this part of the example is rare. Notice that the first full retraining period **starts** about 3 months after the required date for the initial assignment. Therefore, if you want the new required date to always be a consistent amount of time from the required date of the previous completion, then you should use identical values for the initial assignment and retraining assignments.

To extend the example, let's say that you want to give users a shorter initial period. For example, you might want to give the user only three months to complete assignments in the first period (initial period). In this case, you set *Initial Number* to **3**.



Changing the Initial Number Value for a Calendar-Based Item Assignment

When you change the initial number to three (and the initial period remains months), then SAP SuccessFactors Learning creates three month initial training periods. Now the retraining periods remain in six month increments (April 10 or October 10: six months apart) but the initial training periods are three months apart (April, June, October, and January). As a reminder, the periods all start at the basis date, which in this case is April 10, 2009.

When users are assigned something from the curriculum, they have a full period to complete it. But now the full period is three month for their first attempt at completing it. For example, if users receive an assignment for the first time on July 20, 2009, their required date is January 10, the end of the first **full** three month period after the assignment.

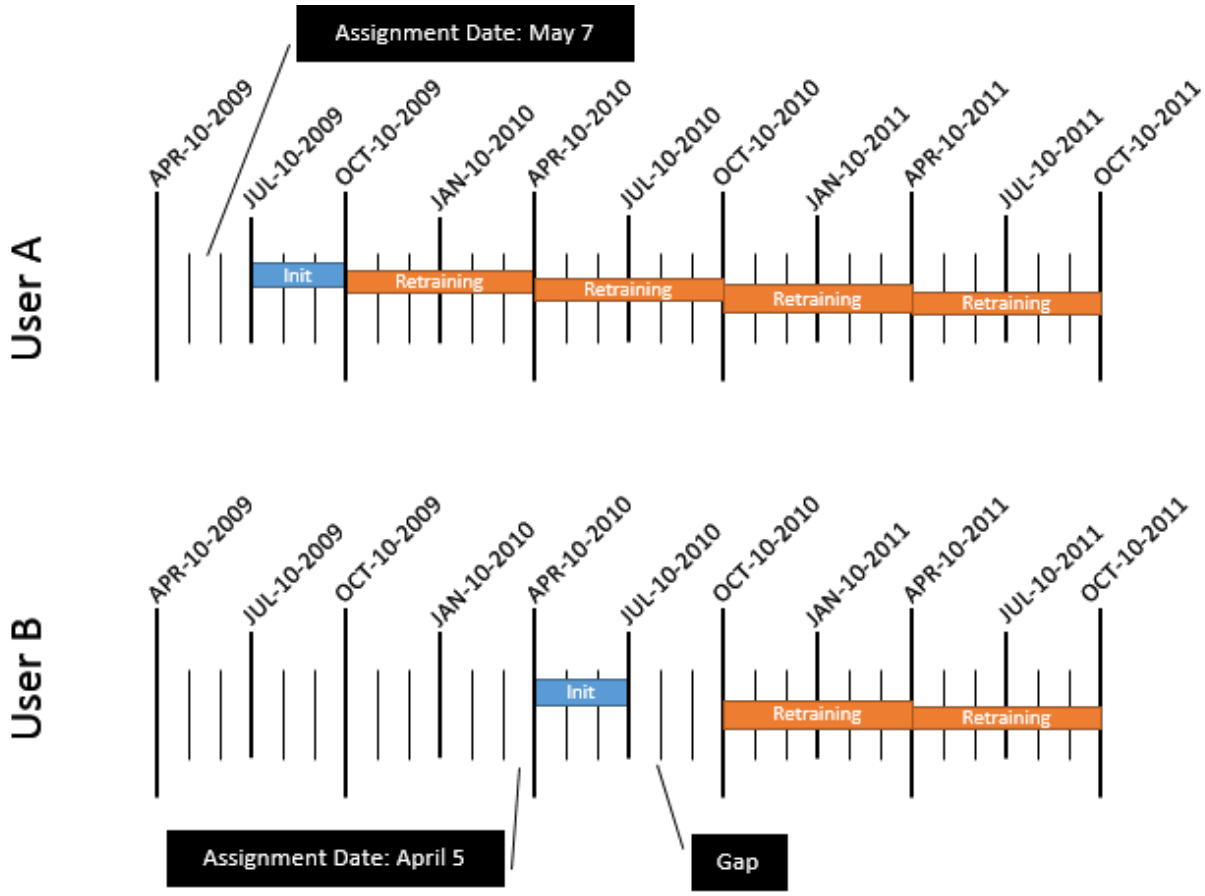
Changing the Initial Number Value for Calendar-based Item Assignment with Two Users at Different Dates

If you create a shorter initial period, then the system behaves as follows when users receive their assignments on two different dates.

Example Assignment Dates

User	Assignment Date
User A	May 7, 2009
User B	April 5, 2010

The following time line can help you visualize how SAP SuccessFactors Learning calculates the initial training period and the retraining periods in this example.



Initial Number Value Changed for Calendar-Based Item Assignment with Two Users at Different Dates

- User A receives the assignment on May 7, 2009.
  - SAP SuccessFactors Learning looks at the next full, three month initial period and finds July 10 to October 10, 2009.
  - User A's required date for the initial period is October 10, 2009.
  - At the end of the initial period, SAP SuccessFactors Learning looks for the next full six month training period and finds October 10 2009 to April 10, 2010.
  - User A's required date for the retraining period is April 10, 2010.
- User B receives the assignment on April 5, 2010.
  - SAP SuccessFactors Learning looks at the next full, three month initial period and finds April 10 to July 10, 2010.
  - User A's required date for the initial period is July 10, 2010.
  - At the end of the initial period, SAP SuccessFactors Learning looks for the next full six month training period and finds October 10 2010 to April 10, 2011.
  - User B has a gap between the end of their initial period (July 10, 2010) and the start of the first retraining period (October 10, 2010 to April 10, 2011). The gap occurs because SAP SuccessFactors Learning puts the user into the next **full**, six-month retraining period.
  - User A's required date for the retraining period is April 10, 2011.

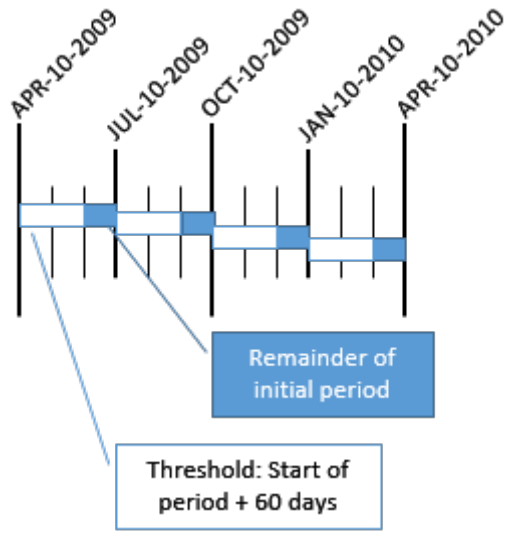
Calendar-Based Item Assignment with Threshold

Before this point in the walk-through, the example has said that users must have a full period to complete training. You can break this rule for initial periods if you change threshold. Threshold affects only the required dates for initial assignments; it doesn't affect the periods or required dates for **retraining** assignments.

If you select *Calendar* as the initial basis, then you can also set a threshold for the **initial assignment** to complete training. If you **don't** set a threshold, then users with the retraining assignment always have a full period to complete their training. If you do set a threshold, then SAP SuccessFactors Learning looks at fractions of a period.

You have these ways to set a threshold:

- If you select *Entire Period*, then the required date for the item will always be due at the end of the same period that it was assigned.
- If you select *Days* and provide a value that is greater than zero, then the system creates a date range:
  - The start date of the range equals the start date of the current period.
  - The end date of the range equals the start date plus the number of days that you entered for the *Threshold*.
- If you select *Days* and leave the value empty or blank, then the system ignores the threshold setting; there's no threshold in this case and the required date for the item is at the end of the next full period.



Calendar-Based Item Assignment with Threshold

To explain the threshold, imagine a 60 day threshold. The three month initial periods split into two zones. The first zone is the threshold zone. It starts at the beginning of the period and lasts for 60 days. For example an initial period that begins on April 10, 2009 has threshold zone that lasts for 60 days to June 9. The remaining time (June 9 to July 10) works as a standard initial period. The zones affect assignments as follows:

- If the curriculum is assigned at any time before the basis date (4/10/2009 in this example), then the system sets the required date for the item at the end of the first available initial period (by 7/09/2009 in this example).
- If the curriculum is assigned during any initial period and during the date range covered by the threshold, then the system makes the required date for the item equal to the end of the current period (by 7/09/2009 in this example).
- If the curriculum is assigned during any initial period but after the date range covered by the threshold, then the system makes the required date for the item equal to the end of the next initial period (by 10/09/2009 in this example).

In the following image, we laid the threshold periods (cross hatch) over each initial period.

10.2.3 Adding Document Links to Curricula

Add document links to curricula if you have a document that matters to the curricula: for example, a document that describes the qualifications of a curriculum.

Prerequisites

To add a document link to a curriculum, the document link must already exist in *Content* > *Document Links*.

Context

Some companies track documents associated with learning activities. In the case of curricula, it can be a statement of the qualifications issued by an auditing body. For example, the document could describe the required learning to be considered certified. If you track these documents, you likely want to keep them attached to the curricula. Importantly, the documents attached to curricula appear to learning administrators and in reports, but **not** to users.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum you want to change.
3. Click *Document Links*.
4. Click + (*Add Document Links*) and then choose the document links that you want to associate with the curriculum.

Next Steps

If you see *Yes* in the *Review* column, then the document needs to be reviewed. We recommend that you notify the appropriate people directly, because SAP SuccessFactors Learning doesn't send notifications when a document needs review. You probably want to tell the owner of the document and someone knowledgeable with the qualifications.

Task overview: Adding Curricula [page 278]

Previous task: Adding Content to Curricula [page 281]

Next task: Adding Curricula to Libraries from the Curricula Workspace [page 314]

10.2.4 Adding Curricula to Libraries from the Curricula Workspace

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

Prerequisites

To add curricula to libraries, the library must first exist. In most cases, you set up libraries before curricula, so the library probably exists. If you need to manage or add libraries, go to *Learning Activities* > *Libraries*.

Context

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

> **Note**
>
> You can also add curricula to libraries from the libraries workspace: *Learning Activities* > *Libraries*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum you want to change.
3. Click *Libraries*.
4. Click + (*Add Libraries*) and then choose the library that the curriculum has to go into.

Task overview: Adding Curricula [page 278]

Previous task: Adding Document Links to Curricula [page 313]

Next task: Creating Curriculum Overview Pages [page 316]

10.2.4.1 Adding Categories to Curricula

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

Prerequisites

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

Context

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

Procedure

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

Related Information

Creating Course Categories (Subject Areas) [page 589]

10.2.5 Creating Curriculum Overview Pages

Create curriculum overview pages to add to the information users get when they click a curriculum title.

Context

By default, when users choose a curriculum title, they see the curriculum details, which include the thumbnail, the description, and some actions that depend on the details of the curriculum. Often, this is enough for users to orient themselves to the curriculum.

In some cases, however, you can provide additional overview if the description isn't enough. For example, you want to orient the user to how the curriculum fits into a broader effort by your company. When you add overview pages, users see an *Overview* tab on the user environment. When users choose the curriculum title, they first see the *Overview* tab and then they can choose *Details* to see the details.

> **Note**
>
> Custom cover pages are available when you use the recommended user interface display in *System Administration* > *Application Administration* > *User Settings*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Curricula*.
2. Find and edit the curriculum that needs a new cover page.
3. In *Actions*, choose *Cover Page*.
4. Select a layout for the cover page in *Layout*.
5. To enable custom content in the sidebar of a layout, choose *Add Custom Content* in *Sidebar Content*.

   > **Note**
   >
   > *Add Custom Content* appears only if you choose your layout as *Right Sidebar* or *Left Sidebar*.

6. To add custom information in the main pane or the sidebar pane, choose (*Gear Icon, Edit Settings*).
7. Choose *Activate* to make your changes available.
8. If you want to activate the cover page later but keep your changes, then choose *Save and Close*.

Supported HTML Tags	Supported Attributes	Supported Styles
object, param, iframe, button, embed, a, img, p, b, u, i, table, tr, th, td, tbody, thead, tfoot, div, span, ul, ol, li, em, strong, font, h1, h2, h3, h4, h5, h6, o, br, style, blockquote, map, area, hr, video, source, details, summary, col, colgroup	open, background, name, alt, src, href, onclick, target, class, classid, codebase, version, frameborder, scrolling, allowfullscreen, quality, pluginspage, value, align, border, cellspacing, cellpadding, valign, color, size, style, type, face, colspan, rowspan, tabindex, coords, usemap, shape, bgcolor, width, height, id, sizes, summary, title, start, scope, headers, dir, bordercolor, bordercolorlight, bordercolordark, nowrap, controls	left, top, position, text-align, text-indent, text-justify, text-transform, overflow, border-radius, clear, color, margin, margin-left, margin-right, margin-top, margin-bottom, line-height, list-style-type, background-color, float, font, font-weight, font-size, font-style, font-family, background, background-image, border, border-right, border-left, border-bottom, border-top, border-width, border-style, padding, padding-right, padding-left, padding-bottom, padding-top, list-style, height, width, display, white-space, word-wrap, vertical-align, border-color, text-decoration

Task overview: Adding Curricula [page 278]

Previous task: Adding Curricula to Libraries from the Curricula Workspace [page 314]

10.3 Creating a Substitute Course Relationship

Create a substitute course relationship when you want to allow users to take a substitute course and apply that credit to a required course.

Prerequisites

Users must have access to both the required course and the substitute course through their library for the relationship to work.

Context

Substitute relationships are most useful to users who have a required learning item and want to take a substitute course to get credit for it. The substitute relationship, however, applies even if the original learning item in the relationship isn't required.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Search for and open the learning item that has a substitute.

   Search for the learning item that users are most likely assigned: the learning items that they're required to complete. You want to add a substitute to that required learning item.
3. Go to *Substitutes*.
4. Choose *Add* ( ).
5. Search for the courses that users can take as a substitute for this course (learning item).
6. To add a search result as a substitute, select *Add*.
7. For each substitute you add, create a map between the credit of your learning item and its substitute.
8. To apply the substitute retroactively, enter a date in *Effective Date*.
   - If you provide a date in the *Effective Date* box, and if the user completes the substitute item before that date, then the system ignores any substitute completions for a user.
   - If you don't provide a value in the *Effective Date* box, then the system accepts any completion of the substitute item.
9. Choose *Add*.

Related Information

Adding Learning Items to a Library [page 355]
Viewing a Library's Assignment Profiles [page 375]
Substitute Relationship Mapping Fields [page 321]

10.3.1 Curriculum Force Substitute Incomplete Example

If you use *Not-for-Credit Status* on a substitute, SAP SuccessFactors Learning uses these rules in a curriculum.

To understand how force substitute incomplete works, imagine that you have two courses: CCB-100 and CCB-200.

- CCB-100 is the primary learning item.
- CCB-200 is a substitute for CCB-100: if users can't enroll into CCB-100, they can fulfill their credit requirements by enrolling into and completing CCB-200.

You would set this up by going to *Learning Activities* > *Items*, finding CCB-100 and adding CCB-200 in *Substitutes*.

Now imagine that you also want this rule: If a user passes CCB-100 and later **fails** CCB-200, you want the user to lose their **for credit** status. After all, if CCB-200 is truly a substitute of CCB-100, then failing either shows that the user hasn't mastered the material. Users lose their **for credit** status in this scenario when:

- *Not-for-Credit Status* is populated for CCB-200 in *Learning Activities* > *Items* > *Substitutes* of CCB-100.

- The completion date of the user is on or after the *Effective Date* for CCB-200, as set in *Learning Activities* > *Items* > *Substitutes* of CCB-100.
- CCB-100 is assigned to the user.

If all of the above are true, then the user receives the status defined in the CCB-100 entity in *Learning Activities* > *Items* > *Substitutes* > *Not-for-Credit Status* for CCB-200.

10.3.2 Forcing Substitutes to Act as Primary Learning Items in Curricula

When a learning item has substitutes and when it's part of a curriculum, you want the substitute to assign credit in the same way as the primary learning item.

Context

Substitutes can add a not-for-credit history record for the learning item when users fail the substitute. The result is that the substitute carries the same weight of failure as does the primary learning item. The curriculum finds the most recent history record for the learning item, regardless of whether it's the primary learning item or the substitute. If that history record is failed, then the users are incomplete for that part of their curricula.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning items that you want to change.
3. Go to *Substitutes*.
4. Add a substitute to the learning item if they aren't added already.
5. For each substitute that you want to behave like the primary learning item set *Not-for-Credit Status* to a failure state.

   The failure state should be, but doesn't have to be, the same as the primary learning item. Your goal is to define what happens when a user passes the primary learning item and later fails the substitute. In most cases, you want the user to become incomplete in their curricula because they haven't demonstrated mastery of the material.
6. Set an effective date for the change in *Effective Date*.

   This is the date that the substitute is effective (when it can be considered a substitute for the primary learning item). When users' completion date for the substitute is on or after the effective date, and the user meets the other rules to apply not for credit status, then the rules for *Not-for-Credit Status* apply.

10.3.3 SAP SuccessFactors Learning Course Substitution

In SAP SuccessFactors Learning, you can allow users to take a substitute learning item to receive credit for a required learning item.

You often want to create substitute courses to give your users more flexibility to meet their learning requirements. You define that relationship in the required course by adding substitutes to the required learning item.

Customers typically plan their Learning Calendar for the upcoming year during the autumn. We recommend that you set up your substitute relationships during this time.

> **Note**
>
> Substitute relationships affect courses after you create the relationship. Substitute relationships don't award credits retroactively.

When you allow users to attend a substitute course for a required course, you create a substitute relationship between the two courses.

For example, you might require users to complete a CPR certification. You can allow users to complete a lifeguard certification as a substitution to the original course because it includes CPR as a component.

To define this relationship, go to *Learning Activities* > *Items*, open the CPR course, and add the lifeguard course in *Substitutes*. After you set the substitution relationship between the CPR course and the lifeguard course, users who complete their lifeguard certification will receive credit for meeting the CPR requirement.

10.3.4 Substitute Relationship Mapping Fields

These fields create the map between the credit users earn on a substitution course and the credit you want them to earn on the original, required course.

Substitute Relationship Mapping Fields

This Field...	Is Used As Follows
For-Credit Status	When you or other administrators add a history record for the substitute, and the substitute's completion status **awards** credit, the system needs to know which completion status the user should receive for the original, required learning item. You select it in this field. For example, if Workplace Safety is a substitute for A Safe Working Environment, those two courses can have a different set of completion statuses. Workplace Safety - the substitute - could have the status of Complete (for credit) and Incomplete (no credit). A Safe Working Environment could have the status of Pass (for credit) Complete (for credit), Incomplete (no credit) and Fail (no credit). The system wants to know, when you post learning for Workplace Safety (the substitute), and the users' completion status is for credit (in this example "Complete"), what status should the user have in A Safe Working Environment (the original)? Should it be Pass (for credit) or Complete (for credit)? *For-Credit Status* is affected by *Force Incomplete*.
Provide Credit for Base Item If Not Assigned	Select this if you want to say that any time a user is unable to get credit for a learning item, they lose the credit they already gained for the original learning item - whether that original learning item is currently assigned to them or not. When you clear this, you're saying that the for credit status is applied only when users are currently assigned the original, required learning item.
Not-for-Credit Status	When you or other administrators add a history record for the substitute, and the substitute's completion status **denies** users credit, the system needs to know which completion status the user should receive for the original, required learning item. You select it in this field. For example, if Workplace Safety is a substitute for A Safe Working Environment, those two courses can have a different set of completion statuses. Workplace Safety - the substitute could have the status of Complete (for credit) and Incomplete (no credit). A Safe Working Environment could have the status of Pass (for credit) Complete (for credit), Incomplete (no credit) and Fail (no credit). The system wants to know, when you post learning for Workplace Safety (the substitute), and the users' completion status **isn't** for credit (in this example "Incomplete"), what status should the user have in A Safe Working Environment (the original)? Should it be Incomplete (no credit) or Fail (no credit)? *Not-for-Credit Status* **isn't** affected by *Force Incomplete*.

10.3.5 Learning Substitute Assignment

Learning substitutes have an assignment requirement for recording credit.

To record credit for a substitute learning item and for users to get credit for original learning item, **both** the original and the substitute must be assigned to the users. For example, if ITM-2 is a substitute for ITM-1, and you want the user to get credit for ITM-1 when you record credit for ITM-2, you set up a substitute relationship in the *Substitutes*area of the ITM-1. Then, when you record learning for ITM-2, users who are assigned **both** ITM-1 and ITM-2 receive the credit status for ITM-1.

10.3.6 Viewing the Substitutes for a Learning Item

View the substitutes for a learning item to the courses users can complete to receive (or lose) credit for this learning item.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then and go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to investigate.

   Open the learning item that has the substitute relationships. For example, if you want to see which courses users can take to substitute for a Cardiopulmonary Resuscitation (CPR) course, open the CPR course.
3. Click *Substitutes*.

10.4 Removing a Substitute Course Relationship

Remove a substitute course relationship when you previously allowed a course to substitute for a required course but you no longer want it to substitute for the required course.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Search for and open the learning item that you want to edit to remove the substitute relationship.
3. Go to *Substitutes*.
4. In the list of substitutes, find the substitute that you want to remove and then its *Remove* box.
5. Click *Save*.

   You see a warning to choose the results of the removal.

6. Decide if you want the removal to affect past completions.
    - *Yes* removes substitute credit for **past** completions when it removes it from future completions. Users who received credit through the substitute in the past lose the credit.
    - *No* removes the opportunity for future substitute credit but doesn't change past substitute credit. Users who received credit in the past through the substitute keep the credit.

10.5 Curriculum Assignment and Management

Most of the time, learning administrators troubleshoot, manage, and assign curricula after they are created.

The bulk of a learning administrators time with curricula is spent maintaining the curricula. Typical assignment and management tasks include:

- Diagnosing how users are assigned to curricula (which strategy assigned users to the curriculum).
- Removing unwanted assignments
- Adjusting the contents of a curriculum either through revisions of learning items or removal of assignments.

10.5.1 Assigning Curricula Directly to Users

Launch Manage Assignments from the curriculum entity to assure that you're assigning the correct curriculum to users.

Context

You can assign curricula to users in many ways. When you want to assign specific curricula to individual users, the most convenient way is through Manage Assignments. When you want to assign **one** curriculum to many users, we recommend that you open the curriculum, verify that it's the correct curriculum, and then click *Assign*. When you do it this way, you avoid searching for the curriculum at the beginning of the wizard and you can be sure that you're assigning the right curriculum because you've looked at it before making the assignment.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum that you want to assign.
3. In *Actions*, click *Assign*.

Results

When you click *Assign*, you launch Manage Assignments with the curriculum already selected in the first steps.

Assigning Users to Learning Needs in Bulk [page 324]
: Use the Manage Assignments feature when you want to assign or unassign many learning events to many users and you want the system to guide you through the process.

Using Assignment Import to Bulk Assign Curricula to Users [page 325]
: Use assignment import to bulk assign curricula to users when you have many curricula that you want to assign to many users at one time and you want to assign them directly (as opposed to using an assignment profile).

Related Information

Assigning Users to Learning Needs in Bulk [page 324]

10.5.1.1 Assigning Users to Learning Needs in Bulk

Use the Manage Assignments feature when you want to assign or unassign many learning events to many users and you want the system to guide you through the process.

Context

You can assign learning needs to users in many ways. When you want to assign or remove the assignment of a specific need to individual users, the most convenient way is Manage Assignments.

> ⓘ Note
>
> If you make assignments through Manage Assignments, SAP SuccessFactors understands the assignments as if you assigned each one individually on the user entity. Any rules that apply to manual assignments, therefore, apply to Manage Assignments.

The phrase Learning Needs encompasses not only course entities (learning items, classes, curricula, and so on) but also associated assignments like surveys, and so on.

Procedure

1. Go to Learning Administration, and then go to *Manage Users Learning* > *Manage Assignments*.
2. In *Step 1*, select the assignment action you want to take and then click *Next*.

For example, *Add Curricula* adds curricula to many users' assignments and *Remove Surveys* removes surveys from many users' assignments.

3. In *Step 2*, click *add one or more from list* to search for users whose learning needs require the change.
4. Search for users with their common attribute and then click *Search*.

   For example, you might want to search a set of users based on a job location. Select *Add Items* and specify the location in *Job Location*. SAP SuccessFactors returns all users in that location.
5. In the search results, click *Select all the Users of the search results*.

   Alternatively, you can select individual users and then click *Add*. By selecting individual users, you can fine-tune the set of users.
6. In *Step 3*, repeat the set-building process you followed for users: use *add one or more from list* to build the set of learning needs that you want to add or remove from the set of users. Then, click *Next*.

   After *Step 3*, the options change depending on what you are assigning and whether you're adding or removing the assignment, but the later steps concern the details of the assignment. For example, you might be required to add an assignment date for curricula so that the system can calculate retraining. This assignment date might be in the future because you want the reassignment logic to calculate based on a future date.
7. In *Step 4*, set any parameters you need for the addition or removal of the assignment.
8. Follow the wizard to the end and schedule the assignment job to run.

   In rare cases, the assignment can take place immediately. But because Manage Assignments is built for bulk updates, you usually must schedule a job to run in the background.

Task overview: Assigning Curricula Directly to Users [page 323]

Related Information

Using Assignment Import to Bulk Assign Curricula to Users [page 325]

10.5.1.2 Using Assignment Import to Bulk Assign Curricula to Users

Use assignment import to bulk assign curricula to users when you have many curricula that you want to assign to many users at one time and you want to assign them directly (as opposed to using an assignment profile).

Context

We recommend that you use assignment profiles to assign curricula to users so that the assignment changes as users' attributes change. When you assign curricula directly, you must then remove the direct assignment if the curriculum no longer applies.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *System Management Tools* > *Import Data*.
2. In *Action*, select *Download Template*, and in *Record Type*, select *Curricula Assignment*.
3. Click *Submit*.

   The template downloads in your browser. Open the template in Microsoft Excel.
4. Use the comments in the heading of the columns to complete the spreadsheet.

   Each row in the spreadsheet is one assignment: one match between a user and a curriculum **plus** an action. The tool can add, update, or remove an assignment.
5. After you've completed the spreadsheet, save it, go back to *System Administration* > *System Management Tools* > *Import Data*, and then make these selections.

Field	Choice Description
Action	Select *Import Data*.
Record Type	Select *Curricula Assignment*.
Import Option	Select *Add* to add data (add assignments, in this case), *Update* to update data (don't add assignments in this case but update existing assignments), or *Add and Update* to do both. In most cases, select *Add and Update*.
Import File	Click *Choose File* to browse to and select your Microsoft Excel file.
Time Zone ID	Select the time zone that should be used for the assignment date and time. The assignment time is the moment that SAP SuccessFactors Learning processes the row. The time is recorded in this time zone.

6. Click *Submit*.

Task overview: Assigning Curricula Directly to Users [page 323]

Related Information

Assigning Users to Learning Needs in Bulk [page 324]
Assigning Curricula to Learners [page 391]

10.5.2 Assigning Curricula to Learners

Assign curricula to learners with assignment profiles so that when users' attributes change, they're automatically assigned or unassigned the curriculum.

Prerequisites

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

- Create curricula in *Learning Activities* > *Curricula*.
- Create assignment profiles in *Manage User Learning* > *Assignment Profiles*.

Context

When you assign a curriculum through assignment profiles, users are assigned and unassigned from the curriculum based on their attributes. For example, if all users in the Information Technology (IT) organization must remain qualified on IT Security with a curriculum, you can create an assignment profile that looks for all users in the IT organization and assigns them the curriculum. When users are added to the IT organization, they get the curriculum assignment. When users are removed from the IT organization, they lose the curriculum assignment.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Create an assignment profile and the rules that define who should get the assignment.
3. In *Curricula*, add the curriculum.

Next Steps

After you add curricula to an assignment profile, you execute changes for the assignment profile to complete the association of curricula to the learners in the pool. After you execute changes, learners see the libraries as part of their *Find Learning* tile.

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

10.5.3 Communicating with Learners in a Curriculum

If you need to send a message to all users who are assigned to a curriculum, you can send that message as an email from SAP SuccessFactors.

Prerequisites

SAP SuccessFactors sends your communication as an email, which means that the users in the curriculum must have an email address and your implementation must be connected to an email server.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum that is assigned to the users who you want to communicate to.
3. In *Actions*, choose *Send Email Notification*.

Results

When you click *Send Email Notification*, you launch the *Send Email Notification* wizard with the recipient population prepopulated to all users of this curriculum.

10.5.4 Assigning Curricula Through Learning Job Codes

You can attach curricula to Learning job codes to assign curricula to users in the job code **without** assignment profiles.

Context

Most companies **don't** assign curricula through job codes. Instead, most configure assignment profiles to look for users in this job code and then assign the curriculum to them. The advantage of using assignment profiles is that they automatically and remove assignments: when users enter and leave the job code, SAP SuccessFactors Learning automatically adjusts their assignments.

Procedure

1. Go to SAP SuccessFactors Learning administration, and then go to *References* > *People Management* > *Job Codes* .
2. Open the job code you want to modify.
3. Go to *Curricula*.
4. Click *add one or more from list* and search for the curricula that you want to add.
5. If you want to add a curriculum to users who are currently associated with the job position, select *Add curricula to users who are assigned this job code*.

   To create a reporting relationship only, clear *Add curricula to users who are assigned this job code*. Use assignment profiles to manage the assignment and use job codes' curricula to create reporting relationships.
6. Click *Add*.

10.5.4.1 The Purpose of Job Codes in Learning

You assign job codes to learning profiles to make learning assignment easier.

Create a job codes when the job code matters for learning assignments. For example, if you want to assign different types of courses to accounts receivable clerks, cashiers, and quality control engineers, then create those job codes. After you create the job codes, and add the job codes to learner profiles, you can push a training course to all accounts receivable clerks.

- You can design an assignment profile rule to look at learner profiles and find all learners who are in the accounts receivable clerk job code. It pools all accounts receivable clerks (by job code) and assign them the course.
- You can add curricula in the accounts receivable clerk job code *Curricula*. All learners who have accounts receivable clerk as their job code in the learner profile are assigned to the curriculum (for example, an ethics curriculum)

> **Note**
>
> A job **position** is a single instance of a job code, occupied by one user. For example, if you have ten accounts receivable clerks in your company all sharing the same title and doing roughly the same job, you have one job code and ten **positions** for that job code. Job positions remain in Learning because they were a part of Plateau before it SAP SuccessFactors purchased it. Some existing customers still have job positions, but new customers can ignore them.

10.5.4.2 Copying a Job Code

View this section if you want to know how to copy a job code.

Context

In the *References* > *Poeple Management* > *Job Codes* > *Search* > *Search Results* > *Summary* > *Copy Job Code...* , you can replicate an existing job code with the same content. Thereplicated job code requires a new Job Code ID.

Procedure

1. Choose the *Copy Job Code...* button in the *Summary* tab. .
2. In the *Copy Job Code* page, enter a *New Job Code ID* for the copied job code.
3. Enable any of the following check boxes if they pertain to your new job code:
   - *Copy curricula data*
   - *Copy competency data*
   - *Copy task data*
   - *Copy job profile data*
   - *Update Users from old job code to the new one*
4. Choose the *Reset* button to clear the *New Job Code ID* field and check boxes.
5. Choose the *Copy* button to take you to the *Edit the Job Code* page to provide required and relevant information.

   Refer to the Learning Items Summary Fields related link for field descriptions.
6. Enable any of the following check boxes if they pertain to your new job code:
   - *Automatically assign the curricula when the user is assigned this job code*
   - *Automatically remove the curricula when the user's job code changes*
   - *Automatically assign the competency profiles when the user is assigned this job code*
   - *Automatically remove the competency profile when the user's job code changes*
7. Choose the *Apply Changes* button to add the new job code, or choose the *Reset* button to clear all fields if you need to start over.
8. If you want to make another copy of the job code, then choose the *Copy Job Code* button.
9. If you need to delete the job code, then choose the *Delete* button.

   A prompt asks, "Are you sure you want to delete this job code?" Choose the *OK* button to confirm the deletion or choose the *Cancel* button if you don't want to delete the job code.

Related Information

Learning Item Details Fields [page 148]

10.5.4.3 Adding Competency Profiles to SAP SuccessFactors Learning Job Codes

Associate competency profiles with job codes to express the kinds of skills and knowledge that the job code requires.

Procedure

1. Go to SAP SuccessFactors Learning Administration, go to *Users* > *Job Codes*, and then find the job code you want to modify.
2. Go to *Cpty Profiles*.
3. Click *add one or more from list* and then search for the competency profiles that you want to add.
4. If you want to add a competency profile to users who are currently associated with the job code, select *Add competency profile(s) to users who are assigned this job code*.

   The *Add competency profile(s) to users who are assigned this job code* appears in the *Results* tab after you click *add one or more from list*.

   If you do **not** select *Add competency profile(s) to users who are assigned this job code* before you add the competency profile, then users who move into this job code have more job-related competency profiles assigned to them than the users who are currently associated with the job code.
5. Click *Add*.

10.5.4.4 Adding Competency Profiles to Learning Job Codes

Add competency profiles to Learning job codes to express the kinds of skills and knowledge that the job code requires so that you can understand the job codes better.

Context

Competency profiles are a set of skills or knowledge that a user should have or know. Learning has competency profiles because they're left over from Plateau Learning Management System, before it was purchased by SAP SuccessFactors. Some customers are grandfathered into competency profiles and can still use competency profiles as a descriptor of the **Learning** job code.

Procedure

1. Go to Learning Administration and then go to *References* > *People Management* > *Job Codes*.

2. Find and open the job code that you want to edit.
3. Go to *Cpty Profiles*.
4. Click *add one or more from list*.

10.5.4.5 Removing Competency Profiles from SAP SuccessFactors Learning Job Codes

Remove competency profiles from a job code to assign the coursework to users in the job code.

Procedure

1. Go to SAP SuccessFactors Learning Administration, go to *References* > *People Management* > *Job Codes*, and then find the job code you want to modify.
2. Go to *Cpty Profiles*.
3. Select *Remove* for the competency profile that you want to remove.
4. If you want to remove a competency profile from users who are currently in the job code, then select *Remove competency profile(s) from users who are assigned this job code*.

   If you don't select *Remove competency profile(s) from users who are assigned this job code* before removing the competency profile, then users who are currently associated with the job code have more job-related competency profiles assigned to them than the users who move into this job code.
5. Choose *Apply Changes*.

10.5.4.6 Adding Custom Fields to Learning Job Codes

Add custom fields to job codes to make them easier to find when you search for them.

Prerequisites

Add the set of custom fields that you want to use for job codes in *System Administration* > *Custom Fields*.

Procedure

1. Go to Learning Administration and then go to *References* > *People Management* > *Job Codes*
2. Find and open the job code that you want to add custom data to.

3. Go to *Custom Fields*.
4. Change the values and then click *Apply Changes*.

Example

For example, your job codes might have a distinction between hourly and salaried. You can add "hourly or salaried" as a custom field, populate the values, then search for all hourly job codes and all salaried job codes.

Next Steps

After you add custom fields, you can search for job codes by the values of the custom fields.

10.5.4.7 Learning Job Codes Summary

View this section if you want to manage curricula and competency profiles for a job position.

Job Code Fields

This Field...	...Is used as Follows
Description	The description of a job position appears throughout SAP SuccessFactors Learning including the user interface and reports.
Details	Use the details to describe the job position, including what is required for users of this job position.
Job Location	In SAP SuccessFactors Learning, job locations are a simple list of places where users work. Job locations are almost always mapped to your Human Resources (HR) system of record. To see your list of job locations as they were imported to SAP SuccessFactors Learning, go to *References* > *Geography* > *Job Locations*.

This Field...	...Is used as Follows
Job Grade	**Note** Job grades are a part of Plateau legacy compensation and performance products, which are in their retirement process. Job grades are important to both positions and job codes because many organizations have a simple job grade structure but a complicated job code structure. Often managers know when employees are ready to move to the next job grade but they don't know which job code to put them into. By associating job grades with job codes, a Human Resources manager can search for all job codes in a job grade and help the manager find the job code that fits. For example, a manager might know that an employee is ready to move to a manager level job grade but might not know exactly which job code matches. A Human Resources professional can search all job codes matching the job grade "manager" to find the job code that fits what the manager has in mind for the user. If you don't see a job grade that you want to use, then you can create a new one in the Job Grades section (*References* > *People Management* > *Job Grades*).
Salary Range Minimum, Maximum, and Currency	**Note** Salary fields are a part of the Plateau legacy compensation product, which is in its end of life process. This is the salary information for this job code. Currency is managed in *References* > *Finance* > *Currencies*.
Job Families	The group in which the job belongs.
Automatic Assignment	If you select the following check boxes and a user changes job positions, then you can verify the changes in several places. In SuccessFactors Learning Administration, the system adds or removes: • Curricula (*Learning Activities* > *Curricula*) and the items of the curricula (*Learning Activities* > *Items*). • Competency profiles. In the user interface, the system adds or removes: • Curricula and the items of the curricula. • Competencies of the competency profile • Competencies of the competency profile to a performance review, if the user is associated with a performance process that uses a performance review template that includes the competencies section.

10.5.4.8 Why Learning Job Codes Have Positions

Learning has job positions because they're left over from Plateau Learning Management System, before it was purchased by SAP SuccessFactors. Use position management to manage your job positions. Don't use Learning positions.

You can use *References* > *People Management* > *Job Codes* > *Positions* to review all of the **Learning** positions that are associated with this job code.

> **Note**
>
> A job position is a single instance of a job code, occupied by one user. For example, if you have 10 accounts receivable clerks in your company all sharing the same title and doing roughly the same job, you have one job code and 10 positions for that job code. Job positions remain in Learning because they were a part of Plateau before it SAP SuccessFactors purchased it. Some existing customers still have job positions, but new customers can ignore them.

- You can only associate a position with a job code when you add a new position record. After you save the position record, you can't modify its associated job code. Therefore, if you see a position in the table and you want to move it to another job code, you must inactivate the position and create a new one.
- To mark positions critical, you must associate them with an organization because you mark all positions in an organization as critical, not individual positions.

10.5.4.9 Why Learning Job Codes are Related to Curricula

When you add curricula to job codes, you can report on the curricula necessary for the job code and you can assign curricula to users based on their job codes.

Associate curricula with a job code to crate a reporting relationship between job codes and curricula. When SAP SuccessFactors Learning knows which curricula are required for users to be qualified for a job code, you can report on that information later.

You can also use the relationship to create assignments, but consider assignment profiles to manage the assignments. You can just as easily create an assignment profile that assigns curricula to learners and then you can keep all your automatic assignments in one place.

10.5.4.10 Why Learning Job Codes Have Profiles

Learning has job code profiles because they are left over from Plateau Learning Management System, before it was purchased by SAP SuccessFactors.

Previously, customers used job code profiles to define what people in that job code should be able to do: skills they need, languages they speak, and so on. The profiles were an efficient way to build Plateau talent profiles.

You can still use profiles to create a picture of the job profile, but Learning uses the information as read-only. It simply helps you view what people in that job profile are expected to do so that you can better assign courses to people in the profile.

10.5.5 Copying a Curriculum

Copy a curriculum to use a current curriculum as a template for a new one.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum that you want to copy.
3. In *Actions*, click *Copy*.
4. Type a new curriculum ID in *New Curriculum ID*.
5. Select what should copy from the original to the new curriculum.

If you select...	and click Copy, then SAP SuccessFactors Learning...
Document Link info	copies document information from *Document Links* to the new curriculum.
Job code relationships	copies job code relationship information from *Job Codes* to the new curriculum.
Item relationships	copies items from *Contents* to the new curriculum.
Requirement relationships	copies requirements from *Contents* to the new curriculum.
Curriculum hierarchy relationships	copies subcurricula from *Contents* to the new curriculum.
User assignments	finds all the users who are associated with the original curriculum and adds the new curriculum to the users' *Curricula*.
Add the new curriculum to the library	automatically adds the new curriculum to one or more libraries that you select in *Libraries*.
Cover Page	copies the *Cover Page* to the new curriculum.
Nothing (none of the above)	copies only the summary information.

10.5.6 Checking the Assignment Profiles That Assign a Curriculum

If you want to know the assignment profiles that assign a curriculum to users, you can open the curriculum and check its assignment profiles.

Context

Often, you want to know which assignment profiles are automatically making assignments of curricula so that you can troubleshoot how curricula are being assigned. In this case, you know the curriculum, but you don't know which assignment profiles assign that curriculum. You can start with the curriculum and work back to its assignment profiles.

> **Note**
>
> You can add the curriculum to an assignment profile from within the curriculum, but we recommend that you add the curriculum by opening the assignment profile and adding it there. By going to the assignment profile, you can check the rules, preview the users, and use the other tools that help you make accurate assignment choices.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum you want to investigate.
3. Click *Assignment Profiles* to see the list of assignment profiles that assign the curriculum.

   In *Assignment Profiles* for *Curricula*, the search bar is enabled when entities are present and is used to filter results. Searching for *Assignment Profiles* by *Description* or *ID* returns relevant results.
4. Click any assignment profile to open the assignment profile.

10.5.7 Viewing the Job Codes in Curricula

View the job codes in curricula when you know a curriculum and you want to see which job codes get the curriculum as an assignment.

Context

When you're troubleshooting the assignment of curricula to users, you often want to see which job codes are associated with a curriculum. The job codes are important because when a user is in a job code, and that job code is attached to a curriculum, the curriculum is automatically assigned to the users. For example, users in a medical technician job code might need to qualify for medical privacy guidelines. You can attach the medical privacy guidelines to the medical technician job code so that all medical technicians are automatically assigned the job code.

If you're done troubleshooting and need to make a change to the assignment, you can make that change in the job code record: *References* > *People Management* > *Job Codes* > *Curricula*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum you want to investigate.

3. Click *Job Codes*.

10.5.8 Removing Assignments from the Contents of Curricula

Remove assignments from the contents of a curriculum when the assignment no longer applies to the curriculum.

Context

If an assignment no longer applies to the curriculum, but the curriculum still applies to the users, you can remove the assignment from the curriculum. For example, if the curriculum qualifies users in Information Technology (IT) security, and if you want to remove a single retraining item from users, then chances are that the retraining no longer applies to IT security in your organization. You can open the curriculum and remove the learning item in *Contents*.

> **Note**
>
> When you remove the learning item from the curriculum, you affect all users who are currently assigned the curriculum: they all lose the learning item assignment.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum you want to change.
3. Click *Contents*.
4. Click *Manage Content*.
5. For each assignment that you want to remove, select its *Select* box.
6. Click *Remove*.
7. Close the *Contents* popup.

10.5.9 Troubleshooting Individual User Status in Curricula

Troubleshoot user status in curricula when you want to see how an individual user is complying with training in their curricula.

Context

In almost all cases, curricula are assigned automatically by an assignment profile. For an individual user, your work is usually to handle the exception cases, check users' status, or to troubleshoot an issue. For example, you might

need to troubleshoot why a curriculum **wasn't** automatically assigned to the user. Or, you might run the Curriculum Status report and find an exception: a user who isn't current on their curricula, but should be. In these cases, you can troubleshoot the individual user's status in a curriculum:

- Check the list of curricula assigned to the user to find missing or unnecessary curricula
- Attach the curricula from the user's job code if that is part of your process but missing from the user
- Check the status by looking at the status and next action date
- Check the history of the user's relationship to the curricula with the assign date

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find the user that you want to investigate, open the user, and then click *Curricula*.

   You see the list of curricula assigned to the user so that you can check that the user is assigned all curricula that are required. If a curriculum is missing, check the curriculum's assignment profiles to see why this user is missing from the profile.
3. For each curriculum that you want to investigate, click *View Details* link.

   You see the curriculum details and how the user is performing on the individual learning items or requirements for the curriculum.
4. To drill into the curriculum and into the items in the curriculum, start by clicking the curriculum title in the list.

   The curriculum opens so that you can investigate is structure for problems.

   User Curriculum Summary Information [page 340]
   User curricula summary settings help you troubleshoot users' curricula. Use them to understand the status of the user in the curricula.

   User Curriculum Details Information [page 341]
   The user curriculum details information helps you diagnose the status of an individual user with an individual curriculum.

Related Information

Curriculum Content Settings [page 291]
User Curriculum Details Information [page 341]
User Curriculum Summary Information [page 340]
Curriculum Content Settings [page 291]

10.5.9.1 User Curriculum Summary Information

User curricula summary settings help you troubleshoot users' curricula. Use them to understand the status of the user in the curricula.

This Field...	Is Used as Follows...
Title	The title is a way to identify the particular curriculum from among all the curricula in the system. The title of the curricula is a link. Click it to open the curricula. Expand the curricula to see any subcurricula.
Status	The user's status in this curricula.
Expiration Date	The date calculated by the system after a user completes an item that is assigned for retraining. This field will display a null value if the item does not have a retraining set up or if the user has not completed the item at least once. The expiration date will be the same as the required date unless modified in the *Edit Required Dates* tool. In addition, this field cannot be modified unless retraining values are modified on the curricula, which will impact all users assigned to it.
Priority	The priority of the curriculum. When troubleshooting users' curricula, use the priority to understand the relative importance of the curricula. Users can see the priority.
Next Action Date	The next time that a user must take action. Usually, the next action date is the next date at which an item in the curriculum is required. Check the user's learning plan to see which learning item has the next due date. If the next action date isn't available, chances are that the user has completed all the items for the curricula and there's no work left to do at this time.
Assign Date	The date that the user was assigned the curriculum. You can change the assign date if you want to override the automatic assignment date. For example, the automatic assignment system might miss a user who should have been assigned a curricula on the first day of the year. If you discover the problem later, you can set the assignment date to the date that the user **should** have been assigned the curriculum (January 1).
Add User	The add user is the user who added the curriculum to the user. If the curriculum was directly assigned, then it's the user name of the administrator who assigned it. If it was automatically assigned, then the add user is the system user.

Parent topic: Troubleshooting Individual User Status in Curricula [page 338]

Related Information

User Curriculum Details Information [page 341]

10.5.9.2 User Curriculum Details Information

The user curriculum details information helps you diagnose the status of an individual user with an individual curriculum.

To see the user curriculum details information, go to *People* > *Users* > *Curricula* > ••• *(More)* > *View Details*.

View the Items for the Curriculum

This Field...	Is Used as Follows...
Assignment Date	The date that the item was assigned.
Completion Status	The current completion status for this user in this learning item in this curriculum. Completion status affects how users are complete in the curriculum. A user with a failure status **is most likely** incomplete in the curriculum. **Note** If you set *Force Incomplete* to false, it's possible for a user to fail an item on a second, voluntary attempt and maintain a passing completion status (credit given). In these cases, you see a failure date but you also see a passing completion status. When you see a failing completion status (credit not given) the failure is most likely the reason why a user is incomplete in the curriculum.

This Field...	Is Used as Follows...
Completion Date and *Failure Date*	The date that the user completed and the date that a user failed the learning item. It's possible for a user to have **both** a completion date and a failure date. Users can take the course more than once, complete it on one attempt and fail it on another. In most cases, these dates affect the retraining dates (next action dates) for the user because they're training events and most curricula are set up to retrain based on an event.
Effective Date	*Effective Date* grandfathers changes into the curriculum. If you add a new assignment to the curriculum, and if you set the effective date into the future, then SAP SuccessFactors Learning allows users' curricula to remain complete until the effective date. Before the effective date, users who have a complete curriculum remain complete even if they haven't completed this assignment. After the effective date, if users have not completed the assignment, they are incomplete for the curriculum. **Note** If an assignment's *Assignment Type* that makes the assignment required, then you must also provide an effective date so that SAP SuccessFactors Learning can calculate the status of the curriculum based on all required assignments. For example, imagine a user who has successfully completed all of the items in a curriculum and whose current status for that curriculum is **Complete**. • If you add a new item to the curriculum and set the effective date to a future date, then SAP SuccessFactors Learning sees the assignment as effective on that future date, skips the assignment when evaluating the completeness of the curriculum, and keeps the user's status **Complete**. • If you add a new item to the curriculum and set an effective date to a past date, then SAP SuccessFactors Learning sees the assignment as immediately effective, sees that the assignment is incomplete, and changes that user's status to **Incomplete**.
Required Date	Required date is the next date that the user must complete the required learning item. If the learning item requires retraining (this is common), the date is calculated from the retraining configuration in the curriculum.

This Field...	Is Used as Follows...
Retraining Assignments	The retraining assignments in the *Curriculum Details* view is a brief description of the retraining rules. For example, a common retraining assignment is 365 Days - Event, which means that the user is required to retrain every year based on their last completion. For details about the retraining configuration, go to the curriculum and look up the full retraining settings for the learning item in the curriculum.

Parent topic: Troubleshooting Individual User Status in Curricula [page 338]

Related Information

User Curriculum Summary Information [page 340]
Curriculum Content Settings [page 291]

10.5.10 Diagnosing Incorrect Curriculum Assignments

To remove an incorrect assignment, you must first diagnose how it was assigned because your strategy for removing the assignment depends on how the curriculum was assigned in the first place.

Procedure

1. Go to Learning Administration, and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum that is incorrectly assigned.
3. Choose *Assignment Profiles*.
   a. Choose each assignment profile in the list to open it and then choose *Download Existing Users* in *Actions*.
   b. Open the file and review it to find the users with the incorrect assignment.

      If you find the users, then you know that this user has been assigned the curriculum through the assignment profile. Write down the assignment profile name.
   c. Choose the back button in your browser and repeat for each assignment profile.

      It's important to repeat the process for each assignment profile because the curriculum could have been assigned to the user through more than one assignment profile. Troubleshoot each one.
4. Choose *Job Codes* and then make a list of all job codes that use the curriculum.
5. Go to *Manage User Learning* > *Manage Assignments*.

6. In *Step 1*, select *Remove Curricula* and then choose *Next*.
7. In *Step 2*, choose *add one or more from list* and then add users who have the incorrect assignment.
8. Choose *Next*.

   Look for the incorrectly assigned curriculum. If you can find it, then you know that the incorrect assignment was made directly to at least some of the users.

Next Steps

For each assignment profile that incorrectly assigned the curriculum to the user, troubleshoot the assignment profile to remove the assignment.

For each job code that you found, troubleshoot the job code assignment.

For each direct assignment, remove the direct assignment.

Check that you scheduled the Curriculum/Program Maintenance process and that it has run.

Unassigning Curricula That Were Assigned Directly [page 345]
: If you directly assigned a curriculum and users no longer need the assignment, you can remove the assignment with the Manage Assignments wizard.

Unassigning Curricula That Were Assigned BySAP SuccessFactors Learning Job Codes [page 345]
: If you use job codes to assign curricula to users (this is rare), check the job codes to unassign curricula.

Unassigning Curricula That Were Assigned by Assignment Profiles [page 346]
: If you diagnose curriculum assignments and find that incorrect assignments are made by an assignment profile, you can troubleshoot and fix them.

Related Information

Scheduling the Curriculum/Program Maintenance Process [page 1248]

Scheduling Learning Automatic Processes [page 1245]

Troubleshooting Learning Automatic Processes [page 1240]

10.5.10.1 Unassigning Curricula That Were Assigned Directly

If you directly assigned a curriculum and users no longer need the assignment, you can remove the assignment with the Manage Assignments wizard.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Manage User Learning* > *Manage Assignments*.
2. In *Step 1: Select Management Action*, select *Remove Curricula* and then click *Next*.
3. In *Step 2: Select Users*, click *add one or more from list* and then add users who have the incorrect assignment.
4. Click *Next*.
5. In *Step 3: Removing Curricula*, click *add one or more from list* and then add the curricula that are incorrectly assigned.
6. Click *Run Job Now*.

Task overview: Diagnosing Incorrect Curriculum Assignments [page 343]

Related Information

Unassigning Curricula That Were Assigned BySAP SuccessFactors Learning Job Codes [page 345]
Unassigning Curricula That Were Assigned by Assignment Profiles [page 346]

10.5.10.2 Unassigning Curricula That Were Assigned BySAP SuccessFactors Learning Job Codes

If you use job codes to assign curricula to users (this is rare), check the job codes to unassign curricula.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *References* > *People Management* > *Job Codes*.
2. Open the job code that is assigning the curriculum to the user.
3. Go to *Curricula*.
4. Click *Remove* for the curricula that you want to remove.

5. If you want to remove curricula from users who are currently in the job position, then select the *Remove curricula from users who are assigned this job code*.

   If you don't select *Remove curricula from users who are assigned this job code* before removing the curricula, then users who are currently associated with the job position will have more job-related competency profiles assigned to them than the users who move into this job position.
6. Click *Apply Changes*.

Task overview: Diagnosing Incorrect Curriculum Assignments [page 343]

Related Information

Unassigning Curricula That Were Assigned Directly [page 345]
Unassigning Curricula That Were Assigned by Assignment Profiles [page 346]

10.5.10.3 Unassigning Curricula That Were Assigned by Assignment Profiles

If you diagnose curriculum assignments and find that incorrect assignments are made by an assignment profile, you can troubleshoot and fix them.

Prerequisites

Although it isn't required, we recommend that you first remove any direct assignments to save time in this process.

Context

Assignment profiles **should** automatically unassign curricula. If the assignment profile isn't automatically removing the assignment, then chances are that something went wrong with the processes that make the automatic assignments, the configuration of the assignment profile, or the configuration of the user. To correct the assignment, you need to troubleshoot the processes, the assignment profile, and the user.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Automatic Processes* > *Assignment Profile Execute Updates*.

2. Look at *Last Execution Result* and *Last Execution* to verify that the process ran recently and that it succeeded.

   Assignment Profile Execute Updates makes the assignments based on the configuration of assignment profiles. If *Last Execution Result* is any value other than *Succeeded*, then something went wrong with this process.
3. If the process **didn't** succeed, click *View Errors* to see what went wrong, and then address the errors.
4. If the last execution time is older than you expect, look in *Schedule* to verify that *Schedule This Process* is selected and that the process is running on a reasonable schedule.
5. After you check Assignment Profile Execute Updates, go to *Manage User Learning* > *Assignment Profiles*, and then find and open the assignment profile that you want to troubleshoot.
6. Go to *Rules* and verify that the rules are correct.

   For example, you might have added or removed regions, which might change how you want the assignment profile to assign curricula based on region. You might be assigning curricula to users in a region even though the users no longer need the curriculum.
7. If the rules are correct, then open the user's entity in *People* > *Users*.
8. Look at the user's attributes to verify that they're correct for the user. If you see that some of the attributes are incorrect, fix them.

   If the assignment profile's rules look for the correct attributes, then there's a good chance that there's an attribute that should have changed in the user's entity but hasn't. For example, if the assignment profile assigns the IT security curriculum to all users in the IT organization, it could be that the user's entity indicates that the user is still in the IT organization even though the user moved out of the organization.
9. Click *Curricula* and look for the curriculum in the list.

   If you find the curriculum, then the curriculum is assigned by the assignment profile, but it's also directly assigned. Assignment profiles **don't** remove directly assigned curricula because we assume that you meant to directly assign the curriculum and don't want to automatically remove it with an assignment profile.
10. If you or someone else directly assigned the curriculum in error, select its *Remove* check box and then click *Save*.
11. Go back to *Manage User Learning* > *Assignment Profiles*, and then open the assignment profile.
12. In *Actions*, click *Update Users and Assignments*.

    This forces the Assignment Profile Execute Updates process to run with your changes.

Next Steps

After you troubleshoot, check with the user to see if the curriculum is removed from their assignments.

Task overview: Diagnosing Incorrect Curriculum Assignments [page 343]

Related Information

Unassigning Curricula That Were Assigned Directly [page 345]

Unassigning Curricula That Were Assigned BySAP SuccessFactors Learning Job Codes [page 345]

10.5.11 Curriculum Assignment Strategies

Choose the correct curriculum assignment strategy based on how you want to build the assignment.

Direct Assignment

Direct assignment connects users to curricula until you remove the assignment. For example, if you assign an Information Technology (IT) security curriculum to a user, that IT security curriculum remains with that user until you remove the assignment. Even if the user leaves the IT organization so that it no longer applies, the user keeps the assignment.

You can make direct assignments in a number of ways:

- You can open a single user's entity in SAP SuccessFactors Learning administration (*People* > *Users*) and add the curriculum in *Curricula*.
- You can use the Manage Assignments wizard to directly assign many curricula to many users: *Manage User Learning* > *Manage Assignments*.
- You can import a spreadsheet of curriculum assignments: *System Administration* > *System Management Tools* > *Import Data*.

Assignment Profiles

Assignment profiles pool users by their attributes and then assign **or unassign** curricula automatically based on changing attributes. For example, if you create an assignment profile that looks for all users in the Information Technology (IT) organization and assigns them an IT security curriculum, then when users are added to the IT organization, they're automatically assigned the IT security curriculum. The reverse is also true: if users leave the IT organization, the IT security curriculum is unassigned.

- To find if the user is associated with an assignment profile, go to the user's *Assignment Profiles* area.
- To find which of the assignment profiles have the curricula, go to *Manage User Learning* > *Assignment Profiles* > *Curricula*.

Job Codes

This is an infrequently used assignment strategy because you can also build an assignment profile that pools users by job codes. The one advantage to assigning by job code is custom reports. If you want to build a custom report that looks for curricula by job code, then you should use the job code assignment strategy. Just like assignment profiles, users' assignments are updated when they move in and out of the job code.

- To find if this user is associated with a job code, look at the user summary area.
- To find if the job code is associated with curricula, go to the user's job code entity in *References* > *People Management* > *Job Codes* > *Curricula* .

To force an attachment between the user and the job-related curricula, click *Attach Job Related Curricula*.

10.5.12 Reassignments from SAP SuccessFactors Learning Curricula Treated as Single Assignment

SAP SuccessFactors Learning treats all the reassignments made by a curriculum as a single assignment.

If you assign a learning item to users through a curriculum, and if you configure it for reassignment, then you cannot unassign that single learning item. Instead, you either unassign the curriculum from the user or you remove the learning item from the curriculum.

- If the retraining assignment no longer applies to the curriculum, but the curriculum still applies to the users, you can remove the learning item from the curriculum.
- If the reassignment item no longer applies to the user, but the item still applies to the curriculum, you can unassign the curriculum from the user.

> **Note**
>
> When you remove the curriculum from users, all learning items in the curriculum are also removed, as well as the curriculum itself.

10.6 When and How to Decommission Curricula

Decommissioning is a general term for either deleting curricula or deactivating the curricula, but in both cases, you decide that the curricula should no longer be used.

Learning administrators decommission curricula when they are no longer valid or when they have expired. To decommission a curriculum, you usually deactivate it. By deactivating it, you have more control over how you manage the assignments.

In some unusual cases, however, you want to completely delete a curriculum. You most often delete a curriculum when it has never been assigned or used.

10.6.1 Deleting a Curriculum

Delete a curriculum when you're developing it, you make a mistake before you assign it, and you want to remove it from the system (otherwise, you want to deactivate the system).

Context

When you delete a learning curriculum, you remove the learning curriculum completely from the system. You can't recover the learning curriculum. Consider deleting learning curriculum when you simply make a mistake: for example, if you're developing a curriculum and before you assign it or make it active, you decide it's unnecessary or duplicated.

After you activate or assign the curriculum, you shouldn't delete it completely from the system because you want to keep it for reporting purposes. When you deactivate a curriculum, you keep the curriculum data in place, but remove it from active use.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum that you want to delete.
3. In *Actions*, click *Delete*.

   > **Note**
   >
   > To deactivate the curriculum: in *Actions*, click *Deactivate*.

4. Carefully read the warning about deleting, and then confirm that you want to delete this.

10.6.2 Deactivating a Curriculum

Because curricula have many, and complex, relationships to other parts of SAP SuccessFactors Learning, you must follow a deactivation process instead of simply inactivating them.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curricula*.
2. Find and open the curriculum that you want to deactivate.
3. In *Actions*, click *Deactivate*.

4. Select how you want the deactivation to occur.

If you select...	Then SAP SuccessFactors Learning...
Deactivate	deactivates the curriculum but leaves the relationships in place. For example, you might want to deactivate the curriculum but leave current assignments and relationships in place, select *Deactivate*. It's more likely, however, that you want to deactivate the curriculum and remove at least some of the relationships.
Deactivate, Unassign and Remove Relationships	Deactivates the curriculum and removes the relationships. When you select this, SAP SuccessFactors Learning prompts you with all the relationships that are relevant to the curriculum you're deactivating. If a relationship isn't relevant, you don't see it. You might, for example remove it from active libraries but leave it in assignment profiles.

5. Click *Submit*.

11 Libraries: Sets of Courses that Learners can Discover

Libraries define a set of SAP SuccessFactors Learning courses that users can browse, search, and access.

Libraries are a set of learning items (courses) in SAP SuccessFactors Learning. Users are assigned one or more libraries. When users browse or search for learning, they see the union of all learning items in all libraries that they're assigned.

Libraries also define the browsing and searching experience. You can feature some learning items in a library, for example, and those learning items are prioritized in the browsing experience. You can also change search algorithm and weights for learning items so that more important learning items appear higher in the results.

When users can find a learning item in their library, they can schedule themselves into the event. If it is a live event, they can launch the course immediately. If it is a live event, they can enroll into classes of the event or request a new schedule.

11.1 Creating Libraries

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

Context

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

Procedure

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

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

   User access to the library is controlled by assignment profiles, not by the domain you set here. For example, if your company has learning administrators for North America, you might have a domain called North America.

You add the library to the North America domain so that only North American learning administrators can change the contents of the library. For users, however, you might create an assignment profile that looks for users in North America and also looks for users in either Sales or Marketing and then assigns that pool of users to the library so that the North American Sales and Marketing employees can browse and search the library.

6. In *Discount Rate*, select a rate for users who are members of this library.

> **Note**
>
> If you aren't using commerce features to track transactions, then you can ignore *Discount Rate*. If you're using commerce features, then you probably set up your discount rates during implementation. If not, you can click *Add* ()to add a new discount rate for this library.

7. In *Contact Email*, type the email of the administrator who is responsible for this library so that other administrators can speak with the owner before making changes.
8. To hide the library while you build it, clear *Active*.

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

Next Steps

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

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

1. Library Summary Fields [page 354]
   Administrators use the Library Summary fields to manage general information about libraries.
2. Adding Learning Items to a Library [page 355]
   Add learning items to a library from the library view when you want to add many learning items to one library.
3. Adding Curricula to a Library [page 356]
   Add curricula to libraries so that users can browse and search for the libraries.
4. Adding Programs to a Library [page 357]
   Add programs to a library so that users can find and assign themselves programs and managers can assign programs to direct reports.
5. Managing the QuickGuides in a Library [page 358]
   You can manage the QuickGuides that users publish to libraries to curate the list of QuickGuides.
6. QuickGuides [page 358]
   QuickGuides are job aids that users can produce and then upload to their learning libraries to share with other users.
7. Enabling QuickGuides for Users [page 359]
   Enable QuickGuides for users so that your users can create quick how-to content and share it with other members of the company.
8. Enabling a Library to Receive Collections [page 360]
   If you enable it, learners can share collections with each other through a library and administrators can share collections out to learners.

9. Managing the Collections in a Library [page 361]
   Manage the collections in a library to control which users can look up and view collections of links that either an administrator or an end user created.
10. Placing Courses into Featured, New, and Revised Card Categories [page 362]
    Per library, place courses into categories so that when users browse for them, they see the courses' cards in the browsing categories.
11. Setting the Relevance of Libraries' Search Results [page 363]
    Set the relevance of libraries' learning items and curricula to influence the relevancy score of users' searches and move the items and curricula to the top of the list.
12. Setting the Search Tier of Libraries' Search Results [page 364]
    Set the search tier of learning items and curricula in a library so that users can group by search tier.
13. Changing the Price of a Learning Item in a Library [page 365]
    Change the price of a learning item in a library when you want a particular learning item in a particular library to have a price that is different from the default price.
14. Best Practices for Curating Learner Published Content [page 366]
    When you allow learners to create and publish their own learning content, you often want to curate their content.
15. Library Options [page 367]
    Library options are settings that you can change on individual contents in a library to change the way the content works in the library.

11.1.1 Library Summary Fields

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

Name	Description
Active	When you make an entity inactive, the system doesn't include that entity in any searches or reports by default; however, some searches and reports allow you to override the default so that you can include inactive entities. You might make an entity inactive (rather than delete it) if you no longer want to use it but keep it for a historical record. Because you can't restore a deleted entity, we recommend that you delete an entity only when you make a mistake in some way (for example, if the entity ID is incorrect).
Contact Email	We recommend that you record the e-mail address of the person who maintains or owns the entity so that other administrators have a contact if they need to use or modify the entity.
Description	Because the content of this box doesn't appear in the user interface or any reports, we recommend that you use the box to fully explain to other administrators the purpose for creating this entity.

Name	Description
Discount Rate	You can associate a discount rate with the library so that users can purchase items in the library at a discount. You can edit or create a discount rate in the Discount Rates section (*References* > *Finance* > *Discount Rates*).
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. A security domain is a security attribute of some SuccessFactors Learning Administration entities (but not all entities have security domains). Your security role determines which security domains you can access and which functions you can perform. What an administrator can access and do for an entity depends on how you configured the permission restrictions of the role ID that is associated with the administrator. For more information about how you can configure access to entities, see Security.

Parent topic: Creating Libraries [page 352]

Next task: Adding Learning Items to a Library [page 355]

11.1.2 Adding Learning Items to a Library

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

Prerequisites

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

Context

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

Procedure

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

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

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

Next Steps

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

Task overview: Creating Libraries [page 352]

Previous: Library Summary Fields [page 354]

Next task: Adding Curricula to a Library [page 356]

11.1.3 Adding Curricula to a Library

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

Prerequisites

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

Context

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

Procedure

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

Next Steps

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

Task overview: Creating Libraries [page 352]

Previous task: Adding Learning Items to a Library [page 355]

Next task: Adding Programs to a Library [page 357]

11.1.4 Adding Programs to a Library

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

Procedure

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

Next Steps

Set the library options for the programs you added.

Task overview: Creating Libraries [page 352]

Previous task: Adding Curricula to a Library [page 356]

Next task: Managing the QuickGuides in a Library [page 358]

11.1.5 Managing the QuickGuides in a Library

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

Procedure

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

   When *Include User Published Content* is set to *Yes*, users can publish QuickGuides to this library. If it's set to *No*, then users can't publish QuickGuides to this library.
4. Go to *QuickGuides*.
5. For each QuickGuide in the list, you can contact the author to manage the QuickGuide.

Task overview: Creating Libraries [page 352]

Previous task: Adding Programs to a Library [page 357]

Next: QuickGuides [page 358]

11.1.6 QuickGuides

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

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

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

Parent topic: Creating Libraries [page 352]

Previous task: Managing the QuickGuides in a Library [page 358]

Next task: Enabling QuickGuides for Users [page 359]

11.1.7 Enabling QuickGuides for Users

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

Procedure

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

   > → Tip
   >
   > Limit your search by *Role Type*: search for only end-user roles.
3. In *Permissions* add the permission Author QuickGuides.
4. Click *Apply Changes*.
5. Go to *Learning Activities* > *Libraries*.
6. Find and open the libraries where these users should be able to upload their QuickGuides.

   Open libraries that are accessible to the users who are in the role that you just updated.
7. Set *Include User Published Content* to *Yes*.
8. Go to *System Admin* > *Configuration* > *System Configuration* > *LIBRARY* and make sure that catalogSearchCategories[QuickGuide]=true.

Next Steps

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

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

Task overview: Creating Libraries [page 352]

Previous: QuickGuides [page 358]

Next task: Enabling a Library to Receive Collections [page 360]

11.1.8 Enabling a Library to Receive Collections

If you enable it, learners can share collections with each other through a library and administrators can share collections out to learners.

Prerequisites

Read the best practices for user published content in libraries.

Context

You can enable administrators to create collections, you can enable learners to create collections, or you can enable both to create collections. Regardless of who can create collections, the users need a place to post their collections to share them. That place is a library.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Learning Activities* > *Libraries*.
2. Search for the library that should receive collections and open it.
3. Set *Include User Published Content* to *Yes*.
4. Click *Save*.

Task overview: Creating Libraries [page 352]

Previous task: Enabling QuickGuides for Users [page 359]

Next task: Managing the Collections in a Library [page 361]

11.1.9 Managing the Collections in a Library

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

Procedure

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

Task overview: Creating Libraries [page 352]

Previous task: Enabling a Library to Receive Collections [page 360]

Next task: Placing Courses into Featured, New, and Revised Card Categories [page 362]

Related Information

Learning Collections: Lists of Hyperlinks [page 406]
Best Practices for Curating Learner Published Content [page 366]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling a Library to Receive Collections [page 360]
Creating a Learning Collection as an Administrator [page 409]
Enabling Administrators to Create Collections [page 411]

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

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

Context

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

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

Procedure

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

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

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

Task overview: Creating Libraries [page 352]

Previous task: Managing the Collections in a Library [page 361]

Next task: Setting the Relevance of Libraries' Search Results [page 363]

11.1.11 Setting the Relevance of Libraries' Search Results

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

Prerequisites

You need a library with learning items assigned to it.

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

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

Context

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

Procedure

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

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

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

Task overview: Creating Libraries [page 352]

Previous task: Placing Courses into Featured, New, and Revised Card Categories [page 362]

Next task: Setting the Search Tier of Libraries' Search Results [page 364]

11.1.12 Setting the Search Tier of Libraries' Search Results

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

Context

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

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

Procedure

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

   You can have up to five tiers, so think of the five most important themes of learning. Then assign the most important to tier 1, second to tier 2, and so on, to tier 5.

2. Go to *References* > *Manage Labels* > *Labels* and search for label IDs that start with **`label.catalog.searchresultsbooster.dropdown.`**.

   You see five results, each representing one of the five search tiers. For example, `Tier1DisplayValue` represents tier one and `Tier2DisplayValue` represents tier 2.

3. For each of the five tiers, click the *Edit* button, go to the *Locales* tab, and type the name of the search tier for each language.

   If your top search tier is "Courses for Certification", click the edit button for `Tier1DisplayValue`, go to the *Locales* tab, and type **`Courses for Certification`** in the *English Label Value* box. For each additional

language, type the translation of "Courses for Certification" so that users see the search tier in their own languages.

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

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

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

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

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

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

Task overview: Creating Libraries [page 352]

Previous task: Setting the Relevance of Libraries' Search Results [page 363]

Next task: Changing the Price of a Learning Item in a Library [page 365]

11.1.13 Changing the Price of a Learning Item in a Library

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

Procedure

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

Task overview: Creating Libraries [page 352]

Previous task: Setting the Search Tier of Libraries' Search Results [page 364]

Next: Best Practices for Curating Learner Published Content [page 366]

Related Information

Viewing a Library's Assignment Profiles [page 375]

11.1.14 Best Practices for Curating Learner Published Content

When you allow learners to create and publish their own learning content, you often want to curate their content.

In SAP SuccessFactors Learning, we talk about enabling your learners to be **content curators** because we have found that your learners are already content curators: they bookmark their own information, they email each other lists of links, they share instructions that they've learned through their own hard-earned experiences, and they're often hidden experts in your organization. We also understand, however, that not every employee really is an expert and not every employee has something to contribute.

> **Note**
>
> In SAP SuccessFactors Learning, a learner is a security persona: someone who is acting not as an administrator or an instructor but as someone who would **typically** consume learning.

Curating the Creators

Not every employee is really an expert, so you can manage the list of learners who you allow to create content. For example, you can create a new role for collection makers that has the standard permissions but also adds the permission to create collections. You can assign that role to a subset of all your employees. This enables some users to create collections but not all users.

Curating the Content

Even if you enable content creation for only some users, those users can create content that you don't want other users seeing. Because we manage user created content through libraries, you can use libraries to curate the content. We recommend this strategy for curating the content through libraries:

- Enable a single library to receive user published content and then assign that library to users who you want to receive user published content.
- Use reports to check the popularity of content in the library. You want to monitor the popularity of content in the library because they need your attention: if they're good, you might want to feature them or recommend them, but if they're bad, you might want to remove them.

Parent topic: Creating Libraries [page 352]

Previous task: Changing the Price of a Learning Item in a Library [page 365]

Next: Library Options [page 367]

Related Information

Looking up Learning Collection Views [page 414]
Reporting on Learning Collection Views [page 413]

11.1.15 Library Options

Library options are settings that you can change on individual contents in a library to change the way the content works in the library.

A library is a collection of learning content that you show to a user. Learning content is, for example, learning items, curricula, and programs. For some content, you can change the library options, which changes how the content behaves in the library. For example, setting content to featured brings it to the attention of users when they are browsing for learning opportunities.

Parent topic: Creating Libraries [page 352]

Previous: Best Practices for Curating Learner Published Content [page 366]

11.1.15.1 Library Search Results Booster

Library Search Results Booster is a general term for ways that a learning administrator can raise the visibility of learning objects in users' libraries.

Administrators can boost a learning item or a curriculum to a higher position in the library search results page (when users search for courses in the *Find Learning* tile). Consider boosting results when you have several courses that have courses with similar titles or that contain the same key words, but you want to boost one of the similar courses over the other.

The Library Search Results Booster contains two mechanisms:

- Search Weight: You add a multiplier to individual curricula and learning items to increase the relevancy score. A relevancy score is the result of a search algorithm. You insert a multiplier to the algorithm.
- Search Tier: A search tier is a layer of results. One way to think about it is as a "group by" in search results. Users can sort by (group by) the tier and then sort within the tier by relevancy. Tiers are ordered 1-5.

11.1.15.2 Advice for Using Search Tier and Search Weight

Before you use search tier and search weight, consider how you use libraries.

Although you can use both Search Weight and Search Tier together, most customers should consider one or the other depending on your library strategy. Although there is no technical limitation to using them together, consider how you want learners to experience the boosting strategies.

Most customers can use the default relevancy score for all objects in their libraries. When you use the default relevancy score, learners find search results that are closest to their search strings. When you add a search weight, you override the default relevancy score with a multiplier. To hide the search weight, remove the Edit Library Search Relevance Booster permission from your administrator roles.

Some customers can use library flags in the place of search tiers. Flags work similarly, but have less configuration and are easier for learners to see. To hide the search tier, remove the Edit Library Search Relevance Booster permission and remove `Tier` from `catalogSearchSortByOptionsOrder` in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*.

Related Information

Library Search Results Booster [page 367]
Placing Courses into Featured, New, and Revised Card Categories [page 362]
Setting the Relevance of Libraries' Search Results [page 363]
Setting the Search Tier of Libraries' Search Results [page 364]

11.1.15.3 Library Options

When you add an object (like a learning item) to a library, you can use library options to change how it behaves within the library.

You can change the library options for a library entry any place that you associate learning items, curricula, or other entries into a library.

Library Options

This Field...	...Is Used as Follows
Highlight As, Highlight Until, and Reason	Highlight a library entry to categorize it as new, revised, or featured. The highlight category helps users find learning item from within all the learning items in the library. If you select a value from the *Highlight As* list, then you must select a date that the system removes the highlight category from the item or curriculum in the library. You set the date in *Highlight Until* box. The entry remains highlighted until the date that you set in *Highlight Until*. You can type an explanation for why the entry is highlighted in *Reason to Highlight*. For example, you tell users that a learning item is featured because of a company-wide initiative. You can't localize (translate) *Reason to Highlight*.
Remove from Library On	This is the date after which an entry disappears from the library. The entry isn't inactivated. It's only disassociated with the library. The Purge Expired Library Items automatic process removes expired entries.
Search Weight and Search Tier	Search weight and search tier affect the relevance search of a library and the tier that an entry returns into (respectively).

11.1.15.4 Curricula Fields in a Library

These fields influence how a curriculum behaves in a library.

This field...	...Is Used as Follows
SKU	Stock Keeping Unit (SKU) is a unique inventory ID for each item in the library. If you know the item's SKU, you can enter it in the *SKU* box or click *add one or more from list* to locate and select multiple SKUs. You must select the *Add* checkbox for each SKU that you want to add to the library. In addition, you can also select the *Add Items to Library* checkbox to allow users to self-register for or launch free-floating items that are associated with each SKU.
Add Items to Library	For every curriculum or SKU that you add to the library, you can select the *Add Items to Library* checkbox to allow users to self-register for or launch free-floating items that are associated with the curriculum.

This field...	...Is Used as Follows
Available in Library	When this read-only field displays the value **Yes**, the item appears in the library. If this value is **No**, then you can't associate the item with a library. **Note** To change this value, you must find the item SKU in the Master Inventory (*Finance* > *Master Inventory*) and select or clear the *Available in Library* checkbox.
Library Options	These are the standard library options for any library entry.

11.2 Assigning Libraries to Learners

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

Prerequisites

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

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

Context

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

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

Procedure

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

Example

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

Next Steps

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

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

11.3 When and How to Decommission Libraries

Decommission libraries when the set of courses is no longer relevant to your users.

Decommission libraries when the library has reached the end of its usefulness and you want to hide its unique set of courses from users. For example, if you created a library for a sales office in France and a second library for a

sales office in Germany and you decide to consolidate the offices into a single European office, you might want to create a new European library and decommission the separate German and French libraries.

> → Tip
>
> You almost always decommission libraries by inactivating them, not deleting them. Typically, you delete libraries only if you never exposed them to users.

Before you decommission libraries, you might want to check the library's assignment profiles. If you find assignment profiles for the library, it could be that another administrator still intends it to be used. You might also want to keep the library and simply deactivate the assignment profile. To continue the example of the French and German libraries, you might also want to deactivate the assignment profiles that assigned separate German and French libraries so that the Assignment Profile Execute Updates process no longer processes outdated jobs.

Inactivating a Library [page 372]
Inactivate a library to keep the library data in place, but remove it from active use.

Deleting a Library [page 373]
Delete a library when you want to remove it completely.

Related Information

Deactivating Assignment Profiles While Preserving Learning Assignments [page 397]
Deactivating Assignment Profiles and Removing its Learning Assignments [page 398]
Deactivating an Assignment Profile [page 396]

11.3.1 Inactivating a Library

Inactivate a library to keep the library data in place, but remove it from active use.

Context

Inactivating a library takes it offline: users can't access the contents of the library for the time that it in 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.

Procedure

1. Go to Learning Administration, and then go to *Learning Activities* > *Libraries*.
2. Find and open the library that you want to inactivate.
3. Set *Active* to *Inactive*.

Task overview: When and How to Decommission Libraries [page 371]

Related Information

Deleting a Library [page 373]

11.3.2 Deleting a Library

Delete a library when you want to remove it completely.

Context

When you delete a library, you remove the library record completely from the system. You can't recover the library. Consider deleting libraries when you simply make a mistake: for example, if you add a library you didn't intend to add.

As an alternative, you can make it inactive. When you inactivate a library, you keep the library data in place, but remove it from active use.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Libraries*.
2. Find and open the library that you want to delete.
3. Click *Delete*.

Task overview: When and How to Decommission Libraries [page 371]

Related Information

Inactivating a Library [page 372]

11.4 Enabling Item Recommendations Property

Enable item recommendations to allow users to recommend items and programs to their peers. This property also enables the administrator recommendations visible in the Recommendations Email Newsletter and *Recommended Collections* tab of the *Collections* page for learners.

Procedure

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

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

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

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

11.4.2 Learning Recommendations Tile and Recommended for You Library Category

You can enable the *Recommendations* tile, the *Recommended for You* library category, or both depending on how you want your system to work.

If you have enabled recommendations, you can choose from different levels of exposure. You can allow the Learning Management System (LMS) to find the recommendations and expose the recommendations that users have in their libraries.

If you enable recommendations, users see a *Recommended for You* category in their libraries. Recommendations can appear in that category if the course is in the users' libraries. Because the LMS checks that users have access to the recommended learning experience before they can see it, you effectively have a security check on the recommendations. This works well if you have a formal structure to your LMS.

11.5 Library Troubleshooting Strategies

Most troubles with libraries are assignment issues, so the library troubleshooting strategies help you see how the library is assigned and what users see when they're assigned their libraries.

We recommend that you start library troubleshooting by looking at how the libraries are assigned to users. Then, if the assignments look correct, make sure that the Assignment Profile Execute Updates process is running properly to **make** the assignments. Finally, you can check, from the users' perspectives, how they're experiencing the libraries.

Looking at the library from users' perspectives is most helpful if the libraries seem to be assigned properly but users are experiencing another problem. For example, users might not see the featured courses in a way that you expect. You can look at the libraries as users experience them.

11.5.1 Viewing a Library's Assignment Profiles

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

Context

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

Procedure

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

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

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

6. To remove an assignment profile, select its *Remove* checkbox and then click *Save*.

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

11.5.2 Creating Library Directed Search Direct Links

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

Context

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

Procedure

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

Results

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

12 Assignment Profile Process for Bulk Assignment

When you create assignment profiles, you follow a multi-step process. The many steps help assure accuracy and performance for a process that assigns many courses (or other things) to many users.

When you create assignment profiles, you first check your prerequisites, you create the assignment profile, and then you push the assignment profile. The prerequisites are usually handled during implementation, but because the assignment profile can affect a large number of users, you should check that you've populated the attributes that you want to use to pool the users. You create the assignment profile by adding rules that pool the users into a group for assignment. Finally, when you push the assignment profile, you execute changes and update users and assignments for the assignment profile so that it's ready for the next automatic process run.

12.1 Creating an Assignment Profile

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

Prerequisites

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

Context

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

Procedure

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

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

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

5. Choose *Save*.

1. Basic Assignment Profile Configuration [page 378]
   When you first create an assignment profile, you shape it with this basic configuration, but most of the changes in assignment profiles are made by changing their rules.
2. Setting Up Assignment Profile Rules [page 380]
   Set up the rules of an assignment profile to determine who is added to the assignment profile pool.
3. Executing Changes for Assignment Profile Rules [page 382]
   Executing changes attaches the users who are captured by the rules (the pool of users) with the assignments (libraries, curricula, and so on) in the assignment profile.
4. Manually Updating Assignment Profiles [page 383]
   Manually update users and assignments for assignment profiles when you don't want to wait for the Automatic Process Manager (APM) to pool users according to existing rules.
5. Checking an Assignment Profile Pool [page 384]
   Check an assignment profile pool to see the list of users captured by the assignment profile and pooled together for assignments.
6. Assignment Profile Propagation Status [page 385]
   When you're building an assignment profile, the propagation status tells you how far along you are in the process of **creating** the assignment for users at run time.
7. User Attributes Available to Assignment Profiles [page 385]
   When you implement SAP SuccessFactors Learning, assignment profile attributes are critical user attributes because they control how you can pool users together to assign them courses.

12.1.1 Basic Assignment Profile Configuration

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

This Field...	...Is used as follows
Active	This tells you if the assignment profile is actively making assignments or not. Because assignment profiles actively make learning assignments, you can't simply deactivate them like other parts of SAP SuccessFactors Learning. Instead, we guide you through a deactivation process. To deactivate assignment profiles, click *Deactivate* in the *Actions* menu.

This Field...	...Is used as follows
Contact Email, and Created For	You often want a single person or only a few people to manage assignment profiles because changes can have far-reaching effects. If you're the person in charge of this assignment profile, you want to type your email address so that other administrators can contact you about changes and you can manage those changes carefully. If you're returning to edit the assignment profile, you can use *Created For* to understand the person who originally requested the assignment profile. Check with this person before you make changes. If you're someone requesting a change, you can use the contact email to find the person who can change them for you. Be sure that the right person's name is in *Created For* so that you can coordinate the changes.
Notes	The *Notes* field helps you understand how and why the assignment profile was built. Although you can use the *Description* field to describe the main purpose or rationale for creating the assignment profile, you might need more need space to record additional information about why you created the assignment profile or any special instructions for maintaining the entity. In these cases, we recommend that you use the *Notes* field.
Description	Because the content of this field doesn't appear in the user interface or any reports, we recommend that you use the field to fully explain to other administrators the purpose for creating this entity.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.

Parent topic: Creating an Assignment Profile [page 377]

Next task: Setting Up Assignment Profile Rules [page 380]

Related Information

Deactivating Assignment Profiles While Preserving Learning Assignments [page 397]
Deactivating Assignment Profiles and Removing its Learning Assignments [page 398]

Deactivating an Assignment Profile [page 396]
Setting Up Assignment Profile Rules [page 380]

12.1.2 Setting Up Assignment Profile Rules

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

Prerequisites

Create an assignment profile and add its basic information.

Context

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

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

Procedure

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

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

Groups allow you to create more complicated evaluations. Groups are joined by OR. You can think of them as parenthesis around an equation (Group 1) OR (Group 2). For example, (Job Code = "Senior Sales Associate" AND Region = "West") OR (Job Code = "Senior Sales Associate" AND Alternate Job Code = "Manager").

6. Choose *Add Rule* to add the rules that users are evaluated against for membership to the group.
   a. Select an attribute of users to test.

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

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

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

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

Next Steps

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

Task overview: Creating an Assignment Profile [page 377]

Previous: Basic Assignment Profile Configuration [page 378]

Next task: Executing Changes for Assignment Profile Rules [page 382]

Related Information

Executing Changes for Assignment Profile Rules [page 382]
User Attributes Available to Assignment Profiles [page 385]

12.1.3 Executing Changes for Assignment Profile Rules

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

Prerequisites

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

Context

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

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

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Manage Users Learning* > *Assignment Profiles*.
2. Find and open the assignment profile that you want to propagate.
3. In *Actions* click *Execute Changes*.

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

Next Steps

Update users and assignments for the assignment profile.

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

Task overview: Creating an Assignment Profile [page 377]

Previous task: Setting Up Assignment Profile Rules [page 380]

Next task: Manually Updating Assignment Profiles [page 383]

12.1.4 Manually Updating Assignment Profiles

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

Prerequisites

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

Context

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

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

Procedure

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

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

   The dialog for scheduling a job to update the users and assignments opens.
4. Schedule the background job based on your preferences.

5. Choose *Finish*.

Task overview: Creating an Assignment Profile [page 377]

Previous task: Executing Changes for Assignment Profile Rules [page 382]

Next task: Checking an Assignment Profile Pool [page 384]

12.1.5 Checking an Assignment Profile Pool

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

Context

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

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

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

Procedure

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

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

Task overview: Creating an Assignment Profile [page 377]

Previous task: Manually Updating Assignment Profiles [page 383]

Next: Assignment Profile Propagation Status [page 385]

12.1.6 Assignment Profile Propagation Status

When you're building an assignment profile, the propagation status tells you how far along you are in the process of **creating** the assignment for users at run time.

This status...	...Reflects this state
Add Pending or *Delete Pending*	You have made changes to the assignment profile, to either add or remove assignments to users in the assignment profile pool, but you haven't yet propagated it to finalize the attachments of the assignments to the assignment profile rules. As a result, the end users in the pool haven't picked up your changes.
Valid	You've propagated the assignment profile and your configuration is ready to be applied the next time that the assignment profile synchronization process runs. A *Valid* status doesn't necessarily mean that users see their assignments. It could be that the assignment profile synchronization process has not run to **apply** your new, propagated configuration.

Parent topic: Creating an Assignment Profile [page 377]

Previous task: Checking an Assignment Profile Pool [page 384]

Next: User Attributes Available to Assignment Profiles [page 385]

12.1.7 User Attributes Available to Assignment Profiles

When you implement SAP SuccessFactors Learning, assignment profile attributes are critical user attributes because they control how you can pool users together to assign them courses.

> **Note**
>
> An Assignment Profile rule with an operator of "Matches" or "Does Not Match" can't accept a value that includes double quotes (").

User Attributes for Assignment Profiles	Description
Domain ID	A common way to pool users is to set the domain scope, which is required to limit the selection set of users **and then also** set a domain as a selection criteria. For example, if you want to assign courses to all users in the South American domain, you can set the selection domain as South America and then also create a pool of all users in the South America domain. You select the South America domain twice because the assignment profile requires a domain to limit its search. The first selection limits the search and the second pools the users.
Organization ID	Organizations are useful grouping mechanisms for both including and excluding users from an assignment pool. For example, you can put all users an a manufacturing organization into a pool. Or, if all users in a South America domain are in manufacturing **except** for the human resources staff, you can put all users from a South America domain into a pool and then **exclude** the human resources organization.
Job Code ID	If you need all safety officers to receive the same training, and safety officer is a job code, you can assign the learning to users based on their job code.
Alternate Job Code ID	Many companies use an alternate job code ID, particularly in manufacturing. If you need all safety officers to receive the same training, and safety officer is a job code, you might want to assign the learning to users regardless of whether Safety Officer is their primary or alternate job code.
Address	You often group users by their location - for example all users in a physical address should receive the same courses.
City	You often group users by their location - for example all users in a city should receive the same courses.
State	You often group users by their location - for example all users in a state should receive the same courses.
Postal Code	You often group users by their location - for example all users in a postal code should receive the same courses. Postal Code is useful when you want to divide a state. For example, you could add all postal codes around a city to include the suburbs and nearby towns as well as the city.
Country	You often group users by their location - for example all users in a country should receive the same courses.
Job Location ID	Although job location seems important to assign users in a region to courses, many customers use address fields instead because they offer a more precise selection attribute. Depending on your implementation, however, job location can be a useful selection attribute. For example, a user with a home office might have an address in Berlin but a job location in London. You might want to assign learning based on the location where the user is assigned (London) instead of the physical location of the person (Berlin).

User Attributes for Assignment Profiles	Description
Region ID	Region ID is not often used to assign courses to users because region is most often created to locate training facilities and instructors. While users can also be in a region, their region usually does not match their location as closely as their physical address.
Employee Type ID	Employee types are set during implementation and they reflect your business model. They can be, for example, full time, contractors, contingent workers, and so on. You often want to assign courses to all full time employees, for example, and not to contractors or contingent workers.
Employee Status ID	Use employee status with assignment profiles to automatically assign courses to users based on their employee status. It is a description, matched to your business, of the current relationship of the employee to the business. For example: full time, family leave, disability leave, and so on. You often want to assign courses by these categories. Some customers do not want to import employee status metadata to Learning because they want to compartmentalize information. Learning administrators don't need to know your employees' employment status and employee type can be a good substitute for employee status.
Is Full-Time	In SAP SuccessFactors Learning, the user attribute *Is Full Time* is a legacy attribute. It was added to support Plateau Compensation, a product that we no longer support. Instead of using *Is Full Time* to indicate that someone is a full time user, please use *Employee Type* instead. *Employee Type* is a more accurate and more powerful way to categorize your employees because you can, for example, add employee types of Full Time Contractor and Full Time Employee: both work a full week but one is an internal employee and the other is a contractor. When you assign learning, therefore, you can more accurately target the assignment with (for example) full time users who are internal, full time users who are contractors, or both.
Regular/Temp	The *Regular / Temp ID* is a Learning attribute that is custom-built for the training planner. Few customers use training planner, so most customers can ignore it and instead use *Employee Type*. Employee types are more common and they map to standard a standard Platform field (`EMPLOYEE-CLASS`). Ignore *Regular / Temp ID* if you do **not** use training planner.
Hire Date	Hire date can be used, for example, for retraining: if you want to assign courses to all users who were hired more than five years ago.
Hire Month	
Item Completion (opt. "Include Substitute Completions")	Item completions are a common way to assign the **next** course. For example, if you have a set of mechanics in job code, you can pool the mechanics who completed the "Basic Diesel Maintenance" course, so that you can assign them the "Advanced Diesel Maintenance" course.

User Attributes for Assignment Profiles	Description
User ID	User ID is useful for both including and excluding specific people from an assignment profile. For example, if you want to assign a course to everyone in Japan except for executives, you can exclude the executives by user ID.
User is a Manager	Indicates if the user is also a manager.
Supervisor ID	Supervisor ID is not as useful as a selection as other user attributes, but assignment profiles can find all users who share a manager.
All User Custom Columns	User custom fields of type integer, decimal and string can be used to store custom user attributes. If a User Custom Field is not showing up, make sure to run the Assignment Profile Execute Changes Automatic Process.

Parent topic: Creating an Assignment Profile [page 377]

Previous: Assignment Profile Propagation Status [page 385]

12.2 Assigning Libraries to Learners

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

Prerequisites

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

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

Context

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

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

Procedure

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

Example

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

Next Steps

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

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

Related Information

Creating an Assignment Profile [page 377]
Assignment Profile Process for Bulk Assignment [page 377]
Executing Changes for Assignment Profile Rules [page 382]
Manually Updating Assignment Profiles [page 383]

Assignment Profile Propagation Status [page 385]

12.3 Assigning Courses to Learners

Assign courses to learners with assignment profiles to assign them in bulk based on the learners' attributes.

Context

To assign courses in bulk, assign them based on a learner attribute. For example, all learners in a country/region might need the same training or all learners in a job position might need the same training. Assignment profiles allow you to match learners, through a set of rules, with the correct assignments.

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

Procedure

1. Go to Learning Administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Click *Add New* to create a new assignment profile.
3. In the new assignment profile, define the rules of the assignment profile.

   The rules create a pool of learners by learner attribute. All learners in the pool get the same assignment.
4. Go to the type of assignment that you want to add.
   - Go to *Items* to assign learning items to the learners in the pool. Learning items are stand-alone courses.
   - Go to *Curricula* to assign curricula to the learners in the pool. Curricula are groups of courses that learners must retrain on. You typically use them if your learners must qualify in a subject.
   - Go to *Programs* to assign learning programs to learners in the pool. Learning programs are groups of courses that don't count for qualification.
5. Click + (*Add Items*, *Add Curricula*, or *Add Programs*) to add the course or courses to the learner pool.
6. Execute changes and update users and assignments for the assignment profile.

Related Information

Assignment Profile Pools [page 402]
Curricula: Bundled Courses in Qualification Tracks [page 273]

Courses: Fundamental Building Blocks of Learning [page 34]
Learning Programs: Bundled Courses in a Syllabus [page 258]
Creating an Assignment Profile [page 377]
Assignment Profile Process for Bulk Assignment [page 377]
Executing Changes for Assignment Profile Rules [page 382]
Manually Updating Assignment Profiles [page 383]
Assignment Profile Propagation Status [page 385]

12.4 Assigning Curricula to Learners

Assign curricula to learners with assignment profiles so that when users' attributes change, they're automatically assigned or unassigned the curriculum.

Prerequisites

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

- Create curricula in *Learning Activities* > *Curricula*.
- Create assignment profiles in *Manage User Learning* > *Assignment Profiles*.

Context

When you assign a curriculum through assignment profiles, users are assigned and unassigned from the curriculum based on their attributes. For example, if all users in the Information Technology (IT) organization must remain qualified on IT Security with a curriculum, you can create an assignment profile that looks for all users in the IT organization and assigns them the curriculum. When users are added to the IT organization, they get the curriculum assignment. When users are removed from the IT organization, they lose the curriculum assignment.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Create an assignment profile and the rules that define who should get the assignment.
3. In *Curricula*, add the curriculum.

Next Steps

After you add curricula to an assignment profile, you execute changes for the assignment profile to complete the association of curricula to the learners in the pool. After you execute changes, learners see the libraries as part of their *Find Learning* tile.

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

12.5 Recommending Courses to Pools of Learners

To recommend learning to a group of learners, you group learners in an assignment profile, and you attach the recommendations to the assignment profile.

Prerequisites

To recommend courses to pools of learners, enable recommendations.

Context

When you, as a learning administrator, recommend learning to learners, you push that learning experience onto learners' *Recommended* tile and their *Recommended for You* category in their catalogs. For learners to see a recommendation, the recommended object (collection, learning item, or program) must also be in the learners' catalogs.

You might, for example, recommend an Information Technology Basics program for managers. You can create an assignment profile to capture all managers and add the recommended program in the assignment profile's *Recommended Programs* area. You can also recommend learning items (courses) in *Recommended Items* and collections of courses in *Recommended Collections*.

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

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Click *Add New* to create a new assignment profile.
3. In the new assignment profile, define the rules of the assignment profile.

   The rules create a pool of learners by learner attribute. All learners in the pool get the same recommendations.
4. Go to the type of recommendation that you want to add.
   - Go to *Recommended Items* to recommend learning items to the learners in the pool. Learning items are stand-alone courses.
   - Go to *Recommended Collections* to recommend collections to the learners in the pool. Collections are a set of links.
   - Go to *Recommended Programs* to recommend learning programs to learners in the pool. Learning programs are groups of courses that do not count for qualification.
5. Click **Add** to add the recommendations to the learner pool.
6. Propagate the assignment profile and manually synchronize the assignment profile.

Related Information

Creating an Assignment Profile [page 377]
Assignment Profile Process for Bulk Assignment [page 377]
Executing Changes for Assignment Profile Rules [page 382]
Manually Updating Assignment Profiles [page 383]
Assignment Profile Propagation Status [page 385]

12.6 Scheduling Assignment Profiles to Update Automatically

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

Context

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

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

Procedure

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

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

Assignment Profile Synchronization Processing [page 394]
Assignment profile synchronization is the process that SAP SuccessFactors Learning uses to automatically assign and unassign things to users.

How the Assignment Profile Synchronization Automatic Process Handles Plans and Goals [page 395]
View this section if you want to know how the assignment profile synchronization automatic process handles plans and goals.

12.6.1 Assignment Profile Synchronization Processing

Assignment profile synchronization is the process that SAP SuccessFactors Learning uses to automatically assign and unassign things to users.

Conceptually, the assignment profile synchronization automatic process automatically creates pools of users (pooled by their attributes) and then matches them with the assignments in the assignment profile. For example, if an assignment profile rule is "region equals North America," the assignment profile synchronization process looks for all users who are currently in the region North America, adds them to the pool, and then looks at the assignment profile to see which objects should be assigned to users in that pool. If a user has moved into the North America region since the last time it ran, the user is added to the pool and is matched to the assignments listed on the assignment profile record. Although that's how it works conceptually, the processing logic is a little different.

The process sorts users into the following categories based on changes to their attributes:

- User is moving into assignment profile: for example, the assignment profile matches users in North America and the user's region changed to North America. If a user moves into an assignment profile, then the system associates all assignments of the assignment profile with the user.
- User is moving out of assignment profile: for example, the assignment profile matches users in North America and the user's region changed to Africa. If a user moves **out**of an assignment profile, the system removes only the assignments of the assignment profile from the user.
- User isn't moving (the process skips these users)

Importantly, assignment profiles honor any changes that you make directly to a user's assignments. If you go to a user's record and remove an assignment made by an assignment profile (for example, if you go to *Users* > *Assigned Items* and delete an assignment made by an assignment profile), the process doesn't restore the deleted assignment when it next runs. This is purposefully limited design: the process is responsible only for adding and removing assignments when the attributes of a user changes.

In the same way that the process honors deletions made by you, it also honors additions made by you. It doesn't remove any assignment that you added, even if that assignment was also in the assignment profile. For example, if an assignment profile assigns "Tax Law for the North American Trade Agreement" when users are in the North American region, but you also went to *Users* > *Assigned Items* and added "Tax Law for the North American Trade Agreement" to a user, and then that user's region changed to Africa, "Tax Law for the North American Trade Agreement" remains in the user's assignments.

Additional Information About Assignment Profile Synchronization Processing

This process uses the `ApmSynchronizeStudentChangesAssignmentProfile` template ID to create and send notifications. The assignment profile synchronization automatic process sends notifications when it finds that a user has been moved into or out of an assignment profile. How does the Assignment Profile Synchronization automatic process handle plans and goals?

Propagation and synchronization are two different processes. Anytime an assignment profile is created or changed, it must be propagated through a background job before it can be synchronized through the automatic process. Assignment profiles that aren't propagated are skipped during the assignment profile synchronization process.

You control assignment profile synchronization in *System Administration* > *Automatic Processes* > *Assignment Profile Synchronization*.

Parent topic: Scheduling Assignment Profiles to Update Automatically [page 393]

Related Information

How the Assignment Profile Synchronization Automatic Process Handles Plans and Goals [page 395]
Automatic Process Templates [page 1146]
Scheduling Learning Automatic Processes [page 1245]

12.6.2 How the Assignment Profile Synchronization Automatic Process Handles Plans and Goals

View this section if you want to know how the assignment profile synchronization automatic process handles plans and goals.

The assignment profile synchronization automatic process can add and remove administrator-created plans (and the goals on that plan) based on the status (draft or approved) of the plan in the user interface.

Adding Plans or Goals (users move into an assignment profile)

If you selected the *Force new plan* check box for that plan on the assignment profile (*Users* > *Assignment Profiles* > *Plans tab* >), then the system adds a new plan with all of its goals.

If you cleared the *Force new plan* check box for that plan on the assignment profile (*Users* > *Assignment Profiles* > *Plans tab* >), then the system creates a new plan (if there is not an existing plan with the same plan period and type) with all of the associated goals. If the user has an existing plan with the same plan period and type, then the system does not create a new plan. The system adds any goals to the existing plan.

Removing Plans or Goals (users move out of an assignment profile)

The system never removes an **approved plan or its goals** when you propagate or synchronize an assignment profile.

If the **administrator-created** plan is in draft status, then the system deletes the plan and goals when you propagate or synchronize an assignment profile.

If the **user-** or **supervisor-created** plan is in draft status and administrator-created **goals** were added to that plan, then the system does not delete the plan when you propagate or synchronize an assignment profile. The system does, however, delete the administrator-created **goals** from that plan.

Parent topic: Scheduling Assignment Profiles to Update Automatically [page 393]

Related Information

Assignment Profile Synchronization Processing [page 394]

12.7 Deactivating an Assignment Profile

Deactivate an assignment profile when you no longer want the assignment profile to make new assignments.

Context

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.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Find an open the assignment profile that you want to deactivate.
3. In *Actions*, choose *Deactivate*.
4. Decide if you want to simply deactivate the assignment profile or if you want to deactivate it **and** remove existing assignments made by the assignment profile.
   - If you select *Deactivate*, the assignment profile stops adding users to the assignment profile group (stops making its assignments to new users), but the existing assignments stay with the users.
   - If you select *Deactivate and Unassign*, the assignment profile is deactivated **and** users' learning assignments are removed. The system follows the same behavior when an assignment profile removes an assignment as when an administrator removes an assignment directly.
5. Choose *Save*.

Deactivating Assignment Profiles While Preserving Learning Assignments [page 397]
When you deactivate assignment profiles in SAP SuccessFactors Learning, you can leave the assignments in place while preventing the assignment profile from making additional assignments.

Deactivating Assignment Profiles and Removing its Learning Assignments [page 398]
When you deactivate assignment profiles in SAP SuccessFactors Learning, you can remove any assignments that it made **and** prevent the assignment profile from making additional assignments.

12.7.1 Deactivating Assignment Profiles While Preserving Learning Assignments

When you deactivate assignment profiles in SAP SuccessFactors Learning, you can leave the assignments in place while preventing the assignment profile from making additional assignments.

When deactivating an assignment profile you are presented with two options. You can *Deactivate* or *Deactivate and Unassign*. If you click *Deactivate*, users are not assigned any new learning from the assignment profile, but the old assignments made by the assignment profile are grandfathered.

For example, consider an assignment profile called “Month-Long Onboarding” that assigns a one month onboarding program for to new employees. You might want to replace the month-long onboarding program with a new three week program, but you might want to allow the employees with the month-long program to finish it. You want “Month-Long Onboarding” to stop making new assignments but keep its existing assignments in place. Users who are presently assigned the month-long program keep it in their *Learning Assignments*.

You can create a new assignment profile called “Three-Week Onboarding” that assigns the new three week long assignment profile to assign the new three week program to users who started today or later. Because no new employees are added to the “Month-Long Onboarding” assignment profile, none of the more recently hired employees are assigned the month-long program.

The “Month-Long Onboarding” assignment profile enters the “Paused/Deactivated” state. From this state, you can:

- Reactivate it by going to *Actions* > *Reactivate*. If you reactivate it, it starts making the assignments again (new users are given the month-long onboarding program).

- Remove the existing assignments by going to *Actions* > *Unassign*. If you unassign, then the month-long program disappears from users' *Learning Assignments*.

Parent topic: Deactivating an Assignment Profile [page 396]

Related Information

Deactivating Assignment Profiles and Removing its Learning Assignments [page 398]

12.7.2 Deactivating Assignment Profiles and Removing its Learning Assignments

When you deactivate assignment profiles in SAP SuccessFactors Learning, you can remove any assignments that it made **and** prevent the assignment profile from making additional assignments.

When deactivating an assignment profile you are presented with two options. You can *Deactivate* or *Deactivate and Unassign*. If you click *Deactivate and Unassign*, any existing learning assignments made by the assignment profile are removed. SAP SuccessFactors Learning removes the assignments made from the profile according to the standard rules of unassigning learning. For example, completed learning items stay on the users' learning history.

For example, you might deactivate and unassign if you created a curriculum for certification and the certification rules changed. The old curriculum is no longer valid and you want users to stop working on it immediately. If users are in the middle of the old curriculum, they must switch to the new curriculum, so you want to click *Deactivate and Unassign*. Those users who were in the middle of assignment profile no longer see any of the old curriculum assignments. You can then copy the assignment profile, and add the new curriculum.

Parent topic: Deactivating an Assignment Profile [page 396]

Related Information

Deactivating Assignment Profiles While Preserving Learning Assignments [page 397]

12.8 Copying an Assignment Profile

Copy an assignment profile when you have an existing assignment profile that groups users in a way that is close to a new grouping you want to create: the assignment profile you copy acts as a template for the new assignment profile.

Context

When you copy, the new assignment profile has the same attributes, curricula, competency profiles, plans, and items of the existing assignment profile. The new assignment profile doesn't have the same domains, catalogs, roles, ongoing performance review processes, or coupons of the existing assignment profile.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Find and open the assignment profile that you want to copy.
3. In *Actions*, choose *Copy*.

12.9 Deleting an Assignment Profile

Delete an assignment profile if you were developing it but it was never used. In most cases you want to inactivate assignment profiles not delete them.

Context

Deleting any record is typically reserved for development. For example, if you developed a number of assignment profiles, never ran them, and then realized during development that you didn't need them, you can safely delete them. But for something as central as learning assignment profiles, if it has run at least once, we recommend that you inactivate it instead of deleting it.

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.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Find and open the assignment profile that you want to delete.
3. In *Actions*, click *Delete*.

12.10 Checking the Assignment Profiles that Apply to a Learner

Learners' assignment profiles control how a user is assigned a number of other objects, so by understanding learners' assignment profiles, you can troubleshoot assignment issues.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*
2. Find and open the user who you want to investigate.
3. Click *Assignment Profiles*.

Results

You see the list of assignment profiles that apply to this user.

Next Steps

Look for missing or incorrect assignment profiles. To understand any of the assignment profiles in the list, click the title of the assignment profile.

Consider checking the direct assignments of the user in *Assigned Items*. A common assignment problem is an assignment profile that assigns a course (or a curriculum that includes the course) **and** that same course assigned directly. Sometimes you can remove a problem by removing the directly assigned item, but first check the progress of the user in the course.

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

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

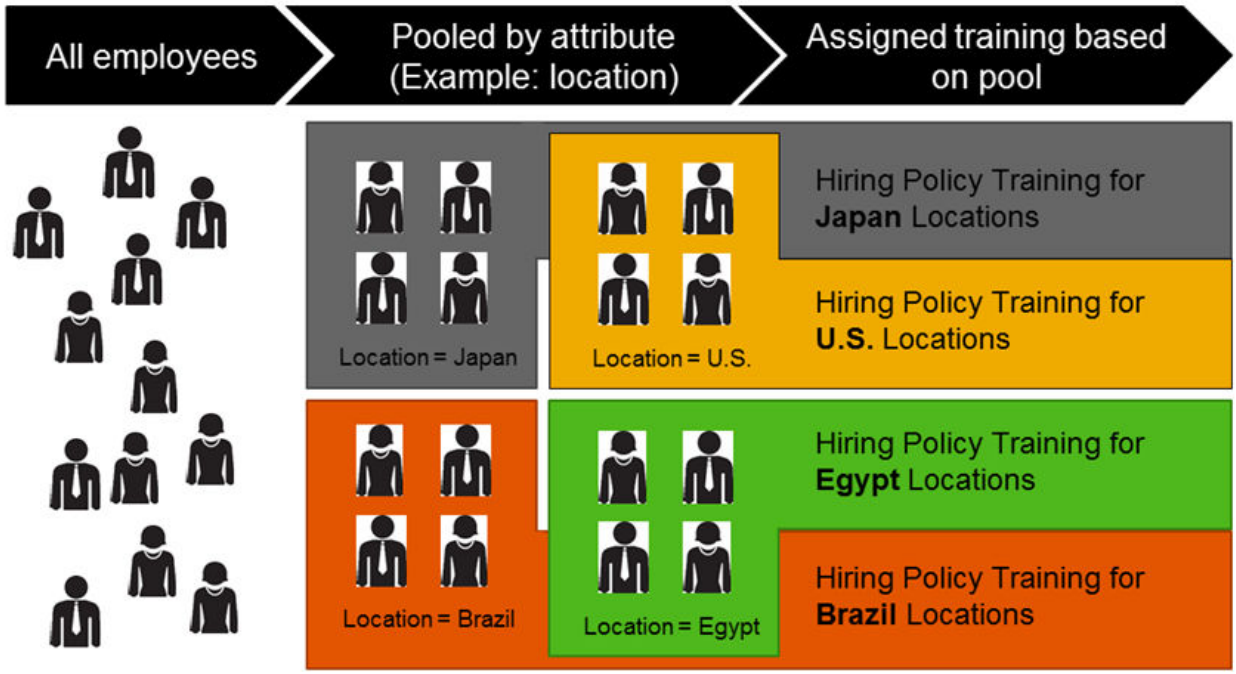
Status Value	Meaning
Valid	The assignment profile has been propagated so the object has been assigned to users.
Pending Addition	The system recognizes that you've added the object, but the assignment profile hasn't been propagated so users don't have the assignment.
Pending Deletion	The system recognizes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

12.12 SAP SuccessFactors Learning Assignment Profiles

In SAP SuccessFactors Learning, assignment profiles make assignments based on employee attributes.

Assignment profiles run a set of rules (like a `where` clause) to find users who match a profile. It pools those users so that you can make an assignment. For example, you can assign a library to the pool or you can assign specific courses or curricula to the pool. For example, you can design rules to look for all users whose location attribute is Japan and assign them the hiring policies training that aligns with Japanese employment law.

Assignment profiles run periodically, so the pools are constantly refreshed as users' attributes change. For example, if an individual employee's location changes from Brazil to Japan and then that employee's job title changes to manager, that employee can be added to the "job title equals manager" pool the next time the assignment profile runs.



Assignment Profile Example

12.13 Assignment Profile Pools

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

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

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

12.14 Learning Assignment Methods that do not Rely on Assignment Profiles

In SAP SuccessFactors Learning, most learning (courses, curricula) is assigned through assignment profiles, but there are alternate methods.

Assignment profiles make the majority of learning assignments, especially for required learning. There are, however, alternatives to using assignment profiles.

Automatic Assignment Methods

Most customers use assignment profiles for their automatic assignments. For example, if a group of users in California must complete a course, learning administrators can create an assignment profile to pool all users in California and automatically assign them the course.

You can also, however, use job codes to trigger a curriculum assignment. You set the users' job codes in SAP SuccessFactors Platform and they come into Learning, where you can see them in *References* > *People Management* > *Job Codes*. When you add a curriculum to *Curricula*, most learning (courses, curricula) is assigned through assignment profiles, but there, all users with the job code are assigned the learning in the curriculum.

Self and Peer Assignment Methods

Users or managers can assign courses to themselves or their direct reports. To assign themselves or their direct reports courses, however, they must engage with the learning system. Engagement comes in two forms: users can discover courses in their libraries and see recommendations. Recommendations can come from peers, from administrators, or from the Learning system.

- Users can assign themselves something from their learning library. For example, a team member might recommend a course to some colleagues. They see the course on their *Recommended* tiles and enroll into the course based on their coworker's recommendation.
- Managers can assign their direct reports something from the manager library. For example, managers might see a course that could benefit their direct reports and decide to directly assign the course.
- Learning can recommend courses based on users' interests and past completions.

Direct Single Assignment or Direct Bulk Assignment by Learning Administrators

You, as an administrator, can assign courses to users. As an administrator, the distinction among learning items, curricula, and programs is more important.

- You can run the user needs management wizard to assign learning items, curricula, or programs to users in bulk: *Manage User Learning* > *Manage Assignments*.
- You can import learning assignments that you make in an Excel spreadsheet: *System Administration* > *System Management Tools* > *Import Data*.
- As an administrator, you can assign learning items, curricula, or programs directly to user records: *People* > *Users*.

12.15 Adding Learning Employee Types

Add Learning employee types so that you can use them in assignment profiles rules to pool learners and assign them courses, curricula, and so on.

Context

Use employee type with assignment profiles to automatically assign courses to users based on their employee type. Employee type is a description, matched to your business, of how you categorize employees. For example: student intern, contractor, part time, full time, and so on. You often want to assign courses by these categories.

The values in Learning Administration *References* should always match those in SAP SuccessFactors Platform because Platform is the system of record. User Connector - SF adds most references that matter to Learning assignments.

Procedure

1. Go to Learning Administration, and then go to *References* > *People Management* > *Employee Types*.
2. Click *Add New*.
3. Add an ID and a description that fits the employee types that you want to use in assignment profile rules.
4. Click *Add*.

12.16 Why Avoid Learning Regular or Temporary Employee Metadata

Regular/Temp Employee is metadata that was used by Plateau Compensation or Plateau Performance for calculations. You can assign courses based on regular/temp employee status, but you should use employee type instead.

You can see the regular or temporary employee code in *References* > *People Management* > *Regular Temp*.

> → Tip
>
> Many customers don't want to import regular/temp employee metadata to Learning because they want to compartmentalize information. Learning administrators don't need to know employee regular or temporary status and you can use employee types to assign courses.

The *Regular / Temp ID* is a Learning attribute that is custom-built for the training planner. Few customers use training planner, so most customers can ignore it and instead use *Employee Type*. Employee types are more

common and they map to standard a standard Platform field (`EMPLOYEE-CLASS`). Ignore *Regular / Temp ID* if you do **not** use training planner.

13 Learning Collections: Lists of Hyperlinks

Learning collections help your company manage knowledge by allowing a single person to collect knowledge on a subject, manage it, and share it.

If you look at your employee's browser favorites or you look at their search history, you are likely to see that they collect links that teach them something useful for their jobs. They likely email those links to colleagues who are facing a similar knowledge gap or need a reference. Learning collections provide a way to formalize this practice.



The Collection Life Cycle

Any learner or administrator in your system can build a collection. Just like favorites in a browser, the cycle is the same, but collections bring it under management.

Collections [page 407]
A collection is a group of web sites that you want to recommend to users. Administrators control the collection with these settings.

Creating a Learning Collection as an Administrator [page 409]
As an administrator, recommend collections of links when you need a fast and informal way to push a set of web links to employees.

Enabling Learners to Create Collections [page 410]
Enable learners to create collections so that they can curate a list of links for themselves and recommend the list to colleagues.

Enabling Administrators to Create Collections [page 411]
Enable administrators to create collections when you want administrators to curate content for users.

Reporting on Learning Collection Views [page 413]
Report on how often users have viewed collections to give you a sense of their popularity with your employees.

Looking up Learning Collection Views [page 414]
If you are looking at a collection in the administration environment, you can quickly report on the views.

Enabling External Links [page 415]
Enable external links so that you can create external links in *Learning Activities* > *External Links*.

Adding an External Link [page 416]
Add external links (links that point to content that is outside SAP SuccessFactors Learning or its affiliated content network) when you want to recommend them and track users who clicked the links.

Pushing External Learning Links to Users [page 417]
Push external links (links that point to content that is outside SAP SuccessFactors Learning or its affiliated content network) when you see a useful link that you want to call users' attention to.

Tracking the Views of Recommended External Links [page 418]
Track the views of recommended external links to see who has been viewing the links.

SAP SuccessFactors Learning External Links [page 419]
External links provide a way for learning administrators to track and recommend links to users.

An Example of Using Collections [page 420]
When teams need to learn new things, and the learning content is available on the Web, collections offer everyone a way to rapidly and informally recommend the content to users.

13.1 Collections

A collection is a group of web sites that you want to recommend to users. Administrators control the collection with these settings.

You can create a collection by choosing *Add New* and add web sites to it.

Collection Fields

This Field...	...is Used as Follows
Title	The title of the collection, as users see it in their *Recommended* tile.
Description	Because the content of this field doesn't appear in the user interface or any reports, we recommend that you use the field to fully explain to other administrators the purpose for creating this entity.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
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.

Parent topic: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.2 Creating a Learning Collection as an Administrator

As an administrator, recommend collections of links when you need a fast and informal way to push a set of web links to employees.

Prerequisites

You can reuse external links from *Learning* > *External Links* in a collection of links, so consider creating external links before you create the collection. Using external links gives you a better accounting of which links are in which collections, and it gives you the opportunity to recommend links individually, outside of the collection. If a collection is not available in the user's catalog and you provide the direct link to that collection to the user, they will be able to access the collection.

Context

You often create collections when a business owner needs a way to quickly push knowledge to a set of employees but doesn't want to create formal learning. For example, your organization might want to recommend a recent set of talks by the leadership team about your culture.

> **Note**
>
> If enabled, users can also create collections and recommend them to colleagues.

Procedure

1. Go to *Learning Activities* > *Collections* and click *Add New*.
2. Add basic information about the collections and then click *Create*.

   When you first create the collection, do **not** set it to active. By keeping it inactive, you assure that users cannot see it until you are finished configuring it.
3. To add a new banner image to the collection, click the Menu button in the default banner.

   Add a banner to help orient users to the contents of the collection.
4. To search for and add a link from *Learning Activities* > *External Links*, click *Add Existing Link* in the placeholder.
5. To add a link that does **not** exist in *Learning Activities* > *External Links*, choose *Add a New Link*.

   If the title and description metadata are available at the URL, the placeholder scrapes the information into its title and description fields. You can also rewrite it so that your users see a different title and description.
6. To add an online content to the collection, choose *Add Online Item*.

7. When you are finished adding links, go to *Manage User Learning* > *Assignment Profiles*, create an assignment profile to group the users who should receive the recommendation, and then add the collections to *Recommendations*.

Task overview: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.3 Enabling Learners to Create Collections

Enable learners to create collections so that they can curate a list of links for themselves and recommend the list to colleagues.

Procedure

1. Log in to SAP SuccessFactors Learning and then go to *System Administration* > *Security* > *Role Management*.
2. Open the role that applies to the learners who you want to create collections.

   A learner is a security persona in SAP SuccessFactors Learning. Most companies use only one role for their learner persona.
3. Go to *Permissions* and then click *add one or more from list*.
4. Find the Author Collection permission and add it.

> ⓘ Note
>
> The permission might already exist in the role.

5. Click *Apply Changes*.

Next Steps

After you enable collections, you can manage the collections in the library.

Task overview: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Creating a Learning Collection as an Administrator [page 409]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.4 Enabling Administrators to Create Collections

Enable administrators to create collections when you want administrators to curate content for users.

Context

Collections allow your employees to curate online learning opportunities. You can allow your learners to create collections, you can allow your administrators to create collections, or you can allow both to create collections. Allow administrators to create collections if you want to curate content centrally.

Procedure

1. Go to Learning Administration and then go to *System Administration* > *Security* > *Roles*.
2. Find the administration role that should have the collections permissions applied.
3. Add these permissions:
   - Add Collection
   - Edit Collection
   - Search Collection
   - View Collection
   - Edit Assignment Profile if you want the role to use assignment profiles to recommend the collections to groups of users
   - View Assignment Profile Recommended Collections if you want the role to use assignment profiles to recommend the collections to groups of users
   - Recommend Collections if you want the role to directly recommend the collections to users
   - Add these external links permissions so that administrators can construct a collection from external links:
     - Search External Links
     - Add External Links
     - Edit External Links
4. Save the role and apply it to the administrators who should be enabled to create collections.

Next Steps

For more complex security options, read the SAP SuccessFactors Learning security guide.

Task overview: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.5 Reporting on Learning Collection Views

Report on how often users have viewed collections to give you a sense of their popularity with your employees.

Prerequisites

You need some collections to report on. You can either create the collections yourself or you can enable users to create collections.

Procedure

1. Log in to SAP SuccessFactors Learning administration and go to *Reports*.
2. In *Search*, type for **`Collection`**.
3. To run a report to see how often an entire collection has been viewed, click *Collection Views*.
4. To run a report to see how often individual links inside collections have been viewed, click *Collection Entry Views*.

   You can filter by the collections you want to investigate.
5. Run the reports.

Task overview: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.6 Looking up Learning Collection Views

If you are looking at a collection in the administration environment, you can quickly report on the views.

Context

Although you can report on the collection views in *Reports*, if you are working in a collection and want to know how often it has been viewed, you can glance at the views and launch the report directly from the *Learning Activities* > *Collections* page.

Procedure

1. Log in to SAP SuccessFactors Learning administration and go to *Learning Activities* > *Collections*.
2. Open your collection.
3. Find *Views* and look at the number that follows it.

   You see the number of times learners have viewed your collection.
4. Click *Views* to run the full report.

Task overview: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Enabling External Links [page 415]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.7 Enabling External Links

Enable external links so that you can create external links in *Learning Activities* > *External Links*.

Procedure

1. Go to *System Administration* > *Security* > *Roles* and open the role that you want to manage external links.
2. Assign the role the External Links permission.
3. Go to *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN* and open it.
4. Find `enableSmartLinks` and set it to **`true`**.

Task overview: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.8 Adding an External Link

Add external links (links that point to content that is outside SAP SuccessFactors Learning or its affiliated content network) when you want to recommend them and track users who clicked the links.

Context

You often see links that you think would be useful for your users to see. For example, you might see a YouTube video on sales techniques that you think your sales team would find useful. You can add the link as an external link and then recommend it to users so that they see it in their *Recommendations* tile.

Procedure

1. Open the external link in your browser.

   Use a deep link. For example, some web pages use a "copy link to clipboard" or similar mechanism to make sure that users are linked directly to their content. You can test your link by copying it, opening a new browser window, and pasting it in the URL box.

   > ⓘ Note
   >
   > The external link must be public and should preferably be HTTPS.

2. Copy the URL.
3. Go to SAP SuccessFactors Learning Administration, and then go to *Learning Activities* > *External Links* and click *Add New*.
4. Paste the URL you copied into *URL*.
5. Type a title and description that helps describe the link.

   The system attempts to scrape the title, description, and thumbnail from the web page at the URL. It adds thumbnails only if the URL is HTTPS.
6. Select a security domain and activate the link.

   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.

   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.
7. Complete the form and click *Add*.

Next Steps

After you add an external link, you can push it to users as a recommendation.

Task overview: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.9 Pushing External Learning Links to Users

Push external links (links that point to content that is outside SAP SuccessFactors Learning or its affiliated content network) when you see a useful link that you want to call users' attention to.

Prerequisites

You must have created at least one external link, you should configure the Recommendations Newsletter for your company before recommending links, and you should also have enabled the *Recommendations* tile for users.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Manage User Learning* > *Recommend External Links*.
2. In *Choose from the options below to Recommend and/or send notification*, decide how you want to push the link.

- Select *Recommend and Notify* to send the link in the users' recommendation newsletters, put it on their *Recommendations* tile, and send them an email notification about the link.
- Select *Recommend* to send the link in the recommendations newsletters and put it on users' *Recommendations* tile.
- Select *Send Reminder* to send users a reminder email, telling them that the link has been recommended to them. Use *Send Reminder*, for example, a week after you've recommended the link, to remind users again about the link.

3. In *Search & Add External Links*, find the links that you want to push to users and add them to the list of external links.
4. In *Search & Add Users*, find the users who you want to push the links to and add them to the list of users.
5. Click *Next* to review the information.
6. Choose *Schedule Job* to run this job.

Task overview: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Adding an External Link [page 416]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.10 Tracking the Views of Recommended External Links

Track the views of recommended external links to see who has been viewing the links.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Learning Activities* > *External Links*, search for your link, and open it.
2. On the page, find *Views*.

In *Views*, you see the number of people who have viewed it out of the number who you recommended it to. For example, if you recommended it to 10 people, and 2 people have viewed it, you see 2/10.

3. To download a spreadsheet report of who as viewed the link, click *View Report*.

Task overview: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
SAP SuccessFactors Learning External Links [page 419]
An Example of Using Collections [page 420]

13.11 SAP SuccessFactors Learning External Links

External links provide a way for learning administrators to track and recommend links to users.

Use external links when you see content on the internet and want to recommend the content to users. The links can appear in users' *Recommended* tile and you can track how many of the users have viewed the link.

For example, if you see a helpful video on YouTube and you want to recommend the video to users, you can create an external link to the content. You create the link so that it can be tracked in the system and then you recommend the link that you created to users.

- You create the link in *Learning Activities* > *External Links*.
- You recommend the link in *Manage User Learning* > *Recommend External Links*.

You can customize thumbnail images for external links. The default thumbnail image can be customized in *System Administration* > *Application Administration* > *Images*. The thumbnail image for a particular link can be customized to be included in the recommendation tile only.

User notification emails now include prepopulated thumbnail images for external links. For example, an image is prepopulated from an external link and is accessible via the Internet. Customized images aren't included in email notifications.

Users can bookmark external links from the *Recommendation* tile.

The *Notify* button has been renamed to *Send Reminder* and is enhanced to prepopulate users who have been recommended to the link but haven't viewed it.

To make the best use out of external links, we recommend that you:

- Enable the *Recommended* tile in *System Administration* > *Application Administration* > *Landing Page Settings*.
- Configure the recommendations newsletter in *System Administration* > *Automatic Processes*.
- Use collections in *Learning Activities* > *Collections* to group your links.

Parent topic: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]
Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
An Example of Using Collections [page 420]

13.12 An Example of Using Collections

When teams need to learn new things, and the learning content is available on the Web, collections offer everyone a way to rapidly and informally recommend the content to users.

Imagine that you have a team of Web designers who are good designers but have been working on legacy code. As a manager or as an administrator, you've decided to transition them to a team that is using HTML5. Before they begin, you want them to read up on HTML5, and there are plenty of online tutorials and articles.

The team members **could** find the HTML5 links on their own, but the links might not be exactly what you want. The links might have more generic HTML5 training, or they might offer advice that doesn't fit how you want to implement HTML5. With collections, you can target the content to the team's needs: you can send them the links that are most useful for your situation. Furthermore, you can pace their learning by offering two collections: one for basic HTML5 and one for more advanced HTML5.

Creating a New Collection

The first step in this example is to create a new collection. Your system can be configured to allow different groups to create collections: user groups, administrator groups, or both. After you have permission, you create a collection and give it a name like HTML5 Basics or HTML5 Advanced.

Adding Links to Collections

After you create the collections, add links to it. For example, a popular place to start learning basics about HTML5 is w3schools.com. If you paste **`http://www.w3schools.com/html/`** into the collection, the title and description auto-populate from the URL. You continue to add useful links to the collection.

If you're an administrator, you can add external links to the collection. This allows you to draw on any external links you might have already created in *Learning Activities* > *External Links*.

Recommending Collections

After build your collections, you want to recommend them to the team of designers who need to know more about HTML5. You want them to show up on the users' *Recommended* tile. Administrators and users have different ways of recommending collections.

Administrators go to *Manage User Learning* > *Assignment Profiles* and create a new assignment profile that pools the team members together by their attributes. Then, they go to *Recommended collections* and add the basic and advanced HTML5 collections.

Users, however, simply *Recommend* in the menu and then select users for the recommendation.

Publishing Collections into Libraries

By recommending collections, you push them to users, but you can also allow users to pull the collections from their libraries. You might want to push the HTML5 collection to users who you know are using HTML5 but allow other employees to find the HTML5 collection in a search.

Administrators go to *Learning Activities* > *Libraries* > *Collections* to add the collection to a library. Users go to the menu and click *Publish*.

Parent topic: Learning Collections: Lists of Hyperlinks [page 406]

Related Information

Collections [page 407]

Creating a Learning Collection as an Administrator [page 409]
Enabling Learners to Create Collections [page 410]
Enabling Administrators to Create Collections [page 411]
Reporting on Learning Collection Views [page 413]
Looking up Learning Collection Views [page 414]
Enabling External Links [page 415]
Adding an External Link [page 416]
Pushing External Learning Links to Users [page 417]
Tracking the Views of Recommended External Links [page 418]
SAP SuccessFactors Learning External Links [page 419]

14 Learning Needs Management Tools

We provide a set of tools to make it easy to manage learning needs.

Learning > *Tools* provides a set of easy-to-use wizards for the common tasks in its section. For example, tools in the learning section cover the closing and canceling of classes, the scheduling of curricula, or sending notifications about classes, and so on. The tools in the user management section deal with recording or editing learning events for users, merging multiple records for a single user, user needs management, and so on. The grouping of the tools by section may not always perfectly suit your needs. Therefore, if you cannot locate a tool in the specific section, please look at other sections. Wizards make complex tasks simple. Some of these wizards span multiple sections, which mean that they could bring records from the User Management, Learning, or Performance sections into one place and in a workflow that allows you to complete complex tasks.

14.1 Registration Assistant

View this section if you want to use a wizard to register users, withdraw users, or reserve seats for a class.

In *People* > *Users* > *Actions* > *Manage Registration*, you can use the Registration Assistant wizard to register users in, withdraw users from, and reserve seats for a class.

14.1.1 Withdrawing Users from a Class with Registration Assistant

View this section if you want to withdraw users from a class using the registration assistant.

Procedure

1. Go to *People* > *Users* > *Actions* > *Manage Registration*.
2. In the dialog, select *Withdraw Users*. Choose *Next*.
3. Enter the Class ID or search for the desired class using the (Search) icon. Choose *Next*.
4. Select the *Withdraw* checkbox next to each user who you want to remove from the class. You can withdraw any user, regardless of registration status. Choose *Next* to continue.
5. Review the information in the Record Withdraw dialog. You may also select the *Users*, *Instructors*, *Managers*, and *Contacts* checkboxes if you wish to notify a group that you withdrew them or others from the class. If you select the *Remove associated item from the learning plan* checkbox, you will remove the class from the withdraw user's learning plan.

> **Note**
>
> Add users, instructors, managers, and others as class contacts on the class *Contacts* tab (*Learning Activities* > *Classes* > *Contacts*). Then, you can configure and edit the registration email notifications on the class *Email Notifications* tab.

6. If all of the information is correct, choose *Finish* to record the withdrawal.

14.1.2 Reserving Seats in a Class with Registration Assistant

View this section to reserve seats in a class using the registration assistant.

Prerequisites

If you are reserving seats for user groups, please start here: Placing Users into User Groups [page 643]

Procedure

1. Go to *People* > *Users* > *Actions* > *Manage Registration*.
2. In the dialog, select *Reserved Seats*. Choose *Next*.
3. Select your desired registration type, *Organization Reserved Seats* or *User Group Reserved Seats*.
4. Enter the Class ID or search for the desired class using the (Search) icon. Choose *Next*.
5. Enter or search for the Organization ID or User Group ID. Enter the number of seats you would like to reserve in the *Reserved Seats* field (required). If needed, you may also edit the registration date, time, and time zone. When you are done, choose *Add* to add the organization or user group to the list. Repeat this step as needed. When you are done, choose *Apply Changes*, then choose *Next*.

   > **Note**
   >
   > Seats can also be used for User Groups if the pool of users for a reservation aren't in the same organization.

6. In the Edit Comments dialog, you can enter comments for each organization or user group as needed. When you are done, choose *Next*.

   > **Note**
   >
   > You can view or edit user comments in *Learning Activities* > *Classes* > *Registrations* (tab).

7. In the Edit Financial Data dialog, you can enter financial information, including chargeback accounts, price, and currency. Choose *Next* when you are done.

> **Note**
>
> You can't enter chargeback accounts and prices for organizations that don't have shopping accounts.

8. Review the information in the Record Registration dialog. If all of the information is correct, choose *Finish* to record the seat reservations.

Next Steps

- After you reserve seats for the class, you can edit or remove their registrations on the class entity (*Learning Activities* > *Classes* > *Registrations*).
- You can use the *EnrollmentSlotConfirmation* notification template (*System Administration* > *Manage Email* > *Email Notification Templates*) to customize the message that the organization email recipient receives after you or another administrator reserves seats in a class.

Related Information

User Groups [page 642]
SAP SuccessFactors Learning Organization Reserved Seats [page 641]

14.1.2.1 Seat Reservations Fields

View this section if you want to know about *Seat Reservations* fields in a class.

This Field...	...Is used as follows
Chargeback Account	If the organization has a default chargeback account code (*People* > *Organizations* > *Account Code*), then the system automatically enters that code into the *Chargeback Account* field. If not, you can choose *Edit* to add one or more account codes to the record and then adjust the percentage values in the *Distribution* column so that the system correctly charges each account. Because you can't create new account codes as you go through the registration assistant, you must select account codes that already exist in the system (*References* > *Finance* > *Account Codes*).

This Field...	...Is used as follows
Price Per Reserved Seat	The value in the *Price* field reflects the cost of the reserved seats for each organization. For example, if you reserve 200 seats for Organization A and the value in the *Price* field is $50.00 (USD), then the cost of the registration is $10,000.00 (USD). If you include a non-zero numeric value in the *Price* field, then you must also provide one or more chargeback account codes in the *Chargeback Account* field.
Currency	When you select a currency ID, the default price doesn't change; therefore, you should proceed cautiously when changing the currency ID because you could make the class more or less expensive. If you change this value for some reason and complete the wizard, then the system creates a new financial record that an administrator can track (*Finance* > *Financial Transaction*).

14.1.3 Registering Users in a Class with Registration Assistant

View this section if you want to register users in a class with the registration assistant.

Prerequisites

If you want to charge the event to an voucher number for any user, then we recommend that you gather each user's voucher number **before** you begin the Registration Assistant wizard.

Procedure

1. Go to *People* > *Users* > *Actions* > *Manage Registration* .
2. In the dialog, select *Register Users*. Choose *Next*.
3. Enter the Class ID or search for the desired class using the (Search) icon. Choose *Next*.
4. You can enroll one or more users in the class by entering each user's ID manually then choosing *Add*, or by choosing *add one or more from list*. If needed, you may also edit the user's registration status, reservation date, time, and time zone before proceeding to the next step. When you are done adding users to the list, choose *Apply Changes*, then choose *Next*.
5. In the Edit Assignment dialog, you can enter comments for each users as needed. When you are done, choose *Next*.

6. In the Edit Financial Data dialog, you can enter financial information for the organization, including voucher numbers, chargeback accounts, price, and currency. Choose *Next* to continue.

   > **Note**
   >
   > You can't enter chargeback accounts and prices for organizations that don't have shopping accounts.

7. Review the information in the Record Registration dialog. You may also select the *Users*, *Instructors*, *Managers*, and *Contacts* checkboxes if you wish to notify a group that you registered them or others for the class.

   > **Note**
   >
   > Add users, instructors, managers, and others as class contacts on the class *Contacts* tab (*Learning Activities* > *Classes* > *Contacts*). Then, you can configure and edit the registration email notifications on the class *Email Notifications* tab.

8. If all of the information is correct, choose *Finish* to record the registration.

Next Steps

After you register users for the class, you can edit or remove their registrations on the class entity (*Learning Activities* > *Classes* > *Registrations*).

14.1.3.1 Seat Reservations Fields

This topic contains descriptions of the fields on the *Seat Reservations* tab for a class.

This Field...	...Is used as follows
Reservation ID	Reserved seats are available seats in a class that you can reserve for an organization. When you select a reservation ID, the users that you registered fill the available reserved seats. You can add more reserved seats on the *Registrations* tab of the class (*Learning Activities* > *Classes* > *Seat Registrations*). To use the *Reservation ID* field, you must clear the *Price*, *Chargeback Account*, and *Voucher* fields.

This Field...	...Is used as follows
Chargeback Account	If the organization has a default chargeback account code (*People* > *Organizations* > *Account Code* tab), then the system automatically enters that code into the *Chargeback Account* field. If not, you can choose *Edit* to add one or more account codes to the record and then adjust the percentage values in the *Distribution* column so that the system correctly charges each account. Because you can't create new account codes as you go through the registration assistant, you must select account codes that already exist in the system (*References* > *Finance*).
Voucher	If the user hasn't yet paid for the event, then you can enter a voucher number into the *Voucher* field that the system uses to pay for the event. To use the *Voucher* field, you must clear the *Reservation ID*, *Price*, *Chargeback Account* fields.
Price	The value in the *Price* field reflects the cost of the reserved seats for each organization. For example, if you reserve 200 seats for Organization A and the value in the *Price* field is $50.00 (USD), then the cost of the registration is $10,000.00 (USD). If you include a non-zero numeric value in the *Price* field, then you must also provide one or more chargeback account codes in the *Chargeback Account* field.
Price Per Reserved Seat	The value in the *Price* field reflects the cost of the reserved seats for each organization. For example, if you reserve 200 seats for Organization A and the value in the *Price* field is $50.00 (USD), then the cost of the registration is $10,000.00 (USD). If you include a non-zero numeric value in the *Price* field, then you must also provide one or more chargeback account codes in the *Chargeback Account* field.
Currency	When you select a currency ID, the default price doesn't change; therefore, you should proceed cautiously when changing the currency ID because you could make the class more or less expensive. If you change this value for some reason and complete the wizard, then the system creates a new financial record that an administrator can track (*Finance* > *Financial Transactions*).

Related Information

Adding Learners to Class Registration Lists [page 222]

14.2 Edit Required Dates

View this section if you want to use a wizard to set new required dates by which users must complete all curriculum items or items not in a curriculum or program.

In *Manage Users Learning* > *Edit Required Dates*, you can use the Edit Required Dates wizard to set new required dates by which the users you select must complete all items in a curriculum or items not in a curriculum or program.

Step	Purpose
Step 1: Add Users	You must add users for whom you want to edit the required dates of curriculum items or items not in a curriculum or program. If you want to add multiple users, then we recommend that you click *add one or more from list* to locate and select multiple user IDs.
Step 2: Add Curricula	You can add one or more curricula in step 2 and then click *Next* to add items not in a curriculum or program in step 3 or skip step 2 entirely if you want to add **only** items not in a curriculum or program in step 3.
Step 3: Add Items not in a Curriculum or Program	You can add one or more items that aren't in a curriculum or program by selecting an item type and entering an item ID or by clicking *add one or more from list*.
Step 4: Edit Item Required Date	You can enter new required dates for each item or click the *Select Date* button to automatically populate the *Required Date* box for each item. After entering new required dates for each item, you must click *Finish* to record the new dates for the users you selected in step 1.

You can edit the required date that you set for each item on the *Assigned Items* tab of a user's entity (*People* > *Users* > *Assigned Items*).

14.3 External Links

Administrators set up external links when they want to track online content that is outside the learning management system.

14.4 Activating and Deactivating Open Content Network Learning Items

You can activate and deactivate Open Content Network (OCN) learning items in bulk to hide or show them in users' libraries.

Prerequisites

- You must have the*Activate/Deactivate Learning Content Network* permission in your role.
- To view disabled Open Content Providers with active items from *Open Content Network Deactivation*, the `providers[<specific provider name>].enabled` property for each provider must be set to **`false`**.
- To view inactive Open Content Providers from *Open Content Network Item Reactivation*, the `providers[<specific provider name>].enabled` property for each provider must have been disabled at one time, and then changed the property to **`true`**.

Context

Open Content Network (OCN) allows you to create learning items that link from SAP SuccessFactors Learning to an OCN provider. An OCN provider is a vendor of online content. The OCN provider hosts the online learning content. The learning items in SAP SuccessFactors Learning link to the hosted content.

Because the content remains on the OCN provider site, you might want to disable access to one provider's content. For example, if you decide not to renew a contract with a provider but think you might renew it in the future, you can disable the providers' learning items to hide them throughout the system without deleting them.

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.

Procedure

1. Go to *Content* > *Activate/Deactivate OCN Courses*.

   You see a list of providers that have learning items in your system and you see them in two different lists:
   - *Open Content Network Deactivation* contains providers that have active content that you can deactivate in bulk.
   - *Open Content Network Item Reactivation* contains providers that were active at one time, that you deactivated in bulk, and that you can reactivate.

2. To inactivate or deactivate a provider's learning items, select the provider from the list and then click *Apply Changes*.
3. Review the list of courses that will be changed and then click *Continue*.

   Activation and deactivation are large jobs so it's likely that you need to run a background job. Follow the instructions on the screen to run a background job.

15 Adding Tasks, Objectives, Requirements, Competencies

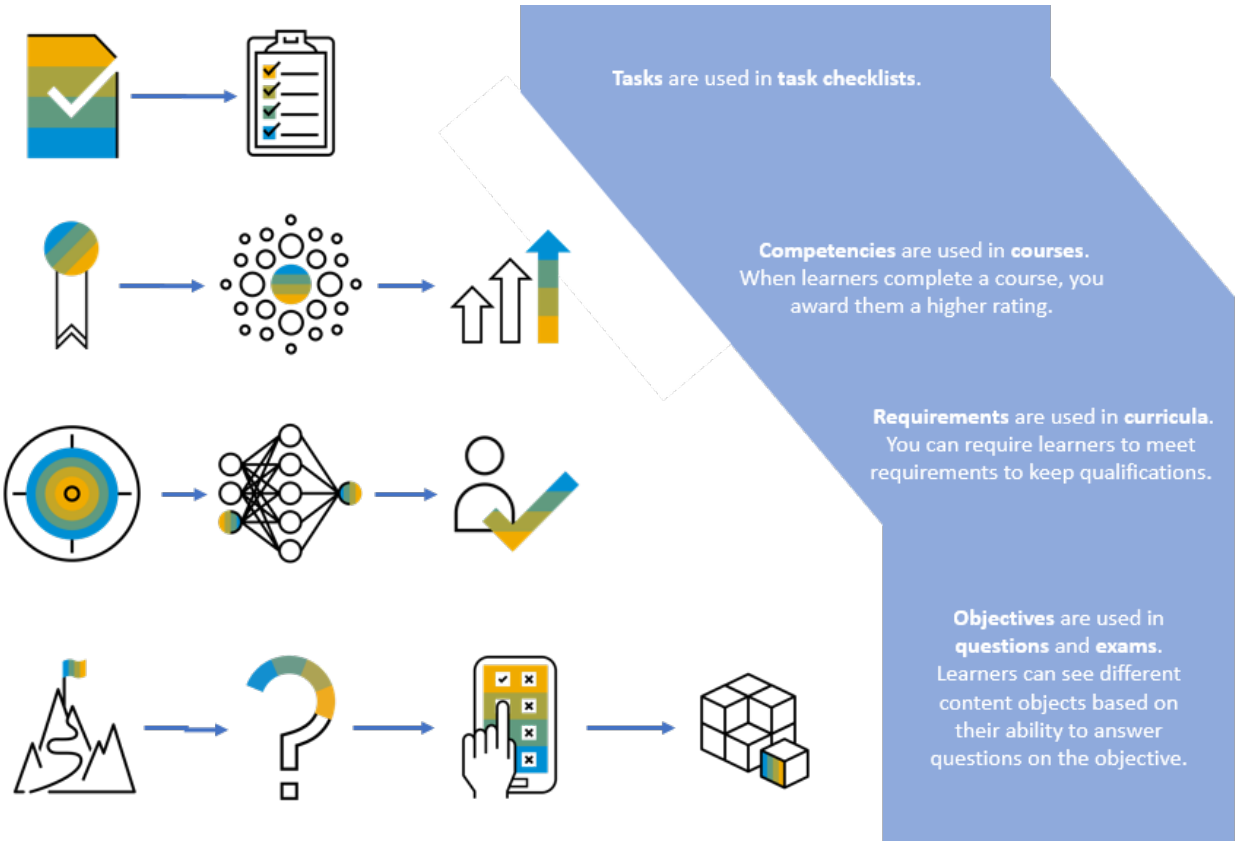
Before you create courses, curricula, and programs, consider how you want to use instructional design elements to support learning needs management.

Instructional design support means defining the tasks, objectives, and requirements of learning opportunities before you begin learning needs management. Your instructional design support and process can differ from other customers, but you often know the tasks, objectives, and requirements and you can add them to SAP SuccessFactors.

- When you define learning objectives, you can understand what you want learners to know.
- When you define learning tasks, you can understand what you want learners to do.
- When you define requirements, you can see what learners must do to remain qualified.

In SAP SuccessFactors, we track objectives, tasks, and requirements, but we also use them create rules and behavior in the system. You can find some value in adding instructional design support for its own sake, but if you do not have time or an instructional design practice, you can skip them if you understand how they are used.

> **Note**
>
> Do **not** create competencies in Learning. Instead, create them in Job Profile Builder and import them to Learning.



Instructional Design Objects

15.1 Adding Learning Objectives

Add learning objectives to identify what you want users to learn and to measure their mastery of that subject.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Objectives*.
2. In *Name*, type a name for the objective that describes the objective.

   For example, if you want users to demonstrate business ethics, type **`Business Ethics`**.
3. In *Description* type a more complete description of a positive outcome.

   For example, if a positive outcome of the objective is that users recognize conflicts of interest, then you can type **`Users will be able to identify conflicts of interest in their business dealings.`**
4. Clear *Online*.

   Although *Online* should be clear by default, verify that it is **not** selected. Keep the objective offline until you are ready to use it in other parts of SAP SuccessFactors Learning.
5. Click *Add*.

15.1.1 Learning Objective Summary Fields

The summary fields of learning objectives contain basic information about the objective.

This Field...	...Is used as follows
Objective Name	Create an objective name that identifies what the user should be able to do when they complete the objective.
Description	Because the content of this box appears in the user interface and in reports, we recommend that you enter a description that helps users identify the record or its purpose.
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.
Active	When you make a record inactive, the system does not include that record in any searches or reports by default; however, some searches and reports allow you to override the default so that you can include inactive records. You might make a record inactive (rather than delete it) if you no longer want to use it but keep it for a historical record. Because you cannot restore a deleted record, we recommend that you delete a record only when you make a mistake in some way (for example, if the record ID is simply incorrect).
Online	When you select *Online*, users can access content objects, exams, and surveys that incorporate this objective. If you do not select the box, users are locked out of any online material that incorporates the objective. If an objective's related content is flawed or misleading, then you can prevent users from being exposed to it until it can be corrected. When you select and clear this box and attempt to save the change, the system checks to see if there are any items, exams, content objects, and/or questions that reference this objective and also have the online status that is the opposite of what you indicated for the objective's online status. If any conflicting records are found, the system executes the Objective Availability Resolution Assistant.

15.1.2 Using an Existing Learning Objective as a Template for new Objectives

Use an existing learning objective as a template for new objectives when you want to reuse content from the existing objective.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Objectives*.
2. Find and open the competency that you want to use as a template.
3. Click *Copy Objective*.
4. In *Objective Name*, type a new name for the objective.
5. To copy the competencies associated with this objective, select *Copy competency associations*.

   You automatically copy information from *Summary*, *Custom Fields*, *Obj. Display Text*, and the *Questions* tabs to the new objective.
6. Click *Copy*.

Next Steps

When you first copy an objective, it shares almost all of its information with the template. Edit the new objective to make it unique.

15.1.3 Viewing the Content Objects That Address a Learning Objective

If you're troubleshooting content and you want to look up the content objects that address one learning objective, you can go to the objective and look up its content objects.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Objectives*.
2. Find and open the learning objective that you want to investigate, and then open it.
3. Go to *Object Usage*.

Next Steps

If you need to change the associations, go to the content object that is wrong and change its objectives. Go to *Content* > *Content Objects*, open the incorrect content object, and then go to *Objectives*.

15.1.4 Storing Custom Data in a Learning Objective

Store custom data in a learning objective when our data model doesn't include data that you want to report on.

Prerequisites

Before you can store custom data in a learning objective, you declare the data that you want to store. In most cases, you do this during implementation and revisit the design periodically. If you don't see a field for your data, go to *System Administration* > *Custom Fields* > *Objective* and add the field.

Context

Many organizations need additional data when reporting on learning objectives. For example, you want to add a flag that indicates that the objective is for certification or you want to add an originating organization for the objective. When our data model doesn't include fields that you need, you add the fields during implementation and then populate the fields with data during your administration cycle.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Objectives*.
2. Find and open the objective that needs custom data.
3. Go to *Custom Fields*.

15.1.5 Adding Attributes to Objectives

Add attribute types of competency and skill to objectives so that when users meet the objective, they get credit for the attributes.

Prerequisites

- For users who have enabled Talent Intelligence Hub, ensure you've migrated attributes.
- For users who have enabled Job Profile Builder, ensure you've imported competencies from Job Profile Builder.
- For users who have enabled Job Description Manager, ensure you've imported competencies from Job Description Manager.
- Before SAP SuccessFactors Learning can trigger an attribute completion based on completing a learning objective, you must create a mechanism for marking the objective complete. If you are using objectives to mark attributes complete, then chances are that you want to use an exam to test users. If users pass the questions associated with an objective, then they are marked complete in the objective.

Context

You can set up a system that grants attribute credit to users for achieving a learning objective. For example, if users are assigned an attribute that requires them to identify conflicts of interest, you can allow them to meet that attribute by successfully meeting a learning objective about identifying conflicts of interest.

> **Note**
>
> While Talent Intelligence Hub users can add attributes of type competency and skill, Job Description Manager and Job Profile Builder users can find and add **only** competencies to objectives.

Procedure

1. Go to *Learning Administration* > *Content* > *Objectives*.
2. Search and edit an objective.
3. Go to the *Attributes* tab.
4. If you want to add attributes directly using their ID, perform the following steps. Otherwise, skip this step.
   a. Enter an attribute ID. You can't enter more than one ID in the field.

      > **Note**
      >
      > Job Description Manager or Job Profile Builder users enter a competency ID in the field.

   b. Choose *Add*.

      Repeat the steps if you want to add additional attributes to the objective.

5. If you want to add multiple attributes, perform the following steps.
    a. Choose *add one or more from list*.
    b. Search and find the attributes that you to associate.
    c. Select one or more attributes and choose *Add*.

Results

The attributes are listed in the update section. You can also remove associated attributes from the objective if necessary. From the list, select the *Remove* checkbox for the attributes that you want to remove and then choose *Apply Changes*.

Related Information

Scheduling Capabilities Synchronization Process [page 1261]
Scheduling Attributes Synchronization Process [page 1261]
Migration of Learning Competencies to Center of Capabilities [page 1356]

15.1.6 Viewing the Learning Items that Use a Learning Objective

View the learning items that use an objective when you know the objective and, for troubleshooting, you want to look at all learning items that use it.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Objectives*.
2. Find and open the learning objective that you want to investigate, and then open it.
3. Go to *Items*.

Next Steps

To modify the relationship between a learning item and its objective, go to *Learning Activities* > *Items*, open the learning item, and then go to *Objectives*.

15.1.7 Viewing the Objective as it is Displayed at Run Time

View the display text of an objective when you want to see how it is represented at run time.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Objectives*.
2. Find and open the learning objective that you want to investigate, and then open it.
3. Go to *Objective Display Text*.

Next Steps

If you want to edit the text, click *Summary*.

15.1.8 Viewing the Questions that Test an Objective

If you are troubleshooting an exam, and you want to look up the questions that test a learning objective, you can go to the objective and look up its questions.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Objectives*.
2. Find and open the learning objective that you want to investigate, and then open it.
3. Go to *Questions*.
4. Expand any question to investigate the individual question.

15.1.9 Learning Objectives

A learning objective defines what users should be able to do or understand by the end of the learning session.

A clearly defined objective explains the goal of a particular assignment. It also serves as a guide for planning assignments and assessments. When you create objectives, you're able to tie a learning outcome to assessments and competencies.

For example, you can create the following objective: learners can identify and describe conflicts of interest and how they harm our organization. When designing courses, you can connect them to the objective. You can report on

all courses that meet an objective or you can report on all objectives that a course addresses. When users enroll into the course, they can be expected to meet the objective by the end of course, so you can create exams that assess the objective. You connect questions in the exam to the objective. The exam draws from a pool of questions to test that the user has internalized the objective. Finally, when you connect objectives to competencies, when the user finishes the course and when the user successfully passes the objective's questions in the exam, the user can receive credit for the competency.

You manage objectives in SAP SuccessFactors Learning by going to *Content* > *Objectives*.

15.1.10 Exam Usage Tab

View this section if you want information for each offering of all the users' attempts at exams that incorporate an objective as well as the corresponding performance data.

Content > *Objectives* > *Exam Usage* is a view-only tab which shows you the list of exam and survey objects that incorporate an objective (View Exam Objects).

Field	Description
Exam ID	The ID of the exam that uses the objective.
Exam Title	The Title of the exam that uses the objective.
Is Active	Indicates whether the exam or surveyobject is currently active.

15.1.11 Exam Usage (Legacy) Tab

View this section if you want information for each offering of all the users' attempts at exams that incorporate an objective as well as the corresponding performance data.

Content > *Objectives* > *Exam Usage* is a view-only tab which shows you the list of exam and survey objects that incorporate an objective (View Exam Objects), and a row of information for each offering of all users' attempts at exams that incorporate the objective, along with performance data and statistics pertaining to the use of the objective in the highlighted exam (View User Exams object). See Exam and Survey Objects.

Field	Description
Exam	The ID of the exam that uses the objective.
Is active	Indicates whether the exam or surveyobject is currently active.
User ID	Key value of the user's database record.
Iteration	A sequential number, starting at 1, assigned to each successive user attempt at this objective. If a user repeats the attempt, you can compare his or her performance on the first attempt to the second attempt.
Pass Grade	The grade given for passing the exam.
Questions Asked	The total number of questions asked.

Field	Description
Questions Answered	Of the number of questions asked, the number of questions for which the user provided an answer, whether correct or incorrect.
Questions Correct	Of the number of questions asked, the number of times the user provided the correct answer.
Points Per Objective	The total number of points possible for the selected objective.
Score	The total number of points that the user has scored on this objective.

15.2 Adding Requirements

Add requirements to allow users to choose which learning items they want to complete to complete a curriculum assignment.

Prerequisites

Before you create a new requirement, check to see if you have a requirement that you can use as a template: one that is close to the requirement that you want to create. If you can find a requirement that you can use as a template, open it and click *Copy*.

The rules of a requirement are controlled by its type. Before you create a requirement, familiarize yourself with the different types so that you create rules that work for your business need.

Context

Requirements give users a chance to choose how they fulfill a curriculum assignment. You can design a requirement, for example, that allows users to choose from one of three learning items. Users can choose any of the three, and as long as they successfully complete one of them, the curriculum considers the assignment met.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curriculum Requirements*.
2. Click *Add New*.
3. In *Requirement Type*, select what kind of choice you want to give users.
    - *Number of Hours of Specified Hour Type*: This requires users to complete a number of hours to fulfill the requirement and those hours must be of a certain type (for example, contact hours or credit hours). Users can select any learning item in the curriculum to fulfill their required hours.

- *Number of Hours of Specified Hour Type from Pool of Items*: This requires users to complete a number of hours to fulfill the requirement, those hours must be of a certain type (for example, contact hours or credit hours), and the hours must come from a subset of learning items in the curriculum (as opposed to any learning item in the curriculum).
- *Number of Items from Pool of Items*: This requires users to select a number of items from the pool of learning items.

4. Complete the other fields.
5. Click *Next*

Next Steps

Depending on your choice in *Requirement Type*, you configure the details of the requirement.

Related Information

Using Requirement Groups [page 284]
Requirement Groups [page 285]
Creating a Requirement Group [page 283]
Adding Content to Curricula [page 281]

15.2.1 Allowing Users to Fulfill a Requirement with Hours from Any Learning Item in a Curriculum

Allow users to fulfill a requirement with hours from any learning item in the curriculum when you want to hold users to a number of educational hours, but you want them to choose those hours from any learning item (course) in the curriculum.

Prerequisites

Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curriculum Requirements*. Create a requirement of type *Number of Hours of Specified Hour Type*. After you create it and click *Next*, you configure the requirement by its type.

Procedure

1. In *Hour Type*, select the type of hours that you want users to draw from.

   - Most customers do not record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use credit hours. Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. universities, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equals 45; however, the college grants 3 **credit hours** for this class.
   - CPE is an abbreviation for Continuing Professional Education and refers to learning activities that users perform to maintain and expand the skills that their profession demands. Some customers in some industries use CPE hours for certification. If you are in an industry that uses CPE hours for certification, please use the *CPE Hours* field instead of credit hours or contact hours. If you are not in an industry that uses hours to certify employees, you can ignore CPE hours.
   - Most customers don't record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use contact hours. Contact hours are the total number of hours that you expect a user to have contact with an instructor. For example, if you set up a learning item that is instructor-led with online content for 8 total hours and, for 6 of those hours, you expect the user to be in an instructor-led time slot, then the contact hours equals 6.
   - Total hours specifies that the hours can come from any type.

   The hours can be inherited from the learning event (the course) or they can be specified when a user, manager, or administrator records completion with the Add Learning History wizard.
2. In *Required Hours* type the number of hours that a user must accumulate to meet the requirement.
3. Click *Add*.

Next Steps

If you need to change the type or the details of the type, you can change it in *Configuration* on the requirement (*Learning Activities* > *Curriculum Requirements*).

Add the requirement to a curriculum. Within the curriculum, you can add multiple requirements to create an AND connection between the requirements. You can also create requirement groups to create an OR relationship between the requirements.

Related Information

Using Requirement Groups [page 284]
Requirement Groups [page 285]
Creating a Requirement Group [page 283]
Adding Content to Curricula [page 281]

15.2.2 Allowing Users to Fulfill a Requirement with Hours from a Subset of Learning Items in a Curriculum

Allow users to fulfill a requirement with hours from a subset of learning items in the curriculum when you want to hold users to a number of educational hours, and you want them to choose those hours from a subset of the learning items (courses) in the curriculum.

Prerequisites

Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curriculum Requirements*. Create a requirement of type *Number of Hours of Specified Hour Type from Pool of Items*. After you create it and click *Next*, you configure the requirement by its type.

Procedure

1. In *Hour Type*, select the type of hours that you want users to draw from.
   - Most customers do not record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use credit hours. Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. universities, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equals 45; however, the college grants 3 **credit hours** for this class.
   - CPE is an abbreviation for Continuing Professional Education and refers to learning activities that users perform to maintain and expand the skills that their profession demands. Some customers in some industries use CPE hours for certification. If you are in an industry that uses CPE hours for certification, please use the *CPE Hours* field instead of credit hours or contact hours. If you are not in an industry that uses hours to certify employees, you can ignore CPE hours.
   - Most customers don't record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use contact hours. Contact hours are the total number of hours that you expect a user to have contact with an instructor. For example, if you set up a learning item that is instructor-led with online content for 8 total hours and, for 6 of those hours, you expect the user to be in an instructor-led time slot, then the contact hours equals 6.
   - Total hours specifies that the hours can come from any type.

   The hours can be inherited from the learning event (the course) or they can be specified when a user, manager, or administrator records completion with the Add Learning History wizard.
2. In *Required Hours* type the number of hours that a user must accumulate to meet the requirement.
3. Click *Add*.

Next Steps

If you need to change the type or the details of the type, you can change it in *Configuration* on the requirement (*Learning Activities* > *Curriculum Requirements*).

Add the requirement to a curriculum. Within the curriculum, you can add multiple requirements to create an AND connection between the requirements. You can also create requirement groups to create an OR relationship between the requirements.

Related Information

Using Requirement Groups [page 284]
Requirement Groups [page 285]
Creating a Requirement Group [page 283]
Adding Content to Curricula [page 281]

15.2.3 Allowing Users to Fulfill a Requirement with Learning Items from a Subset of Learning Items in a Curriculum

Allow users to fulfill a requirement with learning items from a subset of learning items in the curriculum when you want to give users a choice of courses, and you want them to choose those courses from a subset of the learning items (courses) in the curriculum.

Prerequisites

Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curriculum Requirements*. Create a requirement of type *Number of Items from Pool of Items*. After you create it and click *Next*, you configure the requirement by its type.

Procedure

1. In *Enter the required number of Items* type the number of learning items (courses) that a user must accumulate to meet the requirement.
2. In *Create Item Pool*, click *add one or more from list* to search for and add learning items to the pool.

   Users must select from a pool of learning items that you set in the requirement itself. The pool is a subset of all the learning items in the curriculum. The learning items must be in both places: in the pool of learning items and in the curriculum.

3. Click *Add*.

Next Steps

If you need to change the type or the details of the type, you can change it in *Configuration* on the requirement (*Learning Activities* > *Curriculum Requirements*).

Add the requirement to a curriculum. Within the curriculum, you can add multiple requirements to create an AND connection between the requirements. You can also create requirement groups to create an OR relationship between the requirements.

Related Information

Using Requirement Groups [page 284]
Requirement Groups [page 285]
Creating a Requirement Group [page 283]
Adding Content to Curricula [page 281]

15.2.4 SAP SuccessFactors Learning Curriculum Requirement Types

Curriculum requirement types define the conditions that users must satisfy to complete a curriculum requirement.

A curriculum requirement is a set of conditions that a user must satisfy to earn credit for completion the requirement. The curriculum requirement's type defines how the user can meet those conditions (by fulfilling a number of hours or by fulfilling a number of courses).

You can check a curriculum requirement's type by opening it in *Learning Activities* > *Curriculum Requirements* and going to *Configuration*.

Requirement Type Name	Description	Users must complete...	Users can select from among these things to meet the requirement...
Number of Hours of Specified Hour Type	This requires users to complete a number of hours to fulfill the requirement and those hours must be of a certain type (for example, contact hours or credit hours). Users can select any learning item in the curriculum to fulfill their required hours.	Users must complete an amount of hours of a particular hour type: Credit, CPE, Contact, or Total Hours. For example, users must complete five CPE Hours.	Any course (learning item) in the curriculum that the curriculum requirement is attached to. Because the curriculum requirement inherits its pool of learning items from the curriculum, you do not define the pool in the curriculum requirement itself.
Number of Hours of Specified Hour Type from Pool of Items	This requires users to complete a number of hours to fulfill the requirement, those hours must be of a certain type (for example, contact hours or credit hours), and the hours must come from a subset of learning items in the curriculum (as opposed to any learning item in the curriculum).	Users must complete an amount of hours of one of these types of hours: Credit, CPE, Contact, or Total Hours. For example: user must complete five CPE Hours.	Users must select from a pool of learning items that you set in the requirement itself. The pool is a subset of all the learning items in the curriculum. The learning items must be in both places: in the pool of learning items and in the curriculum.
Number of Items from Pool of Items	This requires users to select a number of items from the pool of learning items.	Users are required to complete an amount of **learning items** from a pool of learning items regardless of the hours. In this requirement type, the hours of the learning items are not relevant.	Users must select from a pool of learning items that you set in the requirement itself. The pool is a subset of all the learning items in the curriculum. The learning items must be in both places: in the pool of learning items and in the curriculum.

15.2.5 Learning Curriculum Requirement Summary Fields

Learning curriculum requirement summary fields contain basic information about the curriculum requirement (for example, the date that it was created or comments that describe the intent of the curriculum requirement).

To edit this information, go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curriculum Requirements*, open the requirement and then go to *Summary*.

This field...	...Is used as follows
Description	Because the content of this box appears in the user interface and in reports, we recommend that you enter a description that helps users identify the entity or its purpose.
Security Domain ID	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Creation Date	When you create a new curriculum requirement entity, the system automatically populates the *Creation Date* box with today's date.
Active	When you make an entity inactive, the system doesn't include that entity in any searches or reports by default; however, some searches and reports allow you to override the default so that you can include inactive entities. You might make an entity inactive (rather than delete it) if you no longer want to use it but keep it for a historical record. Because you can't restore a deleted entity, we recommend that you delete an entity only when you make a mistake in some way (for example, if the entity ID is simply incorrect). If you clear the *Active* check box to inactivate the curriculum requirement, then users who were assigned items through the curriculum requirement won't be affected.
Comments	We recommend that you use the *Comments* box to identify the purpose or intent of the entity. You can also include any information that you think other administrators might need or find useful for understanding the entity and how to use it. All comments are intended for administrators only and can't be viewed in the user interface.

15.2.6 A Learning Requirement's View of Its Curricula

You can view the curricula that are consuming a requirement by opening the requirement.

You often want to know the curricula that are using a requirement. When you do, you can go to SAP SuccessFactors Learning administration, to *Learning Activities* > *Curriculum Requirements*. You can open the requirement and see its curricula in *Curricula*.

The view is read-only. To update how the requirement is used, go to the curriculum (*Learning Activities* > *Curricula*) and open its contents.

15.2.7 When to Use the "Number of Hours of Specified Hour" Learning Requirement Type

If you are using learning curricula and learning requirements, use these tips and examples help you decide when to use the "Number of Hours of Specified Hour" learning requirement **type**.

If you are using curricula and if you are using requirements to set conditions of completion in the curricula, then you set a requirement **type** to define those conditions. In general, requirement types require users to complete either a number of hours or a number of courses. The hours requirement type has a special variation: you can require hours from any course in the curriculum or require hours from only a subset of courses in the curriculum.

You set the type and the rules for the type in SAP SuccessFactors Learning administration. Go to *Learning Activities* > *Curriculum Requirements* > *Configuration*.

Use *Number of Hours of Specified Hour Type* when you are concerned about the number of hours and the type of credit required for users to complete the assigned curriculum, but you want to allow users to fulfill those hours from any learning item (course) in the curriculum. If you want to limit the options of the user to only a subset of courses, then you want to use *Number of Hours of Specified Hour Type from a Pool of Items*.

> **Note**
>
> There are four Hour Types: Contact, Credit, CPE (Credit for Professional Education), and Total hours. For example, if you want a user to complete five Credit Hours of learning you set that hour type and hours in the learning item.

Example: Hours of Specified Hour Type without Period Based Assignment

In this example, the system has an ethics curriculum with the following learning items in it. Each has a set amount of credit hours (set on the learning item).

Course	Hours
Ethics of Business	2 Credit Hours
Ethics of Contract Negotiations	3 Credit Hours
Ethics and the Law	3 Credit Hours

You might want to allow users to select any ethics course as long as the **Credit Hours** (as opposed to other kinds of hours) add up to five credit hours. To allow users to select any combination of ethics courses to fulfill their five credit hours, you can add a requirement called **Five Hours of Ethics Training from the Curriculum** and you make it type *Number Hours of specified Hour Type*.

> **Note**
>
> The specified hour type in this example is credit hours. It could be that Ethics 101 offers two credit hours and five **contact hours** (a different hour type). But because this requirement is specific to credit hours, the contact hours is irrelevant.

Example: Hours of Specified Hour Type with Period-Based Assignment

This example extends the example above by adding a retraining interval of 365 days that is event-based. **Event based** means that the system uses the last notable event to define next time the learning item will need to be completed. The notable event will be either the last completion, the last successful completion, or the assignment of the item, but in general, the user must complete five hours of ethics training every year, where a year is defined by the last event. In this case, the requirement empties out at the beginning of each period and must be filled again for the next year.

15.2.8 When to Use the "Number of Hours of Specified Hour Type from Pool of Items" Learning Requirement Type

If you're using learning curricula and learning requirements, use these tips and examples help you decide when to use the "Number of Hours of Specified Hour Type from Pool of Items" learning requirement **type**.

If you are using curricula and if you are using requirements to set conditions of completion in the curricula, then you set a requirement **type** to define those conditions. In general, requirement types require users to complete either a number of hours or a number of courses. The hours requirement type has a special variation: you can require hours from any course in the curriculum or require hours from only a subset of courses in the curriculum.

You set the type and the rules for the type in SAP SuccessFactors Learning administration. Go to *Learning Activities* > *Curriculum Requirements* > *Configuration*.

Use the *Number of Hours of Specified Hour Type from Pool of Items* requirement type when you want to require a user to complete a number of hours of training and you want to require them to find those hours in a subset of learning items of a curriculum. If you don't want to restrict users to a subset of learning items in a curriculum, then choose *Number of Hours of Specified Hour*.

Example: Number of Hours of Specified Hour Type from Pool of Items with Curriculum and Sub-Curriculum

In this example, the system has an accounting curriculum with three learning items in it.

Course	Hours
Accounting 100	2 Credit Hours
Accounting 200	4 Credit Hours
Accounting 300	6 Credit Hours

It also has an ethics sub-curriculum.

Course	Hours
Ethics of Business	2 Credit Hours
Ethics of Contract Negotiations	3 Credit Hours
Ethics and the Law	3 Credit Hours

The goal of the example is to require accountants who are assigned this curriculum to complete five credit hours of ethics courses. You **don't** want the accounting classes to count toward users meeting their ethics requirement. You only want them to get credit for ethics hours from ethics courses. To do that, you:

1. Create the curriculum and sub-curriculum and assign the learning items to them.
2. Create the requirement of type *Number of Hours of Specified Hour Type from Pool of Items* and set the number of required credit hours to five.
3. Add the ethics courses to pool of items in *Learning Activities* > *Curriculum Requirements* > *Configuration*.

> **Note**
>
> For users to apply learning items to the requirement, the learning item must be in **both** the requirement and the curriculum. If you removed Ethics and the Law, from the curriculum, for example, the user wouldn't be assigned the ethics course and therefore couldn't use it for the requirement, even though Ethics and the Law is in the requirement pool.

Example: Hours of Specified Hour Type from Pool of Items with a Period-Based Curriculum and Requirement

This example extends the example above by adding a retraining interval of 365 days that is event-based. **Event based** means that the system uses the last notable event to define next time the learning item will need to be completed. The notable event will be either the last completion, the last successful completion, or the assignment of the item, but in general, the user must complete five hours of ethics training every year, where a year is defined by the last event. In this case, the requirement empties out at the beginning of each period and must be filled again for the next year.

At the start of each year, users can start to fulfill their five-hour ethics requirement again. And again, they must choose from within the pool of learning items in the requirement.

15.2.9 When to Use the "Number of Items from Pool of Items" Learning Requirement Type

If you're using learning curricula and learning requirements, use these tips and examples help you decide when to use the *Number of Items from Pool of Items* learning requirement **type**.

If you are using curricula and if you are using requirements to set conditions of completion in the curricula, then you set a requirement **type** to define those conditions. In general, requirement types require users to complete either a number of hours or a number of courses. The hours requirement type has a special variation: you can

require hours from any course in the curriculum or require hours from only a subset of courses in the curriculum. You set the type and the rules for the type in SAP SuccessFactors Learning administration. Go to *Learning Activities* > *Curriculum Requirements* > *Configuration*.

Use the *Number of Items from Pool of Items* learning requirement type when you can identify a group of items of similar weight that can easily be exchanged. With this requirement, users are required to complete a minimum number of learning items from a pool of learning items.

Example: Number of Items from Pool of Items with Curriculum and Requirement

In this example, the system has an ethics curriculum with the following learning items in it and each has the following credit hours.

Course	Hours
Ethics of Business	2 Credit Hours
Ethics of Contract Negotiations	3 Credit Hours
Ethics and the Law	3 Credit Hours

You aren't concerned about the number of hours in the ethics course. You only want your users to complete **two of the three courses**. Customers often create this kind of requirement when the hours are similar and the content is very similar. Users can select two courses that fit their interests and schedule, as long as they complete two of them. To create this requirement:

1. Add a new requirement (*Learning Activities* > *Curriculum Requirements*) and make it of the type *# Items from Pool of Items*.
2. Set the number of required items to two because you want users to complete two of the three learning items.
3. Add the three ethics courses to the pool of items (in *Configuration*).
4. Add the requirement to the curriculum.

Example: Number of Items from Pool of Items with a Period-Based Curriculum and Requirement

This example extends the example above by adding a retraining interval of 365 days that is event-based. **Event based** means that the system uses the last notable event to define next time the learning item will need to be completed. The notable event will be either the last completion, the last successful completion, or the assignment of the item, but in general, the user must complete five hours of ethics training every year, where a year is defined by the last event. In this case, the requirement empties out at the beginning of each period and must be filled again for the next year.

15.2.10 Learning Requirements

Learning requirements are a set of conditions that users must meet to receive a complete curriculum status when you create a requirement-based curriculum.

You create requirements for curricula, so if you aren't using curricula, you don't need to create requirements. If you're using curricula, then requirements provide a way to build flexibility into curricula. For example, you could create a recognizing bias requirement for managers. The conditions of the requirement could say that they need 10 contact hours and they can get those contact hours (hours in contact with an instructor) from any one of a pool of 20 courses.

To provide the flexibility, you define the conditions that users must meet to be considered complete. You can write a requirement that says that users must complete a certain number of credit hours or CPE hours to be considered complete. Or you can write a requirement that specifies that users must finish a set of learning items (courses) from a pool of learning items. The conditions (hours or items in these two examples) are set by the requirement type.

You can create and manage requirements by going to SAP SuccessFactors Learning Administration and then going to *Learning Activities* > *Curriculum Requirements*.

> → Tip
>
> Items that are part of a curricula requirement must also be part of a library to which a user has access or the user won't be able to add the item to their learning plan or launch the content.

15.2.11 Copying a Requirement

Copy requirements if you already have requirements in the system and you want to create new requirements that resemble them.

Context

You often have requirements that closely resemble each other. For example, you might have a requirement for 10 credit hours that you want to use in a more junior-level curriculum and a requirement for 20 hours in a more senior-level requirement. The pool of items might remain the same. You can create the senior requirement and then copy it to create the junior requirement. When you do, SAP SuccessFactors Learning copies the data from *Learning Activities* > *Curriculum Requirements* > *Summary* and *Learning Activities* > *Curriculum Requirements* > *Configuration* to the new requirement.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Curriculum Requirements*.

2. Search for and open the requirement that you want to use as a template: the requirement you want to copy.
3. In *Summary* click *Copy*.
4. If prompted (if you don't auto-generate IDs), in the *New Requirement ID* box, type an ID for the new requirement.
5. Type a description in the *Description* box.

   Because the content of this box doesn't appear in the user interface or any reports, we recommend that you use the box to fully explain to other administrators the purpose for creating this entity.
6. Click *Copy*.

15.3 Adding Learning Tasks

Add Learning tasks if you're using task checklists to verify that learners can demonstrate a physical skill they've learned. Tasks are also helpful for instructional design.

Context

A task is something that you expect a user to be able to do after they complete training. If you have physical standard operating procedures, each step in the procedure can be a task. For example, if you have a standard operating procedure for fueling an airplane, and the first step in the procedure is to connect the earth ground, then **connecting the earth ground** can be a task. Later, when an observer verifies that a learner can follow the standard operating procedure, the observer watches the learner connect the earth ground and marks the task complete. The learner then demonstrates the next task in the procedure, the observer marks it complete, and so on.

> **Note**
>
> As an instructional designer, you can also add tasks to support your instructional goals. Tasks can serve as the basis for creating learning objectives and assessments.

Procedure

1. Go to Learning Administration and then go to *Content* > *Tasks*.
2. Click *Add New*.
3. Add the metadata for the task.

Choice	Description
Description	Write a description that follows your company's task pattern. For example, you can start all descriptions with **Learner**

Choice	Description
	demonstrates and then the activity that they should be able to demonstrate to an observer.
Security Domain	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.
Active	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.

4. Click *Add*.

Next Steps

If you're using tasks for task checklists, create a course of type other and add the tasks to it. Configure the task checklist and observers in the course.

If you're using tasks for instructional design, add instructional design analysis and add the tasks to other instructional design elements.

15.3.1 Adding Attributes to Tasks

Add attribute types of competency and skill to tasks if you're using tasks for instructional design purposes.

Prerequisites

- For users who have enabled Talent Intelligence Hub, ensure you've migrated attributes.
- For users who have enabled Job Profile Builder, ensure you've imported competencies from Job Profile Builder.
- For users who have enabled Job Description Manager, ensure you've imported competencies from Job Description Manager.

Context

You can add attributes to tasks to help instructional designers understand what attributes are prerequisites for completing the task, what attributes users demonstrate as a result of completing the task, or a combination of both. When you add attributes to tasks, you don't affect the behavior of Learning.

> **Note**
>
> While Talent Intelligence Hub users can add attributes of type competency and skill, Job Description Manager and Job Profile Builder users can find and add **only** competencies to tasks.

Procedure

1. Go to *Learning Administration* > *Content* > *Tasks*.
2. Search and edit a task.
3. Go to *Attributes* tab.
4. If you want to add attributes directly using their ID, perform the following steps. Otherwise, skip this step.
   a. Enter an attribute ID. You can't enter more than one ID in the field.

      > **Note**
      >
      > Job Description Manager or Job Profile Builder users enter a competency ID in the field.

   b. Choose *Add*.

      Repeat the steps if you want to add additional attributes to the task.
5. If you want to add multiple attributes, perform the following steps.
   a. Choose *add one or more from list*.
   b. Search and find the attributes that you to associate.
   c. Select one or more attributes and choose *Add*.

Results

The attributes are listed in the update section. You can also remove associated attributes from the task if necessary. From the list, select the *Remove* checkbox for the attributes that you want to remove and then choose *Apply Changes*.

Related Information

Migration of Learning Competencies to Center of Capabilities [page 1356]
Scheduling Capabilities Synchronization Process [page 1261]
Scheduling Attributes Synchronization Process [page 1261]

15.3.2 Adding Documents to Tasks

Add documents to tasks to help instructional designers with the analysis step of their instructional design process.

Context

You can add documents to tasks to help instructional designers understand the source of the task. If a task is a part of a standard operating procedure, for example, you can attach the standard operating procedure document to the task.

Procedure

1. Go to Learning Administration and then go to *Content* > *Tasks*.
2. Find and open the task.
3. Go to *Documents*.
4. Click *add one or more from list* to add the documents to the task.

15.3.3 Adding Instructional System Design Analysis to Tasks

Add Instructional System Design (ISD) analysis to tasks if you have an ISD practice to define your tasks by outcomes, goals, and conditions. .

Procedure

1. Go to Learning Administration and then go to *Content* > *Tasks*.
2. Find and open the task.
3. Go to *ISD Analysis*.
4. Add your analysis in the form.

15.3.4 Viewing the Courses That Use Tasks

View the courses that use tasks if you're troubleshooting a task checklist and you want to see which courses use a task. If you're using tasks for instructional design, the courses tell you the courses that address the task.

Procedure

1. Go to Learning Administration and then go to *Content* > *Tasks*.
2. Find and open the task.
3. Go to *Items*.

Next Steps

To add or remove tasks from courses, go to *Learning Activities* > *Items*, open the course, and then go to *Tasks*.

15.3.5 Adding Job Codes to Tasks

Add job codes to tasks if you're using tasks for instructional design purposes.

Context

You can add job codes to tasks to help instructional designers understand what job codes require proficiency in the task. When you add job codes to tasks, you don't affect the behavior of Learning.

Procedure

1. Go to Learning Administration, and then go to *Content* > *Tasks*.
2. Find and open the task.
3. Go to *Job Codes*.
4. Choose *add one or more from list* to add the job codes to the task.
5. Choose *Add*.
6. Choose *Apply Changes*.

15.3.6 Adding Job Locations to Tasks

Add job locations to tasks if you are using tasks for instructional design purposes.

Context

You can add job locations to tasks to help instructional designers understand what job locations require proficiency in the task. When you add job locations to tasks, you do **not** affect the behavior of Learning.

Procedure

1. Go to Learning Administration, and then go to *Content* > *Tasks*.
2. Find and open the task.
3. Go to *Job Locations*.
4. Click *add one or more from list* to add the job locations to the task.

15.3.7 Adding Objectives to Tasks

Add objectives to tasks if you are using tasks for instructional design purposes.

Context

You can add objectives to tasks to help instructional designers understand what objectives address the tasks and what the learners should be able to demonstrate as a result of reaching the learning objective. When you add objectives to tasks, you do **not** affect the behavior of Learning.

Procedure

1. Go to Learning Administration, and then go to *Content* > *Tasks*.
2. Find and open the task.
3. Go to *Objectives*.
4. Click *add one or more from list* to add the objectives to the task.

15.4 Adding Learning Documents

Add documents (books, videos, standard operating procedures, and so on) to support instructional design and delivery.

Context

You can add documents to attach them to courses, to curricula, and to tasks for the purpose of instructional design or delivery.

- Curricula and tasks use documents for instructional **design**:
  - If a **task** is a part of a standard operating procedure, for example, you can attach the standard operating procedure document to the task.
  - If a **curriculum** supports qualification in regulations, for example, you can attach the regulations document to the task.
- Courses and classes use documents for instructional **delivery**. If you have a hand-out that you want users to see, you can add it to courses.

Procedure

1. Go to Learning Administration and then go to *Content* > *Document Links*.
2. Click *Add New*.
3. In *Add New Document Link* define the document metadata, including the file path to the document.

Next Steps

Go to tasks, classes, courses, and curricula to associate the document with the unit of learning.

Related Information

Why you Might add Documents to Courses or Classes [page 465]
Learning Document Links Metadata [page 461]

15.4.1 Learning Document Links Metadata

Learning document links metadata describes a document link that you add to SAP SuccessFactors for the purpose of instructional design.

Field	Description
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.
Document Link Type	You can associate a document link with a document category or type. For example, you can designate a document link as an operations guide, user manual, or text book.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Source	The *Source* indicates the origin or requiring authority of the document.
Author	The *Author* is the name of the document's original author or the group responsible for the document.
File Path	This is a brief description of where the document is physically located.
Revision Number	This is the current revision number of this document link. To edit the number, type the change directly into the field. When you save a new revision number in the *Revision Number* field, the *Needs Review* status in the *Items* tab, *Curricula* tab, and *Tasks* tab is changed from **No** to **Yes**.
Reviser	The name of the person or group responsible for the current revision of the document link.
Approver	The name of the person or group responsible for approving revisions to the document link.
Comments	All comments are intended for administrators only and can't be viewed in the user interface. We recommend that you use the *Comments* box to identify the purpose or intent of the document link. You can also include any information that you think other administrators might need or find useful for understanding the document link and how to use it.

15.4.2 Reviewing Document Links Used by Tasks

Review document links that are used by tasks when you want to troubleshoot the tasks that use document links or when you want to review documents that are used in tasks.

Context

You add document links to tasks in *Content* > *Tasks*. If you see a missing document link, go to the task and add the document link.

When you first create the relationship, we assume that you've reviewed the document that you're linking to the task, so *Needs Review* is clear to indicate that you do **not** need to review the document. As you revise the document, however, review its relationships. To assure that you review relationships when you revise documents, Learning automatically selects *Needs Review* when you add a higher revision number in *Documents* > *Revision Number* > *Summary*.

Procedure

1. Go to Learning Administration, go to *Content* > *Document Links*, and then find and open the document link that you want to troubleshoot.
2. Go to *Summary* to familiarize yourself with the document link that you want to review.

   > → Tip
   >
   > Good comments help you understand the document link. If you want to read the full document, open it at the file path in *File Path*.

3. Go to *Tasks*.
4. To verify that you've reviewed the relationship and that the document link is still valid for the task, clear *Needs Review* for the task.

   Needs Review shows you if you need to review the **relationship** between the current revision of a document and the corresponding task.

   - If it's selected, then review the relationship.
   - If it's clear, you don't need to review the relationship.

5. Choose *Apply Changes*.

15.4.3 Reviewing Documents Used by Classes

Review documents that are used by classes when you want to troubleshoot the classes that use documents or when you want to review documents that are used in classes.

Context

You add documents to classes in *Learning Activities* > *Classes*. If you see a missing document, go to the class and add the document.

When you first create the relationship, we assume that you have reviewed the document that you are adding to the class, so *Needs Review* is clear to indicate that you do **not** need to review the document. If you see that the document needs review when you are working with the class, you can select *Needs Review* in the **Class**. If you select *Needs Review* in the class, it is also selected in **documents**.

Procedure

1. Go to Learning Administration, go to *Content* > *Document Links*, and then find and open the document that you want to troubleshoot.
2. Go to *Summary* to familiarize yourself with the document that you want to review.

   > → Tip
   >
   > Good comments help you understand the document. If you want to read the full document, open it at the file path in *File Path*.

3. Go to *Classes*.
4. To verify that you have reviewed the relationship and that the document is still valid for the class, clear *Needs Review* for the class.

   Needs Review shows you if you should review the **relationship** between the current revision of a document and the corresponding class.

   - If it is selected, then you should review the relationship.
   - If it is clear, you do not need to review the relationship.

5. Click *Apply Changes*.

15.4.4 Reviewing Documents Used by Courses

Review documents that are used by courses when you want to troubleshoot the courses that use documents or when you want to review documents that are used in courses.

Context

You add documents to courses in *Learning Activties* > *Items* > *Document Links*. If you see a missing document, go to the course and add the document.

When you first create the relationship, we assume that you've reviewed the document that you're adding to the course, so *Needs Review* is clear to indicate that you don't need to review the document. If you see that the document needs review when you're working with the course, you can select *Needs Review* in the **Class**. If you select *Needs Review* in the course, it's also selected in **documents**.

Procedure

1. Go to Learning Administration, go to *Content* > *Document Links*, and then find and open the document that you want to troubleshoot.
2. Go to *Summary* to familiarize yourself with the document that you want to review.

   > → Tip
   >
   > Good comments help you understand the document. If you want to read the full document, open it at the file path in *File Path*.

3. Go to *Items*.
4. To verify that you've reviewed the relationship and that the document is still valid for the course, clear *Needs Review* for the course.

   Needs Review shows you if you should review the **relationship** between the current revision of a document and the corresponding course.

   - If it's selected, then you should review the relationship.
   - If it's clear, you don't need to review the relationship.

5. Click *Apply Changes*.

15.4.5 Reviewing Documents Used by Curricula

Review documents that are used by curricula when you want to troubleshoot the curricula that use documents or when you want to review documents that are used in curricula.

Context

You add documents to curricula in *Learning* > *Curricula*. If you see a missing document, go to the curriculum and add the document.

When you first create the relationship, we assume that you have reviewed the document that you are adding to the curriculum, so *Needs Review* is clear to indicate that you do **not** need to review the document. As you revise the document, however, you should review its relationships. To assure that you review relationships when you revise documents, Learning automatically selects *Needs Review* when you add a higher revision number in *Document Links* > *Revision Number* > *Summary*.

Procedure

1. Go to Learning Administration, go to *Content* > *Document Links*, and then find and open the document that you want to troubleshoot.
2. Go to *Summary* to familiarize yourself with the document that you want to review.

   > → Tip
   >
   > Good comments help you understand the document. If you want to read the full document, open it at the file path in *File Path*.
3. Go to *Curricula*.
4. To verify that you have reviewed the relationship and that the document is still valid for the curriculum, clear *Needs Review* for the curriculum.

   Needs Review shows you if you should review the **relationship** between the current revision of a document and the corresponding curriculum.
   - If it is selected, then you should review the relationship.
   - If it is clear, you do not need to review the relationship.
5. Click *Apply Changes*.

15.4.6 Why you Might add Documents to Courses or Classes

Attach documents to courses or classes when the documents support the knowledge that you want to teach in the course (learning item) or class.

Documents support the learning that takes place in courses or classes. For example, if you are teaching a set of Standard Operating Procedure (SOP) documents in your course, you can attach them to course. When the

course or class appears to learners and instructors, they see the documents as attachments to the course or class respectively. In the example of SOP documents, they can see the documents so that they can familiarize themselves with the content.

You can attach documents to either a course or a class depending on the business case of the individual courses or classes.

For example, a service desk course might be scheduled globally, with classes in New York, London, and Singapore. Although you might want to share SOP documents among all three instances of the course, you might want the class in London to have different instructors, locations, and other information specific to the class. You might want to attach an agenda to the class to introduce the instructor, provide information about the classroom, and so on. The roster is produced automatically, so you don't need to attach it.

> → Remember
>
> When you create a class, documents added to the associated learning items aren't automatically inherited by the class. You'll need to manually add these documents to the class as needed.

These areas of the application support this feature:

- *Learning Activities* > *Classes* > *Documents*: This is where administrators attach the documents.
- *Content* > *Document Links* > *Classes*: This is where content administrators can see the classes that use a particular document.
- Users' Class Details: This is where users can see the documents.
- Document Data Reports: Class details are available in the document reports.

15.4.7 Adding Learning Document Link Types

Add document link types to categorize Learning document links to make them easier to find.

Context

If you use document links to help plan your instructional design, you can categorize them by document link **type** so that they're easier to find. For example, you can add types of standard operating procedure, policy statement, or reference manual. Learning administrators can then search for all standard operating procedures or policy statements.

> ⓘ Note
>
> You typically **import** document link types in bulk during implementation and then review them periodically. During reviews, most customers add one or two new document link types.

To use this tool, you must have the following permissions:

- Add Document Link Type
- Delete Document Link Type
- Edit Document Link Type

- View Document Link Type

Procedure

1. Go to Learning Administration, and then go to *References* > *Online Content* > *Document Link Types*.
2. Click *Add New*.
3. Add a document link type ID and description.
4. Click *Add*.

Next Steps

When you add Learning document links to *Content* > *Document Links*, you can select the document link type to categorize the document link.

16 Competencies in Learning

Learning reports competency scores for completing courses. It doesn't calculate competency scores based on assessments.

You can add competencies into Learning to describe what a successful employee in the job should be able to do.

- Compentencies can be added through the Competency Connector which uses the Competency Library Export job.
- The *Capabilities Synchronization* automatic process is used to migrate and sync competencies if you've migrated to Center of Capabilities model. On completion of the migration, the existing SF Competency Connector for Job Description Manager is deactivated, and the *Capabilities Synchronization* job synchronizes competencies to Learning.
  Once the compentencies are migrated and synced, you can then assign the competencies to courses. When you assign competencies to courses, learners know what competencies the courses address and what rating they should expect if they complete the courses successfully. For example, if a manager completes a communication course successfully, the manager's competency rating can move to a four on a five point scale. When you run the learning event recorder, you have the option to adjust the learners' competency ratings.

> ### Example
>
> Let's say managers need a high communication competency level. After you add the competencies to Learning, you can assign the competencies to courses. When you assign competencies to courses, learners know what competencies the courses address and what rating they should expect if they complete the courses successfully. For example, if a manager completes a communication course successfully, the manager's competency rating can move to a four on a five point scale. When you run the learning event recorder, you have the option to adjust the learners' competency ratings.

> ### Restriction
>
> Do **not** create competencies in Learning. Always import them from Job Profile Builder.

> ### Note
>
> Additionally, administrators accessing Learning from SAP SuccessFactors can no longer add, copy, or delete competencies.

Related Information

Migration of Learning Competencies to Center of Capabilities [page 1356]

16.1 Tasks in Learning Competencies

View this section if you want to review the tasks that are associated with a competency.

You can use *Performance* > *Competencies* > *Tasks* to review all of the tasks that are associated with a competency. A task is a unit of work that has a beginning and end, resulting in a finished product, a completed service, or a change in the work environment. Use tasks to create a relationship between learning items and job performance. For example, if your employees have job tasks to start up, operate, and shut down a machine, then a learning item about the machine should cover those tasks. You can associate a task with a competency in *Competencies* (*Learning* > *Tasks* > *Competencies*).

16.2 Don't Copy Competencies in Learning

Don't copy competencies from within Learning Administration. Manage competencies, including copying, in Job Profile Builder.

> ⚠ Restriction
>
> Don't create competencies in Learning. Copying competencies is creates new competencies. Always import them from Job Profile Builder.

You create competencies in Job Profile Builder to describe what a successful employee in that job should be able to do. For example, managers need a high communication competency level. After you import the competencies to Learning, you can assign the competencies to courses. When you assign competencies to courses, learners know what competencies the courses address and what rating they should expect if they complete the courses successfully. For example, if a manager completes a communication course successfully, the manager's competency rating can move to a four on a five point scale. When you run the learning event recorder, you have the option to adjust the learners' competency ratings.

16.3 Adding Subject Areas to Competencies

Add subject areas (topics) to competencies to better organize the set of competencies that you import from Job Profile Builder to Learning.

Context

Courses and competencies in the same subject area should address the same kind of content: for example, Safety, Accounting, Manufacturing Process, or Quality Assurance. Associate subjects areas with a competency so that you can use it to make searches easier. You can search for all courses in a subject area and all competencies in a subject are, for example. End users do **not** see the competency subject areas.

Procedure

1. Go to Learning Administration and then go to *Performance* > *Competencies*.
2. Find and open the competency you want to troubleshoot.
3. Go to *Subject Areas*.
4. Click *add one or more from list* to add subject areas to the competency.

16.4 Learner Profile does not Track Competencies

The learner profile does **not** track which competencies are assigned to users.

SAP SuccessFactors Learning has only one role in competency assessments: when a user completes a learning item, the Learning Management System (LMS) records the score that the user earns for completing the course and also the rating scale that the user was rated against. It records the scale so that assessments that are scored against different scales can be normalized.

Learning reports the competency change when learners complete a course regardless of whether the competencies are on the learners' profiles.

16.5 Competency Summary Fields

Competency summary fields contain the basic information about a SAP SuccessFactors Learning competency, which is a skill or knowledge that users should gain from learning.

You can use *Learning Activities* > *Competencies* > *Summary* to edit or review the settings for a competency. A competency is a skill, ability, or attitude that can be assigned to users (for example, your company could assign competencies to users based on the organization that they belong to, the job position that they hold, or both).

Name	Description
Description	Because users see the contents of the *Description* and *Explanation* boxes (for example, during an assessment or performance review) for each competency that they are associated with, we recommend that you create a description that captures the essence of (like the title of a book) and an explanation that more fully describes (like a synopsis or abstract of a book) each competency.

Name	Description
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Competency Category	A competency category is an attribute that you **must** associate with a competency that classifies its relationship to the competency (for example, a competency that relates to communication, initiative, or leadership). When you associate a competency category with a competency, you affect how the system organizes the competency (which makes it easier for administrators to locate) and also how it groups the competency on an assessment survey. You can control how the system groups competencies on assessment surveys on the Formatting tab of the Assessment Surveys section: *Performance* > *Assessment Surveys* > *Formatting tab*. You can add or edit competency categories in the Competency Categories section: *References* > *Performance* > *Competency Categories*.
Competency Type	A competency type is an attribute that you **must** associate with a competency that identifies the aptitude that each competency measures. When you associate a competency type with a competency, you affect how the system organizes the competency (which makes it easier for administrators to locate). By default, the system includes four competency types (ability, attitude, knowledge, and skill). • Ability – Capacity to meet physical or mental requirements for job-related tasks (for example: swim 500 meters). • Attitude – Behavior necessary for performing job-related tasks (for example: Receives Constructive Criticism without Becoming Defensive). • Knowledge – Facts and information necessary to comprehend, recognize, or recall terms, rules, concepts, and symbols related to performing job-related tasks (for example, Safety Guidelines for Scaffolding). • Skill – Physical or mental abilities necessary for performing job-related tasks (for example, Keeps meetings on task and on time). You can add or edit competency types in *References* > *Performance* > *Competency Types*.

Name	Description
Rating Scale	Rating scales depend on the competency types that you create. For example, you cannot measure a user's speed in the 500-yard swim (an ability) in the same way that you measure his or her behavior toward peers (an attitude). For instance, the ability most likely requires a range of times (5-6 minutes = 100, 7-8 minutes = 80, etc) whereas the attitude requires a subjective list (Highly values peers = 100, Somewhat values peers = 80, etc.) You can manage rating scales on the Summary tab of the Rating Scales section: *References* > *System Admin* > *Rating Scales*.
Competency Source	A competency source is an attribute that you can associate with a competency that identifies the origin of the competency. For example, the competency source might be the creator of the competency or the regulatory body that requires the competency. You can add or edit competency sources in the Competency Sources section: *References* > *Performance* > *Competency Sources*.
Explanation	Because users see the contents of the *Description* and *Explanation* boxes (for example, during an assessment or performance review) for each competency that they are associated with, we recommend that you create a description that captures the essence of (like the title of a book) and an explanation that more fully describes (like a synopsis or abstract of a book) each competency.
Comments	We recommend that you 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 scheduled offering 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.

Name	Description
Version Number	The system increments the version number (read-only) when you select a different rating scale. If a user was already assessed for the competency, then the system also increments the version number if you change the rating criteria on the Rating Criteria tab. If you change the rating criteria, then any assessments that were completed for the competency will no longer appear in the user's Assessments tab. When the system increments a competency's version number, previously assessed users see the rating criteria of the prior version.
Active	When you make a record inactive, the system does not include that record in any searches or reports by default; however, some searches and reports allow you to override the default so that you can include inactive records. You might make a record inactive (rather than delete it) if you no longer want to use it but keep it for a historical record. Because you cannot restore a deleted record, we recommend that you delete a record only when you make a mistake in some way (for example, if the record ID is simply incorrect). You can inactivate (but not delete) a competency if it exists on a user record or current assessment survey.
Enable electronic signature	When you enable electronic signatures, you force the system to prompt administrators, users, instructors, or others for an ID, a PIN, and sometimes a meaning code to proceed with a process (for example, recording a learning event, submitting a performance review, or submitting a competency assessment) that requires an electronic signature. As an administrator, if you forget your PIN, then we recommend that you contact your administrator, who can reset it on the Summary tab of your administrator record: *System Admin* > *Application Admin* > *Admin Management*. You must globally enable electronic signatures in: *System Admin* > *Configuration* > *Global Variables*.

16.6 Rating Criteria in Competencies within Learning

You can look at the rating criteria that competencies use in Learning, but do not change them. Instead change it in Job Profile Builder.

You can go to *Performance* > *Competencies* and look at *Rating Criteria* to see the rating criteria and suggested comments for the competency. When learners complete the course they are rated based on the rating scale you see here.

16.7 Viewing the Competency Profiles in Competencies

View the competency profiles of competencies when you know the competency and want to see the profiles it belongs to. You often view the competency profiles in competencies when you are troubleshooting.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Competencies*.
2. Find and open the competency you want to troubleshoot.
3. Go to *Competency Profiles*.

16.8 Viewing the Objectives in Competencies

View the objectives in competencies when you know the competency and want to see the objectives that refer to it. You often view competencies in objectives when you are troubleshooting.

Procedure

1. Go to Learning Administration and then go to *Performance* > *Competencies*.
2. Find and open the competency you want to troubleshoot.
3. Go to *Objectives*.

16.9 Reviewing Programs in Competencies

View the programs in competencies when you know the competency and want to see the programs that refer to it. You often view the programs in competencies when you are troubleshooting.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Competencies*.
2. Find and open the competency you want to troubleshoot.
3. Go to *Programs*.

Results

You can see the programs that are mapped to the competency.

16.10 Finding Learning Competencies by Rating Scales

Find Learning competencies by their rating scales if you know the rating scales and you want to see which competencies they belong to.

Context

> ⚠ Restriction
>
> Don't create competencies in Learning. Instead, create them in Job Profile Builder and import them to Learning.

Procedure

1. Go to Learning Administration and then go to *References* > *System Administration* > *Rating Scales*.
2. Find and open the rating scale that you want to use as a way to identify competencies.
3. Go to *Competencies*.

Results

You see all competencies that use this rating scale.

16.11 Adding Competencies to Learning Objectives

Add competencies to learning objectives so that when users meet the objective, they get credit for the competencies.

Prerequisites

Before SAP SuccessFactors Learning can trigger a competency completion based on completing a learning objective, you must create a mechanism for marking the objective complete. If you are using objectives to mark competencies complete, then chances are that you want to use an exam to test users. If users pass the questions associated with an objective, then they are marked complete in the objective.

Context

You can set up a system that grants competency credit to users for achieving a learning objective. For example, if users are assigned a competency that requires them to identify conflicts of interest, you can allow them to meet that competency by successfully meeting a learning objective about identifying conflicts of interest.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Objectives*.
2. Find and open the objective that you want to use to close a competency.
3. Click *add one or more from list*.
4. Find the competency that should be closed if users meet the objective and add it to the objective.

17 Integrating SAP SuccessFactors Learning with Talent Intelligence Hub

To use attributes of type **competency** and **skill** in items, programs, tasks, and objectives, you must enable Talent Intelligence Hub.

Prerequisites

- Enabled Job Description Manager or Job Profile Builder.
- Validated Tenant Sealing.
- Configured a minimum of one active locale (preferably all locales) in SAP SuccessFactors Learning that matches the locale in Talent Intelligence Hub.
- Verified in progress *Capabilities Synchronization* and *Competency Connector – SF* jobs are completed.

Context

Job Description Manager or Job Profile Builder users can enable Talent Intelligence Hub.

> **Note**
>
> Newly provisioned or existing SAP SuccessFactors tenants delivered with Talent Intelligence Hub, however without Learning can now adopt Learning after the Talent Intelligence Hub upgrade is complete. No specific action is required from users, but the Learning license and feature enablement in *Provisioning* are still required. Previously, only existing Learning users could integrate with the Talent Intelligence Hub framework.

When this integration is enabled:

- You can view the associated attributes and its ratings for completed courses only from *Growth Portfolio*. The attributes associated with the following learning completions aren't added to *Growth Portfolio*:
  - Learning history data imported from the previous system using *Learning History Connector*.
  - Course completions of users without a Person GUID.

    > **Note**
    >
    > A user must have a Person GUID for posting their learning completions. Either run *Person IDs Connector* to add Person IDs to Learning or run *User Connector - SF* to sync users and their data from platform to Learning.

  - Completions of Learning-only users because native users don't have a Person GUID.
- Finding attributes by their rating scale isn't supported.
- The ratings of the existing competencies are replaced by the ratings configured in Talent Intelligence Hub. We recommend you examine the rating levels associated with items and programs.

- If the proficiency rating scale isn't configured in Center of Capabilities, rating in SAP SuccessFactors Learning gets a default five-point proficiency level scale. **This configuration applies only to users migrating from Center of Capabilities**. The default proficiency level scale is configurable. However, you can't modify the default scale after you enable *Growth Portfolio* in your tenant.

Procedure

1. Go to *Admin Center* > *Upgrade Center* .
2. Enable *Talent Intelligence Hub*.

   To follow a detailed procedure to enable Talent Intelligence Hub for your tenant, refer to the **Related Information** section.

Next Steps

- Modify the default schedule of the *Attributes Synchronization* automatic process if necessary.
- Add attributes and associate ratings to items, programs, tasks, and objectives.
- Review the synced attributes and its associations from the *Attributes* page.
- Find attributes associated in items, programs, tasks, proficiency scales, and objectives.
- If you want to access the legacy competencies and its associations, enable the visibility of the *Competencies* entity.

Related Information

Migrating from Center of Capabilities to Talent Intelligence Hub
Learning Item Connector
Finding Learning Attributes [page 480]
Adding Attributes to Items Manually [page 76]
Adding Attributes to Objectives [page 437]
Adding Attributes to Programs [page 261]
Adding Attributes to Tasks [page 455]
Person IDs Connector
User Connector - SF
Scheduling Attributes Synchronization Process [page 1261]
Auto-Publish Ratings From Learning Completion to Growth Portfolio [page 479]

17.1 Auto-Publish Ratings From Learning Completion to Growth Portfolio

When the integration between Learning and the Talent Intelligence Hub is in place, ratings from learning completions can be automatically published to the *Growth Portfolio* using different methods, based on how the completions are recorded.

You can record completions:

- Manually, using the *Add to Learning History* page. Learners can also record their completions upon finishing their learning.
- Automatically, through the Learning History Connector
- Through data upload, using the *Import Data* tool

The following configurations are required regardless of the method used to record completions:

- Enable the *Auto Record Competency Rating on Item Completion* in the item-level settings.
- Enable *Credit Given* from *References* > *Manage Users Learning* > *Completion Status*.

> **Note**
>
> When you use the Learning History Connector, an additional configuration is required. Contact Product Support to complete any non-implementation tasks related to this setup. For more details, see Knowledge Base Article 3709086.

Related Information

Integrating SAP SuccessFactors Learning with Talent Intelligence Hub [page 477]
Adding Course Completion Status [page 581]
Add Learning History for Multiple Courses [page 245]
Add Learning History with Finance [page 239]
Importing Data [page 1282]

17.2 Viewing Legacy Competencies Page

Enable the visibility of the competencies entity for your tenant if you want to view the legacy competencies and its associations after the Talent Intelligence Hub integration.

Prerequisites

You've upgraded your tenant to Talent Intelligence Hub.

Context

In the Talent Intelligence Hub integrated tenant, the *Competencies* menu is hidden from *Leaning Activities* by default.

> **Note**
>
> Rating labels, descriptions, and calculations of learning rating scales are fetched from *Rating Scales* for Talent Intelligence Hub users.

Procedure

1. Go to *Learning Administration* > *System Administration* > *Configuration* > *System Configuration*.
2. Find and open *LMS_ADMIN*.
3. Set **`showCompetenciesMenuAfterTalentIntelligenceHuBMigration`** to **`true`**.
4. Choose *Apply Changes*.

Results

You can access *Competencies* from the *Learning Activities* menu.

Related Information

Competencies in Learning [page 468]
Adding Learning Rating Scales [page 111]

17.3 Finding Learning Attributes

You can view attributes synchronized to SAP SuccessFactors Learning to understand how each attribute is defined, and its associations with items, programs, proficiency levels, categories, tasks, and objectives.

Prerequisites

You've upgraded your tenant to Talent Intelligence Hub.

Context

The attributes fields namely attribute ID, attribute name, attribute status, attribute type, tags, and description that you see for each attribute are synchronized from Talent Intelligence Hub.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Attributes*.
2. Enter values for each field that you want to use to filter your search.

   > **Note**
   >
   > If you don't see the relevant fields, choose *Add/Remove Criteria* and then select the fields to filter your search.

3. Choose *Search*.
4. Choose an attribute.
   The summary of the chosen attribute appears. It includes details of security domain, associated tags, and description.
5. To change the default security domain, use the magnifying glass icon in the *Security Domain* field to update it and save your changes.

   > **Note**
   >
   > The domain configured in the *Attributes Synchronization* job is considered the default security domain.

6. Expand *Tags* to see a complete list of all tags associated with the attribute.
7. The description value isn't editable from the *Summary* page. You can update it from the *Manage Talent Intelligence Hub* tool.
8. Navigate to items, tasks, categories, objectives, and proficiency levels to view the associated attributes.

Related Information

Integrating SAP SuccessFactors Learning with Talent Intelligence Hub [page 477]
Viewing Tasks in Attributes [page 482]
Viewing Programs in Attributes [page 483]
Viewing Items in Attributes [page 482]
Creating an Attribute
Scheduling Attributes Synchronization Process [page 1261]

17.3.1 Viewing Items in Attributes

Review items that are associated to a specific attribute.

Prerequisites

You've upgraded your tenant to Talent Intelligence Hub.

Context

> **Note**
>
> Job Description Manager or Job Profile Builder users can review the items associated with a competency from *Learning Activities* > *Competencies*.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Attributes*.
2. Search and open an attribute.
3. Go to the *Items* tab.

Results

A list of associated items is listed. You can sort by order (ascending or desending) and then by title, item and rating to find the most relevant results.

17.3.2 Viewing Tasks in Attributes

Review the tasks that are associated to a specific attribute.

Prerequisites

You've upgraded your tenant to Talent Intelligence Hub.

Context

> **Note**
>
> Job Description Manager or Job Profile Builder users can review the tasks associated with a competency from *Learning Activities* > *Competencies*.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Attributes*.
2. Search and open an attribute.
3. Go to the *Tasks* tab.

Results

A list of associated tasks is listed. You can sort by order (ascending or desending) and then by ID or description to find the most relevant results.

Related Information

Tasks in Learning Competencies [page 469]

17.3.3 Viewing Programs in Attributes

Review the programs that are associated to a specific attribute.

Prerequisites

You've upgraded your tenant to Talent Intelligence Hub.

Context

> **Note**
>
> Job Description Manager or Job Profile Builder users can review the programs associated with a competency from *Learning Activities* > *Competencies*.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Attributes*.
2. Search and open an attribute.
3. Go to the *Programs* tab.

Results

A list of associated programs is listed. You can sort by order (ascending or desending) and then by ID, title, and rating to find the most relevant results.

Next Steps

If you want to troubleshoot, open a program and review.

Related Information

Reviewing Programs in Competencies [page 474]

17.3.4 Viewing Objectives in Attributes

Review objectives that are associated to a specific attribute.

Prerequisites

You've upgraded your tenant to Talent Intelligence Hub.

Context

> **Note**
>
> Job Description Manager or Job Profile Builder users can review the objectives associated with a competency from *Learning Activities* > *Competencies*.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Attributes*.
2. Search and open an attribute.
3. Choose the *Objectives* tab.
   A list of associated objectives is listed. You can sort by order (ascending or desending) and then by ID, name, and description to find the most relevant results.

Related Information

Viewing the Objectives in Competencies [page 474]

17.3.5 Adding Categories to Attributes

Add categories to attributes so that users can understand how each category can help them gain a new skills or knowledge.

Prerequisites

- You've created categories.
- You've migrated attributes from Talent Intelligence Hub.

Context

> **Note**
>
> Job Description Manager or Job Profile Builder users can add categories to a competency from *Learning Activities* > *Competencies*.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Attributes*.
2. Search and open an attribute.
3. Go to the *Categories* tab.
4. Choose the plus icon.
5. In *Search*, find the categories that you want to add.
6. Select one or more categories, and choose *Add*.

Results

The categories are associated to the attribute. Sort by order (ascending or desending) and then by ID and Description to find the most relevant results.

> **Note**
>
> You can also remove associated categories from the attribute, if necessary.

Related Information

Scheduling Attributes Synchronization Process [page 1261]
Adding Subject Areas to Competencies [page 469]

17.3.6 Viewing Proficiency Levels in Attributes

Look at the proficiency levels that an attribute use in SAP SuccessFactors Learning.

Prerequisites

- You've migrated attributes from Talent Intelligence Hub.
- You've configured the proficiency level scale in Talent Intelligence Hub

Context

If you want to modify the proficiency levels associated to attributes, you can change it **only** from *Manage Talent Intelligence Hub*. It's not supported in SAP SuccessFactors Learning.

> **Note**
>
> Job Description Manager or Job Profile Builder users can review the rating levels associated with a competency from *Learning Activities* > *Competencies*.

Procedure

1. Go to *Learning Administration* > *Learning Activities* > *Attributes*.
2. Search and open an attribute.
3. Go to the *Proficiency Levels* tab.

Related Information

Scheduling Attributes Synchronization Process [page 1261]
Configuring the Proficiency Level Scale

17.4 Generating Attributes Synchronization Job Report

You can generate the *Attributes Synchronization Job* report to review the completion status of each synchronization job and its unprocessed records that let you diagnose and fix synchronization errors.

Prerequisites

You've scheduled *Attributes Synchronization* jobs.

Context

> **Note**
>
> It is important to note that the report does not offer a comprehensive list of all unprocessed records. In the event that the job contains an excessive number of failures, only a subset of the failures are reported..

Additionally, you can view attribute-level data that includes number of synchronized attributes, nonsynchronized attributes, and other statistics associated with synchronization jobs altogether. We recommend you to download the report after the integration between Learning and Talent Intelligence Hub is complete to find better statistics.

Procedure

1. Go to *Learning Administration* > *System Administration* > *Automatic Processes* > *Attributes Synchronization*.
2. Choose *View Results*.

   The *Attributes Synchronization Job* page opens in a new web browser.
3. Review the completion status of each synchronization job.
4. In *Action*, choose the download icon corresponding to the job for which you want to view the complete report, including data related to jobs altogether.

Results

The *Attributes Synchronization Job* report is generated on a new web page.

18 Revising Learning Resources and Metadata

Revise learning resources to keep them current so you can schedule new resources and avoid scheduling resources that you've retired from use.

You usually add resources during implementation and then revise your list periodically. For example, you might open an office in a new geographic region and add a learning facility for the region. Add the region and the facility so that you can schedule classes into it.

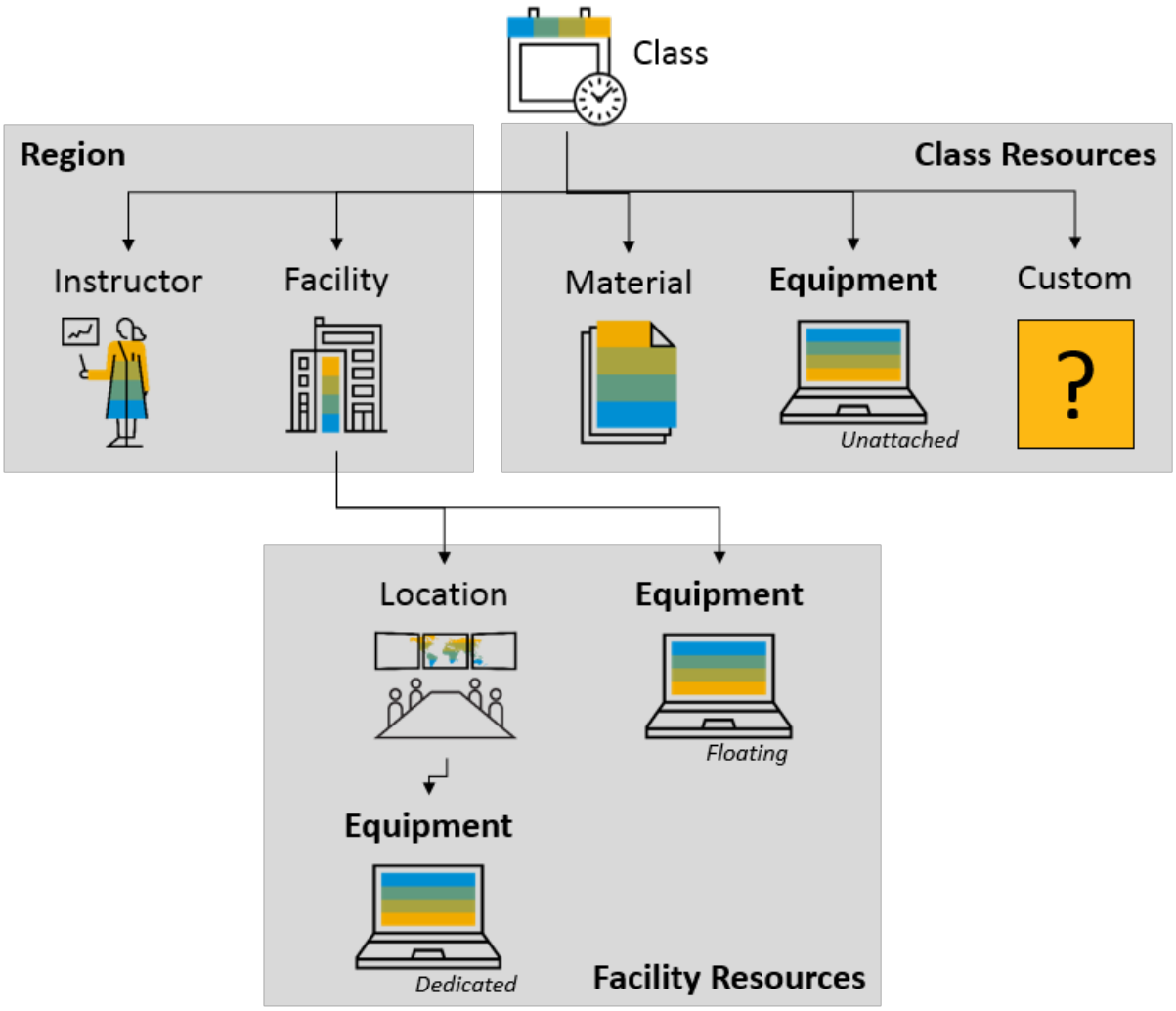
You might also inactivate resources too. For each resource that you can add, you can also inactivate the resource. For example, if an instructor no longer teaches your courses, you can inactivate the instructor so that he or she can't be scheduled.

Metadata is similar to resources. Learning has metadata that helps you, as an administrator, find curricula, courses, and so on. It includes metadata that helps learners find courses. And it includes metadata about your **resources** that help you find, use, and track resources.

18.1 Physical Learning Resources

During initial deployment, you set enumerated lists for your organizations' physical learning assets (classrooms, for example).

A physical resource is any tangible part of your organization's training system. For example, if your organization trains electricians on installing electric meters, you might have a training board with a number of different meters mounted on it so that the electricians can practice installation. Those training boards are a physical resource. The room where they attend training is a physical resource. If the instructor needs video equipment to show an installation in the field, that is a physical resource.



How Physical Resources Fit Together

Track SAP SuccessFactors Learning physical resources to avoid double-booking resources and to track costs. If you create one class in SAP SuccessFactors Learning administration and it uses a room, then that room is removed no longer available for other classes at the same time. Additionally, resources have a cost. Your organization might have to pay to booking a room in a training facility or rent equipment. You can track those costs in SAP SuccessFactors Learning resources.

1. Checking SAP SuccessFactors Learning Equipment Status and Placement [page 491]
   Check the status and placement of equipment to understand where your equipment is and its condition.
2. Checking Training Learning Equipment Status [page 493]
   Identify the status of Learning equipment to see how and when it's being used or repaired.
3. Adding Learning Regions [page 494]
   Add Learning regions so that, when learning instructors schedule courses, they can locate facilities and instructors within a region.
4. Adding Learning Facilities [page 497]
   Add facilities to track the places where you conduct training.
5. Adding Learning Locations [page 513]

Add Learning locations so that you can track where instructors and learners meet in physical space to conduct learning.

6. Adding Learning Equipment Status [page 516]
   Add Learning equipment statuses so that you can flag the state of the equipment (operable, on order, out for repair, and so on).
7. Adding Learning Equipment Types [page 518]
   Add equipment types so that you can categorize equipment (student workstation, projector, lab safety equipment, and so on).
8. Adding Learning Location Types [page 519]
   Add location types so that you can categorize training locations (labs, classrooms, emergency drill sites, simulators, and so on).
9. Adding Learning Training Locations [page 521]
   Add Learning training locations so that instructors can identify the places where instructor-led courses are conducted.
10. Adding Learning Training Equipment [page 528]
    Add Learning training equipment to track its operational status and location for in instructor-led training.
11. Adding Learning Materials [page 539]
    Add Learning materials so that you can track the materials that you need for courses.
12. Custom Training Resources [page 546]
    A custom training resource is something that you use in training and doesn't fit one of the standard categories of training resources.

18.1.1 Checking SAP SuccessFactors Learning Equipment Status and Placement

Check the status and placement of equipment to understand where your equipment is and its condition.

Context

To administer a large training organization, you need to assure your instructors and training participants that they have the equipment they need when they start a course. The equipment needs to be operable and it needs to be in the right place. To check that the equipment is operable, you look at the **status** of the equipment. To check its placement, you look at the facility or location of the equipment.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Reports*.
2. Find the *Equipment Data* report and launch it.
3. Type a title, header, and footer, and then select the destination and format.

The title, header, footer, and so on control the look and feel of the report but not the data about the equipment. Depending on how you want to present the report, you might make different selections, but if you just want to check the status of the equipment, you can ignore the fields.

4. In *Equipment*, click the filter button to look up the equipment you want to check.
5. Click *Add/Remove Criteria* to get the right criteria for your search.

   A common search looks for all equipment of a type to see where that equipment is placed and what status it has. In *Add/Remove Criteria*, add *Equipment Type*.

   > ⚠ Caution
   >
   > If you want to find all equipment at a facility, you must search for equipment at the facility and also for equipment at all the locations in the facility. In SAP SuccessFactors Learning you can associate equipment with the facility or with individual locations in the facility. When you search for all equipment in a facility, the Equipment Data report does **not** automatically find all equipment in the locations in the facility.

6. Use the criteria to filter in all equipment that interests you.

   You might want to see all equipment of type "Computer". In Equipment Type, type **`Computer`**.
7. Click *Submit Criteria* to submit the filter.
8. Click *Run Report*.

Results

In the report, you can see placement and status of the equipment. To see the status, look at the *Status* field for each piece of equipment. To see the placement, look at *Location* and *Facility*.

- If the equipment has a location but not a facility, then it is a dedicated piece of equipment that is always in the location and should not be moved around the facility.
- If the equipment has a facility but not a location, then it is a floating piece of equipment that can be moved from location to location in a facility.
- If the equipment has both a facility and a location, then it could be normally dedicated to a location but also available to be moved to different parts of the facility.
- If the equipment has neither a facility nor a location, then it is an unattached item, which is usually shipped to the facility for training when a class occurs.

Next Steps

To investigate the equipment further, look at the equipment ID in the *Equipment* field. Then go to *References* > *Physical Resources* > *Equipment* and look up the equipment record.

Task overview: Physical Learning Resources [page 489]

Next task: Checking Training Learning Equipment Status [page 493]

Related Information

Learning Equipment Placement [page 531]

18.1.2 Checking Training Learning Equipment Status

Identify the status of Learning equipment to see how and when it's being used or repaired.

Context

You use equipment repeatedly, so you might want to check the courses that are using it. You might also want to check its status to see if it's being repaired or if it has been removed from circulation.

> ⚠ Caution
>
> This process relies on someone physically inspecting the equipment and then changing its status markers in Learning Administration. To check the exact status of the equipment, check with the facility manager.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Equipment*.
2. Find the training equipment that you want to check and open it.
3. Go to *Summary* and look in *Equipment Status*.

   Equipment status is unique to your organization, but most organizations have status values that indicate things like repair, in service, or inoperable. The status is the fastest way to see trouble with your equipment, but it relies on another administrator switching the status.
4. Also in *Summary*, look at *Can Be Scheduled*.

   If the value of *Can Be Scheduled* is *Yes*, then chances are good that the equipment is operable because it's available for use in a course.
5. Go to *Classes* and look at where the equipment is being used.

   If the equipment is being scheduled for future classes (courses), then chances are that it's operable. However, if the equipment has a resource block, then chances are something is wrong with it. A resource block prevents the equipment from being attached to a course, so it could be that an administrator blocked the equipment as a resource but forgot to switch the status.

Next Steps

If you're still unsure about the status of the equipment, you can check with the facility manager where the equipment is located.

Task overview: Physical Learning Resources [page 489]

Previous task: Checking SAP SuccessFactors Learning Equipment Status and Placement [page 491]

Next task: Adding Learning Regions [page 494]

18.1.3 Adding Learning Regions

Add Learning regions so that, when learning instructors schedule courses, they can locate facilities and instructors within a region.

Context

When your company conducts physical training (training that takes place with an instructor in a location), your instructors want to find training facilities in a location that is close to the users who need the training and also find instructors that are close to the facility. Your users want to find courses that are close to their location. You add regions to help your users and learning administrators.

A region is geographic border that makes sense to your business but not might make sense to another business. For example, you might create three regions in Europe but only one in China because you have more employees in Europe, so more facilities in Europe, but in China, all of your employees might be in one location.

Procedure

1. Go to Learning Administration, and then go to *References* > *Geography* > *Regions*.
2. Choose *Add New*.
3. Type a region ID and a description that help other administrators identify the region, and then choose *Add*.

   Because regions are unique to your business, descriptions are more important. Your regions might not follow well-understood national borders. A good description of a region saves you time later when other administrators are trying to understand how your regions are defined.
4. If you have already added facilities to the system and you want to assign them to a region now, go to *Facilities* and choose *add one or more from list*.
5. If you have already added instructors to the system and you want to assign them to a region now, go to *Instructors* and choose *add one or more from list*.

   Learning Regions [page 495]

Learning regions are geographic centers that make sense for your physical learning environment: they are the places where your facilities are located.

Why Regions Matter to Instructors and your Physical Learning Environment [page 496]
Put instructors into regions so that when you want to find an instructor, you can find one in a region where your users can easily attend the training.

Why Regions Matter to Facilities and Your Physical Learning Environment [page 496]
Put facilities into regions so that when you want to find a place to hold your courses, you can find one in a region where your users can easily attend the training.

Task overview: Physical Learning Resources [page 489]

Previous task: Checking Training Learning Equipment Status [page 493]

Next task: Adding Learning Facilities [page 497]

18.1.3.1 Learning Regions

Learning regions are geographic centers that make sense for your physical learning environment: they are the places where your facilities are located.

Add regions as part of implementing and maintaining your learning facilities. To define your regions, think about where your training facilities are located. For example, if you have training centers (facilities) in Atlanta, New York, Berlin, Johannesburg, Beijing, and Singapore, those cities are your regions. Regions allow you to schedule instructors and facilities into courses at your facilities and recommend to users the closes regional facility.

The main benefit of regions is as a filter in search. Regions are an attribute that administrators and end users can use as a filter to restrict search results. It is also a way to limit reporting data (to see, for example, the equipment in and around Atlanta). For example, when administrators needs to identify the instructor for an agenda of a class, they can use the *Region* criteria to restrict the results of the instructor search to the region where the agendat of the class is provided.

Regions are **not** the best way to assign learning with assignment profiles. Assignment profiles most often assign required courses. Required courses are most often online, **not** instructor led in a classroom. Because regions are based on your training facility locations, and therefore for instructor led courses, most customers use address fields like city, postal code, or country for assignment profiles when they want to assign courses based on users' geographic locations.

> **Note**
>
> When you associate an instructor with a region, the system does not prevent administrators from scheduling those instructors for offerings that take place in facilities outside of the region that is associated with the instructor.

Parent topic: Adding Learning Regions [page 494]

Related Information

Why Regions Matter to Instructors and your Physical Learning Environment [page 496]
Why Regions Matter to Facilities and Your Physical Learning Environment [page 496]

18.1.3.2 Why Regions Matter to Instructors and your Physical Learning Environment

Put instructors into regions so that when you want to find an instructor, you can find one in a region where your users can easily attend the training.

Add instructors to regions as part of implementing and maintaining your physical learning environment. By adding an instructor to a region, you place the instructor within a geography that your organization recognizes. For example, you might divide your regions by cities where you have a presence: Atlanta, New York, Berlin, Johannesburg, Beijing, and Mumbai. You understand that you can schedule instructors into courses near or in those cities, so you associate instructors to the regions (the area around the city).

Later, when a training administrator is scheduling training near those cities, they can look up the instructors by region. Furthermore, users can search for specific courses being taught by instructors in their own region (a user near Beijing, for example, can search for training in the Beijing region).

Add instructors to regions in SAP SuccessFactors Learning by going to *References* > *Geography* > *Regions* > *Instructors*. Manage facilities in *References* > *Geography* > *Regions* > *Facilities*.

Parent topic: Adding Learning Regions [page 494]

Related Information

Learning Regions [page 495]
Why Regions Matter to Facilities and Your Physical Learning Environment [page 496]

18.1.3.3 Why Regions Matter to Facilities and Your Physical Learning Environment

Put facilities into regions so that when you want to find a place to hold your courses, you can find one in a region where your users can easily attend the training.

Add facilities to regions as part of implementing and maintaining your physical learning environment. By adding a facility to a region, you place the training facility within a geography that your organization recognizes. For example, you might divide your regions by cities where you have a presence: Atlanta, New York, Berlin, Johannesburg, Beijing, and Mumbai. You understand that you can schedule courses in facilities near or in those cities, so you associate facilities to the regions (the area around the city).

Later, when a training administrator is scheduling training near those cities, he or she can look up the facilities by region. Furthermore, users can search for training in their own region (a user near Beijing, for example, can search for training in the Beijing region.

Add facilities to regions in SAP SuccessFactors Learning by going to *References* > *Geography* > *Regions* > *Facilities*. Manage facilities in *References* > *Physical Resources* > *Facilities*.

Parent topic: Adding Learning Regions [page 494]

Related Information

Learning Regions [page 495]
Why Regions Matter to Instructors and your Physical Learning Environment [page 496]

18.1.4 Adding Learning Facilities

Add facilities to track the places where you conduct training.

Prerequisites

Before you can create facilities, you must:

- Add regions so that you can locate the facility into how you define your regional training. This helps users find training close to them and helps you find instructors to conduct training and find facilities that can hold the training.
- Add schedules for the facilities. Schedules include holidays when facilities are closed and the work week of the facility (days of the week when a facility is typically open, like Monday through Saturday or Monday through Friday).
- If you want to track costs, add currencies and cost names.

We also recommend that you gather this information for each facility:

- Summary information, which is the basic configuration of the facility.
- Contact information, which is how you contact someone at the facility.
- Cost information, which is what it costs you to hold training in the facility. Not all companies track training costs.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Facilities*.

2. Click *Add New*
3. Enter the summary information that SAP SuccessFactors requests to start the record.
4. Review the summary information in *Summary*, and if you need to make any changes, click *Apply Changes*.
5. Enter the contact information that you gathered in *Contact*, and then click *Apply Changes*.
6. If you are tracking costs, enter the cost information in *Base Cost*, and then click *Apply Changes*.

Next Steps

Add the locations that are inside the facility (for example, classroom locations inside the facility building) and equipment (for example, laptops or lab equipment assigned to a facility).

Adding Regular Schedules for Learning Training Facilities [page 499]
: Add regular schedules for Learning training facilities so that learning administrators know the hours and days when they can schedule courses in the facility.

Copying Learning Facilities [page 501]
: Copy Learning facilities to close a facility and move everything to the new facility.

Placing Learning Facilities in a Region [page 502]
: Place facilities in regions to set the facilities' geographic locations so that users and other administrators can find the closest training events.

Learning Facility Contact Information [page 503]
: Facility contact information is the mailing, telephone, and personnel contact information for the facility.

How Learning Facilities are Divided into Locations [page 504]
: Locations are individual places where training takes place inside the larger facility.

Example Facilities Hours Map [page 505]
: Create a map of holidays, work weeks, and facilities to set the scheduled hours of your facility.

Learning Facility Summary Fields [page 506]
: Use facility summary fields to find and set basic information about facilities where you conduct training.

Learning Facility Contact Information Fields [page 508]
: These fields plan how you can contact a facility manager, to ship materials to the facility, or to locate the facility on a map for users and instructors.

Learning Facility Base Cost Fields [page 509]
: Add a base cost to a facility so that you can address the cost of training facilities as part of conducting courses.

Learning Facilities [page 510]
: A learning facility is the organizing unit of SAP SuccessFactors Learning physical resources because it is the container for locations (rooms, labs, and so on) and equipment.

SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
: An ad hoc facility is a place where you hold training one time and typically do not return to.

SAP SuccessFactors Learning External Facilities [page 512]
: External facilities are **not** owned by your company.

Task overview: Physical Learning Resources [page 489]

Previous task: Adding Learning Regions [page 494]

Next task: Adding Learning Locations [page 513]

Related Information

Training Equipment [page 538]
Learning Locations [page 527]
Adding Learning Location Types [page 519]
Adding Learning Training Locations [page 521]
Adding Learning Training Equipment [page 528]

18.1.4.1 Adding Regular Schedules for Learning Training Facilities

Add regular schedules for Learning training facilities so that learning administrators know the hours and days when they can schedule courses in the facility.

Prerequisites

Add facilities, holidays, and holiday profiles from your facility hours map.

Create a facility hours map. The facility hours map helps you understand when the facilities should be open over the time period that you want to manage.

Context

Your training facilities are open and available to hold courses during only some hours of the day and week. For example, a facility might be open Monday through Saturday but closed on Sunday. Your facilities could also be closed to observe holidays. So that your learning administrators schedule courses for facilities when the facilities are open, you need to define when they are open and when they are closed. Define open and closed with work week profiles and holiday profiles.

Procedure

1. Go to Learning Administration, and then go to *References* > *Calendars and Time* > *Work Week Profiles*.
2. For each work week profile in your facility hours map, click *Add New* to create a new work week profile.

   Select the days in the work week profile and give the profile a description that helps other administrators understand it.
3. Go to *References* > *Physical Resources* > *Facilities* and look up each facility in your map and open it.
   a. Select the holiday profile for the facility in *Holiday Profile*.
   b. Select the time zone for the facility in *Time Zone*
   c. Select the work week profile for the facility in *Work Week*.
   d. **Optional:** At this time, you can also select the region of the facility in *Region*. Selecting a region helps schedulers find facilities and instructors in the same region as the facility.
   e. **Optional:** Add comments to describe the facility to other administrators.
   f. Click *Apply Changes*.

Next Steps

Review your facility hours periodically to look for changes in the schedule. You should at least review the hours annually when your organization publishes new holidays.

Task overview: Adding Learning Facilities [page 497]

Related Information

Copying Learning Facilities [page 501]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]
Learning Facility Contact Information Fields [page 508]
Learning Facility Base Cost Fields [page 509]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]
Example Facilities Hours Map [page 505]

18.1.4.2 Copying Learning Facilities

Copy Learning facilities to close a facility and move everything to the new facility.

Context

Copy a facility when you want to close one facility and move its equipment, locations, and classes to a new facility. For example, if you're moving offices from one location to another, you can click *Copy Facility* to leave the old facility in the system for reporting purposes but move the equipment, future classes, and so on, to the new facility.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Facilities*.
2. Find the facility you want to copy and open it.
3. Click *Copy Facility* and decide what you want to move from the old facility to the new one.

If you select...	Then SAP SuccessFactors...
Update equipment relationships	Reassigns the equipment from the old facility to the new facility.
Update location relationships	Reassigns the locations (rooms) of the old facility to the new facility.
Update scheduled offering relationships	Reassigns any scheduled offering segments from the old facility to the new facility.

4. Click *Copy*.

Task overview: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]
Learning Facility Contact Information Fields [page 508]

Learning Facility Base Cost Fields [page 509]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]

18.1.4.3 Placing Learning Facilities in a Region

Place facilities in regions to set the facilities' geographic locations so that users and other administrators can find the closest training events.

Prerequisites

Configure the regions for your organization in *References* > *Geography* > *Countries/Regions*.

Context

When you add a region to a facility, you allow other administrators and users to restrict search results and reporting data to specific regions. For example, when administrators needs to identify the instructor for a segment of a scheduled offering, they can use the *Region* criteria to restrict the results of the instructor search to the region where the segment of the scheduled offering is provided. When users search for instructor-led learning items in *My Region*, the filter retrieves only the classes in facilities associated to the selected users' regions.

> → Tip
>
> If you want to associate many facilities with one region, you can do that in Learning by going to *References* > *Geography* > *Countries/Regions*, finding the region that you want to associate to the facilities, and then clicking *Facilities*.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Facilities*.
2. Find the facility that needs an associated region and edit the facility.
3. Select the region in *Region*.

Next Steps

If you also track instructors, consider assigning a region to the instructors so that you can match users, facilities, and also instructors.

Task overview: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]
Learning Facility Contact Information Fields [page 508]
Learning Facility Base Cost Fields [page 509]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]
Learning Regions [page 495]
Why Regions Matter to Facilities and Your Physical Learning Environment [page 496]
Learning Facilities [page 510]

18.1.4.4 Learning Facility Contact Information

Facility contact information is the mailing, telephone, and personnel contact information for the facility.

If you need to contact someone in charge of the facility or if you need to ship materials to the facility, you need to know the facility contact information. Contact information also helps registered users find the facility.

To check a facility's contact information go to *References* > *Physical Resources* > *Facilities*, find the facility, open it, and then click *Contact*.

Parent topic: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]

Placing Learning Facilities in a Region [page 502]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]
Learning Facility Contact Information Fields [page 508]
Learning Facility Base Cost Fields [page 509]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]
Finding a SAP SuccessFactors Learning Facility Manager [page 203]
Finding a SAP SuccessFactors Learning Facility Manager [page 203]

18.1.4.5 How Learning Facilities are Divided into Locations

Locations are individual places where training takes place inside the larger facility.

A facility has one or more location. Each location is a place where training takes place in the facility. For example, a facility can be a building and the locations can be training rooms and labs inside the building. Or the facility can be a hospital campus, and the locations can be individual buildings in the campus. How you define facilities and locations as physical space depends on your organization.

You can see the locations in a facility by going to *References* > *Physical Resources* > *Facilities*.

Parent topic: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]
Learning Facility Contact Information Fields [page 508]
Learning Facility Base Cost Fields [page 509]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]
Learning Locations [page 527]
Learning Location Types [page 520]
Learning Location Types [page 520]
Learning Locations [page 527]

18.1.4.6 Example Facilities Hours Map

Create a map of holidays, work weeks, and facilities to set the scheduled hours of your facility.

Example Holiday Map

A holiday map is all the days when you expect any facility to be closed for a holiday in any country or region. You map holidays so that you can look for commonalities to create holiday profiles. In most cases, a holiday profile matches a country: all holidays in England, for example, or all holidays in China. You can write all holidays in rows in the first column and create additional columns for region or nation to show a holiday profile.

For example: after entering the holidays of (Solar) New Year's Day, Epiphany, Lunar New Year's Day, Labor Day (US), Bank Holiday, and Labor Day (China), you can look for commonalities. You see that England, Germany, and the United States share Solar New Year's Day, but only your German facilities have a holiday for epiphany. You can begin to build profiles to the right by adding columns. When you are finished, you might have a holidays map that looks like the following.

Example Holiday Map

Holiday	English Holiday Profile	Chinese Holiday Profile	German Holiday Profile	U.S. Holiday Profile
New Year's Day	X		X	X
Epiphany			X	
Lunar New Year		X		
Labor Day (U.S.)				X
Bank Holiday	X			
Labor Day (China)		X		

Example Facility Hours Map

After you create holiday map, combine the profiles you find with work week profiles to make a facility hours map. A facility hours map is all of the days that a facility is open and is closed so that training is scheduled when the facility is open.

Parent topic: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Learning Facility Summary Fields [page 506]
Learning Facility Contact Information Fields [page 508]
Learning Facility Base Cost Fields [page 509]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]

18.1.4.7 Learning Facility Summary Fields

Use facility summary fields to find and set basic information about facilities where you conduct training.

In *References* > *Physical Resources* > *Facilities* > *Summary* , you can find basic information about the facility that you select, for example, when the facility is closed for holidays, what days of the week are work days, in what region the facility is located, and so on.

This Field...	...Is used as follows
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
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.
Region	The geographic region of the facility as you've defined the regions for your business. Importantly, you also associate instructors with regions so that you can schedule training with an instructor and in a facility that is close to users.

This Field...	...Is used as follows
Holiday Profile	The holiday profile that the facility is associated with. A holiday profile defines the days when the facility is closed and, for example, nothing should be scheduled into locations at the facility. The facility follows the holidays in its holiday profile.
Time Zone	Time zones of the facility help you manage worldwide facilities. SAP SuccessFactors Learning uses time zones to show course start and end times in local time: the time **in the location** of learners when attending training. To calculate local time, Learning needs time zones for all applicable parts of the schedule and the user. To help you schedule, you should set the time zones too. For example, you set time zones for the facility where the course takes place, the time zone of the class, and the time zone of the user.
Work Week	The work week profile associated with the facility. The facility follows the work week outlined in its work week profile.
External Facility	This check box, when selected, indicates that the facility isn't own by your organization. You can, for example, set up external facilities to be any facility you rent from a third party.
Copy Facility	Click this button to copy the facility.

Parent topic: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Contact Information Fields [page 508]
Learning Facility Base Cost Fields [page 509]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]

18.1.4.8 Learning Facility Contact Information Fields

These fields plan how you can contact a facility manager, to ship materials to the facility, or to locate the facility on a map for users and instructors.

Edit facility contact information in Learning Administration: *References* > *Physical Resources* > *Facilities* > *Contact*.

Facility Contact Information

Field	Description
Contact	This is the contact name of a facility manager or someone who you call at the facility if you need to speak to someone.
Address	This is the street address of the facility.
City	This is the city where the facility is located.
State/Province	This is the state or province where the facility is located.
Country	This is the country where the facility is located.
Phone Number	This is the phone number that you can call if you need to speak to someone in charge of the facility.
Fax Number	This is the fax number at the facility that you can fax documents to.
Email Address	This is the e-mail address of the facility contact.

Parent topic: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]
Learning Facility Base Cost Fields [page 509]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]
Learning Regions [page 495]
Why Regions Matter to Facilities and Your Physical Learning Environment [page 496]

18.1.4.9 Learning Facility Base Cost Fields

Add a base cost to a facility so that you can address the cost of training facilities as part of conducting courses.

Set the base cost for facilities in SAP SuccessFactors Learning administration by going to *References* > *Physical Resources* > *Facilities*. Find the facility, edit it, and then go to *Base Cost*.

This Field...	...Is used as follows
Amount	The baseline cost to use this facility. For example, if you have an external facility, and you agree with its manager that each training session in the facility costs $2000 to rent per day. You set $2000 as the amount and day as the unit of measure. When you schedule a class into this facility for two days, for example, the class inherits a facility cost of $4000. To serve multiple markets, you can use the system to price the item, class, or other learning resources in multiple currencies. Click *Add More Currencies* to select additional currencies and enter the price, for example, of the item or class in each additional currency. The system prompts you to propagate the price of the item into the additional currencies.
Unit of Measure	The unit of measure to which the amount is to be charged. This usually in the form of time or person. For example per day, per hour, per year, and so on.
Cost Name	The name of the cost to add to the base cost.
Custom Cost Calculator	You can add base costs for the facility by entering either an amount and unit of measure or by selecting an existing cost name. You can edit your base cost to apply it to current and future learning; past, current, and future learning; or selected learning.

Parent topic: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]

Learning Facility Contact Information Fields [page 508]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]

18.1.4.10 Learning Facilities

A learning facility is the organizing unit of SAP SuccessFactors Learning physical resources because it is the container for locations (rooms, labs, and so on) and equipment.

Although each company defines its facilities differently, facilities are the organizing unit of physical resources because they typically **contain** other physical resources. For example, you might define a facility as a building with many rooms. You might have a person who is responsible for maintaining the rooms in the building, the equipment in the building, and the consumable materials in the building. You probably don't move training equipment (for example computers) outside of the facility (but you might move equipment from room to room inside of the building).

> **Note**
>
> Although SAP SuccessFactors Learning is flexible enough to assign equipment directly to scheduled offerings, chances are that your equipment is located in a facility.

- Facilities are assigned to a region so that you match instructors to facilities and so that users can find training facilities in their geographic areas.
- Each facility (for example, a building) is divided into locations (for example, rooms in the building).
- Equipment can be assigned directly to facility (for example, a projector that you can move from room to room) and assigned to a location (for example, a computer that is always in a classroom).

Parent topic: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]
Learning Facility Contact Information Fields [page 508]
Learning Facility Base Cost Fields [page 509]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]
SAP SuccessFactors Learning External Facilities [page 512]

Learning Locations [page 527]
Learning Regions [page 495]

18.1.4.11 SAP SuccessFactors Learning Ad Hoc Facilities

An ad hoc facility is a place where you hold training one time and typically do not return to.

Learning administrators can create ad hoc facilities when the standard facilities in *References* > *Physical Resources* > *Facilities* do not meet their needs and they are looking for space to use one time. For example, if you are flying salespeople to a central location for sales training, you book them in a single hotel at a resort, and you want to use the conference rooms in the resort for training, your learning administrator can add the resort as ad hoc training facility. In this case, the administrator doesn't want to add the resort as a standard facility because chances are that the sales training at this place is a one-time event.

By adding an ad hoc facility, you can track it without worrying about referenced values. For example, you might need to mail training materials to the resort, so you want to know its address and a person's contact information. By entering this information, you help other administrators manage the event. However, you don't need to set up a work week profile or a holiday profile for the resort conference rooms: you know they are open for the training because you are booking them through the resort. The referenced values of work week and holiday profile, therefore, do not exist in ad hoc facilities.

By definition, ad hoc facilities don't exist until you create a scheduled offering (a course scheduled at a particular time and location). You create them when you create a scheduled offering. When adding a facility, you see the option to create an ad hoc facility.

> → Tip
>
> If you find yourself creating the same ad hoc facility multiple times, you should consider adding it as a facility in *References* > *Physical Resources* > *Facilities*. By doing so, you have greater control over the management of your data.

Parent topic: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]
Learning Facility Contact Information Fields [page 508]
Learning Facility Base Cost Fields [page 509]

Learning Facilities [page 510]
SAP SuccessFactors Learning External Facilities [page 512]

18.1.4.12 SAP SuccessFactors Learning External Facilities

External facilities are **not** owned by your company.

Many companies outsource their training facilities. For example, you might have an office outside of your headquarters campus and that office does not have large meeting rooms or space that isn't well suited for training courses. You might, however, be able to rent training rooms from the building management company where your remote office is located. In this case, the training room that you rent (or that you have access to) is an external training facility.

Importantly, you can do everything with an external facility that you can do with an internal facility: you can track costs, you can assign equipment, and you can set locations. But when you are finding facilities for training, you want to know the difference between an internal facility and an external facility.

You configure a facility to be external by selecting its *External Facility* check box.

Parent topic: Adding Learning Facilities [page 497]

Related Information

Adding Regular Schedules for Learning Training Facilities [page 499]
Copying Learning Facilities [page 501]
Placing Learning Facilities in a Region [page 502]
Learning Facility Contact Information [page 503]
How Learning Facilities are Divided into Locations [page 504]
Example Facilities Hours Map [page 505]
Learning Facility Summary Fields [page 506]
Learning Facility Contact Information Fields [page 508]
Learning Facility Base Cost Fields [page 509]
Learning Facilities [page 510]
SAP SuccessFactors Learning Ad Hoc Facilities [page 511]

18.1.5 Adding Learning Locations

Add Learning locations so that you can track where instructors and learners meet in physical space to conduct learning.

Prerequisites

All locations are in a facility, which contains important information like contact details, and all locations have a type, which defines them by their use (for example, lab or classroom). Before you create a facility, create a location.

Context

You typically create learning locations during implementation and then update them periodically.

Learning locations are **physical**, like a classroom or a lab. If you are using virtual training rooms, do **not** create a learning location.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Physical Resources* > *Locations*.
2. Click *Add New*.
3. In *Add New Location*, type the basic information about the location.

Field	Description
Location ID	Many companies or organizations use a naming scheme for their ID system. If you are using a naming scheme, be sure to follow it.
Description	Type a description that helps you understand the location. Companies often have a location description, like 10.100 (for building 10, room 100). You can enter that into the description, for exmaple.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Active	When a record is inactive, most of the system does not include that record in searches or reports. Some searches

Field	Description
	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.
Location Type	Select a location type from among the types you defined.
Facility	The facility is typically the building of the location, which is typically the room inside the building (the facility).
Max Capacity	Type the threshold for registration in an class that is scheduled to take place at this location. For example, the most local governments set a capacity limit on rooms for fire safety. This is the limit..
Contact Name	You often don't need a contact name for a room (a location) because most communication goes to the facility manager. Locations are in a facility.
Contact Email	You often don't need a contact email for a room (a location) because most communication goes to the facility manager. Locations are in a facility.
Comments	Comments are any notes you have about the room. For example, if the room is difficult to access, you might write that in the comments.

4. Click *Add*.

> **Note**
>
> Most customers can stop here. If you are using commerce features to track costs, then add the base costs and additional costs.

The location is now in a facility and you can schedule courses into it.

5. Go to *Base Costs*.

Field	Description
Amount	The baseline cost to use this location. For example, if a location can cost $1000 to rent per day. You set $1000 as the amount and day as the unit of measure. When you schedule a class into this location for two days, for example, the class inherits a location cost of $2000. The total cost value for the base cost. To serve multiple markets, you can use the system to price the item, class, or other learning resources in multiple currencies. Click *Add More Currencies* to select more currencies and enter the price, for example, of the item or class in each additional currency. The system prompts you to propagate the price of the item into the additional currencies.

Field	Description
Unit of Measure	The unit of measure to which the amount is to be charged. The unit of measure is usually in the form of time or person. For example per day, hour, year.
Cost Name	The name of the cost to add to the base cost.
Custom Cost Calculator	You can add base costs for the location by entering either an amount and unit of measure or by selecting an existing cost name. You can edit your base cost to apply it to current and future learning; past, current, and future learning; or selected learning. Most customers do **not** use custom cost calculators.

> **Note**
>
> For most customers who use Commerce features, the based costs are enough.

6. Click *Apply Changes*
7. Go to *Additional Costs*.

Field	Description
Amount	The additional cost to use the location. For example, if the location includes a $500 cleaning cost that is not per-day but is a one-time cost at the end of training, you can add it in *Amount*. The base cost for the location might be $1000 per day, so over two days, the total cost of the location is $2500: $2000 per day plus $500 extra cost for cleaning. To serve multiple markets, you can use the system to price the item, class, or other learning resources in multiple currencies. Simply click *Add More Currencies* to select more currencies and enter the price, for example, of the item or class in each additional currency. The system prompts you to indicate that you want to propagate the price of the item into the additional currencies. Click *Yes* to propagate the price in the new currency.
Unit of Measure	The unit of measure to which the amount is to be charged. The unit is usually in the form of time or person. For example: per day, hour, year, and so on.
Cost Name	The name of the cost to add to the base cost.
Custom Cost Calculator	You can add base costs for the location by entering either an amount and unit of measure or by selecting an existing cost name. You can edit your base cost to apply it to current

Field	Description
	and future learning; past, current, and future learning; or selected learning. Most customers do **not** use custom cost calculators.

8. Click *Apply Changes*.

Task overview: Physical Learning Resources [page 489]

Previous task: Adding Learning Facilities [page 497]

Next task: Adding Learning Equipment Status [page 516]

18.1.6 Adding Learning Equipment Status

Add Learning equipment statuses so that you can flag the state of the equipment (operable, on order, out for repair, and so on).

Context

You create your own equipment statuses to create your own unique equipment states. For example, your equipment states can be as simple as operable and inoperable. The equipment is either working so it can be scheduled for training or it isn't working. Or, if you have a service level agreement (SLA) to fix or replace in one week, then you might have a status that is "Out for Repair - Under SLA."

Procedure

1. Go to Learning Administration and then go to *References* > *Physical Resources* > *Equipment Status*.
2. For each equipment status that you need for your business case, click *Add New*.
3. Type an ID and a description that help other administrators make sense of the status.

   When you write the description, write it for someone in charge of profit and loss for training. For example, if you contract with a third party to maintain your equipment, people high in your training organization or company might want to see the equipment status over a period of time. A good description helps them make sense of the report.
4. If the status indicates that the equipment is operable and can be used in training, select *Can Be Scheduled*.

   If you have two statuses, operable and inoperable, then select *Can Be Scheduled* for the operable status and clear it for the inoperable status. As a result of this configuration, equipment in the operable status can be added to a class but equipment in the inoperable status can't be added.

5. Click *Add*.

Task overview: Physical Learning Resources [page 489]

Previous task: Adding Learning Locations [page 513]

Next task: Adding Learning Equipment Types [page 518]

Related Information

Training Equipment [page 538]
Checking SAP SuccessFactors Learning Equipment Status and Placement [page 491]

18.1.6.1 Learning Equipment Status

Learning equipment status is the condition of equipment that you use for training (for example, operational or under repair).

When you schedule training, you want to know that equipment is in good condition for the training event. For example, you want to know if all the computers in a computer lab are operational. To check the status of equipment, you can run the Equipment Status report, but you first need to define the status values so that they make sense for your business.

The most important attribute of an equipment status is *Can Be Scheduled*. If it's true, then equipment in the status is available for use classes (courses). For example, you might say equipment in a status of "Operational" can be scheduled but equipment in status "Inoperative" can't be scheduled. Inoperative equipment, therefore, can't be added to a scheduled offering.

> **Note**
>
> In most cases, you define your equipment status values at implementation and review them periodically.

18.1.7 Adding Learning Equipment Types

Add equipment types so that you can categorize equipment (student workstation, projector, lab safety equipment, and so on).

Context

When reporting on your equipment or scheduling the equipment, you need to know the kind of equipment. For example, you need to know if the equipment is learner workstation, projector, lab safety equipment, or another type of equipment. Add an equipment type for each category of training equipment in your business.

> → Tip
>
> If you want to create many equipment types in bulk, you can import them.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Equipment Types*.
2. For each equipment type that you need for your business case, click *Add New*.
3. Type an ID and a description that help other administrators make sense of the type.

   When you write the description, write it for someone in charge of profit and loss for training. For example, if you contract with a third party to maintain your equipment, people high in your training organization or company might want to see the equipment status and the equipment type in that status over a period of time. A good description helps them make sense of the report.
4. Click *Add*.

Task overview: Physical Learning Resources [page 489]

Previous task: Adding Learning Equipment Status [page 516]

Next task: Adding Learning Location Types [page 519]

Related Information

Training Equipment [page 538]

18.1.7.1 Learning Equipment Types

Equipment types categorize training equipment.

When administrator manage training equipment, they need to know its category. For example, they want to see the difference between safety equipment, classroom equipment, and lab equipment. If there is a problem with safety equipment, that is a higher priority than problems with classroom equipment.

Your equipment types are unique to your business. You typically create them at implementation time and then review them periodically.

18.1.8 Adding Learning Location Types

Add location types so that you can categorize training locations (labs, classrooms, emergency drill sites, simulators, and so on).

Context

When reporting on your locations or when scheduling courses into a location, you need to know the kind of location you are seeing. For example, you need to know if the locations are labs, classrooms, emergency drill sites, simulators, or some other type of location. When a learning administrator schedules classroom training, the learning administrator wants to look for classroom locations to hold the training. Add a location type for each category of training location in your business.

> → Tip
>
> If you want to create many location types in bulk, you can import them.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *References* > *Physical Resources* > *Location Types*.
2. For each location type that you need for your business case, click *Add New*.
3. Type an ID and a description that help other administrators make sense of the type.

   When you write the description, write it for the learning administrator who is scheduling training. Help the learning administrators understand if they are scheduling into a classroom or a lab, for example.
4. Click *Add*.

Task overview: Physical Learning Resources [page 489]

Previous task: Adding Learning Equipment Types [page 518]

Next task: Adding Learning Training Locations [page 521]

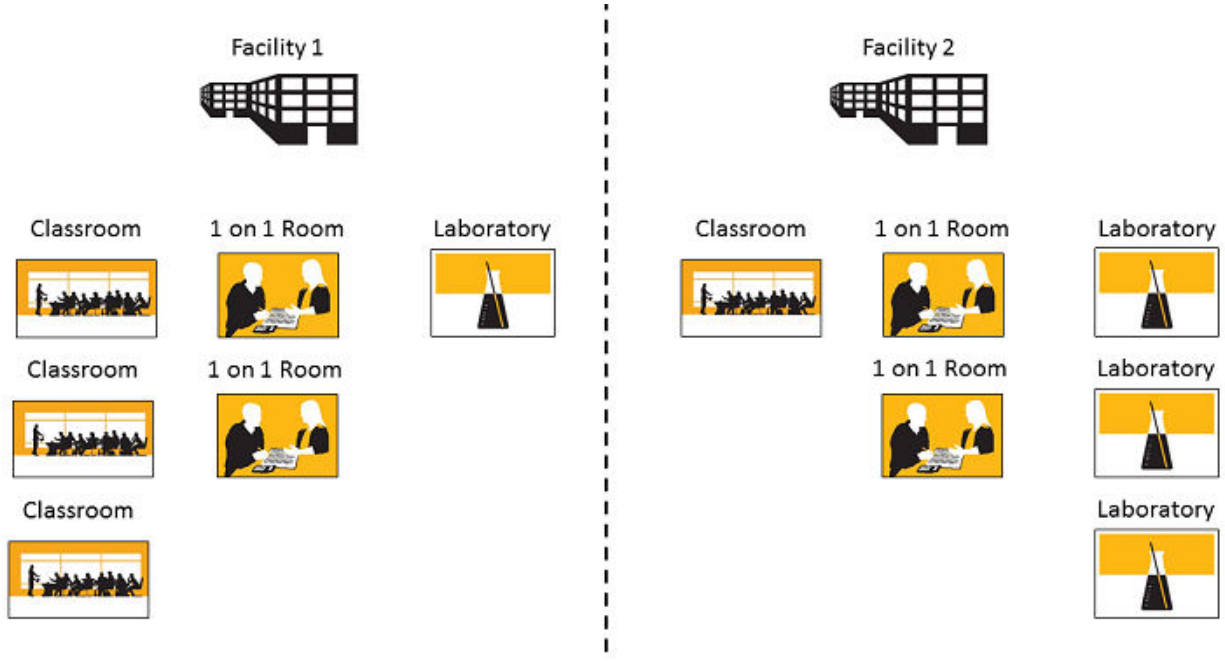
Related Information

Learning Location Types [page 520]
Learning Locations [page 527]
Importing SAP SuccessFactors Learning References [page 1292]

18.1.8.1 Learning Location Types

Learning location types are categories of training locations.

Set up location types to define the categories of learning space you have in different training facilities. For example, two training facilities can each have six training location (two different buildings at two different addresses each have six rooms where training can take place). But the six rooms can be very different. One facility might have mostly classrooms with just a few labs and another might be mostly labs with just a few classrooms. The distinction between a lab and a classroom is location type.



Location Type Example

You typically configure location types during the implementation phase and revisit them periodically.

18.1.9 Adding Learning Training Locations

Add Learning training locations so that instructors can identify the places where instructor-led courses are conducted.

Prerequisites

Add regions, location types, and facilities. Locations are in a facility and knowing the region of the facility and the type of location is important to accounting for wherelearning events happen.

Context

When learning administrators schedule courses to take place in a location, they look up those locations from the list that you provide. By building a list of the training locations, you not only help learning administrators schedule the right courses into the right locations, you also prevent scheduling conflicts, avoid room capacity issues, and track costs for the locations.

> **Note**
>
> Each individual time slot of a class (each unit in a course, for example), is assigned its own location. So, for example, if you have a course that has a classroom component and a lab component, you can schedule the classroom time slots into a classroom location and the lab time slots into a lab location.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Locations*.
2. Click *Add New*
3. Enter the summary information that SAP SuccessFactors requests to start the record.
4. Review the summary information in *Summary*, and if you need to make any changes, click *Apply Changes*.
5. If you're tracking costs, enter the cost information in *Base Cost*, and then click *Apply Changes*.
6. If you're tracking costs and you want to add additional costs (in addition to the base cost), enter the additional costs in *Additional Costs*, and then click *Apply Changes*.

Next Steps

Create equipment that is assigned to the location.

Copying Learning Locations [page 522]
Copy locations to close a location and move everything to the new location.

Learning Location Summary Fields [page 523]
: Learning locations summary fields describe important general information about the place where instructors and students meet to conduct training.

Learning Location Base Cost [page 524]
: Learning base costs set the baseline cost for conducting training in a location.

Learning Location Additional Costs [page 526]
: You set up the fields in locations' additional costs to record costs charged in addition to the base cost for the selected location.

Learning Locations [page 527]
: Learning locations are places inside a training facility where instructors and students meet to conduct training.

Rules for Scheduling a Class at a Training Location [page 527]
: When a learning administrator schedules a course to take place in a place that you track in the system, Learning follows these rules.

Task overview: Physical Learning Resources [page 489]

Previous task: Adding Learning Location Types [page 519]

Next task: Adding Learning Training Equipment [page 528]

Related Information

Why Regions Matter to Facilities and Your Physical Learning Environment [page 496]
Why Regions Matter to Instructors and your Physical Learning Environment [page 496]
Learning Facilities [page 510]
Activating Learning Currencies [page 834]
Adding Learning Cost Names [page 832]

18.1.9.1 Copying Learning Locations

Copy locations to close a location and move everything to the new location.

Context

Copy a location when you want to close one location and move its equipment, locations, and classes to a new location. For example, if you are moving offices from one location to another, you can click *Copy Facility* to leave the old location in the system for reporting purposes but move the equipment, future classes, and so on, to the new location.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Locations* .
2. Find the location you want to copy and open it.
3. Click *Copy Location* and decide what you want to move from the old location to the new one.

If you select...	Then SAP SuccessFactors Learning...
Move fixed equipment from old location to new	reassigns the equipment from the old location to the new location.
Update location relationships	reassigns the locations (rooms) of the old facility to the new facility.
Change class segments where old location is scheduled to new location	reassigns any class segments from the old location to the new location.

4. Click *Copy*.

Task overview: Adding Learning Training Locations [page 521]

Related Information

Learning Location Summary Fields [page 523]
Learning Location Base Cost [page 524]
Learning Location Additional Costs [page 526]
Learning Locations [page 527]
Rules for Scheduling a Class at a Training Location [page 527]
Learning Locations [page 527]

18.1.9.2 Learning Location Summary Fields

Learning locations summary fields describe important general information about the place where instructors and students meet to conduct training.

In *References* > *Physical Resources* > *Locations* > *Summary tab* , you can review and update the basic information about the location.

This Field...	...Is used as follows
Max. Capacity	The maximum threshold for registration in an class that is scheduled to take place at this location. You can assign multiple locations for a class. However, if learning administrators schedule a course into this location, and then enroll more people into the course than the class's capacity, the administrators are warned but not prevented from exceeding the capacity.
Contact Name	The name of the contact person for this specific location. The contact receives email messages regarding changes to the location and the objects scheduled to the location.
Contact Email	The contact's email address. Contacts have responsibility for the location. This email address is used for systems notification about the selected location.

Parent topic: Adding Learning Training Locations [page 521]

Related Information

Copying Learning Locations [page 522]
Learning Location Base Cost [page 524]
Learning Location Additional Costs [page 526]
Learning Locations [page 527]
Rules for Scheduling a Class at a Training Location [page 527]

18.1.9.3 Learning Location Base Cost

Learning base costs set the baseline cost for conducting training in a location.

In *References* > *Physical Resources* > *Locations* > *Base Cost*, you can indicate the minimum amount usually charged to conduct training in the selected location.

This Field...	...Is used as follows
Amount	The baseline cost to use this location. For example, if a location can cost $1000 to rent per day. You set $1000 as the amount and day as the unit of measure. When you schedule a class into this location for two days, for example, the class inherits a location cost of $2000. The total cost value for the base cost. To serve multiple markets, you can use the system to price the item, class, or other learning resources in multiple currencies. Click *Add More Currencies* to select additional currencies and enter the price, for example, of the item or class in each additional currency. The system prompts you to propagate the price of the item into the additional currencies.
Unit of Measure	The unit of measure to which the amount is to be charged. This usually in the form of time or person. For example per day, per hour, per year, and so on.
Cost Name	The name of the cost to add to the base cost.
Custom Cost Calculator	You can add base costs for the location by entering either an amount and unit of measure or by selecting an existing cost name. You can edit your base cost to apply it to current and future learning; past, current, and future learning; or selected learning.

Parent topic: Adding Learning Training Locations [page 521]

Related Information

Copying Learning Locations [page 522]
Learning Location Summary Fields [page 523]
Learning Location Additional Costs [page 526]
Learning Locations [page 527]
Rules for Scheduling a Class at a Training Location [page 527]
Adding Learning Cost Names [page 832]

18.1.9.4 Learning Location Additional Costs

You set up the fields in locations' additional costs to record costs charged in addition to the base cost for the selected location.

In *References* > *Physical Resources* > *Locations* > *Additional Costs*, you can record costs charged over and above the base cost for the selected location.

This Field...	...Is used as follows
Amount	The additional cost to use the location. For example, if the location includes a $500 cleaning cost that is not per-day but is a one-time cost at the end of training, you can add it in *Amount*. The base cost for the location might be $1000 per day, so over two days, the total cost of the location is $2500: $2000 per day plus $500 additional cost for cleaning. To serve multiple markets, you can use the system to price the item, scheduled offering, or other learning resources in multiple currencies. Simply click *Add More Currencies* to select additional currencies and enter the price, for example, of the item or scheduled offering in each additional currency. The system will prompt you to indicate if you want to propagate the price of the item into the additional currencies. Click *Yes* to propagate the price in the new currency.
Unit of Measure	The unit of measure to which the amount is to be charged. This usually in the form of time or person. For example per day, per hour, per year, and so on.
Cost Name	The name of the cost to add to the base cost.
Custom Cost Calculator	You can add base costs for the instructor by entering either an amount and unit of measure or by selecting an existing cost name. You can edit your base cost to apply it to current and future learning; past, current, and future learning; or selected learning.

Parent topic: Adding Learning Training Locations [page 521]

Related Information

Copying Learning Locations [page 522]
Learning Location Summary Fields [page 523]
Learning Location Base Cost [page 524]
Learning Locations [page 527]
Rules for Scheduling a Class at a Training Location [page 527]

Adding Learning Cost Names [page 832]

18.1.9.5 Learning Locations

Learning locations are places inside a training facility where instructors and students meet to conduct training.

A location is a part of a training facility. For example, a facility is a building where training takes place and locations are the rooms in the building where instructors meet with students. When learning administrators schedule training sessions to meet at a place, they are scheduling them into a location.

- Locations are usually a part of a facility, but not always. We recommend that you group locations into facilities for better tracking.
- Locations have a location type, which categorizes them according to your business needs.
- Locations typically have equipment in them. You can track the equipment by location when you associate equipment with the location.

You typically add locations during implementation and review them periodically.

Parent topic: Adding Learning Training Locations [page 521]

Related Information

Copying Learning Locations [page 522]
Learning Location Summary Fields [page 523]
Learning Location Base Cost [page 524]
Learning Location Additional Costs [page 526]
Rules for Scheduling a Class at a Training Location [page 527]
Rules for Scheduling a Class at a Training Location [page 527]
Learning Facilities [page 510]
Training Equipment [page 538]
Learning Location Types [page 520]
Finding the Courses Scheduled into a SAP SuccessFactors Learning Location [page 202]

18.1.9.6 Rules for Scheduling a Class at a Training Location

When a learning administrator schedules a course to take place in a place that you track in the system, Learning follows these rules.

- If you select no location for the class agenda, the system displays the facility of the selected class.
- If the location you select for the class agenda doesn't map to any facility, the system lists no facility.
- If the location you select for the class agenda maps to a facility that is different than that of the class facility, the system displays the facility of the selected location.

- If the facility and or location descriptions are blank, the system displays the facility or location ID.
- However, if the location of the class agenda maps to the class facility, then the system simply displays the facility of the selected class.

Parent topic: Adding Learning Training Locations [page 521]

Related Information

Copying Learning Locations [page 522]
Learning Location Summary Fields [page 523]
Learning Location Base Cost [page 524]
Learning Location Additional Costs [page 526]
Learning Locations [page 527]

18.1.10 Adding Learning Training Equipment

Add Learning training equipment to track its operational status and location for in instructor-led training.

Prerequisites

Add equipment statuses and equipment types. They are attributes of training equipment that you reference when you add equipment.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Equipment*.
2. Click *Add New*.
3. Enter the summary information that SAP SuccessFactors requests to start the record.

   > **Note**
   >
   > If you already created locations and facilities, you can place the equipment now by selecting the place in *Assigned Location* and *Facility*. If you have not yet added locations and facilities, you can place the equipment later.

4. Review the summary information in *Summary*, and if you need to make any changes, click *Apply Changes*.
5. If you are tracking costs, enter the cost information in *Base Cost* and *Additional Cost*, and then click *Apply Changes*.

6. If you are tracking costs and you want to add additional costs (in addition to the base cost), enter the additional costs in *Additional Costs*, and then click *Apply Changes*.

   Placing Training Equipment in Bulk [page 530]
   Place your training equipment in bulk when you have many pieces of equipment to place into facilities or locations.

   Placing a Single Piece of Training Equipment [page 531]
   Place a single piece of equipment when you just need to change one equipment record (as opposed to placing many pieces of equipment in bulk).

   Learning Equipment Placement [page 531]
   You can place Learning equipment with a facility, with a location in the facility, both, or neither depending on how you are organized.

   Learning Equipment Summary Fields [page 534]
   Read the Learning equipment summary to see the status and relationships of some equipment that you use in training.

   Learning Equipment Base Cost Fields [page 535]
   Learning equipment base cost fields describe the minimum cost of equipment, before you add additional costs.

   Learning Equipment Additional Costs Fields [page 536]
   Learning Equipment additional costs define the cost of using equipment that is more than the base cost.

   Copying Learning Equipment [page 537]
   Copy Learning equipment to efficiently create a new equipment record by using an existing one as a template.

   Training Equipment [page 538]
   Training equipment is any physical object that you use in training that is not consumed by the end of a course.

Task overview: Physical Learning Resources [page 489]

Previous task: Adding Learning Training Locations [page 521]

Next task: Adding Learning Materials [page 539]

Related Information

Learning Facilities [page 510]
Learning Locations [page 527]

18.1.10.1 Placing Training Equipment in Bulk

Place your training equipment in bulk when you have many pieces of equipment to place into facilities or locations.

Prerequisites

To place equipment, you must create the facilities and locations where the equipment will be located and you must create the equipment itself.

Procedure

1. Go to SAP SuccessFactors Learning Administration.
2. To place **dedicated** equipment in locations, go to *References* > *Physical Resources* > *Locations*.
   a. Find the location where the equipment should be placed and open the location.
   b. Go to *Equipment*.
   c. Click *add one or more from list* and search for the equipment that should be placed in the location.
   d. When you find the equipment, select its *Add* checkbox and then click the *Add* button.
   e. Repeat this process for all locations.
3. To place **floating** equipment in facilities, go to *References* > *Physical Resources* > *Facilities*.
   a. Find the facility where the equipment should be placed and open the facility.
   b. Go to *Equipment*.
   c. Click *add one or more from list* and search for the equipment that should be placed in the facility.
   d. When you find the equipment, select its *Add* checkbox and then click the *Add* button.
   e. Repeat this process for all facilities.

Task overview: Adding Learning Training Equipment [page 528]

Related Information

Placing a Single Piece of Training Equipment [page 531]
Learning Equipment Placement [page 531]
Learning Equipment Summary Fields [page 534]
Learning Equipment Base Cost Fields [page 535]
Learning Equipment Additional Costs Fields [page 536]
Copying Learning Equipment [page 537]
Training Equipment [page 538]
Learning Facilities [page 510]
Learning Locations [page 527]

18.1.10.2 Placing a Single Piece of Training Equipment

Place a single piece of equipment when you just need to change one equipment record (as opposed to placing many pieces of equipment in bulk).

Context

To place equipment, you must create the facilities and locations where the equipment will be located and you must create the equipment itself.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Physical Resources* > *Equipment*.
2. Find the equipment that you want to place and open it.
3. In *Summary*, select the facility or the location.

Task overview: Adding Learning Training Equipment [page 528]

Related Information

Placing Training Equipment in Bulk [page 530]
Learning Equipment Placement [page 531]
Learning Equipment Summary Fields [page 534]
Learning Equipment Base Cost Fields [page 535]
Learning Equipment Additional Costs Fields [page 536]
Copying Learning Equipment [page 537]
Training Equipment [page 538]

18.1.10.3 Learning Equipment Placement

You can place Learning equipment with a facility, with a location in the facility, both, or neither depending on how you are organized.

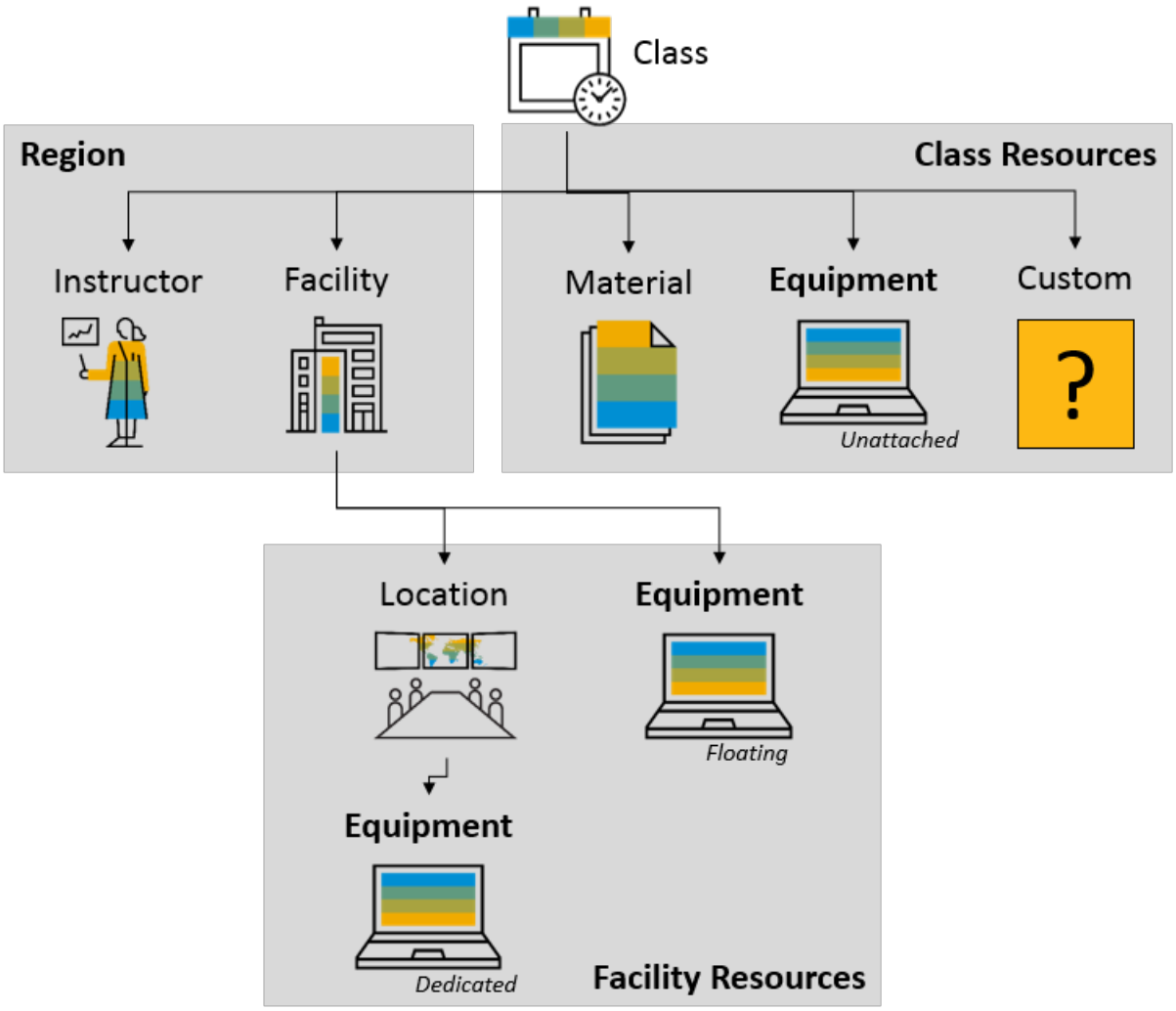
Equipment can belong to three different categories of association:

- **Dedicated**: The equipment is associated to an individual location inside of a facility. For example, a projector bolted to the ceiling of a training room. You associate the projector to an individual location (the room) so that

you can see the status of the projector at that location. If the projector is broken and you need to project as part of training, then you should either contact the facility manager to fix the projector or you should find an alternate location.

- **Floating**: The equipment is associated with the facility but not an individual room. For example, if a projector is mobile, you can put it on a cart, wheel it to a room, and substitute it for the room's broken projector. In this case, you want to see the projectors that are floating in the facility and contact the facility manager to substitute or schedule the facility projector in place of the dedicated projector.
- **Unattached**: The equipment is neither dedicated to a location nor floating in a facility. Unattached equipment is often specialty equipment that you ship to a facility for uncommon classes. For example, imagine that every year, you teach electricians in different parts of the country to install new versions of current transformers (CTs). You don't want to attach them to a location or a facility because you update them every year for one-time training. And you might want to stagger the training in different parts of the country so that each week, you use the same CTs in a different facility. You might ship the CTs to the training facility each time you hold the training and then ask the manager to ship them back.

It is unusual to place one piece of equipment in both a facility and a location because you usually want to make a distinction between equipment in a location (always in a room) and equipment that can be moved around a facility (floating equipment). For example, when you run the facility data report, you see the equipment that is free-floating in the facility. If you add the equipment to both the location and the facility, it appears in the facility data report (as floating) in the facility data report and as dedicated when you run the location data report.



Equipment in a Facility

Parent topic: Adding Learning Training Equipment [page 528]

Related Information

Placing Training Equipment in Bulk [page 530]
Placing a Single Piece of Training Equipment [page 531]
Learning Equipment Summary Fields [page 534]
Learning Equipment Base Cost Fields [page 535]
Learning Equipment Additional Costs Fields [page 536]
Copying Learning Equipment [page 537]
Training Equipment [page 538]

18.1.10.4 Learning Equipment Summary Fields

Read the Learning equipment summary to see the status and relationships of some equipment that you use in training.

In *References* > *Physical Resources* > *Equipment* > *Equipment Summary tab*, you can find general information about the equipment. This tab also tracks the association between the equipment and locations or facilities and the status of the equipment.

This Field...	...Is used as follows
Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Serial Number	The serial number of the selected equipment. Serial numbers are not checked for uniqueness by the system.
Equipment Status	The status of the equipment based on a pre-defined measure: for example: 1= In service, 2= Broken, 3= Under Maintenance.
Can Be Scheduled	This check box, when selected, indicates that the equipment is available to be scheduled for scheduled offerings. Changes this setting can only be made here. It cannot be changed in the Scheduled Offerings section.
Assigned Location	Use to view and update equipment assigned to a facility in order to schedule offerings at the location. The location can be a specific classroom, conference room, or other specific place where this piece of equipment is permanently assigned. See Locations.
Facility	The grouping of locations to which this equipment has been assigned, such as a building with many classrooms. See Facilities.
Contact	Contact information about the person or office responsible for this equipment.

Parent topic: Adding Learning Training Equipment [page 528]

Related Information

Placing Training Equipment in Bulk [page 530]
Placing a Single Piece of Training Equipment [page 531]

Learning Equipment Placement [page 531]
Learning Equipment Base Cost Fields [page 535]
Learning Equipment Additional Costs Fields [page 536]
Copying Learning Equipment [page 537]
Training Equipment [page 538]

18.1.10.5 Learning Equipment Base Cost Fields

Learning equipment base cost fields describe the minimum cost of equipment, before you add additional costs.

In *References* > *Physical Resources* > *Equipment* > *Base Cost tab*, you can indicate the minimum amount usually charged to conduct training with the selected equipment.

This Field...	...Is used as follows
Amount	This is the baseline cost for using the equipment. For example, if you rent the equipment for $100 per day, then the amount is $100 and the unit of measure is day. To serve multiple markets, you can use the system to price the item, scheduled offering, or other learning resources in multiple currencies. Simply click *Add More Currencies* to select additional currencies and enter the price, for example, of the item or scheduled offering in each additional currency. The system will prompt you to indicate if you want to propagate the price of the item into the additional currencies. Click *Yes* to propagate the price in the new currency.
Unit of Measure	The unit of measure to which the amount is to be charged. This usually in the form of time or person. For example per day, per hour, per year, and so on.
Cost Name	The name of the cost to add to the base cost.
Custom Cost Calculator	You can add base costs for the equipment by entering either an amount and unit of measure or by selecting an existing cost name. You can edit your base cost to apply it to current and future learning; past, current, and future learning; or selected learning.

Parent topic: Adding Learning Training Equipment [page 528]

Related Information

Placing Training Equipment in Bulk [page 530]

Placing a Single Piece of Training Equipment [page 531]
Learning Equipment Placement [page 531]
Learning Equipment Summary Fields [page 534]
Learning Equipment Additional Costs Fields [page 536]
Copying Learning Equipment [page 537]
Training Equipment [page 538]

18.1.10.6 Learning Equipment Additional Costs Fields

Learning Equipment additional costs define the cost of using equipment that is more than the base cost.

In *References* > *Physical Resources* > *Equipment* > *Additional Costs*, you can record costs charged over and above the base cost for the selected equipment.

Field	Description
Amount	This is the additional cost to use the equipment. For example, if the equipment includes a $50 insurance policy per day, you can add it in *Amount*. If the base cost is $100 per day, then SAP SuccessFactors Learning adds the additional cost to the base cost so that the equipment is $150 per day. To serve multiple markets, you can use the system to price the item, scheduled offering, or other learning resources in multiple currencies. Simply click *Add More Currencies* to select additional currencies and enter the price, for example, of the item or scheduled offering in each additional currency. The system will prompt you to indicate if you want to propagate the price of the item into the additional currencies. Click *Yes* to propagate the price in the new currency.
Unit of Measure	The unit of measure to which the amount is to be charged. This usually in the form of time or person. For example per day, per hour, per year, and so on.
Cost Name	The name of the cost to add to the base cost.
Custom Cost Calculator	You can add base costs for the equipment by entering either an amount and unit of measure or by selecting an existing cost name. You can edit your base cost to apply it to current and future learning; past, current, and future learning; or selected learning.

Parent topic: Adding Learning Training Equipment [page 528]

Related Information

Placing Training Equipment in Bulk [page 530]
Placing a Single Piece of Training Equipment [page 531]
Learning Equipment Placement [page 531]
Learning Equipment Summary Fields [page 534]
Learning Equipment Base Cost Fields [page 535]
Copying Learning Equipment [page 537]
Training Equipment [page 538]

18.1.10.7 Copying Learning Equipment

Copy Learning equipment to efficiently create a new equipment record by using an existing one as a template.

Context

Clicking *Copy Equipment* is the most efficient way to create a new resource record when you want to reuse information from an existing resource record. When you copy an existing resource record, SAP SuccessFactors copies the summary data (the facility, the contact, and so on), the base cost, and the additional cost to the new equipment record. You can also choose to add the new piece of equipment to the courses where the old piece of equipment was already scheduled.

You often have multiple equipment of the same kind at the same location. For example, one classroom might have ten computers that are all the same. You want to create a record for the first of the ten computers and then copy the values as a template to create the remaining nine computers. You can copy the first record to efficiently create the new records of the equipment.

You can also copy existing equipment records into new records if you decommission a piece of equipment or if a piece of equipment breaks. For example, if you use Cardiopulmonary Resuscitation (CPR) dummies as part of a CPR class and you need to replace a dummy with the same model in the same facility, you can copy the record for the first dummy into a new record for the new dummy.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Equipment*.
2. Find and open the equipment that you want to use as a template for the new equipment record.
3. Click *Copy Equipment*.
4. Type a new equipment ID for the new record that you're creating from the template.

   For example, if you're creating one computer for a classroom and copying it nine times, the original ID might be COMPUTER_01 and you can create a new ID of COMPUTER_02. Then you can copy again and create COMPUTER_03, and so on.

5. If you want the new equipment to be used in all existing courses where the first equipment was scheduled, click *Copy scheduled offering relationships*.

   You often copy the scheduled offering relationships when you're replacing a decommissioned piece of equipment. You want the new equipment to take the place of the old equipment in those classes.
6. Click *Copy*.

   SAP SuccessFactors copies the summary information, the base cost, and the additional cost to the new equipment ID and opens the new equipment record for you.
7. In *Summary*, double-check the summary information and change anything that needs to be different in the new record.

   You often want to change *Serial Number*, *Description*, and *Equipment Status*. The serial number is unique to each piece of equipment and the status often changes if you're replacing defective equipment: the status of the old equipment might be "Decommissioned" and you want the new equipment to be "In Service". Equipment status is configurable, so it differs by company.

Task overview: Adding Learning Training Equipment [page 528]

Related Information

Placing Training Equipment in Bulk [page 530]
Placing a Single Piece of Training Equipment [page 531]
Learning Equipment Placement [page 531]
Learning Equipment Summary Fields [page 534]
Learning Equipment Base Cost Fields [page 535]
Learning Equipment Additional Costs Fields [page 536]
Training Equipment [page 538]

18.1.10.8 Training Equipment

Training equipment is any physical object that you use in training that is not consumed by the end of a course.

Training equipment lasts for more than one course. For example, a computer, a projector, a circuit board, or anything that is physical and that is re-used and depreciated is "training equipment". If you want to track materials that **are** consumed by the end of the course, track them as training equipment.

To see your list of training equipment, go to SAP SuccessFactors Learning Administration, and then and go to *References* > *Physical Resources* > *Equipment*.

Track SAP SuccessFactors Learning physical resources to avoid double-booking resources and to track costs. If you create one class in SAP SuccessFactors Learning administration and it uses a room, then that room is removed no longer available for other classes at the same time. Additionally, resources have a cost. Your organization might have to pay to booking a room in a training facility or rent equipment. You can track those costs in SAP SuccessFactors Learning resources.

Parent topic: Adding Learning Training Equipment [page 528]

Related Information

Placing Training Equipment in Bulk [page 530]
Placing a Single Piece of Training Equipment [page 531]
Learning Equipment Placement [page 531]
Learning Equipment Summary Fields [page 534]
Learning Equipment Base Cost Fields [page 535]
Learning Equipment Additional Costs Fields [page 536]
Copying Learning Equipment [page 537]
Learning Equipment Status [page 517]
Learning Equipment Types [page 519]
Learning Equipment Placement [page 531]
Adding Learning Equipment Types [page 518]

18.1.11 Adding Learning Materials

Add Learning materials so that you can track the materials that you need for courses.

Context

Track materials that need to be replenished periodically. For example, if you conduct courses in labs and you use chemicals during the training, you need to replenish them from time to time and you need to track the cost of the materials. Materials can be common or uncommon and big or small. Examples of materials are pens, books, and prizes. Learning administrators can associate materials to classes to account for their cost.

> **Note**
>
> Learning materials are useful if you use Learning Commerce because you can assign a cost to the material to track what the consumables cost for your training environment. Customers who aren't tracking costs with Commerce don't often use Learning Materials.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Materials*.
2. Click *Add New*.
3. Enter the summary information that Learning requests to start the record.

4. Review the summary information in *Summary*, and if you need to make any changes, click *Apply Changes*.
5. If you're tracking costs, enter the cost information in *Base Cost* and *Additional Cost*, and then click *Apply Changes*.
6. If you're tracking pricing, add it in *Pricing*.

Copying Learning Material [page 540]
: Copy Learning materials when you want to replace an existing material with a new one in all items and classes or when you have many materials that are the same cost and price.

Learning Material Summary Fields [page 541]
: Learning materials summary fields contain basic information about the selected material.

Learning Material Base Cost [page 542]
: Use Learning material base cost fields to set the baseline cost for using a material in training.

Learning Material Additional Costs [page 543]
: Use these fields to set costs charged in addition to the baseline cost of the material.

Learning Material Pricing [page 544]
: Use Learning material pricing fields to set a price for users to buy a material.

Learning Materials [page 545]
: Materials are supplies you use in training that are consumable: hand outs, manuals, lab chemicals, and so on.

Task overview: Physical Learning Resources [page 489]

Previous task: Adding Learning Training Equipment [page 528]

Next: Custom Training Resources [page 546]

18.1.11.1 Copying Learning Material

Copy Learning materials when you want to replace an existing material with a new one in all items and classes or when you have many materials that are the same cost and price.

Context

You copy materials to replace one material with another or to use a template to create many similar materials. For example, if you change suppliers for a training material and you want to replace the old supplier's material with the new supplier's material, you can click *Copy Material*, use the old supplier's information as a starting place **and also** replace the old supplies with the new ones in all items and classes. Efficiency is another case for copying materials: if you have five materials that all have the same costs and price, you can create one material as a template and copy the summary, pricing, base cost, and additional costs to the new material.

Procedure

1. Go to Learning Administration, and then go to *References* > *Physical Resources* > *Materials*.
2. Find the material that you want to copy and open it.
3. Click *Copy Material* and decide what you want to move from the old facility to the new one.

If you select...	Then SAP SuccessFactors...
Copy Item	copies the items that are associated with the existing resource record to the new resource record.
Copy Class	copies the classes that are associated with the existing resource record to the new resource record.
Copy Facility	copies the facilities that are associated with the existing resource record to the new resource record.

4. Click *Copy*.

Task overview: Adding Learning Materials [page 539]

Related Information

Learning Material Summary Fields [page 541]
Learning Material Base Cost [page 542]
Learning Material Additional Costs [page 543]
Learning Material Pricing [page 544]
Learning Materials [page 545]

18.1.11.2 Learning Material Summary Fields

Learning materials summary fields contain basic information about the selected material.

In *References* > *Physical Resources* > *Materials* > *Summary*, you can view, add, or edit the general information about this material.

Field	Description
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Revision Number	The identification of the revision of the material type you're viewing/editing. This number is mainly for version control of the selected material. For example, if you use an instruction manual from a third party and the third party revises it, you might want to track the revision number. Many companies don't need revisions because revisions are too detailed a tracking level. However, if you're audited by an oversight organization, you should consider using revisions so that you can see which version of the training materials (and which version of the regulations) your classes use.
SKU	The Stock Keeping Unit is a unique ID associated with the material used for your record keeping.
Available in Library	Describes whether the material appears in a library. Available in Library is always set to No.
Copy Material	The *Copy Material* button copies the material into a new material ID.

Parent topic: Adding Learning Materials [page 539]

Related Information

Copying Learning Material [page 540]
Learning Material Base Cost [page 542]
Learning Material Additional Costs [page 543]
Learning Material Pricing [page 544]
Learning Materials [page 545]

18.1.11.3 Learning Material Base Cost

Use Learning material base cost fields to set the baseline cost for using a material in training.

Manage a material's base cost in *References* > *Physical Resources* > *Materials* > *Base Cost*.

Field	Description
Amount	This is the baseline cost of the material. This cost is added to classes when the class requires the material. To serve multiple markets, you can use the system to price the item, class, or other learning resources in multiple currencies. Simply click *Add More Currencies* to select additional currencies and enter the price, for example, of the item or class in each additional currency. The system will prompt you to indicate if you want to propagate the price of the item into the additional currencies. Click *Yes* to propagate the price in the new currency.
Unit of Measure	The unit of measure to which the amount is to be charged. This usually in the form of time or person. For example per day, per hour, per year, and so on.
Cost Name	The name of the cost to add to the base cost.
Custom Cost Calculator	You can add base costs for the material by entering either an amount and unit of measure or by selecting an existing cost name. You can edit your base cost to apply it to current and future learning; past, current, and future learning; or selected learning.

Parent topic: Adding Learning Materials [page 539]

Related Information

Copying Learning Material [page 540]
Learning Material Summary Fields [page 541]
Learning Material Additional Costs [page 543]
Learning Material Pricing [page 544]
Learning Materials [page 545]

18.1.11.4 Learning Material Additional Costs

Use these fields to set costs charged in addition to the baseline cost of the material.

Manage additional costs in *References* > *Physical Resources* > *Materials* > *Additional Costs tab*.

Field	Description
Amount	This is the cost that is added to the base cost when you add the material to a class. For example, a material might cost $100 (base cost) but might have the additional cost of shipping. How you define base cost and additional cost depends on your business practices. To serve multiple markets, you can use the system to price the item, class, or other learning resources in multiple currencies. Simply click *Add More Currencies* to select additional currencies and enter the price, for example, of the item or class in each additional currency. The system will prompt you to indicate if you want to propagate the price of the item into the additional currencies. Click *Yes* to propagate the price in the new currency.
Unit of Measure	The unit of measure to which the amount is to be charged. This usually in the form of time or person. For example per day, per hour, per year, and so on.
Cost Name	The name of the cost to add to the base cost.
Custom Cost Calculator	You can add additional costs for the material by entering either an amount and unit of measure or by selecting an existing cost name. You can edit your base cost to apply it to current and future learning; past, current, and future learning; or selected learning.

Parent topic: Adding Learning Materials [page 539]

Related Information

Copying Learning Material [page 540]
Learning Material Summary Fields [page 541]
Learning Material Base Cost [page 542]
Learning Material Pricing [page 544]
Learning Materials [page 545]

18.1.11.5 Learning Material Pricing

Use Learning material pricing fields to set a price for users to buy a material.

Set the price of materials in *References* > *Physical Resources* > *Materials* > *Pricing*, you can price the selected material. You can do so in multiple currencies.

Field	Description
Add More Currencies	This button allows you to price the selected material in more than one currency. When pricing the material in more than one currency, the system shows you all available currencies for you to enter the amount in the corresponding Currency ID. The amount you enter with the corresponding Currency ID make up the price.
Default	This is the price of the material. The price is a in a currency.
Type	There are two types of pricing methods in the system, Numeric and Custom Calculator. The numeric method simply Currency ID-Amount pair like $5.00 (USD). The custom calculator method is used to add a number of custom costs to determine a price. For example, Transportation= Taxi + Airfare. You have to pre-define each of these costs.
Price	This number is read is association of the corresponding Currency ID in the preceding column.
Currency ID	This ID is based on the ISO 4217 currency names and code. The currencies listed in the system are those currently supported. For a complete list of the currency names and code elements, go to the ISO official web site.
Add	When adding another currency to the list of prices for the selected material, make sure to click this check box before clicking the Add button. Otherwise, the price will not be listed for the selected material.

Parent topic: Adding Learning Materials [page 539]

Related Information

Copying Learning Material [page 540]
Learning Material Summary Fields [page 541]
Learning Material Base Cost [page 542]
Learning Material Additional Costs [page 543]
Learning Materials [page 545]

18.1.11.6 Learning Materials

Materials are supplies you use in training that are consumable: hand outs, manuals, lab chemicals, and so on.

Track materials that need to be replenished periodically. For example, if you conduct courses in labs and you use chemicals during the training, you need to replenish them from time to time and you need to track the cost of the materials. Materials can be common or uncommon and big or small. Examples of materials are pens, books, and prizes. Learning administrators can associate materials to classes to account for their cost.

You typically set up materials during implementation and revisit them periodically. To see your materials, go toLearning Administration and then go to *References* > *Physical Resources* > *Materials*.

Parent topic: Adding Learning Materials [page 539]

Related Information

Copying Learning Material [page 540]
Learning Material Summary Fields [page 541]
Learning Material Base Cost [page 542]
Learning Material Additional Costs [page 543]
Learning Material Pricing [page 544]

18.1.12 Custom Training Resources

A custom training resource is something that you use in training and doesn't fit one of the standard categories of training resources.

A custom training resource is anything that you use in training, that you want to track, but that doesn't fit into one of the default resource categories. Default resource categories are, for example, training materials, equipment, and facilities. If you want to track, for example, subscription access to a cloud service, that access doesn't fit neatly into one of the standard types of resources. You might add it as a custom resource.

Track SAP SuccessFactors Learning physical resources to avoid double-booking resources and to track costs. If you create one class in SAP SuccessFactors Learning administration and it uses a room, then that room is removed no longer available for other classes at the same time. Additionally, resources have a cost. Your organization might have to pay to booking a room in a training facility or rent equipment. You can track those costs in SAP SuccessFactors Learning resources.

To see your custom resources, log in to SAP SuccessFactors Learning Administration and go to *References* > *Physical Resources* > *Custom Resources*.

Parent topic: Physical Learning Resources [page 489]

Previous task: Adding Learning Materials [page 539]

18.2 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.

18.2.1 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*.

18.2.2 Adding Instructors

Add instructors so that you can track how they're scheduled to teach classes.

Procedure

1. Go to Learning Administration, go to *People* > *Instructors*, and then click *Add New*.
2. Add the instructors identity information.

Option	Description
Instructor ID, *Last Name*, *First Name*, **and middle initial (***Middle Name***)**	Add the name of the instructor and the ID to identify the instructor. Match the names and the ID to the related user record.
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.
Company	If you use instructors from a different company, then you can enter it so that you can find, report, and track that information.
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.
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.
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.

Option	Description
	Note You can enter over 4000 bytes in the biography field, but when you save, it truncates 4000 bytes.

3. Add the security and access controls for the instructor.

Option	Description
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
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.
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.

4. If you want to authorize this instructor to teach a course, add it in *Authorized to Teach*.
5. If you're using Virtual Learning Service (VLS) so that instructors can teach remote courses in a virtual meeting room, add the account information in *VLS Settings*.

Next Steps

Complete the instructor by using the tab sections to add additional information.

Related Information

Instructors and Administrators must have Related User IDs and the IDs Must Match [page 572]
Instructor Authorization to Teach [page 574]
Assigning the Instructor Role [page 551]
Authorizing One Instructor to Teach Many Learning Items [page 556]
Adding Instructors to Regions [page 552]
Adding Custom Field Values to Instructors [page 555]
Adding Instructor Shipping Information [page 556]
Importing Instructors [page 547]

Enabling Instructors to Post Learning for Impromptu Training [page 550]
Assigning a Related User to Instructors [page 552]
Configuring Instructors for VLS [page 553]

18.2.3 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.

18.2.4 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.

18.2.5 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*.

18.2.6 Adding Instructors to Regions

When you add instructors to regions, you can better plan their training calendar because you know where they're located and can assign them to classes in their region.

Prerequisites

Before you can add instructors to regions, add the regions in *People* > *Instructors* > *Regions*. You typically add regions when you implement and then review them periodically.

Procedure

1. Go to Learning Administration, and then go to *People* > *Instructors*.
2. Search for the instructor who you want to add to a region.
3. Go to *Regions* and then click *add one or more from list* to search for and add the instructor to regions.

   > **Note**
   >
   > Instructors can teach in more than one region. For example, you can have three regions in Europe and assign an instructor to all three regions. In this case, the instructor is therefore responsible for traveling within Europe to teach.

4. Select the instructor's primary region by clicking *Primary*.

   A primary region is where the instructor is located most of the time: the instructor's home region. When you're scheduling, it's typically less expensive to match an instructor with a course in the primary region because the instructor doesn't need to travel.

For example, an instructor's primary location can be in the Northeast U.S, but have secondary regions in other parts of North America. The primary region indicates that the instructor **can** be matched with classes in, for example, California, but that the closer region is in the Northeast U.S.

5. Click *Apply Changes*.

18.2.7 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 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.

Related Information

Enabling Instructors to Change their VLS Passwords [page 554]
Adding a Virtual Time Slot [page 196]
Configuring VLS Time Slots to Add Learning History Records [page 197]

18.2.8 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.

18.2.9 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*.

18.2.10 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.

18.2.11 Authorizing One Instructor to Teach Many Learning Items

Authorize one instructor to teach many courses (learning items) when you want to declare that one instructor as qualified to teach multiple courses.

Prerequisites

To demonstrate that an instructor is certified or qualified to teach one or more items, you can create a user record for the instructor and manage those learning requirements and needs just like any other user. By managing the instructor's learning like any other user, you can ensure that the instructors meet their requirements before assigning them to lead a segment of a class.

Context

If you're tracking instructors in SAP SuccessFactors Learning, then you can authorize them to teach a learning item. When you authorize an instructor to teach a learning item, you're declaring that the instructor is qualified to teach it. You can use the authorized to teach flag to assure that primary instructors of this course are qualified. You can also use it to restrict exam proctoring to only authorized instructors.

> → Tip
>
> If you have one learning item and you want to authorize many instructors to teach it, you can do that in the learning item record. Go to *People* > *Instructors*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Instructors*.
2. Find and open the instructor who you want to authorize.
3. Go to *Authorized to Teach*.
4. For each learning item that this instructor is authorized to teach, click *add one or more from list* and then add the learning item.

   You see the learning item in the *Update the Authorized Items for the Instructor* list. You can also go to the learning item record and see this instructor listed as one of the authorized instructors.

Next Steps

If you need to remove a learning item from the instructor's authorizations, go to the *Update the Authorized Items for the Instructor* list, select the learning item's *Remove* box, and then click *Apply Changes*.

18.2.12 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 576]
Legacy Proctored Exams [page 753]
Creating Legacy Proctored Exams [page 754]

18.2.13 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 557]
Types of Proctor Codes [page 576]
Creating Legacy Proctored Exams [page 754]
Purging Instructor Proctor Codes [page 560]
Deleting Instructor Proctor Codes [page 560]

18.2.14 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.

18.2.15 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*.

18.2.16 Viewing Instructor Teaching Schedules

View instructor teaching schedules to see courses and times that an instructor is a **primary instructor** and is scheduled to teach.

Context

A primary instructor is responsible for teaching the segment. Some customers use secondary instructors who assist or shadow the primary instructor.

> → Tip
>
> You can also search classes by instructor to find all courses that this instructor is scheduled to teach.

Procedure

1. Go to Learning Administration, and then go to *People* > *Instructors*.
2. Search for the instructor whose schedule you want to view.
3. Go to *Scheduling* and use the information to see how the instructor is scheduled.

Field	Description
Start Date/Time	The start date and time of the entire class. The instructor might be teaching only one segment of the class, so this isn't the start of the instructor's work. For example, if a class is scheduled Monday through Friday, and the instructor teaches only on Wednesday, the Start Date/Time still shows as Monday.
End Date/Time	The end date and time of the entire class. The instructor might be teaching only one segment of the class, so this isn't the end of the instructor's work. For example, if a class lasts a week (Monday through Friday), and the instructor teaches only on Wednesday, the End Date/Time would still show Friday.
Schedule Block/Item Description	The description of either the schedule block or the course that the class teaches. Schedule blocks are a way to "reserve" an instructor. For example, if an instructor is on vacation, you can create a schedule block so that the instructor can't be scheduled at that time.

Next Steps

If you want to change the instructor schedule, go to the class segments: *Learning Activities* > *Classes* > *Agenda*.

18.2.17 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.

   Instructor Base Costs [page 563]
   Instructor base costs are a baseline amount that an instructor costs to conduct training.

   Instructor Item Costs [page 566]
   Instructor item costs are substituted for base costs. They represent the cost of an instructor per learning item.

   Instructor Additional Costs [page 568]
   Instructor additional costs are added to base or item costs.

   Instructor Cost Structure [page 569]
   If you create records for your instructors in SAP SuccessFactors Learning, you can track their costs by building a cost structure.

   How Instructor Cost is Decided at Assignment Time [page 570]
   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.

18.2.17.1 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.
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.

Parent topic: Assigning Costs to an Instructor [page 562]

Related Information

Instructor Item Costs [page 566]
Instructor Additional Costs [page 568]
Instructor Cost Structure [page 569]
How Instructor Cost is Decided at Assignment Time [page 570]
Instructor Item Costs [page 566]
Instructor Additional Costs [page 568]

18.2.17.2 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.

This field...	...Is used as follows
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.
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.

Parent topic: Assigning Costs to an Instructor [page 562]

Related Information

Instructor Base Costs [page 563]
Instructor Additional Costs [page 568]

Instructor Cost Structure [page 569]
How Instructor Cost is Decided at Assignment Time [page 570]
How Instructor Cost is Decided at Assignment Time [page 570]

18.2.17.3 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.
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.

Parent topic: Assigning Costs to an Instructor [page 562]

Related Information

Instructor Base Costs [page 563]
Instructor Item Costs [page 566]
Instructor Cost Structure [page 569]
How Instructor Cost is Decided at Assignment Time [page 570]

18.2.17.4 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.

Parent topic: Assigning Costs to an Instructor [page 562]

Related Information

Instructor Base Costs [page 563]
Instructor Item Costs [page 566]
Instructor Additional Costs [page 568]
How Instructor Cost is Decided at Assignment Time [page 570]

18.2.17.5 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**.

Parent topic: Assigning Costs to an Instructor [page 562]

Related Information

Instructor Base Costs [page 563]
Instructor Item Costs [page 566]
Instructor Additional Costs [page 568]
Instructor Cost Structure [page 569]
Instructor Base Costs [page 563]
Instructor Item Costs [page 566]

18.2.18 Instructors and Administrators must have Related User IDs and the IDs Must Match

In legacy configurations, we allowed customers to create instructors and administrators without related user IDs, and this configuration still works, but it isn't supported for purge processes and therefore not recommended. Additionally, one person's end-user ID, instructor ID, and administrator ID must match.

> **Note**
>
> If you have adopted platform, then it would be very rare for you to have instructors and administrators **without** related user IDs. Native-only customers who haven't adopted platform are at higher risk of having this configuration.

In legacy, native-only configurations, you could create instructors and administrators with different ID values, but in an integrated environment, one person's learner ID (end-user ID), instructor ID, and administrator ID must match. For example, all must be `jsmith`. In legacy, native-only configurations, it was also common to create instructors and administrators **without** related user IDs:

- You could go to *People* > *Instructors* and add a new instructor with an empty *Related User*.
- You could go to *System Administration* > *Security* > *Administrators* and add a new administrator with an empty *Related User*.

We no longer recommend empty related users because purge requires learner user IDs (*People* > *Users*). It cascades from the learner user ID to instructor and administrator data. You can't operate SAP SuccessFactors Learning if learner (end-user), instructor, and administrator ID values don't match.

18.2.19 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.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
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.

Field	Description
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.
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.
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.
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.
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.

Related Information

Instructor Authorization to Teach [page 574]
Instructor Virtual Classrooms [page 577]

18.2.20 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.

18.2.21 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 576]
Generating Proctor Codes For Instructors [page 557]
Sending Proctor Codes to Instructors [page 559]
Purging Instructor Proctor Codes [page 560]
Deleting Instructor Proctor Codes [page 560]
Configuring Proctored Exams
Legacy Proctored Exams [page 753]
Settings for Proctored Legacy Exams [page 753]
Creating Legacy Proctored Exams [page 754]

18.2.22 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 557]
Sending Proctor Codes to Instructors [page 559]

18.2.23 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*).

18.2.24 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.

18.3 Revising Learning Metadata

Revise Learning metadata to make your learning objects easier to find and manage.

You usually add metadata during implementation and then revise it periodically. For example, you might decide on new ways to categorize curricula to make them easier for administrators to find or you might add new topics (subject ares) so that courses are easier for learners to find.

18.3.1 Metadata that Helps Administrators Find Information

18.3.1.1 Adding Course (Learning Item) Sources

Add course (learning item) sources to define the source of training - the developer of the course, for example.

Context

In SAP SuccessFactors Learning, *Sources* identify the entity where the training originated. Different companies use source differently, but examples include the developer of a course, the organization or regulatory body that requires the item, or the Open Content Network (OCN) partner. For example, if you import courses from Skillsoft, you can add it as a source. Learners can filter their course search results by your sources. For example, they can filter their results by all Skillsoft courses or all LinkedIn Learning courses.

Procedure

1. Go to Learning Administration, and then go to *References* > *Learning Activities* > *Sources*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps administrators understand the source.

   The content of this box appears in the user interface and in reports.
4. Click *Add*.

18.3.1.2 Adding Instructional Delivery Methods

Add instructional delivery methods to categorize learning items (courses) by how you deliver them and how users consume them.

Context

Learning administrators often want to search for courses by **how** they are delivered. For example, you might have courses that are written materials (like a book), audio-visual (a video), a simulation, or an instructor-led course. When you define the delivery methods (book, video, simulation, and instructor), your administrators can easily find courses by how they are delivered.

> → Tip
>
> Instructional delivery methods are similar to course classifications (like online, instructor led, and instructor led with online content), but you use them for two different purposes. We created delivery methods so that you could have an open set of values that make sense for your business, help administrators search, and do **not** affect the behavior of the course. Classification is a closed set that, if changed, affects the behavior of the course.

Procedure

1. Go to Learning Administration, and then go to *References* > *Learning Activities* > *Delivery Methods*.
2. Click *Add New*.
3. Add a *Delivery Method ID* and then a *Description* that helps administrators understand the delivery method.
4. Click *Add*.

18.3.1.3 Adding Curriculum Types

Add curriculum types so that you can add categories to curricula and make them easier to find.

Context

If you are using curricula to assign courses to users, then you want to give your learning administrators a way to categorize the curricula. For example, you might create curricula that are for health and safety, for financial compliance, and for human resources.

> ⓘ Note
>
> Each curriculum can be associated with only one curriculum type.

Procedure

1. Go to Learning Administration, and then go to *References* > *Learner Activities* > *Curriculum Types*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps administrators understand the category.

   For example, administrators might know that they are searching for laboratory curriculum that has to do with health and safety. They can search “laboratory” and select the curriculum type “health and safety” to narrow their searches.
4. Click *Add*.

18.3.1.4 Adding Graduation Group Status

Add a graduation group status to track learners' progress against peers who are taught together and graduate together.

Context

A graduation group is a group of users who attend a set of scheduled offerings together and who graduate together. For example, if you open a new manufacturing line, you might want to train all workers on that line in a group: they attend their courses together, they can be tracked as a group, and they graduate together. Their **status** is an indicator of how each individual is performing in the group. For example, if one user in the class was reassigned and could not complete the courses together with the rest of the group, the user's status could be “incomplete”.

Procedure

1. Go to Learning Administration, and then go to *References* > *Learning* > *Class Status* > *References* > *Learning Activities* > *Class Status*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps others understand the status.
4. Click *Add*.

Next Steps

Unlike other status values in SAP SuccessFactors Learning, a graduation group status does **not** update automatically. You update it in *Learning* > *Classes* > *Users* > *People* > *Users* and it appears in the Class Progress report.

18.3.1.5 Adding Learning Organization Types

Add Learning organization types to categorize your Learning organizations according to your business and make them easier to find for learning administrators.

Context

Organization types are a way for you to categorize your organizations. They populate the picklist in *People* > *Organizations*. For example, you can create corporate organizations or dealership organizations. When you search for organizations, you can search by type.

Procedure

1. Go to Learning Administration, and then go to *References* > *People Management* > *Organization Types*.
2. Click *Add New*.
3. Add an ID and a description that fits the employee status types that you want to use in assignment profile rules.
4. Click *Add*.

18.3.2 Adding Course Completion Status

Add course completion status to control whether users receive credit for their courses or don't receive credit and can determine if users receive follow-up surveys.

Prerequisites

Add item types before you add completion status values.

Context

Completion status is a central element of SAP SuccessFactors Learning. It determines whether your users receive credit for their courses and if they receive follow up evaluations or an approval process. For example, when learning administrators record learning for an employee, they can record a completion status of "pass" or "fail". That completion status can then trigger:

- Follow up evaluations - for example, a passed course might send a follow up evaluation to users and managers to see how learners applied their new skills but a failed course might not.

- Approval processes - if you enabled e-signatures, which is common for validated customers, you can send approval processes after users receive a completions status. The approval process is a secondary validation that the user passed or failed the course.

> → Tip
>
> Keep your list of completion statuses small to avoid complexity in your system. Many companies can use simply “pass” and “fail”.

Procedure

1. Go to Learning Administration, and then go to *References* > *Manage Users Learning* > *Completion Status*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps administrators understand the completion status.
4. In *Item Type*, select the item type that can use the completion status.

   To create structure around completion status, SAP SuccessFactors Learning uses item types. Item types are a category of course that makes sense for your company (for example, “on the job training” or “certification course”). Each item type can have one or more completion status that you define. For example, a certification item type might have strict completion status of pass and fail, but a professional development item type might have completion status of pass, fail, and incomplete.
5. Select the *Credit Given* if you want to give users credit when they get this completion status.

   For example, you require a user to complete a course for credit with a completion status of Pass. If a user passes the course, then the item's completion status (Pass) appears with the item in the learners learning history, the user receives credit for completing the item, and the system removes the course from the user's learning assignments. If a user doesn’t pass the course, then the item remains in that user's assignments.
6. If you want to assign course satisfaction surveys to users after they earn this completion status, select *Include history records with this completion status for Course Feedback Surveys Assignments*.

   If a course has a satisfaction survey assigned, and if you select *Include history records with this completion status for Course Feedback Surveys Assignments*, learners see the satisfaction survey on their learning assignments.
7. If you want to assign follow-up surveys after users earn this completion status, select *Include history records with this completion status for Follow-up Survey: Surveys Assignments*

   If a course has follow-up surveys assign, the system automatically assigns the survey. The system automatically assigns this survey to users based on the threshold that you configure for the course.
8. If you need e-signatures as a secondary identity verification system, select *Enable electronic signature* and then select the approval process for e-signatures in *Approval Process*.

   You can require additional users, like managers and instructors, to verify a user's course completion. When a user electronically signs an item, the system notifies the approvers that they must also electronically sign the course.

   If you enable electronic signatures and identify an additional approval process for a completion status, then the system initiates the approval process and requires electronic signatures only if the associated learning event (for example, curricula or courses) has also enabled electronic signatures.

9. Click *Add*.

18.3.3 Adding Item Types

Add item types to control how users understand the type of learning item (course), the way that courses of this type are graded, and the cost of courses in this type.

Context

To change these values for item types, go to *References* > *Learning Activities* > *Item Types* > *Summary*.

Procedure

1. Go to LearningAdministration, and then go to *References* > *Learning Activities* > *Item Types*.
2. Click *Add New*.
3. In *Item Type ID*, type a unique ID for the learning item type. Don't use the'|'(Pipe) character while giving a name to the *Item Type ID*.
4. In *Description*, write a description that tells users what to expect for learning items (courses) of this type.

   For example, if you create a special type of courses for certification you might write the description **`If you are successful in these courses, you leave the courses with a certification. For example, you might leave with a Red Cross certification in Cardiopulmonary Resuscitation (CPR).`**

   If your user base includes users who speak different languages, we recommend that you localize the description. Localization is more than just translation. In this example, you might change **`Red Cross`** to **`Red Crescent`** for some cultures.
5. In *Grading Method*, set the default behavior for how learning items of this type are graded.
   - Select *Numeric* to grade users on a scale of 0-100.
   - Select *Value-Based* to grade users by a value (for example, by letters or by values like Above Average, Average, and Below Average).
   - Select *None* to exempt learning items of this type from being graded.
6. Click *Add*.

Next Steps

If you add an item type and use a grading option of *Numeric* or *Value-Based*, set the grading system for learning items of this type.

If you add an item type and use commerce features to reconcile the costs of training, set the default cost calculation for learning items of this type.

18.3.3.1 Adding Default Numeric Grading Rules for SAP SuccessFactors Learning Courses

Add default numeric grading rules so that all learning items of a type inherit the numeric grading options of the type.

Prerequisites

Create a learning item type and set its grading rules to numeric.

Create the completion statuses that users get when they complete the learning item for a grade (for example PASS or FAIL).

Context

In SAP SuccessFactors Learning, you set up a grading system during implementation. Specifically, you set up how different types of courses (learning items) are graded. If you choose to create a numeric grading system for a type of learning item, you set it up in *References* > *Learning* > *Item Types* and all learning items of the type inherit the grading system.

> **Note**
>
> You can allow learning administrators to override the grading system for individual learning items.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Learning* > *Item Types*.
2. Find and open the item type with the grading system that you want to edit.
3. Click *Grading Options*.
4. If this item type is not currently a numeric grading method, you can select *Numeric* in *Grading Method* and then click *Apply Changes* to switch it to numeric.
5. In *Add a Numeric Grade*, provide a numeric range and the completion status that users receive for falling into that range.

This Field...	Is Used as Follows...
Minimum	The low range that a user must have to get the completion status.
Maximum	The high range that a user must have to get the completion status.
Completion Status	The completion status that users are assigned if they fall into the range defined by *Minimum* and *Maximum*.

For example, if an administrator runs the *Record Learning* wizard to post completion for a course of this type, and if you specify that users with a minimum of 80 and maximum of 100 get the completion status "Certified", then every user who has a grade between 80 and 100 receives the "Certified" completion status.

6. Click *Apply Changes*.
7. Continue to add ranges until you have defined a point range for all completion statuses.

Next Steps

If you need to remove a range or if you made a mistake in the minimum or maximum, select *Remove* and then click *Apply Changes*.

18.3.3.2 Adding Default Value-Based Grading Rules for SAP SuccessFactors Learning

Add default value-based grading rules so that all learning items of a type inherit the value-based grading options of the type.

Prerequisites

Create a learning item type and set its grading rules to value-based.

Create the completion statuses that users get when they complete the learning item for a grade (for example PASS or FAIL).

Context

In SAP SuccessFactors Learning, you set up a grading system during implementation. Specifically, you set up how different types of courses (learning items) are graded. If you choose to create a value-based grading system for a type of learning item, you set it up in *References* > *Learning* > *Item Types* and all learning items of the type inherit the grading system.

> **Note**
>
> You can allow learning administrators to override the grading system for individual learning items.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Learning* > *Item Types*.
2. Find and open the item type with the grading system that you want to edit.
3. Click *Grading Options*.
4. If this item type is not currently a value-based grading method, you can select *Value-Based* in *Grading Method* and then click *Apply Changes* to switch it to value-based.
5. In *Add a Value-Based Grade*, provide a value and the completion status that users receive for that value.

This Field...	Is Used as Follows...
Value	The value that users must get as a grade for the learning item.
Description	Add a description to help users understand the value.
Completion Status	The completion status that users are assigned if they receive the value.

   For example, the values can be "Pass", "Fail", and "Incomplete". Write a description to tell graders what these values mean in the context of this course type. For example, in the context of certification, "Pass" might means specifically that the user passed the certification test.

6. Click *Apply Changes*.
7. Continue to add values until you have defined a value for all completion statuses.

Next Steps

If you need to remove a value or if you made a mistake in a value, select *Remove* and then click *Apply Changes*.

18.3.3.3 Adding Default Cost Calculations for SAP SuccessFactors Learning Courses

Add default cost calculations so that learning items of this type inherit the cost structure and the formula used to arrive at the cost.

Context

If you're using commerce features to track the cost of learning items, then you set up the cost formula on learning item types so that each individual learning item based on this type gets the same cost formula. You can allow administrators to override the cost formula on individual learning items.

> **Note**
>
> We describe the default cost names and their default usage and behavior.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Learning Activities* > *Item Types*.
2. Find and open the item type with the cost calculations that you want to edit.
3. Click *Cost Calculation*.
4. In the *Add a Formula* section, select a *Cost Name*.

   A common configuration uses *ItemCreationCost* as the cost formula. If you search for it and it, then SAP SuccessFactors Learning also adds *ItemInitialCost* and *ItemMaintenanceCost* because the creation cost is the sum of the initial and maintenance costs.
5. Select a currency for the cost in *Currency*.
6. Click *Add*.

   When you create learning items of this type, the learning item inherits these cost variables. You're signaling that you want all learning items of this type to calculate their costs with these variables.
7. After you've added all cost names, you can add amounts to the costs in the cost names table.

   If you add amounts to the cost name, then learning items of this type inherit the costs. You can give administrators the permission to override the cost on individual learning items.
8. Click *Apply Changes*.

18.3.3.4 Course (Learning Item) Types

Item types are a critical category of SAP SuccessFactors Learning because they determine users' completion status and the base cost of courses.

Each company creates its own set of item types, and the set describes the categories of learning items (courses) for the company. For example, your company might have on the job training, a mentoring program, certification courses, and professional development courses. You can create an item type for each category of learning item.

You typically import item types during implementation and then review them periodically. To see your item types, go to SAP SuccessFactors Learning administration and then go to *References* > *Learning Activities* > *Item Types*.

> → Tip
>
> Keep your item types to a minimum because item types add complexity to your system. A single item type (COURSE) is enough for many companies. COURSE can have grading options and completion statuses of PASS and FAIL because many customers are interested only in whether users passed or failed the course.

Item types serve an additional purpose: you can create a cost calculation for each item type so that knows how to charge for this category of course (learning item). You set cost calculations in *Cost Calculations*. *References* > *Learning Activities* > *Item Types* > *Grading Options*.

18.3.4 Adding Assignment Types

Add assignment types help users understand the relative importance of a learning assignment.

Context

An assignment type informs how critical a user's assignment is to the user because each assignment type can be associated with a priority. Even if an assignment type is **not** associated with a priority, users generally understand that an assignment whose type says it is "required" demands their attention more than one that is "optional."

Procedure

1. Go to Learning Administration, and then go to *References* > *Manage Users Learning* > *Assignment Types*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps others understand the assignment type.
4. Add a priority to help learners understand the relative importance of the assignment.
5. If this assignment means that a course must be complete for a learner to complete its curriculum, select *Required*.

When the assignment type is associated with a learning item in a curriculum, the assignment type determines whether or not the learning item must be complete for the curriculum to be complete: if the assignment type is set to required, then the item must be complete for the curriculum to be complete.

6. Click *Add*.

18.3.5 Creating Course Categories (Subject Areas)

Create categories to add to learning activities so users can browse their library by category.

Context

Categories help your users discover learning that might help them. For example, they might be interested in taking a management position, so they might want to browse management courses.

If you have many categories to create at once, you can import them from a Microsoft Excel worksheet as part of the importing references process. For example, if you are setting up categories for the first time, you might want to import them. However, if you have already set up your categories, and you are just adding one or two, you might want to add them this way:

Procedure

1. Go to SAP SuccessFactors Learning Learning Administration, and then go to *References* > *Learning Activities* > *Categories*.
2. Choose *Add New*.
3. Choose whether you are adding a root level category or a child level category.
   - Select *Add Root Level Category* if you adding a top-level category that has sub-categories. For example, you can create a Human Resources root level category and add sub-categories like People Management, Hiring, or Conflict Resolution.
   - Select *Add Child Level Category* if you are adding a child to a parent category. For example, if the Human Resources category already exists, and you want to create a Conflict Resolution category under it, select *Add Child Level Category*.
4. Enter a Category ID.
5. Add a description in the *Description* field.

   The description field is used as the category title in the browse list. If the description field is left blank, the category won't appear on the list. If your users speak multiple languages, we recommend that you localize the description so that users can read the description in their native languages.
6. Type a longer phrase to describe the category in *Banner Description* (applicable in legacy search only).

   When users select the category in legacy search, they see the banner description under the description, as a subtitle to the category.

7. Select a color for the subject area in *Color* (applicable in legacy search only).

   In some views in legacy search, subject areas are called out by color. These colors help users quickly identify the subject areas that interest them.
8. When finished, choose *Add*.
9. If you mistakenly added the category as a root level, but you meant to add it as a sub-category to another, you can select the top-level category in *Parent Category ID*.
10. To see a preview of what users see when they browse the category (legacy search only), choose *Customize* and then look in *Banner Preview*. From here, you can also edit the *Banner Background Color*, *Banner Text Color*, and *Banner Background Image*.

Next Steps

Assign the categories you've created to learning activities: Adding Categories to Learning Activities [page 119]

18.3.5.1 How Competencies work with SAP SuccessFactors Learning Subject Areas

Add competencies to a subject areas so that users can understand how each subject area can help them gain a new skills or knowledge.

You add competencies to SAP SuccessFactors Learning so that users can close competency gaps. They want to enroll into a course to learn a new skill or gain some knowledge to close a specific competency gap. By closing competency gaps, they have better performance reviews and rise in the organization. You can associate competencies with subject areas so that users can filter by subject area when they search for competencies.

For example, an information technology employee might search for a “networking” competency to close a gap in knowledge about computer networks. The employee does **not** want to see courses in a business subject area for “networking” because the employee works for information technology and probably needs a course in the “Computer Science” subject area.

Related Information

Course Categories [page 591]

18.3.5.2 Course Categories Hierarchy

A hierarchy of categories (subject areas) creates sub-categories of learning opportunities.

Each category of learning opportunity can be divided into smaller categories. For example, you can create a "Business" category that has sub-categories of "Management", "Accounting," and so on. Each sub-category is

associated with its parent category through the *Parent Category ID* field in Learning Administration: *References* > *Learning Activities* > *Categories*.

We recommend avoiding deep category hierarchies, as it can make the navigation experience more difficult for users. For many applications, two layers are enough.

18.3.5.3 Course Categories

Categories organize SAP SuccessFactors Learning courses by their subject area to help users browse their list of available learning opportunities.

Learning categorizes courses by topics so that learners can browse their course catalogs by topics as facets and so that machine learning can recommend new courses that might interest your learners. For example, you might create a "Management" topic to help users browse by courses about managing employees and you might create a "Technology" topic to help users browse by courses that can help them learn a new technology skill. Learners can browse technology courses by the topic and the recommendation engine can recommend new technology courses if users are interested in them.

One way to think about categories is to think about them as search filters. Users can explore categories in SAP SuccessFactors in the same way that they explore shopping categories in an online store.

To view your categories, log in to SAP SuccessFactors Learning Administration and go to *References* > *Learning Activities* > *Categories*.

18.3.6 Adding Learning Date Format Patterns

Add Learning date format patterns if you cannot find a default date and time formats to control how your users experience dates and times in their user interfaces.

Prerequisites

Before you add a new date format pattern, search the existing patterns to see if it already exists. Most customers can use the default time and date format patterns because our locales already follow the cultural norms for showing times and dates. Go to *References* > *Calendars and Time* > *Date Format Patterns* to search for them.

Context

Date and time patterns control how different users in different cultures experience times and dates. For example, it is common for users in Germany to see a 24 hour clock but users in the United States to see a 12 hour clock. You can set the time pattern for German users to see their times in 24-hour format and U.S. users to see their time in 12-hour format.

When you add a new locale to Learning, we automatically add the date and time patterns for that locale.

> **Note**
>
> Learning date and time patterns are unique to Learning. They are not shared with other parts of SAP SuccessFactors.

Procedure

1. Go to Learning Administration, and then go to *References* > *Calendars and Time* > *Date Format Patterns*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps others understand the date pattern.
4. In *Pattern Type* select whether the pattern applies to dates or times.
5. In *Pattern*, use ISO syntax to define the pattern.

   For example, `M/d/yyyy`.
6. Click *Add*.

18.3.7 Adding Learning Number Format Patterns

Number format patterns control how users experience numbers in SAP SuccessFactors Learning: currency, decimals, and so on.

Prerequisites

Before you add a new number format pattern, search the existing patterns to see if it already exists. Most customers can use the default number format patterns because our locales already follow the cultural norms for showing integers, decimals, currency, and percentages. Go to *References* > *System Administration* > *Number Format Patterns* to search for them.

Context

Different cultures format numbers differently. For example, some cultures is a period (.) for their decimal separator and some use a comma (,). Furthermore, companies differ on how they want to present numbers. For example, you might want to round a decimal after three digits but another company might want to round after four. You control these differences with number format patterns.

You can control the following mathematical attributes of your numbers. Importantly, these attributes can affect things like cost distribution after a course. If for example, you divide a $100 course among three users, and if an administrator's maximum fraction digit for the dollar currency is two, then two users pay $33.33 and one user pays

$33.34. This is because the remainder is calculated after two decimal places. For this reason, if you create your own patterns, we strongly recommend that you standardize these two attributes.

> **Note**
>
> Learning number format patterns are unique to Learning. They aren't shared with other parts of SAP SuccessFactors.

Procedure

1. Go to Learning Administration, and then go to *References* > *System Administration* > *Number Format Patterns*.
2. Click *Add New*.
3. Select what type of numbers the new format pattern applies to and then click *Next*.
4. Add the pattern information.

   > **Note**
   >
   > Not all types of numbers use all pattern rules.

Choice	Description
Decimal Separator	Punctuation mark that precedes the decimal fraction in the number pattern format. For example, in 10.50, a period is the decimal separator.
Group Separator	Punctuation mark that separates number groups in a number pattern format. For example, a comma separator would generate the number 1,000,000. A period separator would generate the number 1.000.000.
Minimum Fraction Digit	Minimum number of digits allowed to the right of the decimal separator.
Maximum Fraction Digit	Maximum number of digits allowed to the right of the decimal separator.

5. Click *Apply Changes*.

18.3.8 Adding Registration Status

Add registration status to describe users' stage of the registration process.

Context

> ⚠ Caution
>
> In almost all cases, you should **not** add additional registration statuses. Instead, **use the default status values** because they align with the registration process. Adding additional registration statuses adds complication without value.

The default statuses are:

- Enrolled: Users in this status have space reserved for them in the course (scheduled offering).
- Pending: Users in this status are awaiting approval to enroll into the course.
- Waitlisted: Users in this status are approved to enroll, but the maximum enrollment has been met. If an enrolled user withdraws from the course, a waitlisted user can take that user's place.
- Cancelled: users in this status were previously enrolled but have withdrawn from the course.

Procedure

1. Go to Learning Administration, and then go to *References* > *Learning Activities* > *Registration Statuses*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps others understand the status.
4. Associate your status name with the existing default status.

   Registration status must be one of the four registration types: *Enrolled*, *Waitlisted*, *Cancelled*, or *Pending*, so that administrators can associate it with a class or a cohort. For example, you might want to create a special cancellation type called “Work Related Cancellation” for cancellations that are beyond the control of the user. If you create such a cancellation type, it must be associated with the state of *Cancelled*.
5. Click *Add*.

Next Steps

Click the translate button to edit the description.

19 Learner Profiles

A learner profile is all the information about a user that you need to work with the user in Learning as a Learning Management System (LMS).

Learning isn't the system of record for user or employee data. It is, however, the system of record for the users' learner profiles. Learner profiles are information about users that Learning needs so that it can assign courses and other learning opportunities, track users' progress in the learning opportunities, and report information back to the rest of the suite.

> → Remember
>
> Because SAP SuccessFactors Platform is the system of record for employee data, change employee data in Platform and allow it to update into learner profiles.

You import information from SAP SuccessFactors Platform to Learning through User Connector - SF. It runs nightly to keep user profiles current. You define how you want your profiles to work during implementation by the rules you set up in the connector.

19.1 SAP SuccessFactors Learners

SAP SuccessFactors users have a number of **profiles** for different modules. In Learning, you can view their profile as learners: courses that they're assigned, for example.

During implementation, you configure how you want to use data from SAP SuccessFactors Platform in Learning for the purposes of finding users and assigning courses. For example, you often assign courses based on the organization in their learner profile. During implementation, you map the field in Platform that should populate learners' organization for the purposes of assigning courses.

Common user attributes are unified across solutions through an event bus. When you look at users in Learning Administration, you see their attributes that matter for the Learning solution, plus some global information so that you can identify the user across SAP SuccessFactors.

> ⚠ Caution
>
> The Platform is the system of record for learners' information, so please adjust user information in Platform and let it come through the mapping to Learning to the learner profile.

19.1.1 User's Government Reporting

These fields help you complete Declaration No. 2483 for reporting to the French government.

This Field...	...is used as follows
Include in government reporting	You must select *Include in government reporting* to include this record as part of the Government Reporting Learning Events report.
DIF Hours	These are read-only, system-calculated values. For *Allocated*, the system pulls the information that was imported with the Import Data tool (*System Adminstration* > *System Management Tools* > *Import Data)*. For *Used*, the system uses the total number of hours recorded for this user for items where: • *Include in government reporting* is selected for the user • *Include in government reporting* is selected for the item (*People* > *Users* > *Government Reporting* tab) • An administrator selected *Default 2483 Program* when recording the learning event. The system uses the DIF Hours in reports and for calculating cost values.
2483 Legal Entity	If you select *Include in government reporting*, then you must also associate this record with 2483 Legal Entity record. The system also includes the 2483 Legal Entity information in relevant reports.
2483 Employee Class	You can associate this record with a 2483 Employee Class record so that you can use or refer to that information in a report.
Hourly Rate and Currency	You can associate this record with an hourly rate and currency so that you can use or refer to that information in a report and so that the system can use that information to calculate and report on training costs.

19.1.2 User Online Status Settings

Administrators can review online content that is assigned to users to troubleshoot issues and see their status.

To see users' online status, go to *People* > *Users* > *Online Status*.

To see the details of any one learning item, click its *Object Details* link.

This Field	Is used as follows
User has access to the online items	To remove a user's access to all online content, clear *User has access to the online items*. When you clear it, the learning items remain on the user's learning assignments tile, but they no longer have the *Go to Content* button.
Item	The online or blended course that is assigned or has been assigned to the user.
Initial Activity Date and *Last Activity Date*	The first time that the user engaged this online learning content and the last time that the user engaged this content. This information is useful for troubleshooting. For example, if you see a very old initial activity date, and a very recent last activity date, then you know that this user has kept this assignment for a long time and has recently returned to it.

19.1.2.1 System Rules for Completion in Content Status View

If administrators mark online content complete in *Content Status*, it changes completion status according to these rules.

If you, as an administrator, go to *People* > *Users* > *Content Status* for a user, and if you click *Object Details*, you can toggle the user's completion in the *Completed* column. When you do, you record completion according to these rules.

The system records the completion status if both of the following are true:

- *Content is available for launch (available to users)* is set on *Learning Activities* > *Items* > *Online Content* > *Online Content Settings* > *Launch*.
- *Add to History on Completion of All Content* is selected in *Learning Activities* > *Items* > *Online Content* > *Online Content Settings* > *Completion*.

If you select *Complete* for any individual **content object** in a learning item:

- The Learning Management System (LMS) marks **only** the content object complete.
- Users see the content object as complete in their view of the content structure.
- As an administrator, you can reverse the completion by selecting *Needs Review*. For any object that is finished, the LMS:
  - Clears the *Complete* checkbox.
  - Shows the users that the content object as incomplete in their view of the content structure.

Related Information

User Online Status Settings [page 596]

19.1.2.2 Online Learning Object Details Settings

You can view the status of any online learning content object, including assessments.

To see users' online status, go to *People* > *Users* > *Online Status*.

To see the details of any one learning item, click its *Object Details* link.

This Field...	...Has This Meaning
Type	This field shows the type of the content object (for example, an assessment or a learning content object).
Completed	To modify the user's completion status for a particular online item, click *Object Details*, select *Complete* for the item.
Needs Review	The *Needs Review* flag toggles the complete and incomplete flags on users' content structure pages. If *Needs Review* is true, then users see the content object as incomplete.
Has Access	The *Has Access*, flag toggles users' locked and unlocked status on the content object. If *Has Access* is true, then the object is unlocked for users. If it's false, then the object (assessment, content, or learning item) is locked. In most cases, you select *Has Access* when the system has locked users out of an object, the user has had a learning intervention, and you need to grant access again.

19.1.2.3 Clearing a Locked Exam or Learning Item for Users

Clear a locked exam or learning item for users when you've met with them and you decide that they should be granted access to the exam again.

Context

You can create remediation checks on exams or learning items. When you create an exam, you can set it to lock the exam or the entire item when users pass or fail the exam. In most cases, you clear locks when users have failed the exam, you've spoken to the users, and you've agreed that they should be granted access again.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *People* > *Users*.
2. Find and open the user with the locked exam.
3. Go to *Content Status*.
4. Locate the learning item with the exam that you want to unlock, and then click its *Object Details*.

5. In *View Item Objects*, locate the object that you want to unlock.
    - To unlock the learning item, select the learning item.
    - To unlock the exam, click the exam object.
6. Select *Has Access*.

Next Steps

In some cases, you also need to set flags in some content objects. This is especially true when the locked exam is an adaptive exam.

In some rare cases, you might want to set the learning item complete, which bypasses the exam and completes it directly.

Related Information

Locking or Removing Failed Online Courses [page 60]
Exam Assessment Settings [page 704]

19.1.2.4 Reviewing Exam Iterations

Review exam iterations when you want to see how users performed during their attempts at an exam.

Context

Each exam iteration is a record of a user's attempt at an exam. The iteration records the questions that were presented to the user, their sequence, the user's overall score, and details about the user's attempted answers for individual questions. You often look at an exam iteration to understand why a user did **not** perform well on an exam. It can be part of a remediation check: a conversation with the user to talk through problems with the exam.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user with the exam that you want to review.
3. Go to *Assigned Items*.
4. Locate the learning item with the exam that you want to unlock, and then click its *Object Details*.
5. In *View Item Objects*, locate the exam and then, under the exam, the iteration that you want to investigate.

6. In *View Exam Iteration*, look at the summary information to see if you are looking at the right exam iteration.

> → Tip
>
> Use the access dates (*Initial Access* and *Last Access*) to match the exam with the time that the user said that they completed the exam. Users do not know the which iteration they completed (the first, second, third, and so on), but they might know the times and dates.

7. In *View Exam Iteration Details*, click any individual question to see the user's interaction with the question.

19.1.2.5 Allowing Users Another Attempt to Pass Exams After They Exceed the Exam Attempts Limit

Allow users another attempt to pass exams after they exceed the exam attempts limit if you want to make an exception to the limit.

Context

In exams, you can limit the times that a user can attempt to pass an exam. If users can't pass the exam within the limit, they're marked finished and can't attempt the exam again. You can, however, make an exception and grant the access again.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user with the finished exam that you want to investigate.
3. Go to *Assigned Items*.
4. Locate the learning item with the exam that you want to review, and then open the additional actions menu and select *View Object Details*.
5. In the content structure in *View Item Objects*, click the exam.
6. In *User Status*, clear *Finished* and select *Has Access*.
7. Click *Apply Changes*.
8. Select *Return to Item Objects* to return to the content structure and then click the learning item to repeat the process on the learning item level.
9. In *User Status*, clear *Finished* and select *Has Access*.
10. Click *Apply Changes*.
11. Go back to the content structure and check the exam iterations. Previous exam iterations still show in the Object Details.
12. The user can now attempt the exam again.

19.1.2.6 Checking to see if Users Finished an Exam

Check to see if users finished an exam to see if they exhausted their exam attempts or if they passed the exam (and are now finished).

Context

You can set a limit to the amount of times that users can attempt an exam. When users reach the maximum number of attempts, they see a message that they've exhausted their attempts, but you might need to investigate their exam attempts. Users can also be finished with an exam if they pass the exam within the allowed attempts.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user with the exam that you want to investigate.
3. Go to *Assigned Items*.
4. Locate the learning item with the exam that you want to review, and then click its *Object Details*.
5. In the content structure in *View Item Objects*, click the exam.
6. In *User Status*, look at *Finished*.

   If *Finished* is selected, then the user is finished with all exam iterations for one of two reasons: either the user passed the exam in an iteration or the user couldn't pass the exam within the attempts set in the assessment.
7. In *User Status*, look at *Total Times*.

   This is the total times that the user attempted the exam. If it's equal to or higher than the *Exam Attempts* limit that you set on the exam and if the user failed the last iteration, then the user exhausted his or her limits on the exam.

Next Steps

It would be unusual, but if you want to clear the iterations and allow users to attempt the exam again, you can clear *Finished*.

19.1.2.7 Overriding Completion and Needs Review Flag Values

Override the system-set completion and needs review flags if you're troubleshooting an adaptive exam and you see that the exam configuration set the flags incorrectly.

Context

If an adaptive exam configuration causes flags to set incorrectly, you can override the flag values. The user can proceed and can continue with the exam while you investigate the exam. Additionally, you often want to override the flags while you're testing adaptive exams. An override allows you to set up a scenario that you can test.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user with the flags that you want to review.
3. Go to *Assigned Items*.
4. Locate the learning item with the content flags that you want to change, and then click its *Object Details*.
5. In the content structure in *View Item Objects*, click the object with the flags that you want to set.
6. In *User Status*, set the flags.
   - If users should review the content or assessment, select *Needs Review*. Users see *This object needs to be reviewed* on the learning item's content structure page next to this object.
   - If users have completed the content or assessment, select *Complete*. Optionally, you can specify a date that the user completed the content or exam, but if you don't set one, the completion is set to the current date and time.
   - If you want to make the object or exam **appear** on the content object page as though the user never attempted it, clear both *Needs Review* and *Complete*.
7. Click *Apply Changes*

> **Note**
>
> The interaction is a little confusing: you can select both *Needs Review* and *Complete* at the same time. This is an invalid selection, so SAP SuccessFactors Learning clears one of your selections when you click *Apply Changes*.

19.1.3 Troubleshooting Learner Purchasing Power

Troubleshoot learner purchasing power to see how they configured to purchase courses.

Context

Shopping accounts are central to the commercial settings of Learning so if you find problems with an individual's finance experience, start troubleshooting with the shopping account.

- Learners' purchasing power is controlled by their shopping accounts.
- Transaction history is stored by shopping account.
- The shopping account type controls the user experience of purchasing learning.

Procedure

1. Go to Learning Administration and then go to *People* > *Users*.
2. Find the learner who you want to troubleshoot and open it.
3. Go to *Finance*.
4. To disable the shopping account while you troubleshoot, clear *Enable Shopping Account*.

   When you clear *Enable Shopping Account*, learners can't use their shopping accounts. Without access, they can't, for example, use an incorrect shopping account. You can fix the account and then enable shopping again.

   > → Tip
   >
   > Learners often have trouble with purchasing because their accounts are disabled.

5. Look at *Shopping Account* to see which shopping account the learner is assigned and if it matches the account that is assigned to the learner.
6. Look at *Shopping Account Type* to see if the account type is internal or external.

   Shopping account types of internal are employees. Types of external are in your extended enterprise (external users).

   To change the user's purchasing experience, change their shopping account type. An external shopping account type is ideal in a retail environment because a user can add items to a shopping cart to submit one order that contains multiple items. If you select internal, then users can't submit orders that contain multiple items; instead, they must submit an order for each item.
7. Look at *Edit Shopping Account Payment Methods* to see the payment methods available to the user.

   Shopping account payment methods control the purchasing options of the user. Each payment method is a different way that the user can purchase learning items with their shopping account. For example, you might want to disable the user's ability to purchase with a credit card while leaving the overall shopping account enabled. You can do this by disabling the credit card payment method.
8. Go to *Edit Billing & Shipping Information* to look up the shipping and billing address of the learner.

If someone has a problem with their billing or shipping information, you can correct it. The shipping information is automatically inserted when a user purchases an item that has *Shipping Required* selected in the course.

Next Steps

To find all orders or unused vouchers for the shopping account, copy the shopping account, go to *Finance* > *Unused Vouchers*, and then look up all unused vouchers that are granted to the shopping account but not used.

19.1.4 Assigning an Account Code to Learners

Assign account codes to learners if you are using the Finance module of Learning, then you can authorize a user for an account code with this information.

Context

If you do not use Finance, then you do not use account codes.

Procedure

1. Go to Learning Administration and then go to *People* > *Users*.
2. Search for the user who needs an account code.
3. Go to *Account Code*.

   When you select an account code, learners can purchase items with the chargeback payment method and the purchase is reflected in the account.
4. Set the account code in *Account ID*.
5. If you centralize purchasing accounts organizations, select *User can use Org Accounts* and clear *Account ID*.

   Some companies charge learners' organizations as opposed to the learner themselves. If you have implemented Learning to charge costs to organizations, you can allow some learners to charge their learning costs to the organization.
6. To allow learners to use a user group account, select *User can use User Group Accounts*.

   A few companies assign account codes to user groups and use the user groups like organizations. If you have implemented Learning to charge costs to user groups, you can allow some learners to charge their learning costs to the user group.
7. Click *Apply Changes*.

19.1.5 Troubleshooting User Surveys

Troubleshoot SAP SuccessFactors Learning user surveys when a user is asked to evaluate a course and something is wrong with that evaluation (survey).

Context

Some learning items include a survey of participants at the end of the course. When the user completes the survey, it's automatically removed.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*
2. Find and open the user who has the problem with the survey.
3. Go to *Surveys*.
4. Find the survey that is causing the problem and investigate it.

   If you find the survey, ask the user to check his or her filters on the *My Assignments* tile. Many users accidentally apply a filter that hides surveys.
5. If you can't find the survey, go to *Learning Activities* > *Items*, open the learning item that assigns the survey and then go to *Surveys*.

   If there's no survey associated with the learning item, it could be that the user **expected** a survey but there are none associated with the learning item. For example, an instructor might have told a class to expect a survey, but the instructor might have been unaware that the learning item changed and no longer sends a survey.

   If you **do** see a survey in the learning item, ask the user to check his or her completed work. It could be that the user finished the survey but forgot about the survey.

Related Information

Adding Surveys to Evaluate Courses or Learners [page 102]
Learning Evaluation Types [page 116]
Translation Support for Learning Surveys [page 114]
Assigning Satisfaction Surveys After Learning Item Completion [page 112]
Adding Follow-Up Surveys to Learning Items [page 113]
Launching a Proxy Session to Troubleshoot Users [page 635]

19.2 Management of Learner Course Needs

Manage learner course needs to find and track how users are fulfilling their assignments and to manage the things that they must learn but are not assigned.

When you work with learners, most of your time is spent troubleshooting and fulfilling learning needs. You can look up individual users if they have a problem and you can fix it.

Most learning assignment and needs are **not** at the individual user. Most companies use assignment profiles to automatically assign courses to learners, catalogs to offer courses they can explore, and curricula to maintain qualifications.

19.2.1 Identifying Users by Learning Needs

Identify users by learning needs to see your users who have outstanding learning requirements.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. In *Items Needs*, use *Required After* and *Required Before* to create a date range.
   - Use *Required After* to find all requirements that are required after a date. For example, you can search for all users with courses that are required to be complete after January 1.
   - Use *Required Before* to find all requirements that are required before a date. For example, you can search for all users with courses that are required to be complete before January 1.
   - Use them together to find all requirements in a date range. For example, you can look for all users with courses that are required to be completed in the first quarter of the year (January 1 to March 31).
3. Narrow the search by any other filter.

   For example, you might want to look for users' learning requirements in a specific organization.
4. Click *Search*.

Next Steps

Consider exporting the search results to Microsoft Excel so that you can work with the data.

19.2.2 Launching the Registration Assistant from a User Record

Launch the registration assistant wizard from a user record to register or withdraw a specific user in or from a scheduled offering.

Context

If you launch the registration assistant from a user record, you skip the user selection steps of the assistant because SAP SuccessFactors Learning assumes that you want to register or withdraw the current user. Launch the registration assistant from the user record when you're investigating a user and want to take immediate action on his or her registration.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user who needs to be registered for or withdrawn from a scheduled offering.
3. In *Actions*, click *Registration Assistant*.

Next Steps

Follow the rest of the registration assistant to register or withdraw this user.

19.2.3 Viewing Users' Completed Items

Investigate the courses that learners have completed to see the learning transcript (learning history) for one learner.

Context

Each user has a transcript (learning history) and assigned courses (learning plan). As users complete assigned courses, they move to their transcript (learning history). Most configurations allow learners to see their own transcripts, but learning administrators can also see the transcript to troubleshoot problems or to answer questions about what a learner transcript.

Procedure

1. Go to Learning Administration and then to go *People* > *Users*.
2. Find and open the user who you want to investigate.
3. Go to *Completed Items*.

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

   If there are more than 1,000 records, the search results are restricted to only the entities seen in the user interface.

19.2.3.1 Items Completed Fields

When users complete learning, you can see the details of that completion in their learning history and investigate individual unit of learning by looking at the fields associated with that item's fields.

To see the details of the learning history line item, click *View Details*. To see the details of the content object, click *Object Details*.

This Field...	Is used as Follows...
Completion Date	The time and date that the user completed the event.
Completion Status	This is the status that users were granted at the end of the course. For example, pass, fail, or incomplete. The set of completion status values is unique to your organization.
Total Hours	Total hours are the number of hours that a user earned for completing a learning event. The hours can be inherited from the learning event (the course) or they can be specified when a user, manager, or administrator records completion with the Add Learning History wizard.
Contact Hours	Most customers don't record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use contact hours. Contact hours are the total number of hours that you expect a user to have contact with an instructor. For example, if you set up a learning item that is instructor-led with online content for 8 total hours and, for 6 of those hours, you expect the user to be in an instructor-led time slot, then the contact hours equals 6. The hours can be inherited from the learning event (the course) or they can be specified when a user, manager, or administrator records completion with the Add Learning History wizard.

This Field...	Is used as Follows...
CPE Hours	CPE is an abbreviation for Continuing Professional Education and refers to learning activities that users perform to maintain and expand the skills that their profession demands. Some customers in some industries use CPE hours for certification. If you are in an industry that uses CPE hours for certification, please use the *CPE Hours* field instead of credit hours or contact hours. If you are not in an industry that uses hours to certify employees, you can ignore CPE hours. The hours can be inherited from the learning event (the course) or they can be specified when a user, manager, or administrator records completion with the Add Learning History wizard.
Credit Hours	Most customers do not record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use credit hours. Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. universities, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equals 45; however, the college grants 3 **credit hours** for this class. The hours can be inherited from the learning event (the course) or they can be specified when a user, manager, or administrator records completion with the Add Learning History wizard.
Percentage Grade	The grade assigned to the user for the item's completion.
Comments	Comments are added at the time that the event is recorded, typically by an administrator or supervisor.

19.2.3.2 How Learning Events Move to Learning History

A learning event can move from a user's learning assignments to his or her learning history in these ways.

A "learning event" is a generic term that covers a broad set of "things a user has done to learn something." A learning event can be anything from an online course, to a seminar, to a book or video. It is anything you want to credit the user for completing in an official way. When users receive official credit for completing an event, the event appears on their learning history. They can see it in their History tile, Supervisors can see it in *My Team* and administrators can see it in *Manage Users Learning* > *Edit Learning History* . appear in these places in the following ways:

- An administrator, a supervisor, or the users themselves can run the Record Learning wizards. The Record Learning wizard is typically used when the system cannot know a user's completion status. For example, if a user attended a seminar at a local university and brings a certificate of completion to a supervisor, the supervisor can record the user's completion because the university does **not** post electronically a completion status to SAP SuccessFactors Learning.

- The system can record the learning automatically. Automatic record keeping is typically used with courses that are completely online: for example, a course that a user completes with an exam for a grade. In this case, the course is able to electronically post the completion status to SAP SuccessFactors Learning. When the user completes the course, it is automatically recorded in the learning history.

Related Information

Add Learning History with Finance [page 239]
Add Learning History for Multiple Courses [page 245]

19.2.4 Viewing a User's Assigned Learning Items (Courses)

View users' assigned learning items when you want to troubleshoot issues with their learning plans.

Context

A user's learning plan is everything that the individual user is scheduled to learn: all the learning items, classes, curricula, programs, or anything else that they're assigned as an individual for the purposes of training. In general, what you see in a user's learning plan shows up in the user's learning assignments, but a user's learning assignments can contain assignments that aren't training, things like approval requests.

Four filters can be applied to the user's assigned items:

- *Completed*: This displays the completed free floating items, completed program-based items and curricula-based items. For curricula-based items, this includes items that are completed and retraining is zero and expired.
- *Requirements*: This displays the assignment types where Required is selected. This filter is selected by default.
- *Other Needs*: This displays the free-floating items that are incomplete, incomplete programs items, and curricula-based items. For curricula-based items, this includes items that are incomplete, items that require retraining, or items that aren't expired. This filter is selected by default.
- *All*: This includes the results of all the three filters.

The user's assigned items are filtered by default, displaying items categorized as *Other Needs* and *Requirements*. You can adjust the filters, sort results, or search for specific items. The results are limited to the first 1,000 records that meet the search criteria.

> **Note**
>
> If you customize the filter and then navigate away from the *Assigned Items* tab, the default filters are applied when you navigate back.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user that you want to troubleshoot.
3. Choose the *Assigned Items* tab and adjust the default filters, sort results, or search for specific items as needed.

Next Steps

Cross-check the learning items you see with the curricula assigned to users on the *Curricula* tab and with the learning items that users completed on the *Items Completed* tab. A common problem is double-assignment: users are assigned a learning item through curricula, but then the learning item is also directly assigned by another administrator. If you see, for example, a curriculum that assigns learning items and also that same learning item in both the completed and assigned areas, it can indicate a duplicate assignment.

19.2.5 Launching the Learning Needs Tool from a User Record

Launch the learning needs tool from user records if you are investigating an individual user and want to associate this user with one or more learning needs.

Context

If you want to associate multiple users with multiple objects, you can run the User Needs Management wizard to make the associations in batch. For example, you can add or remove curricula, items, competency profiles, or competencies to one or more user records. If you are investigating a user and you see that the user needs multiple assignments, then you can click launch the learning needs tool directly from the user record.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user who needs multiple assignments and open the record.
3. In *Actions*, click *Assign Learning Needs*.

Next Steps

Follow the rest of the learning needs tool to register or withdraw this user.

19.2.6 Adding SAP SuccessFactors Learning Alternate Job Classifications to Users

Add SAP SuccessFactors Learning job classifications to users when you use them to assign learning to users.

Context

You typically add alternate job classifications when users might need the curricula or competencies that aren't associated with their primary job classification **and** you're using SAP SuccessFactors Learning job classifications as part of the assignment criteria and you want a user to get the curricula of more than one job classification.

> → Tip
>
> When you search for users by job classification, the system returns users who match the criteria for **primary** job classification. If you don't find the users you expect, try searching by alternate job classification.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user who you want to edit.
3. Go to *Alternate Job Classifications*.
4. Choose *add one or more from list* to find and add alternate job classification to the user.

Example

For example, you could have two job classifications: "Shop Manager" and "Safety Leader." If you need the shop manager to have the curricula or competencies of a safety leader (for example, to improve the safety on the shop floor), then you can create an assignment profile with two groups. One group would be based on a primary job classification (safety leader), and the other group would be based on an alternate job classification (shop manager). You would add the competency profiles and curricula that a safety leader needs. When you execute changes for the assignment profiles, all of the current users who are associated with Safety Leader as their primary job classification or alternate job classification would receive the competency profiles and curricula associated with the assignment profile. Any users whose attributes change so that they would be part of the assignment profile would also receive the competency profiles and curricula the next time that the Assignment Profile Execute Updates automatic process executes.

19.2.7 User's Assigned Items Settings

When you add learning to users' learning plans (their assigned items), you manage the settings of each individual unit of learning. This topic describes the settings you can change.

This Field...	...Is used as follows
Required Date	The date that the user must complete the course, curriculum, or other learning unit. The system uses the required date to calculate the time remaining for the user to complete the assignment. Users see the required date and can use it to short their assignments.
Assignment Type	An assignment type informs how critical a user's assignment is to the user because each assignment type can be associated with a priority. Even if an assignment type is **not** associated with a priority, users generally understand that an assignment whose type says it is "required" demands their attention more than one that is "optional." Assignments are enumerated in *References* > *Manage Users Learning* > *Assignment Types*. They are visible to the user and can be localized.
Days Remaining	The number of days remaining from now to the required date.
Completion Date	If the user completed the assignment, the day it was completed.
Curriculum	If the assignment is from a curriculum, the associated curriculum.
Origin	How the assignment came to be on the user's learning plan.
Assigned	When the item was assigned.
Failure Date	The day the user took the assigned item and failed.

19.2.8 Viewing Learner Registration Process Status

View learner registration process status to troubleshoot issues with an individual learner and all the classes that they are in the process of registering into.

Context

Registrations work with learning assignments and curricula: learning assignments show the courses that learners must complete, the curriculum assignments are the curricula that a learner must complete. Registration is the process that enrolls learners into classes to fulfill an assignment or a curriculum requirement.

> ⓘ Note
>
> When you look at registrations, pay attention to the status. Status tells you where the learner is in the process of registration. It could be that a learner is having problems with a registration because it is stuck in the wrong status.

Procedure

1. Go to Learning Administration and then go to *People* > *Users*.
2. Find and open the user that you want to investigate.
3. Go to *Registration*.

19.2.9 Checking Users' Library Access

If you need to troubleshoot users' libraries, start by checking the libraries that a user can access.

Context

When you preview the user's libraries, you do **not** see the fully featured library. You don't, for example, see the carousels or cards that the user experiences. The purpose of this preview is to see which courses came from which libraries.

If you want to see the fully featured library as the user sees it, proxy into the user's account.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *People* > *Users*.
2. Find and open the user whose library you want to preview.
3. Click *Library Access*.

   > → Tip
   >
   > In the default configuration, *Library Access* is hidden because it's infrequently used. You might need to click *More* to find *Library Access*.

   After you click *Library Access*, you see the list of libraries that a user has access to. Users can see the union of courses from all of these libraries: if a course is any of the libraries, a user can see it.
4. To see the courses in individual libraries, select the libraries' *Preview* checkbox and then click the *Preview* button.

Next Steps

If you see that users have access to a library that they shouldn't have access to or that they're missing access that they should have, you can fix the access issue in assignment profiles. In the user's record, go to *Assignment Profiles*. You might recognize an incorrect assignment profile immediately. If not, click each assignment profile to open it and then click the assignment profile's *Libraries* to see the libraries that it assigns.

Related Information

Checking Users' Library Access [page 614]
Launching a Proxy Session to Troubleshoot Users [page 635]

19.3 Using Learning to Look Up Learner Profile Information

When you look at your users or employees through Learning, you're looking at their Learning profiles: the information that Learning stores so that you can find, contact, and assign courses to the people in your system.

You most often go to Learning Administration and look at users (in *People* > *Users*) to see the information that Learning has stored about the learner. Because you map data from Platform to Learning, the information isn't exactly the same. For example, learners are often assigned courses based on the Learning **organization**. But the organization you use for learning assignment isn't usually the same as you use other places in SAP SuccessFactors HCM suite. To understand actions like assignment, therefore, you often look at the **Learning** view of users.

19.3.1 Looking Up Learner Phone Numbers in Learning

Look up learner phone numbers in Learning if you're already in Learning Administration and you want to contact a learner about assignment or if you're troubleshooting a mapping issue from Platform to Learning.

Context

Don't update user phone numbers in Learning. Instead, update them in Platform and allow User Connector - SAP SuccessFactors to update them through the mapping and business rules that you configured.

Procedure

1. Go to Learning Administration and then go to *People* > *Users*.
2. Find and open the user who you want to investigate.
3. Go to *Phone Numbers*.

19.3.2 SAP SuccessFactors Learning User Details Fields

This topic contains the fields that appear in the *User Details* tab of the user entity and their descriptions.

Personal Information

> → Remember
>
> You can edit these fields only for native users. For integrated users, the content for *Personal Information* and *Employment Information* is fetched from the user's core HR system, where employee records are maintained by the organization.

Field Names	Descriptions
First Name	Given name of the user.
MI	Middle name of the user (optional).
Last Name	Family name of the user
Address	Address of a user. When you create an external form for the user, the form is automatically populated with the user's address. The address or portions of the address can be used as an attribute to match users to an assignment profile. The address information that you add is included in any reports that include the contact information for the user. If you're using learning commerce, the shipping address of the user is handled separately, in *Finance* > *Order Management Finance* > *Finance*.
City	Address of the user.
State / Province	Address of the user.
Postal Code	A code used to identify the user's geographical area.
Country/Region	Address of the user.

Field Names	Descriptions
Region	When you assign a region: • Users can filter their library, or Find Learning search results to courses that are close to them, making attendance easier. • The *Class* tile recommends classes that are in the user's region. As an administrator, you can use the user's region as an attribute for an assignment profile or as a filter for searches and reports.
External ID	*User ID* given when adding the user from the Learning User Interface, or from the Learning Connector-SF input file.
Email Address	We recommend that you enter the user's e-mail address so that they can receive important notifications. The user's e-mail address appears in any reports that include their contact information.

Employment Information

> → Remember
>
> You can edit the following fields on the *User Details* tab only for learning-only users. For integrated users, the *Primary Manager* and *Organization* fields are read-only and can't be edited on the *User Details* tab. To update their values in Learning, you can use the *User Connector - SF.*

Field Names	Descriptions
Job Title	A job title to be more specific than a job code. For example, a user's job code might be "Mechanic" and the job title might be "Transmission Specialist."
Employee Status	Use employee status with assignment profiles to automatically assign courses to users based on their employee status. It is a description, matched to your business, of the current relationship of the employee to the business. For example: full time, family leave, disability leave, and so on. You often want to assign courses by these categories.
Job Location	In SAP SuccessFactors Learning, job locations are a simple list of places where users work. Job locations are almost always mapped to your Human Resources (HR) system of record. To see your list of job locations as they were imported to SAP SuccessFactors Learning, go to *References* > *Geography* > *Job Locations*.

Field Names	Descriptions
Organization	There are several benefits of associating a user with an organization including, but not limited to, the following: You can use organization to find all users who are associated with a specific organization. You can reserve a number of class seats for users who belong to a specific organization (*Learning Activities* > *Classes* > *Registrations*). You can create an assignment profile that returns users who belong to an organization and associate the curricula, competency profiles, libraries, roles, or performance reviews of the assignment profile to those users. You also associate users with organizations so that organization owners can access the organization dashboard for their organizations in the user interface.
Is Full-Time	In SAP SuccessFactors Learning, the user attribute *Is Full Time* is a legacy attribute. It was added to support Plateau Compensation, a product that we no longer support. Instead of using *Is Full Time* to indicate that someone is a full time user, please use *Employee Type* instead. *Employee Type* is a more accurate and more powerful way to categorize your employees because you can, for example, add employee types of Full Time Contractor and Full Time Employee: both work a full week but one is an internal employee and the other is a contractor. When you assign learning, therefore, you can more accurately target the assignment with (for example) full time users who are internal, full time users who are contractors, or both.
Hired Date	Date to record when the user was hired or the date that the user started their employment with your company. It helps in calculating the user's benefits or severance pay, or in customizing a report to include that data.
Termination Date	Date to record when the user's employment at your company ended. It helps in calculating the user's benefits or severance pay, or in customizing a report to include that data.
Job Code	Job codes are an object in the system. When you assign a user a job code, it affects the items and curricula that are assigned to a user.
Employee Type	Use employee type with assignment profiles to automatically assign courses to users based on their employee type. Employee type is a description, matched to your business, of

Field Names	Descriptions
	how you categorize employees. For example: student intern, contractor, part time, full time, and so on. You often want to assign courses by these categories.
Regular/Temporary	The *Regular / Temp ID* is a Learning attribute that is custom-built for the training planner. Few customers use training planner, so most customers can ignore it and instead use *Employee Type*. Employee types are more common and they map to standard a standard Platform field (`EMPLOYEE-CLASS`). Ignore *Regular / Temp ID* if you do **not** use training planner.
Primary Manager	A Learning manager in SAP SuccessFactors HCM suite Learning is primarily responsible for the learning of their direct reports, including: • Approving registration or withdrawal from courses. Not all customers configure registration approval processes, but among the customers who do configure them, many configure the manager as an approver. When primary managers change, you can reroute their approvals: associate the new manager with the users' past, current, and future approvals. • Managing training for their direct reports. Managers see *My Team*, where they can, for example, enroll their direct reports into courses on their behalf. • Completing third level surveys to show that their direct reports apply what they learned in their courses. Not all customers use third level surveys, but among those who do, managers are often asked to complete the surveys. Many customers also empower Human Resources Business Managers (HRBP) and matrix managers to do similar things. In Learning, these types of managers are called alternate managers. You empower managers through *My Team* permissions: *System Administration* > *Security* > *Role Management* > *Permissions*. You must globally enable electronic signatures (*System Administration* > *Configuration* > *Global Application Settings*) to reroute e-signature approvals. If you disable electronic signatures, then this option isn't available when you select which approvals to reroute to a user's new primary manager.

Access Settings

Field Names	Descriptions
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Status	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.

Security

Field Names	Descriptions
Related Admin	Assignment of related administrators to users to correct user configuration issues.
Role	The role you select determines the user's access in the user interface. A role sets the limits to what the user can view and edit in the user interface. For example, if the user is a manager, you should make sure that the manager has viewing and editing access (*System Administration* > *Security* > *Role Management* > *Permissions*) to the *My Team* section (in the user interface) so that they can fulfill the duties of a manager. If a user's attributes match the attributes associated with an assignment profile, the user is assigned to the assignment profile's role.
Login Site	The Login Site URL is the system-generated URL assigned to the site and used by an external user to access some functions of the user application.

Field Names	Descriptions
Related Instructor	Option to associate an instructor record with a user record to allow users to perform instructor-related tasks in the user interface. For example, if a history record requires an e-signature approval and includes the instructor as a required approver, then a user can enter their e-signature to approve the event. As an administrator, you benefit from associating an instructor record with a user record because you can add Related Instructor or Related User search options in SAP SuccessFactors Learning Administration by choosing *Add/Remove Criteria*. This search criteria is useful when you know one ID but not the other (for example, you know the Instructor ID but not the User ID.) The related instructor and related user relationship is a one-to-one relationship. Therefore, the system prevents you from associating a user with an instructor who is already associated with a different user (and vice versa). The related instructor and related user relationship is also a write-write relationship, which means that when you enter or modify an instructor ID in the *Related Instructor* box on the *User Details* tab of a user record, the system automatically writes the associated user ID to the *Related User* box on the *Summary* tab of the Instructor record.

Custom Fields

You can have any number of custom fields with custom labels.

Administrative Use Only

Field Names	Descriptions
Site Registration Code	Registration code to sites to limit the users who can sign up. Users must provide the code to register for the site.
License User Type	The type of license used by the user.
Gamification User ID	User ID given in *Gamification Settings*.

Field Names	Descriptions
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.

Other Fields

Field Names	Descriptions
New Password	New password provided by administrator on behalf of the user.
Verify Password	Confirmation field for the new password.
Native Deeplink User	Option to indicate whether or not the user is a native Learning user. Depending on how you set *Native Deeplink User*, you mark the user as either coming in from SAP SuccessFactors HCM suite through the connector or a user who is native to learning. Your user base can be mixed, with some SAP SuccessFactors HCM suite users and some native Learning users.
Locked	Option to lock the administrator to prevent them from logging in to SAP SuccessFactors Learning.

Related Information

Purpose of User Connector - SF

19.3.2.1 SAP SuccessFactors Learning Native Deeplink User

How you set native deeplink controls how Learning recognizes both link redirects and also how it recognizes the user as native or not native.

Depending on how you set *Native Deeplink User*, you mark the user as either coming in from SAP SuccessFactors HCM suite through the connector or a user who is native to learning. Your user base can be mixed, with some SAP SuccessFactors HCM suite users and some native Learning users.

- If the user is native to Learning and has no record in SAP SuccessFactors platform, set *Native Deeplink User* to *Yes* or true.
- If the user is not managed in Learning but is instead is managed in SAP SuccessFactors platform, set *Native Deeplink User* to *No* or false.

Native Deeplink Effects on URLs

Stand-alone customers' users are tagged as *Native Deeplink* users. This tag changes the way that URLs are constructed for the users' deeplinks. If those users later become part of an integrated environment, their URLs continue to be formatted for a stand-alone environment, and so they break in an integrated environment. By enabling the redirect, SAP SuccessFactors redirects them from the stand-alone URL to the integrated URL.

Native Deeplink Effects on Delete Inactive Native Users Automatic Process

The delete native inactive users automatic process deletes users who are **not** part of SAP SuccessFactors platform. The process uses the value of *Native Deeplink* as one way to distinguish between platform users and native users. If you set *Native Deeplink* incorrectly, the process can skip native users who should be deleted and delete platform users who should **not** be deleted.

19.3.2.2 SAP SuccessFactors Learning Student ID

The student ID is unique to SAP SuccessFactors Learning, which uses it to create a learner profile.

As an administrator, you usually don't need to think about student ID as separate from users' employee ID because in most cases, they are an exact match and in most cases where the difference matters, SAP SuccessFactors makes an intelligent choice about which to use. However, in some error cases, you might need to know about the difference.

ID Mismatches

The most common error with Student ID is when the Student ID does not match the SAP SuccessFactors platform ID. A mismatch can break interactions between Learning and other parts of SAP SuccessFactors.

Mismatches are rare because we import users from SAP SuccessFactors platform to Learning and use the platform ID as our Student ID. If you create all your users in platform and allow the import to run normally, you won't have a problem. If, however, you create a new user ID in Learning, instead of in platform, there won't be a match because the user is **not** imported from platform.

Global Assignment and Concurrent Employment

If you are using global assignment and concurrent employment, the system currently creates multiple Student IDs, so a learner's assignments and learning history are segregated based on employment, like all other Talent data.

> **Note**
>
> There are two types of employment licenses: Active and Functional licenses. If an individual with a Person GUID has multiple student IDs of the same license type, it counts as one single license, instead of having a separate license for each student ID. If there are two different license types for one Person GUID, it counts as two separate licenses. If there is no Person GUID, the license count is one, based on the license type.

19.3.3 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.

19.3.3.1 Managers in SAP SuccessFactors Learning

Learning managers oversee the training of their teams.

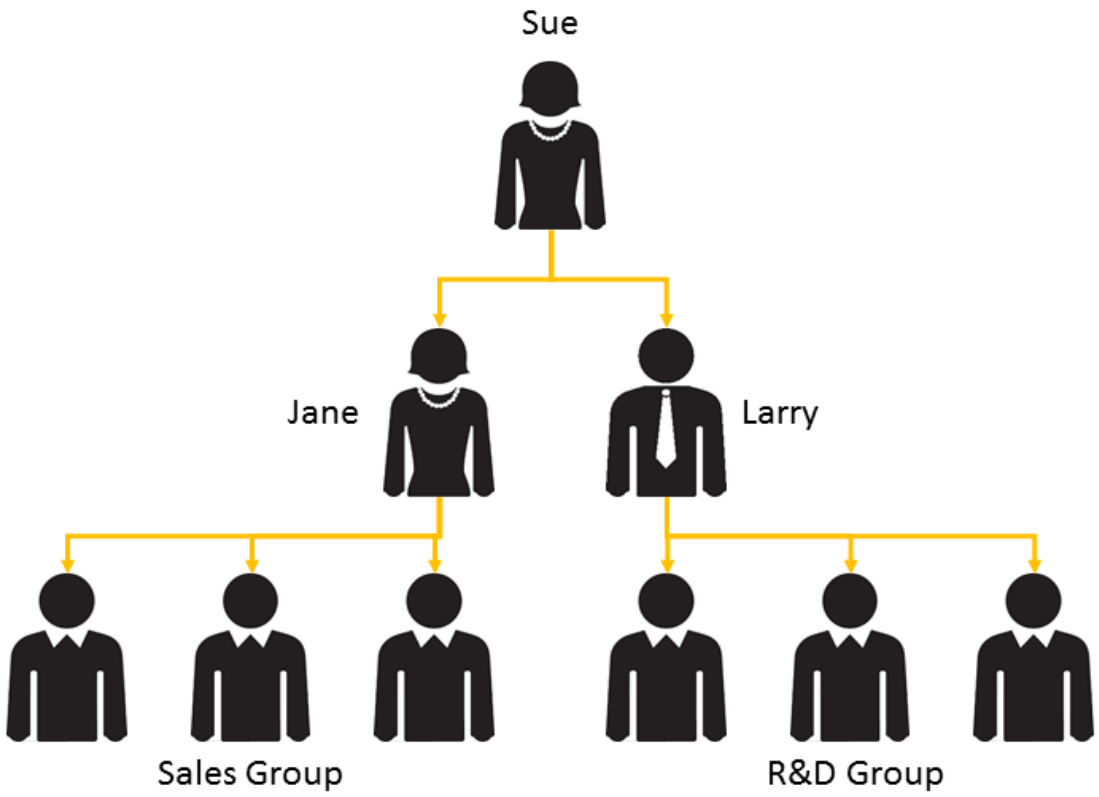
A Learning manager in SAP SuccessFactors HCM suite Learning is primarily responsible for the learning of their direct reports, including:

- Approving registration or withdrawal from courses. Not all customers configure registration approval processes, but among the customers who do configure them, many configure the manager as an approver. When primary managers change, you can reroute their approvals: associate the new manager with the users' past, current, and future approvals.
- Managing training for their direct reports. Managers see *My Team*, where they can, for example, enroll their direct reports into courses on their behalf.
- Completing third level surveys to show that their direct reports apply what they learned in their courses. Not all customers use third level surveys, but among those who do, managers are often asked to complete the surveys.

Many customers also empower Human Resources Business Managers (HRBP) and matrix managers to do similar things. In Learning, these types of managers are called alternate managers. You empower managers through *My Team* permissions: *System Administration* > *Security* > *Role Management* > *Permissions*.

Managers are defined as any user in *Users* > *Users* that has other users reporting to him or to her. The individuals reporting to the manager have the manager's user name in the *Primary Manager* field in their user record.

> **Note**
>
> If a manager, Human Resources Business Managers (HRBP), or an alternate manager wants to see details of their reportees, they can click *My Team* and then *Open Quickcard* to view *Employee Details*.
>
> If *General Display Name* is enabled, then the employee name will be displayed in the general display name format.



Example Reporting Structure

In this example, Sue, Jane, and Larry are managers. Each is a manager because another user lists him or her as a primary manager:

- If you go to *People* > *Users* and open any user in the Sales group, you see Jane in the *Primary Manager* field, so Jane is a manager.
- If you go to *People* > *Users* and open any user in the R&D group, you see Larry in the *Primary Manager* field, so Larry is a manager.
- If you go to *People* > *Users* and open Jane or Larry's user record, you see Sue in the *Primary Manager* field, so Sue is a manager.

Depending on your configuration, Sue and look in *My Team* and see into the Sales and R&D group users' learning information. Jane has sight into the Sales group, and Larry has sight into the R&D group. They can see the learning information of their reports in the *My Team* section of SAP SuccessFactors Learning.

Outside of *My Team*, managers are treated as any other learner. Jane, for example, is a learner as well as a manager: she has her own learning assignments **and** she manages the learning assignments of the Sales group as

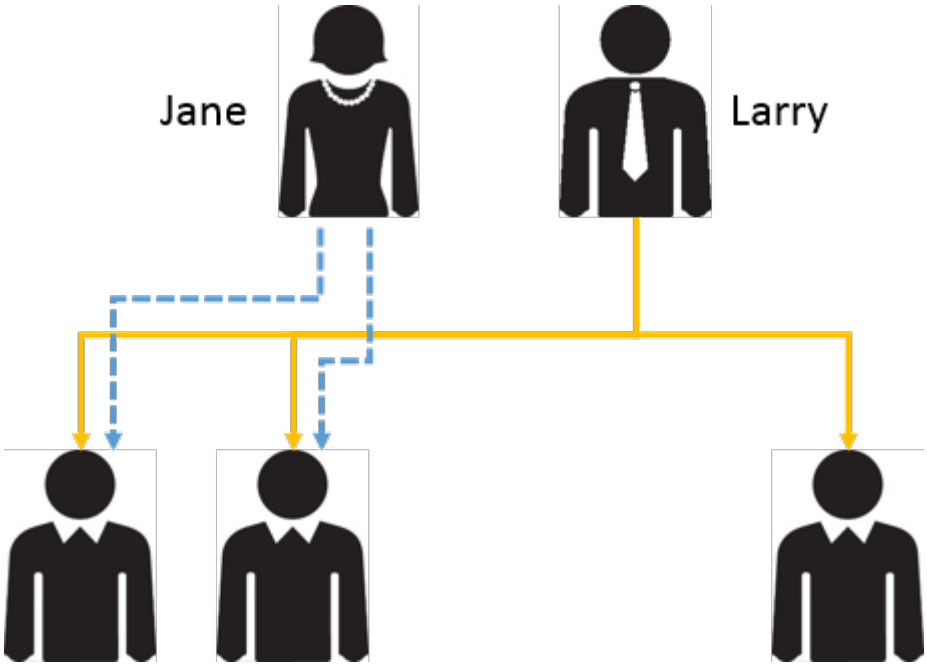
their manager. So Jane, or any other user in the system, is restricted by the value of her security role, as defined in the *Role* field on her user record.

19.3.3.2 Alternate Managers in SAP SuccessFactors Learning

When you assign an alternate manager to an employee, you share responsibility for the employee's training between the alternate manager and the primary manager.

When users report to an alternative manager for an extended period of time, you can transfer some responsibility to the alternate manager. Alternate managers are often used in dotted line relationships: matrix managers. A common example is when employees work on a project where they report to a project manager for the time of the project but their primary manager remains their manager in the *Manager* field.

To understand the example, imagine a manager named Larry who is responsible for the Research and Development (R&D) group. For a special project, two of his employees will be assigned to another Jane's working group. Larry is still the employees' manager, but Jane might want to assign the employees learning, might need to approve their requests, and so on. Jane can be an alternate manager.



Example Alternative Manager Structure

19.3.3.3 Human Resources Business Partner in SAP SuccessFactors Learning

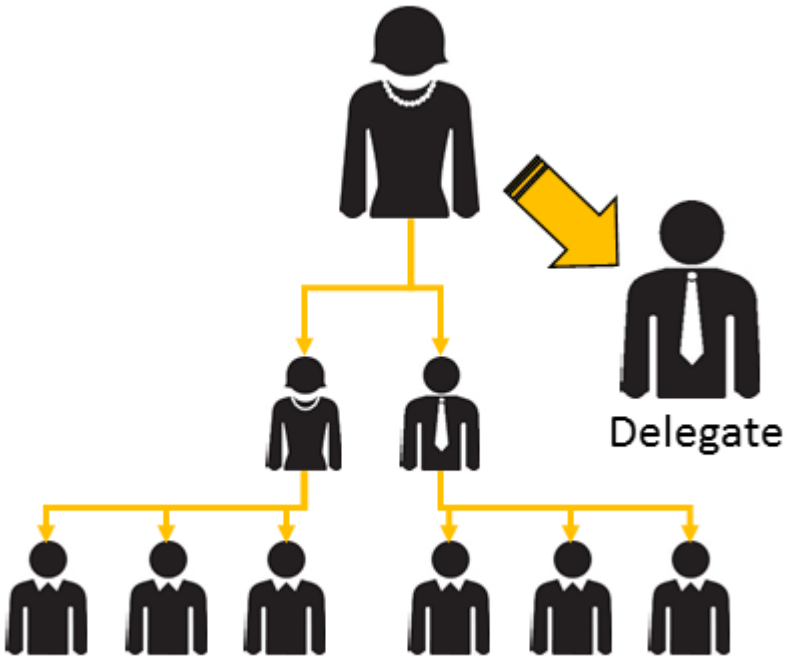
In SAP SuccessFactors Learning, a Human Resources Business Partner (HRBP) can share some of the supervisor responsibilities with a supervisor.

In organizations that have Human Resources Business Partners (HRBP), you can create a structure that includes an HRBP. The HRBP is an alternative manager in Learning: the HRBP shares the responsibility with managers as an alternate. But the HRBP is categorized differently so that the relationship can be more clearly understood.

19.3.3.4 Manager Delegate SAP SuccessFactors Learning

In SAP SuccessFactors Learning, a delegate is someone who takes on some responsibility for the manager.

Often, when a manager has a large team, the manager might want to delegate some responsibility to another user. For example, if Sue is a manager of a large team, and she has a trusted second-in-command named Joe, she can delegate some responsibility for training to Joe by making him a delegate.



Delegate Example

19.3.4 Looking up a Learner's User Group Membership

Look up a learner's user group membership so that you can troubleshoot Finance account activity or reserved seats in classes.

Context

Look up learners' user groups to troubleshoot Finance or enrollment based on user groups. For example, if users want to know why they don't get enrollment preference, and you think they should be part of a user group that gives them enrollment preference, you can check their user groups.

Procedure

1. Go to Learning Administration and then go to *People* > *Users*.
2. Go to *User Groups*.

Next Steps

If learners aren't part of the user groups that you expect them to be a part of, check the assignment profile that places them into the user groups. Go to *Manage Users Learning* > *Assignment Profiles* to check the assignment profile rules.

19.3.5 Setting Users' Learning Locale Preferences

Set the locale preferences for users' learning profiles to control their language, time zone preferences, and date and number formats.

Context

In SAP SuccessFactors Learning, locale preferences determine how the system displays information to the user in the context of Learning: what language, currency, time zone, and data patterns the user prefers. For example, a user might want to see the Learning user interface and help in German, see prices in Euros, and see times in a 24-hour format. In most implementations of SAP SuccessFactors Learning, learners control their own preferences but as an administrator, you can also set them.

> ⓘ Note
>
> We recommend that you set users preferences globally in SAP SuccessFactors platform because chances are that they want a consistent experience across all of SAP SuccessFactors. In many cases, you go to their preferences to view their settings.

> → Tip
>
> You can disable the ability of their users to change their locale settings by disabling the permission for your default user role. If you disabled users' ability to change their preferences, then you need to set them.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.

2. Find and open the user with the profile preferences that you want to change.
3. Go to *Preferences*.
4. In *Active Locale ID*, select the locale for the user's learning preferences.

   You typically enable a set of locales and set their default attributes during implementation. If you don't see a locale, you can enable it.

   When you select a locale, the attribute for *Currency ID* populates in the page.
5. Select a time zone in *Time Zone ID*.
6. To show the start and end times for classes in the users' time zones regardless of the time zone where the course is held, select *Always display Classes in this Time Zone*.

   > **Note**
   >
   > Course Home ignores this setting.
7. If necessary, change the default attributes.

   It's uncommon to make changes in the *Update the Locale Format Options* section, but you might need to change users' time zones or currency.

   For example, if you select a U.S. English locale, and it defaults to Eastern U.S. Time, you might need to change user's time zone for users on the west coast of the U.S.
8. Click *Apply Changes*.

19.3.5.1 Always display Classes in Learner Time Zone

For older versions of SAP SuccessFactors Learning, you can set learners to always see courses in their own time zones. For later versions, we ignore the setting.

In SAP SuccessFactors Learning Administration, you can go to *Preferences* for any learner and select *Always display Classes in this Time Zone*. When you select it, you cause this learner to see course start and end times always in their own time zone.

Legacy Course Pages Use the Setting

As a customer, you still have the option to use the course pages as they existed before Course Home. The legacy course pages use *Always display Classes in this Time Zone*. When selected for learners, the learners go to courses and see the course start and end times in their own time zones instead of the time zones where the courses are held.

For example, if you select *Always display Classes in this Time Zone* for a learner in New York and the learner looks at a course in Heidelberg, Germany, the learner sees the start time in Eastern U.S. Time not in Central European Time. If the course starts at Noon in Heidelberg, the learner in New York sees it starting at 6:00 AM (six hours behind).

Course Home Ignores the Setting

In 2018, we released Course Home, which is the next generation of learner experience with courses. Course Home ignores the *Always display Classes in this Time Zone* setting to simplify your configuration. In Course Home, SAP SuccessFactors Learning displays the time in local time, not based on the static setting in the preferences.

19.3.5.2 Course Home Uses Local Time

In Course Home, SAP SuccessFactors Learning displays start and end times for courses in local time.

SAP SuccessFactors Learning uses time zones to show course start and end times in local time: the time **in the location** of learners when attending training. To calculate local time, Learning needs time zones for all applicable parts of the schedule and the user. To help you schedule, you should set the time zones too. For example, you set time zones for the facility where the course takes place, the time zone of the class, and the time zone of the user.

Local Time for Standard Courses

Standard courses are courses that learners physically attend. They are scheduled for a classroom at a physical address where users meet the instructor face-to-face and interact with other learners in the classroom (or lab, or other physical location).

If learners find a standard course and they want to enroll, they travel to the course location. To plan their trip, they want to know the course times in local time so we show the course times in the time zone of the facility where the course takes place.

For example, if a learner in New York is traveling for business to Heidelberg, Germany, the learner might want to attend training in Heidelberg. We show the course times in local time. In the case of Heidelberg, Central European Time. If the course starts at Noon in Central European Time, the New York user sees it starting at Noon. We don't, for example, convert the start time to Eastern North American Time just because the learner happens to search for it while in New York.

> → Tip
>
> In Course Home, you can think of course start and end times as train schedules or other schedules where the user is physically present for the timetable. A train departing at Noon in Heidelberg would show Noon regardless of where the user is because the user is physically present in Heidelberg to catch the train.

How Course Home Handles Course Times for Virtual Courses

Virtual courses are conducted with our Virtual Learning System (VLS). Users attend training as if it is a webinar: they dial in from their desks regardless of where their location. They meet with the instructor and fellow learners in a virtual meeting room, speak over the telephone, and chat using a messaging service.

If learners find a virtual course and they want to enroll, they do **not** travel to attend the course. Instead, they want to know when the course starts and ends in their own time zone.

For example, if you hold a virtual training for North America and the class is scheduled at Noon in New York, users in Vancouver would see the start time three hours earlier, at 9:00 AM. We do the conversion for VLS because the learner is attending the course from the location of Vancouver (in this case).

> → Tip
>
> In Course Home, you can think of VLS start and end times as virtual meetings or other schedules where the user is **not** physically present. If you are in New York and you send a calendar invite to a colleague in Vancouver, the colleague in Vancouver sees the meeting start time in his or her own time zone.

Do Not Add Locations to Virtual Course Segments

In normal usage, locations are physical spaces where participants and instructors meet. They have a time zone. When you assign virtual segments to physical locations, the virtual course reads the time zone from the location. As a result, virtual courses are no longer shown in the learners' time zones.

The location is assigned at the segment level, so you can create some physical segments and some virtual segments. For example, you can create a virtual segment on Monday and a physical segment on Tuesday. You can add the location to Tuesday's segment but not to Monday's segment.

19.3.5.3 Learning User Preferences Sync

The Learning solution, when integrated with SAP SuccessFactors HCM suite can synch user preferences. This topic describes the sync feature.

Users' locale, time zone, and currency import from SAP SuccessFactors Platform in real time. The import occurs for single records only because the import works on the SAP SuccessFactors event bus. When a setting changes in Platform, the system recognizes the change and immediately posts it to the event bus. Learning listens for the changes and then updates its own system to match. Bulk updates can be handled by the connector.

The users' preferences synchronize one way: when you change them in Platform, they update in the Learning. The one-way import means that you should treat Platform as the system of record.

Users' time zones are transformed because Learning requires locale-based time zones whereas Platform time zones can be codes like EST. The time zones are mapped as follows:

Time Zone Transformation Map

BizX time zone	LMS time zone
EST	America/New_York
CST	America/Chicago
MST	America/Denver
PST	America/Los_Angeles
AST	America/Anchorage

You can also sync user photos, but the process works outside the event bus.

SAP SuccessFactors Learning uses time zones to show course start and end times in local time: the time **in the location** of learners when attending training. To calculate local time, Learning needs time zones for all applicable parts of the schedule and the user. To help you schedule, you should set the time zones too. For example, you set time zones for the facility where the course takes place, the time zone of the class, and the time zone of the user.

19.4 Basic Management of Learner Profiles

You can manage your views of user profiles to set up your workspace.

As a learning administrator, you often need to return to some learner profiles and keep track of them. There are also some actions with learner profiles that you should not take.

19.4.1 Why You Should Not Reset Passwords in Learning

Do not reset user passwords in Learning because it is an artifact of Plateau products and does not work correctly in SAP SuccessFactors.

> ⚠ Caution
>
> Manage user accounts in SAP SuccessFactors Platform and use Platform for access and identity management.

19.4.2 Why You Should Not Copy Users in Learning

Do not use the copy learners (users) functionality because it is an artifact of Plateau products and does not work correctly in SAP SuccessFactors.

> ⚠ Caution
>
> Manage user accounts in SAP SuccessFactors Platform. Run User Connector - SF to draw the user information into Learning following your mapping and business rules.

19.4.3 Manually Deleting Native Users

Delete users to remove them from the transactional tables and so that they can be purged from your system for data privacy.

Context

> ⚠ Caution
>
> Don't manually delete users if you're integrated with SAP SuccessFactors platform. Instead, delete users in SAP SuccessFactors platform and allow the platform to delete the user in SAP SuccessFactors Learning.

Delete users to follow your data privacy policy. In most cases, if you have native-only users (you aren't integrated with SAP SuccessFactors platform), you set up the delete inactive users process to automatically delete users who have been inactive for a set period of time. In some cases, however, you might want to make an exception and delete native users immediately. When you want to delete native users immediately, you can manually delete them.

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.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*
2. Find and open the native user that you want to delete.
3. In *Actions*, click *Delete*.

19.4.4 Hiding User Images in SAP SuccessFactors Learning

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

Context

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

Procedure

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

19.4.5 Launching a Proxy Session to Troubleshoot Users

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

Context

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

- To access the *Launch Proxy* link, you must have access to the administrator proxy permissions in your security role. Without these permissions, you can't launch the session.
- If your administrator session expires, your proxy session expires also. We recommend, however, that you click *Close Session* to close the user session after you're done troubleshooting.
- No administrator, regardless of permissions, can change the state of the user's assignment or completion. You can't, for example, launch content to complete it. If you want to complete a learning item for a user, use the learning event recorder tool.
- If you make other changes while in the proxy session, users see the changes as if they made them. For example, if you change the user's language settings, it looks to the user as if they made the change. In the history tables of the database, however, the system creates an audit trail of these changes using **your** ID. This allows a full reporting of who, exactly, made the changes.

Procedure

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

complaining that their language is incorrect or that a problem has occurred and you suspect it to be related to the language.

> **Note**
>
> If the admin's language is the same of user's language, the language selection won't be displayed to the administrator.

5. Troubleshoot the issues that the user reported.

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

Related Information

Checking Users' Library Access [page 614]
Launching a Proxy Session to Troubleshoot Users [page 635]

19.4.6 Managing Alternate Managers in SAP SuccessFactors Learning Administration

Manage alternate managers in SAP SuccessFactors Learning when you want to override the alternate manager as it is assigned in SAP SuccessFactors platform or by a connector.

Context

In most cases, you change the alternate manager in the user connector that feeds users to SAP SuccessFactors Learning or you allow **managers** to remove the alternate manager.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *People* > *Users*.
2. Find and open the user that you want to manage and then click *Assign Alternate Managers* in *Actions*.

Related Information

Alternate Managers in SAP SuccessFactors Learning [page 627]
Allowing Managers to Remove Alternate Managers [page 887]

19.4.7 Learning Organization Dashboards

Instead of Learning organizational dashboards, please use other SAP SuccessFactors tools like Report Center.

A dashboard is composed of dashboard charts, which are graphical reports and organizations, which are a user population that the dashboard reports on. Together, they show how the employees of an organization are performing in a particular learning area. For example, *Item Completions* shows the user how the employees of an organization are performing by the measure of items completed.

To set up dashboards for a user, go to *Admin* > *Users* > *User* > *More* > *Organization Dashboard* and then select the dashboard charts and organizations that build this user's organization dashboard.

> → Tip
>
> You can include the suborganizations of an organization during or after you add a new organization.

19.5 Learning Organizations

The Learning organization in a user's learning profile isn't the same as their division or department, for example. It is their organization **for the purpose of assigning training**.

Learning organizations usually map to organizations that you track in the rest of SAP SuccessFactors, but not always. You use things like department and division for other reasons, but you useLearning organizations express how you divide your company for the purpose of assigning training. For example, even though users are a part of different departments or divisions, you can treat them as part of the same Learning organization because you assign the same courses to all of them based on how they're organized in your company.

For example, you have two departments in your organization to represent electronic auto parts and mechanical auto parts. But for the purposes of training assignment, you want to see them as the same **organization.**. Both departments can be part of the auto parts organization because they need courses about auto parts more generally.

19.5.1 Disabling a SAP SuccessFactors Learning Organization's Shopping Account

Enable or disable an organization's shopping account to allow or prevent purchases for that organization.

Context

When an organization has a shopping account, that shopping account enables purchases outside of chargeback. It enables an administrator (for example) to run the purchasing assistant to tie purchases back to the organization. Users who purchase with the organization shopping account are purchasing with organization money. You might want to disable purchasing from that organization shopping account.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *People* > *Organizations*.
2. Find and open the organization you want to manage.
3. Go to *Finance*.
4. Clear the *Enable Shopping Account* box.

Next Steps

You can enable the shopping account again by selecting *Enable Shopping Account*.

19.5.2 SAP SuccessFactors Learning Organization Summary

A summary of SAP SuccessFactors Learning organizations includes basic information about the organization.

To see the summary of SAP SuccessFactors Learning organizations, go to Learning administration and then go to *People* > *Organizations* > *Summary*.

Organization Summary Fields

This Field...	...Is Used as Follows
Organization Description	Because the content of this box appears in the user interface and in reports, we recommend that you enter a description that helps users identify the record or its purpose. If you leave the box blank, then the user interface shows the organization ID as the description of the organization.

This Field...	...Is Used as Follows
Organization Type ID	A unique ID of the organization type.
Email Address	We recommend that you enter the user's e-mail address so that he or she can receive important notifications. His or her e-mail address appears in any reports that include the user's contact information.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Branding Style	The branding style of the selected organization. Branding styles affect the welcome message for different roles and the way that the application appears to users and administrators.
Comments	We recommend that you 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 scheduled offering 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.

19.5.3 SAP SuccessFactors Learning Organization Account Code

When you give a SAP SuccessFactors Learning organization an account code, you identify the account that should be debited and credited during a chargeback transaction.

Organization account codes apply to you if you're using SAP SuccessFactors Learning commerce features and if you use chargeback. You usually set the account code during implementation and don't change it unless you're reorganizing your accounting system (this is rare). As a result, administrators usually look up organization account codes to troubleshoot a transaction rather than to configure the system.

In a chargeback system, the organization's authorized account code is debited or credited for each chargeback transaction. When an organization offers training, the organization's account code is credited. When a member of the organization receives training, the account code is debited. To enable the chargeback system for this organization, it must have an account code.

You can control whether individual users of the organization can debit the account code. To allow them to purchase training with organization account codes, select *User Can Use Org Accounts* for each user. The default location of that setting is *People* > *Users* > *Account Code*.

You manage organization account codes in *People* > *Organizations* > *Account Code*.

19.5.4 SAP SuccessFactors Learning Organization Finance Details

SAP SuccessFactors Learning organizations structure your Learning Management System (LMS) finance system into groups so that all users of an organization can share accounts.

If you are using the LMS commerce system to track costs and purchasing, then organization commerce details provide a structure to the finanace system. A SAP SuccessFactors Learning organization's finanance information ties the transactions in a library back to the organization. Organization finanance details have two parts: shopping account and billing/shipping information.

> **Note**
>
> To investigate or edit organization commerce details, go to *People* > *Organizations* > *Finance*.

SAP SuccessFactors Learning Organization Shopping Account

An organization's shopping account is auto-generated when you create the organization. The shopping account ties library transactions to the organization. For example, when an administrators uses the purchasing assistant to create a transaction for a learning item, the system tracks that transaction by the shopping account.

You can edit the shopping account information by going to *Commerce* > *Tools* > *Purchasing Assistant*. Look in *Edit Shopping Account*.

> **Note**
>
> An External shopping account type is ideal in a retail environment because an administrator can use a credit card to purchase any items.

SAP SuccessFactors Learning Organization Billing and Shipping

If an administrator uses the purchasing assistant and purchases a learning item that requires shipping, then the organization's shipping address is automatically inserted. A learning item requires shipping if its *Shipping Required* box is selected. This should be a central address, therefore, where you can receive materials like books or videos.

The billing information is the location where bills for the material can be sent.

19.5.5 SAP SuccessFactors Learning Organization Custom Fields

You often want to add custom data to an organization. When you do, you see the data in the organization's custom fields.

You often want to store company-specific data with your organization: data that we do not collect by default. For example, you might want to collect your organization size so that when you report on your organizations, you can

get a sense of how much money they are spending, but also see it in relationship to their size **as you have defined it**. In these cases, you can create custom fields.

You typically create custom fields during implementation and review them periodically. In most cases, administrators are not creating or removing the fields but instead viewing and populating the values of the fields per organization. You can see an organization's custom field values by opening the organization in *People* > *Organizations* and then going to *Custom Fields*.

19.5.6 SAP SuccessFactors Learning Organization Owners

An organization owner has access to SAP SuccessFactors Learning dashboards.

Dashboards show organization owners some analytics about their organization. For example, the learning completion rate or compliance with curricula. Dashboards are flexible, so each company shows different data, but their purpose is to inform the owner about the LMS usage at a glance.

You see an organization owners by going to *People* > *Organizations*, opening the organization, and then looking in *Owners*. To declare someone an organization owner, however, you go to *Users* > *Users*, open the users' records, and then go to *Organization Dashboard*.

19.5.7 SAP SuccessFactors Learning Organization Reserved Seats

A SAP SuccessFactors Learning organization reserved seat is a spot in a class: a spot that is reserved for a member of the organization.

An organization seat reservation is a space reserved for users of a particular organization. For example, if you create an Information Technology (IT) security course, you might want to reserve space for members of the IT organization. To do so, you create training seat reservations for IT organization members in the course. In a course with a registration limit of ten, for example, you might devote five spots to IT members.

You create reserved seats per class registration: you go to the class's *Registrations* area. But if you want to see all reserved seats that an organization has for all classes, go to *People* > *Organizations*, open the organization that you want to see, and then go to the *Seat Reservations* tab.

19.5.8 SAP SuccessFactors Learning Organizations Training Budgets

If you use training planner, then you have training budgets for your organization. Organization budgets are your outlay for the current planning period.

You can use *People* > *Organizations* > *Training Budgets* to view the budgets that have been set for the organization for each active training request period. In order to modify the budgets, you must use the data import tool (*System Administration* > *Tools* > *Import Data*) and select *Organization Budget* from the *Record Type* list.

19.5.9 SAP SuccessFactors Learning Organization Training Managers

If you use training planner, then you have organization training managers. Organization training managers can view summary training requests for the organization.

In *People* > *Organizations* > *Training Managers*, you can indicate to the users about their training managers for the organization. Training managers can view summary information about all the training requests associated to the organization and its suborganizations.

19.5.10 SAP SuccessFactors Learning Organization Users

SAP SuccessFactors Learning organization users are all users who belong to an organization.

You can use *People* > *Organizations* > *Users* to view users who are associated with the organization. You can't modify the association between an organization and its users from *Users*. To modify that association, you must change the value in the *Organization* field in *Summary* of the user record (*People* > *Users* > *Summary*). You can send an ad hoc notification to any or all users in the organization by selecting the user and then clicking *Send Email Notification*.

19.6 User Groups

When you want to reserve space in training for specific users and you want them to share finance attributes, you can use user groups.

User groups reserve seats for specific user roles, not for organizations in general. If you want to make sure that a specific user can attend a course, you need to know what role that user has, then you can assign their role to a user group. Only then can the user register for a reserved seat.

When you add seats for a group, you don't guarantee the users to have a seat in training. Instead, you give them preferential treatment. For example, if you have a training with 10 seats, three users in a group, and you reserve two seats for the group, then the first two users in the group to sign up for the offering get the seats. The third user can still enroll, but he or she competes with all other users in the system for the last eight seats.

User groups can also be used when you set up custom tiles on a landing page. When you create a custom tile, you have the option to decide which groups the tile is visible to. You can add custom tiles to a landing page if you have information to share with SAP SuccessFactors Learning users that doesn't exist in the system tiles.

Related Information

Creating an Assignment Profile [page 377]
Placing Users into User Groups [page 643]

Reserving Seats in a Class for Specific Users [page 223]
User Groups Finance [page 644]
Adding Custom Tiles [page 875]
Looking up a Learner's User Group Membership [page 628]

19.6.1 Placing Users into User Groups

Use an assignment profile if you're using groups to reserve seats for users.

Prerequisites

Creating an Assignment Profile [page 377]

Context

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

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *People* > *User Groups*.
2. Choose *Add New* to create a new user group.

   You create a user group as a container for users. The users that you put into the user group have preferential reservation status to the seats that you reserve for the user group.
3. Add a User Group ID and choose *Save*.
4. Add any information you need for the new user group, including shared account information. Choose *Save* when you're done.
5. Navigate to *Manage User Learning* > *Assignment Profiles* and search for the assignment profile you want to associate with the user group.
6. Go to the *User Groups* tab, then search for and select the user group that you want to assign to the assignment profile.
7. Choose *Save*.

Next Steps

Reserving Seats in a Class for Specific Users [page 223]

Related Information

Setting Up Assignment Profile Rules [page 380]

19.6.2 User Groups Finance

User groups have finance attributes so that you can tie seat reservation transactions back to the group.

When you create a group, you can add shopping account information and billing/shipping addresses to the group. When you do, any transactions for the group can be traced back to the shopping account.

If you complete the shipping information, then the shipping information is automatically inserted when an administrator purchases something that requires shipping.

19.7 Cohorts

You can group learners who are taught together and graduate from their learning experiences together.

You can group learners that go through the same set of classes. Cohorts are generally used as a grouping tool for users that you want to undergo a common set of classes. When you use a cohort, group reporting and group scheduling are easier. For example, if your company hired a group of trainees at the same time that needed to attend the same classes, you could create a cohort to schedule them as a whole and report on their achievements.

> **Note**
>
> In the past, we used the word "classes" to mean a group of users who graduated together. This caused confusion, however, because in English, "classes" can mean both "users who graduate together" and also "a gathering of people for training."

19.7.1 Cohorts Summary Fields

Cohorts summary fields contain basic information about a group who graduate from a learning experience together.

> **Note**
>
> An Assignment Profile rule with an operator of “Matches” or “Does Not Match” can’t accept a value that includes double quotes (").

This Field...	...Is Used as Follows
Description	The description is a one sentence description to help other users understand the cohort. The description appears on reports and to other users looking up the cohort. For example, you can call a cohort "Sales Trainees" or "Summer Internship Boot Camp."
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Curriculum	It’s common to include a curriculum with a cohort because you want the cohort to progress through the curriculum together.
Max Size	If you want to limit the cohort to a particular size, set *Max Size* to that limit.
Start Date End Date	The start date and end date are the start and end of the cohort. For example, if you create an internship cohort that joins your organization in May and departs in August, you can start the cohort at the beginning of May and end at the beginning of August.

19.7.2 Cohorts Custom Fields

You can add custom fields to graduation groups (graduating classes).

You can use *Learning* > *Classes* > *Custom Fields* to assign a value for any custom columns (*System Administration* > *Custom Fields*) that were added for a record type. If the custom column accepts only referenced values, then you can select one of those values from the associated list; otherwise, you can enter any value up to 40 alphanumeric or special characters in the associated box.

> **Note**
>
> In the past, we used the word "classes" to mean a group of users who graduated together. This caused confusion, however, because in English, "classes" can mean both "users who graduate together" and also "a gathering of people for training."

19.7.3 Class Groups Offerings

You can add classes to a class group.

In *Learning Activities* > *Class Groups*, you can add, view, or remove classes associated with a class group. Users in the class group are assigned the classes.

It's more common to associate a curriculum with a class group, but you can have good reasons to add offerings. You can add classes to supplement the curriculum, or you can avoid the additional work of setting up a curriculum and assign classes instead.

> **Note**
>
> You can also add classes to the class group through *Learning Activities* > *Curricula* > *Actions* > *Create Curriculum Classes*.

19.7.4 Cohorts (Graduating Class) Register Rules

You can configure the registration, withdrawal, and notification settings for the classes in a graduation group.

In *People* > *Cohorts* > *Register Rules*, you can configure the registration, withdrawal, and notification settings for the classes in the graduation group.

> **Note**
>
> In the past, we used the word "classes" to mean a group of users who graduated together. This caused confusion, however, because in English, "classes" can mean both "users who graduate together" and also "a gathering of people for training."

19.7.5 Cohort (Graduation Group) Users

You can add, remove, or update the existing users who are associated with a cohort (graduation group).

In *People* > *Cohorts* > *Users*, you can add, remove, or update the existing users who are associated with a cohort (graduation group). You can also create and add a new user to the cohort, change a user's cohort status, move a user to another cohort, and enter comments about a user's progress.

> **Note**
>
> In the past, we used the word "classes" to mean a group of users who graduated together. This caused confusion, however, because in English, "classes" can mean both "users who graduate together" and also "a gathering of people for training."

19.7.5.1 Adding Learners to the Graduation Group (Graduating Classes)

Create and add a learners to the graduation group to fill the available seats.

Context

> **Note**
>
> In the past, we used the word "classes" to mean a group of users who graduated together. This caused confusion, however, because in English, "classes" can mean both "users who graduate together" and also "a gathering of people for training."

Procedure

1. Click *Create and Add New User*.
2. Complete the Add New User Information form and click *Add*.

   The system automatically registers the user into each class in *Learning Activities* > *Classes* > *Offerings tab*, and adds the classes to the learner assignments lists.

19.7.5.2 Cohort (Graduating Class) Status of Learners

View this section if you want to know about changing a user's cohort status.

From the *Cohort Status* list, you can select or change the status (for example, Pass, Fail, or Drop) to keep a current record of learner progress in graduating. Each user's status is intended for administrators only.

> **Note**
>
> When you create a new cohrot status (*References* > *People Management* > *Cohort Statuses*), type a descriptive status ID so that administrators can easily identify the status.

> **Note**
>
> In the past, we used the word "classes" to mean a group of users who graduated together. This caused confusion, however, because in English, "classes" can mean both "users who graduate together" and also "a gathering of people for training."

19.7.5.3 User Actions in Cohorts

View this section if you want to know about moving a user to another graduation group.

When you click the *Move to Another Cohort* link, you can transfer a user to a different graduation group (for example, if the current group is full).

> **Note**
>
> In the past, we used the word "classes" to mean a group of users who graduated together. This caused confusion, however, because in English, "classes" can mean both "users who graduate together" and also "a gathering of people for training."

Remove old cohort curriculum

If you select the *Remove old cohort curriculum* check box, then the system unassigns and removes the previous graduation group curriculum from the user's to-do list when you click *Move* to transfer the user to another graduation group.

> **Note**

If you move a user to another graduation group that is associated with a curriculum, then the system automatically assigns the new curriculum to the user's to-do list.

Use only Classes with auto-register enabled

If you select this option and then click *Move*, then the system automatically enrolls users into only the class and registers the user (*Learning Activities* > *Classes*) for which you selected the *Auto-Register* check box.

Use all classes

If you select this option and then click *Move*, then the system automatically enrolls users into all classes (*Learning Activities* > *Classes*).

Withdraw from...

If you select any of the *Withdraw from...* check boxes, the system withdraws the user from all future, in-progress, or completed classes with no learning history when you click *Move* to transfer the user to another graduation group.

> **Note**
>
> The system doesn't remove items from a user's completed work if you move the user to another graduation group **after** he or she completes one or many classes in his or her previous graduation group.

19.7.5.4 Cohorts (Graduating Class) Progress

View this section if you want to know how to enter comments about a user's cohort progress.

When you click the *Comments* link, you can enter comments about a user's progress in the graduation group that you or other administrators can refer to. You can access these comments only from the Users tab of the class record on which it was entered.

> **Note**

All comments are intended for administrators only and cannot be viewed in the user interface.

> **Note**
>
> In the past, we used the word "classes" to mean a group of users who graduated together. This caused confusion, however, because in English, "classes" can mean both "users who graduate together" and also "a gathering of people for training."

19.7.5.5 Removing Learners from Cohorts (Graduation Groups)

View this section if you want to know about removing a user from the cohort.

When you select the *Remove* checkbox to remove a user from the cohort and then choose *Apply Changes*, the system withdraws the user from any classes for which they're registered. If you associated the cohort with a curriculum, then before the system removes the users you selected, it allows you to choose if you want to unassign the associated curriculum from each user's to-do list. If you select *Yes*, then the system removes the users from the cohort **and** unassigns the associated curriculum from each user's to-do list. If you select *No*, then the system removes the users from the cohort but **doesn't** unassign the curriculum from each user's to-do list.

> **Note**
>
> If you remove a user from the cohort who is a member of an organization that filled a reserved seat in a class, then the system opens that seat for a different user in the cohort who is within the same organization.

19.8 Assigning Learners to New Managers with the Learning Manager Assistant

Most customers should use standard SAP SuccessFactors Platform tools to change manager relationships to direct reports. A few customers can use the legacy manager assistant.

Prerequisites

You need to have the *Edit User Manager* permission to perform these steps.

Context

When you implement Learning, you create a set of field mappings and rules to control how Platform employee data applies to learner profiles. Most customers invest in the mapping and rules to maintain Platform as the system of record. As a best practice, therefore, you should edit employee relationships in Platform and allow your implemented rules to bring the data into Learning. The manager assistant edits the data in Learning.

Procedure

1. Go to Learning Administration, and then go to *People* > *Change Assigned Manager*.
2. In *Select Current Assigned Manager* > *Manager ID*, select the **current** manager whose direct reports you want to assign to a new manager, and then click *Next*.
3. In *Select New Assigned Manager* > *Manager ID*, select the **new** manager who you want to assign direct reports to, and then click *Next*.
4. In *Add Users*, click *add one or more from list* to find the users who you want to assign to the new manager from the current manager.

   Learning shows the users who are associated with the current manager you identified in *Select Current Assigned Manager*, but you can click *add one or more from list* to add any user in the system to the affected users, even if that user doesn't report to the current manager.
5. Click *Next*.
6. Review the reassignment and then click *Finish*.

19.9 Merging Users Manually

You can merge learning records from the secondary user ID to the primary user ID for each user manually.

Context

If you want to bulk merge learning records for multiple users simultaneously, refer to **Merging Users in Bulk Through Import** in the **Related Infirmation** section.

Procedure

1. Go to *Learning Administration* > *People* > *Merge Users*.
2. In the *Search* page, enter values for each field that you want to use to filter your search.

   > ⓘ Note
   >
   > If you don't see the relevant fields, choose *Add/Remove Criteria* and then choose the fields to filter your search.

   The search results appears.
3. From the list, choose *Merge from User ID* for the user whose details you want to merge.
4. Choose *Merge Into User ID* for the user into whose details you want to merge.
5. Choose *Merge* > *OK*.
6. Repeat the procedure if you want to merge records for another user.

Results

The chosen users' records are merged into one record in the Learning Management System. Once the records are merged, the user chosen to be merged from is automatically deactivated in the system.

> ⓘ Note
>
> When records conflict during the mereg process, the primary record (Merge Into User ID) often remains intact. When the primary record has no data, the secondary record (Merge From User ID) populates the primary record. In a Learning Plan, for example, if the primary user has items IT-101 and IT-102 and the secondary user has items IT-101, IT-102, and IT-103, the data related to IT-103 is added to the user's primary record.

Related Information

Merging Users in Bulk Through Import [page 652]

19.10 Merging Users in Bulk Through Import

You can bulk merge learning records from the secondary user ID to the primary user ID for multiple users simultaneously through import.

Prerequisites

You've downloaded the template and prepared your data for import.

Context

> → Tip
>
> The secondary user ID (Merge From) is the source from which the data is merged, and the primary user ID (Merge Into) is the target into which the data is merged.

Merging user records in bulk automatically transfers all learning assignments, learning history, and other learning events from the secondary to the primary user ID for all users at once.

> ⓘ Note
>
> Merging data is permanent and can't be reversed once completed. Therefore, we recommend you validate the records before initiating the merge job. The validation process examines the data for invalid entries, duplicate entries, and other potential issues found in the import file. For more information, refer to **Validating User Records in Bulk** in the **Related Information** section.

Procedure

1. Go to *Learning Administration* > *System Administration* > *System Management Tools* > *Import Data*.
2. From the *Entity Type* list, choose *Person*.
3. To import the file, in *Action*, choose *Import Data*.

   The *Merge* option is automatically selected in *Import Option*.
4. **Optional:** If you want to exclude users' learning history from the merge, in *Merge Criteria*, choose *Exclude learning history*.

> **Note**
>
> If you've selected the option, ensure that you manually copy the users' course completions from the secondary user ID to the primary user ID before you initiate the merge job. This activity is necessary to prevent potential changes that may occur to course statuses after the merge. You can choose to copy the completions using connectors, APIs, or any other methods that suit your preferences.

> **Restriction**
>
> It is important to note that when you enable the option, compliance details aren't copied to the primary user ID, and there's no means to recover it.

5. In *Import File*, choose the file you want to upload, and select your time zone.
6. Choose *Submit*.

   The *Schedule Background Job* page opens.
7. You can choose whether to run the job immediately, or to schedule to run the job at a later, determined date.
8. In the *Job Description* field, enter a job description.

   A default job description is generated if the field is left blank.
9. If you choose to be notified through email on job completion, choose *Notify via email upon completion*, and specify the email address.
10. Choose *Finish*.
11. Verify the job status information, and choose *Continue Importing Data*.

Results

In the *Import Results* table, you can view the import ID, date and time, job description, and job status of the uploaded file. You can also check the error log, delete, or download the report of the job.

> **Note**
>
> Following the job completion, records are merged to primary user ID, and the secondary user ID is automatically deactivated in the system.

Next Steps

From the *Import Results* table, to view the merge results, download the user merge report of the job in the *Report*. The report includes:

- Job summary
- Records failed due to unresolved warnings
- Records failed due to errors
- Merged records with details

Related Information

Downloading the Import Template for Validating and Merging Users [page 655]
Validating User Records in Bulk [page 656]

19.10.1 Considerations Before Bulk Merging Users Through Import

When you bulk merge users on the *Import Data* page, use some common strategies to help you import the data according to your business processes and needs.

Before you initiate the merge job, consider the following:

- Ensure that the *Assignment Profile Execute Updates* and *User Connector* automated processes aren't running. If these processes are in progress while you submit a merge job, the import job can't be executed as expected. This results in the merge job remaining in the *Scheduled* status.
- To prevent merging the same users inadvertently, verify the user IDs in the import file for every import. Repeated attempts to merge users can exceed the import limit allowed for a 30-day period. If you exceed the 5000 limit at the time of your import, the job doesn't proceed, and you have to wait until after the 30-day limit to resume your merging activities.

  > **Note**
  >
  > The threshold limit, which is applicable for 30 days, remains consistent when you merge users in bulk on the *Import Data* page and merge users through APIs. This threshold limit helps regulate the volume of merging activities over a defined period. If you want to increase your threshold limit, contact Technical Support.

- Ensure that you maintain the user status between Learning and Platform users to avoid data discrepancies during the merge process.
- If a single record in the import file fails during the merge process, the job status appears as *Failed* for that specific job. However, it's important to note that the overall import process is considered successful, despite the failure indication. You can download the associated report to view the records that are processed, both successfully and failed.
- If you intend to merge records consecutively for a user, validate that the primary merge is completed before you initiate any subsequent merges for the same user. In cases where there are multiple instances of the same user in an import file, only the primary occurrence is processed for merge, while all subsequent instances are rejected from the merge process. Following a sequential approach minimizes data inconsistencies and ensures that each merge progresses from the previously merged data for the user.
- Your import file can include up to a maximum limit of 500 rows for each import.
- You can merge users regardless of user status, whether the source, target, or both users are inactive.
- Government reporting data and learning completion records are merged into the target user only if the *Include in government reporting* option is enabled for the source user and disabled for the target user.

  > **Note**
  >
  > If the option is enabled for the target user, the data isn't merged, and all records remain unchanged.

19.11 Downloading the Import Template for Validating and Merging Users

Download an import template to create multiple user records for bulk validation of entries between the primary and secondary user IDs, and to merge records from the secondary to the primary user ID for multiple users in a single job.

Context

> **Note**
>
> Your import file can include upto a maximum limit of 200 rows for each import.

Procedure

1. Go to *Learning Administration* > *System Administration* > *System Management Tools* > *Import Data*.
2. To download a blank CSV import template, in *Action*, choose *Download Template*.
3. From the *Enity Type* list, choose *Person*.
4. Choose *Submit*.

   The import template is downloaded as a Microsoft Excel file with the default file name **EntityTemplate_Person** to your browser. The template includes three columns namely **Merge From**, **Merge To**, and **Ready to Merge**.

   > **Note**
   >
   > When you're validating user records, add your data in the first two columns, **Merge From** and **Merge To**. The **Ready to Merge** column is optional during the validation process, however, it's recommended to fill out the column when merging users in bulk. Leaving the column empty results in generating the warnings again in the merge report.

Next Steps

- If you want to validate user records in bulk, add the following entries in the template and import the file:
  - In **Merge From**, enter the user ID of the person whose information you want to merge.
  - In **Merge To**, enter the user ID of the person you want to merge information into.
  - The **Ready to Merge** column can be left blank.

  For information about validating user records, refer to **Validating User Records in Bulk** in the **Related Information** section.
- If you want to merge users in bulk, add the following entries in the template and import the file:

- In **Merge From**, enter the user ID of the person whose information you want to merge.
- In **Merge To**, enter the user ID of the person you want to merge information into.
- In **Ready to Merge**, enter **Y** in the records to indicate that the suggested fixes provided in the validation report have been resolved for warnings, signifying readiness to merge.

For information about merging users, refer to **Merging Users in Bulk Through Import** in the **Related Information** section.

Related Information

Merging Users in Bulk Through Import [page 652]
Validating User Records in Bulk [page 656]

19.12 Validating User Records in Bulk

Before you merge users in bulk, you can validate the user records between the primary and secondary user IDs for multiple users simultaneously through import.

Prerequisites

You've downloaded the template and prepared your data for import.

Context

The validation process examines the data for invalid entries, duplicate entries, and other potential issues found in the import file before merging users.

Procedure

1. Go to *Learning Administration* > *System Administration* > *System Management Tools* > *Import Data*.
2. From the *Entity Type* list, choose *Person*.
3. To import the file, in *Action*, choose *Import Data*.

   The *Merge* option is automatically selected in *Import Option*.
4. **Optional:** If you want to exclude users' learning history during the validation, in *Merge Criteria*, choose *Exclude learning history*.

> **Note**
>
> If you've selected the option, ensure that you manually copy the users' course completions from the secondary user ID to the primary user ID before you initiate the merge job. This activity is necessary to prevent potential changes that may occur to course statuses after the merge. You can choose to copy the completions using connectors, APIs, or any other methods that suit your preferences.

> **Restriction**
>
> It is important to note that when you enable the option, compliance details aren't copied to the primary user ID, and there's no means to recover it.

5. In *Import File*, choose the file you want to upload, and select your time zone.
6. Choose *Validate*.

   The *Schedule Background Job* page opens.
7. You can choose wheher to run the job immediately, or to schedule to run the job at a later, determined date.
8. In the *Job Description* field, enter a job description.

   A default job description is generated if the field is left blank.
9. If you choose to be notified through email on job completion, choose *Notify via email upon completion*, and specify the email address.
10. Choose *Finish*.
11. Verify the job status information, and choose *Continue Importing Data*.

Results

In the *Import Results* table, you can view the import ID, date and time, job description, and job status of the uploaded file. You can also check the error log, delete the report, or download the report of the job.

Next Steps

1. From the *Import Results* table, download the validation report of the job in the *Report* column. The report includes:
   - Job summary
   - Records included for merge with warnings
   - Records excluded for merge due to validation errors
   - Records that are ready for merge
2. Use the report to address any data issues, and then update the **Ready to Merge** column to **Y** for the records that have been corrected for warnings.
3. Merge users in bulk. For more information, refer to **Merging Users in Bulk Through Import** in the **Related Information** section.

Related Information

Downloading the Import Template for Validating and Merging Users [page 655]
Merging Users in Bulk Through Import [page 652]

19.13 Rules Applied When Merging Users in Bulk and Manually

View this section if you want to know about the rules that apply to merging users in bulk on the *Import Data* page and merging users manually on the *Merge Users* page.

Here is a list of the rules that govern the merging user records. The list includes a tab-by-tab description about the data that is merged into the primary user record.

Tabs	Merge Rules
Summary, Custom Fields, Commerce, and Account Code tabs	IF the fields in the Merge Into User ID records do NOT contain values, THEN those fields, if existing, are updated from the Merge From User ID records.
Phone Numbers tab	IF there are no matching records in the Merge Into User ID records THEN the records from the Merge From User ID are added.
Competency Profiles tab	IF there are no matching records in the Merge Into User ID records THEN the records from the Merge From User ID are added.
Requests tab	IF there are no matching records in the Merge Into User ID records THEN the records from the Merge From User ID are added.
Library Access tab	No data is added or updated from the Merge From User ID record. The user's library access is re-evaluated based on the merged.
Approval Role tab	IF there are no matching roles in the Merge Into User ID records THEN the records from the Merge From User ID are added. IF there are matching roles in the Merge Into User ID records THEN non – matching control domains are added from the Merge From User ID records.
Preferences tab	IF the fields in the Merge Into User ID records do NOT contain values THEN those records, if existing, are updated from the Merge From User ID records.

Tabs	Merge Rules
Registration tab	IF there are no matching class records in the Merge Into User ID records THEN the records from the Merge From User ID are added.
Online Status tab	IF there are no matching items in the Merge Into User ID records THEN the records from the Merge From User ID are added.
Learning Plan tab	IF there are no matching items in the Merge Into User ID records THEN the records from the Merge From User ID are added.
Curricula tab	IF there are no matching records in the Merge Into User ID records THEN the records from the Merge From User ID are added. IF both Merge From User ID and Merge Into User ID have same curricula assignments with different dates THEN the latest assignment date for the curricula is applied to the Merge Into User ID record. **Note** During the merge, the system recalculates the due dates based on the assignment date and the curriculum requirement. Manual due date changes **aren't** kept during the merge.
Competencies tab	IF there are no matching competencies in the Merge Into User ID records THEN the records from the Merge From User ID are added. IF there are matching competencies THEN the competencies with the most recent assessment date are kept; either the Merge Into User ID data is retained or the data from Merge From User ID is updated in the Merge Into User ID record.
Learning History tab (includes completed online items)	All learning history records are added from Merge From User ID to the Merge Into User ID.
Approvals tab	Pending approval records aren't merged from Merge From to the Merge Into user ID.

Related Information

Merging Users in Bulk Through Import [page 652]
Merging Users Manually [page 651]

20 Online Learning Content Management

Manage online content so that learners can see courses on demand with mobile devices, browsers, or in offline player.

Online content is any learning item offered on the computer—whether it is over the Internet or launched locally from a workstation. Often, online content is served from a content server and tracked in SAP SuccessFactors. Online content often fits a standard structure like AICC (Aviation Industry CBT Committee) or SCORM (Sharable Content Object Reference Model), but it does not need to be structured. Instead, think of online learning content as any online course material that you upload so that learners can view it on demand.

When you think about online content, it is useful to think about whether the course is on-demand or whether it is live. Online content management applies to on-demand courses. On-demand courses are materials that your learners view on their own schedules. They can use more than one viewing platform: mobile devices, browsers on standard workstations, or offline player.

Many courses that have a scheduled, live event: learners meet with an instructor in a room at a time and date. Even if the event happens online, in a virtual meeting room, it is still a live event. Learners must show up at a place (the virtual meeting room) and a time to meet with the instructor. For live events, you do not need to manage online learning content.

A few courses in your company might have some online content and some live meetings with instructors. Courses that blend on-demand and live segments are called **blended** courses. For blended courses, you manage the online content **and** you manage meeting spaces for the live portion.

> **Note**
>
> Content management can be difficult, especially for structured content from third parties because we cannot ensure the quality of the structure before you import it. Please talk to a SAP SuccessFactors representative about options like Preferred Content Management or contact a partner to help you manage the structured content.

20.1 Content Objects

You can create and maintain all key content object information through the SAP SuccessFactors Learning *Content Objects* tab.

In the SAP SuccessFactors Learning *Content* > *Content Objects* tab, you can create and maintain all content object information, including:

- content object's title and description
- identity and location of the associated content application
- content object's associated objectives
- AICC Support

> **Note**
>
> When you change the launch method for an existing content object from *Browser*, *SCORM*, or *Document Type* to *AICC*, or from *AICC* to *Browser* or *Document Type*, some settings applied at the item level (e.g. *Complete Content on Launch*, *Add to History on Pass*, or *Add to History on Failure*) must be unchecked and the related items must be reassigned to users before the change can be applied. This helps prevent course completion issues.

The record you create does not contain the content itself. It is a record that points to the content and describes it so that the system can track it and recognize its existence. The object itself is managed on a content server.

The *Cross Domain* tab allows you to share content objects across more than one domain. This enables users to take an exam that uses content objects which are assigned to two different domains.

> **Note**
>
> Cross Domain communication applies only to Browser and SCORM launch methods.

20.1.1 Creating Content That Users Can Confirm Reading

Use the internal AICC wrapper to set up content that users read and then agree or disagree to (or confirm that they have read). Users' decisions are recorded as a learning event.

Prerequisites

Before you set up content that users can agree or disagree to (and record their responses), configure the boilerplate text. You can set up the boilerplate text and translate it to different languages in *System Administration* > *Configuration* > *Global Applications Settings* > *AICC Wrapper Settings*.

Context

You often want to create content that users agree to or disagree to. For example, if you have a Standard Operating Procedure (SOP) and you need learners to agree or disagree to the SOP, you can wrap it in an internal AICC wrapper and record that users have at least agreed to reading it.

> **Note**
>
> This method describes using the internal AICC Wrapper file, which most customers use. If you manage your content externally, you can also use the external AICC Wrapper file.

Procedure

1. Add the document that users agree to on a URL that is accessible to your learners.
2. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Content Objects*.
3. Click *Add New* to add a new content object.
4. Complete the information in the *Summary* section.
5. In *Edit the Launch Method for the Content Object*, select *AICC*.
6. Select *Use AICC Wrapper*.
7. In *Filename*, paste the URL where the document is stored.

   For example, if you want users to confirm that they have read my_file.pdf on your intranet, the URL in *Filename* could be `HTTP://intranet.company.com/docs/my_file.pdf`.
8. Click *Apply Changes*.

20.1.1.1 Using the External AICC Wrapper to Create Confirmation Statements

Use the external AICC Wrapper to create confirmation statements if you manage your content on a separate content server and you want users to confirm that they have read documents (and you want to store their confirmation).

Prerequisites

Extract wrapper.html to your content server. You typically extract the file as part of your cross-domain solution when you first set it up. You need to know the location of wrapper.html as part of this process.

Context

You often want to create content that users agree to or disagree to. For example, if you have a Standard Operating Procedure (SOP) and you need learners to agree or disagree to the SOP, you can wrap it in an external AICC wrapper and record that users have at least agreed to reading it. Use the external AICC wrapper when you manage your content on a content server.

> **Note**
>
> - Don't select the *Use AICC Wrapper* checkbox when you're using an **external** AICC wrapper.
> - With an external AICC wrapper, the content is always launched in a new browser tab.

Procedure

1. Add the document that users agree to on a URL on your content server.
2. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Content Objects*.
3. Click *Add New* to add a new content object.
4. Complete the information in the *Summary* section.
5. In *Edit the Launch Method for the Content Object*, select *AICC*.
6. In *Filename*, type the relative URL to the wrapper.html file that you extracted as part of your cross-domain solution.

   For example, customers typically extract to `/content/wrapper/wrapper.html`.
7. In *Parameters*, type **`docURL=<URL to your document>`**

   For example, `docURL=https://content.server.com/docs/my_file.pdf`
8. Click *Apply Changes*.

20.1.1.2 Changing Internal AICC Wrapper Text Confirmation Text

Change the internal AICC wrapper text to change what users read when they are presented with a document and asked to confirm that they have read the document.

Context

You often want users to confirm that they have read a document. For example, you can show them a Standard Operating Procedure (SOP) as part of their training and ask that they confirm that they have read it. You can wrap the document in the AICC wrapper to record their response. By default, the text is: I confirm that I have read and understand all the material contained in this document in English. The confirmation buttons are Agree and Disagree in English. If you want to change the text, you can do it in the global variables.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration*.
2. In *AICC Wrapper Text*, type the new instructions to users in *Confirmation Text*, the new affirmation button text in *Agree Button Text*, and the new decline text in *Disagree Button Text*.
3. Translate the text by clicking the localize button ( ).

20.1.1.3 When and How to Use the AICC Document Wrapper

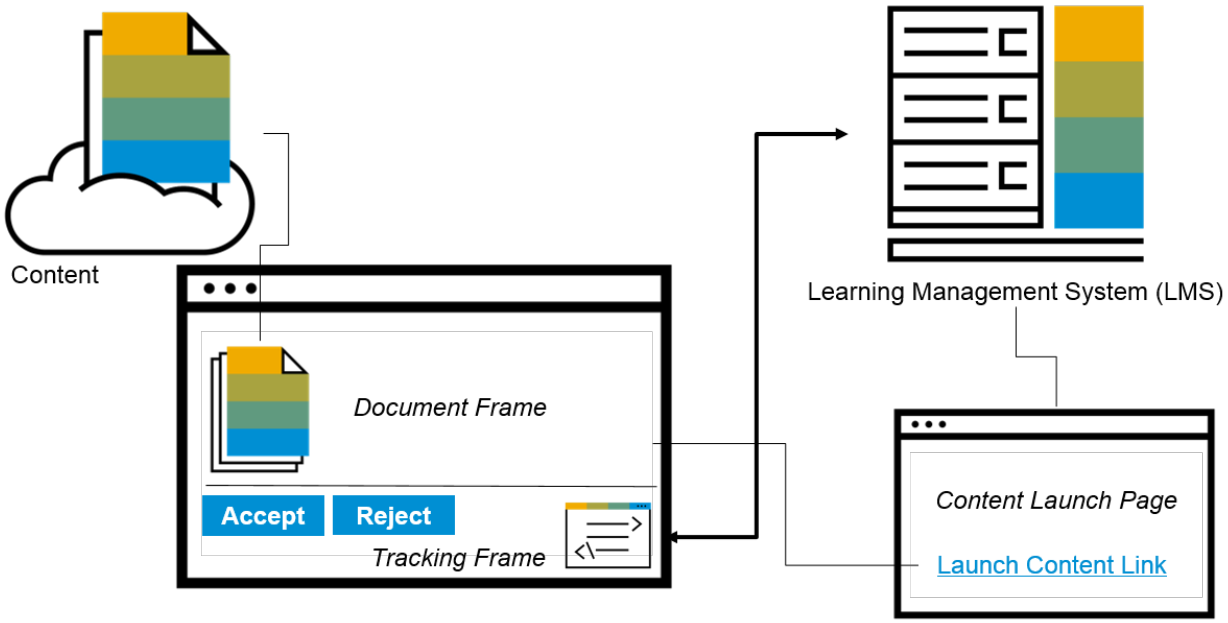
The AICC document wrapper wraps online documents or other browser-based content so that SAP SuccessFactors Learning can record both the completion of the content and the time that the learners spent in the content.

Use the AICC wrapper when content doesn't contain any mechanism for communicating back to SAP SuccessFactors Learning. Don't use it if the online content already has a mechanism to communicate status back. In other words, use it for documents like PDF files and not for active content like SCORM content.

When the content object launches with an AICC wrapper, the learners' browsers call for the appropriate document or object to be loaded into the wrapper frame. The tracking frame of the wrapper then communicates data to the LMS using HTTPS for completion. Objects to be loaded into the wrapper can live at any location the user can access in a browser.

There are two types of wrappers: internal and external:

- The internal version is simpler to set up and requires only that the document is available on a URL. You don't need a tracking content server. It supports only one confirmation text set per language we support.
- The external version is more complex to set up but is more useful for companies that deploy our cross-domain solution to create a tracking content server. As part of setting up the tracking content server, you extract wrapper.html. Content objects launch wrapper.html and pass the document as a parameter. Because you have full control over wrapper.html, you can clone it to create many wrappers, each with a different confirmation text and in any language.



Architecture of the AICC Wrapper

20.1.2 Copying a Content Object

You can copy a content object when you want to reuse information from an existing content object.

Context

Copying a content object is the most efficient way to create a new content object when you want to reuse information from an existing content object. When you copy a content object, you are creating a new instance but the new instance does not link to the existing object.

Procedure

1. Click *Copy Content Object*.
2. Enter a *New Object ID*. It is recommended that you enter a descriptive name so that administrators can easily identify the content object.
3. Click *Copy*.

   The system automatically copies the data from the *Summary*, *Launch Method*, *Objectives*, *AICC Support*, and *Cross Domain* tabs to the new content object.

20.1.3 SAP SuccessFactors LearningContent Object Summary Fields

A content object's summary fields contain metadata for the content object.

To access the summary fields for a content object, go to *Content* > *Content Objects* > *Summary* tab. This tab contains general information regarding the content object, such as the build user, build location, build company, build date, and a description of the object. This information is for your record-keeping purposes only, and isn't used elsewhere. The tab also contains controls that determine the object's activity status and online availability.

Required fields are marked on the screen with an asterisk (*).

This field...	Is used as follows...
Title	The name of the content object. Titles should describe the object to other administrators and users.

This field...	Is used as follows...
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator. For more information about how you can configure access to records, see Security.
Build User	The user who created the content object. The user name isn't validated. Because this is a free form text field, consider typing the user's email address along with his or her name.
Build Company	The company who created the content object. If you purchased the object from a third party, you can type the name of the company for your records.
Build Location	The location where the content was built.
Build Date	The date that the content was built.
Content Object is Active	This check box, when selected, indicates that the content object is accessible to administrators. It's available to be selected for inclusion in items and will be visible to them in any list of content objects in other parts of the program. If you clear the box, this content object becomes inaccessible to all except those users who have permission to view inactivated items.
Description	Text that provides a more detailed explanation of the content object and provides details not found in the other fields.
Content Object is Online	In most cases, you want content objects to be **online**, which means that users can open and see the content object. In some cases, you might discover a problem in the content object and you might want to disable the content object. When content objects are offline, we preserve the relationships of the content objects to courses and to content packages, but users cannot click a link or select to open the content object.
Developer Tool	The content developer tool is the tool that built the online content. We store the content developer tool so that if you need to update the course content later, you know which tool created it.

This field...	Is used as follows...
Mastery Score	The content object mastery score is the score required by the user to complete the selected **content object**. It is **not** the score they must reach to complete the course. • If the learners achieve the score for the content object, they are marked **completed**. • If the learners do **not** achieve the mastery score, they are marked **finished**.

20.1.4 Content Object Launch Methods

Content objects are launched through different methods, depending on their configuration. Understanding content object launch methods will aid you in determining the appropriate content player for a content object.

You can go to *Content* > *Content Objects* > *Launch Method* to launch the content object.

The following table shows how the various launch methods are used.

Programmatic Code	This Launch Method...	Is used as follows...
0	Content Player	
1	Document Type	The operating system determines the player for this content, based on the file types and associations that are registered with the operating system. The player is generally installed on a common internal server, though this technology is seldom used in modern courseware.
2	AICC	Establishes the proper connection between SAP SuccessFactors LearningThe player is generally installed on a common internal server, and the AICC courseware. All AICC content objects should be Web browser-based.
3	Browser	The system utilizes the user's browser to launch and run the selected content object inline.
4	SCORM 1.2	Establishes the proper connection between SAP SuccessFactors Learning and the SCORM-based, version 1.2 courseware.

Programmatic Code	This Launch Method...	Is used as follows...
5	SCORM 2004	Establishes the proper connection between SAP SuccessFactors Learning and the SCORM-based, version 2004, 2nd edition courseware. **Note** While SCORM 2004 3rd edition isn't a supported version, this setting can be used with SCORM-based, version 2004, 3rd edition courseware if the features match those available in the 2nd edition. Features unique to SCORM 2004 3rd edition, such as branching, won't work.
6	SCORM 2004 4th Edition	Establishes the proper connection between SAP SuccessFactors Learning and the SCORM-based, version 2004, 4th edition courseware.

20.1.5 Content Object Launch Method Fields in SAP SuccessFactors Learning

A content object's launch method defines how SAP SuccessFactors Learning should start the online content.

To specify the content player and command line parameters it needs to launch the content object, go to *Content* > *Content Objects* > *Launch Method*.

This field...	Is used as follows...
Content Player	Select this button if you want the player for this content to be selected based on your explicit choice of a player application file located in one specific place on your network. See also, Content Players.
Document Type	Select this button if you want the operating system to determine the player for this content, based upon the file types and associations that are registered with the operating system.

This field...	Is used as follows...
AICC	Select this button if this courseware is an AICC assumable unit. By doing so, you establish the proper connection between SAP SuccessFactors Learning and the AICC courseware. All AICC content objects should be web browser-based. This type of content will always launch in a new window.
Browser	Select this button to have the system use the user's browser to launch and run the selected content object. If the content object is opened in the same browser window, the URL must be secure using HTTPS. This type of content will always launch in a new window.
SCORM 1.2	Select this button if the courseware is SCORM-based and version 1.2. This establishes the proper connection between SAP SuccessFactors Learning and the SCORM courseware.
SCORM 2004	Select this button if the courseware is SCORM-based and version 2004, 2nd edition. This establishes the proper connection between SAP SuccessFactors Learning and the SCORM courseware. **Note** While SCORM 2004 3rd edition isn't a supported version, this setting can be used with SCORM-based, version 2004, 3rd edition courseware if the features match those available in the 2nd edition. Features unique to SCORM 2004 3rd edition, such as branching, won't work.
SCORM 2004 4th Edition	Select this button if the courseware is SCORM-based and version 2004, 4th edition. This establishes the proper connection between SAP SuccessFactors Learning and the SCORM courseware.

This field...	Is used as follows...
Launch in a New Browser Window	You can set course content to launch in a new browser window. (For the *Launch in a New Browser Window* option to be available, ensure that you've selected the *Display "Launch in a new Browser Window" option for content objects* option in *System Administration* > *Configuration* > *Global Applications Settings* .) **Note** Administrators can configure `overrideContentLaunchInNewWindow=true` in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN* to override the content-object level launch method for all content **except** browser-based and external content.
Content Player	The player you choose is always used for the particular content associated with this content object. This field is only used when the *Content Player*
Use AICC Wrapper	The most common reason to use the AICC wrapper is for tracking the completion of a document. For example, if your training consists of reading a Standard Operating Procedure (SOP), you can upload the SOP as AICC (Aviation Industry Computer based training Committee) standard wrapper to track whether users verified the SOP are read or did not. The process for setting up the AICC wrapper system is typically handled during initial implementation. **Restriction** AICC wrapper is **not** supported for offline player, but is supported for mobile devices.

This field...	Is used as follows...
Content URL	When using a Content Player, type the URL of the actual content. If your content player is set up properly, it knows which executable file to use to launch that content file. When using *Document Type* or an AICC course, type the URL of the file or AICC course in the *Filename* field. If any parameters need to be passed to the executable, you can enter them into the *Parameters* field. **Note** A content launch error will occur if any unsupported characters are used in the launch URL or any file that the content launches. Because the launch URL is created based on the imported content zip file, please ensure all files in the import zip file and any content package IDs contain only supported characters. For more information, see Characters Not Supported in Content File Names.
Offline Filename	The location of the content object in the content archive of a downloadable content object. For example, if the content object is in the archive at the <archive root>/resources/Lesson_1.htm, the value is resources/Lesson_1.htm. If the Offline Filename value doesn't match the actual location in the archive, Learning Offline can't launch the object. If you import a SCORM object, the value is pre-populated with the default SCORM value.
Parameters	Use this field to provide the necessary parameters that need to be passed when launching the course.

This field...	Is used as follows...
Folder Access Level	User this field to set specific access folder restrictions for iContent. The value provided in the field must start with a forward slash (/). For example, if you set a value of **`/self-managed/java101`**, the content will only launch if the file is within or below the **`java101`** folder. **Note** This field is controlled by the `enableiContentSpecificAccessFolderRestriction` setting (*System Administration* > *Configuration* > *System Configuration* > *WEB_SECURITY*). By default, this setting is `false` and the field is hidden. If `enableiContentSpecificAccessFolderRestriction=true`, administrators can use the `iContentGeneralAccessFolders` setting to define any files within iContent folders intended for general access. The value for this setting is empty by default. To define multiple folder paths, separate each complete folder path with a comma.
Enable Mobile Access	Select this checkbox to identify content that launches well in mobile devices, as well as in a browser. If you select Enable Mobile Access for a particular content and enabled the Mobile Readiness Indicator during implementation, then the content displays a mobile readiness indicator. **Note** Test your content on mobile devices before selecting this checkbox in production.

Related Information

SAP SuccessFactors Learning Course Home
Settings That Control Online Content in a Learning Item [page 47]

20.1.6 Content Objects AICC Support

If a content object is type *AICC*, you need to add metadata to the content object.

To add AICC support data, go to *Content* > *Content Objects* > *AICC Support*. The AICC support data can be automatically passed to the player program via the AICC data block if the player you've selected for this object is AICC-compliant.

For example, screen resolution and bookmark data are useful information to have passed onto the player in this way. Objects that use *Learning Offline* don't normally require entries in this field. Consult your player's documentation for information and syntax rules for your entries in the *AICC Support* field.

20.1.7 Learning Content Objects Cross Security Domain Fields

If you set up the Learning *Cross Security Domain Solution*, you must edit the cross security domain fields for each content object you serve cross security domain.

In *Content* > *Content Objects* > *Cross Security Domain*, you enable your content object to be launched from a security domain other than the security domain of SAP SuccessFactors Learning. For example, if you serve content from `https://content.host.com` and SAP SuccessFactors Learning is served from `https://lms.company.com`, you need the CDS.

> **Note**
>
> If cross security domain isn't enabled for an object served from a different security domain, users' completion isn't tracked.

Required fields are marked on the screen with an asterisk (*).

This field...	Is used as follows...
Enable Communication Cross Security Domain through Proxy	Click this check box to allow cross security domain communication. You must have the*Cross Security Domain Solution* configured.
Content Server Wrapper Page Path	The content server wrapper page path is the directory on your content server where you extracted the wrapper files. It must be an absolute URL. The default value is contained in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*, in the `defaultContentServerPath` property. In most cases, use the default setting.
Use Frame Set	Clear *Use Frameset* if your content doesn't run well when launched under a frameset.

This field...	Is used as follows...
Communication Proxy Path	This is the path to the proxlet WAR that you deployed. Must be an absolute URL. The default value is contained in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*, in the `defaultProxletPath` property. In most cases, use the default setting.

Related Information

If you are viewing this topic by itself, please see the overall cross security domain content implementation process
Customers who implement cross security domain solutions on their own often need help troubleshooting structured content, so please see the structured content information

20.2 Content Packages

A content package is a group of objectives and contents.

Content packages help you categorize objectives for query, search, and reporting purposes. Objectives are associated with questions that are asked in online exams. A single objective can be included in multiple content packages. You aren't required to create duplicate objective entities just to include an objective in more than one content package.

To view and create content packages, go to SAP SuccessFactors Learning > *Content* > *Content Packages*.

20.2.1 Learning Content Packages Summary Fields

Use the summary fields of content packages for summary information of a selected content package.

Go to > *Content* > *Content Packages* > *Summary* to review and update the summary information of a selected content package.

This field...	Is used as follows...
Content Package ID	A unique ID of the content package. **Note** A content launch error will occur if any unsupported characters are used in the launch URL or any file that the content launches. Because the launch URL is created based on the imported content zip file, please ensure all files in the import zip file and any content package IDs contain only supported characters. For more information, see Characters Not Supported in Content File Names.
Title	The name of the content package.
Security Domain	You can associate an entity with a security domain to control which administrators can access the entity. What an administrator can access and do for an entity depends on how you configured the permission restrictions of the role ID that is associated with the administrator. For more information about how you can configure access to entities, see Security.
Description	A description of the content package.
Build User	The author of the content package.
Build Location	The place where the content package was created.
Build Company	The company that built the content package.
Build Date	The date the content package was created.
Copyright	Intellectual rights of the content package.
Import filename	Identifier of the imported file.

20.2.2 Modifying SAP SuccessFactors Learning Content Package Objectives

Use the *Objectives* tab to add and remove objectives to and from a content package.

Context

This process is applicable to all content package types except SCORM 2004. To add objectives to a SCORM 2004 content package, you must add the objectives directly into the zip file before importing.

Procedure

1. Go to *Content* > *Content Packages* > *Objectives*, when you need to add or remove objectives to and from a content package.
2. To add an objective, choose *add one or more from list*.

3. If you enter objective ID, then choose *Add*.
4. Choose *Apply Changes* to save.
5. To remove an objective, select it from the list of objectives in the *Update the Objectives for the Content Package* area, and choose *Apply Changes*.

20.2.3 SAP SuccessFactors Learning Content Packages Content Tab

Use the Content Packages *Content* tab to edit the sub-structure of the content or add an object to the structure of a content package.

Go to *Content* > *Content Packages* > *Content* to make changes to the content package sub-structure or to add an object to the structure.

This field...	Is used as follows...
Objects	The layout and indentation of the items in this column represents the structure of the selected online item. The first item in this column is the item object itself. The items below it are contained within the main item object in a manner similar to files and folders in a computer file system. In a computer file system, you have a root directory/folder that contains either files or subfolders. In the structure of an online item, the item object is analogous to the root directory, the content objects and exam objects are analogous to files, and folders are analogous to sub-folders/sub-directories. Folders contain either content objects, exam or survey objects, or (sub)folders with the item objects at the top of the hierarchy.
Type	The available content types: Item, Folder, Content Object, and Exam or Survey Object.
Edit	The edit links in this window vary in purpose depending on the corresponding object type. You can either edit the master item object, a folder, a content object, or an exam or survey object, depending on the type of object that corresponds to the edit link you select.

20.3 Adding Assessments

Add assessments when you want to build an exam or a quiz to test users' learning.

Prerequisites

Before you add assessments, create a learning credit system with completion status. In almost all cases, you already have a learning credit system because customers typically set it up during initial implementation. Assessments, however, are a critical way to measure users' completion of learning content, so if this is the first time that you are adding assessments, check your learning credit system to make sure that it meets your needs.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Assessments*.
2. Click *Add New*.
3. Select the type of assessment that you want to add.
   - Select *Add New Quiz* to create a simple assessment.
   - Select *Add New Exam* to create a more formal assessment.
4. Type the basic information needed for creating the quiz or exam and then click *Create*.

Next Steps

After you create the assessment, read our guide for configuring assessments.

20.3.1 Assessment Limit for Concurrent Users

We recommend that you limit the number of people taking a learning exam to 5000 concurrent users.

If you need to have more than 5000 users take an exam concurrently, we recommend that you structure the roll-out so users take the exam in smaller cohorts to ensure system stability and functionality.

20.3.2 SAP SuccessFactors Learning Quiz Assessments

SAP SuccessFactors Learning quizzes are a learning assessment that offers simplicity.

A quiz is a set of questions that users must answer correctly to receive a passing grade. You assign quizzes to users through learning items, usually as a part of a set of online learning content. Unlike exams, all quiz questions are posed exactly as you see them when you build the quiz, which makes them simple to build. You can create a few simple rules to manage how the quiz behaves, but the rules are not as complex or flexible as exams.

20.3.2.1 Quiz Data

Each quiz object contains data that controls how it behaves.

Quiz Data

This data...	...is used as follows
General Data	The general data in the quiz is the identifying information for the quiz: the name, description and unique ID. Users see the name but not description.
Question Data	The *Questions* section contains statistics about the questions so that you can easily see how many questions you have and the type of questions. This information is useful when you want to get a sense of the: is it a long quiz? Does it include mostly true/false questions or multiple choice/multiple answer questions?
Messages	The messages section contains overall quiz messages: • The welcome message appears at the beginning of the quiz. Use it to provide some instruction to the quiz taker and a purpose for the quiz. Tell the user why the quiz is important and what to expect. • The success message appears when the user passes the quiz (reaches the passing percentage of questions answered correctly). • The failure message appears when the user fails the quiz (does not reach the passing percentage of questions answered correctly). Consider using the failure message to give the user advice about next steps. In addition the messages that you write, we include a message to tell the user about the exam. For example, before they start a quiz, the message tells users if it is a sequential or free-form exam.
Locales/Languages	A quiz can be delivered in multiple languages. In the system, each language is part of a locale. You can deliver a quiz in each language/locale that you installed on your system. Users are **not** forced to take a quiz in their default language (their default language is set in their options and settings). They can choose from among the quiz's languages.
Quiz Settings	Quiz settings define the behavior of the quiz. For example, they define what percentage of the questions a user must answer correctly to pass the quiz and whether the user must experience the questions in sequence.

20.3.2.2 Quiz Settings

Quiz settings define the behavior of the quiz.

You can change quiz settings by going to SAP SuccessFactors Learning Administration, opening the quiz in *Content* > *Assessments* and then going to *Menu* > *Settings*.

This field...	...is used as follows
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.
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.
Quiz Type	The quiz type defines how a user can progress through it. If you want to ensure that a user starts at the beginning and answers each question in sequence, select *Sequential*. To allow users to move forward and backward through the quiz, select *Free-Form*. When users launch the quiz, they see a message that tells them whether the quiz is free-form or sequential and it what means.
Passing Percentage	Users must answer at least this percentage of questions correctly to pass the quiz. Set it to zero (`0`) if you want to gather data about users' understanding but you do **not** want to use the quiz to pass or fail users. For example, you might want to test the effectiveness of the learning item without affecting the users' completion status. • Users always pass the quiz. • Users see only the completion message, not the success or failure messages. • Users responses continue to show up in reports and are still tracked.
Feedback Display	Feedback Display controls how users experience feedback when they answer individual questions. You define the feedback text in each individual question. • No Feedback: When users answer a question, they see the next question without any feedback on the one they just answered. • Show Feedback Only: For each question, you define a message that users see if they answer the question correctly and one if they answer the question incorrectly. If users answer the question **incorrectly** they do **not** see the correct answer. • Show Feedback and Correct Answer Choices: Users see the feedback messages. If they answer a question incorrectly, they also see the correct answer.

This field...	...is used as follows
Results Summary	If you enable results summary, then at the end of the quiz, users see a summary of how they performed on the quiz. They see their percentage score and the number of correctly answered questions out of the total number of questions.
Enable Quiz Review	If you enable quiz review, then users can go back and review the quiz immediately after they submit the quiz. They cannot, however, open a quiz after they have ended the quiz session. Learning items inherit their value for *Enable Quiz Review* from the value you set on the quiz. When editing a learning item, however, you can choose not to inherit the value.
Quiz Attempts Limit	This controls the amount of times a user can launch the quiz. For example, if you set it to **2**, the user can click the link to open the quiz two times. We recommend that you tell the user the attempts limit in the welcome message.
Allow Exit and Resume	If set to *Yes*, then users can submit some questions in the quiz, then close the quiz session, then start the quiz again. Any questions that they have already submitted persist their answers. Users see their answers when they launch the second session.

20.3.2.3 Quiz Messages

Add messages to your quiz to help orient users to events in the quiz.

Message Type	Purpose of Message
Welcome Message	The welcome message provides the context of the quiz and instructions for the quiz. Users see it when they first launch the quiz. Users always see a system message that tells them how they can navigate the quiz (based on your choice of quiz type in the quiz settings).
Success Message	The success message appears when users pass the quiz. To pass the quiz, users must answer enough questions correctly to meet the passing percentage. For example, if the passing percentage is 80% on a ten question quiz, and the users answer at least eight questions correctly, they see the success message. If users cannot fail the quiz (if the passing percentage is zero) then the success message is not important.

Message Type	Purpose of Message
Failure Message	The failure message appears when users fail the quiz. To fail the quiz, users must answer fewer questions correctly than the passing percentage. For example, if the passing percentage is 80% on a ten question quiz, and the users answer fewer than eight questions correctly, they see the failure message. If users cannot fail the quiz (if the passing percentage is zero) then the failure message is not important.

20.3.2.4 Rules that Control Assessment Sessions and Iterations

Assessment takers can take the assessment in more than one sitting (more than one browser session) based on settings and rules.

If users attempt to launch quizzes multiple times, the results of their attempts are limited by *Allow Exit and Resume* and *Attempts Limit*.

Rules for Iterations

Allow Exit and Resume	Attempts Limit	Results
Off	Unlimited (**0**)	A new iteration is created every time the user attempts to launch the assessment (in any browser). In this case, the important setting is *Attempts Limit*. Because the assessment does not limit the amount of attempts (iterations), each launch counts an iteration, but the assessment allows the iteration to go forward.
Off	Limited (greater than **0**)	A new iteration is created every time the user attempts to launch the assessment (in any browser). If the number of iterations has been exceeded, the assessment locks. The user can no longer open it. In this case, the important setting is *Attempts Limit*. Because the assessment does not limit the amount of attempts (iterations), each launch counts an iteration, but the assessment allows the iteration to go forward.

Allow Exit and Resume	Attempts Limit	Results
On	Limited or unlimited (any value)	The assessment respects any limits set, as above. If you set a limit, the assessment locks after the users exceed the limit of iterations (attempts). With *Allow Exit and Resume* on, the system adds session progress control. If a user is currently attempting the assessment, and has not submitted the assessment for grading, every time the user launches the assessment (in any browser), the users are working in the same iteration. For example, if a user answers three of 10 questions in one browser session then clicks the close button and then opens another browser session (even a concurrent browser session), the system puts the user in the same iteration (attempt), starting at the fourth question. Because users are in the same iteration, they: • Cannot change the answer for a question that has been submitted. Users submit a question by either clicking the check answer button (in a free-form assessment) or by going to the next question (in a sequential assessment) • See the answers from previous sessions. • Cannot re-submit the same iteration: if they open an assessment in Microsoft Internet Explorer, for example, and also in Google Chrome at the same time, and if they submit their first attempt in Internet Explorer, any submission in Google Chrome is counted as a second iteration.

20.3.2.5 Quiz Question Fields

Different question types share these common fields.

Quiz Question Fields

This field...	...is used as follows
Question Type	The question type defines how the user answers the question.
Question/Answers	The question that the quiz presents to the user and the possible answers. The selected answer is the correct one.
Correct/Incorrect Answer Feedback	The text that users see when they answer the question correctly or incorrectly. To use feedback, you must have feedback enabled on the quiz.
Randomize Answers	If you select *Randomize Answers*, the system randomizes the order of the answers. Randomizing answers creates a more secure exam because users cannot predict a pattern to the order. They cannot, for example, know that the first answer in a question is always correct. It also saves you time when you create questions: you don't need to think about where you place the correct answer: the iteration moves it for you. Randomization is not helpful in some cases. Questions like fill-in-the-blank or true/false do not benefit from randomization. Consider disabling question randomization for questions that use “All of the Above” or “None of the Above” type of answers. If you enable randomization in this case, the “All of the Above” and “None of the Above” distractors can, at run time, have nothing above them.

20.3.2.6 Creating and Modifying Quizzes

Create and modify quizzes when you want a quick test of users' knowledge.

Context

Quizzes are straightforward tests that you can build quickly. Build a quiz when you want to test users' knowledge of a subject and you need simple rules to the quiz.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Content* > *Assessments*.
2. If you want to create a new quiz, choose *Add New Quiz* and perform the following substeps.
   a. In *Add New Quiz*, enter the following information.

Quiz ID	Unique identifier of the quiz
Quiz Name	Title of the quiz
Description	Brief overview about the quiz

   b. Select the required language from the *Primary Locale* dropdown list.
   c. If you want to change the default domain, search and add the required domain in *Security Domain*.
   d. Set *Active* to *Yes*.
   e. Choose *Create*.

      The quiz overview page opens.

3. If you want to modify an existing quiz, search for it and open it.

> → Tip
>
> If you already have a quiz that already has the settings you want for this quiz, consider copying the existing quiz as a template.

4. In the `<quiz name>` *Overview* page, choose *Add Locale* to make the quiz available in another language.
   a. In *Add Locale*, select the required locale from the *Locale* dropdown list.
   b. Provide a name in *Quiz Name*.
   c. Choose *Save*.
5. To modify the messages that users see when they interact with the quiz (as opposed to individual questions), go to *Menu* > *Settings* > *Localized Settings*.
6. To manage the behavior of the quiz, go to *Menu* > *Settings* > *Global Settings*.
7. Choose *Save*.

20.3.2.7 Quizzes' Primary Locales

Each quiz has a primary locale (language), which models the quiz for other locales.

The primary locale of a quiz is the model for every other locale of the quiz. For example, if the quiz's primary locale has ten questions, the other locales must also have ten questions. If the first question of quiz in the primary locale is a True/False question, then the first question of the quiz in every other locale must be True/False also. The secondary locales can change the text of the question and change the text of the answer, but they cannot (for example) add additional questions or additional answers.

When you create a quiz for the first time, the quiz's primary locale defaults to your primary locale. If you support users in a single language, then you can use the default. If you need to switch the primary locale, click *Edit button* in the *Locale* section to switch the primary locale. For a new locale to be the primary locale, it must have the same number of questions and be in the same publish state as the **current** primary locale.

> **Note**
>
> A quiz's primary locale is indicated with the text *(Primary)*.

20.3.2.8 Troubleshooting Quizzes

If you are having trouble with a quiz, see these troubleshooting tips.

Cannot Publish a Quiz in a Secondary Locale

If your primary quiz locale is English, and you cannot publish a secondary locale (like Spanish), then check the following:

- Your secondary locale must have the same number of questions as your primary locale.
- Your primary locale must be published before you can publish secondary locales.

20.3.3 SAP SuccessFactors Learning Exam Assessments

SAP SuccessFactors Learning exam assessments provide a robust way to measure learning outcomes.

In SAP SuccessFactors Learning, an assessment can be either a quiz or an exam. Quizzes are simple to create and offer limited functionality. Exams are more complex to create and offer robust configuration options to assess user learning. For example, you can use exams to automatically adapt course content to users' current knowledge level.

To use exams, we recommend that create a holistic strategy for assessing users. Determine, for example, how you want your organization's assessments to behave, what kind of learning outcomes (objectives) you want to test, and the remediation plan for users who don't pass the exams.

Transition from Legacy Exams to Exam Assessments

In Q3 2017, we released the next generation of exams, which we're calling assessment exams. To give you time to adjust to the next generation, the legacy exam system is still available. This can be confusing because you might see parallel legacy exams and assessments at the same time. We encourage system administrators at your organization to limit access to the legacy exams to avoid confusion.

- In the legacy exam system, you created questions in *Content* > *Questions* and exams in *Content* > *Exam Objects*.
- In the new assessments system, you create questions in *Content* > *Questions (Legacy)* and exams in *Content* > *Exam Objects (Legacy)*.

20.3.3.1 Creating Adaptive Exams: Overview

Create adaptive online exams to adapt learning content based on pre-tests and post-tests.

Context

Adaptive exams adapt users' experience with the training content based on pre-tests or post-tests. Based on how users score on an adaptive exam, flags are set or changed on the content. In a pre-test, for example, users might demonstrate proficiency in three of four content objects. If they do, they see that three of the four content objects marked complete and they can skip to the fourth content object.

Procedure

1. Create objectives to describe the testable outcome of instruction.

   The adaptive exam measures users' ability to meet the objectives. If users can demonstrate, through the exam, that they meet the objective, then the content objects (the training material) that teaches the objectives is marked complete. If they can't meet the objective, users see that they need to review it.
2. Associate the objectives with content objects (or content packages or items) that teach the knowledge described in the objectives.

   When you connect the testable objective with the content objects (the training material), you connect the expected outcome with the content that helps users reach the outcome. If users can reach the learning outcome on their own, without reviewing the content, they can test out of the content (not review the content, because they already understand it).
3. Create an online learning item (on demand course) as a container for the content objects and the adaptive exam.

   Learning items are the assignable unit of learning (a course) in SAP SuccessFactors Learning. They're where you bring together content objects (the training materials) and the adaptive exam that, at run time, adapts users' experience of the content objects.
4. Add the content into the learning item and prepare it.

   For ease of use, add the content before you add the adaptive exam. When you add the content first, you gain a better understanding of all the objectives you plan to measure and you can see the course take shape **before** you begin thinking about how it adapts at run time.
5. If you don't already have the questions you need, create them in *Question Library*.

   You often have a library of questions already created and associated with objectives. If you already have your questions in the library, consider double-checking them to make sure that they're associated with objectives. If you don't have the right questions, add them in *Question Library* and associate them with the objective. When you associate them with the objective, you indicate that, by answering the question correctly, the user is demonstrating some proficiency in the learning objective.
6. If you don't already have the exam you need, go to *Assessments* to create it and in its settings, configure it to be adaptive.

Although you can create complex adaptive exams, most customers can use one of two types of adaptive exams:

- A simple pre-test adaptive exam that users take one time at the beginning of the learning item and that toggles content to **complete** when users demonstrate proficiency in its objectives. Simple pre-tests can be paired with an exam-for-grade at the end of learning item.
- A simple post-test adaptive exam that toggles content to **complete** when users demonstrate proficiency or to **needs review** when they don't.

7. Add the objectives to the exam and set their passing percentage.

   The passing percentage determines how many points from questions users must answer correctly to pass the objective. Each question in the objective has a point value.

   - If users score enough points to meet or exceed the objective passing percentage, they have demonstrated proficiency in the objective and content is marked complete.
   - If users don't score enough points to meet or exceed the objective passing percentage, they haven't demonstrated proficiency and the content either remains in its current state (not complete) or it changes to needs review.

8. Go back to the learning item that contains the content, and then add the adaptive exam.

   When you add the adaptive exam, you place it in the correct sequence (first for pre-tests and last for post-tests) and you make settings adjustments to enable it to adapt the content.

9. Test the adaptive exam.

   Adaptive exams have many settings spread across many parts of SAP SuccessFactors Learning, so you have many opportunities to make mistakes. Because you can create complex configurations of adaptive exams, SAP SuccessFactors Learning doesn't know if you intended to enable the adaptation or if it's a configuration mistake. For these reasons, we recommend that you test your adaptive exams by assigning them to test users before you assign them to your employees.

1. Adding Learning Objectives [page 688]
   Add learning objectives to identify what you want users to learn and to measure their mastery of that subject.
2. Assigning Learning Objectives to Content Objects [page 689]
   Assign objectives to content objects to signify that a content object helps employees meet an objective and to create adaptive online exams.
3. Creating Online Courses [page 690]
   Create online courses when all of the learning content can be consumed online and on demand.
4. Setting Content Objects in Learning Items for Adaptive Exams [page 692]
   Set content objects for learning items in adaptive exams so that the content object behaves correctly for the adaptive exam.
5. Adding Questions to the Question Library [page 693]
   Add questions to the question library so that you can use them in exams.
6. Getting a List of Objectives to Add to Adaptive Exams [page 694]
   Get a list of the objectives to add to adaptive exams so that you are prepared to add them to adaptive exams.
7. Configuring an Exam to Be a Pre-Test Exam [page 695]
   Configure an exam to be a pretest exam so that users can test out of learning content when they can demonstrate proficiency at the beginning of the online course.
8. Configuring an Exam to Be a Post-Test Exam [page 696]

Create adaptive post-tests to flag content objects that users need to review when they can't demonstrate proficiency in the learning outcomes of the content object.

9. Adding Objectives for Adaptive Exams [page 697]
   Add objectives for adaptive exams so that you can test users proficiency in the objectives and adapt the learning item to their performance on the exam.
10. Adding Adaptive Exams to Learning Items [page 698]
    Add adaptive exams to learning items.

20.3.3.1.1 Adding Learning Objectives

Add learning objectives to identify what you want users to learn and to measure their mastery of that subject.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Objectives*.
2. In *Name*, type a name for the objective that describes the objective.

   For example, if you want users to demonstrate business ethics, type **`Business Ethics`**.
3. In *Description* type a more complete description of a positive outcome.

   For example, if a positive outcome of the objective is that users recognize conflicts of interest, then you can type **`Users will be able to identify conflicts of interest in their business dealings.`**
4. Clear *Online*.

   Although *Online* should be clear by default, verify that it is **not** selected. Keep the objective offline until you are ready to use it in other parts of SAP SuccessFactors Learning.
5. Click *Add*.

Task overview: Creating Adaptive Exams: Overview [page 686]

Next task: Assigning Learning Objectives to Content Objects [page 689]

Related Information

Learning Objectives [page 439]
Using an Existing Learning Objective as a Template for new Objectives [page 435]
Storing Custom Data in a Learning Objective [page 436]
Adding Competencies to Learning Objectives [page 476]
Learning Objective Summary Fields [page 434]

20.3.3.1.2 Assigning Learning Objectives to Content Objects

Assign objectives to content objects to signify that a content object helps employees meet an objective and to create adaptive online exams.

Prerequisites

Before you can assign objectives to content objects, create the objectives. You can create objectives by going to *Content* > *Objectives*.

Context

If you are using learning objectives, you have a set of objectives that represent learning outcomes. For example, you can create a learning objective that represents the learning outcome "User knows the safety checklist for removing hazardous materials." You associate that objective to the content object for your own tracking and reporting but also so that SAP SuccessFactors Learning can generate adaptive online exams: if a user can, for example, score high enough on questions that measure the hazardous materials objective, the user can test out of the content object that teaches the hazardous materials content.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Content Objects*.
2. Search for and edit the content object that addresses the learning objective.
3. Go to *Objectives*.
4. Click *add one or more from list* to find the objective that this content object teaches.

   You can add more than one objective.

Task overview: Creating Adaptive Exams: Overview [page 686]

Previous task: Adding Learning Objectives [page 688]

Next task: Creating Online Courses [page 690]

20.3.3.1.3 Creating Online Courses

Create online courses when all of the learning content can be consumed online and on demand.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*
2. Choose *Add New*.
3. In *New Item*, choose *Online* as the *Item Classification*.
4. Select the default language of the learning item in the *Locale* dropdown.
5. Make selections for *Item Type* and *Completion Status* (required fields).
6. Complete the remaining fields in *New Item*.

   These fields populate the learning summary fields of the object. You can change them later except for *Item Type* and *Item ID*:

Field Name	Description
Item Type	Select an item type that categorizes the item (for example, a course, an exam, or on-the-job training). As an administrator, you can use an item type as a filter in searches and reports. You can create or modify item types in the Item Types section (*References* > *Learning Activities* > *Item Types*). Don't use the'|'(Pipe) character while giving a name to the Item Type.
Item ID	After you select an item type, you can either choose *Auto Generate ID* or manually enter a unique item ID that users can search for. We recommend that you create a descriptive naming strategy so that users can identify the item more easily. Don't use the'|'(Pipe) character while giving a name to the Item ID.

7. If you're tracking credit or contact hours, enter values in the *Course Overview* section.

Field Name	Description
Contact Hours	Most customers don't record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use contact hours. Contact hours are the total number of hours that you expect a user to have contact with an instructor. For example, if you set up a learning item that is instructor-led with online content for 8 total hours and, for 6 of those hours, you expect the user to be in an instructor-led time slot, then the contact hours equals 6.

Field Name	Description
Credit Hours	Most customers do not record hours at all, but a few need CPE (Continuing Professional Education) hours because of their industry. Almost no customers use credit hours. Credit hours are the number of hours that a user earns for completing a learning event. For example, in many U.S. universities, students attend a single class for 15 weeks, 3 days each week, and 1 hour each day. In this case, the total hours equals 45; however, the college grants 3 **credit hours** for this class.
CPE Hours	CPE is an abbreviation for Continuing Professional Education and refers to learning activities that users perform to maintain and expand the skills that their profession demands. Some customers in some industries use CPE hours for certification. If you are in an industry that uses CPE hours for certification, please use the *CPE Hours* field instead of credit hours or contact hours. If you are not in an industry that uses hours to certify employees, you can ignore CPE hours.

8. If you're revising items, enter values in the *Version Details* section.

Field Name	Description
Revision Date and Time	If you're adding this at a later revision, enter the revision date. The revision date doesn't need to be today's date. If for example, you're bringing a learning item that was revised three years ago into the Learning Management System (LMS) today, then the revision date can be three years ago.
Revision Number	The same is true for revision number. The revision number often matches the revision number as provided by the oversight organization or by the content provider.

9. To save the new item, choose *Save*.

Next Steps

Add the online content to the new learning item.

Task overview: Creating Adaptive Exams: Overview [page 686]

Previous task: Assigning Learning Objectives to Content Objects [page 689]

Next task: Setting Content Objects in Learning Items for Adaptive Exams [page 692]

Related Information

Settings That Control Online Content in a Learning Item [page 47]

20.3.3.1.4 Setting Content Objects in Learning Items for Adaptive Exams

Set content objects for learning items in adaptive exams so that the content object behaves correctly for the adaptive exam.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that already has the adaptive exam or that you plan to add the adaptive exam to, and then go to *Online Content*.
3. For each content object, decide how prominent you want to make the objectives for users.

Choice	Description
Objective Review Enabled	When you select this option, users can review the objectives in content. Select if you want users to be aware of the learning outcomes that are expected of them.
Objective Review Optional	When you select this option, users can opt out of reviewing the objectives in content. Select if you want to make the objective review optional.

Task overview: Creating Adaptive Exams: Overview [page 686]

Previous task: Creating Online Courses [page 690]

Next task: Adding Questions to the Question Library [page 693]

20.3.3.1.5 Adding Questions to the Question Library

Add questions to the question library so that you can use them in exams.

Prerequisites

Before you can add questions to the question library, the question library must be enabled.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Question Library*.
2. Click *Add New*.

   The *Create Question* dialog opens.
3. Type a unique question ID in *Question ID*.
4. Select a question type in *Question Type*.

   A question type defines how users answer the question.
5. Assign a default point value for the question in *Points*.
6. Set a default locale for the question.

   The default locale is the source language for the translation.
7. Provide a description about the question.
8. Select a security domain for the question.
9. If you know the objective that the question tests, add the objective in *Objective*.

   When you add objectives to questions, the question is added to the objective question pool.
10. Select *Active* to make the question usable in the system.
11. Choose *Create*.

Next Steps

After the question opens, you can refine it or you can choose *Add Question* to add another or you can add a variant to the question.

Task overview: Creating Adaptive Exams: Overview [page 686]

Previous task: Setting Content Objects in Learning Items for Adaptive Exams [page 692]

Next task: Getting a List of Objectives to Add to Adaptive Exams [page 694]

20.3.3.1.6 Getting a List of Objectives to Add to Adaptive Exams

Get a list of the objectives to add to adaptive exams so that you are prepared to add them to adaptive exams.

Context

Adaptive exams rely on objectives, but objectives are loosely connected to the learning item where you add them. Objectives are associated to content objects and then content objects are associated to learning items. To create an adaptive exam, you need to know all inherited objectives in a learning item.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that should have the pre-test.
3. Go to *Objectives*.

   > → Tip
   >
   > You usually need to choose *More* to see *Objectives*.

4. Copy the contents of *Inherited Objectives* and paste them into a text file.

   If you do not see inherited objectives, or if you do not see the objectives you expect, then you might have added the wrong content objects in *Online Content*.
5. Save the text file.

Next Steps

Use the list of objectives when you add objectives to your adaptive exam. It is your checklist of all objectives that users should be tested for.

Task overview: Creating Adaptive Exams: Overview [page 686]

Previous task: Adding Questions to the Question Library [page 693]

Next task: Configuring an Exam to Be a Pre-Test Exam [page 695]

Related Information

Inherited Learning Item Objectives [page 97]

20.3.3.1.7 Configuring an Exam to Be a Pre-Test Exam

Configure an exam to be a pretest exam so that users can test out of learning content when they can demonstrate proficiency at the beginning of the online course.

Prerequisites

- Create learning objectives that are a learning outcome and are the measure of users' proficiency in meeting that outcome. Go to *Content* > *Objectives*.
- Create an online learning item that includes the content objects so that it can be assigned to users who need to meet the learning outcomes of the objectives and content objects. Go to *Learning Activities* > *Items* to create the learning item and go to its *Online Content* page to add the online content.
- Create questions that assess users' proficiency in the learning outcome and attach them to the matching objective. Go to *Content* > *Question Library*.

Context

When employees enroll into courses, they bring with them their work experience and formal education. For example, if your Information Technology (IT) employees enroll into an online network security course, already know about networking security. Adaptive pretests enable your employees to test out of content objects where they can demonstrate mastery of the content objects' learning objectives.

For example, the IT employees can see 10 content objects in the course, ranging from social engineering to denial of service attacks. Employees sit for a pretest before the course content begins. Employees who can demonstrate proficiency in thwarting social engineering attacks, for example, can test out of the content: they don't need to review it. If however, they can't demonstrate proficiency in thwarting denial of service attacks, they must review the content.

Adaptive exams depend on you declaring the learning outcome for each content object. In SAP SuccessFactors Learning, learning outcomes are declared as learning objectives. You attach the learning objective to the content object so that the content object declares its measurable outcome.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Content* > *Assessments*.

2. Choose *Add New*, and then create a new exam.

   > → Tip
   >
   > When you complete the fields in *Add New Exam*, consider adding **`pre-test`** to the *Exam Name* and to *Description*. You configure and use pretests differently from other exams, so it's useful to distinguish them when you're looking at a list of exams.

3. In the exam, choose *Menu* > *Settings*.
4. In *Exam Attempts Limit*, type **`1`** (one).

   A single attempt assures you that users are taking the pretest one time instead of repeating the exam to excuse content that they see.

5. In *Passing Percentage*, type **`0`** (zero).

   You don't want a pretest to block users' ability to pass the learning item, even if they answer all of the questions incorrectly because the purpose of the pretest is to determine what the user knows **before** the course. You can add a second assessment at the end of the course to determine whether the user passes or fails **after** the course.

6. In *Content Object Completion* > *Set Flags for Passed Objectives*, select *Exam Passed*.

   Because the user can only take the exam one time, this configuration means that when users reach the passing percentage for the objectives in a content object, the content object switches from no flag to completed.

7. Choose *Save*.

Task overview: Creating Adaptive Exams: Overview [page 686]

Previous task: Getting a List of Objectives to Add to Adaptive Exams [page 694]

Next task: Configuring an Exam to Be a Post-Test Exam [page 696]

20.3.3.1.8 Configuring an Exam to Be a Post-Test Exam

Create adaptive post-tests to flag content objects that users need to review when they can't demonstrate proficiency in the learning outcomes of the content object.

Prerequisites

- Create learning objectives that are a learning outcome and are the measure of users' proficiency in meeting that outcome. Go to *Content* > *Objectives*.
- Create an online learning item that includes the content objects so that it can be assigned to users who need to meet the learning outcomes of the objectives and content objects. Go to *Learning Activities* > *Items* to create the learning item and go to its *Online Content* page to add the online content.
- Create questions that assess users' proficiency in the learning outcome and attach them to the matching objective. Go to *Content* > *Question Library*.

Context

Adaptive post-tests flag content for users when they can't demonstrate proficiency in the content object. Users can see the flag *Needs Review* so that they can see that they need to look at the content again. This provides feedback on learning outcomes for users: what they mastered and what they need to work on.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Content* > *Assessments*.
2. Choose *Add New*, and then create a new exam.

   > → Tip
   >
   > When you complete the fields in *Add New Exam*, consider adding **`post-test`** to the *Exam Name* and to *Description*. You configure and use post-tests differently from other exams, so it's useful to distinguish them when you're looking at a list of exams.

3. In the exam, choose *Menu* > *Settings*.
4. In *Passing Percentage*, type the percentage of overall questions that must be answered correctly to pass the exam.
5. In *Content Object Completion* > *Set Flags for Passed Objectives*, select *Exam Passed* and *Exam Failed*.

   Because post-tests are at the end, and because you usually select *Record history record when all content is complete* , you want to toggle flags to *Needs Review* when users fail and back to *Complete* when they pass the objective.
6. Choose *Save*.

Task overview: Creating Adaptive Exams: Overview [page 686]

Previous task: Configuring an Exam to Be a Pre-Test Exam [page 695]

Next task: Adding Objectives for Adaptive Exams [page 697]

20.3.3.1.9 Adding Objectives for Adaptive Exams

Add objectives for adaptive exams so that you can test users proficiency in the objectives and adapt the learning item to their performance on the exam.

Prerequisites

Create the exam and set it as either an adaptive pretest or an adaptive post-test.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Assessments*.
2. Find and open the adaptive exam, and then open the locale you want to change.

   You usually change the primary locale, which for most customers are English.
3. Choose *Add* > *Objective*, and then add the objectives that its pretest measures.

   If you go to *Learning Activities* > *Items* > *Objectives* to get a list of objectives in the learning item for this adaptive exam, you can use that list to add all objectives.
4. For each objective, choose *Settings* ⚙ *Settings Cog Wheel* and then, in *Objective Settings*, configure the passing percentage that users must meet to show proficiency in the objective, the default weight of each question and the number of questions to include from the pool of questions in the objective.

   > → Tip
   >
   > In most cases, you can set *Number of Questions to Include* and *Passing Percentage* and leave *Points per Question* at the default value. You can set a default point per question if you want to weight questions in the objective differently for this exam.

Next Steps

Check to see if the exam is published so that you can add it to the learning items.

Task overview: Creating Adaptive Exams: Overview [page 686]

Previous task: Configuring an Exam to Be a Post-Test Exam [page 696]

Next task: Adding Adaptive Exams to Learning Items [page 698]

20.3.3.1.10 Adding Adaptive Exams to Learning Items

Add adaptive exams to learning items.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Learning Activities* > *Items*.
2. Search for and open the learning item that needs the adaptive exam.
3. Go to *Online Content* (tab), then choose ••• *More* and select *Add Assessment*.

4. In *Assessment*, search for and select the assessment that you want to add to the learning item.
5. In *Assessment Title*, enter a name that helps users identify the nature of the assessment. Choose *OK* to save.

   For example, if the assessment applies to office management, then the title could be **Office Management Assessment**.
6. In *Settings* > *Completion*, set the behavior of the assessment.

Selection	Description
Add to History on Pass	For adaptive exams, clear the checkbox because you don't want the exam to be used for the purposes of recording learning.
Add to History on Failure	For adaptive exams, clear the checkbox because you don't want the exam to be used for the purposes of recording learning.

7. Set *Add to History on Completion of All Content* to On.

   You select this option because adaptive exams work by triggering content object flags. They are either *Complete*, null (user has not interacted with the content object), or *Needs Review*. When all flags are *Complete*, the learning item is complete.
8. Make any other settings adjustments that you need to make.

   For example, if you have not set a completion status for when all flags are complete, set it now.
9. Choose *OK* to save and return to the *Online Content* page.
10. For pre-test adaptive exams, make sure that the assessment is first in the list of content inside *Online Content*.
11. For post-test adaptive exams, make sure that the assessment is the last in the list of content inside *Online Content*.

Next Steps

Test the exam by assigning the learning item to a test user and working through the exam.

Task overview: Creating Adaptive Exams: Overview [page 686]

Previous task: Adding Objectives for Adaptive Exams [page 697]

20.3.3.2 Adding Objectives to Exam Assessments

Add objectives to exam assessments when you want the exam to test users' proficiencies in a learning objective by drawing on a bank of questions associated with the objective.

Prerequisites

The objective must exist in *Content* > *Objectives*. In most cases, you also want to add them to content objects or learning items to create a connection between the course or content and the objective it addresses.

For the objective to be useful, you must also go to *Content* > *Question Library* add questions and then associate the questions with the objective. You can continue to associate questions with objectives after you add the objective to the exam, but you should add most questions to the objective before adding the objective to the exam assessment.

Context

There are two reasons to add objectives to exams:

- You want to test users proficiency in a learning outcome (an objective) and you want to draw randomly from a set of questions in an objective pool.
- You want to draw questions randomly from the objective pool, but you also want to create an adaptive exam.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Assessments*.
2. Find and open the unpublished exam that you want to add objectives to.

   You can't add objectives to quizzes or published exams.
3. Go to *Menu* > *Questions*.
4. At the bottom of the left panel, click + *Add* and then click *Objective*.
5. Select the objective that you want to add to the exam.

Related Information

Question Library [page 711]
The Relationship Between Questions and Objectives [page 723]
Enabling the Question Library [page 712]
Adding Questions to the Question Library [page 712]

20.3.3.2.1 Randomization in Exams

Randomization varies the questions, the wording of the questions, and the order of answers in exams at run time.

You can design questions so that when two different users are assigned the same exam, each sees different questions. Both exams measure the learners' understanding of objectives, but each copy of the exam use a different set of questions and a different variation of the answers to measure the users.

Related Information

Question Randomization [page 703]
Variant Randomization [page 714]
Answer Randomization [page 713]

20.3.3.2.2 Objective-Based Question Pools

Objective-based question pools are a set of questions that all measure the same learning objective.

All the questions associated with an objective go into a question pool. Later, when an exam tests learners' on that objective, it randomly draws from that objective's pool of questions.

> **Note**
>
> Question pools are a prerequisite to adaptive exams.

An exam can be a mix of questions from pools and questions that have been directly selected for the exam. This can be common, for example, if you have a few introductory questions that you always want to ask on every exam and then a set of objectives that you want to measure. When you mix directly selected questions and questions from pools, the following rules apply:

- If a question is in a pool that the exam is using and you also directly select it for the exam, then the directly selected question is no longer part of the pool. The number of available questions decreases by one.
- A directly-selected question has its own point value, independent of the objective.
- The directly selected question retains its relationship with the objective. If you use the objective to set and clear flags for adaptive exams, all questions from the objective pool count toward the flag and the directly selected questions from the objective also count.

20.3.3.2.3 Adjusting the Behavior of Objectives in Exams

Adjust the behavior of objectives in exams to change the default points peer question, the number of questions to include, and the passing percentage for the objective (as opposed to the exam).

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Content* > *Assessments*.
2. Open the exam with the objective that you want to modify.
3. Click the locale that you want to edit.

   You usually want to edit the primary locale, and the primary locale is usually English.
4. To change the default points per question and the required points per question for randomly included questions, set *Points per Question*.
5. To set the required number of questions to include from the pool, change *Number of Questions to Include*.
6. To set the percentage of points that must be answered correctly to pas the objective, set *Passing Percentage*.
7. Click *OK*.

20.3.3.2.4 Adjusting the Behavior of an Objective

Adjust the behavior of objectives to change the points per question for required questions and the inclusion rules.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Content* > *Assessments*.
2. Open the exam with the objective that you want to modify.
3. Make sure that the locale that you want to edit is unpublished.

   You can't change the behavior of questions in an objective if the exam locale is published.
4. Click the unpublished locale that you want to edit.

   You usually want to edit the primary locale, and the primary locale is usually English.
5. Select the objective that has the questions you want to edit.
6. Choose *Settings*.

   The *Objective Settings* dialog opens.
7. To change the points for mandatory (always included) questions, for this objective in this exam, change *Points per Question*.
8. Enter the number of questions to include in the objective.
9. Enter the required percentage to pass this exam in *Passing Percentage*.

10. Choose *OK*.

20.3.3.3 Question Randomization

Question randomization assures that each instance of an exam includes different questions presented in a different order.

Randomization for Free-Floating Questions

To increase the variation of the exams that you present to learners, you can introduce question randomization in the exam settings. At run time, when SAP SuccessFactors Learning creates an instance of the exam, it places free-floating questions in a random order. The setting applies only to free-floating questions, not to questions in an objective.

Randomization in Objectives

When you associate questions to an objective and you add the objective to an exam, you also set a number of questions that must be drawn from the pool of questions on the objective. When SAP SuccessFactors Learning creates an exam iteration, it draws questions randomly from the pool. For example, if an objective pool has 20 questions and you configure the objective in the exam to include 10, then SAP SuccessFactors Learning randomly chooses 10 questions from the 20 and presents them to a user in a random order. The next user to take the exam sees a different, random 10 questions in a different, random order, and so on.

Randomization is not the primary purpose of question pools. They are best used to bind together questions based on a testable objective so that you can create adaptive exams. Including questions by objective is one way to include questions on exams.

20.3.3.4 Previewing an Exam

Preview exams to see how they appear to users at run time.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Assessments*.
2. Find and open the exam that you want to preview.

   If you have the exam open already, go to *Menu* > *Exam Overview*.

3. For the locale that you want to preview, click *Preview* .

20.3.3.5 Exam Assessment Settings

Exam assessment settings control how users interact with the exam assessment.

To change the value of exam settings, open the exam in *Content* > *Assessments* , select the item you want to edit, and then go to *Menu* > *Settings* . To see the specific behavior of each of these settings **in your environment**, please preview the exam.

To configure the assessments to generate unique exams for printing and recording scores in the system go to *Menu* > *Print Exam* .

General Exam Settings

This Field...	**...Is used as follows**
Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Active	When set active to *YES*, the exam is available for assignment to online items, for reports, and for revision.

Proctor Settings

This Field...	**...Is used as follows**
Proctor code is required to begin exam	When you check this box, the instructor must enter a proctor code in order for a student to begin the exam.
Proctor must be an authorized instructor for the item	When you check this box, the system enforces that the instructor must authorized for the item.

Exam Behavior

This Field...	...Is used as follows
Exam Type	Exams can be sequential or free-form. Sequential exams require users to answer each question in order before they can move on to the next question. Free-form exams allow the user to move backward and forward in the list of questions regardless of whether they have answered the question. To read more about sequential and free-form exams, see Exams.
Feedback Display	You can choose from among these options to determine how the exam offers feedback to users when they interact with the exam: • No Feedback withholds all feedback from users as they progress through the exam. • Show Feedback Only shows the answer feedback that you write for each question, but does not mark the correct answer for the user. • Show Feedback and Correct Answer Choices shows the answer feedback that you write for each question, and it marks the correct answer for the user.
Exam Attempts Limit	The number of times a user can attempt the exam before losing permission to access the exam. If you type **0**, users can attempt the exam an unlimited number of times.
Display Points to User	If set to *YES*, then users see the points of questions when they take the exam.
Resumable	When you set this to *YES*, then a user is allowed to log off in the middle of an exam and complete it later. If the checkbox is not selected, users must complete it in one session. To add a time duration to an exam, it must not be resumable.
Randomize Questions	If set to *YES*, the sequence of the questions is random. If set to *NO*, then the questions appear as you see them in the exam workspace. The sequence of the questions in the objective is also as it appears when you view the objective.
Time Duration	The maximum length of time a user has to complete the exam. Timed assessments cannot be resumable.

Post Exam Behavior

This Field...	...Is used as follows
Results Summary	When set to *YES*, users see the overall results of their exam at the end of the exam, including their score.
Results Details	When set to *YES*, users see the results of their exam at the end of the exam. The details include the percentage that users received overall, an overview of the questions and objectives, and how they scored on individual questions and questions in an exam.
Allow Exam Review	When set to *YES*, users have the opportunity to go back and review the exam iteration.
Passing Percentage	The minimum percentage of correct points of the total that result in a passing grade. If a user's score is within one half of a percentage point of the pass percentage value, the score is not rounded up to the minimum passing grade.

Post Exam Actions

This Field...	...Is used as follows
Lock Exam	Select *Exam Passed* to prevent users from accidentally retaking the exam and changing their scores after they pass. Select *Exam Failed* to require an intervention from an instructor or administrator when users fail. You can go to the users' record in *People* > *Users* > *Content Status* to unlock the exam.
Lock and Exit Item	Select on either *Exam Passed* or *Exam Failed* to prevent users from going back and looking at the learning item after they either pass or fail the exam.

Content Object Completion

Use content object completion settings when you create adaptive exams.

This Field...	...Is used as follows
Clear All Objective Flags	This setting applies when users have failed the overall exam and is usually set for adaptive post-tests. When you select this checkbox, the *Needs Review* flag is set, and the *Complete* flag is removed for all objectives in the exam for the current learning item. It is the most severe consequence for a user failing to achieve the overall passing exam score. The user loses credit for completing all objectives that are represented by a question on the exam, even if he or she passed the objective. The user's curriculum status is only affected for the item in which this exam appears.
Set Flags for Passed objectives	This setting applies when users have passed objectives. In most cases, it applies to adaptive pre-tests and in those cases, you set it for *Exam Passed*. The user receives credit for passing objectives. For passed objectives, Needs Review flags are cleared, and Complete flags are set. Users can pass specific objectives and fail the overall exam. A selection of *Exam Failed* is uncommon because regardless of whether you select it for *Exam Passed* or *Exam Failed*, the behavior is the same: the *Complete* flags are set for passed objectives. In most cases, if a user fails an exam, then *Complete* flags are not important. You usually want some larger process to take over: for example, the user must retake the learning item, lose credit or qualification, and so on. In the case of failed exams, you typically select *Exam Failed* in *Clear All Objective Flags* or *Exam Failed* in *Clear Flags for Failed Objectives*.
Clear Flags for Failed Objectives	This setting applies when users have failed an objective. Flags are cleared for failed objectives only. Passed objectives are handled by *Set Flags for Passed objectives* and *Clear All Objective Flags*. The most common case for this setting is to select both *Exam Passed* and *Exam Failed* when you create an adaptive post-test.

Printed Exams

An assessment can be printed so that the student can be administered the exam in hard copy format, and their scores can be entered manually by the administrator using the scoring interface.

This Field...	...Is used as follows
Generate Unique Exams	This applies when you want to print a certain number of unique exams. When you enter a value from 1 to 999 and select the *Generate* button, the selected number of unique exams appears in the table.
Print an Exam	When you select one or more *Exam Iteration IDs*, you can then select *Print Exam* and *Print Answer Key* to have the exams and answer keys appear in a printable HTML format.
Record Scores	Once the printed exam is complete you can select *Score* for each Exam Iteration ID and then enter the student's *User ID* and the *Item ID* to display the list of exam *Objects* that were on the student's printed exam. You can now enter the *User Answers* for each *Question Number*. When you are done, select *Finish* and you will have the option to *Record Another User* or *Go Back to Exam Iterations*.

20.3.3.6 Exam Localized Settings

The localized exam settings are unique to a particular language.

To access localized settings, open the exam in *Content* > *Assessments*, select the locale you want to edit, and then go to *Menu* > *Settings*. Click *Localized Settings*. To see the specific behavior of each of these settings **in your environment**, please preview the exam.

This field...	...Is Used as Follows
Locale	Use to switch the settings to a new locale without going back to the exam overview page.
Exam Name	The name of the exam in the locale you set.
Description	A description of the exam to help identify it from among other exams in the system.

This field...	...Is Used as Follows
Messages	The *Additional information on welcome page* message is the text that users for this language see before they take the exam. Leave it blank if you do not want a welcome message. The *Success* and *Failure* messages is the text that users for this language see after they take the exam, and depending on if the pass or fail. Leave them blank if you do not want completion messages. The *Additional message for Proctored Exams* message only appears of the exam was indicated as a proctored exam. This is additional text that you can use to inform users about how the exam is administered.

20.3.3.7 Information About Migrating Legacy Questions to Assessment Question Library

To migrate questions from the legacy system to assessments, you export them with the legacy tool and import them with the assessments tool. During that process, you need to be aware of some differences.

- The legacy question editor allows setting different points for each variant in a question. In question library, variants can have different point values.
  - If you want to use different points for variants, then edit export file before importing to the question library.
  - If you want variants to maintain the same point value, you can simply import the file so that all variants begin with the same point value. You can change this later in *Question Library*.
- Review the legacy question export file and make required edits before importing to Question Library. For example, if any label other than True/False is specified for True or False questions for an answer choice, then the question library import rejects it. Check errors to resolve issues.
- Data related to unsupported features is **not** migrated: keywords and custom fields.
- If the legacy question editor True or False question has formatting for answer choices, it is stripped by the question library import.
- If the legacy question editor question has multiple images in question text or answer choice, the question library import process imports only one image.
- If the legacy question editor question has images outside of the question text and answer choice, the question library import ignores the images.

20.3.3.8 Behaviors for Assessments after Exam Publication

Assessments have behaviors that prevent you from making mistakes after you publish an exam.

After you publish an exam, it is available to users to assess their learning. To protect the intent of the test, we impose these rules after you publish:

- You cannot add questions and objectives cannot be added to the exam.
- You can remove existing questions and objectives, provided that all questions and objectives are **not** removed. That is, the exam must have at least one question.
- You can edit question text. New revisions of in-use questions are automatically created and they become available to future exam iterations.
- When you add new answer choices to any question, we automatically create a new version of the question. If the previous version was available, then it continues to be available to exams until the new version is made available.
- In the objective setting *Number of questions to include*, you can update the value provided that *Number of questions to include* is set to a value less than or equal to the number available questions in the objective.
- You can update the objective inclusion rules (*Always*, *Never*, *Randomly*), provided that there are enough available questions in the objective, and that the number of *Always* questions is <= number of available questions in the objective.

> **Note**
>
> Other actions are allowed. For example, you can add questions to a published exam.

20.3.3.9 SAP SuccessFactors Learning Assessments

You can match your needs to the best way to test user learning.

In SAP SuccessFactors Learning, an assessment is a generic term for measuring users' understanding or mastery of content. We offer different kinds of assessments for different purposes. When you choose the right assessment, you can do a better job of measuring users' mastery while doing less work to manage the assessment.

Using Quiz Assessments to Easily Create a Simple Test of Users' Knowledge

We designed quizzes with the simplest possible logic. When you create quizzes, what you see when you create the quiz is what users get. A quiz does **not** includes less complex run time logic. Although it can vary the order of questions and do some light logic, it lacks the ability to handle objectives, question variants, and so on. If you are not taking advantage of learning objectives to test learning outcomes, quizzes can be a good option for you.

As a result of their simplicity, questions are local to the quiz where you create them. If the same question needs to be asked in multiple quizzes, the question must be added and maintained separately in each quiz.

Features of quizzes:

- Multiple question types:
  - True/False
  - Multiple choice - Single Answer and Multiple Answer
  - Drag and drop ordering
  - Fill in the blank (free text)
- Translation support with ability for users to take a quiz in their language of preference
- Import/Export of quizzes and quiz questions

- Feedback to users based on correct/incorrect responses to questions
- Pretest and post-test messages for test takers
- Reporting on quiz results and usage

Using Exam Assessments to Create Powerful Tests of Users' Knowledge

We designed exams to handle more complex evaluations with more complex logic, particularly for users who Exams can use logic to randomize questions, pose variants of questions to test users' knowledge in different ways, self-select questions from a pool of questions for an objective, and so on. The more powerful logic means that each users' exam correctly tests users' knowledge but two individual users can get two different sets of questions. As a designer, you can draw from an independent bank of questions. Exams reference questions but those questions are not directly a part of the exam.

As a result of their flexibility and power, exams require more attention from a designer.

Features of Exams:

- Exams have all quiz features in terms of support for question types, images, translations, feedback, pretest and posttest messages.
- Exam questions are shared among exams. If you create a question in the question library, it can be used in any exam in your system; conversely, exam questions automatically become part of the question library, allowing for centralized question management.
- Questions have revisions to keep up with changing standards. For example, if a governing body changes regulations and you need to keep up with the change, you can revise the question to keep pace. We support reporting at the version level.
- Question variants test the same knowledge in different ways from user to user (to prevent cheating) or in repeated exam attempts by the same user (to eliminate guessing and ensure learning effectiveness). For example, a question can be asked with a true/false question or with a fill in the blank question.
- Objective pools enable testing for specific learning objectives and analyzing learning effectiveness (Kirkpatrick Level 2 Evaluations). For example, you might want to test financial regulations as a whole, but you might also want to know how well users met an ethics objective. This feature, along with variants, enhances the randomization capabilities of exams.

20.4 Question Library

The SAP SuccessFactors Learning question library includes all the questions in your system: questions that you can add to an exam.

You build a question library so that you can measure users' ability to answer specific facts or to address specific learning objectives. Questions are the foundation of good exams.

> **Note**
>
> Exams draw questions from the library but quizzes don't.

Your question library includes all questions in your system. Most companies organize questions by associating them with objectives to create question pools.

20.4.1 Enabling the Question Library

Enable the question library for administrators so that they can build a set of questions that can later be used in exams.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Role Management*.
2. Find the role that should get the permissions to use the question library and open the role.
3. In *Permissions*, assign the permissions that grant the access that you want for the role.

   You can add some or all permissions to the role. You might, for example, want one role to search for and view questions in the library, another to create questions, and a third to export the questions.

   For more complex security setup, including security domain groups, read the security guide.

   - Add Question to Library
   - View Library Question
   - Edit Library Question
   - Delete Library Question
   - Copy Library Question
   - Add Revision to Library Question
   - View Objective Questions from Library
   - Search Library Question
   - Export Data (to export questions). If you want the role to export questions, you must also give the role access to search and view questions because search and view are required to export.

20.4.2 Adding Questions to the Question Library

Add questions to the question library so that you can use them in exams.

Prerequisites

Before you can add questions to the question library, the question library must be enabled.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Question Library*.
2. Click *Add New*.

   The *Create Question* dialog opens.
3. Type a unique question ID in *Question ID*.
4. Select a question type in *Question Type*.

   A question type defines how users answer the question.
5. Assign a default point value for the question in *Points*.
6. Set a default locale for the question.

   The default locale is the source language for the translation.
7. Provide a description about the question.
8. Select a security domain for the question.
9. If you know the objective that the question tests, add the objective in *Objective*.

   When you add objectives to questions, the question is added to the objective question pool.
10. Select *Active* to make the question usable in the system.
11. Choose *Create*.

Next Steps

After the question opens, you can refine it or you can choose *Add Question* to add another or you can add a variant to the question.

20.4.2.1 Answer Randomization

Answer randomization tells exams to present potential answers to users in a random order.

We recommend that you randomize answers because it makes question design easier. When you randomize answers, you don't have to worry about where you place the correct answer because the correct answer can appear anywhere in the list at run time. You can, for example, put all your correct answers first in the list of answers and rely on the exam to mix the correct answer with the other answers. Additionally, when you randomize answers, you reduce the possibility of cheating on exams because users cannot tell each other which choice to make (first, second, third) for any question on the exam.

For example, imagine that you want to write a question that tests learners' knowledge of the solar system. If you type the question stem “Which planet is closest to the sun?” you can type the answers in this order at design time. If you randomize answers, then at run time, Mercury can appear in any position in the list.

1. Mercury
2. Jupiter
3. Earth

Answer randomization works when the order of the answers is changeable, so it applies to multiple choice/multiple answer and multiple choice/single answer question types.

> → Tip
>
> Do **not** randomize Multiple Choice question types if the order of the answers is important. For example, do not randomize if you use an all of the above or none of the above answer.

Related Information

Question Randomization [page 703]
Randomizing Answers for Exams [page 715]

20.4.2.2 Variant Randomization

Variant randomization assures that when an exam selects a question, the exam randomly picks one variant of the question to present to the user.

Variant randomization is built into questions. If you create more than one variant to a question, and the question is pulled for the exam, the exam randomly selects one of the variants and presents it to the user. Variant randomization helps assure that each learner's questions are slightly different from other learner's questions.

Related Information

Question Variant Examples [page 722]

20.4.3 Adding a Variant to a Question

Add variants to a question to add diversity to your questions.

Context

A variant is another way to ask the same question. For example, you can test users' knowledge that they should wear hard hats on building sites by asking "Name the places where hard hats are required" and also asking "True or False: Hard hats are required on building sites." When you add variants to a question, you can introduce variant randomization.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Question Library*.
2. Search for and open the question that you want to add the variant to.
3. Click *Add Variant*.
4. Select a question type.
5. Add the question and answers for the variant.

Next Steps

You can continue to add variants or switch between variants by selecting individual variants from the *Variant* list.

20.4.4 Randomizing Answers for Exams

Randomize answers when you want to the answers (correct and incorrect) placed in random order at run time.

Context

Randomizing answers creates a more secure exam because users cannot predict a pattern to the order. They cannot, for example, know that the first answer in a question is always correct. It also saves you time when you create questions: you don't need to think about where you place the correct answer: the iteration moves it for you.

Randomization is not helpful in some cases. Questions like fill-in-the-blank or true/false do not benefit from randomization. Consider disabling question randomization for questions that use “All of the Above” or “None of the Above” type of answers. If you enable randomization in this case, the “All of the Above” and “None of the Above” distractors can, at run time, have nothing above them.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Question Library*.
2. Search for and open the question that you want to randomize the answers for.
3. Open each variant that you want to randomize the answers for.
4. Select *Randomize Answers*.
5. Click *Save*.

Related Information

Answer Randomization [page 713]

20.4.5 Creating a Fill-in-the-Blank Question

Create fill-in-the-blank questions to require users to type an answer instead of selecting it from among a list.

Context

Fill-in-the-blank questions reduce the ability of users to guess an answer from a set multiple-choice answers, but fill-in-the-blank questions are also more complex, especially if you're translating the questions. When you translate fill-in-the-blank questions, work closely with a translator to define both the question and the potential answers.

Procedure

1. Go to SAP SuccessFactors Learning Administration, go to *Content* > *Question Library* > *Add New.* .
2. Fill out the mandatory fields and in*Question Type*, select *Fill-in-the-Blank*.
3. Choose *Create*.

   The question editor page opens.
4. In the question editor page, choose + *Add Variant* to add a variant.

   If you already have a question and you want to add a fill-in-the-blank variant, open the question and then click *Add Variant*.

   Question Type Uses and Examples [page 720]

   Supported Question Types [page 720]
5. In the *Question* box, type a question and type a double underscore (__) to tell the user where the blank is that they must fill in.

   For example, if you type **`The color of the grass is __.`**, you tell the user that they need to fill in the last word in the sentence.
6. In *Answers*, type a primary answer, which is the answer that you expect most of the time.
7. Click *+ Add Alternate* and add an alternate answer, which is an acceptable answer even if it isn't the one you would expect.

   For example, if you typed **`The color light with the longest visible wavelength visible to the human eye is __.`**, then you can type a primary answer of **`Purple`** and a secondary answer of **`Violet`**. You expect most English speakers to choose the word "Purple"to describe the color, but "Violet" is an acceptable synonym.

> **Note**
>
> It's the alternative answer that can be tricky in translated questions. Languages often have variations of words that express the meaning of the answer Your translator needs to consider these alternative words for the target language.

8. Provide feedback to be displayed.
9. Choose *Save*.

Related Information

Adding Questions to the Question Library [page 712]
Adding a Variant to a Question [page 714]

20.4.6 Modifying Objectives in Existing Questions

If you already created a question, you can still associate it with an objective to add it to a question pool.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Question Library*.
2. Search for and open the question that you want to associate to the objective.
3. Click *Settings*.
4. Select an objective in *Objective*.

Related Information

Adding Questions to the Question Library [page 712]
The Relationship Between Questions and Objectives [page 723]
Objective-Based Question Pools [page 701]

20.4.7 Changing the Point Values of Existing Questions

You can change the point values of questions after you create them to change their default values in exams.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Question Library*.
2. Search for and open the question that needs the new point values.
3. Click *Settings*.
4. Set a new number of points in *Points*.

Related Information

Adding Questions to the Question Library [page 712]
Question Point Values [page 721]

20.4.8 Inactivating and Activating Questions

Inactivate questions when you no longer want to use them or see them in reports. Activate inactive questions to begin using them again.

Context

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.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Question Library*.
2. Search for and open the question that you want to inactivate or activate.
3. Click *Settings*.

4. Select *Active* to activate the question or clear it to inactivate the question.

20.4.9 Previewing Questions

Preview questions to see how they appear at run time.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Question Library*.
2. Find and open the question that you want to preview.
3. Select a variant that you want to preview.
4. Click *Preview*.

20.4.10 Adjusting Point Values of Questions

Adjust the point values of questions when you want to weight questions differently in an exam.

Context

You can weight questions differently by assigning different point values. For example, two questions with a point value of 1 have the same weight as one question with a point value of 2. If a user answers both 1 point answers correctly but the 2 point question incorrectly, the user has effectively earned and lost the same number of points toward passing the exam.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *Content* > *Question Library*.
2. Open the question with the weight that you want to change.
3. Click *Settings*.
4. In *Points*, change the weight of the question.

> → Remember
>
> Points, and weights, are relative to other questions, so be sure that you have a weighting system and that you are following it.

5. Click *Save*.

20.4.11 Question Type Uses and Examples

A well-phrased question is the most important way to accurately target a question at users' knowledge, but you can also use the question type target the question.

Question Type Examples

Question	Understanding of the Set	Question Type
Which of these is a terrestrial planet?	Can the user can identify the whole set of planets that are terrestrial?	Multiple Answer
Which group of planets does Earth belong to?	Can the user put one planet into the correct set of planets?	Single Answer
What is the name for the set of planets that are rocky and closest to the Sun?	Can the user name the set?	Fill in the blank
True or false: Earth is a terrestrial planet.	Can the user identify a single planet as either in or out of the set?	True/False
Place the terrestrial planets in the correct order, starting closest to the Sun.	Can the user order the set correctly?	Ordering

20.4.11.1 Supported Question Types

Select the correct question type to correctly challenge users on their knowledge.

Question Types

Question Type	Description
Single Answer	This is a multiple choice question. Users select one answer from the list of possible answers. Although you can write a question that includes an “all of the above” answer to encompass more than one correct answer, we recommend you use Multiple Answers for situations where more than one answer is correct. Multiple answers give you a better idea of what users **thought** was correct and incorrect.
Multiple Answers	This is a multiple choice question. Users select more than one answer from the list of possible answers. You designate one or more answers to be correct, so you can use multiple answers even when only one answer is correct. This forces users to consider the other answers and lessens users' ability to apply the process of elimination.

Question Type	Description
True or False	Users are shown a statement and asked to decide if the statement is true or false. For the statement, we recommend that you include only the information necessary for the test. That is, if you want to build in distraction, do so through offering users more choices instead of writing complex statements.
Ordering	You present the user with a list of answers and users must place the answers in the right order. Be sure to tell the user where to start or if the list is ascending or descending. For example, you can ask the user to order the first four planets in the solar system, but tell the user that the order starts at the sun and moves out into the solar system. Or ask the user to rank nations by their carbon emissions, but tell the users to start with the highest-emitting nation. You type the answers in the correct order and the quiz randomizes the order at run time. The randomization option doesn't appear in the ordering type because the answers are always randomized.
Fill-in-the-blank	Use fill-in-the-blank to test users knowledge of an answer in context. Users see a statement and see a blank space in the statement where a word or phrase is missing. They type the missing word or phrase. In fill-in-the-blank questions, you can give the user alternative answers. Give the user alternative answers when spelling can differ (gray vs gray, for example) or when you don't want to penalize users for a typo (its vs its, for example). You can also use alternative answers when more than one term is acceptable (U.N. vs United Nations, for example). You don't need alternative answers for capitalization because the answer evaluation is **not** case sensitive: the exam accepts both "Earth" and "earth" as a correct answer. ⚠ Caution Fill-in-the-blank questions can be more difficult than other question types to translate because you insert a translator between the quiz creator and the user. Work closely with translators for fill-in-the-blank question answers. ⓘ Note All locales must have the same number of alternate answers.

20.4.12 Question Point Values

Question point values weight the relative importance of each question on an exam.

Not all questions on an exam are equally important. For example, in an exam about standard operating procedure, heath and safety questions might be more important than questions about quality. To make questions more or less important, you assign point values. A question with a point value of two is twice as important as a question with a point value of one. When exams are scored, the point value is a factor in grading.

You can assign default point values to a question when you create it. If you assign the question to an objective, you can assign a different point value when you add the objective to an exam.

20.4.13 Question Variant Examples

In SAP SuccessFactors Learning, question variants are different ways to ask questions to test users' knowledge of a single fact or idea.

When you create questions in the question bank, each question has at least one variant but can also have multiple variants. These examples illustrate variants and how they can be used.

Testing the Safety Equipment in a Laboratory

Imagine that you want to test users' ability to identify the safety equipment in a lab: eye goggles, safety aprons, and surgical gloves. You can create two different variants to test the knowledge:

You could structure the first variant as follows:

- Stem: What safety equipment do you need to walk into a laboratory?
- Type: Multiple Answer/Multiple Choice
- Distractors: Goggles, Protective Shoes, Safety Apron, Surgical Gloves, Air Mask

You could structure the second variant as follows:

- Stem: Which of the following is a required piece of safety equipment for a laboratory?
- Type: Single Answer/Multiple Choice
- Distractors: Protective Shoes, Goggles, Air Mask

Users can be randomly assigned the first or second variant when they sit for the exam, but both make sure that the user can identify proper safety equipment for a lab.

Testing the Safety Equipment on a Construction Site

Imagine that you want to test users' ability to identify the safety equipment necessary on the construction site: hard hat, protective shoes, and goggles.

You could structure the first variant as follows:

- Stem: If you are not part of the construction crew itself, you do not need to wear a hard hat.
- Type: True/False
- Distractors: True and False

You could structure the second variant as follows:

- Stem: The only required safety equipment for a construction site is a hard hat and goggles.
- Type: True/False

- Distractors: True and False

20.4.14 Question Versioning

Question versioning is automatic: if there are user responses to the question, and you revise it, your revision is saved to a new version.

When you revise a question variant, you can keep the lower revision active (and therefore available to exams) while you edit the higher, inactive revision. When you finish your editing the higher version and you are ready to release the higher revision, you activate it. The system automatically exchanges the lower revision (now inactive) with the higher, active revision.

20.4.15 The Relationship Between Questions and Objectives

When you create a relationship between questions and objectives, you create a way to test learners' on their learning objectives.

A learning objective is a measurable learning goal. You can align content objects, content packages, and items to objectives. When you do, you indicate that the content or the learning item should help users meet an objective. When you also associate questions with objectives, you indicate that the questions measure users' **actual ability** to meet the objective.

More practically, when you take the extra step to associate questions with objectives, you can create adaptive exams and question pools because you're no longer measuring learners' ability to answer a question but instead their ability to meet an objective.

- Adaptive exams depend on objectives because when learners pass an objective, they can skip the content object that addresses the objective. Adaptive exams therefore depend on questions in an objective as the measurement tool. If a learner can answer the objective's questions correctly, the learner passes the objective.
- Question pools depend on objectives because when the exam draws from a pool, it draws the questions that measure learners against an objective. For example, if an exam needs a set of questions to measure learners' knowledge of safety equipment, the exam draws random questions from the pool that meet the safety equipment objective.

Related Information

Modifying Objectives in Existing Questions [page 717]
Question Randomization [page 703]

20.5 Questions

View this section if you want to know about content questions.

The Questions section (*Content* > *Question Library*) is the workspace for the Question Editor. Questions are the basic building blocks of exams. Questions seek to test the basic understanding of one particular concept. To answer a question successfully, users must correctly answer one of the question's variants.

To successfully use questions, you should understand the following concepts:

- Questions have one or more variant.
- Variants are composed of a stem, distractors, and supporting content.
- Variants have a type.
- Questions have a point value.

> **Note**
>
> External Questions behave differently than the internal questions.

Questions and Their Variants

Every question has at least one variant, and each question usually has multiple variants. A variant is a different way to ask the same question or to test the same underlying understanding. You can think of variants as two different ways that ask the same question.

All the work of a question and the design of a question is done on the variant level. So to understand the parts of a question the question type and the point value, you must understand variants. For an explanation of variants and an example of variants, see Variant Usage.

The Parts of a Question Variant

Every variant of a question has the following parts:

- Stem: The question stem is the text area that first appears when you create a new variant. The stem appears in reports and in the search results page of the Question area. It's also the place where you should write the question itself or the command to the user. For example, if you want users to read a story and identify the safety risks, you could put the story in another text box but keep the question stem as: "Identify the safety risks in the story below."
- Distractors: Distractors are possible answers to the question, including the correct answer. Depending on the question type, you can have different amounts of questions that behave differently. To make a distractor a correct answer, select its control (option button or check box).
- Supporting Content: Supporting content is any content that the end user needs to correctly use the question's variant.

Question Types

Question types determine how users select answers and what answers are possible in a question variant. The Question Editor supports the following question types:

- True/False: The user can select one of two distractors: True or False.
- Multiple Choice/Single Answer: The user can select one of multiple distractors.
- Multiple Choice/Multiple Answer: The user can select one or more of multiple distractors. Multiple answer questions are either 100% right or 100% wrong. Users don't receive partial credit. For example, if a multiple answer question has two correct answers and users pick one of the two correct answers, they receive no points for the question. If users pick both correct answers, they receive all the points for the points.
- External Question: External Questions are a record that corresponds to questions that are served from a URL outside SuccessFactors Learning Administration.

Hard-Selected Questions

Hard-selected questions are ones that you hard-code into an exam to make sure that they appear. When you hard-select, you choose a particular variant of the question in the *Questions* tab of the Exam. Hard-selected question variants always appear on the exam.

20.5.1 Question Editor

View this section if you want to know about the Question Editor.

The Question Editor is located in the Questions section (*Content* > *Question Library*). It manages the questions that go into exams. Use the Question Editor to create questions and variants that you want to present to users during an exam. To use the Question Editor, you need to understand questions, exams, and objectives.

The Question Editor has four sections, each of which has its own controls:

- The Workspace - Contains the questions you design, including each of the variants to the question.
- Question Metadata - Contains information about the question to help you, as a designer, find and understand the questions.
- Objective Information - Contains the objective that the question is associated with. Objectives are one way to pool questions.
- Variant Usage - Contains a map of exams where the variant is used.

20.5.1.1 Variant List

View this section if you want to know about the Variant list in the Question Editor.

The Question Editor Variant list contains all variants of a question. Variants are each a different way to ask a question, like different word problems that ask the same underlying arithmetic problem. Click *Expand* to see all variants of the question. The variant list contains some critical information about the variants:

This field...	...Is Used as Follows
Variant Status Icon	The Variant Status icon changes depending on what you can do with the variant. If you can delete the variant, the *Delete Variant* button appears. If it is part of an exam (and therefore cannot be deleted), the *Exam* button appears.
Variant	The unique ID of the variant. Each variant has a unique ID that is assigned sequentially as you add variants. It is a system ID that is relevant to keeping the variants distinct.
Revision	As you revise the variant, the revision number increases. Higher revisions have been saved more often.
Type	The type of answers that can be given to the question.
Question Settings	Settings that control the behavior and scoring of the question. To understand the settings, see About Questions.
Active	Select to make the variant revision active. Only one variant revision can be active at a time. To learn more about active revisions, see Active Revisions.

20.5.1.2 Questions Palette

View this section if you want to know about the Questions Palette in the Question Editor.

The questions palette contains all the questions that you want to work with. You can click the different questions in the palette to open the question (and its variants) in the workspace.

Function	...Is Used as Follows
Open All/*Close All* links	Use the *Open All* and *Close All* links to expand all the questions to see all their variants or collapse all the questions to hide their variants.

Function	...Is Used as Follows
Question Type Codes	Each variant's question type is represented by a code: • T/F: True/False • MCSA: Multiple Choice, Single Answer • MCMA: Multiple Choice, Multiple Answer
Save Button	The *Save* button saves the questions.
Remove Changes Button	The *Remove Changes* button reverts the changes since the last time you saved.

20.5.1.3 Actions Menu

View this section if you want to know about the Actions menu in the Question Editor.

The Question Editor Actions menu contains some commands that duplicate toolbar commands, but some commands can only be found in the menu.

Action	...Is Used as Follows
Add Distractor	Adds a distractor, which is a possible answer. The behavior of the command depends on the type of question you select.
Delete Distractor	Deletes the selected distractor, which is a possible answer.
Clean Up Question	Resets the question objects to their default positions: aligned to the left with distractors under the question stem.
Edit Image	Enables you to edit an image.
Preview Variant	Opens a preview of the question to give you a rough idea of how it looks in a runtime exam.
Add New Variant	Adds a new variant to the question. You can only add variants once you have saved the first variant.
Revise Variant	Creates a new revision of the active variant (the one selected in the variant list). Variants can have multiple revisions, but only one active revision. To set the active revision, select its *Active* check box in the variant list.
Delete Variant	Deletes the variant that is currently selected in the variants area and that appears in the workspace. If a question has only one variant, you cannot delete it.

Action	...Is Used as Follows
Copy Question	Copies the question and all its variants. You must give the new question a unique name. Copying questions is a useful way to copy objectives and question metadata into a new question, but if you want to ask the same question in a different way, consider adding a new variant.
Reset to Last Saved	Reverts your work on the variant to the last time you saved.

20.5.1.4 Question Metadata

View this section if you want to know about the Question Metadata area in the Question Editor.

The Question Metadata area allows you to change the general information about the question, including the question name itself.

This field...	...Is Used as Follows
Question Name	The name and unique ID of the question.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. A security domain is an attribute of some SuccessFactors Learning Administration entities (but not all entities have security domains). Your role determines which security domains you can access. What an administrator can access and do for an entity depends on how you configured the permission restrictions of the role ID that is associated with the administrator. For more information about how you can configure access to entities, see *System Administration* > *Security*.
Description	Question descriptions appear only to administrators. Use them to communicate with other administrators about the purpose of the question and different variants.
Keywords	Keywords are a search field when you or other administrators are looking for questions. You can, for example add the keyword MATH to any math questions you ask. When you search for questions with MATH in the keywords field, then you retrieve all the math questions.

This field...	...Is Used as Follows
Custom Fields	You can use custom fields to assign a value for any custom fields (*System Administration* > *Custom Fields*) that were added for this entity type. If the custom field accepts only referenced values, then you can select one of those values from the associated list; otherwise, you can enter any value up to 40 alphanumeric or special characters in the associated box. A custom field is referenced when the value of the custom field can be selected only from a limited set of options that an administrator defines. For example, you can use custom fields to identify the skill that the question is meant to test.
External Question Fields	External questions behave differently than questions you create in PQE. Each of the following fields is supplied by the content server that serves the external question. • URL: The URL that accesses the question. • Content Server Wrapper URL: The URL to the content server. • Communication Proxy URL: The URL for the communication proxy. • Allow Cross Domain Communication: To allow cross-domain communication between the domain where the application runs and the domain where the content server runs, cross-domain support must be enabled in the LMS_ADMIN configuration. To learn more about cross domain communication, see the System Configuration Guide.

20.5.1.5 Objective Information

View this section if you want to know about the Objective Information section in the Question Editor.

Associating questions with objectives is a way to make exams adapt to user's answers. To learn more about the relationship between objectives, questions, and exams, see Question - Objective Relationship.

This field...	...Is Used as Follows
Objective Name	The name of the objective.
Domain	The domain of the objective. Domains control security; administrators have access to only some domains.
Active	If the domain is inactive, it is not useful to adaptive exams.

This field...	...Is Used as Follows
Online	Under normal conditions, objectives are online. When an objective is not online, users are locked out of any online material that incorporates the objective. In the event an objective's related content is discovered to be flawed or misleading, taking an objective offline prevents users from incorrect associations or materials. The Online setting is controlled in the Objectives area.

20.5.1.6 Variant Usage

View this section if you want to know about variant usage.

The Variant Usage section tells you the exams that use variants of the question.

This field...	...Is Used as Follows
Variant	The unique ID of the variant. To see another variant of the question, select it in the variant list.
Revision	The current revision of the variant.
Stem	The place where you write the question.
Exam Name	The name of the exam that uses the variant.
Active	Whether the exam is active or not. Inactive exams are not in use but are saved in system in case your organization decides it wants to use it later.
Presented	Denotes a required question.
Variant Usage by User	Lists the usage for: • Number of Exams • Users who Took Exams • Answered Variant • Answered Correctly

Related Information

Variant List [page 726]

20.5.1.7 Exams

View this section if you want to know about exams.

Exams are groups of questions that you can associate with Learning Items. Although every item is a group of questions, you can create sophisticated behavior by changing the settings of the exam and the method you use to associate questions with the exam. You can use the following kinds of exams, which can be combined to design the exact type of exam you want to present to the user (for example, a sequential, timed, and adaptive exam). To understand behavior, you also need to understand How Questions are Selected for Exams, Question Behavior, and Exam Point Values.

- Timed Exam: Users must complete the online exam in the time allotted.
- Sequenced Exam: Users must answer questions in the order they are presented.
- Feedback Exam: Users see feedback during or after an online exam.
- Printed Exam: Users who do not have access to computers for the exam take a unique printed exam, and their scores can be input later. By default, exams are online.
- Adaptive Exam: Users take online pre-tests or post-tests and the online learning item associated with the exam adapts to the user's success or failure in an objective: users skip or finish objectives they pass and take or repeat objectives they fail.
- Surveys: Users are asked questions to find their opinions on subjects. Surveys are not scored.

20.5.1.7.1 Timed Exam

View this section if you want to know about a timed exam.

A timed exam requires users to finish an exam in an allotted time. The timed exam is available in online exams. By specifying a duration on the exam Summary tab, you make the exam a timed exam. The following rules apply to a timed exam:

- If the exam is timed and displays feedback (*Content* > *Exams* > *Summary* > *Feedback*), the time it takes for the system to display feedback is counted against the duration.
- If the exam is timed, the time to load a question in the browser is not counted against the duration. For example, if the user has a dial-up connection and the questions have many images associated with them, the time it takes to download the images do not count against the user.
- If the exam is timed, then the exam cannot be resumable (the *Content* > *Exams* > *Summary* > *User can stop and resume exam before it is scored (non-timed exams only)* check box must be clear).
- If the exam is timed, the system grades the exam when the user is finished answering the questions or the duration runs out (whichever is first).

At run time, a timed exam behaves in the following ways:

- Users see a count-down clock that shows them the time they have left in the exam.
- When a user runs out of time during an exam, the user sees a message that time has expired and that the exam will be graded.
- When time expires on a user, the exam is graded immediately.
- After an exam is graded, the user sees his or her grade.

After exams are complete, the system stores the actual time that each user took to finish the exam. The actual time appears in the following places:

- The user's learning history
- The administrator's Object Details page of the Users section
- The details section of some learning reports

20.5.1.7.2 Sequenced Exam

View this section if you want to know about a sequenced exam.

Exams always have a sequence setting. They're either sequential or non-sequential (free-form).

- Sequential presentation exam: Users must answer each question when it's presented before they can move on to the next question. Users can't review questions they have already answered until the exam is scored. You can prevent users from any review by clearing the *Reviewable Exam* check box. Users must finish the entire sequence before receiving any feedback. Users receive feedback according to the rules you set in the Feedback options.
- Free-form movement exam: Users can skip questions and move backward and forward through the exam regardless of whether or not they answer questions. The user receives no feedback after individual questions are answered. Instead, users receive feedback when they click the *Grade Exam* button to indicate they've finished the exam and the exam is scored. Until that point, users can change answers any number of times for any question.

20.5.1.7.3 Feedback Exam

View this section if you want to know about a feedback exam.

All exams must have a feedback setting (in the *Summary*). You can set the exam to provide feedback in one of the following ways. If your exam is also timed, then remember that the time it takes to show feedback is counted against the user's allotted time.

- Show only correct Feedback: Shows feedback to user only when they answer the question correctly.
- Show only incorrect Feedback Shows feedback to users when they answer the question incorrectly.
- Show both correct and incorrect Feedback: Shows feedback to the user whether they answer the question correctly or not.
- Don't show any Feedback: Does not show feedback, even if the questions have feedback settings.

20.5.1.7.4 Printed Exam

View this section if you want to know about a printed exam.

By default, exams are online, but you can also create a printed exam. A printed exam is a useful way to present exams to users who have no access to computers for the exam. You can still record scores for a printed exam. After users take the exam on paper, you or another administrator can collect their exams and record their scores. To use a printed exam, you issue and score it.

20.5.1.7.5 Adaptive Exam

View this section if you want to know about an adaptive exam.

An adaptive exam adapts the online content of a learning item based on a user's success or failure in an online exam. The adaptive exam works by using objectives as a bridge between questions and content. Users pass or fail objectives, and based on the content objects that are associated with the objectives, they pass or fail the content object.

To learn how to create an adaptive exam, see Building Exams.

An adaptive exam takes two forms, pre-tests and post-tests:

- Adaptive Learning Pre-tests: Users take exams before other content to assess their existing knowledge. If users pass all the objectives associated with a content object the content object is marked complete. The learning item only presents incomplete content objects to users, so they skip content that they've already mastered in order to concentrate on what they must learn.
- Remediation Post-tests: Users take exams after they complete a learning item's other content objects. The post-test assesses mastery of the content object's learning objectives. When users fail one or more objectives associated with a content object, the content object is no longer marked complete. Users must review the incomplete content (content that they have not mastered).

An adaptive exam relies on flags, which are set during exam analysis. During the exam, users answer questions that are associated with an objective. If they correctly answer enough questions from the objective to receive a passing grade, then they receive a flag for the objective. When a user has a flag for all objectives in a content object (or package, or item), users can:

- Skip content objects (in the case of a pre-test).
- Avoid reviewing content objects (in the case of a post-test).

Users aren't forced to skip or review content. Instead, if they fail an objective, they receive a Needs Review flag on the associated object. In their Content Structure page, every object that has a Needs Review flag contains the sentence "This content object needs to be reviewed" in the Status column. You can remove the flag in the Object Details page of the User's Learning Plan.

Objectives are the connection between questions, content, and flags, so you should create your objectives carefully. Once you have set up objectives, associate them with both content that fulfills the objectives and questions that measure proficiency in the content.

Related Information

Building Exams with the Legacy Exam Tool [page 743]
Viewing a User's Assigned Learning Items (Courses) [page 610]
Learning Assignment Methods that do not Rely on Assignment Profiles [page 402]
Learning Objectives [page 439]

20.5.1.7.6 Survey

View this section if you want to know about an exam survey.

If you select the *Is survey* check box, the exam is a survey. Scores does not count against the user's record. If you also select the *Analyze the exam results* check box, then the Scores page, which users normally see after finishing the exam, does not appear.

> **Note**
>
> Question Editor surveys are one way to conduct a survey in Talent Management. You can also use Questionnaire Surveys.

- In surveys, users do not see the Scores page. The Scores page summarizes their performance after they have answered all the questions and indicated they are finished.
- In surveys, users do not receive any feedback after answering a question.
- The completion of a survey, unlike the completion of an exam, does not result in any scoring data reflected in the User Item Object Details module.

Related Information

Adding Surveys to Evaluate Courses or Learners [page 102]

20.5.1.8 Exam Scoring

When SAP SuccessFactors Learning scores exams, it grades with point weight, exam timers, and full credit.

Online exams are graded immediately by the system. Printed exams are graded when an administrator completes the grading wizard for the exam. When exams are graded, the exam accounts for the points assigned to each question or objective. Points provide a way to assign relative weights to run time questions.

The grading system follows these rules:

- Point values are distributed as described in Exam Point Values.
- Questions are normalized to their point values: **(Total points for correct questions * 100) / Total points for all questions) = Weighted score**.
- If an exam is timed, and the user does not complete the exam in the time allotted, the unfinished questions are incorrect.
- Partial credit does not exist. The user either receives all points for the question or no points for the question.

Related Information

How SAP SuccessFactors Learning Assigns Point Values at Run Time [page 735]

How Points are Assigned when an Exam Mixes Directly-Selected Questions and Question Pools with Matching Objectives [page 735]

20.5.1.8.1 How SAP SuccessFactors Learning Assigns Point Values at Run Time

Points are assigned to questions in exams one way for directly assigned questions and a different way for questions from objective pools.

Exams can draw their questions, at run time, from question pools or from directly assigned questions. Question pools are a set of questions that address an objective. In most cases, the directly assigned questions either don't have an objective or their objective is different from the one in the pool. For example, an exam might have a few directly selected questions that are general background questions, assigned to no objective, and then questions pulled out of an objective pool.

If this is the case, then points are assigned as follows:

- Points assigned to a directly-selected question are face value: if you type 5 in the Points column, the question is worth 5 points. The points that appear in the Points column are inherited from the points assigned in the variant list.
- Points assigned to an objective pool are divided equally among the questions in an objective. If an objective pool has five points assigned to it, and at run time, five questions are selected from the pool, then each of the five questions has a point value of one.

If, however, you have questions that are directly assigned and their objective matches the objective in one of the pools, the rules become more complex. If you have matching objectives in question pools and directly assigned questions, you have another set of rules.

Related Information

How Points are Assigned when an Exam Mixes Directly-Selected Questions and Question Pools with Matching Objectives [page 735]

20.5.1.8.2 How Points are Assigned when an Exam Mixes Directly-Selected Questions and Question Pools with Matching Objectives

If you create an exam that mixes questions that you assigned directly with question from a question pool, you should understand how SAP SuccessFactors Learning assigns points to score the exam.

Points that are assigned to an objective pool are separate from points that are assigned to hard-selected questions, even when the hard-selected question shares an objective with the objective pool. The hard-selected question still

applies to the objective (for purposes of an adaptive exam), but its points are its own. To tally all points for the objective, you use the formula:

Sum of all Hard-Selected Question Points + Objective Pool Points = Total Points for Objective

For example, if you add the following objects to the Questions tab, each worth the following points, your total points for Objective A is 20:

- An objective pool that draws its questions from Objective A. The pool is worth 10 points.
- Two hard-selected questions, also associated with Objective A. Each question is worth 5 points.

The example assures that the two hard-selected questions, in the variants you choose, will always appear on the exam. You also specify (through the Minimum Questions and Maximum Questions columns) a range of questions that must appear from the pool If you specify that a minimum of 2 and a maximum of 5 questions, must come from the pool, those questions (be they two questions, five questions, or in between) share the 10 points for the pool. The two questions you hard-select are removed from the pool. They are not among the 2-5 questions selected from the pool.

If the pool is worth 10 points, and you specify a minimum and maximum range of 2 and 5 questions, then the specific point value of each run time question from the pool can vary. If the exam uses the maximum number of questions from the pool (5), each question shares 2 points. If the minimum number of questions appears from the pool (2), each question shares 5 points. You can express the way pools distribute their points as follows:

Points Assigned to the Pool / Questions Selected at Run Time from the Pool = Points per Question From the Pool

Related Information

How SAP SuccessFactors Learning Assigns Point Values at Run Time [page 735]

20.5.1.9 Legacy Question Editor Activities

You can do these things in the legacy question editor.

- Add a new question or open an existing question.
- Edit the question by editing its variants.
- Change the question behavior, which is how it appears and interacts with the user at run time.
- Organize the question to make it easier to find and manage.
- Revise the question, under change control. After you create questions, you add them to exams. Much of the runtime logic occurs in the exam logic, so it helps to understand how exams work.
  - Create an exam or find the existing exam that receives the questions and then add questions to it.
  - Add the exam to an item so that it has a container and can be assigned to users.
  - Print the exam (optional). Printed exams are useful for classroom-based items or users who do not have access to a computer. Printed exams also require an extra step of recording the scores of the exam. Usually, you develop the exam and exam questions in a development or a test environment and not in your production environment. The Import/Export assistant migrates your questions from a development environment to a production environment.

20.5.1.9.1 Adding a New Question in the Legacy Question Editor

View this section if you want to know about adding a new question in the Legacy Question Editor.

The basic unit of the Question Editor is the question. To add new questions to the system, navigate to the questions area, and then click the *Add New* link. The *Add New Question* dialog box appears. Complete the fields in the *Add New* dialog box and then click *Add*.

- The *Question Name* box must contain a unique string of characters because the question name is also the unique ID of the question.
- Although questions are not required to have objective, assigning an objective has advantages. You can associate and objective with the question later, in the question's Objective area.
- You can change the question type later.

Every question has at least one variant. When you add a new question, the Question Editor creates the first variant for you, and it appears in the workspace.

20.5.1.9.2 Opening an Existing Question in the Legacy Question Editor

View this section if you want to know about opening an existing question in the legacy question editor.

When you open an existing question, you use the search page in the Questions section. The following search tips, which are unique to the Question Editor, can be helpful:

- Use the *Keywords* box to find questions based on their metadata. Keywords are like tags. For example, if you have many legal questions, you can add a "legal" keyword in the metadata section. Type "legal" into the *Keywords* box to find all questions tagged as "legal."
- The *Description* field contains any comments by question authors. It does not contain keywords.
- You can select an objective in the *Objective* column. If you select the *Objective* check box, you open all questions that belong to that objective in the question palette. Once you have loaded questions into the question palette, you can switch among the questions without searching again.
- You can select multiple questions or multiple objectives to load all those questions in the question palette.
- In the results of your search, questions with a yellow background are associated with objectives. Questions with a blue background are not associated with objectives.
- You can click *Expand* to see more information, including variant information.

Related Information

Questions Palette [page 726]

20.5.1.9.3 Editing a Question in the Legacy Question Editor

View this section if you want to know about editing a question in the legacy question editor.

Before you can edit a question, you must create a question or open an existing question.

You can change the appearance and content of a variant objects. The objects appear in the Question Editor workspace, which is like a word processor:

- To add text to an object, double-click in the object and type.
- To change the appearance of text in an object, select the text and then use buttons in the toolbar to change it.
- To change the size of an object, drag the sizing handle.
- To move an object, click and drag it.

Related Information

Adding a New Question in the Legacy Question Editor [page 737]
Opening an Existing Question in the Legacy Question Editor [page 737]
Question Editor [page 725]

20.5.1.9.3.1 Advanced Question Editing

View this section if you want to know about advanced question editing.

Before using the advanced editing features, you must create a question or open an existing question.

Advanced editing adds or changes objects on the screen. Advanced editing can also change the behavior of the question or variant. When adding or manipulating objects, consider the following:

- When you add an image, optimize the image for the users' connection speed before you include it in a question.
- Use additional text boxes for supporting text, not for the text of the question itself. The text box that appears when you first create a variant is the question stem, which appears elsewhere in the administration environment to help you identify the question and variant.
- You can use screen resolution guides by clicking the *Set Resolution* button. The guides show you the number of pixels that are available on your users' computers. If you keep objects inside the box, then your objects fit in the users' screens at run time. Remember that some of their screen is occupied by their browser's user interface.
- When you arrange objects in the workspace, think about whether the question is part of a printed exam.
- You can delete a question through the Actions menu, but if either the question or one of its variants is associated with any exam, you can't delete it.
- You can delete a variant by choosing *Actions* > *Delete Variant* button, which is in the variant list. If the Exam symbol appears, you can't delete the variant because it's associated with an exam. To see the exams using the variant, check the Variant Usage list.

Related Information

Adding a New Question in the Legacy Question Editor [page 737]
Opening an Existing Question in the Legacy Question Editor [page 737]
Variant Usage [page 730]

20.5.1.9.3.2 Changing Question Behavior

View this section if you want to know about changing question behavior.

You can change the appearance of a question with basic and advanced editing, but you can also change the behavior of a question through the Question Editor workspace. The behavior you can affect, however, is limited because many rules are defined in exams.

- To indicate the correct answer (or answers) to a variant, select them.
- Adding variants to a question increases the number of ways you can present, or ask, the same question. You can add a variant from the Actions menu.
- Randomizing the distractors randomly changes the order of distractors at run time. To randomize, select the *Randomize* check box in the Variant List.
- Changing the point value assigns a weight to the question relative to others, which affects the way the exam is graded. Point values are most useful when you assign questions to objectives. All variants of a question have the same point value. You can change the point value in the Variant List.
- Assigning a question to an objective creates question pools. At run time, an exam can dynamically select questions from the pool. Assigning questions to objectives also allows you to create adaptive exams.

Related Information

Question Variant Examples [page 722]
Actions Menu [page 727]
Variant List [page 726]
Adaptive Exam [page 733]

20.5.1.9.3.3 Organizing Questions

View this section if you want to know about organizing questions.

You can use metadata to organize your questions. For example, if you have many legal questions, you can add a "legal" keyword to help you find appropriate questions when you come back to open existing questions. Add metadata to the Question Metadata section.

> **Note**
>
> We do **not** recommend that you use objectives as tags. Grouping questions by objective creates question pools and is a prerequisite of creating adaptive exams.

Related Information

Question Metadata [page 728]

20.5.1.9.3.4 Question Editing Tips

View this section if you want to know about question editing tips.

When you work in the Question Editor workspace, there are shortcuts and tricks:

- To expand all variants of a question, click the *Expand* button in the Variant List. You can then switch to the variant you want to edit by clicking it.
- You can load questions in to the Question Palette by selecting multiple question in the Questions' Search page. Once the questions are loaded into the palette, you do not need to search again to open a new question. Click it (or its variant) to open it in the workspace.
- You can reset the variant to the last saved version in the Actions menu.

Related Information

Questions Palette [page 726]
Actions Menu [page 727]

20.5.1.9.4 Legacy Question Editor Change Control

To assure that your exams change deliberately, we built change control into the legacy question editor.

After you add a question variant to an exam, it becomes subject to change control: you cannot change it directly. The Question Editor uses change control because if you were able to change questions and variants on the fly, you could adversely affect users who have exams open and reports on the question.

To change a question variant that is under change control, you create a new, inactive revision of the question, change it, and then promote it to the active revision. The revision feature means that the Question Editor maintains a record of past revisions, current revisions, and when you made the change, and it is central to the change control. You can create new revisions in one of the following ways, depending on how many changes you need to make:

- If you only need to touch up a few questions (or if you do not have a development environment) you can revise questions directly in the production environment.

- If you have many questions to revise (and you have a development environment) you can use the Question Import/Export Assistant to handle the revisions.

Related Information

Question Variant Examples [page 722]
Migration of Questions Between Environments When Using Legacy Questions [page 748]

20.5.1.9.4.1 Creating New Revisions in a Production Environment with the Legacy Question Editor

View this section if you want to know how to create new revisions in the production environment for the legacy question editor.

Context

Exams only use the active revision of a variant. Because only active revisions of a variant appear on exams, you can edit an inactive revision without affecting exams that use the question. Once you have finished editing the question, you promote your inactive revision to the active revision. From that point forward, run-time exams use the new, active revision.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Content* > *Questions (Legacy)*.
2. Select a question with a variant that you want to revise.

   > → Tip
   >
   > You can identify active variants by their status icon in the variant list.

3. Click the *Actions* menu and then click *Revise Variant*.
4. Choose *Add* to revise the variant.
5. Edit the variant.

   > ⓘ Note
   >
   > The inactive revision of the variant isn't connected to exams, so users don't see your changes until you promote the revision to the active revision.

6. When you have finished editing the inactive variant, select its *Available for Exams* check box.

New run-time exams created when users launch the exam from *Online Content*, use the new active revision.

7. Choose *Activate* to push the revised variant to any exams that use it.
8. Choose *Save*.

Related Information

Variant List [page 726]
Editing a Question in the Legacy Question Editor [page 738]

20.5.1.9.4.2 Creating New Revisions with a Development Environment in the Legacy Question Editor

View this section if you want to know how to create new revisions with a development environment in the legacy question editor.

Context

You can revise questions in a development environment and then promote them into your production environment using the Question Import/Export Assistant. When you import, the assistant handles the logic that creates active revisions of your questions.

Procedure

1. Export questions out of your production environment and import them into your development environment with the Question Import/Export Assistant.
2. In the development environment, revise the variants of the questions and activate all the variants that you want to promote in the production environment. You revise variants in the development environment in the same way you would in a production environment.
3. Export the questions out of the development environment and import them into the production environment. The rules in the Import/Export Assistant automatically handle the promotion and activation of the new revisions.

Related Information

Migration of Questions Between Environments When Using Legacy Questions [page 748]
Question Variant Examples [page 722]

20.5.1.9.5 Building Exams with the Legacy Exam Tool

View this section if you want to know about building exams in the legacy exam tool.

When you have finished adding and editing questions, you can add the questions to an exam in the Exam Objects page. Before you begin, consider the kind of exam you want to build:

- Simple online exams are online exams in their simplest form. You control multiple settings that define the behavior of the exam, but the exam is **not** adaptive.
- Printed Exams can be completed offline. You enter users' answers after they give the completed exams back to you.
- Adaptive Exams affect the content that users must take and that they can skip.

After you decide the kind of exam you want to create and the settings you want for your exam, navigate to the Exams page.

> **Note**
>
> Once questions are a part of an exam, they fall under change control: you cannot directly revise a question that is attached to an exam.

20.5.1.9.5.1 Creating a Simple Online Exam with the Legacy Exam Tool

View this section if you want to know how to create a simple online exam.

Context

Simple exams are online and although they aren't adaptive, they test users' knowledge. They're graded and can contain run-time behavior that affects the user's interaction.

Consider building a quiz instead of an exam. Go to *Content* > *Quizzes*.

Procedure

1. In the Exam Objects section, open the exam you want to edit or create a new exam. Complete the required fields.
2. Decide how you want the exam to behave, based on the information in About Exams.
3. Don't select Survey.
4. Decide the pass percentage necessary for users to pass the exam for grading purposes. Also decide the number of attempts users can make before the system locks them out of the exam an administrator must reset their access.

5. Choose the *Add* button. The exam record is added to the system and opens.
6. Choose the *Questions* tab to bring it to the top, and then decide how you want to add questions.
7. Choose *Apply Changes* to save your changes.
8. Choose the *Preview* button to view the exam as it appears at run time.
9. Associate the exam with a learning item (*Learning Activities* > *Items* > *Online Content tab*) so that it can be assigned to users.

> **Note**
>
> Exam records can't be downloaded to Plateau Offline.

Related Information

Legacy SAP SuccessFactors Learning Exams [page 752]
Exams [page 731]
Legacy SAP SuccessFactors Learning Exam Questions Tab [page 763]

20.5.1.9.5.2 Creating Printed Exams and Grading Them with the Legacy Exam Tool

View this section if you want to know how to create printed exams and grade them.

Context

Printed exams can be completed offline. You enter users' answers after they give the completed exams back to you.

Procedure

1. Create a simple exam or use one that already exists. The online settings, like feedback and sequence, don't have any meaning in a printed exam, but you can still set them. Setting them allows you to use the exam in two ways: printed or online. The settings take effect only when the exam is administered online.
2. Go to the *Printed Exams* tab in *Exam Objects (Legacy)*.
3. Type the number of unique exams you want to print. Because questions can be selected randomly, and distracters can be randomly ordered, you can print fewer unique exams than you want to pass out to users. For example, if you plan to distribute the exam to 25 users but you only want to print five unique exams, you can print five and make four more copies of each exam.
4. Choose *Generate Printed Exams* to print unique exam templates.

   The number of exams you decide to print appear in a table.

5. Select the *Print* check box and then choose the *Print Exam* button to print them.

> → Remember
>
> Note the sequence ID on the exam. It corresponds to the *Exam Sequence ID* on the *Printed Exams* tab. Using the *Exam Sequence ID*. You can reprint the unique exams at any time if, for example, a user misplaces the exam.

6. If you want, you can also get a print of the answer keys by choosing *Print Answer Key*.
7. Distribute the exams to users.

> ⓘ Note
>
> Users must be assigned an item that requires the exam, and they must provide their user ID when they turn the exam in.

8. To grade the exam, choose *Score* in the *Record Scores* column of *Printed Exams*.
9. Complete the grading wizard by providing the *User ID* and the *Exam Sequence ID*.
10. Choose *Finish*.

Related Information

Legacy SAP SuccessFactors Learning Exam Printed Exams Tab [page 766]
Legacy SAP SuccessFactors Learning Exams [page 752]

20.5.1.9.5.3 Creating an Adaptive Exam with the Legacy Exam Tool

View this section if you want to know how to create an adaptive exam.

Context

Adaptive Exams automatically change the content of an item based on a user's performance on the exam.

Procedure

1. Create objectives to describe the knowledge you want users to possess. Objectives are testable outcomes of the content in a learning item. For example, if you add content to an item and that content teaches users about safety at construction sites, objectives can be:
   - User is able to name the OSHA recommended precautions for trenching.

- User is able to identify the major fall protection measures necessary at a construction site when scaffolding is in use.
- User is able to read and understand Material Safety Data Sheets.

2. Associate the objectives with content objects (or content packages or items) that teach the knowledge described in the objectives. For example, associate a content object teaches users about trench safety with the objective users are able to name the OSHA recommended precautions for trenching.
3. Create a learning item to contain the content. Associate the content with the item (*Learning Activities* > *Items* > *Online Content tab*). Consider the settings you want to use:
   - *Mark item complete when all objects are complete*: Select this checkbox if you want the item to be automatically marked as complete when all content and exam objects that compose the item are marked as complete, either due to the user's successful completion of the object or because the objects are marked as complete by a learning administrator who has access to the *User Item Object Details* window.
   - *Objective Review Enabled*: When selected, allows user to review the objectives in content.
   - *Objective Review Optional*: When selected, allows user to opt out of reviewing the objectives in content.
4. Create questions that test a user's mastery of the objective and assign the objective to the questions.
5. Follow the steps to create a simple online exam. The exam can't be a survey.
6. Associate the objectives to the exam in the exam's Questions tab. Also set the passing grade. Users must answer this percentage of questions correctly to receive a flag for the objective. Optionally, you can also hard-select questions, but if you do, be sure to understand the interaction between questions included by objective and hard-selected questions. The interaction has implications on scoring.
7. In the exam, choose the *Analyze Exam Results* checkbox on the Exam Objects Summary tab, and then set the following:
   - *Clear all objective flags*: This setting applies only when user has failed overall exam. When you select this checkbox, the *Needs Review* flag is set and the *Complete* flag is removed for every objective associated with the exam. The user loses credit for completing all objectives that are represented by questions on the exam, even if he or she passed the objective. The user's curriculum status is only affected for the item in which this exam appears.
   - *Set flags for passed objectives*: When you select this checkbox, the user receives credit for passing objectives. For passed objectives, *Needs Review* flags are cleared, and *Complete* flags are set. Users can **pass** specific objectives that are listed on the *Objectives* section of the exam and fail the overall exam.
   - *Clear flags for failed objectives*: When you select this checkbox, the user loses credit for failing objectives in the exam, even if he or she had previously passed the objective.
8. Add the exam as a pretest or a post-test to the Item. Pretests appear first in the order of online objects. Post-tests appear last.

20.5.1.9.6 Making Exams Available to Users in the Legacy Exam Tool

View this section if you want to know how to make exams available to users.

Context

To make an exam available to users, first:

- Create the questions and edit them
- Build an exam and associate questions with it
- Create a vehicle to assign the exam to users. For example, you can directly assign the exam to a user, you can use a grouping mechanism to assign the exam to a group, or you can associate the exam with a library to allow managers or the end users themselves to assign the exam to their learning plans.

Online exams (simple or adaptive) are delivered through online learning items. You associate the exam to the learning item in the Online Settings tab.

Printed Exams are exams that users can take on paper. They turn the exam back in to you (or another administrator) and you score it. Even if you plan on printing the exam, you still must add it to a learning item and assign the item to a user.

Procedure

1. Select the *Item is Online* check box for the item (*Learning Activities* > *Items* > *Online Content tab*) and then complete the other fields as necessary for your situation. If you only plan to deliver a printed form and if the item contains no other online content, you can clear the *Item is Online* check box.
2. Choose the *Edit* link for the online object that you want to contain the exam, or (if the exam already exists in the object), choose the *Edit* link for the exam. The Edit Online Object page opens.
3. In the *Exams* group box, select the exam you want to present to the users and complete the fields as necessary for your situation. The fields are described in Items: Online Module Exams.
4. You can also add other content to the item. If you're using adaptive exams, see Creating an Adaptive Exam. Apply your changes.
5. Create a vehicle for the learning item to be assigned to users. For example, you can assign the item directly in the users' *Learning Plan* tabs, or you can add the learning item to a library that users have access to so that they can assign the item to themselves or their subordinates.
6. After users take the exam, their completion is tracked in the learning item on their *Learning History*.

Related Information

Adding a New Question in the Legacy Question Editor [page 737]

Building Exams with the Legacy Exam Tool [page 743]

20.5.2 Migration of Questions Between Environments When Using Legacy Questions

To migrate questions in and out of your SAP SuccessFactors Learning environments, you can export and import questions.

If you manage exams in SAP SuccessFactors Learning, chances are that you need to migrate the questions for those exams between environments. For example, you might develop a set of questions in your preview environment and want to bring them into production.

To migrate questions, you use the question import and export tool, which is located in SAP SuccessFactors Learning: *Content* > *Question Import/Export*.

When you import questions, you have the opportunity to include and exclude particular questions. You also see warnings in the *Notes* column if there's a conflict based on the rules listed. Check the warnings and read the rules to make sure your import works smoothly.

The file location for import and export is declared in the *LMS_ADMIN* configuration file, available in the *System Administration* > *Configuration* > *System Configuration* section. The import/export question assistant follows strict rules.

> **Note**
>
> If you're using Assessments, use the import and export data tool. It's located in *System Administration* > *System Management Tools* > *Import Data / Export Data*.

20.5.2.1 Exporting Questions If You're Using Legacy Questions

Export questions out of an SAP SuccessFactors Learning environment so that you can migrate them to another SAP SuccessFactors Learning environment.

Context

> **Note**
>
> If you're using Assessments, use the import and export data tool. It's located at *System Administration* > *Tools* > *Import/Export Data*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Tools* > *Question Import/Export*.
2. Select *Export Questions* and click *Next*.
3. In *File*, type the name of the file that SAP SuccessFactors Learning creates when it exports, and click *Next*.

   For example, you might want to include the date or version of your questions in the export file so that you can distinguish it from other exports.
4. Click *add one or more from list* to select the questions that you want to export, and then click *Next*.

   When you select the questions to export, you have some choices about how you export. You might export, for example, all questions in an objective. When you export, you see all active variants of the question.
5. Review the export file and click *Next*.
6. Click *Download the export file here* to download the `.zip` file that contains the questions in XML format.

Next Steps

Import the question package to the next environment. For example, if your goal is to migrate questions from preview to production, then go to the production environment and import the question package that you exported.

20.5.2.2 Question Export Rules for Legacy Questions

When you export questions from an SAP SuccessFactors Learning environment, SAP SuccessFactors Learning observes rules to make sure that you get only the questions you have permission to but everything you need for the questions.

- The export assistant exports the question as a "question package," which includes all the question's active variants.
- The export assistant checks your domain privileges. If you attempt to export a question package for which you don't have domain access, the assistant won't export it.

> **Note**
>
> If you're using Assessments, use the import and export data tool. It's located at *System Administration* > *Tools* > *Import/Export Data*.

20.5.2.3 Importing Questions If You Are Using Legacy Questions

You can import questions to an SAP SuccessFactors Learning environment that migrated from another SAP SuccessFactors Learning environment.

Context

> **Note**
>
> If you're using Assessments, use the import and export data tool. It's located at *System Administration* > *Tools* > *Import/Export Data*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Content* > *Tools* > *Question Import/Export*.
2. Select *Import Questions* and click *Next*.
3. Click *Choose File*, browse for the `.zip` file that contains the import package, and click *Next*.

   This is the `.zip` file that you exported from another environment.
4. Look at the *Analyze and Review* report to compare the questions that you're about to import against the current system.

   Check *Notes* for conflicts based on the import rules. Click *Open Question Search* to look up more details for the question in the current system.
5. If you see a conflict for any question, you can clear the *Import* box and the import wizard ignores it.
6. Click *Next* to go to the final review and then *Finish* to complete the import.

20.5.2.4 Question Import Rules for Legacy Questions

When you import questions to an SAP SuccessFactors Learning environment, SAP SuccessFactors Learning observes rules to make sure that you import the questions you have permission to and also everything you need for the questions to work properly in the new environment.

> **Note**
>
> If you're using Assessments, use the import and export data tool. It's located at *System Administration* > *Tools* > *Import/Export Data*.

In almost all cases, you don't create question packages yourself. Instead, you export the package from one environment (like preview) and you import that package to a second environment (like production). Because the package (`.zip` file) is created using the export assistant, you have already run through the export rules. For example, you're only able to export questions that you have permission to export. So, if your user on the import environment has the same permissions, the questions go through without a problem.

- The import assistant imports the question as a "question package," which includes all the question's active variants.
- The import assistant checks your domain privileges. If you attempt to export a question package and you don't have domain access to the package, the assistant doesn't import it.
- The exam, domain, or objective itself isn't imported. Those must exist for the questions.

The import assistant uses the question name field on the question record to identify conflicts:

- If you import a question package and the question name of the package doesn't exist in the system, the assistant creates it.
- If you import a question package and the question name and last modified date match an existing question, the assistant doesn't import the question.
- If you import a question package and the question name matches an existing question, but the last modified dates don't match, then the assistant creates a new revision of the question.
  - If the metadata of the imported question doesn't match the metadata of the existing question, the assistant uses the metadata of the most recently modified question.
  - If the imported question has additional variants and revisions, the assistant adds them to the question.
  - If the imported question has fewer variants and revisions, the assistant leaves the extra variants and revisions in the existing question. Additional variants and revisions aren't deleted.
  - If the domain ID of the imported question doesn't exist, the assistant creates the domain's required fields and associates the question with it. Any additional configuration of the domain isn't imported. If you also created a workflow system that the domain fits into, for example, you must recreate it.
  - If the last modified dates of the variants in a question package match the last modified dates of the variants of the existing question, the assistant doesn't create new active revisions of the variants.
- If the assistant creates new active revisions as part of the import process, and the question is associated with an exam, users who are in the process of taking an exam continue to use the old revision.

Related Information

Question Export Rules for Legacy Questions [page 749]

20.5.2.5 Objective Import Rules for Legacy Questions

SAP SuccessFactors Learning follows rules to manage conflicts with objectives when you import questions.

> **Note**
>
> If you're using Assessments, use the import and export data tool. It's located at *System Administration* > *Tools* > *Import/Export Data*.

When you import question packages, the package can be associated with an objective. If question packages are associated with an objective, the import assistant imports only the association, not the objective itself. If the objective already exists in the system, the import assistant associates the package to the existing objective. If the objective doesn't exist, the assistant only creates enough information to create the objective record and make the association. If there's a conflict, the import assistant only affects fields necessary to identify the objective: name, ID, and domain.

- If a question in the import file is associated with an objective, and the associated objective name matches an objective's name that already exists in the system, then the system compares the last modified date from the associated objective to the last modified date in the existing objective. If the names match, the system compares the last modified dates of the two objectives:
  - If the last modified dates match, the import assistant skips the objective. Questions that were associated with the objective to be imported are associated with the objective that already exists in the system.
  - If the last modified dates don't match, then the assistant uses the domain ID of the most recently updated objective. If the most recently updated objective uses a domain ID that doesn't exist, the import assistant creates it.
- If a question in the import file is associated with an objective that doesn't exist in the system, the assistant creates a new objective in the system and completes the required fields for an objective record. If the new objective was associated with items or content objects in the system you exported the question package from, those associations aren't imported. You can recreate them in the system you're importing to.

Related Information

Question Import Rules for Legacy Questions [page 750]
Importing Questions If You Are Using Legacy Questions [page 750]

20.6 Legacy SAP SuccessFactors Learning Exams

SAP SuccessFactors Learning exams are a learning assessment tool that offers flexibility and security.

When you want to assess your users' ability to absorb training content, and you want to create robust systems for the assessment, you create exams. Alternatively, you can create quizzes, which are easier to create and manage but do not offer all the features of exams.

An exam, unlike a quiz, draws from a bank of questions that are outside of the exam. How the exam draws questions from the bank is determined by your configuration: how you create variants, objective pools, and randomization. Each presentation of the same exam at run time can pose different questions to individual users because the exam can draw different questions at each iteration.

20.6.1 Legacy Exam Behavior

Depending on how you configure exams, they can behave differently when employees sit for the exams.

Companies often have rules about how employees sit for exams. For example, some companies require proctors for their exams. Other companies want an exam to adapt to employees: as users correctly or incorrectly answer questions, the exam adjusts.

20.6.1.1 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.

20.6.1.1.1 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.

This field...	Is used as follows...
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.

20.6.1.1.2 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 753]
Instructor's Proctor Status Fields [page 575]
Generating Proctor Codes For Instructors [page 557]
Sending Proctor Codes to Instructors [page 559]

Purging Instructor Proctor Codes [page 560]
Deleting Instructor Proctor Codes [page 560]

20.6.1.2 Legacy Online Exam Content Configuration for Adaptive Learning

You can configure online exam contents for adaptive learning for both pretest and post-test considerations.

You can configure online exam contents for adaptive learning in two modules: the online settings of the items (*Learning Activities* > *Items* > *Online Settings*) and on the Exam Objects itself (*Content* > *Exam Objects*).

Pre-test

- On the exam object (*Content* > *Exam Objects*) set the *Pass Percentage* to zero (0). This isn't because passing is a requirement.
- Set the exam object *Maximum tries* to one (1) because you don't want the user to take the pre-test multiple times.
- In the *Edit Exam Analysis* module, check the *Analyze the exam results* check box and ensure that the *Set Flags Pass Objectives* and *Set Flag Failed Objectives* check boxes are checked.

Post-test

- On the *Online Settings* tab of the item (*Learning Activities* > *Items* > *Online Settings*), check the *Mark item complete when all objects are complete* check box.
- In the *Edit Exam Analysis* module, check the *Analyze the exam results* check box and ensure that the *Clear Flags Pass Objectives* and *Clear Flags for Failed Objectives* check boxes are checked. This is helpful for remediation.

20.6.1.3 Legacy Adaptive Online Exams

Adaptive legacy exams adapt the online content of a learning item based on a user's success or failure in an online exam.

Adaptive exams use objectives to test learning outcomes. Users either demonstrate proficiency in a learning objective (pass) or they don't (fail). To demonstrate proficiency in the objective, users correctly answer questions that are associated with the objective. When they answer enough questions correctly and pass the objective, SAP SuccessFactors Learning takes actions on the content objects that contain the objective.

Adaptive Learning

Users take exams before other content to assess their existing knowledge. If users pass all the objectives associated with a content object, the content object is marked complete. The learning item shows only incomplete content objects to users so that they'vecan skip content that they already mastered.

Remediation Post-tests

Users take exams after they complete a learning item's other content objects. The post-test assesses mastery of the content object's learning objectives. When users fail one or more objective associated with a content object, the content object is no longer marked complete. Users must review the incomplete content (content that they haven't mastered).

Adaptive exams rely on flags, which are set during exam analysis. During the exam, users answer questions that are associated with an objective. If they correctly answer enough questions from the objective to receive a passing grade, then they receive a flag for the objective. When a user has a flag for all objectives in a content object (or package, or item), users can:

- Skip content objects (in the case of a pre-test)
- Avoid reviewing content objects (in the case of a post-test)

Users aren't forced to skip or review content. Instead, if they fail an objective, they receive a *Needs Review* flag on the associated object. In their *Content Structure* page, every object that has a *Needs Review* flag contains the sentence "This content object needs to be reviewed" in the *Status* column. You can remove the flag in the *Object Details* page of the *User's Learning Plan*.

Objectives are the connection between questions, content, and flags, so you should create your objectives carefully. After you configure objectives, associate them with both content that fulfills the objectives and questions that measure proficiency in the content.

20.6.2 Legacy Exam Objects' Summary Fields

Exam objects' summary fields control the behavior of exams.

General Exam Settings

To learn more about creating questions for exams, read the information about question editor activities.

This Field...	...Is used as follows
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Is Active	When you select this check box the exam or survey is available for assignment to content objects and online items, for reports, and for revision.
Is Online	Under normal use, the check box is selected, which allows users to link to the exam. If, however, you discover a problem in the exam and you want to disable the link, clear the check box. All the associations with items are preserved; however, while the check box is clear, users cannot open the exam. You can take the exam offline if, for example, you need to update it and you want to prevent users from accessing the object until it is updated.
Description	Because the content of this box does not appear in the user interface or any reports, we recommend that you use the box to fully explain to other administrators the purpose for creating this entity.
Exam Type	Exams can be sequential or free-form. Sequential presentation exams require users to answer each question in order before they can move on to the next question. Free-form movement exams allow the user to move backward and forward in the list of questions, regardless of whether they have answered the question. To read more about sequential and free-form exams, see Exams.
Is survey	This check box, when selected, indicates that the object is a survey. When an exam is a survey, it behaves differently and you have different options. To learn more about exams as surveys, see Exams.
Question Count	The number of questions that appear on the exam. The minimum and maximum number of questions appear in parenthesis. The minimum and maximum is determined in both the Objectives and the Questions tabs.

This Field...	...Is used as follows
Pass Percentage	The minimum percentage of correct answers that result in a passing grade. If a user's score is within one half of a percentage point of the pass percentage value, the score is not rounded up to the minimum passing grade. For pre-test and post test adaptive exams, you should set the pass percentage to "0" (zero) because passing is not a requirement.
Maximum Tries	The number of times a user can attempt the exam before losing permission to access the exam. A value of 0 allows users to attempt the exam an unlimited number of times. To restore a user's access, navigate *People* > *Learning Plan*, find the item and click the *Object Details* link, click the *Object Title* link, and select the *Has Access* check box.
Exam Duration	The amount of time a user has to complete the exam. If you specify an exam, the exam becomes a Timed Exam.

Exam Actions

Exam actions control general behavior of the exam.

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.
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.
Display a welcome message at the start of the exam	When you select this check box, a message will appear that describes the exam type and explains the rules of movement within the exam before the first question of the exam.
User can stop and resume exam before it is scored	When you select this check box a user is allowed to log off in the middle of an exam and complete it later. If the check box is not selected, users must complete it in one session.
Dipslay Point Values for each question	

This Field...	...Is used as follows
User can review the exam questions after it is scored	When you select this check box, the buttons on the exam's Scores Page allow the users to return to questions that have already been answered so they can see the correct answer and the answer they selected. Users can choose to review all exam questions or only incorrectly answered questions. For surveys, this feature does not apply.

Exam Feedback

The feedback options control the kind of feedback that users receive from the exam for correct and incorrect answers, globally, for the exam. Feedback interacts with other behavior, so check Exams to understand the connections.

This Field...	...Is used as follows
Show only correct Feedback	Shows feedback to user only when they give the correct answer.
Show only incorrect Feedback	Shows feedback to users when they answer the question incorrectly.
Show both correct and incorrect Feedback	Shows feedback to the user whether they answer the question correctly or not.
Don't show any Feedback	Does not show feedback, even if the questions have feedback settings.

Scoring Options

The time at which exams are scored is controlled by the sequencing of the exam. To learn more about exam types and sequencing. You can show two kinds of scoring information to users when the exam is scored:

This Field...	...Is used as follows
Show Pass or Fail once exam is scored	Shows users if they passed the exam.
Show percentage correct once exam is scored	Shows users the percentage of questions they answered correctly.

Edit Exam Analysis

The Edit Exam Analysis area contains how the exam behaves after it is scored. Exam analysis does not occur when the exam is a survey. See Adaptive Online Exams for more information about exam analysis.

This Field...	...Is used as follows
Analyze the exam results	When you select this check box, the other check boxes in the Edit Exam Analysis module are activated.
On Passing/On Failure	The check boxes in these sections specify what happens when a user has either passed or failed the exam.
Lock exam	When you select this check box, the user is not allowed to enter the exam again without instructor or administrator intervention, regardless of the Maximum tries. The Has access flag must be reset. To do so, navigate *Users* > *Learning Plan*, find the item and click the *Object Details* link, click the *Object Title* link, and select the *Has Access* check box.
Lock item	When you select this check box, the user is not allowed to access the item that contains this exam without instructor or administrator intervention.
Exit item	When you select this check box, when the user exits the exam, he or she is also removed from the item that contains the exam or survey. This is typically used in conjunction with the *Lock Item* option.
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.
Clear all objective flags	Applicable only when user has failed overall exam. When you select this check box, the Needs Review flag is set, and the Complete flag is removed for every objective associated with the exam. It represents the most severe consequence for a user failing to achieve the overall passing exam score. The user loses credit for completing all objectives that are represented by a question on the exam, even if he or she passed the objective. The user's curriculum status is only affected for the item in which this exam appears.

This Field...	...Is used as follows
Set flags for passed objectives	When you select this check box, the user receives credit for passing objectives. For passed objectives, Needs Review flags are cleared, and Complete flags are set. users can pass specific objectives that are listed on the Objectives tab of the exam and fail the overall exam.
Clear flags for failed objectives	When you select this check box, the user loses credit for failing objectives in the exam, even if he or she had previously passed the objective.

20.6.2.1 Copying a Legacy Exam Object

Copying exams is the most efficient way to create a new exam object when you want to reuse information from an existing exam.

Procedure

1. Go to *Content* > *Exam Objects (Legacy)* > *Summary*, and then click *Copy*.
2. Type a new exam name in *Exam Name*.

   The system requires a new exam name because you're creating a new instance of the existing exam object, but the new instance doesn't link to the existing exam object. Choose a descriptive name so that administrators can easily identify the exam object.
3. Select the options for the copy.

Option	Description
Copy Options for Analysis-based Actions	Copies the options you select in the Edit Exam Analysis section to the new exam object.
Copy Exam Messages	Copies the exam messages from the Messages tab to the new exam object.
Copy Objectives and Questions	copies the objectives and questions from the Questions tab to the new exam object.
Copy Custom Fields	Copies any custom fields from the Custom Fields tab to the new exam object.
4. Click **Copy**.

Results

The system adds a new exam with your new exam name. The new exam includes the options that you copied from the old exam.

Related Information

Legacy Exam Objects' Summary Fields [page 757]
Legacy SAP SuccessFactors Learning Exam Messages Tab [page 763]
Legacy SAP SuccessFactors Learning Exam Questions Tab [page 763]
Legacy SAP SuccessFactors Learning Exam Custom Fields Tab [page 765]

20.6.3 Legacy SAP SuccessFactors Learning Exam Messages Tab

Use the SAP SuccessFactors Learning *Messages* tab to view, add, or edit the messages users will see before and after an exam.

Go to *Content* > *Exam Objects (Legacy)* > *Messages tab* to view and configure the messages that users see before and after the exam. The settings on this tab determine which messages appear to the user and are based on the flags set here and on the *Summary* tab.

This field...	Is used as follows...
Exam Messages Enabled	When you select this check box, messages are enabled.
Display Message	When you select this check box, the message of the associated module is displayed.
User ID required at this message point	When you select this check box, the user must type his or her User ID before proceeding.

20.6.4 Legacy SAP SuccessFactors Learning Exam Questions Tab

Use the SAP SuccessFactors Learning *Questions* tab to view, add, or edit the questions that are included in an exam or survey.

Go to *Content* > *Exam Objects (Legacy)* > *Questions* tab to view, add, or edit the questions that are included in an exam or survey. When you add questions, you can click the *Move Up* or *Move Down* buttons to change the display order, which controls how the questions appear in the user interface. The system enforces order when you select *Display Questions and Objectives in Order*.

To see the questions themselves, along with the variant, the revision, and other information, click *Expand*. You must interpret the information under the expand button differently for hard-selected questions and objective pools. The information under a hard-selected question describes a question that always appears on the run time exam. The questions described under an objective pool describe the pool of questions from which the run-time exam chooses an amount of questions between the *Minimum* and *Maximum* values.

20.6.4.1 Legacy SAP SuccessFactors Learning Exam Question Tab Fields

The fields of the SAP SuccessFactors Learning *Questions* tab help you to add and edit the questions that are included in an exam or survey.

This field...	Is used as follows...
Objective ID	If you pool questions into an objective, you see the unique objective ID. Using objectives is a way to create adaptive exams. In cases where you have hard-selected a question variant for the exam, the Objective ID column does not display the question's objective ID, even if it is associated with one.
Objective Name	This is the name of the objective if you associated an objective with the exam to create objective pools. If you hard-select a question, however, the word **Required** appears, followed by the question stem.
Available	This is the amount of questions available in the pool of questions. For hard-selected questions, the value is **1** and it represents a particular variant of the question.
Minimum	This is the minimum number of questions from the objective that the run-time exam includes.
Maximum	This is the maximum number of questions from the objective that the run-time exam includes.
Pass	This percetange is the passing grade for the objective. The pass grade is particularly important in adaptive exams.
Points	This indicates the points associated with the objective for score-weighting purposes.

20.6.5 Legacy SAP SuccessFactors Learning Exam Item Usage Tab

Use the SAP SuccessFactors Learning *Exam Item Usage* tab to view items that include an exam or survey.

Go to *Content* > *Exam Objects* > *Item Usage* tab to view all items that include an exam or survey. Online exams are included in items (*Learning Activities* > *Items* > *Online Content* tab).

Fields on this tab are view-only.

This field...	Is used as follows...
Item	This is the item type, the Item ID, and the revision of the item.
Object Title	This is the title of the item.

20.6.6 Legacy SAP SuccessFactors Learning Exam User Usage Tab

Use the SAP SuccessFactors Learning *Exam User Usage* tab to view the history of an exam.

Each row summarizes a user's overall exam performance compared to the minimum passing score. To view the tab go to *Content* > *Exam Objects* > *User Usage tab* .

The fields on this tab are view only.

This field...	Displays
User ID	The unique ID of the user who took the exam or completed the survey.
Item	The item that the exam is associated with.
Object Title/Iteration	The title of the survey or exam and the iteration of the exam.
Finished/Complete	The date the exam was finished or completed.
Complete Date	The date that the user completed the exam.
Pass Grade/Score	The passing grade or score.

20.6.7 Legacy SAP SuccessFactors Learning Exam Custom Fields Tab

Use the SAP SuccessFactors Learning *Custom Fields* tab to assign a value for any custom fields that were added for a record type.

You can use custom fields to assign a value for any custom fields (*System Administration* > *Custom Fields*) that were added for this record type. To do this, go to . If the custom column accepts only referenced values, you can select one of those values from the associated list. Otherwise, you can enter any value up to 40 alphanumeric or special characters in the associated box.

20.6.8 Legacy SAP SuccessFactors Learning Exam Printed Exams Tab

Use to SAP SuccessFactors Learning *Printed Exams* tab to generate a unique printed exam template from any existing exam object.

To generate the printed exam template, go to *Content* > *Exam Objects* > *Printed Exams*. Once you generate a unique printed exam template, you can print the exam as you like, giving the instructors two options for presenting a printed examination to their users:

- Give each user in the class exactly the same printed examination based upon the questions and objectives established in the exam object.
- Create multiple exam templates based on the questions and objectives established in the exam object so that every user could have a different exam.

Once the users have taken the exams, their responses can be entered into *SuccessFactors Learning Administration*, at which time *SuccessFactors Learning Administration* will score the exams and record a history record for the user. Exam printing and scoring is accomplished from the *Printed Exams* tab of the *Exam/Survey Objects* section.

This field...	Is used as follows...
Exam Sequence ID	This is the unique exam sequence ID which was assigned when the exam was generated for printing.
Print	Click the *Print* link to print the corresponding exam.
Record Scores	Click the *Score* link to record scores.

To understand how to generate, print, and score exams,consider the following examples.

Each time a new exam is generated for printing, it is assigned a unique *Exam Sequence ID*. The questions for each printed exam are selected based on the settings established for the exam on the various tabs in the *Exam/Survey Objects* section. The sequence of the exam questions for each exam sequence is always randomized regardless of the settings in the *Exam/Survey Objects* section. An instructor can either give each person in the class a completely different printed exam or give each user a copy of exactly the same exam.

Example 1

You can generate 10 unique, 10-question exam sequences, each of which contain the same five core questions (selected according to the settings on the *Questions* tab) and five random questions (selected according to the settings in the *Objectives* tab). Each exam presents the questions in a different random sequence.

Example 2

You can generate one 10-question exam sequence and print 10 copies of that same exam sequence to give all the users an identical exam.

20.6.9 Printed Exam Templates

SAP SuccessFactors Learning uses printed exam templates to create an exam that users can take on paper from the online exams that you create.

Most customers do not need to change the printed exam templates. Many customers do not test their users in a formal way. Of the customers who do test users, many can use quizzes instead of exams. Even among those

customers who test their users and also use exams, many only offer their exams online or, if they do offer them in printed format, can use the default template. An important minority of customers, however, do use printed exams and do want to change the default template. If you are such a customer, you can change the template in SAP SuccessFactors Learning by going to *Content* > *Printed Exam Templates*.

> ⚠ Caution
>
> If you change the template, we strongly recommend that you do not change the logic. The logic is coded in Apache Velocity.

Within the important minority of customers who change the templates, most need to change only the styles and boilerplate. To change the styles, we recommend that you create a CSS file and point the template to it. To change the boilerplate, you can edit the file.

For example, this is the default boilerplate to describe the start and end time of the exam.

{·} Sample Code

```
#if ($exam.isSurvey()==false && $exam.getExamDuration()!="")
<td><span class="DataLabel">Exam Duration : $exam.getExamDuration()</span></td>
  <tr>
    <td><span class="DataLabel">Exam Start Time : _____________________</span></td>
    <td><span class="DataLabel">Exam End Time : _____________________</span></td>
 </tr>
#end
```

However, you might want to call the “exam” a “test” and you might want to drop the text “Time”.

{·} Sample Code

```
#if ($exam.isSurvey()==false && $exam.getExamDuration()!="")
<td><span class="DataLabel">Exam Duration : $exam.getExamDuration()</span></td>
  <tr>
    <td><span class="DataLabel">Test Start: _____________________</span></td>
    <td><span class="DataLabel">Test End: _____________________</span></td>
 </tr>
#end
```

Notice that the CSS class and logic remain the same. The boilerplate, however, changes.

20.7 Online Learning Content Import

Use online learning content import to import on-demand courses to a content deployment location.

As a learning administrator, you often need to import learning course content to a content deployment location so that your learners can view it. We provide content import tools to help you through the task.

20.7.1 SAP SuccessFactors Learning Import Content

The SAP SuccessFactors Learning *Content Import* tool is a wizard that you can use to import one or more content packages, deploy them to a content server, and create and configure items to be associated with those content packages.

Considerations for Importing Content

Before you begin importing content, consider the following:

- If you have premium iContent, you must reach out to your iContent consultant about possibilities of setting this up.
- Any files that you upload won't be compressed on the iContent server.
- When you upload a file with any extension, for example .pdf or .doc, then the document directly gets placed on the iContent server. If you're uploading a zip file, then the file gets extracted on the iContent server.
- If you have enabled offline player, along with the extracted files, the main zip file will also be placed on the iContent server.
- You're responsible for ensuring that zip files don't contain malicious JavaScript code.
- The administrator who imports any iContent is the default sender of email notification for the Content Import background job if that administrator has an email address listed in their *Security* > *Administrators* profile. If no email address is listed for that administrator, the email notifications are sent by the *Application Notification Admin Email* listed in *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.

Accessing Import Content Option

You can access the Import Content option at *Content* > *Import Content*.

The first step of the wizard prompts you to indicate what you want to do. You have four choices:

1. *Add New Content*
   Select this option to add new desktop content.
2. *Add Content for an Existing Item*
   Select this option to add online course content to an existing learning item.
3. *Replace Content for an Existing Item*
   Select this option to import updated online course content to an existing learning item.
4. *Enable Mobile or Offline Content for an Existing Item*
   Select this option to update an existing learning item with mobile or offline player content.

Once you have made your initial choice, you're presented with additional fields to select or complete.

The following table describes the fields and your options. Required fields are marked with an asterisk on the screen.

This field...	Is used as follows...
Deploy content to server	If selected, the system deploys the content at the end of the tool wizard.
Server Location	You declare server locations in *System Administration* > *Configuration* > *Content Deployment Locations* so that you can upload content to it.
Security Domain ID	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Content Package ID and *Content Package ID Prefix*	If you're importing only one content package, you can enter a value in the *Content Package ID* box to create a unique ID for the package that you want to import. **Note** For SCORM 2004 content, ensure that you insert a Content Package ID. This is mandatory due to the sequencing rules. If you're importing multiple content packages, the system provides a *Content Package ID Prefix* box so that, if you provide a value, all of the content packages have the same prefix. The system then appends a number to the prefix to ensure that each content package has a unique ID. If you don't provide a value for the *Content Package ID Prefix* box, the system creates a content package ID (based on values the import manifest) for each file that you import.
Enable mobile access for all content	Select *Enable mobile access for all content* to enable the content for use with the mobile app and browser.
Enable offline player download	If selected, users of the offline player can download and run the content. If you enable offline player download, you can't have spaces in the `.zip` file name. For example, "my_file.zip" is correct but "my file.zip" is incorrect.
Launch Mode	You can set course content to launch in a new browser window. (For the *Launch in a New Browser Window* option to be available, ensure that you've selected the *Display "Launch in a new Browser Window" option for content objects* option in *System Administration* > *Configuration* > *Global Applications Settings*.)

This field...	Is used as follows...
Use AICC Wrapper	Select this option to apply the AICC wrapper to any nonstructured content. The wrapper allows the content to behave like structured content.
Add New Item	If you select the *Create a new Learning item for each content package* checkbox, then the system creates a new item entity for each content package that you're importing. You might want to create a new item so that, as soon as the system imports the content packages, users can access those items (from their libraries) and access the content in the user interface. When you add new items in this way, the system applies all of the settings to all of the items that it creates. **Note** All of the controls (except the *Item ID* box) are identical to the ones that appear on the different tabs of the item entity. The system requires every item to have a unique item ID. Therefore, when you have the system create an item for each content package that you want to import, you can provide a **prefix** for those item IDs; the system appends a number to the prefix to ensure that each item has a unique ID.

20.7.2 Importing Content to Add to an Existing Learning Item

Import and add online course content to an existing learning item when you have a local copy of the online course that you want to upload to a content server, and you have an existing learning item that should contain the new content.

Prerequisites

You must have at least one content deployment location. Go to *System Administration* > *Configuration* > *Content Deployment Locations*.

You must have a learning item of type Online or Instructor-Led with Online Content. Go to *Learning Activities* > *Items*.

Before you import course content for the first time, we recommend reviewing your import settings. Go to *System Administration* > *Configuration* > *System Configuration* > *CONTENT IMPORT*.

Optionally, set up a test user.

A test user is a standard user account that is associated with a content deployment location. You set up the test user in *System Administration* > *Configuration* > *Content Deployment Locations*. Later, when you import

content to the content deployment location in *Content* > *Import Content*, you can assign the content to the test user to verify that the content uploaded correctly. For example, you can create a user called **PCS Test** and add the account to the *Test User* box in the premium content management content deployment location. Then, each time you import content to premium content management with the *Import Content* tool, you can create a learning item for content and assign the learning item to **PCS Test**, then log in as **PCS Test** to launch the content to make sure that it imported properly.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Import Content*.
2. Select *Add content for an Existing item*, and click *Next*.
3. Choose *Browse* to locate the file that you want to upload, and then choose *Next*.
4. To deploy the content to the content deployment location at the end of the process, choose *Deploy Content*.
5. Select the server where you want to post your content in *Server Location*.

   You declare server locations in *System Administration* > *Configuration* > *Content Deployment Locations* so that you can upload content to it.
6. If the server location (content deployment location) is part of the Premium Content Management service, select *Send Deployment Notification to Premium Content Management* to notify the service that you have imported content.
7. In *Reassign* select how you want assignments to work after you import the content.
   - Select *Reassign the new content to all users* if you think that the content is so different that all users should lose their progress in the content and start over.
   - Select *Do not reassign the new content to users* if you want users who are currently assigned to the learning item to finish with the old content but new assignments to get the new content.
8. Select the learning item that should contain the new content in *Items*.
9. Click *Import Files*.

   > → Tip
   >
   > If you see an error that states you cannot import files because they already exist in the learning item, go to *Content* > *Tools* > *Import Content* and select *Replace content for an Existing item* .
10. On the *Import Summary* page, check the import status.
11. Choose *Edit Content* to change the Content Object IDs of the content you imported.
12. Choose *Schedule Job* to complete the process.

Related Information

Importing Content to Enable it for Mobile or Offline Use in an Existing Learning Item [page 774]
Importing Updated Content for an Existing Learning Item [page 772]
Identifying Content Servers for Online Courses [page 780]
Learning Item Details Fields [page 148]

Settings That Control Online Content in a Learning Item [page 47]
CONTENT IMPORT System Properties File [page 792]
SAP SuccessFactors Learning Import Content [page 768]
Importing Content to Enable it for Mobile or Offline Use in an Existing Learning Item [page 774]
Importing Content to Add to an Existing Learning Item [page 770]
Identifying Content Servers for Online Courses [page 780]
Learning Item Details Fields [page 148]
Settings That Control Online Content in a Learning Item [page 47]
CONTENT IMPORT System Properties File [page 792]
SAP SuccessFactors Learning Import Content [page 768]

20.7.3 Importing Updated Content for an Existing Learning Item

Import updated online course content when you have a local copy of the online course that you want to upload to a content server, and you have an existing learning item that has an old version of the content.

Prerequisites

You must have at least one content deployment location. Go to *System Administration* > *Configuration* > *Content Deployment Locations*.

You must have a learning item of type Online or Instructor-Led with Online Content. Go to *Learning Activities* > *Items*.

Before you import course content for the first time, we recommend reviewing your import settings. Go to *System Administration* > *Configuration* > *System Configuration* > *CONTENT IMPORT*.

Optionally, set up a test user.

A test user is a standard user account that is associated with a content deployment location. You set up the test user in *System Administration* > *Configuration* > *Content Deployment Locations*. Later, when you import content to the content deployment location in *Content* > *Import Content*, you can assign the content to the test user to verify that the content uploaded correctly. For example, you can create a user called **PCS Test** and add the account to the *Test User* box in the premium content management content deployment location. Then, each time you import content to premium content management with the *Import Content* tool, you can create a learning item for content and assign the learning item to **PCS Test**, then log in as **PCS Test** to launch the content to make sure that it imported properly.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Import Content*.
2. Select *Replace content for existing item* and then click *Next*.
3. Choose *Browse* to locate the file that you want to upload, and then choose *Next*.
4. To deploy the content to the content deployment location at the end of the process, choose *Deploy Content*.
5. Select the server where you want to post your content in *Server Location*.

   You declare server locations in *System Administration* > *Configuration* > *Content Deployment Locations* so that you can upload content to it.
6. If the server location (content deployment location) is part of the Premium Content Management service, select *Send Deployment Notification to Premium Content Management* to notify the service that you have imported content.
7. Select *Reassign the new content to all users* to assign the updated content to users who have the course on their learning plan.

   > **Note**
   >
   > By default, *Do not reassign the new content to users* is disabled.
8. Select the learning item that should contain the updated content in *Items*.
9. Choose *Import Files*.
10. On the *Import Summary* page, check the import status.
11. Choose *Edit Content* to change the Content Object IDs of the content you imported.
12. Choose *Schedule Job* to complete the process.

Next Steps

Because some content object settings do not carry over from the original content object, update the content settings as needed in the new content object.

20.7.4 Importing Content to Enable it for Mobile or Offline Use in an Existing Learning Item

Import online course content and enable it for mobile or offline use when you have a local copy of the online course that you want to upload to a content server, you have an existing learning item that should contain the content, and the content is not yet used for mobile or offline player.

Prerequisites

You must have at least one content deployment location. Go to *System Administration* > *Configuration* > *Content Deployment Locations*.

You must have a learning item of type Online or Instructor-Led with Online Content. Go to *Learning Activities* > *Items*.

Before you import course content for the first time, we recommend reviewing your import settings. Go to *System Administration* > *Configuration* > *System Configuration* > *CONTENT IMPORT*.

Optionally, set up a test user.

A test user is a standard user account that is associated with a content deployment location. You set up the test user in *System Administration* > *Configuration* > *Content Deployment Locations*. Later, when you import content to the content deployment location in *Content* > *Import Content*, you can assign the content to the test user to verify that the content uploaded correctly. For example, you can create a user called **PCS Test** and add the account to the *Test User* box in the premium content management content deployment location. Then, each time you import content to premium content management with the *Import Content* tool, you can create a learning item for content and assign the learning item to **PCS Test**, then log in as **PCS Test** to launch the content to make sure that it imported properly.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Import Content*.
2. Select *Enable Mobile or Offline Content for an Existing Item*, and click *Next*.
3. Choose *Browse* to locate the file that you want to upload, and then choose *Next*.
4. To deploy the content to the content deployment location at the end of the process, choose *Deploy Content*.
5. Select the server where you want to post your content in *Server Location*.

   You declare server locations in *System Administration* > *Configuration* > *Content Deployment Locations* so that you can upload content to it.
6. If the server location (content deployment location) is part of the Premium Content Management service, select *Send Deployment Notification to Premium Content Management* to notify the service that you have imported content.
7. Select *Enable mobile access for all content* to allow users to access this content on their mobile devices.

We recommend you work with a content developer to make sure that the content is mobile ready.

8. Select *Enable offline player download* to enable users with offline player to download it to their workstations.
9. Select the learning item that should contain the new content in *Items*.
10. Choose *Import Files*.
11. On the *Import Summary* page, check the import status.
12. Choose *Edit Content* to change the Content Object IDs of the content you imported.
13. Choose *Schedule Job* to complete the process.

Related Information

Importing New Online Course Content [page 775]
Importing Content to Add to an Existing Learning Item [page 770]
Importing Updated Content for an Existing Learning Item [page 772]
Identifying Content Servers for Online Courses [page 780]
Learning Item Details Fields [page 148]
Settings That Control Online Content in a Learning Item [page 47]
CONTENT IMPORT System Properties File [page 792]
SAP SuccessFactors Learning Import Content [page 768]

20.7.5 Importing New Online Course Content

Import new online course content when you have a local copy of the online course that you want to upload to a content server, but you don't yet have a learning item that should contain it.

Prerequisites

You must have at least one content deployment location. Go to *System Administration* > *Configuration* > *Content Deployment* > *Locations*.

You must have a learning item of type *Online* or *Instructor-Led with Online Content*. Go to *Learning Activities* > *Items*.

Before you import course content for the first time, we recommend reviewing your import settings. Go to *System Administration* > *Configuration* > *System Configuration* > *CONTENT IMPORT*.

Optionally, set up a test user. A test user is a standard user account that is associated with a content deployment location. You set up the test user in *System Administration* > *Configuration* > *Content Deployment Locations*. Later, when you import content to the content deployment location in *Content* > *Import Content*, you can assign the content to the test user to verify that the content uploaded correctly.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Content* > *Import Content*.
2. Select *Add New Content*, then choose *Next*.
3. Choose *Browse* to locate the file that you want to upload, and then choose *Next*.
4. To deploy the content to the content deployment location at the end of the process, select the *Deploy Content* checkbox.
5. Select the Server Location and Security Domain ID from the dropdowns and enter a Content Package ID. If the server location (content deployment location) is part of the Premium Content Management service, select the *Send Deployment Notification to Premium Content Management* checkbox to notify the service that you have imported content.
6. Optionally, select the checkboxes for mobile access, offline access, launch mode, and AICC wrapper.
7. To create a learning item and attach this content to it, select the *Create a new Learning item for each content package* checkbox.

   If you select the *Create a new Learning item for each content package* checkbox, then the system creates a new item entity for each content package that you're importing. You might want to create a new item so that, as soon as the system imports the content packages, users can access those items (from their libraries) and access the content in the user interface. When you add new items in this way, the system applies all of the settings to all of the items that it creates.

   a. In the Summary section, add the required details for the new Learning item.

   > **Note**
   >
   > All of the controls (except the *Item ID* box) are identical to the ones that appear on the different tabs of the item entity. The system requires every item to have a unique item ID. Therefore, when you have the system create an item for each content package that you want to import, you can provide a **prefix** for those item IDs; the system appends a number to the prefix to ensure that each item has a unique ID.

   b. In the Settings section, select any applicable checkboxes and choose a Completion Status and a Failure Status from the dropdowns as required.
   c. In the Library and Category section, add the Library ID and Category ID as needed.
   d. Optionally, select *Assign Content to Test User* in the Test User Learning Plan section to assign the content to a test user to check if it imported correctly.
8. Choose *Import Files*.
9. On the *Import Summary* page, check the import status.
10. Choose *Edit Content* to change the Content Object IDs of the content you imported.
11. Choose *Schedule Job* to complete the process.

Next Steps

After you complete the content import, consider logging in as the test user to test the imported content.

Related Information

Importing Content to Enable it for Mobile or Offline Use in an Existing Learning Item [page 774]
Importing Content to Add to an Existing Learning Item [page 770]
Importing Updated Content for an Existing Learning Item [page 772]
Identifying Content Servers for Online Courses [page 780]
Learning Item Details Fields [page 148]
Settings That Control Online Content in a Learning Item [page 47]
CONTENT IMPORT System Properties File [page 792]
SAP SuccessFactors Learning Import Content [page 768]

20.7.6 Deleting iContent Files Using the iContent Management Tool

You can identify and bulk delete unused or irrelevant content stored in iContent server on the *iContent Management* page.

Prerequisites

- You have the *View iContent Management* permission to access the *iContent Management* tool.
- You've have the *Delete iContent Files* permission to delete files.

Context

> **Note**
>
> Deleting iContent files is available only in **Production systems**. In Preview systems, you can view and access iContent files on the *iContent Management* page, but deletion isn't available.

Deleting iContent files:

- Removes the files along with any linked content objects and content packages.
- Inactivates all courses that are associated with the files. To reactivate the course, you need to manually remove the references from the course structure, make necessary changes, and revise the course.
- Resets learners progress in in-progress courses that uses these files.
- Retains the content structure of these inactivated courses by default. You can change the behavior using the `removeContentStructureOnDelete`configuration.

Procedure

1. Go to *Learning Administration* > *System Administration* > *System Management Tools* > *iContent Management*.
   The page displays the overall storage usage and the iContent files from the server linked to the Production system. It includes files from all associated environments, such as stage and preview within the same Production tenant.
2. **Optional:** Sort the order by *Last Accessed*, *File Name* or *File Size*.
3. **Optional:** Narrow down the list using one or more of the following filters:
   - *Course Affiliation*: *Inactive Courses* or *None*
   - *Environment*: *Test*, *Production*, *Staging*, and *None*
   - *Deletion Status*: *Scheduled*, *Failed*, *Deleted*, and *Not scheduled*
4. Choose the link of the file name link to view the course details affiliated with a file.
5. Review and select the files that you want to delete.
   You can select up to 2,000 files for deletion.
6. Choose *Delete*.
   The *Delete iContent Files* popup appears.
7. In *Schedule Deletion Job*, review the *Available Time Slots* link to know the available slots before you schedule it.
8. Choose a date and time.

   > → Remember
   >
   > The jobs are to be scheduled at least 30 days in advance. Once scheduled, the date and time can't be changed.

9. **Optional:** Provide a description in *Job Description*.
10. **Optional:** In *Notification*, enter an email address to receive notifications upon job completion.
11. Choose *Schedule*.

Results

A background job is created. The selected files are marked with *Scheduled* deletion status.

Next Steps

- View the background job information from *System Administration* > *Background Jobs* for tracking and managing scheduled jobs.
- Add or delete more files to the deletion job before it begins.

Related Information

Background Jobs Summary Tab [page 1239]

20.7.6.1 Canceling Deletion of iContent Files

You can cancel a scheduled deletion job for iContent files anytime before it starts.

Prerequisites

- You've scheduled a deletion job on the *iContent Management* page.
- You've verified the background job details from *System Administration* > *Background Jobs*.
- You have the *View iContent Management* permission to access the *iContent Management* tool.

Procedure

1. Go to *Learning Administration* > *System Administration* > *System Management Tools* > *iContent Management*.
2. Choose the files that are scheduled for deletion and that you want to cancel.
3. Choose *Cancel Deletion* > *Continue* to confirm.

Results

The selected files are removed from deletion.

Related Information

Deleting iContent Files Using the iContent Management Tool [page 777]
Background Jobs Summary Tab [page 1239]

20.8 Online Content Management Configuration

Configure online content management so that your content management behaves as you want it to when administrators import content and manage content.

You typically manage online content management configuration during implementation and then you review it periodically.

20.8.1 Identifying Content Servers for Online Courses

You identify content servers for your online courses so that administrators have a target server when they upload content.

Prerequisites

Although it isn't technically required, consider setting premium content management entitlement to run in SAP SuccessFactors Learning.

Context

If you have copies of online courses locally and you want to make them available to users on the web, then you create content deployment locations. Content deployment locations are target servers: servers where you can upload your content.

Many customers have a single content deployment location: an premium content management server. During implementation, a partner sets up the premium content management content deployment location. If this is your situation, then you probably don't need to work with content deployment locations.

> **Note**
>
> Content deployment locations don't apply to Online Content Network (OCN) because there's nothing to upload. OCN courses already exist on your OCN partner's website.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *Content Deployment Locations*.
2. Choose *Add New* to add a new content server or search for an existing one that you want to edit.

3. Complete the fields to identify the content server.
4. Choose *Apply Changes*.

   The system attempts to log in to the content server using the information you provide. If it can't log in, you can't complete set up of the content deployment location.

Next Steps

After you set up content deployment locations, administrators can import content to it.

20.8.1.1 Content Deployment Locations Fields

Content deployment location fields configure servers where you deploy learning content.

In *System Administration* > *Configuration* > *Content Deployment Locations*, you can select a content deployment location to which you can import files. This tool allows you to select a location with a name that is easily understandable when importing content such as videos and web pages. All content uploaded to the specific deployment location inherits all of the properties that you have set for content deployment locations.

To use this tool, you must have the following permissions:

- Add Content Deployment Location
- Delete Content Deployment Location
- Edit Content Deployment Location
- View Content Deployment Location

Content Deployment Locations

This field...	...is used as follows
Description	Because the content of this field doesn't appear in the user interface or any reports, we recommend that you use the field to fully explain to other administrators the purpose for creating this entity.
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.
Host Name and Port	The location that SAP SuccessFactors Learning deploys the content to.
User Name and Password	The logon information for the deployment server.
URL Prefix	The prefix that starts all content paths in the content. For example, the content can be stored in a directory called `data/the_content`, but users are directed to `the_content`. In this case, `the_content` is the URL prefix.

This field...	...is used as follows
Directory	The directory that the content is stored in. For example, the content can be stored in a directory called `data/the_content`, but users are directed to `the_content`. In this case `data/the_content` is the directory.
Test User	A test user is a standard user account that is associated with a content deployment location. You set up the test user in *System Administration* > *Configuration* > *Content Deployment Locations*. Later, when you import content to the content deployment location in *Content* > *Import Content*, you can assign the content to the test user to verify that the content uploaded correctly. For example, you can create a user called **PCS Test** and add the account to the *Test User* box in the premium content management content deployment location. Then, each time you import content to premium content management with the *Import Content* tool, you can create a learning item for content and assign the learning item to **PCS Test**, then log in as **PCS Test** to launch the content to make sure that it imported properly.
Location Type	The location type is way to categorize the deployment locations.
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.
iContent Deployment	Select *iContent Deployment* to send an email to the server owner. The notification helps the content server owner manage connections. SAP SuccessFactors Learning sends an email message to the person that you specify in `IContentNotificationEmailAddress` in *System Administration* > *Configuration* > *System Configuration* > *CONTENT IMPORT*. For example, if you use iContent, you can manage authentication (“entitlement”) on the LMS side. This improves performance by removing a bottleneck at the content server, but it works only with iContent: when SAP SuccessFactors Learning can know both ends of the transaction.
Contact Email	This is the administrator who is responsible for the content deployment location.
Display Order	The display order controls the order in which the content deployment locations appear when using the import wizard.
Comments	This is comments about the content deployment location.

20.8.2 Setting AICC Max Normal Default

Set AICC Max Normal value to set a default control how many content objects can be open for credit at one time in a learning item.

Context

AICC Max Normal represents the maximum number of content objects that a user can access without completing it and receiving credit for it. If a user accesses a subsequent time that exceeds that number then the content object will not grant credit. When the number of incomplete content objects exceeds the Max Normal value, subsequent launches of AICC content are set with `credit="no credit"`. AICC `Lesson_Status` and `Score` values cannot be updated.

New courses (learning items) get the AICC max normal value from *Global Application Settings* by default when you create new learning items. Individual courses can override the default. Imported AICC courses can set their max normal values in the CRS definition.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *Global Applications Settings*.
2. Set the default value in *AICC Max-Normal*.
3. Click *Apply Changes*.

20.8.2.1 AICC `Max_Normal` Inheritance

You set the default AICC `Max_Normal` in *Global Applications Settings*, but you can also override the default on the course (learning item) level.

You set the default `Max_Normal` in *System Administration* > *Configuration* > *Global Applications Settings* > *AICC Max-Normal*, but you can override it in individual courses. The override can be populated in one of these places:

- You can set the value of `Max_Normal` in *Learning Activities* > *Items* > *Online Content* > *Settings* > *AICC Max-Normal*.
- When you import an AICC course in *System Administration* > *Tools* > *AICC Import*, you can set `Max_Normal` in the CRS import file.

20.8.2.2 AICC `Max_Normal`

The AICC `Max_Normal` value is the maximum number of assignable units (content objects) that may be taken for credit simultaneously.

AICC Max Normal represents the maximum number of content objects that a user can access without completing it and receiving credit for it. If a user accesses a subsequent time that exceeds that number then the content object will not grant credit. When the number of incomplete content objects exceeds the Max Normal value, subsequent launches of AICC content are set with `credit="no credit"`. AICC `Lesson_Status` and `Score` values cannot be updated.

For example, if an item has five content objects and the max normal value for the item is set to three, then a learner can access up to three content objects without completion. If they access and don't complete a fourth content object, any AICC content object they access is launched with `Credit="No Credit"`, and the `Lesson_Status` and `Score` values are locked.

The completion value used for the max normal calculation is a SAP SuccessFactors calculation, not an AICC calculation. As a result, the Max Normal calculation is based on all content objects in an item whether they're AICC content objects or not (this also includes exam objects). However, only AICC (and SCORM) content objects are affected if the Max Normal value is exceeded.

We recommend that you set AICC Max Normal to 99.

20.8.3 Setting AICC Wrapper Confirmation Text

Set the AICC wrapper confirmation text that you want to appear to learners as the buttons and text to agree with content or disagree with content.

Context

Some online content uses an AICC wrapper. An AICC wrapper presents the user with some text and then asks the user to agree or disagree with the content object. For example, you can wrap a Standard Operating Procedure (SOP). Users read the SOP and then see some text that says that they confirm that they've read and understood it. They then click an agreement or a disagreement button. The settings control the text that users see.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Configuration* > *Global Applications Settings*.
2. In the page, find *AICC Wrapper Settings*.
3. Type new values for the confirmation prompt, and the agree and disagree buttons.

Choice	Description
Confirmation Text	The text that explains their task. Do they agree that they have read and understood the material, for example, or do they not agree?
Agree Button Text	The text that appears on the affirmative button: the button that users click when they agree that they have read and understood the material.
Disagree Button Text	The text that appears on the dissension button: the button that users click when they disagree that they have read and understood the material.

4. To translate any of the values click .

   When you click , you can translate your text into multiple locales.
5. Click *Apply Changes*.

Related Information

When and How to Use the AICC Document Wrapper [page 664]
Creating Content That Users Can Confirm Reading [page 661]
Using the External AICC Wrapper to Create Confirmation Statements [page 662]
Changing Internal AICC Wrapper Text Confirmation Text [page 663]

20.8.4 Mapping AICC Status to SAP SuccessFactors Learning Completion Status

If you're using AICC (Aviation Industry CBT Committee) content and tracking completion system, then you must map the AICC status values to your SAP SuccessFactors Learning completion status values.

Prerequisites

Before you can map AICC status values to SAP SuccessFactors Learning status values, you must set up your SAP SuccessFactors Learning completion values and your training sources. During implementation, you define completion status in *References* > *Manage Users Learning* > *Completion Status* and sources in *References* > *Learning Activities* > *Sources*.

Context

The AICC file applies to you only if you're launching AICC (Aviation Industry CBT Committee) content and tracking completion. Typically, AICC users are training in the aviation space (pilots, flight attendants, and so on). If you have AICC content, then you need to set up the mapping between the SAP SuccessFactors Learning completion status and the AICC completion status so that, when users complete an AICC course, and their completion is reported from the AICC content according to AICC completion codes, they get the correct completion status in SAP SuccessFactors Learning.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *AICC*.
3. Copy one of the case sensitivity properties and paste it at the end.

   For example, copy `lessonStatusMapping.ContentBuildCompany[Sample].ignoreCase=true` and paste it at the end.
4. Copy one of the existing vendor status codes and paste it at the end.

   For example, copy `lessonStatusMapping.ContentBuildCompany[Sample].vendorStatus[C]=P` and paste it at the end.
5. Change the bracketed value of the build company to the name of the source as defined in *References* > *Learning Activities* > *Sources*.
6. To ignore the case of the source, set `ignoreCase` to `true`.

   We recommend that yous set it to `true`.
7. In vendorStatus, set the value that comes from the source in the brackets and the matching SAP SuccessFactors Learning source on the right side of the equals sign.
8. Copy the `vendorStatus` line and paste a new one for every possible status code that could come from the vendor and then repeat the process of adding the vendor status in brackets and the SAP SuccessFactors Learning status on the right side of the equals sign.
9. Click *Apply Changes*.

Example

In this example, codes of c and C (case insensitive) from the fictitious company ABCinc map to the completion status of Pass (P) in SAP SuccessFactors Learning.

Sample Code

```
lessonStatusMapping.ContentBuildCompany[ABCinc].ignoreCase=true
lessonStatusMapping.ContentBuildCompany[ABCinc].vendorStatus[C]=P
```

20.8.4.1 AICC Completion Status Logic

SAP SuccessFactors Learning looks for specific information and follows defined logic when saving a completion status based on a code sent from AICC (Aviation Industry CBT Committee) content.

AICC vendors, tools, and sources can create different alphanumeric codes to represent the five AICC status values. A particular build company, tool, and source combination can send a value of 1 for Pass and 2 for Complete (for example). As a result, when a learning administrator creates an AICC content object in *Content* > *Content Objects*, the object needs the build company, build tool, and learning source so that it can find the alphanumeric code.

SAP SuccessFactors Learning uses the information in the content object to find the origin of the incoming code from the AICC content. This origin is defined in brackets in the AICC system configuration file. For example, in the following code, the origin is the string `SKILLSOFT`:

```
lessonStatusMapping.ContentBuildTool[SKILLSOFT].vendorStatus[C]=P
```

To find the origin, SAP SuccessFactors Learning looks for matches in the following order. First it tries to match build company from the content object to the bracketed origin in the AICC file. If it can't match an origin in build company, it looks at build tool. If it can't find a match in build tool, it looks for a match in learning source.

1. Build Company: Assigned on the Summary tab of Content Object.
2. Build Tool (Developer Tool): Assigned on the Summary tab of Content Object.
3. Learning Source: Assigned in the *Source* list in *Learning Activities* > *Items* > *Summary*. Source is an enumerated list that you manage in *References* > *Learning Activities* > *Sources*.

As part of the matching, SAP SuccessFactors Learning looks at the value of `ignoreCase`. If set to `true`, then matching ignores case (Not case sensitive).

20.8.4.2 AICC Completion Status Map

The map between AICC (Aviation Industry CBT Committee) content completion and SAP SuccessFactors Learning completion defines how our Learning Management System (LMS) stores completion based on a status coming from AICC content.

Create an AICC Completion status map so that when users complete an AICC course, and their completion is reported from the AICC content according to AICC completion codes, they get the correct completion status in SAP SuccessFactors Learning. The LMS receives a status from the AICC content vendor. Based on your map, it gives the user the correct Finished or Complete status:

- Finished: The user has viewed but not necessarily mastered the material.
- Complete: The user has earned credit for mastery.

Sample AICC Status Map

AICC Status	SAP SuccessFactors Learning "Finished"	SAP SuccessFactors Learning "Complete"
Pass	True	True
Complete	True	True

AICC Status	SAP SuccessFactors Learning "Finished"	SAP SuccessFactors Learning "Complete"
Failed	True	False
Incomplete	False	False
Not Attempted	False	False

When you look at the example map, you see that when AICC marks a user as Pass, the user is marked as both Finished and Complete in SAP SuccessFactors Learning. If AICC marks the user as Failed, then to SAP SuccessFactors Learning, the user has finished the content (gone to the end) but hasn't completed (mastered) the content. If the user hasn't attempted the content, then the user has neither finished it (gone to the end) nor completed it (mastered it).

The relationship between AICC status and SAP SuccessFactors Learning Administration status requires that only an AICC status of **Pass** earns a SAP SuccessFactors Learning Administration status of **Complete**. When a user earns an AICC status of Pass, the user must earn a SAP SuccessFactors Learning status of Complete.

> **Note**
>
> The AICC status of Complete is Finished in SuccessFactors Learning Administration but not Complete. For the SuccessFactors Learning Administration status, the user must pass the content for it to be considered Complete.

20.8.5 Cross Domain Support Properties

Cross Domain Support (CDS) properties are set during the CDS implementation process.

Edit these properties in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*.

Property	Description
`cookieCrossDomainSupportEnabled`	Set `cookieCrossDomainSupportEnabled` to true to enable cookie cross domain support. Cookie cross domain support is used to support launching and tracking courseware from a different domain than the application domain. The application and the content server must share the top-level domain for cross domain tracking to be successful. An application server with domain tms.learning.com and a content server with domain cms.learning.com share the top-level domain: "learning.com." If you set to true, you must also set a value for the `cookieCrossDomainSupportDomainName` property.

Property	Description
`cookieCrossDomainSupportDomainName`	The `cookieCrossDomainSupportDomainName` contains the top-level domain when you're using cookie cross domain support (when `cookieCrossDomainSupportEnabled` is set to true). For example, if application has the domain tms.learning.com and your content management server has the domain cms.learning.com, then the value of the `cookieCrossDomainSupportEnabled` property is learning.com.
`communicationCrossDomainSupportEnabled`	When set to true, the `communicationCrossDomainSupportEnabled` property enables communication cross domain support, which uses an API wrapper to make possible cross-domain communication between SAP SuccessFactors Learning and a content management server.
`defaultContentServerPath`	The `defaultContentServerPath` property contains the default value for the URI where you store your online content. Administrators can change this. For example, you can type the root and allow administrators to type in their subfolders for different learning items.
`contentWrapperPageName`	The name of the wrapper frameset that loads SAP SuccessFactors Learning courseware APIs and training content.
`lmsSessionId`	The `LmsSessionId` property is used when proxlet.war is deployed to support cross domain SCORM content. It allows SAP SuccessFactors Learning to authenticate the request from the proxlet. The default setting is jsessionid, and you shouldn't change it without assistance from SAP SuccessFactors Technical Services.
`scorm2004ContentWrapperPageName`	The scorm2004ContentWrapperPageName property contains name of the wrapper frameset that loads SCORM 2004 courseware APIs and training content.
`externalURLQuestionWrapperPageName`	The `externalURLQuestionWrapperPageName` property contains the name of the wrapper frameset that loads exam question APIs and exam content. The exams must be configured to work with SAP SuccessFactors Learning Administration.
`contentOpenerPageName`	The `contentOpenerPageName` property contains the name of the page that loads the courseware APIs. Unlike the wrapper page, the opener page opens the actual training content in a new window.

Property	Description
`defaultProxletPath`	The `defaultProxletPath` property contains the default value for the communication proxy loaded on the content server. Administrators can override this value in the Cross-Domain tab of the content object or question record.

20.8.6 Online Learning Content Management Configuration Properties

We include general online learning properties that you can set in LMS_ADMIN. General online learning properties enable online learning functions that apply broadly across online learning.

Edit these properties in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*.

Property	Description
`aiccSecurityEnabled`	To enable security in AICC learning transactions, set the `aiccSecurityEnabled` property to true. AICC security prevents, for example, users from stealing a session by copying a URL.
`contentTestPagesEnabled`	Set the `contentTestPagesEnabled` property to true to allow some online learning test pages to run without going through the normal check-login routine. Enable test pages in only test environments because when you set to true, the system circumvents its login checks. This setting is exposed for SAP SuccessFactors Technical Services. We recommend engaging them for help with online learning.
`userIdentityInformationCookieEnabled`	Some third-party learning content, when served online, requires the user's ID in a cookie. If your content requires the user ID to be stored in a cookie, then set the `userIdentityInformationCookieEnabled` property to true.

Property	Description
`removeContentStructureOnDelete`	The configuration determines whether deleting iContent files using the *iContent Management* tool also removes the content structure from its linked courses. The default value is set to false. • When set to false, deleting files retains the content structure in all associated courses. You need to manually remove the deleted content from the structure and reactivate the course. • When set to true, deleting files automatically removes the content structure from all associated courses. While the remaining content is still accessible, it is no longer linked to the course. → Remember Changing the content structure doesn't trigger the revision wizard, regardless of the configuration setting.

20.8.7 Online Learning URL Properties

This topic describes how you can control how the browser and user interact with online learning.

Edit these properties in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*.

Property	Description
`aiccReturnURL`	The `aiccReturnURL` property is mapping to the `PwsAiccServlet`, which tracks the completion of external AICC content through HTTP messages.
`contentTrackingFunctionReturnURL`	The `contentTrackingFunctionReturnURL` property contains the mapping to the `PwsTrackingFunctionsServletServlet`, which tracks the completion of structured content through HTTP messages.
`scorm2004ReturnURL`	The `scorm2004ReturnURL` property contains the mapping to the SCORM 2004 RTE servlet, which tracks the completion of structured content through HTTP messages.
`examQuestionReturnURL`	The `examQuestionReturnURL` property contains the mapping to the PwsStudentExamAPI. The exam questions send HTTP messages to this URL.

Property	Description
`examResourceCacheMaxCount`	The `examResourceCacheMaxCount` property contains the number of resources to be cached by the `PexamResourceServlet`.
`restrictAccessToOtherComponentObjectsDuringExam`	The `restrictAccessToOtherComponentObjectsDuringExam` controls whether users can access other objects (like learning items) during an exam.

20.8.8 CONTENT IMPORT System Properties File

The CONTENT IMPORT system properties file controls some of the default configuration for the content importer.

> ⓘ Note
>
> In SAP SuccessFactors Learning, attachment limits are spread across three system configuration files: *ATTACHMENT*, *CONTENT IMPORT*, and *LMS_ADMIN*. You can edit all the files by going to: *System Administration* > *Configuration* > *System Configuration*.

These settings apply to the content import tool: *Content* > *Import Content*.

Property	Description
`maximumFileSizeKB`	`maximumFileSizeKB` is the maximum size of a file, in KB, that an administrator can upload from the content import tool. Set this to a value that protects your content server and that is reasonable for your types of online course content.
`handlerTimeout`	This is the time-out, in milliseconds, for the import handler. You want it to time out before the administrators' session, so make it less than the server time out.
`IContentNotificationEmailAddress`	This is an email address that receives issues related to premium content management uploads. Note that this is in addition to emails sent to the administrator uploading the content.
`supportedFileExtensions`	The list of file extensions supported by bulk content import tool. This applies to individual files or files in a zip file that isn't AICC or SCORM format. Each item in the list must be separated by a semicolon (;). Don't include additional spaces or characters. If an administrator attempts to upload individual files, or files in a zip file that isn't AICC or SCORM format, with an extension that **isn't** on the list in `supportedFileExtensions`, then the import stops and the administrator sees a warning about file types.

Property	Description
`unsupportedFileExtensionsInZipFiles`	If an administrator attempts to upload an AICC or SCORM format zip file with an extension that **is** on the list in `unsupportedFileExtensionsInZipFiles`, then the import stops and the administrator sees a warning about file types.
`backgroundThresholdFileSizeKB`	Set `backgroundThresholdFileSizeKB` to a reasonable limit to avoid locking your administrators while they are using the content import tool. If administrators attempt to upload a file that is over this threshold (in KB), then they must run the import as a background job. By offloading the job to the background, they can continue to do other work while the file uploads.

Related Information

Configuring Attachment Logic and Limits in SAP SuccessFactors Learning [page 1041]

20.8.9 OPEN CONTENT NETWORK System Property File

After you sign agreements with content providers, you configure the Open Content Network to connect SAP SuccessFactors Learning to the provider.

Enabling the System and the Providers

General properties for third-party providers

This property...	...Is Used As Follows
`providers[<specific provider name>].*`	Do not change any value for a property that starts with `providers` unless you are directed to so so by a SAP SuccessFactors Learning representative. There are two exceptions to this rule, and they are described in the rows below.
`providers[<specific provider name>].enabled`	By default, all providers are disabled (this property is set to **`false`**. Set to **`true`** to enable the provider after you sign an agreement.

This property...	...Is Used As Follows
`providers[<specific provider name>].pricingModel`	`providers[<specific provider name>].pricingModel` determines the pricing model of the provider. Valid values are: • A value of **`null`** means that the provider falls back on whatever pricing you have configured in Finance or falls back on free courses. If you want to use OCN with SAP SuccessFactors Learning Finance, then type **`null`**. If you plan to offer all courses for free, type **`null`**. • If you want to publish the price of an OCN course on users' catalogs and allow them to pay for it a la carte from the OCN provider, type **`RETAIL`**. The provider must have an a la carte option. Companies can use this, for example, if they tell users to charge the course to a credit card and submit it in an expense report. The transaction takes place outside SAP SuccessFactors Learning, but we do show the pricing information so that users can make informed decisions. You cannot use Finance if you select a retail model. • If you signed up under a provider's subscription model, type **`SUBSCRIPTION`**. Subscription models vary, but users under a valid subscription are allowed to take the course. Billing takes place under your provider's subscription agreement. You cannot use Finance if you choose a subscription model.
`providers[PROVIDERID].libraryID=LIBRARY_ID`	Enter an active library ID in the property and add it to the relevant Open Content Network (OCN) provider to auto-assign OCN item that you import—either manually or through auto-import—to the configured library. **Note** Items available for import in *Content* > *Open Content Network* are added to the default library only if they're imported after the library configuration is set. Items imported before configuration remain in the libraries to which they were initially added.

Properties specific to OPENSESAME provider

This property...	...Is Used As Follows
`providers[OPENSESAME].config.appKey`	OpenSesame requires a tenant ID, an app key, and a secret key. With an OpenSesame account, you can retrieve the information at https://www.opensesame.com/OCN

This property...	...Is Used As Follows
`providers[OPENSESAME].config.secretKey`	OpenSesame requires a tenant ID, an app key, and a secret key. With an OpenSesame account, you can retrieve the information at https://www.opensesame.com/OCN
`providers[OPENSESAME].config.tenantID`	OpenSesame requires a tenant ID, an app key, and a secret key. With an OpenSesame account, you can retrieve the information at https://www.opensesame.com/OCN

Setting Default Import Values

When you import content from a provider to SAP SuccessFactors Learning, each course becomes a learning item in your system. The following properties define the default values when the system creates the learning item. The default values are the recommended values for most customers (the most common configuration case). The provider ID is a part of the provider's configuration such as `providers[OPENSESAME].enabled=false`.

This Property...	...Is Used as Follows
`defaultValues.domainID[default]`	This value is the default security domain of learning items created from importing MOOC content. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.crossDomainEnabled[default]`	This value determines whether cross domain support (CDS) is enabled on the content. CDS is supported for Lynda only, and to use it, you must set up CDS. To set up CDS, read the *Integration - Learning and Cross-Domain Content Servers* document for your release. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.enableMobileAccess[default]`	This value is the default value for the flag that enables mobile learning access for the learning items. If you want users to access the MOOC content only through a browser on laptops, set to **`false`**. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.

This Property...	...Is Used as Follows
`defaultValues.isOnline[default]`	This is the default setting for the flag that allows users to access the learning item. If you want to import MOOC content but you want to hide it until you have a chance to review each learning item, set the value to **`false`**. To reduce your review workload, set to **`true`**. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.isApprovalRequired[default]`	This is the default setting for the flag that either requires or does not require approval to take a course. The idea of MOOC courses is that are highly available to your users, so in most cases, you should set to **`false`**. You can always set individual learning items to require approval later. Set to **`true`** to require, by default, approval to launch MOOC courses. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.processDefinitionID[default]`	If you require an approval process by default in `isApprovalRequired`, then you create a default approval process and paste the ID as the value of this property. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.isSupervisorCanRecordLearningEvents[default]`	This is the default setting for the flag that allows supervisors to record learning events on the learning item. The idea of MOOC courses is that they are highly available to your users, so we recommend setting this to **`true`**. You can always override the default value for individual learning items. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.isUserCanRecordLearningEvents[default]`	This is the default setting for the flag that allows end users to record learning events on the learning item. The idea of MOOC courses is that they are highly available to your users, so we recommend setting this to **`true`**. You can always override the default value for individual learning items.The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.

This Property...	...Is Used as Follows
`defaultValues.currencyCode[default]`	If you set up finance for MOOC content and if you do not want to use the default currency code, then provide an alternative currency code here. The currency code is the ID from *References* > *Finance* > *Currencies*. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.itemType[default]`	This is the default learning item type value for learning items created from importing MOOC content. Item type is sometimes confused with item classification. Item types are enumerated in *References* > *Learning Activities* > *Item Types*. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.itemCompletionStatus[default]`	This is the default value for completion status of the learning items created from importing MOOC content. This value is useful in two circumstances: when the value of `markCompleteOnLaunch` is set to **`true`** or when `crossDomainEnabled` is set to **`true`**. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.itemFailureStatus[default]`	This is the default value for failure status of learning items created from importing MOOC content. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.reviewable[default]`	This is the default value for the flag that enables a learning item to be reviewable. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.

This Property...	...Is Used as Follows
`defaultValues.markCompleteOnLaunch[default]`	This is the default value for the mark complete on launch flag for learning items created form MOOC content. If you are tracking completion status, we recommend you set to **`true`** in this release. The bracket default is what the system falls back to if you do not include the provider name, for example, OPENSESAME. To do so, simply copy the property and replace 'default' with your provider, for example, OPENSESAME.
`defaultValues.autoRecordAttributeRatingOnItemCompletionEnabled[default]`	This is the default value that automatically enables the option *Auto Record Competency Rating on Item Completion* for all Open Content Network (OCN) items in bulk when they are imported into Learning. You can change the value to **`false`** to disable the option for all OCN items in bulk. **Note** When the option is enabled on the *Items Details* tab of an item, completing a training with assigned attributes automatically updates the associated attributes in the Growth Portfolio.

21 SAP SuccessFactors Learning Features Supported for Content Player

Administrators can embed the SAP SuccessFactors Learning content player in their own business portals, outside of the Learning application.

> **Note**
>
> Before you begin, you need to set up your business application to allow single sign-on (SSO). In addition to the configuration, work with your business application developer to do the following:
>
> - Retrieve the embedded content player deep link from the Catalog API, Learning Plan API, or Learning History API.
> - Update content security policy settings for inline frames (iframe).

We support the following features for the content player:

- Embedding the SAP SuccessFactors Learning content player in a customer's business portal.
- Using the supported online content objects (AICC, SCORM, document type, browser) and assessments.
- Bookmarking and tracking online content in SAP SuccessFactors Learning.
- Accessing the content player through web or mobile browsers (embedding the content player in native mobile applications isn't supported).
- Accessing the content player within an iframe.
- Accessing the content player as an SAP SuccessFactors Learning user.
- Reviewing content from learning history within an embedded content player.

We don't support the following:

- Accessing the content player as a Learning-only user.
- Using e-signatures.
- Enforcing required surveys.
- Displaying warnings to users when they attempt to launch content early, already have the course in their learning history, or when there's a newer revision of the course.

22 Learning Finance

SAP SuccessFactors Learning finance tracks financial transactions within your training environment.

SAP SuccessFactors Learning finance has a set of available functions and tools that allow administrators to track resource costs incurred in the delivery of training and the tuition (pricing) charged for a user to attend or launch a training event. Finance is strictly a system that tracks transactions such as credit and debit values. There is no exchange of money in Finance without the addition of an optional eCommerce integration such as PayPal Pro.

22.1 Master Inventory

View this section if you want to know about master inventory for finance.

The master inventory stores all items and materials available in the application and sets their default price. Libraries are populated from the master inventory.

This field...	...Is Used as Follows
SKU	Stock Keeping Unit is a unique inventory ID of the selected item.
Item or Material	The name and last revision of the item or the name of the material.
Inventory Type	The inventory type of the selected item: Item or Material.
Classification	The type of classification: Instructor-led, Online, or Other. Other can include such as books or documents.
Published Price (@)	The price published for one unit of the selected item.
Cancel Policy ID	The ID of the cancellation policy for the selected item. Cancellation policies are managed in *References* > *Finance* > *Cancellation Policies*.
Available in Library	This checkbox, when selected, indicates that the selected item appears in the master library.
Class ID	The unique ID of the class.
Date/Time	The date and time of the class. The date and time appears in the time zone defined in the *Class Summary*.
Facility	The facility associated to the class.

This field...	...Is Used as Follows
Published Price	The price published in the library for the selected offering.

22.2 Adding Account Codes

Add account codes to track spending and purchases for training through chargeback.

Context

The account code is one way to track the transactions. It is a unique code created to track the chargeback information of a transaction for the ledger.

> **Note**
>
> Most customers import account codes in bulk with the account code connector.

Procedure

1. Go to Learning administration and then go to *References* > *Finance* > *Account Codes*.
2. Click *Add New*.
3. Add the summary field data.

Field	Description
Account ID	This is the unique ID of the account code. After you create the account code, you cannot change it.
Account Code	This is the account code name.
Description	Add a description that helps you understand the account code when you maintain it later.
Security Domain ID	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Account Code Type ID	This is the account code type from *References* > *Finance*. Account codes help outside systems understand

Field	Description
	the categories of transactions. Your account codes depend on how you set up your outside financial system to categorize accounts.
Company Code	The company code is a unique ID for a company in your outside financial system. The codes that you use depend on how your external system is configured.
Controlling Area	The controlling area is a unique ID for your accounting controlling area. In most cases, you have only one controlling area for all account codes. In some more complex financial systems, however, you can have more than one controlling area. Your controlling area depends on the configuration of your external financial system.

4. Click *Add*.
5. Go to *Chargeback*.
6. Click *add one or more from list* to add a profit centers for the account code.
7. Edit *Distribution* to distribute the profits among the accounts.
8. Click *Apply Changes*.

22.2.1 The Importance of Account Code Type, Company Code, and Controlling Area

If you're using finance features, you likely pull data from the transactions table, where account code type, company code, and controlling area are important categorization tools.

External financial systems need attributes to categorize transactions. The attributes help the external system categorize the transaction. You might want to see all transactions in a given company code, for example, or all transactions of a given account code type.

SAP SuccessFactors Learning doesn't use account code type, company code, or controlling area for itself. We simply make them available on the accounts. Your particular values for these three fields will depend on your external financial system.

22.3 Order Management

View this section if you want to know about order management.

Order Management (*Finance* > *Order Management*) is used to view and edit orders in the system. You see the order number, status, and the items in individual orders. You can also create refunds for a whole order or for an individual line item.

22.3.1 How to Access the Order Management Tool

You can access the order management tool by either opening the tool itself in *Finance* or by launching it from a class.

When you want to manage many orders for many courses at one time, we recommend that you launch the order management tool directly. Go to *Finance* > *Order Management*. However, you often want to manage the order of a single class. If so, you can launch the order management tool directly from the class. Open the class, then go to *Registration Financial Details*. Choose the *Order Number* to launch the order management tool.

Related Information

Approving Financial Transactions [page 805]
Fulfilling Orders [page 803]
Refunding an Order [page 804]

22.3.2 Fulfilling Orders

Mark an order as fulfilled to show that the training has been delivered.

Context

Orders move automatically between submitted, pending, approved, and (in most cases) cancelled. For many companies, it's enough to know that the order was approved. You might, however, want to reconcile the orders with fulfillment. Fulfillment is an optional step. It marks the training as having been delivered to the user in the order. You can determine, for example, that a book or video was delivered to the user.

> **Note**
>
> We don't recommend that you use fulfillment as a way to determine that a user attended the course. Instead, use completion status.

Procedure

1. Go to *Finance* > *Order Management* and look up the orders that you want to fulfill.

   Consider searching for all orders with an order status of APPROVED because an order must be approved before you can mark it as fulfilled. A search for all approved orders gives you your list of orders that can potentially be marked as fulfilled.

2. In the *Status* column, choose the *Change Status* link for the desired item.

   A *Change Order Status* page opens. You can see the order details on this page.
3. In the *Change Order Status To* dropdown list, select either Fulfilled or Cancelled.
   - Select **`Fulfilled`** if the training was delivered and you want to recognize revenue. Or, in the case of reserved seats, that the organization was granted the reserved seats in the courses.
   - Select **`Cancelled`** if the training wasn't delivered or the user didn't attend the training.
4. Choose *Apply Changes*.

Next Steps

After you approve the order, consider approving financial transactions.

Related Information

Approving Financial Transactions [page 805]

22.3.3 Refunding an Order

Refund an order when you want to return some of the cost of the order.

Context

Some refunds take place automatically. For example, a cancellation policy can refund some percentage of the cost of an order. In some exceptions, however, you might want to provide your own refund. For example, if an employee missed a course because of a family emergency, you might want to refund the total cost of the order.

Procedure

1. Go to *Finance* > *Order Management*
2. Search for the order that you want to refund and click its *Edit* button.
3. Click the *Add Refund* link on the individual line items of the order or to refund the entire order, click the *Add Refund* button.

   The order level refund button is visible when you have access to all line items in the order. If you do not have security access to a line item in the order, then you must add the refund to each line item.

Next Steps

Consider changing the fulfillment status of the orders that you refund. If you refund 100% of the cost, for example, chances are that the status should be Cancelled.

Related Information

Fulfilling Orders [page 803]

22.3.4 Approving Financial Transactions

Approve financial transactions in SAP SuccessFactors Learning to indicate that you can recognize revenue from the transaction.

Prerequisites

Before you can approve financial transactions, their orders must be at least in the approved status. This means that users are enrolled or that the organization is approved to hold the reserved seats in training. Think of the approved order state as a user's approval to enroll into the course. Your approval of financial transactions, however, is the approval for how the user wants to pay for the course.

Reconcile the orders as fulfilled before approving financial transactions in the orders.

Context

Approve financial transactions to indicate that you can recognize revenue from the transaction. This is useful if you export SAP SuccessFactors Learning finance data to a third-party system.

Procedure

1. Go to *Finance* > *Order Management* and look up the order that you want to investigate.
2. Choose the *Edit* button.
3. Go to *Financial Transactions*.

   You don't necessarily see all financial transactions in the order. You see only those financial transactions that you're approved to see given your security settings.
4. For each financial transaction that you want to approve, select *Approve*.

Related Information

How Orders and Transactions Fit Together [page 809]
The Purchasing Process for Orders of Learning Courses [page 810]
How Domain Restriction Works for Financial Transactions [page 808]

22.3.5 Canceling a Learning Order by Order ID or Purchase Order ID

Cancel a Learning order by order ID or purchase order ID when you know one of the IDs but you don't know the class that matches the order.

Context

When you want to cancel an order, you sometimes know the order or the purchase order ID, and you sometimes know the class but not the order information. If, however, you know the class, you can cancel the order as part of registration changes. When you remove the learner from the registration list, you have an option to edit their registration and canceled.

Procedure

1. Go to Learning Administration and then go to *Finance* > *Order Management*.
2. Find and edit the order.

   For example, if you know the order ID, you can search by the order ID to find the order.
3. In the *Status* column, click *Change Status*.
4. In *Change Order Status To*, select *Cancelled*

22.3.6 Creating a Purchase Refund

View this section if you want to know about creating a purchase refund.

You can create refunds for the whole order or for an individual line item.

Order Refunds and Line Items Refunds

There are two kinds of refunds that you can create:

- Order Refunds: This is a refund that is deducted from the entire order total.
- Line Item Refunds: This refund deducts a given amount from the cost of a single line item. For example, if there is an order for three classes and one is canceled you would perform a line item refund for that item. You can override the cancellation policy assigned to the class by entering a different refund amount. The Cancellation Policy is the set of rules used by the system to calculate what the user is charged upon canceling the class of an entry or activity.

You can change the Cost Center and Profit Center for an ORDER REFUND but you cannot make those changes for a LINE ITEM unless you make adjustments in the ORDER REFUND first. Then the changes are automatically applied to the line item.

Refund Amount Limitations

There are limitations on refund amounts.

- A maximum order refund is calculated in the following way:

1. Add all (non-refund) line item prices.
2. Subtract all line item and order refunds from the total calculated in the previous step.

- A maximum line item refund is calculated in the following way:

1. Subtract all the line item refunds from the item price to have the line item total
2. Select least amount from the max order refund and the maximum line item refund.

Refund Rules

The following is a list of rules you must follow in order to perform a refund:

- You can create a refund only if the Order Status is Approved, Fulfilled, or Cancelled.
- The refund amount cannot be less than or equal to zero.
- In the case of an order refund, the total refund amount cannot exceed the order total.
- In the case of a line item refund, the line item refund amount cannot exceed the current line item total or the current order total, whichever is lower.
- The Refund Amount is editable if the Transaction Type is “Chargeback”.

22.3.7 When Financial Transactions are Created

In general, SAP SuccessFactors Learning creates financial transactions when the order is approved. Credit cards are an exception.

In general, financial transactions appear in orders when the order is approved: if an order is pending or submitted, no financial transactions are created. However, in when an order is made with a credit card, we create a financial

transaction when the order is submitted. When the order is in the submitted or pending state, the credit card financial transaction tracks the authorization to the credit card.

The authorization to the credit card is a hold put on the card for the amount of the order. The authorization is similar to a deposit put on the training: if the order is canceled, then no money is charged to the credit card. If the order is approved, a second financial transaction appears on the order to track the actual charge to the user.

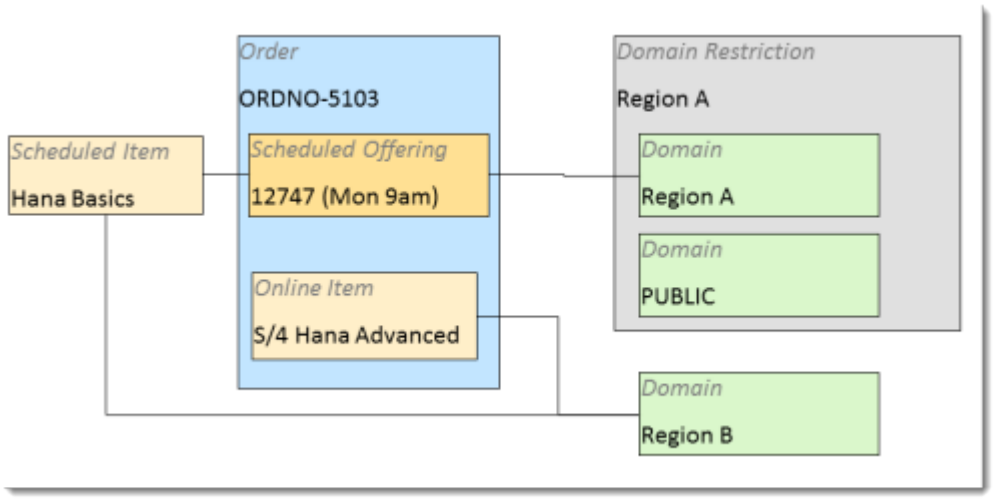
Authorizations are only valid for a set period of time. It varies by credit card, but, for example , an authorization can be valid for 30 days. At the end of 30 days, the authorization expires. If the authorization expires before the SAP SuccessFactors Learning order is approved, it creates a new order with a new authorization.

22.3.8 How Domain Restriction Works for Financial Transactions

In SAP SuccessFactors Learning, financial transaction security is attached to the domain restriction of learning items and classes.

When administrators open an order and begin the process of approving financial transactions, they can only see financial transactions for learning items or classes that have domains that match their domain restriction settings. The financial transaction itself does not have a domain restriction.

For example, you might configure your system so that administrators are responsible for financial transactions for a region. In this case, you can create domains for Region A and Region B. If a user orders courses from both Region A and Region B, the order has mixed financial transactions. When the administrator for Region A logs in and looks at the mixed order, he or she sees all the financial transactions for courses in Region A and PUBLIC. When the administrator for Region B logs in and looks at the mixed order, he or she sees all the financial transactions for courses in Region B and PUBLIC.



Domain Restrictions on Financial Transactions

22.3.9 How Orders and Transactions Fit Together

Orders are a single purchasing action and financial transactions are the actual purchases within that action.

An order is a single purchase of learning, but the individual reserved seats, learning items, or classes are treated as separate financial transactions. For example, if an external user logs into a site and orders three classes, the system creates one order and three financial transactions.

The system creates multiple transactions in a single order because each reserved seat, learning item, or class can have different settings. They also might each require different approval. A user might order three classes at once but might only be approved for one of them. Each learning item or class can also belong to a separate security domain and require special access to approve. An administrator might have access to approve financial transactions in Region A but not Region B, for example. A user, however, might order classes from both Region A and Region B.

22.3.10 Order Management System

Use the SAP SuccessFactors Learning order management system to control purchases made by internal and external users.

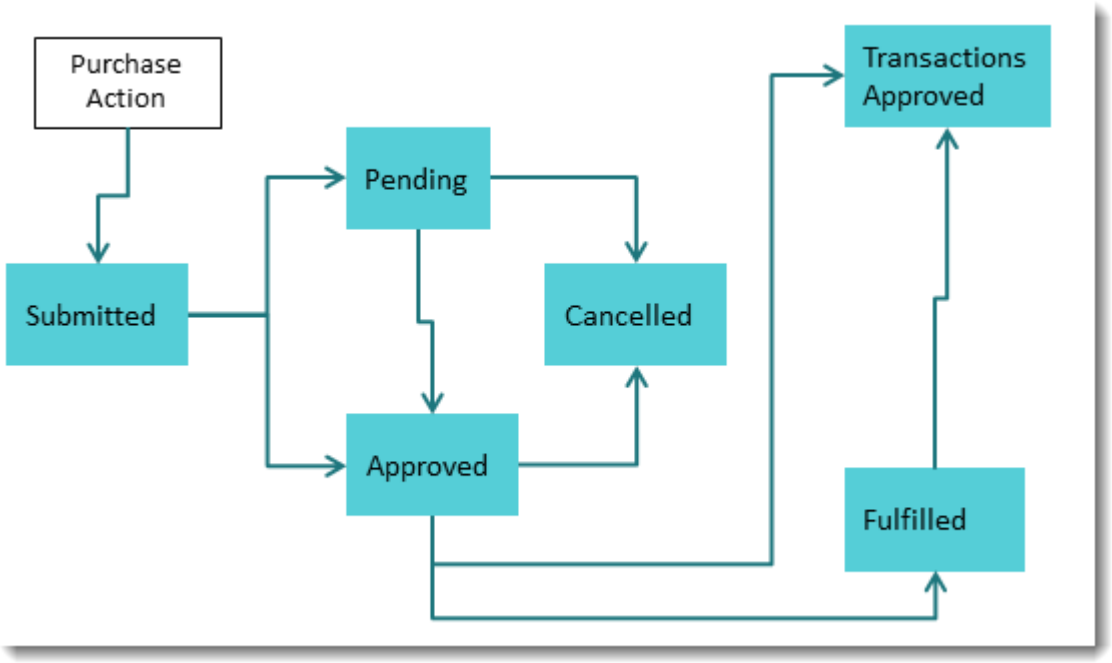
The SAP SuccessFactors Learning order management system provides control and structure to purchases made on your Learning Management System (LMS). When users purchase learning, we create an order. The order goes through the purchasing process to provide traceability in the enrollment process through your reconciliation process.

The order management system is made up of:

- An order: This is the primary unit of the order management system. When you want to know the state of the purchasing process for one purchasing action (for example, a user purchasing a learning item) you look up the order.
- A financial transaction: This is the actual purchasing mechanism of the order. The financial transaction can vary based on the purchasing method (for example, credit card).

22.3.11 The Purchasing Process for Orders of Learning Courses

When users of Learning order courses, they follow a purchasing process that moves the order from submitted to fulfilled.



SAP SuccessFactors Learning Order Management Process

Purchasing Action

When a user, manager, or administrator takes a "purchasing action," SAP SuccessFactors Learning creates an order with an order number. A purchasing action can be, for example, an administrator reserving seats for users of an organization or a manager submitting a request for a user to attend a course. The distinguishing feature of a purchasing action is that it costs money and that cost must be guided through a process.

> **Note**
>
> Users see *Buy Course* as the action for items that require a purchasing action. If the item also requires approval, users see *Request Approval* as the action.

Submitted Status

When the order is created, it is in the Submitted status. Often, the order passes through the submitted status quickly.

Pending Status

An order becomes Pending if it can't immediately be consumed. For example, a user might need approval to enroll into a class or the class might be full and the user is waitlisted.

> **Note**
>
> In the Pending state, credit card transactions are authorized but not charged. If the authorization expires before the order can leave the pending state, a new order is created.

Approved Status

An order becomes Approved from either the Submitted state or the Pending state.

- If an order is Pending, and the order is approved either implicitly (the user moves from the waitlist and becomes enrolled) or explicitly (a manager, for example, approves the order), the order becomes Approved.
- If an order is Submitted and doesn't need approval, it skips the pending step and becomes Approved. Examples of orders that don't need approval:
  - A user enrolls into a class that has room and doesn't need approval for enrollment.
  - The order is for an online learning item that doesn't require approval and the user launches the content of the learning item.
  - An administrator orders reserved seats for an organization.
  - A user applies a voucher (which is a way of preapproving the order).

Cancelled Status

An order becomes Cancelled when the transaction can't take place. For example, a user withdraws from a course or isn't approved to enroll. Administrators with access to *Finance* > *Order Management* and the order can also manually set a fulfilled order to cancelled. For example, they might see that although the user was listed as enrolled, the user didn't actually attend the course.

Fulfilled Status

An order becomes Fulfilled when an administrator with access to the order (*Finanace* > *Order Management*) marks the order as fulfilled. This is an optional step that allows you to reconcile your costs. The reconciliation happens outside SAP SuccessFactors Learning.

22.3.12 SAP SuccessFactors Learning Orders

SAP SuccessFactors Learning orders are the vehicle for purchases in the Learning Management System (LMS).

When a user attempts to enroll into a learning item or class, and it has a price, SAP SuccessFactors Learning creates an order. In SAP SuccessFactors Learning, a learning item, or class has a price if:

- The price of the item or class is greater than zero.
- The chargeback method is something other than “No Charge.”

You can see the orders in the system if you go to *Finance* > *Order Management*. Each of those orders is a purchase of a learning item that has a price.

Purchasing is a process that begins with a user (or a manager or an administrator) buying something and ends with your company recognizing fulfillment. Between the start and finish, the purchasing process can take multiple routes. The order is the vehicle that follows the purchasing process routes.

> ⓘ Note
>
> An order **isn't** created when an item is assigned to a user's learning plan. An order is only created when the user enrolls in the class or begins the assigned item.

22.3.13 Why Avoid Adding Learning Order Statuses

Use the default order status values: Submitted, Pending, Approved, Fulfilled, and Cancelled because these status values are critical to the standard order management process. Create new order status values only if you’re defining a new process, which usually happens with custom development.

You can see the order status values in *References* > *Finance* > *Order Satus*. You might want to change the *Description* field of the default values so that it matches your business, but otherwise, we recommend that you don’t change them.

When you create a new order status, you assign the status one of the following order status types: submitted, approved, pending, cancelled, and fulfilled. Any new order status you create is available to administrators in Order Management.

22.3.14 Order Management Summary Fields

View this section if you want to know about the *Order Management Summary* tab.

The *Summary* tab (*Finance* > *Order Management* > *Summary*) contains the status and contents of the selected Order ID.

This field...	...Is Used as Follows
Order Type	The system has five order types: SEAT-ENROLL, SHOPPING-CART, SLOTTING, EVHST, and INTERNAL. • SEAT-ENROLL-Orders placed through registration into a class. • SHOPPING-CART- Orders placed using the shopping cart. • SLOTTING: Orders placed by the purchase of reserved seats. Like organizations, groups have a finance association to allow for a reserved seat finance purchase. • EVHST: Orders created by the history record editor. • INTERNAL: Order placed by internal users.
Order Status	Current status of the line item. You can create a new order status (*References* > *Finance* > *Order Status*). To change the status, choose *Change Status*. You can also remove a refund from an item by choosing the *Remove Refund* link in the *Status* column.
Shopping Account	The account to be charged for the order.
Course Details	The course that has been ordered.
Class Details	The class that falls under the course that has been ordered.
Qty (Quantity)	The quantity of items in the order.
Original Unit Price	The price per unit of the item in the order. Choose *Add Refund* to add a refund to the item.
Final Unit Prices	Total price per unit of the item in the order.
Extended Price	The first row of this column displays the price for the entire order. All other rows display the number of refunds for the corresponding line item and for the entire order.
Charged Amount	The charged amount is the amount that was actually charged for the order. Pending order, for example, appear with a zero (0.00) charged amount when a user is on the waitlist or registration approval is pending and the charged amount is still zero.
Cost Center	The account code debited in the transaction. To change the cost center, choose *Change Cost Center*. Like organizations, groups have an account code association to allow for reserved seat commerce purchase validation.
Profit Center	The entity/account credited in the transaction. To change the profit center, choose *Change Profit Center*.

This field...	...Is Used as Follows
Add Refund (link)	Use this link to make a refund to a line item. • Price Paid: The paid cost of the order. • Additional Refund Possible: This is the grand total and therefore the maximum amount for which you can make a refund. • Refund Amount: The amount you wish to deduct from the Price Paid as a refund for a line item. • Comments: In the text box, you can include comments regarding the refund.
Add Refund (button)	Choose the *Add Refund* button to add a refund for the entire order. • Order Total: The total amount for the order. • Refund Amount: The amount you wish to deduct from the Order Total as a refund for the entire order. • Comments: In the text box, you can include comments regarding the refund. • Cost Center: May be provided based on line items on the order but the administrator can change it. Choose the *Cost Center* link to add an account code. When one or more account codes have been added, you can edit the Account Code Distribution list. • Profit Center: May be provided based on line items on the order but the admin can change it. Choose the *Cost Center* link to add an account code. When one or more account codes have been added, you can edit the Account Code Distribution list.
Total	The total for the entire order minus the refunds. Both the extended price total and the charged amount total are displayed.

22.3.15 Order Management Finance Contact Fields

View this section if you want to know about the Order Management Finance tab.

On this tab, you can add, edit, or view the shipping information.

This field...	...Is Used as Follows
Shipping Name	The name of the addressee for shipping.
Address 1	The first address line.

This field...	...Is Used as Follows
Address 2	The second address line.
City	The city of the addressee.
State/Province	The state or province of the addressee.
Country	The country of the addressee.
Postal Code	The postal code of the addressee.
Contact Name	The contact name of a recipient.
Telephone	Contact telephone of the recipient..
Contact Fax	The fax number of the recipient..
Contact Email Address	The email address of the recipient.

22.3.16 Order Management Financial Transactions Fields

View this section if you want to know about the Order Management Financial Transactions tab.

You can view financial transaction information for an order from *Commerce* > *Order Management* > *Financial Transactions*. You can view the transaction type, item/material, order information, total price, account codes, whether the order has been approved and posting status. Under the Account Codes column, you can view account code, cost center, and profit center details of a financial transaction. This information can aid you when troubleshooting customer issues or performing financial investigations.

22.4 Vouchers Overview

Vouchers can be utilized for online items and classes with reserved seats.

Vouchers for Online Items

Creating Vouchers for Online Items

Vouchers are created for online items when a user with a *Shopping Account Type* of *External* uses the shopping cart to purchase a quantity of the online item. During the purchasing process, the user can check the *Add to Learning Plan* option to redeem one instance of the item for themselves and add it to their learning plan upon purchase. If the user has entered a quantity greater than 1, then the remaining number are reserved as vouchers. If *Add to Learning Plan* is left unchecked, all instances of the item are reserved as vouchers and are available to be

distributed to other learners. After completing the purchase, the voucher quantity and voucher number for the item are reflected in the user's *My Orders* > *Purchasing Options* dropdown.

Redeeming Vouchers for Online Items

Learners redeem vouchers for online items by entering the provided voucher number into the *Voucher Number* field when completing the item purchase. The system recognizes when unused vouchers are available for a specific item and automatically populates *Use Voucher Number* as a payment method option. Once the voucher is applied, the online item is assigned to the user's learning plan and can be started at any time. Once a voucher is redeemed, the number of available vouchers is updated in *Purchasing Options* for the user who purchased them.

> **Note**
>
> Users with a *Shopping Account Type* of *Internal* cannot purchase vouchers but can redeem vouchers created by *External* users. When an online item is available to an *Internal* user and the online item has unused vouchers, the *Use Voucher Number* payment method is displayed as an option at checkout. The *Use Voucher Number* option won't display for *Internal* users if the item requires approval.

Vouchers for Classes

Creating Vouchers for Classes

Vouchers are created for classes by administrators in *Learning Administration* > *Learning Activities* > *Classes* when reserving seats in a class and charging a price for the reservation. After reserving seats for a class, the voucher number is populated in the *Seat Reservations* tab for the class. Once a voucher is redeemed, the number of available vouchers can be reviewed by checking the number of *Reserved Seats Filled* against the total *Reserved Seats* available for the Seat Reservation.

Redeeming Vouchers for Classes

Administrators can reserve seats in a class for a user group or an organization, then those learners can redeem a voucher when registering for the class. Learners redeem vouchers for classes by entering the provided voucher number into the *Voucher Number* field when reserving a seat for the class. The system recognizes when reserved seats are available for a specific class and automatically populates *Use Voucher Number* as a payment method option. Once the voucher is applied, the user's seat in the class is reserved.

Related Information

Shopping Account Types for Learning-Only Users
Seat Reservations Fields [page 427]

22.5 Unused Vouchers

View this section if you want to know about unused vouchers.

The Unused Voucher wizard (*Finance* > *Unused Vouchers*) displays the unused vouchers of a shopping cart.

This field...	...Is Used as Follows
Item ID	A unique ID for the selected item.
Voucher Number	A system-generated unique ID for each purchase in the system. A voucher can include multiple units of the entry purchased.
Usages	Displays the number of times the vouchers for the selected entry has been used. It's displayed in the format **number used** of **total number** of items purchased.

22.6 SAP SuccessFactors Learning Coupons

SAP SuccessFactors Learning coupons provide discounts for users on the cost of training.

Coupons offer incentives in companies and organizations that track training costs through commerce. For example, you can create coupons for new items as a way to market and increase participation in a course.

22.6.1 Adding Learning Coupons

Add Learning coupons to give external learners discounts on the purchase price of a course.

Prerequisites

Coupons work in **external** learners' shopping carts, so you must enable their shopping carts and it must be of type **external**. You typically enable external shopping accounts when you first implement learning sites, but you can check shopping carts by opening external users and looking at *Finance*. Be sure that *Enable Shopping Account* is selected and *External* is selected in *Shopping Account Type*.

Coupons are part of a discounting process, which includes the automatic process *Coupon Expiration Notification* and display settings for coupons (in *System Administration* > *Application Administration* > *User Settings*). You typically set up this system as part of implementing Commerce, but if you haven't yet configured it, please do so before you add coupons.

Procedure

1. Go to Learning Administration, and then go to *Finance* > *Coupons*.
2. Click *Add New*.
3. Add coupon *Domain* to set which administrator roles can work on the coupon, set it to *Active* so that it can be used after you assign it to courses, and set *Owner Email* to a contact person who knows about the coupon.
4. Add a coupon name, code, and description to help learners understand the coupon.

Choice	Description
Coupon Code	You can only edit the value in the *Coupon Code* box as you're adding a new coupon record. The coupon code serves as the unique ID for the coupon record. To redeem a coupon in the user interface, users must provide the value from the *Coupon Code* box. Therefore, we recommend that you expose this value to users by including it in the *Coupon Name* or *Description* boxes. For example, you could include something like the following in one of these boxes: To redeem this coupon, enter coupon code COUP-123.
Coupon Name	Because the content of this box appears in the user interface and in reports, we recommend that you use the box to summarize the purpose of the record. To fully explain the purpose, you can use the *Description* box. To redeem a coupon in the user interface, users must provide the value from the *Coupon Code* box. Therefore, we recommend that you expose this value to users by including it in the *Coupon Name* or *Description* boxes. For example, you could include something like the following in one of these boxes: "To redeem this coupon, enter coupon code COUP-123."
Description	Because the content of this box appears in the user interface and in reports, we recommend that you enter a description that helps users identify the record or its purpose. To redeem a coupon in the user interface, users must provide the value from the *Coupon Code* box. Therefore, we recommend that you expose this value to users by including it in the *Coupon Name* or *Description* boxes. For example, you could include something like the following in one of these boxes: "To redeem this coupon, enter coupon code COUP-123."

5. In *Coupon Type*, decide how you want to calculate the discount.
   - Most customers select *Percentage* so that Learning calculates the discount based on the learners' currency preferences and the price of the course instead of administrators maintaining the discount lists. For example, you can offer a 25% discount. A 100 U.S. Dollar course is discounted 25 Dollars and that same course in Euros, assuming that the course were 120 Euros, is discounted 30 Euros. If you apply the 25% coupon to a second course, one priced at 200 Dollars, the coupon discounts the course by 50 dollars, and so on. You don't need to track that information.
   - If your business process requires it, you can select *Specified Amount* and track the discount in direct currency. If you choose to track the discount directly, you must use *Coupon Values* to set the amount of the discount per course and per currency and you must maintain the amounts relative to changes in course prices.
6. In *Coupon Value*, type the value of the coupon as either a percentage or a direct amount (depending on how you set *Coupon Type*).
7. Set limits on the coupon's usage.

Choice	Description
Valid From **and** *Valid To*	Set a date range for the coupon. For example, if the first quarter is typically a slow time for your organization and you want to offer a coupon to encourage external users to purchase training, you can set the coupon to be valid from the first day of the quarter and expire (valid to) the last day of the quarter. You can leave *Valid From* empty to make the coupon effective immediately. You should, however, provide a value for *Valid To* so that the coupon has an expiration date. If you don't type a value in *Valid From*, the coupon can be used indefinitely.
Max Uses	If you want to limit the total number of times a coupon can be applied (regardless of the user), then you can type that value in the *Max Uses* box. If you provide no value in the *Max Uses* box, then there's no limit on the maximum number of times that the coupon can be applied. However, if you also provide a value for the *Per User Limit* box, then the system allows a user to apply the coupon if 1) the value of the *Max Uses* box hasn't been reached and 2) the value of the *Per User Limit* box for that user hasn't been reached.
Per User Limit	If you include a value in the *Per User Limit* box, then that value is the maximum number of times **any one user** can use that coupon in the user interface. If you provide no value in the *Per User Limit* box, then there's no limit on the maximum number of times **any one user** can apply the coupon. However, the system doesn't allow a user to apply a coupon if the value in the *Max Uses* box has already been reached.

Next Steps

Assign the coupon with one or more courses in the *Items* area of the coupons.

If you selected *Specified Amount* in *Coupon Type*, write out the values of the coupon in *Coupon Values*.

Make coupons available to groups of users by creating an assignment profile that assigns coupons to them. Go to *Users* > *Assignment Profiles*.

22.6.2 Changing Coupon Display Settings

Change coupon display settings to control how external users see coupons in libraries.

Context

To redeem or apply the coupon, learners must hover the mouse on *Available* or *Expiring* symbols in the coupons area and take note of or write down the **coupon code**. You can decide how you want the coupons area to behave.

Procedure

1. Go to Learning Administration, and then go to *System Admin* > *Application Admin* > *User Settings*.
2. Find *Coupon Display Settings*.
3. Select how you want the coupon display area to work.
   - Most customers can select *Show Coupon Area Never* because most customers do **not** use coupons.
   - Select *Show Coupon Area Always* if you use coupons and you want the coupon area of the library to appear to learners even if there are no coupons for the course.
   - Select *Show Coupon Area Only when User has Active Coupons* if you use coupons and you want the coupon area to appear to learners when they have active coupons but not appear when they don't.
4. Click *Apply Changes*.

22.6.3 Checking Coupon Usage

Check the usage of coupons to see the popularity of the coupon or to see how near the coupon is to its usage limits.

Context

You can limit a coupons' usage when you create it. You can, for example, set a maximum amount of users who can apply the coupon. You can look at the coupon usage to see if its usage is nearing its limit.

Procedure

1. Go to Learning Administration, and then go to *Finance* > *Coupons*.
2. Find and open the coupon you want to investigate.
3. In *Coupon Details*, look at the coupon usage information.

Usage Information	Description
Remaining Redemptions	The remaining number of times that users can redeem the coupon.
Unique Items	The total number of unique items that users have applied the coupon to.
Unique Users	The number of times a unique user redeemed the coupon.
Redemptions	The total number of times that all users have redeemed the coupon.

22.6.4 Applying Coupons to Courses

Apply coupons to courses when you want external learners to use the coupon for a discount on the course.

Procedure

1. Go to Learning Administration, and then go to *Finance* > *Coupons*.
2. Find and open the coupon you want to edit.
3. Go to *Items*.
4. Click + *(Add Items)* so that learners can apply the coupon to the course.

22.6.5 Checking the Assignment Profiles that Assign a Coupon

If you want to know the assignment profiles that assign a coupon to users, you can open the coupon and check its assignment profiles.

Context

Often, you want to know which assignment profiles are automatically making assignments of coupons so that you can troubleshoot how coupons are being assigned. In this case, you know the coupon, but you don't know which assignment profiles assign that coupon to users. You can start with the coupon and work back to its assignment profiles.

> **Note**
>
> You can add the coupon to an assignment profile from within the coupon, but we recommend that you add it in the assignment profile. By going to the assignment profile, you can check the rules, preview the users, and use the other tools that help you make accurate assignment choices.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Finance* > *Coupons*.
2. Find and open the coupon you want to investigate.
3. Click *Assignment Profiles* to see the list of assignment profiles that assign the coupon.
4. Click any assignment profile to open the assignment profile.

22.6.6 Assigning SAP SuccessFactors Learning Coupons to Users

Assign coupons to users to give users discounts for training orders in SAP SuccessFactors Learning.

Context

If you are using SAP SuccessFactors Learning to track learning costs, you can give users coupons for their training. For example, if you want an organization to gain XML skills, you can give the organization a coupon to attend courses about XML.

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

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Manage User Learning* > *Assignment Profiles*.
2. Click *Add New* to create a new assignment profile.
3. In the new assignment profile, go to *Rules* to define the rules of the assignment profile.

   The rules create a pool of users by user attribute. All users in the pool get the same coupons.
4. Go to *Coupons*.
5. Click + *(Add Coupon)* to add the coupons to the user pool.
6. From the *Actions* menu, select *Execute Changes* and then *Update Users and Assignments* for the assignment profile.

22.6.7 Coupon Details Fields

View this section if you want to know about Coupon Details fields.

A system administrator can choose which controls to display and the order in which they display by modifying the entity configuration; therefore, we list each control that you might be able to access in alphabetical order.

This Field...	...Is Used as Follows
Active	When you make an entity inactive, the system doesn't include that entity in any searches or reports by default; however, some searches and reports allow you to override the default so that you can include inactive entities. You might make an entity inactive (rather than delete it) if you no longer want to use it but keep it for a historical record. Because you can't restore a deleted entity, we recommend that you delete an entity only when you make a mistake in some way (for example, if the entity ID is simply incorrect).
Coupon Code	You can only edit the value in the *Coupon Code* box as you're adding a new coupon entity. The coupon code serves as the unique ID for the coupon entity. To redeem a coupon in the user interface, users must provide the value from the *Coupon Code* box. Therefore, we recommend that you expose this value to users by including it in the *Coupon Name* or *Description* boxes. For example, you could include something like the following in one of these boxes: "To redeem this coupon, enter coupon code COUP-123."
Coupon Name	Because the content of this box appears in the user interface and in reports, we recommend that you use the box to summarize the purpose of the entity. To fully explain the purpose, you can use the *Description* box. To redeem a coupon in the user interface, users must provide the value from the *Coupon Code* box. Therefore, we recommend that you expose this value to users by including it in the *Coupon Name* or *Description* boxes. For example, you could include something like the following in one of these boxes: "To redeem this coupon, enter coupon code COUP-123."
Coupon Type	If you select *Specified Amount* from the *Coupon Type* list, then you can use the *Coupon Values tab* to identify the value of the coupon in multiple currencies. If you select *Percentage* from the *Coupon Type* list, then you don't need to use the *Coupon Values* tab: in this case, the system provides a percentage discount regardless of the item's currency. **Note** After you create a coupon, you can change the coupon type from *Specified Amount* to *Percentage*, and vice versa. However, when you do so, you must also modify the value in the *Percentage* box (type a value when switching to *Percentage* and clearing the value when switching to *Specified Amount*). If you switch from *Percentage* to *Specified Amount*, then you must add at least one currency to the *Coupon Values* tab.

This Field...	...Is Used as Follows
Coupon Value	As you add a new entity, the choice that you make for the *Coupon Type* list determines how you manage the value (specified amount or percent) of the coupon. • *Specified Amount* from the *Coupon Type* list, the system allows you to enter a value into the *Coupon Value* box that for the global default currency. After you add the coupon entity, you can configure and manage all of the (specific amount) discounts on the *Coupon Values tab*, where you can identify the value of a coupon in any one of the currencies that you've created. • *Percentage* from the *Coupon Type* list, the system allows you to enter a percentage value into the *Coupon Value* box. After you add the coupon entity, you can manage the percentage off that the coupon is worth by using the *Percentage* box (*Finance* > *Coupons* > *Summary tab*).
Description	Because the content of this box appears in the user interface and in reports, we recommend that you enter a description that helps users identify the entity or its purpose. To redeem a coupon in the user interface, users must provide the value from the *Coupon Code* box. Therefore, we recommend that you expose this value to users by including it in the *Coupon Name* or *Description* boxes. For example, you could include something like the following in one of these boxes: "To redeem this coupon, enter coupon code COUP-123."
Max Uses	If you want to limit the total number of times a coupon can be applied (regardless of the user), then you can type that value in the *Max Uses* box. If you provide no value in the *Max Uses* box, then there's no limit on the maximum number of times that the coupon can be applied. However, if you also provide a value for the *Per User Limit* box, then the system allows a user to apply the coupon if 1) the value of the *Max Uses* box hasn't been reached and 2) the value of the *Per User Limit* box for that user hasn't been reached.
Owner Email	We recommend that you record the e-mail address of the person who maintains or owns the entity so that other administrators have a contact if they need to use or modify the entity.
Per User Limit	If you include a value in the *Per User Limit* box, then that value is the maximum number of times **any one user** can use that coupon in the user interface. If you provide no value in the *Per User Limit* box, then there's no limit on the maximum number of times **any one user** can apply the coupon. However, the system doesn't allow a user to apply a coupon if the value in the *Max Uses* box has already been reached.

This Field...	...Is Used as Follows
Percentage	If you select *Percentage* from the *Coupon Type* list, then you can specify the percentage off value that the coupon is worth in the *Percentage* box.
Remaining Uses	This is a read-only value that displays the remaining number of times that users can redeem the coupon.
Security Domain	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permission restrictions of the role ID that is associated with the administrator. For more information about how you can configure access to entities, see Security.
Unique Items	This is a read-only value that displays the total number of unique items that users have applied the coupon to.
Unique Users	This is a read-only value that displays the number of times a unique user redeemed the coupon.
Uses	This is a read-only value that displays the total number of times that all users have redeemed the coupon.
Valid From	If you provide a date in the *Valid From* box, then users can't redeem the coupon until on or after that date. If you leave the *Valid From* box empty, then users can redeem the coupon immediately.
Valid To	If you provide a date in the *Valid To* box, then users can't redeem the coupon after that date has passed. If you leave the *Valid To* box empty, then users can redeem the coupon.

22.7 Free-of-Charge Subscriptions

View this section if you want to know about free-of-charge subscriptions in Finance.

Free-of-charge subscriptions allow administrators to identify libraries and organizations who are granted free access to those libraries. Library permissions are still managed by the assignment profile, but the free-of-charge subscription overrides all pricing within the library. This free access can be granted for a limited time by applying an expiration date. The free-of-charge subscription supports renewals by allowing an administrator to renew based on a set period.

22.8 SAP SuccessFactors Learning Purchase Orders

SAP SuccessFactors Learning purchase orders are local to the SAP SuccessFactors Learning Management System (LMS).

In SAP SuccessFactors Learning, purchase orders allocate money for training. Users or organizations can use purchase orders to pay for training. You can see purchase order by going to SAP SuccessFactors Learning Administration and then going to *Finance* > *Prepaid Accounts*.

22.8.1 Adding a Prepaid Account

View this section if you want to know about adding a prepaid account.

Context

Navigate *Commerce* > *Prepaid Account* > *Add New* > *Add New Prepaid Account*.

Procedure

1. Enter a Prepaid Account ID number in the *Prepaid Account ID* field.
2. Enter a name for the prepaid account in the *Title* field.
3. Enter the security domain name or select from a list of security domain names. Use the magnifying glass icon for the prepaid account in the *Security Domain* field.
4. Check the *Active* checkbox to ensure that your prepaid account is enabled for editing and searches.
5. Enter a prepaid account balance in the *Balance* field.
6. Enter an activation date (or select the calendar icon to select a date) for the date the prepaid account was created in the *Activation Date* field.
7. Set your Low Balance Warning Threshold amount (currency) in the *Low Balance Warning Threshold* field.
8. Enter a description of the prepaid account in the *Description* field. For example, you want to note what courses have been purchased.
9. Add emails to the *Warning Email Recipients* field to receive a prepaid account balance notification.
10. Enter relevant information for your prepaid account in the *Notes* field.

22.8.2 Copying a Prepaid Account

View this section if you want to know how to copy a prepaid account.

Context

Navigate to *Commerce* > *Prepaid Account* > *Actions* > *Copy* > *Copy Prepaid Account*.

Procedure

1. Enter a new Prepaid Account ID number in the *Prepaid Account* field.
2. Check the *Copy User Data* checkbox to include user data.
3. Check the *Copy Organization Data* checkbox to include organization data.
4. Click the *Reset* button to clear the *Prepaid Account ID* field, the *Copy User Data* checkbox, and the *Copy Organization Data* checkbox if you need to start over.
5. Click *Copy* when finished.

22.8.3 Deleting a SAP SuccessFactors Learning Prepaid Account

Delete a SAP SuccessFactors Learning prepaid account when you want to remove it completely from the Learning Management System (LMS).

Context

As an alternative to deleting a prepaid account, consider making it inactive. When you inactivate a prepaid account, you keep its data in place, but remove it from active use.

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.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Commerce* > *Prepaid Account*.
2. Find and open the prepaid account that you want to delete.
3. In *Actions*, click *Delete*.

22.8.4 Giving Organizations Access to a SAP SuccessFactors Learning Prepaid Account

Give organizations access to a SAP SuccessFactors Learning prepaid account to allow organizations to use the allocated money to purchase training in SAP SuccessFactors Learning.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Commerce* > *Prepaid Account*.
2. Find and open the prepaid account that you want to associate with organizations.
3. In *Organizations*, click *Add*.
4. Find the organizations that you want to associate to this prepaid account and add them.

22.8.5 Giving Users Access to a SAP SuccessFactors Learning Prepaid Account

Give users access to a SAP SuccessFactors Learning prepaid account to allow users to use the allocated money to purchase training in SAP SuccessFactors Learning.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Commerce* > *Prepaid Account*.
2. Find and open the prepaid account that you want to associate with users.
3. In *Users*, click *Add*.
4. Find the users that you want to associate to this prepaid account and add them.

22.9 Library Price Change

View this section if you want to change the price of an item or class.

To change the price of an item and/or class in the library, including pending and submitted items, go to the *Learning Activities* > *Items* or *Learning Activities* > *Classes* and then go to *Libraries*.

22.9.1 Library Price Change Fields

View this section if you want to know about Library Price Change fields.

This field...	...Is Used as Follows
Default	Select one row as the default price and currency for the item in this library.
Currency	All available currencies display.
Price	Enter the price you wish to use for the item in this library.
Add	Select the checkbox to indicate this is a new price to be added for the item in this library.

22.10 Master Inventory Price Change

View this section if you want to know about the *Master Inventory Price Change* wizard.

The Master Inventory (*Finance* > *Master Inventory*) stores all the items and classes in your system. Catalogs are populated from the master inventory. The *Master Inventory Price Change* wizard changes the price of an item or scheduled offering in the Master Inventory. You can also choose to have the price change propagated to related catalogs.

22.10.1 Master Inventory Price Change Fields

View this section if you want to know about Master Inventory Price Change fields.

This field...	...Is Used as Follows
New Price	The price to replace the old price that is being changed.

This field...	...Is Used as Follows
Apply Price Change to Catalog	This check box, when selected, allows you to select from catalog that is affected by the price change.
Item	This information includes the Type, ID, and Revision Date and Time of the item/material. It also gives the ID, Date, and Time of schedules of the corresponding item.
Price	The current price of the item.

22.11 Learning Metadata that Finance Uses

During initial deployment, you set enumerated lists for how your organization wants to manage its Learning commercial operations. These settings apply to Learning only.

Many organizations don't use commerce: they don't charge for their training or they track the expenses separately. For those organizations, the references in *References* > *Finance* are irrelevant. If your organization doesn't use commerce, your organization has probably disabled the pricing features so that users don't see prices in their catalogs.

For example, if your **learning** organization operates in multiple currencies in the **Learning Management System (LMS)**, then you can add those currencies in as commerce references.

> → Tip
>
> Commerce references are typically configured along with *FINANCIAL* system configuration. For example, if both `showPricingInternalUsers` and `showPricingExternalUsers` are set to `false` then it's unlikely that your organization uses commerce features.

Adding Learning Withdraw (Cancellation) Policies [page 831]
: Add Learning cancellation policies to define how Learning should refund or reconcile accounts when a user withdraws from a course.

Adding Learning Cost Names [page 832]
: Add cost names to Learning to categorize costs for training delivery.

Activating Learning Currencies [page 834]
: Activate currencies in Learning to enable them for Learning Commerce.

Setting the Default Global Currency [page 838]
: Set the default global currency your main currency for your SAP SuccessFactors Learning installation so that the system defaults to your common currency.

Adding Learning Account Code Types [page 839]
: Add account code types in Learning to categorize account codes in Finance.

Adding Learning Discount Rates [page 840]
: Add Learning discount rates to define how learners can purchase courses at a discount.

Adding Allocation Types [page 841]

Add allocation types if you post costs from SAP SuccessFactors Learning to SAP Financial Software and if you have a special case that can't use the standard allocation types of activity and cost posting.

Adding Allocation Codes [page 842]

Add allocation codes if you post costs to take trainings from SAP SuccessFactors Learning to SAP Financials.

Setting Default Allocation Type and Code [page 843]

Set default allocation type and code defaults if you are integrating with SAP financial systems because together, they describe how learning items and classes are reconciled in the financial system.

22.11.1 Adding Learning Withdraw (Cancellation) Policies

Add Learning cancellation policies to define how Learning should refund or reconcile accounts when a user withdraws from a course.

Context

Cancellation policies apply to you if you are using the commerce features of SAP SuccessFactors Learning. You use cancellation policies to create rules that Learning uses when users withdraw from a course. The policy determines how refunds are applied and costs are reconciled.

> ⓘ Note
>
> Although it is confusing, a cancellation policy applies to when users withdraw from a course.

Procedure

1. Go to Learning Administration, and then go to *References* > *Finance* > *Cancellation Policies*.
2. Add an ID and a *Description* that describes the policy, and then click *Add*.

   After you add the cancellation policy, you can define its rules in the *Rules* tab.
3. In *Delivery Offset*, set the number of days before or after the class start date when this rule should apply.

   > → Tip
   >
   > If you want to enforce a rule that occurs before the start date, type a negative number. If you want to enforce a rule that occurs after the start date, type a positive number.

   For example, if you want to apply no charge for withdrawing if the learner withdraws a week before the start of the class, type **-7**. If you want to apply the full charge if someone withdraws the day after the class starts, type **1**.
4. In *Cancellation Charge*, type the amount that the learner forfeits if they withdraw in the delivery offset period.

- If you want to refund the entire amount, select *No Charge*.
- If you want to charge the entire amount, select *Charge Full Price*.
- If you want to charge a percentage of the entire amount, select *Charge Percentage (percent)*, and then type the percentage that Learning should charge them.
- If you want to charge a fixed amount, select *Charge Fixed Amount*, type the amount you want to charge, and select your preferred currency.

> **Note**
>
> Fixed amounts can be difficult to manage, especially when you work in multiple currencies.

5. Click *Add*.
6. In *Grace Period*, type a number of days after they enroll that learners can withdraw without penalty.

   For example, if users register for the course and immediately realize that they registered for the wrong time, you might want to allow them to withdraw without penalty. If you set a grace period of 1 day, then those users would have one day to realize their mistake and withdraw without charge and without being held to the rules.
7. Click *Apply Changes*.

Task overview: Learning Metadata that Finance Uses [page 830]

Related Information

Adding Learning Cost Names [page 832]
Activating Learning Currencies [page 834]
Setting the Default Global Currency [page 838]
Adding Learning Account Code Types [page 839]
Adding Learning Discount Rates [page 840]
Adding Allocation Types [page 841]
Adding Allocation Codes [page 842]
Setting Default Allocation Type and Code [page 843]

22.11.2 Adding Learning Cost Names

Add cost names to Learning to categorize costs for training delivery.

Context

> **Note**
>
> Only the *Item* and *Class* applications can have a cost formula at the cost name level.

Procedure

1. Go to Learning Administration, and then go to *References* > *Fianace* > *Cost Names* .
2. Click *Add New*.
3. Type a *Cost Name* and *Description* to help others understand the cost that you are adding.

   Name the costs for categories that make sense for your reporting. For example, if you want to report on travel costs of training, type **`Travel`** in *Cost Name* and define what you mean by Travel in *Description*.
4. In *Apply to the Following*, select which types of resources the cost applies to.

   For example, travel costs can apply to either users or instructors, but you typically see costs associated to instructors as a resource to training. Likewise, you can assign a cleaning cost to a facility or a planning cost to courses (learning items).

   When you select an object to apply the cost name to, the cost name is available the object. You can assign costs to the object in more than one place. For example, if you add travel to instructors, you can go to the cost tabs of the instructor and assign travel costs. If you defined travel costs as leaving the region, the instructor might cost something when he or she leaves the region. In the **class** (scheduled offering), however, you might also assign travel costs for that instructor for that class. For example, the cost of a neighboring region is likely less than the cost of traveling oversees to another region.
5. Click *Add*.

Task overview: Learning Metadata that Finance Uses [page 830]

Related Information

Adding Learning Withdraw (Cancellation) Policies [page 831]
Activating Learning Currencies [page 834]
Setting the Default Global Currency [page 838]
Adding Learning Account Code Types [page 839]
Adding Learning Discount Rates [page 840]
Adding Allocation Types [page 841]
Adding Allocation Codes [page 842]
Setting Default Allocation Type and Code [page 843]

22.11.3 Activating Learning Currencies

Activate currencies in Learning to enable them for Learning Commerce.

Context

Learning currencies allow you to charge for learning in the users' local currencies and to account for costs in multiple currencies. Add currencies for economies where you operate and where you need financial transactions. Financial transactions that rely on currencies include charge back adjustments, order management, master inventory, cancellation policies, and account codes.

> **Note**
>
> The currency names and alphabetical codes are based on ISO 4217. For a complete list of the currency names and code elements, go to the ISO official web site.

> **Note**
>
> Learning currency metadata values are used by Learning and not by any other SAP SuccessFactors modules.

Procedure

1. Go to Learning Administration, and then go to *References* > *Finanace* > *Currencies*.
2. Search and edit the currency that you want to add to Learning. When searching, set the **Active** criteria to **Not Active** or **Both** when trying to add a new currency.
3. Select *Active*
4. Click *Apply Changes*.

Task overview: Learning Metadata that Finance Uses [page 830]

Related Information

Adding Learning Withdraw (Cancellation) Policies [page 831]
Adding Learning Cost Names [page 832]
Setting the Default Global Currency [page 838]
Adding Learning Account Code Types [page 839]
Adding Learning Discount Rates [page 840]
Adding Allocation Types [page 841]
Adding Allocation Codes [page 842]
Setting Default Allocation Type and Code [page 843]

22.11.3.1 Currencies Fields

In SAP SuccessFactors Learning, you use these fields to define currencies that can be used for finance features like cost tracking or purchasing of courses.

This field...	...Is Used as Follows
Label ID	The label ID is what users see next to the currency when it's used as price. For example, to denote the US dollar, when you use the dollar sign '$', you need to use the Label ID "USD".
Active	This flag indicates if the corresponding currency is Active or Inactive. Inactive currencies can't be used to price items in the system. To use this currency to price or cost learning activities, you must set it to 'active'.
Currency ID	This ID is based on the ISO 4217 currency names and alphabetical code. For a complete list of the currency names and code elements, go to the ISO official web site.
Global Default Currency	This flag indicates if the corresponding currency is the system-wide default currency. The default global currency is set to USD (US dollars). Prices in the system are set to the default global currency.

22.11.3.2 Rules for Deactivating a SAP SuccessFactors Learning Currency after Implementation Time

If you have been using a currency in production and you want to remove it from circulation, be aware of the rules that apply when you deactivate it.

An active currency shows *Yes* in the *Active* column of the list of currencies. The list of currencies is available in *References* > *Finance* > *Currencies*. To deactivate a currency, clear its *Active* checkbox.

When you deactivate a currency after implementation time, chances are that you've associated the currency to some costs and some entities in the system. To remove the currency, you need to remove the associations. Some associations are enforced and some aren't. Enforced associations require you to go into each entity and remove any references to the currency. Unenforced associations are ignored by the system.

Currencies Associations that are Enforced

If you've associated the currency with any of the costs listed below, you're required to manually disassociate the currency for the costs before you deactivate the currency. Go into each entity and remove any references to the currency in their costs.

- item pricing
- class pricing
- item-library pricing
- materials pricing
- materials costs
- instructor costs
- facility costs
- master inventory records
- Item type costs
- item costs
- shopping cart records
- user records (preferences)
- locale records
- site records
- cost name records
- custom resources costs
- equipment costs
- location costs
- class costs
- Plan activity records (with plan status = "Draft", Inactive/Approved" or the latest version of the plan with the status "Active/Approved")

Currency Associations that are Ignored

However, you can deactivate a currency used in association with any of the following entities:

- history record entities
- refund entities
- cancellation policy entities
- order entities
- Training approval process entities
- Plan activity entities (with plan status = "Superceded", "Expired" or an earlier version of the plan with the status "Active/Approved")

22.11.3.3 Rules for Finding Prices for Multiple SAP SuccessFactors Learning Currencies

When users browse libraries that include multiple currencies, the rules apply to determine what price (amount and currency pair) to show users for the courses.

Users can be associated with one library or they can be associated with multiple libraries. For example, if a user can see courses from both the Human Resources (HR) library and the Information Technology (IT) library, then they see multiple libraries. Users typically don't know that they're associated with multiple libraries.

Single Library

If the price of the item in the library matches users' preferred currency, then the system shows the item priced in the users' preferred currencies. If SAP SuccessFactors Learning can't find the users' preferred currency, the item shows a message saying **Not available in your currency.**

Multiple Libraries

Each library can have a different price. For example, the price in the HR library can be lower than the price in the IT library. If more than one price exists in the libraries in the same currency for the item, then:

- SAP SuccessFactors Learning compares the available prices for the course and shows users the lowest price in the users' currency.
- If SAP SuccessFactors Learning can't find a price in users' preferred currency, the user sees the lowest default price.

For example, imagine a user's preferred currency is British Pound Sterling (£) and the user is a part of two libraries: Library A and Library B. The user finds a course that is listed in Library A for AUS 100.00, **British Pound Sterling (£) 150.00**, and USD 130.00 (default). In Library B, that same course is listed for is NZS 100.00 (default), and **British Pound Sterling (£) 130.00**. The user sees the price as British Pound Sterling (£) 130.00, which is the lowest cost in their preferred currency.

Now, imagine that the same scenario, but for a user whose default currency is the Euro. Because none of the prices are in the user's preferred currency, the user sees the lowest default price. The lowest default price considers currency conversion, so imagine that at the time the user was viewing the library, the NZS 100.00 price was the lowest at current conversion rates. The user sees the cost at NZS 100.00.

22.11.3.4 Learning Currency Conversion

Import currency conversion sets to control how the system converts prices for Learning courses.

Currency conversions are used in the training planner to convert training requests into a single currency for request totals. To use currency conversions with the training planner, you must associate the currency conversion set to a training request period (*References* > *Training Planner* > *Training Request Periods*.

To modify or add currency conversions, use the data import tool at *System Administration* > *System Management Tools* > *Import Data*.

22.11.4 Setting the Default Global Currency

Set the default global currency your main currency for your SAP SuccessFactors Learning installation so that the system defaults to your common currency.

Context

By default, the global currency of SAP SuccessFactors Learning is the US Dollar (USD). Any transaction or cost, therefore, defaults to US Dollars. If you want your transactions and costs to default to a different currency, we recommend that you change the currency during implementation, before you record costs or process transactions.

In general, you want to select the default currency that matches your largest user population in SAP SuccessFactors Learning, which is often your reporting currency, but not always. For example, if you are a European company, you might want to default to Euros. If you change it to Euros, then when administrators first create costs,, those costs will default to Euros.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *Global Application Settings*.
2. In *Currency*, select your default global currency.
3. Click *Apply Changes*.

Task overview: Learning Metadata that Finance Uses [page 830]

Related Information

Adding Learning Withdraw (Cancellation) Policies [page 831]
Adding Learning Cost Names [page 832]
Activating Learning Currencies [page 834]
Adding Learning Account Code Types [page 839]
Adding Learning Discount Rates [page 840]
Adding Allocation Types [page 841]
Adding Allocation Codes [page 842]
Setting Default Allocation Type and Code [page 843]

22.11.5 Adding Learning Account Code Types

Add account code types in Learning to categorize account codes in Finance.

Context

Account codes define how money flows during Learning chargebacks. Each account code is fully identified by the account code ID, the account code type, and the company code. You must have a fully identified account code to post chargebacks to SAP Financials because the fully qualified account code tells SAP Financials exactly how to move the money.

For example, the system can execute a chargeback against a Work Breakdown Structure (WBS) element so that the system can account for the chargeback against a phase, function, or object of a project. You can create multiple accounts each of the type WBS, for different phases of constructing a building: a WBS account for design planning, a WBS account for developing contract deliverables, a WBS account for site work, and so on.

Your account code types appear with your accounts throughout SAP SuccessFactors Learning Finance. For example, when you search for account codes, you can filter your search by account codes of type WBS.

Procedure

1. Go to Learning Administration and then go to *References* > *Finance* > *Account Code Types*.
2. Click *Add New*.
3. Add an ID and a *Description* to help others understand the account code type.
4. Click *Add*.

Task overview: Learning Metadata that Finance Uses [page 830]

Related Information

Adding Learning Withdraw (Cancellation) Policies [page 831]
Adding Learning Cost Names [page 832]
Activating Learning Currencies [page 834]
Setting the Default Global Currency [page 838]
Adding Learning Discount Rates [page 840]
Adding Allocation Types [page 841]
Adding Allocation Codes [page 842]
Setting Default Allocation Type and Code [page 843]

22.11.6 Adding Learning Discount Rates

Add Learning discount rates to define how learners can purchase courses at a discount.

Context

Create a discount rate that defines a percentage discount. You can include the rate with a library. Users who are assigned that library can purchase the items at the discount. For example, the full price of a course might be $100, but you might want users in the "Internal" library to purchase the course at 10% off the full price. You add a discount of 10% to make the price is $90 for users in the "Internal" library.

Procedure

1. Go to Learning Administration, and then go to *References* > *Finance* > *Discount Rates*.
2. Click *Add New*.
3. Add an ID and *Description* that helps others identify the discount rate.
4. In *Discount*, add the percentage discount that learners should receive if they use this discount rate.
5. Click *Add*.

Task overview: Learning Metadata that Finance Uses [page 830]

Related Information

Adding Learning Withdraw (Cancellation) Policies [page 831]
Adding Learning Cost Names [page 832]
Activating Learning Currencies [page 834]
Setting the Default Global Currency [page 838]
Adding Learning Account Code Types [page 839]
Adding Allocation Types [page 841]
Adding Allocation Codes [page 842]
Setting Default Allocation Type and Code [page 843]

22.11.7 Adding Allocation Types

Add allocation types if you post costs from SAP SuccessFactors Learning to SAP Financial Software and if you have a special case that can't use the standard allocation types of activity and cost posting.

Context

Together, allocation types and codes allow you to allocate the cost of training to a cost center that isn't the users' cost center. For example, is a consultant enrolls in course and you want to allocate the cost back to the customer. You can do it with allocation types and codes.

In most cases, you can use the supported allocation types of activity or cost posting. Those two types are already present in SAP SuccessFactors Learning. In rare cases, however, you might need to add special allocation types.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Finance* > *Allocation Types* .
2. Click *Add New*
3. Type the name of the allocation type in *Allocation Type*, a description in *Description*, and then click *Add*.

   Continue to add allocation types until you've added all specialized allocation types in your SAP FICO system. The values should match your values in SAP FICO.

Next Steps

After you add the specialized allocation types, you can add them to allocation codes. Allocation types are an attribute of allocation codes.

Task overview: Learning Metadata that Finance Uses [page 830]

Related Information

Adding Learning Withdraw (Cancellation) Policies [page 831]
Adding Learning Cost Names [page 832]
Activating Learning Currencies [page 834]
Setting the Default Global Currency [page 838]
Adding Learning Account Code Types [page 839]
Adding Learning Discount Rates [page 840]

Adding Allocation Codes [page 842]
Setting Default Allocation Type and Code [page 843]

22.11.7.1 Supported Allocation Types and Their Meanings

These default allocation types are supported for integration with SAP Finance.

Allocation Type	Meaning in SAP Finance
Activity	Maps to an activity allocation posting in SAP Finance
Cost Element	Maps to a cost transfer posting in SAP Finance.

22.11.8 Adding Allocation Codes

Add allocation codes if you post costs to take trainings from SAP SuccessFactors Learning to SAP Financials.

Context

Together, allocation types and codes allow you to allocate the cost of training to a cost center that isn't the user's cost center. For example, if a consultant enrolls in course and you want to allocate the cost back to the customer, you can do it with allocation types and codes.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Finance* > *Allocation Codes*.
2. Click *Add New*.
3. Type the name of the allocation code in *Allocation Code*. Type the description in *Description*. In *Allocation Type*, select one of the allocation types you added, and then click *Add*.

   Continue to add allocation codes until you've added all allocation codes in your SAP FICO system.

Next Steps

After you add allocation types and codes, go to *Learning Activities* > *Items* and *Learning Activities* > *Classes* and add the correct allocation codes in *Chargeback*.

Task overview: Learning Metadata that Finance Uses [page 830]

Related Information

Adding Learning Withdraw (Cancellation) Policies [page 831]
Adding Learning Cost Names [page 832]
Activating Learning Currencies [page 834]
Setting the Default Global Currency [page 838]
Adding Learning Account Code Types [page 839]
Adding Learning Discount Rates [page 840]
Adding Allocation Types [page 841]
Setting Default Allocation Type and Code [page 843]

22.11.9 Setting Default Allocation Type and Code

Set default allocation type and code defaults if you are integrating with SAP financial systems because together, they describe how learning items and classes are reconciled in the financial system.

Prerequisites

Create the allocation type and allocation code that you want to use as a default in *References* > *Finanace*. Make note of the IDs to put into the configuration file.

Context

You can set allocation types and codes in learning items or classes, but when you first create a learning item or scheduled offering, SAP SuccessFactors Learning populates it with a default value.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Open *FINANCIAL*.
3. Set `financialPostingAllocationType` to the default allocation type that you want for your transactions.

4. Set `financialPostingAllocationCode` to the default allocation code that you want for your transactions.

Task overview: Learning Metadata that Finance Uses [page 830]

Related Information

Adding Learning Withdraw (Cancellation) Policies [page 831]
Adding Learning Cost Names [page 832]
Activating Learning Currencies [page 834]
Setting the Default Global Currency [page 838]
Adding Learning Account Code Types [page 839]
Adding Learning Discount Rates [page 840]
Adding Allocation Types [page 841]
Adding Allocation Codes [page 842]

22.12 Learning Metadata that Training Planner Uses

Some Learning metadata is specific to Training Planner (government reporting of training expenditures).

Some customers use Training Planner. If you do, you use metadata to define categories for the reports you submit.

22.12.1 Adding Learning Employee Classifications

If you use Training Planner, you use employee class (classification) categorize the types of employees who receive training from you.

Context

Employee class is a categorization of users for Training Planner. Training Planner reports show you how different **classifications** of employees used the training budget.

The values in Learning Administration *References* should always match those in SAP SuccessFactors Platform because Platform is the system of record. User Connector - SF adds most references that matter to Learning assignments.

Procedure

1. Go to Learning Administration, and then go to *References* > *People Management* > *Employee Classes*.
2. Click *Add New*.
3. Add an ID and a description that matches your company policy.

22.12.2 Adding Learning Employee Statuses

Add Learning employee statuses so that you can use them in assignment profiles rules to pool learners and assign them courses, curricula, and so on.

Context

Use employee status with assignment profiles to automatically assign courses to users based on their employee status. It is a description, matched to your business, of the current relationship of the employee to the business. For example: full time, family leave, disability leave, and so on. You often want to assign courses by these categories.

> → Tip
>
> Some customers do not want to import employee status metadata to Learning because they want to compartmentalize information. Learning administrators don't need to know your employees' employment status and employee type can be a good substitute for employee status.

The values in Learning Administration *References* should always match those in SAP SuccessFactors Platform because Platform is the system of record. User Connector - SF adds most references that matter to Learning assignments.

Procedure

1. Go to Learning Administration, and then go to *References* > *People Management* > *Employee Statuses*.
2. Click *Add New*.
3. Add an ID and a description that fits the employee status types that you want to use in assignment profile rules.
4. Click *Add*.

22.12.3 Adding Learning Training Planner Reporting Legal Entity

Add a reporting entity for each group that should have its expenditures reported together in Training Planner.

Prerequisites

Legal entities often correspond to different countries, so you select a country when you create them. Add your countries in *References* > *Geography* > *Countries/Regions*.

Context

When you consider your legal entities, think about how you want to group training expenditures. In most cases, you can group by how you report your budget to an authority - either a legal authority or your own company's budget authority. To see your legal entities, go to SAP SuccessFactors Learning administration and then go to *References* > *Training Planner* > *Reporting Legal Entities*.

Procedure

1. Go to Learning Administration, and then go to *References* > *Training Planner* > *Reporting Legal Entities*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps administrators understand the reporting legal entity.
4. In *Country/Region*, select the country that the reporting entity belongs to.
5. Click *Add*.

Next Steps

After you create legal entities, associate them with courses and classes in *Government Reporting*. Learning can then make a connection between which learning items and which scheduled offerings belong to which reporting legal entity.

22.12.4 Adding Learning Training Planner Training Actions

Add training actions to categorize how training was delivered for companies using Training Planner.

Context

If you use Training Planner for government reporting, the training actions define reporting categories. Often, governing agencies want to know how training took place. For example, whether it took place during work hours.

Procedure

1. Go to Learning Administration, and then go to *References* > *Training Planner* > *Training Actions*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps administrators understand the training actions.
4. Select *Eligible For Outside Work Hours* if the action is eligible for reporting as outside work hours.
5. Click *Add*.

22.12.5 Adding Learning Training Funding

Add training funding to categorize the source of funds used to pay for training in Training Planner.

Context

If you're using the training planner, you set up training funding entities to represent the sources of funding for your training budget. In organizations that need to report to a government entity, training funding sources are among the data sets that you must report. If you aren't reporting to a government agency, training funding can still be useful for traceability.

By default, the system creates one training funding source: **company**. The company source represents funds that reach your budget from your company itself.

Procedure

1. Go to Learning Administration, and then go to *References* > *Training Planner* > *Training Funding*.
2. Click *Add New*.

3. Add an ID and then a *Description* that helps administrators understand the training actions.
4. Select *Company Funded* if the source of the training comes from your company.
5. Click *Add*.

22.12.6 Adding Learning Training Planner Programs

Add training planner program to categorize your expenses for reporting if you're using Training Planner.

Context

A training program is a way to categorize your courses for SAP SuccessFactors Learning Training Planner so you can use them when posting learning results by adding or editing learning history.

Procedure

1. Go to Learning Administration, and then go to *References* > *Training Planner* > *Training Program*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps administrators understand the Training Planner program.
4. Click *Add*.

22.12.7 Adding Learning Training Planner Request Periods

Add Training Planner request periods define a budget cycle in Training Planner.

Prerequisites

Add currencies that you need for Training Planner in *References* > *Finance* > *Currency Conversion*.

Context

Each training request period matches a budget cycle. For example, if your training budget cycle is annual, then you create one training request period for every year. If your training budget cycle is quarterly, then you create that you create a one training period for every quarter.

You create request periods in *References* > *Training Planner* > *Training Request Periods*. Your employees, including managers and training planners, manage the training request process once for each period that you create.

Procedure

1. Go to Learning Administration, and then go to *References* > *Training Planner* > *Training Request Periods*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps learners understand the designation type.
4. Select *Allow Planning* if you want users and managers to submit training requests for the request period.
5. In *Manager can Assign Training*, set how managers can assign training in a Training Planner environment.
    - If you select *Never*, managers can never assign training. Select *Never* if you rely on training planners to make all assignments.
    - If you select *Only after Budget Review*, managers can assign training only after the budget has been reviewed. Select *Only after Budget Review* if you want to keep more budgetary control with your organization but to allow managers to assign within the reviewed budget. When you select this option, training planners often fill seats for all requests to meet the budget. If there are additional seats left after budget review, the managers can fill the seats with their employees.
    - If you select *Before or after Budget Review*, managers can assign training at any time. Select *Before or after Budget Review* for the most flexibility for managers.
6. In *Budget Currency*, add the currency for the request period so that reports and organization owners view the requests in the currency.
7. If your training requests are submitted in multiple currencies, add *Currency Conversion Set* so that Learning can convert all currencies in a single currency when it calculates request totals.
8. In *Start Date* and *End Date* add the beginning and the end of the request period.

    > **Note**
    >
    > You can't change the start and end dates after requests have been submitted for the training request period.

9. Click *Add*.

22.13 FINANCIAL

The FINANCIAL system properties described here control parts of SAP SuccessFactors Learning finance.

Parts of the FINANCIAL file work together with BOOTSTRAP-PAYMENT-GATEWAY to configure the payment connector. The rest of the file sets up finance in the SAP SuccessFactors Learning product. We recommend that you review all your current settings when you make financial changes.

The FINANCIAL configuration file contains the PayPal Payflow Pro login settings and the settings to control the behavior of SAP SuccessFactors Learning when a user provides payment information. The file appears to all customers in *System Administration* > *Configuration* > *System Configuration* > *FINANCIAL*.

Name	Description	Default Value	Notes	Payflow Specific Setting?
autoOrderApproval	The autoOrderApproval property must be set to true.	true	The false setting isn't supported.	No
autoCreateMasterInventory	If autoCreateMasterInventory is set to true, then all materials, items, and classes created are automatically added to the source inventory.	true	We recommend setting to true because most organizations want their source inventory to include everything in inventory.	No
financialTxApprovalRequired	If financialTxApprovalRequired is set to true, the financial transactions have to be approved by an administrator before the transactions can be extracted.	true		No
skuPrefix	The alphanumeric characters in the skuPrefix property are added to the beginning of every SKU in finance.	SKU-		No
orderNoPrefix	The alphanumeric characters in the orderNoPrefix property are added to the beginning of every order number in finance.	ORDNO-		No
orderTicketNoPrefix	The alphanumeric characters in the orderTicketNoPrefix property are added to the beginning of every voucher number in finance.	V-		No
shoppingAccountPrefix	The alphanumeric characters in the shoppingAccountPrefix property are added to the beginning of every shopping account in finance.	SHPNGACCTID-		No

Name	Description	Default Value	Notes	Payflow Specific Setting?
shoppingAccountTypeStudent	The shoppingAccountTypeStudent property defines the default shopping account type for newly added users. The shopping account type can be INTERNAL or EXTERNAL.	INTERNAL		No
shoppingAccountTypeOrganization	The shoppingAccountTypeOrganization property defines the default shopping account type for newly added organizations. The shopping account type can be INTERNAL or EXTERNAL.	INTERNAL	The shopping account type matters because external users can be excluded from some transactions.	No
externalStudentPaymentMethodChargebackEnabled	When checking out at the shopping cart, can the external user use chargeback payment method?	true		No
externalStudentPaymentMethodCreditCardEnabled	When checking out at the shopping cart, the externalStudentPaymentMethodCreditCardEnabled controls whether an external user (or user in an external organization) can use a credit card as a payment method.	false		Yes
creditCardAuthorizationEnabled	Set creditCardAuthorizationEnabled to true to enable transactions through PayPal Payflow Pro.	false		Yes

Name	Description	Default Value	Notes	Payflow Specific Setting?
creditCardSecurityCodeRequired	Set creditCardSecurityCodeRequired to true to require users to enter their credit card security code (for example, the three digits on the back of a Visa card).	true	Check PayPal Payflow Pro documentation and your Payflow configuration before setting this property.	Yes
creditCardSecurityCodeMasked	Set creditCardSecurityCodeMasked to true to mask the users' security code number in text boxes so that another person, looking over the users' shoulders, couldn't see the number.	true		Yes
expYearOffset	The expYearOffset property defines the number of expiration years to show in the dropdown, starting with the current year.	10		Yes
validateCreditCardNumber	Set validateCreditCardNumber to true to do basic validation on the credit card number, such as: does the credit card number have the correct number of digits?	true		Yes
creditCardNumberMasked	Set creditCardNumberMasked to true to mask the users' credit card number in text boxes so that another person, looking over the users' shoulders, couldn't see the number.	true		Yes

Name	Description	Default Value	Notes	Payflow Specific Setting?
storeLast4Digits	Set storeLast4Digits to true to encrypt and store the last four digits of the credit card number for auditing purposes.	true		Yes
paymentGateway	Always set paymentGateway to "PayPal" for PayPal Payflow Pro transactions.	PayPal		Yes
paymentGatewayPartner	The paymentGatewayPartner property contains the ID provided to you by the authorized PayPal reseller who registered you for the Payflow SDK. It's limited to twelve alphanumeric, case-sensitive characters.	(null)	If you purchased your account directly from PayPal, use PayPal.	Yes
paymentGatewayVendor	The paymentGatewayVendor property contains merchant login ID that you created when you registered for the account. It's limited to sixty-four alphanumeric, case-sensitive characters.	(null)		Yes
paymentGatewayUser	The paymentGatewayUser property contains the ID provided to you by PayPal or the authorized PayPal Reseller who registered you for the Payflow SDK. If you purchased your account directly from PayPal, use PayPal. It's limited to sixty-four alphanumeric, case-sensitive characters.	(null)		Yes

Name	Description	Default Value	Notes	Payflow Specific Setting?
paymentGatewayPassword	The paymentGatewayPassword contains the password to the Payflow Pro account.	(null)	The password is encrypted when you save the file.	Yes
paymentGatewayCurrencies[USD]	The paymentGatewayCurrencies sets the currencies accepted by Payflow Pro. By default, we set up US Dollars (USD).	true	For each currency you want to add, copy paymentGatewayCurrencies[USD] and change "USD" to your three letter currency code, then set the property to true. To disable the currency while leaving its entry in the file, set it to false.	Yes
paymentGatewayProxyAddress	Check with your network administrator or SAP SuccessFactors representative for the correct value.	(null)		Yes
paymentGatewayProxyPort	Check with your network administrator or SAP SuccessFactors representative for the correct value.	(null)		Yes
paymentGatewayProxyLogon	Check with your network administrator or SAP SuccessFactors representative for the correct value.	(null)		Yes
paymentGatewayProxyPassword	Check with your network administrator or SAP SuccessFactors representative for the correct value.	(null)		Yes
userPurchaseOrderBalanceDisplay	When userPurchaseOrderBalanceDisplay is set to true, users can see their prepaid account balance in *My Orders*.	true		No

Name	Description	Default Value	Notes	Payflow Specific Setting?
displayPurchaseOrdersToUsers	When displayPurchaseOrdersToUsers is set to true, users can see their prepaid account in *My Orders* and the shopping cart checkout page.	true		No
showPricingInternalUsers	If set to true, internal users see currency filters, and pricing in their library. If set to false, internal users don't see currency and pricing in their libraries. Set to false if you don't use the finance module and you want to hide price so that users aren't confused by it.	true	This setting affects only the display of finance to internal users. It **doesn't** turn off finance. If you have finance set up for internal users, we recommend you set this to true. This setting applies to both legacy search and enhanced search.	No
showPricingExternalUsers	If set to true, external users see currency filters, and pricing in their library. If set to false, external users don't see currency and pricing in their libraries. Set to false if you don't use the finance module and you want to hide price so that users aren't confused by it.	false	This setting affects only the display of finance to external users. It **doesn't** turn off finance. If you have finance set up for external users, we recommend you set this to true. This setting applies to legacy search only.	No
fullRefundWhenReenroll	If set to true: when users enroll in a class, then cancel and get a partial refund, if they re-enroll in the same class, the initial order is updated with a full refund. A second order is created for the re-enrollment.	false	The refund **isn't** applied automatically if the purchase was made through a credit card and the payflow system was down at the time of the automatic refund. The refund is also not applied if the re-enrollment occurs through a connector.	No

Name	Description	Default Value	Notes	Payflow Specific Setting?
financialTransactionAPICutOffDate	Set this to the earliest date that you want to start posting transactions to an external financial system. For example, if you decide to post transactions to an external financial system but only want to post transactions that took place on or after January 1, 2015, set to 01/01/2015. Individual calls to get transactions can override this value, so this value doesn't prevent you from looking past the date. It does, however, provide back stop if the GET call doesn't provide a value.	(null)		No
requireOrderTicketWhenSlotAvailable	When set to false, users can register for a class without entering a voucher ID if there is reserved seat available for them. By default, a voucher ID is required	true		No
financialPostingAllocationType	This is the allocation type for the default financial posting type to post a transaction to a configured financial system.	(null)	When the *Financial Posting Type* isn't specified for an Item or Class, then this default value is applied.	No
financialPostingAllocationCode	This is the allocation code for the default financial posting type to post a transaction to a configured financial system.	(null)	When the *Financial Posting Type* isn't specified for an Item or Class, then this default value is applied.	No

Name	Description	Default Value	Notes	Payflow Specific Setting?
enableRecordCompletionInInstructorViewWithFinance	If set to true, the *Record Completion* button is active in the Instructor View when a class's purchasing options are something other than No Charge. This includes purchasing options: Distribute Charges to Specified Account Code, Charge to Buyer's Authorized Account Code, or Charge to Buyer's Specified Account Code. By default configuration is false so that only classes with a purchasing option of No Charge will support record completion.	false		

22.13.1 Refund on Re-Enroll into the Same Course

If you use commerce functionality in SAP SuccessFactors Learning and if you set `fullRefundWhenReenroll` to **`true`**, then this example applies to you. It shows how the system behaves when users drop out of a class and then re-enroll.

Some customers' financial policy states that any cancellation fee is waived if the user re-enrolls for the same class (the same course given at the same time). If that is your policy, you can configure SAP SuccessFactors Learning to automatically issue a full refund to support your re-enrollment policy. To configure your system for the Refund on Re-Enroll policy, go to *System Administration* > *Configuration* > *System Configuration* > *FINANCIAL* and set `fullRefundWhenReenroll` to **`true`**.

When you set `fullRefundWhenReenroll` to **`true`**, the system behaves as follows.

User is Enrolled in Class, it has a Price, and a Cancellation Policy is in Effect

The process begins when a user is enrolled in a class. The system creates an order for the user. For example, ORDERNO-100.

The class must have a price and must have a cancellation policy. In most cases, the cancellation policy refunds some percentage of the price. For the purposes of this example, assume that the refund is 25% of the price. That means that if the price was $1000, a user who withdraws from the class receives $250 dollars in refund.

The enrollment and cancellation policy is standard commerce behavior.

User Withdraws or is Withdrawn from the Class

When users withdraw from the class, they trigger the cancellation policy and refund on the original order (ORDERNO-100). After any withdraw approval process, the order number is updated with the refund. For example, ORDERNO-100 receives a refund of 25%.

Withdraw and refund is standard commerce behavior.

User Re-Enrolls in the Same Class

Refund on Re-Enroll works only when users re-enroll into the same class. For example, if you offer "Business Writing" classes every month, and if they withdrew from the January offering of "Business Writing" they must re-enroll into the January offering of "Business Writing" as opposed to "Business Writing" offered in February. It must be the exact same class.

If `fullRefundWhenReenroll` is set to **`true`**, then when the user re-enrolls, the original order number receives a full refund and a new order number is created for the re-enrollment. In this example, ORDERNO-100 is refunded the remaining 75% of the price and a new order number (ORDERNO-102) is created for $1000. Whoever is re-enrolling the user sees messages that provide information about the refund so that he or she can make informed decisions.

After re-enrollment (and any approval processes), if you go to *Learning Activities* > *Classes* > *Registration* > *Advanced*, you see both order numbers associated with the user.

22.14 BOOTSTRAP-PAYMENT-GATEWAY

This topic describes the BOOTSTRAP-PAYMENT-GATEWAY system properties file. Its properties are only viewable to on-premise customers.

The BOOTSTRAP-PAYMENT-GATEWAY file contains the network and logging settings of the PayPal Payflow Pro connection. It appears only to on-premise customers in the *System Administration* > *Configuration* > *System Configuration* > *BOOTSTRAP-PAYMENT-GATEWAY*. If you're an on-demand customer of SAP SuccessFactors Learning, contact a SAP SuccessFactors representative for help.

Name	Description	Default Value	Notes
`hostAddress`	The `hostAddress` property contains the URL of the host for the PayPal site hosting your Payflow Pro account.	pilot-payflowpro.paypal.com	By default, SuccessFactors Learning goes to the test, or "pilot" site. Read more about the pilot site and find your live transaction site in the PayPal Payflow Pro documentation.
`hostPort`	The `hostPort` property contains the port that SuccessFactors uses and that PayPal Payflow Pro requires.	443	The port is unlikely to change, but it can change. Check the PayPal Payflow Pro documentation.
`timeout`	This is the timeout for a payment request. If a request is not complete by the timeout, SuccessFactors Learning disconnects.	60	The unit is seconds.
`logFilename`	The `logFilename` property contains the name of the Payflow Pro log.	payflowpro.log	SuccessFactors Learning stores it in the temp directory as defined by the Java Virtual Machine (JVM).
`logSeverity`	The `logSeverity` property contains a one-digit code to define the sensitivity of the log.	1	You can set the log sensitivity to one of six levels, which includes OFF.
`maxLogFileSize`	The `maxLogFileSize` property contains the size that the log file will be allowed to grow to before it is truncated	1000000	The unit is bytes.

22.15 Training Planner Automatic Assignment Properties

System administrators can set automatic assignment of training requests from the training planner in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*.

Property	Description
`autoAssignReviewedTrainingRequests`	When set to **`true`**, this configuration enables automatic assignment of training requests if the organization has been reviewed and either the seats requested equals seats granted or the preselected user count is equal or less than the seats granted.

Property	Description
`defaultAssignmentTypeForAutoAssignTrainingRequests`	When `autoAssignReviewedTrainingRequests` is set to **`true`** and when the learning item doesn't have a default assignment type, the system uses this assignment type when assigning users.

23 Learning System Administration

Learning system administration involves implementing Learning according to your company's needs and keeping the implementation current as those needs change.

Learning system administration is different from other work you do in Learning because it happens less frequently. You do most of the system administration work when you first implement Learning and then return to system administration when your organization policies change or you need to implement or adopt a new feature.

You often have a separate administration role for system administration. The people in the role have responsibility for the Learning Management System (LMS) as a **system**. Other roles manage learning or manage user profiles but don't manage the health of the LMS.

23.1 Learning Administrator Management

Learning **system** administrators often need to do lightweight, routine maintenance for Learning administrators.

After you have implemented SAP SuccessFactors Learning, after you have set the security roles of administrators and defined the personas of your administrators, you often need to simply administer the administrators: you need to unlock the accounts of administrators who forgot their passwords, change the preferences for an administrator, and so on. These kinds of ongoing tasks are separate from implementation work and are usually performed by a different group than performed the implementation.

23.1.1 Creating Administrators in Learning Administration

Create a new administrator account in SAP SuccessFactors Learning Management System.

Procedure

1. Go to *Learning Administration* > *System Administration* > *Security* > *Administrators*.
2. Choose *Add New*.
3. Enter the admin ID, name and email address.
4. Choose a *Security Domian*, and set the password for the administrator.
5. Fill out other fields, if necessary.
6. Choose *Add*.

Next Steps

Assign roles to the administrator.

Related Information

Assigning Roles to SAP SuccessFactors Learning Administrators [page 863]

23.1.2 Updating Learning Administrator Basic Account Information

If you're a learning system administrator, you might be responsible for updating the accounts of learning administrators to make sure that they can log in, that their personal information is correct, and that their preferences are correct.

Prerequisites

An administrator accout is created.

Context

If you're responsible for a team of learning administrators, you often need to update their accounts or help them keep their preferences current. Although most administrators can manage their information by clicking their preferences button , they might need help.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Administrators*.
2. Search for the administrators that you want to update and open their record.
3. To set their personal identification, including name and e-signatures, go to *Summary*.
4. To change an administrator's preferences for language, currency, and so on, go to *Preferences*.

Next Steps

You might need to change an administrator's role as part of changing their personal information. This is rare after implementation, but if the administrator changed job responsibilities, you might also need to change what the administrator can access.

Related Information

Assigning Roles to SAP SuccessFactors Learning Administrators [page 863]
Creating Administrators in Learning Administration [page 861]

23.1.3 Assigning Roles to SAP SuccessFactors Learning Administrators

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

Context

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

Procedure

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

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

23.1.4 Generating a Client Secret for Learning Administrator Accounts

Generate a client secret for administrators if you want to use the administrator account to call SAP SuccessFactors Learning Web Services.

Context

> **Note**
>
> You should discontinue using the SuccessFactors Learning token server and start using the more secure platform token server or openID connect authentication solution.

The client secret for administrators is for client-server relationships. You use it for almost all web service calls so that you can track the call to a single account. If however, you call server to server, use the client secret in *System Administration* > *Configuration* > *OAuth Token Server*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Security* > *Administrator Management*.
2. Find and open the account of the administrator to that calls the web services.
3. Choose *Generate a new Client Secret* in *Summary*.

Next Steps

Copy the hash value for the team building the client-server web service calls. The team need the administrator ID and the client secret.

Related Information

Authentication Using OAuth 2.0
Authentication Using OpenID Connect (OIDC)

23.1.5 Changing the Administrator View of Learning Pages

You can change how learning administrators experience administration pages by removing parts of the pages you aren't using.

Context

In Learning, the administration view of major entity types is highly configurable so that you can remove clutter from administrators' views. During implementation, you go through the major entities and remove all the fields that you don't need. For example, some fields of the user entity are specific to U.S. Federal customers, others for customers whose qualifications are validated by a third party, and still others for customers using performance features like competencies.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Configuration* > *Entity Configuration*.
2. The *Entity Configuration* has a search bar that is used to filter results. You can search and filter *Entity Configurations* by *Section Name* or *Field Name*. The search results can be cleared by refreshing the search bar or by clicking the *Filter* icon.

   When you open the *Entity Configuration* for an entity, the *Filter* icon is available with the default view set to display all the records. You can filter the records by *All*, *Required Only* and *Display Only*. Once you filter the records, you can also use the search bar to refine the results.
3. In *Select an entity to configure*, select one of the major entity pages to configure.

Choice	Page you are changing
Assignment Profile	*Manage User Learning* > *Assignment Profiles*
Library	*Learning Activities* > *Libraries*
Coupons	*Finance* > *Coupons*
Curriculum	*Learning Activities* > *Curricula*
Item	*Learning Activities* > *Items*
Prepaid Account	*Finance* > *Prepaid Accounts*
Class	*Learning Activities* > *Classes*
Free-of-Charge Subscription	*Finance* > *Free-of-Charge Subscriptions*
User	*People* > *Users*

   The *Entity Configuration* loads on the *Item* entity by default.

   There are other entities available in the drop-down list in alphabetical order.

You can select the *Entity Configuration* for other entities from the drop-down list to view and edit the sections and fields, including custom fields

The following fields are system-required fields and will be marked as Yes for both *Required* and *Display* by default. This cannot be changed by the user.

- *User*: Role, Security Domain, License User type
- *Assignment Profile*: Security Domain
- *Catalog*: Security Domain
- *Item*: Security Domain
- *Curriculum*: Security Domain
- *Class*: Security Domain, Time Zone
- *Coupon*: Coupon Type, Name, Security Domain
- *Prepaid Account*: Domain, Name, Balance, Currency
- *Free of charge subscription*: Title/Name, Domain, Free of charge subscription type

If you refresh the *Entity Configuration* page, any changes made and not saved are discarded when the page reloads.

4. In *Entity Configuration* you can remove any fields that you want to hide from all administrators.
5. In *Entity Configuration*, select the *Required* box for any field that you want to require administrators to provide a value for.

   When you click on the *Required* checkbox for a field, the *Display* checkbox is also automatically marked and cannot be modified.

   You can unmark a *Required* checkbox for a field, unmark the *Display* checkbox, and save the settings, if desired.

   You can edit the *Entity Configuration* and save your changes.

   You can use the checkboxes for *Display* to show only the fields that you want.

   The *Header* section in *Entity Configuration* for all entities is read-only and the administrator can control only it's visibilty using the *Display* checkbox.

23.1.5.1 How SAP SuccessFactors Learning Orders Fields When you Change Administrator Views of Records

When you order fields or tabs for administrators in SAP SuccessFactors Learning, they order left to right, top to bottom.

In SAP SuccessFactors Learning, you can change administrator's views of some important record types, like user and learning item. Among the things that you can change is the order of fields and tabs. The order of tabs is simple (when you move a tab to the top of the *Display* list, it appears on the top of the tabs), the order of fields is a little more complicated because the fields display in two columns.

When you set the order of fields in the *Record* tab, the order is rendered in two columns. The first field is rendered in the top left, the second is rendered in the top row, second column, the third is rendered in the second row, first column, the fourth is rendered in the second row second column, and so on.

For example, imagine that you ordered the user record fields as follows:

- First Name
- Middle Initial
- Last Name
- External User ID

When it is rendered, administrators see the following:

First Name	Middle Initial
Last Name	External User ID

Related Information

Changing the Administrator View of Learning Pages [page 865]

23.1.6 Restoring the Default Administrator Views of SAP SuccessFactors Learning Pages

You can modify some page views of Learning records to remove unused fields and tabs. If you mistakenly remove a field or tab, you can restore the default view.

Context

When you restore the configuration of a record, you revert the **default** configuration (its system-supplied configuration). Administrators can click *Personalize* to create their own views based on the default view. Learning does **not** revert any personalizations.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Configuration* > *Record Configuration*.
2. In *Select a record to configure*, select one of the major record pages to restore.

Choice	Page you are changing
Assignment Profile	*Manage User Learning* > *Assignment Profiles*
Library	*Learning Activities* > *Libraries*

Choice	Page you are changing
Coupons	*Finance* > *Coupons*
Curriculum	*Learning Activities* > *Curricula*
Item	*Learning Activities* > *Items*
Prepaid Account	*Finance* > *Prepaid Accounts*
Class	*Learning Activities* > *Classes*
Free-of-Charge Subscription	*Finance* > *Free-of-Charge Subscriptions*
User	*People* > *Users*

3. Click *Restore Configuration*.

23.1.7 Administrator Management Summary Fields

These are the fields that appear in *System Administration* > *Security* > *Administrator Management* > *Summary*

This Field...	...Is Used as Follows
Last Name, First Name and Middle Initial	This is the administrator's family name, given name, and middle initial.
Email Address, Reply To Address, and Email Nick Name	Values passed to the SMTP server for communication involving the administrator. For example, when an administrator sends ad hoc notifications in the ad hoc notification wizard, these fields appear to the user who receives the communication.
Last PIN Reset Date	This is the date the administrator's personal identification number (PIN) last changed. Only the administrator himself/herself can change the PIN, but you can force an administrator to reset it.
Reset Pin	If you select this, the administrator must reset his or her PIN the next time he or she logs in.
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.

This Field...	**...Is Used as Follows**
Related User	Add a related user if you want the administrator to see the *Home* tab as well as the *Admin* tab when he or she logs in to SAP SuccessFactors Learning. The administrator "becomes" the related user when he or she clicks the *Home* tab. First, you create a related user is a user record in *People* > *Users*. Then go to *System Administration* > *Security* > *Adminstrator Management* > *Summary*, and in the *Related Users* field, select the user you created.
Locked	Locks the administrator. Locked administrators cannot log in to SuccessFactors Learning. If an administrator record is locked, any report jobs scheduled by the administrator will be disabled. Unlocking the administrator will not reschedule the reports. That must be done manually.
Super Admin	Identifies the Administrator as a Super Admin. Super Admins are defined by using the Super Admin Access tool in Success-Factors platform.

23.1.8 SAP SuccessFactors Learning Administrator Management Preferences

These preference settings control the language, currency, and time preferences.

In the *System Administration* > *Security* > *Administrator Management* > *Preferences*, you can set the locale preferences of administrators. Administrators can set these same preferences, on their own, in *Preferences*.

This Field...	**...Is Used as Follows**
Active Locale ID	This is the active locale ID sets other preferences, including the language that the administrator sees on the user interface.
Currency ID	This is the currency of the administrator. When administrators see costs in "their currency" they see it in this currency.
Time Zone ID	This is the time zone of the administrator.
Always display Classes in the Time Zone	If you select this checkbox, then when administrators look at start and end times of classes (including segments) they see them in their own time zone instead of the time zone of the region where the scheduled offering is taking place.
Update the Locale Format Options	The locale format options are inherited from the administra-tors' locale ID.

23.1.9 Administrator Display Properties in LMS_ADMIN

This topic groups topics that describe the ways you can use LMS_ADMIN system properties to change the way administrators experience the SAP SuccessFactors Learning Administration environment.

Administrators log in to SAP SuccessFactors Learning Administration to manage end users, learning items, and performance. They are a completely different user group than end users, even though they might have a related user ID and also log in to the user environment.

Tab Display

Property	Description
`userUILazyPersistence` `userUIPreferencesHandler`	If the `userUILazyPersistence` property is set to true, the administrator's preferences for tab display are not immediately persisted into the database. The `userUIPreferencesHandler` property contains the Java class that handles the tab display preferences. Do not change the value of the `userUIPreferencesHandler` property.
`displayModuleTabsInAlphabeticalOrder`	The `displayModuleTabsInAlphabeticalOrder` property, when set to true, shows administrator tabs in alphabetical order, but with the Summary tab always first. When set to false, the tabs display in their 6.2 and previous order.

User Registration/Learning Plan Display

Administrators can view user learning plans. You can set the time display for the administrator. The administrator can see the learning plan times (and dates) in their own time zone or the time zone of the end user (the "learner").

Property	Description
`learningPlanDisplayInLearnerTimezone`	Set the `learningPlanDisplayInLearnerTimezone` property to true to show the administrator the learning plan times in the end user's time zone. Set to false to show the administrator the learning plan times in the administrator's time zone.
`allowAdminToModifyRegistrationFormCustomColumns`	When set to true, administrators can modify custom field entries when registering users for classes. An additional setting allows users to overwrite the values that an administrator enters.

Administrator Limits

Administrators use the Copy Class wizard to create multiple, recurring copies of classes. For example, if an administrator wants to create a class that meets every Monday for the first 10 weeks of the year, he or she could create a class for the first Monday of the year and copy the class to the other 9 weeks.

Administrators can inadvertently create hundreds of classes using the Copy Class Wizard. Therefore, you can limit the number of copies an administrator can create when running the wizard. For example, if you set the limit to 5, then the administrator who wants to make10 copies would have to run the wizard twice. If administrators run the wizard to make copies in excess of the limit you set, they see an error: The parameters you are specifying will create 10 copies of this schedule instance. The system has been configured to limit administrators to 5 copies.

Likewise, an administrator can create training request seats. You also want to set a reasonable limit to prevent the administrator from overwhelming the database.

Property	Description
`scheduleCopiesLimit`	The `scheduleCopiesLimit` property defines the number of copies administrators can make of a class any one time they run the Copy Class wizard.
`maxNumberOfTrainingRequestSeats`	This property limits the amount of training request seats an administrator can create. By setting a reasonable limit, you prevent administrators from overwhelming database. The default Value is 500, the minimum value is 1 and the maximum value is 10000.
`exportExpiration`	This property sets the maximum number of days that an administrator has to download their export results from the export tool. After the number of days set in this property, the administrator is no longer able to access the result. The default and recommended setting is 3. The value can be between 1 and 30.

Security Domain Restrictions

Property	Description
`enforceSecurityDomainRestrictionForMarkingAttendance`	This property, when enabled, applies security domain restrictions configured for the *Edit Class* permission to the *Mark Attendance* action. This ensures that only administrators included in the associated Security Domain Group can apply changes to class attendance. By default, this setting is **`false`**, allowing users with the *Edit Class* permission to mark attendance, regardless of the security domain restrictions. To enforce domain restrictions, set this property to **`true`** and ensure the administrator's role includes the *Edit Class* permission with specific Security Domain Group restrictions.

23.2 Learning User Experience Configuration

Learning system administrators can configure the learning experience of learners.

Some Learning user experience is configurable by system administrators. You can, for example, add custom Learning pages or you can add quick links to the Learning page. You typically set your user experience for Learning when you first implement it and revisit the configuration from time to time.

> **Note**
>
> Learning inherits themes like any other part of the application.

23.2.1 Placing Learning Users into Security Roles

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

Prerequisites

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

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

Context

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

Procedure

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

4. Click *Save*.

Next Steps

Execute changes for the assignment profile.

Related Information

Creating an Assignment Profile [page 377]
Assignment Profile Process for Bulk Assignment [page 377]
Executing Changes for Assignment Profile Rules [page 382]
Manually Updating Assignment Profiles [page 383]
Assignment Profile Propagation Status [page 385]

23.2.2 Adding Learning Easy Links

Add easy links to create a link on users' *Links* tile. Links are URLs that your users frequently visit.

Context

If your users need to visit a URL frequently, then consider adding an easy links to that URL. When you provide a URL for an easy link, the user interface makes that link available in users' *Links* tile. You can add both external links (for example, `http://www.sap.com`) or internal links to approval processes or collections.

Procedure

1. Go to Learning Administration and then go to *System Administration* > *Application Administration* > *Easy Links*.
2. In the *URL* column, add the link that you want the user to go to by clicking the easy link.

   Make a note of which easy link row you added your URL to. For example, *User Easy Link 1* or *User Easy Link 2*.

   The URL that you provide can be relative to the current context, a direct link, or an explicit path to an external URL (for external URLs, you must include "http://" or "https://").

> **Note**
>
> When administrators configure links, the links are numbered and display in that numerical order. For users, the label values determine the order in which links display on the user's tile. Link label values are case-sensitive and display alphanumerically for users.

3. Go to *References* > *Manage Labels* > *Labels*.
4. In *Label ID*, enter **`data.menu.EasyLink`**, and then click *Search*.
5. Look in the *Label ID* column to locate the easy link that you added the URL to, and then click its *Edit* button.

   For example, if you added the URL to *User Easy Link 1*, look for data.menu.EasyLink1.
6. Click *Locales* and then add a translation for every locale.

   Users see, for their language, the text you enter for that language's label value.
7. Click *Apply Changes*.
8. Go to *System Administration* > *Security* > *Role Management*.
9. In *Role Type*, filter by the role type *User*, submit the filter, and then search.

   Most organizations use only one user role for all users in their Learning application. You might, however have multiple roles. If you see multiple user roles in the search results, you must add easy link permission access to every role that has users who should see the easy link.
10. Edit the user role and then go to *Permissions*.
11. Expand *Personal* and verify that you see the easy link number that you added.

    For example, if you added the URL to *User Easy Link 1*, then verify that you see *Access Easy Link 1*.

    If you do **not** see access to the easy link you added, click *add one or more from list* to add it back. Without the permission, users in the role aren't able to access the easy link.

23.2.3 Integrated Learning Settings for the New Learning Experience

The *Integrated Learning Settings* page in *Learning Administration* contains settings to control specific behavior in the new Learning experience and displays the current status of features.

The status of integration between Learning and platform, and readiness for enhanced search and personalized recommendations also display in separate sections on this page.

23.2.4 Adding Custom Tiles

Add custom tiles if you have information to share with SAP SuccessFactors Learning users that doesn't exist in the system tiles.

Procedure

1. Log in to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration* > *Landing Page Settings*.
2. Choose *Create Custom Tile*.
3. Type a unique name for your purposes in *Title Name*.

   The *Title Name* appears to administrators. *Tile Title* appears to your users.
4. In *Show Tile For This Group*, enter the Organization ID or User Group ID that should see the tile.

   If you want to show the tile to all users of your system, choose Organization ID, select the root organization (the organization at the top of your hierarchy), and then check the *Include suborganizations* checkbox.
5. In *Show Tile On These Dates*, select the lifespan of the tile.
   - To make the tile visible to users until you decide to delete it from the landing page, select *All Dates*.
   - To make the tile visible to users on a date in the future and to make it visible until you delete it from the landing page, select *Only certain dates*. Then, type the date that it should begin to be visible in *From* and don't add a date in *To*.
   - To make the tile visible to users on a date in the future and make it expire on a specific date, select *Only Certain Dates*. Then, type the date that it should begin to be visible in *From* and the date that it should be removed in *To*.
6. Select a default size for the tile in *Tile Display Size*.
7. In *Configure tile content for the selected locale*, select the language that you want to edit.

   One individual tile can have content in more than one language. When you select the language, you're editing the tile in that language.
8. In *Tile Title*, type the title that users see at the top of the tile.
9. In *Description*, type a description that sells the tile to users if they look it up in the tile browser.
10. In *Main Content*, use the editor to add content to the body of the tile.

Next Steps

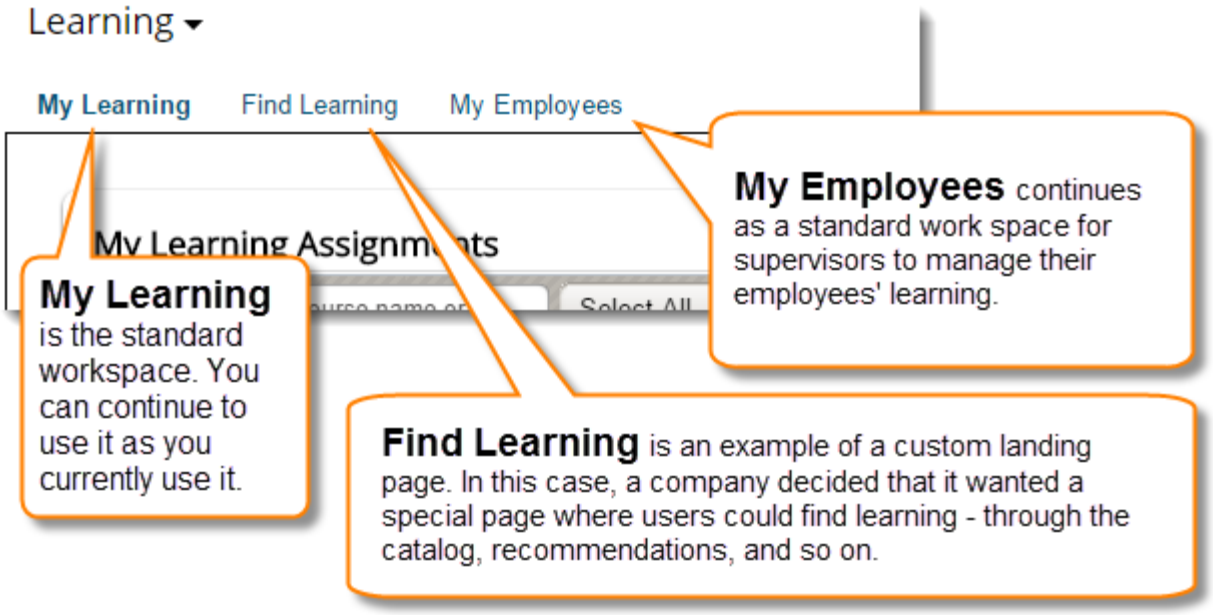
After you add the tile, add content to the tile.

23.2.4.1 Setting the Behavior of Landing Pages

Set the behavior of landing pages to control how users interact with all landing pages.

Context

A landing page is a work space where users accomplish a task in SAP SuccessFactors Learning.



Examples of Landing Pages

Procedure

1. Log in to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration* > *Landing Page Settings*.
2. Click *Settings*.
3. Set *Screen display width* to the pixel width of your users.

   To decide on your width, consider the workstations that your employees use. If you have a mix of workstation screen sizes, select the smaller number so that you don't disadvantage those users. Additionally, do **not** consider tablet or phone screen sizes because this setting affects only the browser view of the tiles.
4. To prevent users from moving tiles within a landing page, select *Lock Tile Locations*.

   Lock the tile locations if you want predictability in your landing pages. Predictability can help, for example, when you're training or troubleshooting with users: you can predict where their tiles will be so you can help them through trouble. Unlock the locations if you want to give your users more freedom about how they arrange their work spaces.
5. In *Edit Page Sequence*, use the up and down arrows to change the order of the landing pages.

Higher pages appear to the left in left-to-right languages (like English or French) and to the right in right-to-left languages (like Hebrew or Arabic).

> → Remember
>
> SAP SuccessFactors has a language setting in the users' menu, in *Options* > *Change Language* and also specific to the Learning area (*Learning* > *Options and Settings*). Because the landing pages are outside of the Learning frame, they obey the settings in *Options* > *Change Language*.

6. Click *Save*.

Next Steps

You can add custom landing pages create new work spaces for users.

Related Information

Adding Custom Landing Pages [page 877]
Force Resetting Users' Landing Page Layouts [page 879]

23.2.4.2 Adding Custom Landing Pages

Add custom landing pages to SAP SuccessFactors Learning create work spaces for users.

Context

A custom landing page can contain tiles that make sense for the work space. For example, if you create an Informal Learning Custom Landing Page, you can add the QuickGuide tile, Recommendations tile, and Collections tile. Or, if you aren't using QuickGuides, you can add only the Recommendations tile and Collections tile. You control the set of tiles in the page. A custom landing page will only be visible for the end user if it's active and the user has access to the standard or custom tiles on the custom landing page.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration* > *Landing Page Settings*.
2. Click *Add Custom Page*.

When you first add a custom page, it's inactive. Because it's inactive, users can't see it. When you're ready, you can activate the page.

3. In *Page Name*, type the name of the custom page as you want it to appear to the user.

   Consider a short phrase that assumes the verb "Manage" before the phrase. For example, the existing landing pages of *My Learning* and *My Team* help users manage their learning or their direct reports. If, for example, you added a landing page that allowed users to manage recommendations, you could call it My Recommendations. Or if you added a page dedicated to browsing the library, you call it My Library.

4. Click  to translate the title into multiple languages, or locales.

   This step is recommended for all customers whose users speak different languages and who have installed those languages. If you support multiple languages, and you don't add a new title for a language, then users of that language fall back on the default language. The default language is usually English.

Next Steps

After you set up your landing pages, add system tiles or custom tiles to the page. Also, if you've added a custom landing page, you might decide to change the settings of your landing pages to reorder the pages.

Users can't see the page until you activate it.

Related Information

Translating Strings in Learning [page 1350]
Setting the Behavior of Landing Pages [page 876]
Adding System Tiles to Landing Pages [page 878]
Adding Custom Tiles to Landing Pages [page 880]
Activating Custom Landing Pages [page 881]

23.2.4.3 Adding System Tiles to Landing Pages

Add system tiles to landing pages to build a work space for users to interact with SAP SuccessFactors Learning by using the system-provided tiles.

Prerequisites

If you want to add tiles to default landing pages, there's no prerequisite. However, if you want to create new work spaces, create a custom landing page. Adding Custom Landing Pages [page 877]

Procedure

1. Log in to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration* > *Landing Page Settings*.
2. In *Pages*, select the landing page that you want to change.
3. Choose *Add Tile*.
4. Select the required tiles from the system tiles, and then choose *Select*.
5. To change the location of the tile on the page, hover your mouse over the title of the tile and then choose the arrows to move it up or down.
6. Select the default size of the tile in *Default Size*.

   Users can adjust the size of the tile to customize their work space. The default size is just the size of the tile when users start.

23.2.4.4 Force Resetting Users' Landing Page Layouts

Force reset users' SAP SuccessFactors Learning landing pages if you roll out new tiles to landing pages and want to force users to adopt them.

Context

You can allow users to customize SAP SuccessFactors Learning landing pages by adding tiles, changing their sizes, removing tiles, and so on. Sometimes, however, you might need to force users into a consistent landing page. In these cases, you can force reset users' landing pages.

For example, if you decide to begin using the recommendations tiles on *My Learning* and you want to force all users to adopt the recommendations tile as a start, you can force reset *My Learning*. Users can remove the recommendations tiles, but they are at least forced to begin seeing them and to remove them.

> → Tip
>
> A stronger version of force reset is in the settings. Extending the example, if you want to force all users see the recommendations tiles and you want to prevent them from removing it, you can lock their tiles in *System Administration* > *Application Administration* > *Landing Page Settings* > *Settings*.

Procedure

1. Log in to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration* > *Landing Page Settings*.
2. Open the landing page that you want to force reset.

3. Click *Reset Tile Location to Default*.

Related Information

Setting the Behavior of Landing Pages [page 876]

23.2.4.5 Adding Custom Tiles to Landing Pages

Add custom tiles to landing pages if you have information to share with SAP SuccessFactors Learning users that doesn't exist in the system tiles and you want that information to appear under a specific work space.

Prerequisites

Create the custom tile. Adding Custom Tiles [page 875]

> **Note**
>
> By default, when you create a custom tile, the system adds it to the current landing page (the page that is open when you click *Create Custom Tile*. If you didn't intend to add the custom tile to that page, delete it from the page.

Procedure

1. Log in to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration* > *Landing Page Settings*.
2. Open the page that you want to add the tile to.
3. Click *Add Tile*.
4. Select the custom tile.
5. Click *Select*.

Related Information

Adding Custom Landing Pages [page 877]
Adding System Tiles to Landing Pages [page 878]

23.2.4.6 Activating Custom Landing Pages

Activate custom landing pages so that users see the page as global navigation in the *Learning* space.

Prerequisites

Add a custom landing page. Adding Custom Landing Pages [page 877]

Procedure

1. Log in to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration* > *Landing Page Settings*.
2. Click the landing page that you want to activate.
3. In *Status*, select activate.
4. In *Start Date*, select a date when the page should become active to users.

   If you select a date of today or in the past, users see the landing page the next time they log in. If you select a date in the future, then they see it the first time they log in on or after the date. Select a date in the future if you plan to roll it out and need time to communicate with your users.
5. Click *Save*.

23.2.4.7 SAP SuccessFactors Learning Landing Pages

SAP SuccessFactors Learning landing pages create a work space for users where they can do tasks like find recommended learning, manage their own learning, or manage the learning of their employees.

Landing pages are the Global Navigation links that appear when users select *Learning* in the Module Picker. You can think of Global Navigation links (or "landing pages" in this case) as places where users “land” to do some work associated with SAP SuccessFactors (SAP SuccessFactors Learning in this case). For example, they might need a work space to manage the content that they create, like collections and quick guides. Or, they might need a landing page to manage the courses that were recommended to them. Each customer defines employee work spaces slightly differently, but we recognize some commonality.

Because we understand that customers commonly want work spaces for users to manage their own learning, supervisors to manage employees' learning, and instructors to manage their course load, you always have three landing pages for specific work. For many customers, these three landing pages are enough, and the tiles that are installed on those pages by default work well for them:

- A home landing page, which appears to users as *My Learning*. On this page, users can manage their assignments, check learning history, and so on.
- A manager landing page, which appears to users as *My Team*. On this page, managers can manage their employees' learning, approve learning for their employees, and so on.

- An instructor landing page, which appears to users as *My Classes*. On this page, instructors can manage their teaching tasks, see upcoming courses that they are scheduled to teach, post the results of the courses, and so on.

Because we understand that customers work slightly differently, you can create custom landing pages and you can add or remove tiles from individual pages. Furthermore, you have some control over how users can interact with the tiles. You can control the settings to allow your users to customize their landing pages or you can enforce consistency.

To manage your landing pages, log in to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration* > *Landing Page Settings*.

Related Information

Setting the Behavior of Landing Pages [page 876]
Adding Custom Landing Pages [page 877]
Adding Custom Tiles [page 875]
Adding System Tiles to Landing Pages [page 878]
Force Resetting Users' Landing Page Layouts [page 879]
Adding Custom Tiles to Landing Pages [page 880]

23.2.5 Adding Default Content Images to SAP SuccessFactors Learning

Add default content images to SAP SuccessFactors Learning if you want to default all new learning activities (for example, items, curricula, and programs) to use your content images instead of the stock images.

Prerequisites

Your role must have the Access Image Configuration permission.

Create an image that matches our content image guidelines.

Context

By default, SAP SuccessFactors Learning includes its own stock images for learning activity images. When administrators create a new learning activity, they see the stock image. You can give learning administrators the ability to overwrite the default images when they create new entities.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Application Administration* > *Images*.
2. Scroll down to *Images*.
3. Locate the entity type that needs a new default image and chose *Upload*.
4. In the *Edit Picture* dialog, choose *Upload*, browse to locate the image, and then select it.
5. Review the image in both aspect ratios and then choose *Close*.

Next Steps

If you make a mistake, choose *Restore Default* in any entity to reset the image to the stock image.

If you want to prevent administrators from adding their own images to an entity, go to *System Administration* > *Configuration* > *Entity Configuration* and unselect the *Display* checkbox for the *Image* and *Image URL* fields for each entity type.

23.2.5.1 Updating Logos in SAP SuccessFactors Learning

Update your logo in SAP SuccessFactors Learning to see a new logo in the SAP SuccessFactors Learning administration environment.

Context

In most cases, you control your logo through themes, centrally in SAP SuccessFactors, so the logo that you change in SAP SuccessFactors Learning is likely to affect only your Learning administration environment.

Procedure

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

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

23.2.5.2 SAP SuccessFactors Learning Stock and Default Images

In SAP SuccessFactors Learning, you can use stock images for things like learning item images or your logo. Alternatively, you can upload your own images.

SAP SuccessFactors Learning uses images for branding and for orientation. Branding images include things like the logo that users see and the banner background to entities. Orientation images include the thumbnail images that users see when they open an entity. These images help them quickly understand that they're looking at a live course, an on-demand course, or a curriculum, for example. As a learning administrator, you can choose these images.

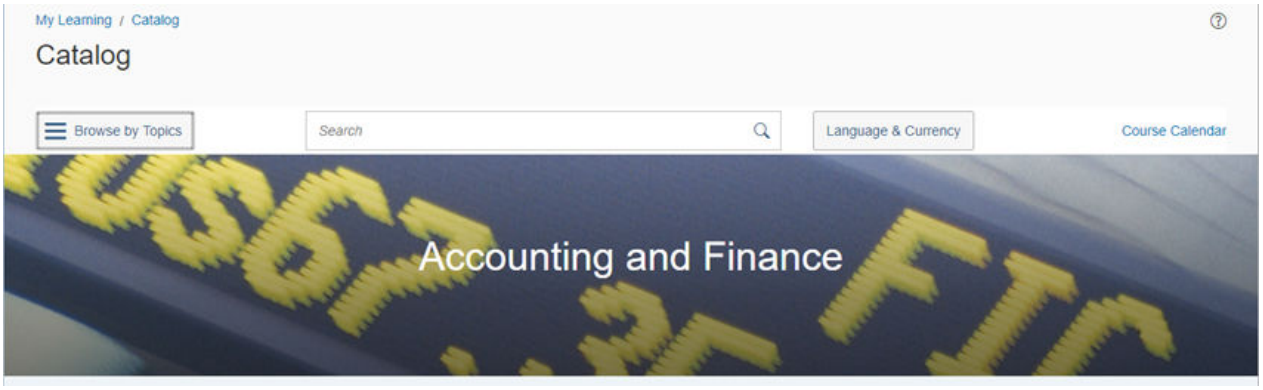
SAP SuccessFactors Learning includes stock images. If you do nothing, your users see the stock images that our user experience team has selected for branding and orientation. If you would like to customize your users' experiences, you can go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Application Administration* > *Images*.

> **Note**
>
> If you don't have access to the Images area, then you don't have the correct permissions, or your company is managing the logo outside of the SAP SuccessFactors Learning administration environment.

23.2.5.3 SAP SuccessFactors Learning Topic Banner Images

A topic banner image in SAP SuccessFactors Learning is a banner that sets context for a page.

In SAP SuccessFactors Learning, you can add banner images to provide thematic context to and between pages, set a visual tone, and provide visual interest. For example, an accounting and finance library topic could show stock numbers on a ticker so that users are visually reminded of the theme of accounting and finance.



Cover Image in Library Category

23.2.5.4 SAP SuccessFactors Learning Content Images

SAP SuccessFactors Learning content images highlight learning content for users.

Content images identify learning activities for users. Images display on cards in the Learning home page, on detail pages for courses and classes, on bookmarks, and in lists like search results. Depending on the location, the image

displays in either 16:9 aspect ratio or 1:1 aspect ratio. A preview of the image displays for each aspect ratio when uploading the image.

23.2.5.5 SAP SuccessFactors Learning Topic Banner Guidelines

Follow our guidelines so that your SAP SuccessFactors Learning topic banner images display as expected across your organization's technology.

Category	Recommendation
Aspect Ratio	16:9
Size (minimum)	1280px wide by 720px high
DPI (minimum)	72
Composition	Select an image that can be cropped and subdued without affecting the meaning of the image. For example, avoid human figures and select images that work horizontally. SAP SuccessFactors Learning adjusts the image for different formats, so you won't always see the image as you compose it in SAP SuccessFactors Learning Administration. Center the focal point of the image for the best results in all conditions.

23.2.5.6 SAP SuccessFactors Learning Content Image Guidelines

Follow our guidelines so that your SAP SuccessFactors Learning thumbnail images display as expected across your organization's technology.

16:9 Ratios

Category	Recommendation
Aspect Ratio	16:9
Size (minimum)	1280px wide by 720px high
DPI (minimum)	72

Category	Recommendation
Composition	Select an image that can be cropped and subdued without affecting the meaning of the image. For example, avoid human figures and select images that work horizontally.

1:1 Ratios

Category	Recommendation
Aspect Ratio	1:1
Size (minimum)	180px wide by 180px high
Size (recommended)	540px wide by 540px high
Dots per inch (DPI)	72
Composition	Select subdued images that allude to the associated content and that have a single, clear focal point that communicates quickly and clearly to the user. Thumbnails are used in combination with text overlays or other foreground elements, so avoid clutter.

23.2.5.7 IMAGE ATTACHMENT System Configuration Properties

The IMAGE ATTACHMENT System Configuration property file contains properties that control the size and type of image that you can upload to the Learning Management System (LMS): images like thumbnails.

IMAGE ATTACHMENT controls the size of images that can be uploaded to the LMS. In the majority of cases, the only images that you upload to the LMS are the thumbnail images that distinguish one learning item or one program from another learning item or program (or curriculum, and so on).

If an administrator attempts to upload an image that is larger than the limit you set here or if an administrator attempts to upload an image that is of a type that you do not allow, then the administrator sees an error. The most common places that administrators upload image files are in one of the records that supports thumbnails (for example, in a learning item) or when uploading a thumbnail image as part of an import. For example, if you upload SCORM content in a .zip file through the content import tool, and if that .zip file contains a thumbnail, then we check to make sure that the thumbnail meets the standards set in IMAGE ATTACHMENT.

This property...	...Is used as follows
`imageAttachmentTypes[<extension>]`	When set to `true`, the LMS supports image files with the extension. The extension is in brackets. For example, if you set `imageAttachmentTypes[jpeg]` to `true`, then the system supports images with a `.jpeg` extension.
`imageMaximumSizePerAttachmentKB`	The maximum size of an image that can be uploaded to the LMS. The value is in KB.

23.2.6 Allowing Managers to Remove Alternate Managers

Allow managers to remove alternate managers when you want to give more power to managers to handle the temporary management of their teams.

Context

Alternate managers are often assigned on a temporary basis. For example, if a manager goes on maternity leave, her employees might be assigned an alternate manager: someone who can manage her team's training while she's out. When she returns, she should take over her team's training again. She can remove the alternate manager so that the person no longer receives notification emails, no longer sees the employees in *My Team*, and so on.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Application Administration* > *User Settings*.
2. Select *Allow Maanger to remove any Alternate Manager*.

Related Information

Managers in SAP SuccessFactors Learning [page 625]
Alternate Managers in SAP SuccessFactors Learning [page 627]
Manager Delegate SAP SuccessFactors Learning [page 628]
Human Resources Business Partner in SAP SuccessFactors Learning [page 627]

23.2.7 Warning Supervisors of Employees Who are Already Engaged in a Course

Use Assignment Warning to tell supervisors, at the point of assignment, which employees are already engaged in completing the course.

Context

To warn supervisors of employees who are already engaged in the course, you use a feature called Assignment Warning. When you enable it, and when supervisors attempt to assign courses to users who are already involved in the course (assigned or completed), SAP SuccessFactors Learning warns supervisors that they are about to duplicate an assignment. Assignment Warning [page 891]

Procedure

1. Go to SAP SuccessFactors Learning and then go to *System Administration* > *Application Administration*
2. In *Assignment Warning*, select *Warn the supervisor for recent assignments/registrations, completions or unmet prerequisites during assignment*.
3. In *Threshold for Items/Programs*, type the number of days that represent a threshold for learning item and program completion.

   For example, if you type 30 in *Threshold for Items/Programs*, then SAP SuccessFactors Learning looks back over the last 30 days for learning item and program completions. When a supervisor attempts to assign a learning item or a program, SAP SuccessFactors Learning gets the list of assignees, looks for users who are assigned and have started the learning item or program, and looks for users who have completed it in the last 30 days. If a user fits these conditions, the supervisor sees a warning for that user.
4. In *Threshold for Classes*, type the number of days that represent a threshold for classes.

   For example, if you type 60 in *Threshold for Classes*, then SAP SuccessFactors Learning looks back over the last 60 days for scheduled offering completions. When a supervisor attempts to assign a class, SAP SuccessFactors Learning gets the list of assignees, looks for users who are assigned and have started the class, and looks for users who have completed it in the last 60 days. If a user fits these conditions, the supervisor sees a warning for that user.
5. Click *Apply Changes*.

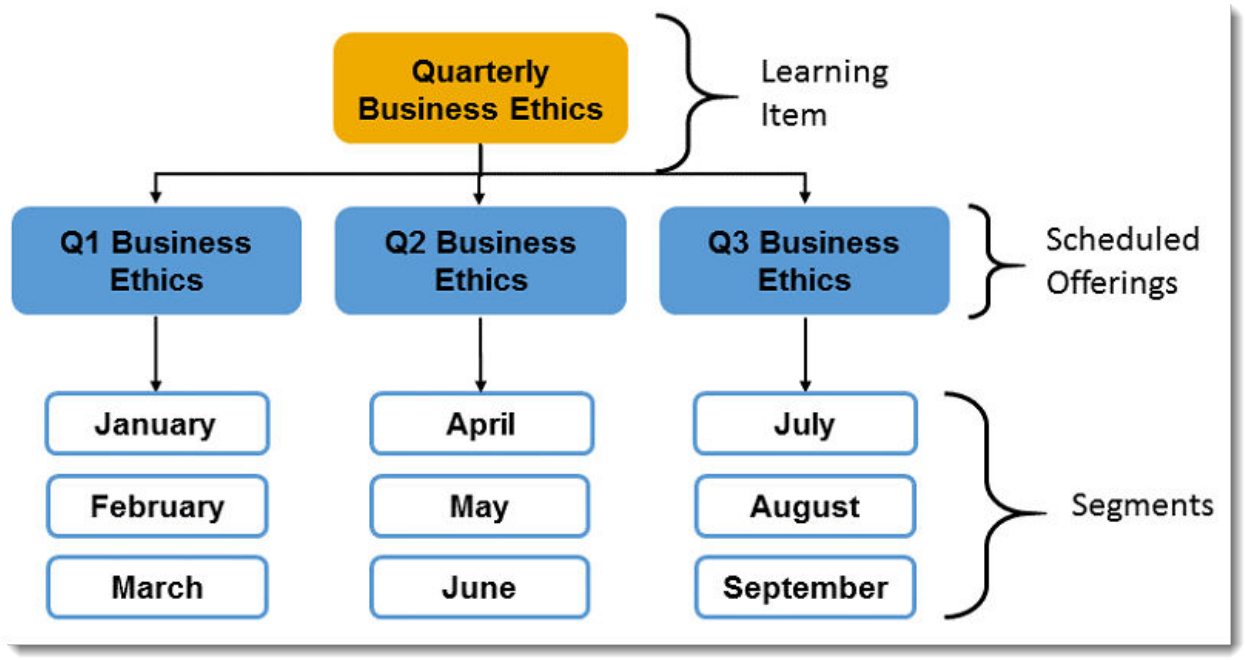
Related Information

Assignment Warning [page 891]
Assignment Warning Thresholds [page 891]
Assignment Warning for Series of Individual Classes [page 889]

23.2.7.1 Assignment Warning for Series of Individual Classes

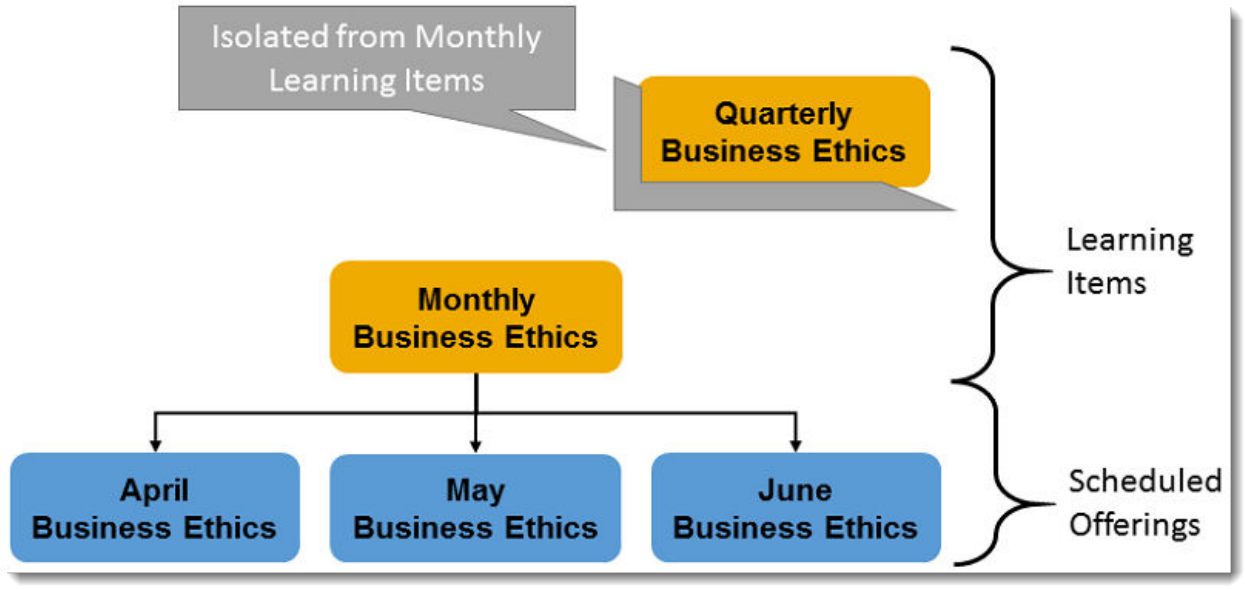
If you create a series of classes - as opposed to using segments in a single class - then you need to understand how Assignment Warning works for your case.

When you want to track a class with multiple parts, we recommend that you create segments. For example, if you have one course, called Business Ethics, and you have lined up three monthly seminars with ethics experts, schedule a single offering called Business Ethics with three segments. A Q2 Business Ethics class would hold segments in April, May, and June. When you post completion for the Q2 Business Ethics course, you mark the employees as attending each segment and they see it (and the associated learning item) complete in their learning history.



Recommended Approach to Classes

However, we understand that some customers have designed a different system for a series of classroom meetings. Instead of creating a single Q2 Business Ethics offering with three segments, they create three different classes: Month One Business Ethics, Month Two Business Ethics, and Month Three Business Ethics. They track attendance outside of SAP SuccessFactors Learning. Inside SAP SuccessFactors Learning, they post completion for each individual class. When users attend all three, they post completion for those users in a completely separate learning item.



Series of Individual Classes

In this situation, you can run into this scenario:

1. Administrators set *Threshold for Items/Programs* and *Threshold for Classes* to 30 days.
2. An employee completes the Month One class and makes an argument that he or she shouldn't have to attend the other months. For example, the employee could agree to attend a similar course at a local school.
3. An administrator accepts the argument and uses the learning event recorder to complete learning for the Quarterly Business Ethics learning item. Remember, the Quarterly Business Ethics learning item is **not** tied to the individual classes.
4. The employee's supervisor decides to assign the Month Two or Month Three class or assign the unattached learning item to the employee who was granted the exception. Assume that the supervisor is assigning more than 30 days after the administrator recorded the learning event.
5. In this case, the supervisor does **not** see a warning because:
   - The employee's completion status of the unattached learning item occurred more than 30 days ago. Because the employee is not working through segments of a single learning item/class, SAP SuccessFactors Learning can't know that the user is currently enrolled.
   - The employee was never enrolled in the Month Two and Month Three classes. Because the classes are treated as totally separate offerings, SAP SuccessFactors Learning cannot know that they are part of a series.

Related Information

Assignment Warning [page 891]
Warning Supervisors of Employees Who are Already Engaged in a Course [page 888]
Assignment Warning Thresholds [page 891]

23.2.7.2 Assignment Warning Thresholds

Set assignment thresholds so that SAP SuccessFactors Learning knows how far in the past to look for completions when warning supervisors that users have already completed a course.

When you set assignment thresholds, think about how long, generally, you long you expect your employees to retain what they have learned in their classes, learning items, and programs. Set the thresholds to how long you expect users to retain that knowledge. That way, you warn supervisors if users have completed a course within the time frame that you expect them to remember the content. You are saying "These users do not need to complete this course again because we expect that, having taken it within the threshold, they should remember the contents of the course".

For example, if you type 30 in *Threshold for Items/Programs*, then SAP SuccessFactors Learning looks back over the last 30 days for learning item and program completions. When a supervisor attempts to assign a learning item or a program, SAP SuccessFactors Learning gets the list of assignees, looks for users who are assigned and have started the learning item or program, and looks for users who have completed it in the last 30 days. If a user fits these conditions, the supervisor sees a warning for that user.

For example, if you type 60 in *Threshold for Classes*, then SAP SuccessFactors Learning looks back over the last 60 days for scheduled offering completions. When a supervisor attempts to assign a class, SAP SuccessFactors Learning gets the list of assignees, looks for users who are assigned and have started the class, and looks for users who have completed it in the last 60 days. If a user fits these conditions, the supervisor sees a warning for that user.

Related Information

Assignment Warning [page 891]
Warning Supervisors of Employees Who are Already Engaged in a Course [page 888]
Assignment Warning for Series of Individual Classes [page 889]
User Settings [page 917]

23.2.7.3 Assignment Warning

Assignment warning tells supervisors when a user has recently completed or is enrolled into a course so that supervisors can avoid assigning a course that their employees have just finished or are in the process of finishing.

Assignment warning helps your supervisors avoid mistakes when assigning courses to their employees. At the moment when a supervisor makes an assignment, Assignment Warning looks into the learning history and current assignments of a user. If it finds the same course in the users' learning history or on the users' assignments, it warns supervisors that the employee is currently working on the course. It does not, however, prevent the supervisor from assigning it again.



Supervisor Visibility to Teams

Assignment Warning is particularly useful for large teams: teams where the supervisor or Human Resources Business Partner (HRBP) might not know everyone on the team or might not have daily contact with the team. To understand why, imagine that a company announces a management refresher course for the managers. Some of the managers take the imitative to enroll into or complete the course. The supervisor, however, notices that some of the managers have not been as diligent as others, so she goes to *My Team* to assign the course to team members who have not already engaged the course. At this point, the supervisor doesn't know who has taken the initiative and who has not, so she assigns the course to all her managers. If you enable Assignment Warning, the supervisor sees a warning. It tells her that some of her managers were proactive and already enrolled into or already completed the course. She can take them off the list of employees who get the assignment.

Related Information

Warning Supervisors of Employees Who are Already Engaged in a Course [page 888]
Assignment Warning Thresholds [page 891]
Assignment Warning for Series of Individual Classes [page 889]

23.2.8 Enabling SAP SuccessFactorsCourse Catalog 3.0

Enable course catalog 3.0 to give your users the most recent catalog browsing and searching experience.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Open *CATALOG*.
3. Find `catalogSearch3Enabled` and set it to `true`.
4. Find `catalogBrowseEnabled` and set it to `true`.

   Although this is not required, we recommend that you set this to `true`. It brings users to the new browsing experience where you can showcase interesting courses for them. If you set it to `false`, then they see the search experience when they click *Browse All Courses*.
5. Find `calendar3Enabled` and set it to `true`.

   This enables the course calendar view that matches the look, feel, and functionality of the 3.0 browsing and searching experience. If you set it to `false`, then users see the 2.0 calendar.
6. Click *Apply Changes*.

Next Steps

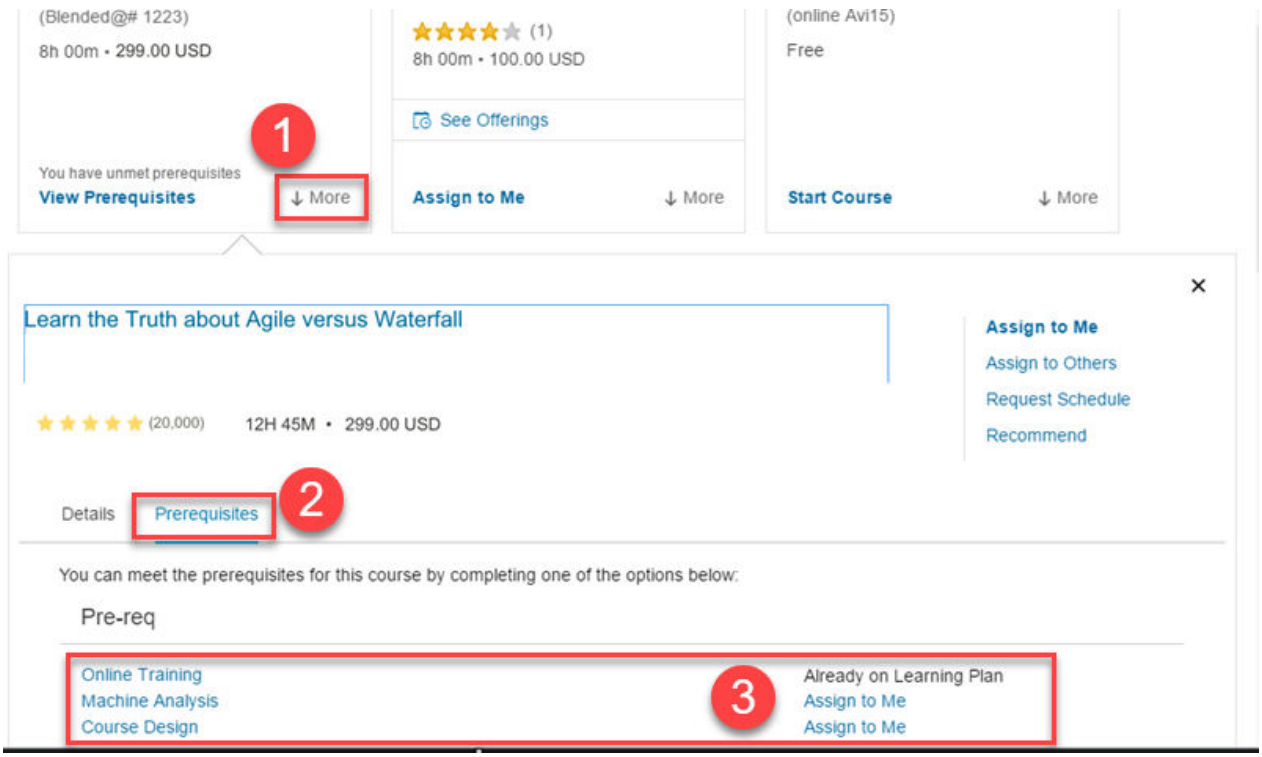
You can also set other catalog behavior in *CATALOG* while you are in the file.

23.2.8.1 Course Catalog 3.0

Course catalog 3.0 is the most recent iteration on how users browse and find learning in their course catalogs.

Course catalog 3.0 is built with Fiori tools and design principles so that users have a very personal and interactive experience for the user to engage in their own development. The design is also consistent with the other areas of the SF suite and other SAP tools. We also wanted users to naturally progress through the catalog, gaining the information they need without leaving the page.

To keep users oriented and give them information as they need it, course catalog 3.0 is built with “cards”. These cards surface the most critical information and actions for the users' current context and hide information that does not apply to the current context. For example, if the course requires the user to order it (purchase it), they see an Order action. If it is a live course, as opposed to an on-demand online course, they see a See Offerings action. And they see that course's relationship to them (that it is already assigned to them, for example).



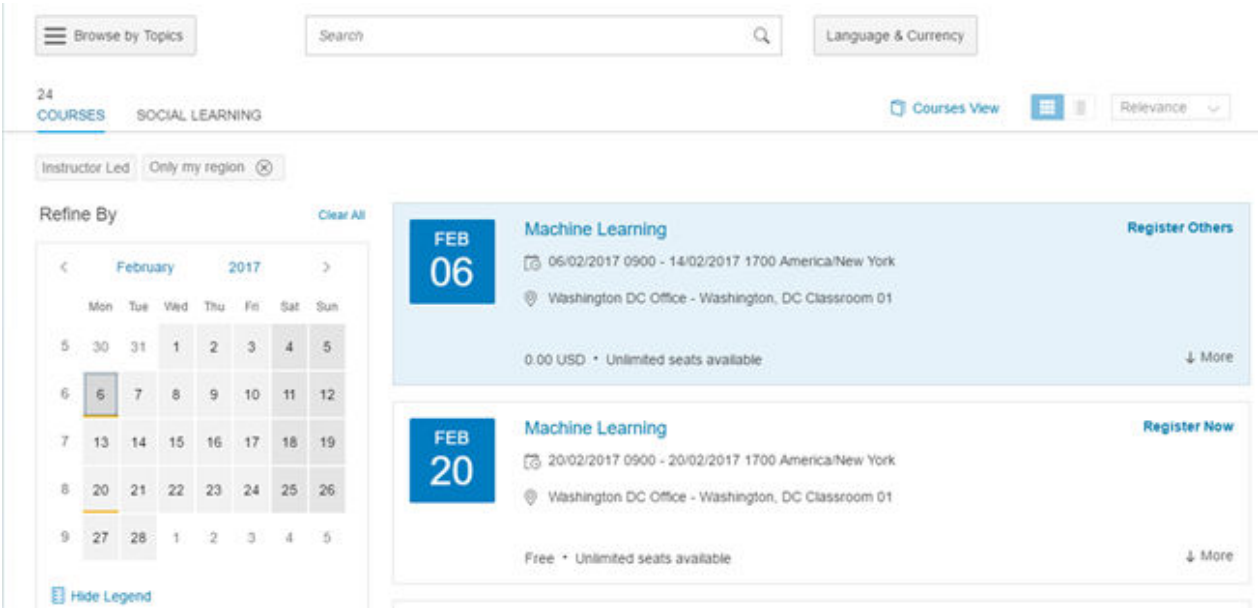
Catalog Cards with Expansion

Cards also include a More action, which expands the card to show important, but infrequent actions and more information. For example, users can see prerequisites for the course when they expand the card. Users are guided to the actions they need to accomplish.

23.2.8.2 Course Calendar 3.0

Course calendar shows users courses by their scheduled dates.

When users go to the course calendar and select date ranges, they can see instructor-led courses that occur during those dates. They can see the details (the location of course, the registration dates, and so on), and they can register themselves or register others (if they have permission).



Course Calendar 3.0

23.2.8.3 Library Configuration Settings

The LIBRARY configuration file controls how users experience the library.

> **Note**
>
> With the exception of `showItemRatingInCatalog`, `enableBrowseLibrary`, and the `librarySearchFilter` settings, the enhanced search in the new Learning experience doesn't honor any of the library configuration settings. These settings only apply to the legacy search.

Property	Description
`catalogSearch3Enabled`	When set to `true`, users experience Catalog 3.0 for search and browse. When set to `false`, users experience Catalog 2.0 for all aspects, including the calendar.
`calendar3Enabled`	When set to `true`, users experience Catalog 3.0 for calendar view. When set to `false`, users experience the Catalog 2.0 calendar.

Properties that Apply to Searching and Browsing the Library

You can configure the way that the library appears to users. Users browse and search their library to find learning items that they're interested in. Along with settings in *System Administration* > *Application Administration* > *User Settings*, these settings control how the user experiences the library. Therefore, we recommend that you test these properties against your unique combination of user interface choices.

Property	Description
`showItemRatingInCatalog`	On the *Items* page, administrators can assign a rating to the item (some number of stars out of a maximum number of stars). If the `showItemRatingInCatalog` property is set to true, users see the rating in the library. The maximum rating is controlled in the `maxItemRatingValue` property.
`displayMaxItemDescriptionLength`	Items have a description, supplied by administrators. Sometimes the description is lengthy. The `displayMaxItemDescriptionLength` property limits the amount of characters that display in the library. **Note** This setting applies to plain-text descriptions in the library, not HTML descriptions.
`enableCatalogFilteredSearchAndIntegratedSocialContent`	In the Q1 2015 release, we have removed this property because Catalog 1.0 is no longer supported. This was the setting that, when set to **`false`**, the system used Catalog 1.0. In effect, this is always set to **`true`**.
`catalogSearchCategories[<category name>]`	You can hide some search categories from the library. For example, if you aren't using QuickGuides, then you can set`catalogSearchCategories[QuickGuide]` to **`false`**. After you save the properties file, users no longer see the QuickGuide category in their libraries **or their search**. Because a **`false`** setting hides both the category and the search results, it's more powerful than hiding search filters. Customers who don't use learning programs and QuickGuides can completely hide any content from their users, even if they're experimenting with the functionality in a production environment. For example, if you aren't sure that you want to use learning programs, but you want to set up a few, you can set `catalogSearchCategories[Programs]` to **`false`** to ensure that they can never appear on a user library.
`catalogSearchFilters[<filter name>]`	Applies to the legacy search experience only. You can hide some search filters from the library. For example, if you aren't using subject areas, you can set `catalogSearchFilters[SubjectArea]` to **`false`**. After you save the properties file, users no longer see the subject area filter in their libraries. Unlike hiding a category, when you hide a filter, users still see the information in their search results. If you hide the subject area filter but a learning administrator adds subject areas to learning item, the user can't filter by subject area but does see the subject area in the search results.

Property	Description
`librarySearchFilters[<filter name>]`	Applies to the enhanced search experience only. You can hide search filters from the library. For example, if you aren't using attributes, you can set `librarySearchFilters[Attribute]` to **`false`**. After you save the properties file, users no longer see the *Attributes* filter in their libraries. With the exception of `librarySearchFilters[Language]`, all values are set to `true` by default, which displays the filter options to learners if there are any learning activities in the library that meet the filter criteria. When the value is set to `false`, the filter option won't display to learners, regardless of whether there are any related learning activities available. For the `[Duration]`, `[Rating]`, and `[Price]` settings, a `false` value also hides the option from the *Sort by* dropdown and any related display elements. The *Learning Type* filter cannot be hidden. **Note** When setting `librarySearchFilter[Category]` to `false`, we recommend setting `enableBrowseLibrary` to `false`, as disabling the *Category* filter affects the *Browse by Category* functionality. If `librarySearchFilter[Category]=false` and `enableBrowseLibrary=true`, an error will occur when the learner uses the *Browse by Category* feature.
`enableCatalogSearchTypeAhead`	By default, this property is set to false. When set to true, the system assists users with their library searches with type-ahead technology: the system predicts the search that the user is entering and it completes the phrase. One reason to set the `enableCatalogSearchTypeAhead` property to **`false`** is that the system doesn't restrict the type-ahead to a users' organization or library. The type-ahead technology makes predictions across the entire learning system. If you're concerned with a user seeing learning item phrases outside their organization or library, set to false.
`catalogSearchSortByOptionsOrder`	A comma-separated list of sorting options that you want to support for users in their libraries. The first sort option in the list is the default sort option: the sort option that users see when they first open the library. Valid values are: • **`Relevance`**: the relevance of score from the system multiplied by the relevance score set on the learning item or curriculum in the library. • **`Title`**: the title of the learning item. • **`Price`**: the price of the learning item. • **`Tier`**: the search tier that you've configured.

Property	Description
`catalogSearchTimeout`	This is the time that users' library searches can run before they time out. Very large organizations can have long library searches that users must refine. By timing out their searches, you prevent them from monopolizing resources. Set the value in milliseconds. We recommend 60000.
`showMobileReadinessIndicators`	When users search for learning items that are flagged as mobile ready, they see an icon telling them that they can see the learning item on mobile devices (if they have the mobile app installed). Mobile ready learning items are designed for mobile devices. This property is enabled by default and cannot be set to **`false`**.
`catalogSearchEngine`	The default setting of **`PROGRESSIVE_RELEVANCE`** for `catalogSearchEngine` enables better search results when users search their libraries. This is because progressive relevance runs a more sophisticated search. The progressive search connects search terms with AND and it weights the results with the highest match of the combined search terms. Occurrence relevance, on the other hand, simply counts the number of times it sees individual words in the search term. To use to occurrence relevance, set it to **`OCCURRENCE_RELEVANCE`**
`catalogBrowseEnabled`	When clicking *Browse All Courses* from the *Find Learning* tile, this configuration enables the user to launch the library browse page rather than the library search results page. By default, the configuration is **`false`**, which launches the library search results page with a blank keyword search, and the user can filter from there. Configuration options are **`true`** or **`false`**.
`itemHoursDisplay` and `programHoursDisplay`	These properties enable and disable the display of credit hours (all types) in your libraries. If you're using hours (for example CPE hours or Credit Hours), then set to **`true`**. If you aren't using hours, set to **`false`**.
`browseCatalogBannerContents[*]`	`browseCatalogBannerContents` controls which categories appear in the scrolling banner, or carousel, at the top of the users' browsing experience. For any type of category in brackets, set the property to `true` to bring that category of courses into the carousel.
`maxInitialCategoryCards`	This controls the amount of cards that appear to users before they need to click *Show All* to show all the cards in the category. The value must be between 1 and 40. We recommend a low number so that you don't overwhelm your users on the first page.

Property	Description
`catalogSearchPrefixes`	Some customers use a standard prefix for learning items. For example, they add the learning item ID in brackets: [LRN-123]. If you use a convention like this, you want the library search to understand it as a convention so that searches for **`LRN-123`** (without the bracket) are treated as a search for **LRN-123** but also as searches with the prefix convention: **`[LRN-123`**. In `catalogSearchPrefixes`, set the prefixes that the search recognizes. You can add up to three, separated by commas. For example: `catalogSearchPrefixes=[,PRE-,(` adds the prefixes `[`, `PRE-`, and `(`. You can't use a comma as a prefix.
`keywordsToIgnore`	`keywordsToIgnore` limits clutter in multikeyword searches. For example, if you configure a keyword to ignore as `keywordsToIgnore=SAP`, then when a user types **`SAP Privacy Policy`** into a search, the search ignores **SAP** and concentrates on **Privacy Policy** as its phrase. In this case, we know that the entire library contains SAP courses, so if the search looked for SAP, it would return clutter instead of the thing that the user actually wants: a privacy policy course. **Note** `keywordsToIgnore` has little impact on single keyword searches. When only one keyword is provided (**SAP**, for example) and it matches an ignore word, the search does an **exact match** on the keyword not an **exact phrase** match. Search also has a rule that IDs are always a double wildcard match. This is a core principal of the search feature and is **not** overridden by this feature. As a practical outcome, therefore, `keywordsToIgnore` doesn't apply to IDs.
`enableBrowseLibrary`	This configuration controls the behavior of the *Browse Library* feature on the new Learning home page. When set to `true`, a dropdown is displayed with two options: *Browse by Category* and *Browse All*. Users can select a category to filter the library or browse all learning activities. When set to `false` (the default value), the dropdown is hidden and users can select *Browse Library* to browse all learning activities.

Properties that Apply to the Library Calendar

The learning calendar is a place that the end user can view available upcoming training sessions and their corresponding courses in a calendar-based view. You can set the default display settings. When the user changes the view and makes it different from the default, the user's preferences are saved.

Property	Description
`calendarPreferencesHandler` `calendarLazyPersistence`	If the `calendarLazyPersistence` property is set to true, the user's preferences aren't immediately persisted. Setting to true increases transaction speed with a large user base. The class in the `calendarPreferencesHandler` property is the class that handles users' preferences. Don't change the value in the `calendarPreferencesHandler` property.
`excludedWeekDays.*`	The `excludeWeekDays.*` properties remove days from the calendar. For example, `excludedWeekDays.Sunday=true` removes Sundays from the calendar.
`firstDayOfWeek`	The `firstDayOfWeek` property contains first day of the week, the one that appears furthest left on the monthly and weekly calendar views. See comments in the file for allowed values.

`calendarDailyTimeSlotStartTime`
`calendarDailyTimeSlotEndTime`
`calendarDailyTimeSlotSize`
	The `calendarDailyTimeSlotStartTime` and `calendarDailyTimeSlotEndTime` properties define the default time range that displays in the calendar. The `calendarDailyTimeSlotSize` property controls the increments that the calendar is grouped into.

`rememberCalendarMode`	If the `rememberCalendarMode` property is set to true, then the application persists the user's last view of the calendar (daily, weekly, or monthly). If set to false, it doesn't persist the last view.
`monthlyLearningCalendarDailyEventDisplayLimit` `monthlyCatalogCalendarDailyEventDisplayLimit`	The `monthlyCatalogCalendarDailyEventDisplayLimit` property contains the maximum number of events that can appear in the monthly library calendar view. Don't use the `monthlyLearningCalendarDailyEventDisplayLimit` property.

23.2.9 Hiding Learning Item Revision Information from Users

Hide revision information from users if you don't use the learning item revision wizard to strictly enforce revisions of learning items.

Context

SAP SuccessFactors Learning is built for strict learning item revisions. If your users are tracked by which revision of training they completed, for example, if your training is examined by a government agency, then revision information is important to your users. You make strict revisions with the learning item revision wizard.

Many companies don't revise learning items or maintain old revisions of learning items (they don't use the revision wizard). If you don't use the revision wizard, then revision information is likely to confuse your users, so you can remove it from the users' interface.

Procedure

1. Go to *System Administration* > *Application Administration* > *User Settings*.
2. Clear the *Show Revision Information* checkbox.

23.2.10 Enabling Learning Approval Waivers for Managers and HRBP Users

You can enable learning approval waivers for managers and Human Resources Business Partners (HRBP) users when you want their assignments to be implicitly approved.

Prerequisites

To use this feature, you must be using approval processes in SAP SuccessFactors Learning for learning activities. You also need to be using the default approval roles of Learning Manager 1 or HRBP.

Context

When this option is not enabled, all learning activities with an approval process require manual approval from a manager. Some organizations prefer this confirmation step, while others find the manager approval step redundant. For example, if a manager assigns a course to users and the assignment doesn't take effect until the same manager approves it, then waiving the approval step might make sense for that organization.

When this option is enabled, the system automatically approves users' approval requests for learning activities assigned by their manager, alternate manager, an administrator who serves as their manager, or an HRBP user.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *User Settings*.
2. Select *Enable Approval Waiver when Manager or HR Business Partner assigns Online Item, Instructor-Led with Online Content Item, or External Course*.
3. Choose *Apply Changes*.

23.2.11 Setting Course Defaults for Learning Completion

Set course defaults for learning completion to change how new courses behave by default when learners and their managers want to claim credit for their completed courses.

Prerequisites

You can insert an approval process between the moment that users post history records and the time that the record is included in their learning history. For example, you might want a manager to verify that the user has attended a seminar before the user gets credit in learning history. If you want to use approval processes, create an approval process before you set course defaults for learning completion.

Context

Individual courses have two process control flags: *Managers can Add to Learning History* and *User can Add to Learning History*. They control whether learners, their managers, or both can post completion for a course. Most companies have a policy about who can post completion and want to set the default value for all new courses in their system. You can globally control the default settings for these two flags.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Security* > *Role Management*.
2. Find and open each learner and manager role that you use, and then for each go to *Permissions*.
   - If you want to allow the role to post their own completion for internal learning events, add Access Add to Learning History.
   - If you want to allow the role to post their own completion for external learning events, add Access Add to Learning History for External History Records.
   - If you want to allow the role to post completion of internal learning events for direct reports, add Access Direct Report to Add History Records.
   - If you want to allow the role to post completion of external internal learning events for direct reports, add Access Direct Report to Add External History Records.
   - If you want to prevent the role from posting their completion, remove the permissions.

   Even if you disable all users from posting their completion status, you should still set the default for future courses. When, for example, you set all future courses to prevent, by default, learners from posting their own learning completion, you signal to learning administrators that users can't do it. Please be aware, however, that if you disable it at the security permission, the role can't add their own completion regardless of the setting in the course.
3. Go to *System Administration* > *Application Administration* > *User Settings* > *User Adding History Record Defaults*.

4. Decide who can post completion by default for all new courses.

Option	Description
User can add history records for items	Select this if you want all new courses to default to allowing learners to post their own completion. *User can Add to Learning History* is selected by default for all new courses.
Managers can add history records for items	Select this if you want all new courses to default to allowing managers to post completion for their direct reports. *Managers can Add to Learning History* is selected by default for all new courses.

5. Decide whether learners need an approval process to finalize their posting.

Option	Description
Require approval when users add to learning history for internal learning	When selected, if users attempt to post course completion, they must first get approval. You associate an approval process with this control.
Require approval when users add to learning history for external learning	When selected, if users attempt to post completion for external learning, they must first get approval. You associate an approval process with this control.

23.2.12 Showing Price to Users

Show price to users when you use price, hide it when you do not use price.

Context

> **Note**
>
> Hiding price does **not** turn off commerce features if you have already enabled them. If you want to disable your commerce features, please engage a partner who can help you make a final financial reconcilliation of your transactions.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit the *FINANCIAL* system configuration.
3. To show pricing to **internal** users, set `showPricingInternalUsers` to **`true`**.

   To hide pricing information - for example if you do not use commerce features for internal users - set it to **`false`**.
4. To show pricing to **external** users, set `showPricingExternalUsers` to **`true`**.

To hide pricing information - for example if you do not use commerce features for external users - set it to **`false`**.

> **Note**
>
> External users include the extended enterprise, but this setting applies to learning sites as opposed to Learning Marketplace.

5. Click *Apply Changes*.

23.2.13 Configuring Single-Word Library Search Prefixes

Configure single-word library search prefixes if you use a prefix convention for learning items.

Context

Some customers use a standard prefix for learning items. For example, they add the learning item ID in brackets: [LRN-123]. If you use a convention like this, you want the library search to understand it as a convention so that searches for **`LRN-123`** (without the bracket) are treated as a search for **LRN-123** but also as searches with the prefix convention: **`[LRN-123`**.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Open *LIBRARY*.
3. Find `catalogSearchPrefixes` and add the prefix.

   You can add up to three prefixes, separated by commas.
4. Click *Apply Changes*.

23.2.13.1 Library Search Prefix Use Case

Use library search prefix if you have standard prefixes to your courses and you want SAP SuccessFactors Learning to understand them as a standard prefix when users run library searches.

Some customers add prefixes to learning items in their libraries. For example, if a learning item were called LRN-123, those customers add some standard characters around learning item. It could be, for example, square brackets: `[LRN-123]`.

Users learn the habit of adding the character to single word searches. So instead of searching for LRN-123, they search for [LRN-123]. If administrators later strip the character conventions and call the item simply LRN-123, users won't find learning items if they continue to search with the bracket as a prefix: **`[LRN-123`**.

To make the search work with the habits of the user, you can add a prefix. When you add the prefix (for example, the bracket), the library search looks for the exact string and also looks for the string after the bracket. For example, if you add the bracket as a prefix, and if a user searches for **`[LRN-123`**, the search looks for **both** the exact string `[LRN-123` and also the string without the prefix `LRN-123`.

23.2.14 Setting Default Web Library Results View

Set the default library results view to control how users see courses in their library: as a set of cards or in a list.

Context

We recommend the library card view for most customers. With cards, users can more easily discover details about the content and they can quickly orient themselves to the content. Some customers, however, might choose to default their users to a list view in the library results. You might choose to default users to a list view if you aren't using content images to help users understand courses, if you want to show more learning items at a glance to users, or if your course descriptions are more valuable to orienting your users than the titles of your courses.

Users can override the default that you set for them. If, for example, you set the default to list view, users can choose to see the results in cards. We save the users' preferences so that the next time they log in, they see their preferred view, not the default. Furthermore, if you change the default, users who have made a selection keep their preferred view.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Open *LIBRARY*.
3. Find `catalogResultsViewMode` and set it to the value that makes sense as a default for your users.
   - `Card`: set to card view to prioritize information about the individual courses and not the list of courses found.
   - `List`: set to list view to prioritize the set of courses found and not the information in each individual result.
4. Click *Apply Changes*.

23.2.15 Controlling Managers' View of Employees in Learning

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

Procedure

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

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

4. Click *Apply Changes*.

23.2.16 Updating Learning Manager and User Tools

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

Procedure

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

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

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

23.2.17 Editing the Instructional Text on Learning Manager Dashboards

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

Context

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

Procedure

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

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

   For example, find `tab.MyInstructionalText` in the search results, and then click its edit button.
7. Choose *Locales*.
8. For each language, edit the value of the instructional text.
9. Choose *Apply Changes*.

23.2.18 Masking User IDs in SAP SuccessFactors Learning Reports and Notifications

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

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *LMS_ADMIN*.
3. Find `privacyActDefaultMask` and set it to the characters that administrators should see as the mask of the user ID.

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

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

23.2.19 Showing or Hiding the My Learning Assignments Filter

Show or hide the filter in *My Learning Assignments* to raise or lower its emphasis to users.

Context

Users can filter their assignments, but they often don't know it because they don't see the *Filter* link. You can expand the filter by default so that users notice it.

Procedure

1. Go to *System Administration* > *Configuration* > *System Configuration* > *User Learning Plan*.
2. Find `expandLearningAssignmentsFilters`.
   - To expand the filter by default for all users, set it to **`true`**.

- To collapse the filter by default for all users, set it to **`false`**.

23.2.20 User Login and New Account Panels

These settings control what the users see on login and new account panels.

You can use basic HTML formatting to render your text as you would like to see it.

This Field....	...Is Used as Follows
User Login Panel	The text you type appears in the Welcome section of the end-user login page. If you change the text in this box, it's automatically updated in the USER_LOGIN_PANEL panel in *System Administration* > *Application Administration* > *User Introductions*.
User New Account Panel	The text you type appears in the self-registration page. For the new account panel to appear to users, you must select the *Allow Users to create a new account at SuccessFactors Learning login page* checkbox (*System Administration* > *Application Administration* > *User-Created Account*) in the *User Settings* area. If you change the text in this box, it's automatically updated in the USER_NEW_ACCOUNT_PANEL panel in the *System Administration* > *Application Administration* > *User Introductions*.

Related Information

User Settings [page 917]

23.2.21 Delegate Settings Global Variables

These are the settings that are global variables for delegate users in SAP SuccessFactors Learning.

If you select either *Predefined Permissions* or *Selected Permissions*, then the user interface shows *Delegates* when a manager clicks *Options and Settings* on the home page.

> **Note**
>
> A delegate is another user who users can identify to act on the work that they need to complete in the user interface.

If you select either of these checkboxes, managers add delegates in the user interface, and then you clear the checkbox, then the system sets all of the delegated permissions for the affected users to inactive. When you reselect the checkbox, the permissions are still inactive, but the system retains the permissions that a manager granted for each delegate. If managers provided selected permissions for a user, they can restore those permissions by editing the permissions for the user and clicking *Selected Permissions*.

This Field...	...Is Used as Follows
Predefined Permissions	If you select *Predefined Permissions*, then managers can select another user to act as a delegate. When managers provide predefined permissions to another user, they provide that user with all of the permissions of the USER PROXY ROLE (*System Administration* > *Security* > *Role Management*).
Selected Permissions	If you select *Selected Permissions*, then managers can select the permissions (from the set of permissions that they currently have) that they want to grant to the user.

Related Information

Learning Global Application Settings [page 1092]

23.2.22 Rules of Learning Manager Approval Waiver

When you enable learning manager waiver, these rules are in effect.

- When a manager or Human Resources Business Partner (HRBP) assigns learning to users and that person is also an approval step, that person's approval status appears as “Waived”.
- The waived approval step can appear at any time in the process. For example, if the approval first goes to an organization owner and then to the manager as a second step, the second step is waived.
- If a step is waived and a later step rejects the request, the approval doesn't return to the manager. If the manager disagrees with the rejection, the manager must reassign the learning.
- The manager must be identified as the standard Supervisor Level 1 role or HRBP role in *References* > *System Administration* > *Approval Roles*. For example, it isn't waived if the manager also happens to be the instructor and is approving in the role of instructor. It's also not waived if the instructor is in a custom approval role.
- The person waiving the approval process must be the users' manager, alternate manager, or HRBP **at the time of the request/assignment**.
- The person waiving the approval process doesn't receive any communications about the approval, including any notification that the approval was waived.
- The approval doesn't show in the approver's dashboard.

23.2.23 General User Settings

These user settings control how users experience SAP SuccessFactors Learning. (*System Administration* > *Application Administration* > *User Settings*)

This Field...	**Is Used as Follows...**
Prevent user scheduling conflicts	If this is selected, when someone (administrator, manager, or user) attempts to register a user in a class that conflicts with another class that the user is already registered in, the system prevents the registration. If this isn't selected, when someone attempts to register a user in a class that conflicts with another class that the user is already registered in, the system warns of the conflict, but doesn't prevent the registration.
Enable User to choose the Class timezone display	If you select this checkbox, then in the end-user environment, *Always display Classes in this timezone* is enabled, meaning that users can choose to see the class times in their timezone or the timezone of the class, if they're different. If you clear it, then *Always display Classes in this timezone* is disabled. The effects of disabling the checkbox are different for new users and existing users: • New users can't change the default setting you declare *Default to User's timezone for display of Classes* checkbox. If you default the users to see classes in their own time-zone, and the *Enable User to choose the Class timezone to display* checkbox is clear, then all new users are forced to see classes in their own timezone. • Existing users maintain their setting at the time you clear the Enable user to choose the Class timezone to Display checkbox. If the users cleared their Always display Classes in this timezone checkbox, then it remains clear. If the users selected it, it remains selected. In 2018, we released Course Home, which is the next generation of learner experience with courses. Course Home ignores the *Always display Classes in this Time Zone* setting to simplify your configuration. In Course Home, SAP SuccessFactors Learning displays the time in local time, not based on the static setting in the preferences.

This Field...	**Is Used as Follows...**
Default to User's timezone for display of Classes	If you select this, then new end users have a clear *Always display Classes in this timezone* checkbox in their User Settings page. If it's clear, the users' checkbox is also clear. Existing users maintain their existing settings. In 2018, we released Course Home, which is the next generation of learner experience with courses. Course Home ignores the *Always display Classes in this Time Zone* setting to simplify your configuration. In Course Home, SAP SuccessFactors Learning displays the time in local time, not based on the static setting in the preferences.
Allow users to change Regional Information	If you select this, then users can change their personal information on their **User Settings** page.
Allow self-registration to proceed as long as the prerequisites will be completed prior to the scheduled start date	If you select this, users can self-register as long as the prerequisites for the offering's item will be completed by the user before the scheduled start date of the course.
Allow users to assess competencies of their own	If you select this, users can assess their own competencies. They can initiate self-assessments and nominate only themselves as raters in multi-rater assessments. Supervisors and administrators, however, can initiate a self-assessment process by creating an assessment process with a rater type of only self.
Allow users to initiate multi-rater assessment process for themselves	If you select this, user can initiate multi-rater assessments on their own. The *Multi-Rater Assessment* button appears in the Assessment History page of the user environment. If you clear the checkbox, the button no longer appears.
Allow users access to online content without registration	If you select this, then the default setting for all newly created items is changed to *Yes*. If you choose not to allow users access, then the default setting for all newly created items is set to *No*.
Allow Users to change currency	If you select this, users can change their currency. Clearing the checkbox disables the Currency ID list on users' User Settings page. The Currency ID is also disabled if the system has only one currency.
Enable User Item Requests	If you select this, new learning items have their *Enable User Requests* checkbox selected (on the Items).
Allow Managers to assess competencies for their employees	If you select this, then managers (or alternate managers and delegates) can initiate ad-hoc, single-rater assessments for their direct reports.

This Field...	**Is Used as Follows...**
Allow Managers to initiate a multi-rater assessment process for their employees	If you select this, then managers (or alternate managers and delegates) can initiate ad-hoc, multi-rater assessments for their direct reports.
Enable Exam Objects for iPad	If you select this, then users who download content to iPads can take exams. Otherwise, users must take their exams on-line.
Show Revision Information	If you select *Show Revision Information*, then users see the learning item revision information throughout the end user interface.
Allow Manager to remove any Alternate Manager	If you select *Allow Manager to remove any Alternate Manager*, then managers or delegates of the managers can remove alternate managers.
Enable Approval Waiver when Manager or HR Business Partner assigns Online Item, Instructor-Led with Online Content Item, or External Course	If you select this option, the system automatically approves users' approval requests for learning activities assigned by their manager, alternate manager, an administrator who serves as their manager, or an HRBP user. This bypasses the manager approval steps. An approval process must be configured and required for an online item, instructor-led with online content item, or an external course. The person assigning the learning activity must be the user's manager at the time the user requests an approval. The manager must be in the standard role of manager. If your system requires strict approval processes and you want all assignments to be approved manually, do not select this option.
Assignment Warning	These settings control assignment warning. When you select *Warn the manager for recent assignments/registrations, completions or unmet prerequisites during assignment*, the system warns administrators when they attempt to assign a course that is already assigned to the user.

This Field...	**Is Used as Follows...**
Manager can remove assignments made by an Administrator	The three selectable options for this setting are: • Items assigned by an Administrator • Curricula assigned by an Administrator • Programs assigned by an Administrator By default, no options are selected and managers can only remove the items, curricula, and programs that they've already assigned. This setting applies to all manager persona such as HR Business Partner and Alternate Manager. **Note** Managers remove the items, programs, and curricula from the respective **Course**, **Program Details**, and **Curriculum Status** pages. This setting does not apply to manager bulk actions.

Related Information

User Settings [page 917]
Learning Item Details Fields [page 148]
Assignment Warning [page 891]
Warning Supervisors of Employees Who are Already Engaged in a Course [page 888]

23.2.24 Administrator and User Shared Properties in LMS_ADMIN

This topic groups topics that describe the ways you can use LMS_ADMIN system properties to change the way both administrators and users experience SAP SuccessFactors Learning.

Property	Description
`emailValidationEnabled`	If the `emailValidationEnabled` property is set to true, SAP SuccessFactors Learning validates the syntax of addresses entered in fields where administrators or users can enter e-mail addresses (checks to find the `@` character, for example). Do not change the `emailValidationClassName` property.

Property	Description
`maxItemRatingValue`	The `maxItemRatingValue` property defines the maximum rating allowed for a learning item. If the user's library is set to display the learning item rating then the value of `maxItemRatingValue` property is the maximum number of stars an item can be given by an administrator and seen by a user.
`hideUserPhotosGlobally`	If the `hideUserPhotosGlobally` property is set to true, no user photos are displayed anywhere in SAP SuccessFactors Learning.
`proxyCaching` `nsBrowserCaching`	The `proxyCaching` property controls caching for Microsoft Edge, and the `nsBrowserCaching` controls the caching for Mozilla browsers. In a development environment, when you are updating pages often, set to false to load the pages fresh each time. In a production environment, set to true for better performance.
`cacheChartFormats`	If the `cacheChartFormats` property is set to true, SAP SuccessFactors Learning caches the XML that generates report charts (graphs). Set to true in production environments to speed delivery of charts and false in development environments when you are testing different charts.
`adHocEmailTemplateUsageEnabled`	If you are not using an OnDemand license, the `adHocEmailTemplateUsageEnabled` property has no effect. But if you are using an OnDemand license, then the property affects your ad hoc notifications. If it is set to true, then administrators can select a notification template (but not edit it) to send to users. If it is set to false, then administrators cannot select a template but can type free text into the Body box of the Ad Hoc Notifications Message page.
`showPreferenceSelectorInDefaultHeader`	If this is set to true, then users and administrators see a locale drop-down on the log in page. They can select their locale to read the login page in their language. If it is set to false, then the login page appears in the default locale language.

Property	Description
`hideRequiredLearningSectionOnLearningPortal`	This property applies to the new Learning experience to show or hide the *Required Learning* section. This property applies to specific organizations and user groups where the section is set to be hidden. • The default value is set to false. If the property is set to **`false`**, the *Required Learning* section appears at the top of new Learning home page. • If the property is set to **`true`**, users can view the *Important Learning* section at the top of the page, while the *Required Learning* section is hidden from them.
`honorApprovalsForPrograms`	The default value for this property is **`false`**. When set to **`true`**, the system enforces approval requirements for online courses and classes in open-ended and duration-based programs whenever a learner attempts to register for or launch a course within a program. Learners who require approval are blocked from registration or online access until the necessary approvals have been granted. This applies to all programs, whether assigned or self-enrolled. Note that because learners are automatically enrolled in scheduled classes, schedule-based programs do not support class-level approvals.
`honorPrerequisitesForPrograms`	The default value for this property is **`false`**. When set to **`true`**, the system enforces prerequisite requirements for any course that is part of a program whenever a learner attempts to register for or launch that course. Learners who have unmet prerequisites are prevented from registering for or starting the course and must complete the unmet prerequisite requirements before they can progress through the program. This applies to all programs, whether assigned or self-enrolled.

23.2.25 User Settings

SAP SuccessFactors Learning offers global configuration for how users experience the application.

You can manage how users experience the application with the users settings in *System Administration* > *Application Administration* > *User Settings*. The settings are global to your company. Users' experience is also controlled elsewhere in the system. For example, the LMS_ADMIN system property file and users' security roles also control how users interact with SAP SuccessFactors Learning.

Related Information

Hiding Learning Item Revision Information from Users [page 900]

Allowing Managers to Remove Alternate Managers [page 887]
Enabling Learning Approval Waivers for Managers and HRBP Users [page 901]
Warning Supervisors of Employees Who are Already Engaged in a Course [page 888]
Controlling When Learners are Notified of Changes to their Learning Assignments [page 1097]
General User Settings [page 912]
Setting Course Defaults for Learning Completion [page 902]
User Login and New Account Panels [page 910]
Rules of Learning Manager Approval Waiver [page 911]

23.2.26 End User Interface Interaction Preferences in LMS_ADMIN

Interaction preferences in LMS_ADMIN change learners' experience in the web.

End Users were called students in previous versions of the application, so you see that terminology in the LMS_ADMIN file. See the comments in LMS_ADMIN to understand how to set the preferences.

23.2.26.1 Deprecated Home Page Properties in LMS_ADMIN

These properties still appear in the LMS_ADIMIN system properties file but are deprecated.

The Home Page is the predecessor to the Easy Links and the work areas under them, next to the Learning To-Do list (which was removed for the current My Learning Assignments tile). Until we are sure that removing learning plan settings will not affect your installation and any customizations you might have, we have left the settings in place. As a rule, however, you should not use them:

- `showHomeCatalogModule`
- `showHomeAlertsModule`
- `showHomeLearningPlanModule`
- `showHomeCareerPlanModule`
- `showHomeCurriculumModule`
- `showHomeNewItemModule`
- `showHomeFeaturedItemModule`
- `showHomeRevisedItemModule`
- `homeLearningPlanModuleRecordsToDisplay`
- `homeCareerPlanModuleRecordsToDisplay`
- `homeCurriculumModuleRecordsToDisplay`
- `homeFlaggedCatalogItemsToDisplay`
- `searchNewPostsToCommunitiesInTheLastDays`

23.2.26.2 Learning Display Properties in LMS_ADMIN

These properties control the list of assignments that a user has.

In different iterations of SAP SuccessFactors Learning, the list of assignments has been called "learning plan," "to-do list" and "my assignments." You see some of that language in this section, which can cause some confusion. Generally speaking, these different phrases referred to the list of a user's learning assignments.

Property	Description
`showDaysRemaining`	Set to true to show the Days Remaining Column rather than the Required by column in the Learning Plan Page and the Curriculum Details page. Default: false
`showAssignmentType`	Set to true to show the Assignment Type Column in the Learning Plan Page, the Curriculum Details page, and in the Home page. Default: false.
`learningPlanFieldsChooserItems.*`	`learningPlanFieldsChooserItems` controls the columns that users can enable and disable on the learning plan and some properties of the column. The settings have attributes that identify the column, control the user interaction, call the column title, and control the width. Each field has the following sub properties: • `.enabled`: Set to true to allow a user to choose the field. • `.columnID`: This contains the id of the column. Don't change. • `.titleLabelID`: This is the label (from the I18N settings in the admin environment) that appears at the top of the column. • `.visibility`: This is whether the column appears by default, whether it's mandatory, or whether it is optional. Possible values: default, mandatory, and optional. • `.width`: This is the width of the column.
`learningPlanSystemPreferences.groupPlanFilter`	This property defines the system default user learning plan settings. User can override with their own preferences. This defaults the Group By drop-down. Possible values: None, ItemType, AssignmentType, DueWithin, StatusTowardCompletion. Default: None
`learningPlanSystemPreferences.itemsFilter`	This property sets the default of the *Filter By* list. Possible values: All, With Online Content, Registered, In progress. Default: All
`learningPlanSystemPreferences.requiredByFilter`	This property sets the default of the *Required By* list. Possible values: All, Next 30 Days, Next 60 Days, Next 90 Days. Default: All

Property	Description
`enableOnlineContentEarlyLaunchWarning` `onlineContentEarlyLaunchWarningThreshold`	When `enableOnlineContentEarlyLaunchWarning` is set to true, users are warned if they launch online content that is due far in the future. For example, if a user launches online content that is due two months from now, the early launch warning tells them that their course isn't due soon. You control the threshold for the warning in `onlineContentEarlyLaunchWarningThreshold`, which sets a threshold some number of days in the future. If the due date of the online item is later than the threshold, the user sees the launch warning.
`showItemThumbnailPhotosGlobally`	When set to true, administrators can type a URL in the *Thumbnail URL* box to show an image or logo in the description of courses in users' catalogs. When set to false, the item thumbnail functionality is disabled globally.
`showSystemDefaultThumbnail`	When set to true, the default thumbnail image or icon appears to users.

23.2.26.3 Miscellaneous User Interface Properties in LMS_ADMIN

These properties are miscellaneous user interface properties in LMS_ADMIN system properties file.

Property	Description
`showCompetencyType`	If the `showCompetencyType` property is set to true, users see their competencies' type when they're displayed. A competency type is a category of competency, such as skill or knowledge. When set to false, the competency type doesn't display to the end user.
`showAllCoursesByDefault`	The `showAllCoursesByDefault`property is used for controlling whether on the competency search screen, users by default see all courses that they have access to that are tied to the specified competencies, or just the courses that match or exceed their current competency rating. When set to **`false`**, users first see only the courses that match or exceed their current competency rating. *View only items that help me close competency gaps* is enabled by default on the competency search screen. When set to **`true`**, users first see all courses that they have access to that are tied to the specified competencies. *View only items that help me close competency gaps* is disabled by default on the competency search screen.

Property	Description
`studentUIPreferencesHandler`	The `studentUIPreferencesHandler` property contains the class that persists end-user preferences to the database. We recommend that you don't change the value.
`displayNewsPageOnLogin`	The `displayNewsPageOnLogin` property controls the behavior of the news page. The news page appears when users first open their learning environment. You can use the news page, for example, to announce new features that you have made available or to tell users that the system will be down for maintenance in the near future. For more information, please see User Introductions [page 1275]. By default, it's set to UserDiscretion. The following are possible values: • **`Never`**: News page never displays • **`Always`**: News page always displays • **`UserDiscretion`**: The user can click a box that turns off the news page **Note** The values are case-sensitive and as written above. For example, the correct value is **`UserDiscretion`**not **`userdiscretion`**.

Property	Description
`enableItemRecommendations`	When you set `enableItemRecommendations` to true, you enable a feature called "Item Recommendations." This feature allows you to recommend learning items to members of an assignment profile. After you set this value to true, you can add one or more items to the *Recommended Items* tab of an assignment profile when you want to recommend those items to the users in the assignment profile. Users see the recommended learning items in their library or on their SAP SuccessFactors Learning *Home* tab. An item appears in the user's library or on the user's home page if the item is: • In a library that is assigned to the user. • Not already on the user's To-do list. • Not in the user's learning history (completed work). If a user dismisses an administrator-recommended item, then that item doesn't appear on the user's home page as a recommended item, even if an administrator adds it as a recommended item to a different assignment profile that the user is included in. Users see a *Recommended for you* section in the *Find Learning* tile and in the library search.
`enableNotificationHeaderFooter`	This property is used to enable/disable the notification header and footer support.

`allowUserToModifyCustomColumnsDataIfRegisteredBySuper`
 	
`allowUserToModifyCustomColumnsDataIfRegisteredByAdmin`
	These properties, when set to true, allow users to modify custom column data entered by an administrator or a manager.

`enableFontIcons`	Set to **`false`** to use bitmap icons. We recommend that you set it to **`true`** to use font icons, which scale better for differently sized displays.
`enableSmartLinks`	Set to **`false`** to require users to log in when they receive a deep link.
`UsersCanSubmitIncompleteOptionalSurveys`	Set to **`true`** to allow users to submit incomplete surveys when the survey is optional.
`manageLearningToolEnabled`	Set to **`true`** to enable the Bulk Learning Editor. By default, `manageLearningToolEnabled` is set to **`false`**.

Property	Description
`updatedSelfRecordLearningFlow`	Set to **`true`** to give all end users (managers and learners) the same experience when they post learning (for their direct reports or themselves). We recommend a setting of `true`, but the default is `false` to maintain existing behavior. Existing behavior is that managers have an upgraded experience when posting learning but their direct reports don't.
`hideViewedP2PRecommendations`	Set to **`true`** to make peer to peer recommendations consistent with administrator recommendations: after users view the recommendation (it is in their history, for example), it's hidden from the recommendations tile.
`overrideContentLaunchInNewWindow`	Set to **`true`** to override the content-object level launch method and launch content inline. All content that doesn't use a launch method of *Browser* launches inline. By default, it's set to **`false`**, using the launch method defined for the content object.
`displayAdditionalDetailsForLearningCards`	The property allows learners to access additional details of learning activities, including courses, programs, classes, and curriculum requirements, directly on the new Learning home page without navigating to the details page. The default is set to **`true`**. To disable the display of additional details for learning cards and redirect users directly to the Course Home page, set the property to **`false`**.
`enableESignatureResetPIN`	The property allows learners to securely reset their e-signature PIN from the new Learning home page. The default is set to true, where learners can access the *Forgot My PIN* option on the *Options and Settings* page. **Note** On choosing *Forgot My PIN*, a secure PIN reset link is sent to the learner's registered email address, allowing them to create a new PIN.
`enableLegacyUIReplacement`	The property allows learners can access the redesigned interface to view program details, curriculum details, and curricula status from the Learning home page. Set it to **`true`** for learners to access the redesigned pages. The default is set to **`false`** where learners access the legacy program and curricula pages.

Property	Description
`hardenedContentInteractions`	The property prevents learners from certain browser interactions when they access learning content in the content player. When set to **`true`**, learners can't access the browser context menu when they right-click within the same-domain content frame in the content player. Keyboard shortcuts for opening browser developer tools are also disabled while learners interact with the content. By default, learners can access the browser interactions in the content player.

23.2.26.4 Organization-Based Email Notification Header and Footer

You can create custom headers and footers for individual organizations' email notifications. When you do, you must be] aware of these rules.

You can create customer headers and footers for email notifications that go to users and supervisors (other email notifications aren't affected). You create the header and footer in *People* > *Organizations* > *Summary* inside the *Email Notification Header* and *Email Notification Footer* text areas. If the text areas are empty, the system ignores them.

Organizations are hierarchical, so the header and footer that users see could come from the users' parent organizations. When sending an email notification, the system starts looking for headers and footers at the users' lowest organization and then works up the hierarchy until it finds a custom header and footer. When it finds **either** a header or footer, it stops looking and uses the header and footer at the current organization level, even if one is populated and the other is blank (for example if the header is populated with text and the footer is blank, the system stops going up the hierarchy, and sends the blank footer).

To enable custom headers and footers, go to *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN* and set `enableNotificationHeaderFooter` to true. When setting up customer headers and footers for organizations, remember:

- As with any email notification system that sends bulk email, test your email notifications before sending email to your users.
- If you don't see the header and footer that you expect, you likely have a header or footer configured on a child organization.
- The header and footer accept HTML. Be strict with your HTML usage: wrap your paragraphs in paragraph ( ) tags. If you don't include a tag to separate your header and footer from the body of the message, it doesn't separate from the body of the message.
- The system is designed for organizations to have a custom header **and** a custom footer on the same organization level.

Related Information

Miscellaneous User Interface Properties in LMS_ADMIN [page 920]

23.2.26.5 Online Content Window Control Properties

When users launch online content in the same browser window as SAP SuccessFactors Learning, these properties control the size of the IFrame that contains the content.

IFrame Content Sizing

This Property...	...is Used as Follows
`inlineContentWindowSize.aicc.width` `inlineContentWindowSize.aicc.height`	These properties control the height and width of the content IFrame when the launch type is AICC.
`inlineContentWindowSize.scorm.width` `inlineContentWindowSize.scorm.height`	These properties control the height and width of the content IFrame when the launch type is SCORM.
`inlineContentWindowSize.browser.width` `inlineContentWindowSize.browser.height`	These properties control the height and width of the content IFrame when the launch type is browser.

23.2.27 Warning Users Before They Navigate to an External Website

When users select a link for an external website, you can warn them that they're navigating outside the application. You can also create an allowlist of individual websites and domains that are excluded from this warning.

The display of the warning is a combination of configuration and content launch method. There are 3 configuration settings located in *System Administration* > *Configuration* > *System Configuration* > *WEB_SECURITY*.

The feature is disabled by default. To enable it, set `enableInterstitialForExternalURL=true`.

To add individual websites to the allowlist, you create an entry for each one. The format is `whitelistExternalURL[0]=<URL>`. Use `[0]` when defining the first website and increment the value for each additional website.

Sample Code

```
whitelistExternalURL[0]=http://xyz.plateau.com:9090
whitelistExternalURL[1]=http://abc.plateau.com:8080
```

To add domains to the allowlist, you create an entry for each one. The format is `whitelistedDomains[0]=<URL>`. Use `[0]` when defining the first domain and increment the value for each additional domain.

Sample Code

```
whitelistedDomains[0]=successfactors.com
whitelistedDomains[1]=plateau.com
```

These are the possible scenarios:

- `enableInterstitialForExternalURL=true` and the launch method of the content isn't structured (ex.: AICC with wrapper, Browser or Document Type), the warning would be displayed.
- `enableInterstitialForExternalURL=true` and the launch method of the content is structured (ex.: AICC without wrapper, SCORM 1.2, SCORM 2004 or SCORM 2004 4Ed.), the warning wouldn't be displayed.

Related Information

Content Object Launch Methods [page 667]

23.2.28 USER LEARNING PLAN

This topic describes how you can use the properties in the USER LEARNING PLAN system properties file.

Property	Description
`timeline.buckets.*.id`	The `id` property identifies one value in the to-do list filter. End users pick a value to filter their list by due date of the object in the list. The ID must be unique.
`timeline.buckets.*.label`	The `label` property must point to an existing label. The label appears to the user on the filter list. You can add a label using the Label Import/Export Wizard.
`timeline.buckets.*.days`	The `days` property contains the due within days. List items due within the amount of days specified appear when the user filters by the bucket. For example, if the value is 30, then when the user selects the bucket, then items due within 30 days appear on the to-do list. To specify overdue items, set the days property to 0 (zero).
`todoFields[*].visible`	For each type of field in *Learning Assignments*, you can control whether it is visible to users or not.
`learningPlanQualItemsAndRequirementsDisplayThreshold`	The threshold is in days and the system will only display qual Items and qual Requirements on *My Assignments* with Required Dates that are inside the threshold and (items should have been completed at least once so that their retraining interval settings kick in).

Property	Description
`expandLearningAssignmentsFilters`	If set to **`true`**, then the filters appear expanded in the *My Assignments* tile by default. If set to **`false`**, then the filters appear collapsed by default.
`learningPlanRequiredItemsDisplayThreshold`	The threshold is in days and the system will only display Items with Required Dates that are within the threshold. Items with required dates that are beyond the threshold period will now be hidden on the learner's side. Enter a value for the threshold in between 90 and 10000. **Note** Free-floating required items without a due date remain visible for learners when this property is set. For example, If the threshold value is set to 90 then the user will only be able to see items with a required date from now to the next 90 days, items that have a required date set to a value beyond 90 days from current date will not be displayed during this time.

23.3 Learning Registration, Learning Activity, and Completion Behaviors

You can change how Learning behaves during learning needs management when it registers learners for courses, for example, or when learners complete their courses.

As a system administrator, you can change how Learning behaves, by default, when learners register for and complete courses, when administrators create courses for your organization, and how the enrollment process works. You typically configure this information during implementation and then revisit it.

23.3.1 Enabling Waitlists

Enable waitlists so that when seats become available in a course, you have a list of other learners who can fill the seats.

Context

A waitlist is a list of learners who could not enroll in a course because the course reached its limit of learners. For example, if a course can only accommodate ten learners, the eleventh learner to enroll can go on the waitlist. If a

seat opens up in a course, you can fill it from the waitlist. For example, if a learner withdraws, you have an open seat in the course and you can fill it from the learners on the waitlist.

Procedure

1. Go to Learning Administration, and then go to *Learning Activities* > *Items*.
2. Find and open the course that you want to edit to enable its waitlist.
3. Set *User Can Waitlist* to *Yes*.

   Set *User Can Waitlist* at the course level because you usually want all classes based on the course to behave consistently. You want all individual classes to have a waitlist if the course allows it.
4. Decide whether you want the enrollment list to autofill from the waitlist or if you want learning administrators to control how users on the waitlist are enrolled.
   - Set *Auto Enroll from Waitlist* to *Yes* if you want to automatically fill people from the waitlist when a seat opens up in the course.
   - Set *Auto Enroll from Waitlist* to *No* if you want to manually control how seats are filled from the waitlist when people withdraw from courses.

Next Steps

If you have a class that should **not** inherit default waitlist properties from the course level (which inherits from the system level) and you want individual classes to behave differently, you can set this on the class level.

23.3.2 Enabling Class Requests as Default

Enable class requests as the default for all new courses to allow users to tell learning administrators that they want a class scheduled for a course.

Context

You can allow users to request a scheduled class. Users request the class by clicking a *Request Schedule* button on the course page or SAP SuccessFactors Learning can create a request on behalf of users who were left on the waitlist when a class of the same course begins.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *User Settings*.
2. Select *Enable User Item Requests*.

   When you select this, you set the **default** value for every new class. When you select *Enable User Item Requests* in *User Settings*, every new course that you create in *Learning Activities* > *Items* has class requests enabled.

   > ⓘ Note
   >
   > The opposite is also true: if you clear *System Administration* > *Application Administration* > *User Settings* > *Enable User Item Requests*, all new courses have class requests disabled by default.

Next Steps

Class requests depend on a set of automatic processes that find and process requests. Set them up to finish enabling class requests:

- Class Request Demand Met Email Notification
- Move Users from Waitlist to Request List
- Purge Class Requests

After you enable the default settings, you can override the default at the course level and, for courses that have class requests, you set a minimum enrollment and a contact person. Your next steps with the course settings depend on whether you enabled class requests during initial implementation or after initial implementation:

- If you enable class requests during initial implementation, new courses are enabled by default. Add minimum enrollment and a contact person who should receive requests when the requests are equal to or greater than the minimum enrollment. You can set the minimum enrollment and contact when you load the courses in the Item Connector.
- If you enable class requests after initial implementation (after you have loaded courses for the first time), find learning items that you want to enable for class requests and select *User can Request a Class*. Also set the minimum enrollment and contact person.

23.3.2.1 Scheduling the Class Request Demand Met Email Notification Process

Schedule the Class Request Demand Met Email Notification process to send email notifications when enough learners request a class so you know you need to create the class.

Context

On each class, you can configure whether users can request a class and you set the minimum number of requests. If enough users request a class, the Class Request Demand Met Email Notification process sends an email notification. This email lets you know that there's sufficient demand and you can add the class to the calendar. The automatic process sends 2 emails and uses the **ApmComponentRequest** and the **ApmUserRequestedSONotification** templates.

Procedure

1. Go to *Learning Administration* > *System Administration* > *Automatic Processes* > *Class Request Demand Met Email Notification*.
2. In *Schedule*, set the period that the automatic process runs to send the reminder.
3. In *Email Address*, type the address of the learning administrator who is responsible for receiving the requests and scheduling the class.
4. In *Reminder period*, set the number of days that the system should wait before resending a reminder.

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

Next Steps

Go to *System Administration* > *Automatic Processes* > *Purge Class Requests* to set up the process that purges old requests.

Go to *System Administration* > *Automatic Processes* > *Move Users from Waitlist to Request List* to automatically enter requests for users who were left on a waitlist after a course begins.

Related Information

Scheduling Learning Automatic Processes [page 1245]

Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]
Scheduling the Purge Class Requests Process [page 931]
Scheduling the Move Users from Waitlist to Request List Process [page 932]

23.3.2.2 Scheduling the Purge Class Requests Process

If you enable it, learners can request a class for a course that they need. The Purge Class Request cleans up old requests.

Prerequisites

Go to ▶ *System Administration* > *Automatic Processes* > *Class Request Demand Met Email Notification* ▪ to set up the process that fulfills requests. If you don't set up the process that fulfills requests, the requests age past the threshold and are purged by this process before they can be fulfilled.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to ▶ *System Administration* > *Automatic Processes* > *Purge Class Requests* ▪.
2. In *Schedule*, set the period that the automatic process runs to send the reminder.
3. In *Threshold*, type the age limit, in days, for requests.

   If you type **365** in *Threshold*, Learning purges all requests that were made more than 365 days ago.
4. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]
Scheduling the Class Request Demand Met Email Notification Process [page 930]
Scheduling the Move Users from Waitlist to Request List Process [page 932]

23.3.2.3 Scheduling the Move Users from Waitlist to Request List Process

Schedule the Move Users from Waitlist to Request List process to take learners who were left on the waitlist after a course and automatically create a class request on their behalf.

Prerequisites

Before you schedule the Move Users from Waitlist to Request List process, schedule the Class Request Demand Met Email Notification process and the Purge Class Requests process.

Context

If users are left on a waitlist after a class begins and they weren't able to attend, they likely want the course. This process automatically enters a class request for the users. Although the process isn't required for course requests, it does give you a better sense of who wants a course. It finds all classes that have started (that have a start date of the first segment in the past) and that have users still on the waitlist. It creates requests on behalf of the users on the waitlist.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Move Users from Waitlist to Request List*.
2. In *Schedule*, set the frequency and time for the automatic process to run.
3. Choose *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]
Scheduling the Purge Class Requests Process [page 931]
Scheduling the Class Request Demand Met Email Notification Process [page 930]

23.3.2.4 Adding Standard Reasons Why Users Request Schedules of a Learning Item

Add default reasons why users request a learning item so that when administrators enter a request, they can select the reason for the request from a list.

Context

Although administrators can type their own request reason, you might want to give them a list of standard request reasons: reasons that users need a scheduled offering of a learning item (course).

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that you want to change.
3. Click *Request Reasons*.
4. In *Request Reason ID*, type a unique ID.
5. In *Description*, type what the administrator should see in the list of request reasons.

   For example, if you type **`Needed for Certification`**, then administrators who are adding user requests see *Needed for Certification* in the request reason list.
6. Click *Add*.
7. Repeat the process for additional standard request reasons.

23.3.3 Customizing Certificates of Completion

Customize certificates of completion when you want to brand your certificates of completion.

Prerequisites

To create custom certificates of completion, you need to know basic Cascading Style Sheet (CSS) syntax, and you need to know some basic HyperText Markup Language (HTML).

You can add images to your certificate. Before you start, edit your image for the template. For example, size it appropriately for print, adjust the colors, and so on.

Context

SAP SuccessFactors Learning ships with default certificates of completion. But many customers want to create their own certificates of completion to add their own logo, their own signature line, and so on.

Procedure

1. Go to *System Administration* > *Configuration* > *Certificate of Completion Templates* and click *Add New*.

   If you already created a certificate of completion and you want to modify it, search for it and open it.
2. In *Add New Certificate Template*, add the following and then click *Add*.

Field	Description
Template ID	This is the unique ID of the template. Users do not see it.
Description	Use the description field to describe the certificate for other administrators.
Default Locale	This is the locale that SAP SuccessFactors Learning falls back to if it cannot find a copy of the certificate template in the users' locales.
Category	This field describes what users complete when they see this certificate. In other words, what are users completing?
Orientation	Select the orientation for your certificate. Most certificates are landscape.

> **Note**
>
> The following fields are also available as tokens for customers to customize or create a *Certification of Completion* template for *Item* and *Program* report categories:
>
> For the *Item Certificate of Completion* report category:
>
> *Class*:
> - Start Date (no time)
> - Start Date (similar to completion date, different tags for with or without time)
> - Class ID (Offering ID)
>
> *Item*:
> - Item ID
> - Item Type Description
> - Item Type ID
> - Item Revision Date
>
> *User*:
> - User ID
> - Job Location Description

- Job Location ID

For the *Program Certificate of Completion* report category.

Program:

- Program ID

User:

- User ID
- Job Location Description
- Job Location ID

3. Upload any images that you want to use by clicking *Add Image*.

   We recommend that you add your logo and maybe one more image - like the logo of your corporate training group.
4. To add the image to the certificate, type `<img src=""/>`, place your cursor between the double quotes, and then click the image in *Images* area.

   To remove the image, find its tag in the HTML and delete it. For example, if you added an image with the tag `<SF_LEARNING_ICON_SAP_PORTAL/>` delete that text to delete the relative link to the image.
5. To add dynamic data to the certificate, place your cursor in the HTML body where you want the data to go, and then click the data in *Syntax Tags*.

   To delete the data, find the syntax tag in the HMTL and delete it. For example, if you add users' first name to the certificate so that each individual user's first name appears when he or she prints the certificate, you add `<USER_FIRST_NAME/>`. To remove the user's first name, delete text `<USER_FIRST_NAME/>`.

> **Note**
>
> If you want to add a users' display name to the certificate when *General Display Name* is enabled, ensure to add `<USER_DISPLAY_NAME/>`.
>
> If learing history is recorded after *General Display Name* is enabled and the instructors' related user has their general display name populated, then the `<INSTRUCTOR_NAME/>` tag will display the general display name of the instructor. If not, the fully formatted name of the instructor will be displayed on the certificate.

6. Add HTML and CSS around the images and dynamic data to control the formatting.

   If you are not an expert with HTML and CSS, we recommend that you leave the default HTML and CSS in the certificate and edit only the text, syntax tags, and images.
7. To test the certificate template, click *Preview*.
8. To save the certificate template, click *Save*.
9. To reset the certificate template to the default version, click *Reset*.

Related Information

Translating Certificate Templates [page 936]

23.3.3.1 Translating Certificate Templates

Translate certificate templates so that users can see their certificate in their own languages.

Prerequisites

To translate certificate templates, you must have at least one customized template in the default locale. You don't need to translate the default templates. Customizing Certificates of Completion [page 933]

You can translate into locales (languages) that you've installed in SAP SuccessFactors Learning. If you need additional languages, please contact Customer Success.

Procedure

1. Go to *System Administration* > *Configuration* > *Certificate of Completion Templates*.
2. Search for and open the template that you want to translate.
3. In the *Locale* list, select the language that you want to translate out of.

   You don't always want to translate out of the default locale. For example, if you already have already translated the certificate from a primary locale of English into Spanish, you might want to send the Spanish version to be translated into the Mexican Spanish locale.
4. Copy the HTML and paste it into a text editor like Notepad.
5. Save the text file and send it to a translator.

   Most translators know this, but they shouldn't change the HTML or CSS. They might not know about SAP SuccessFactors Learning Syntax Tags. Tell them to ignore text in brackets (< and >). For example, tell your translator not translate `<USER_FIRST_NAME/>`.
6. When the translator returns the file to you, go to *System Admin* > *Configuration* > *Certificate Templates*, find, and then open the certificate template.
7. In the *Locale* list, select the locale that your translator translated.
8. Paste the HTML that your translator sent back over the existing HTML.
9. Preview and save the certificate.

23.3.3.2 Associating Certificates of Completion with Learning Events

Associate certificates of completion with learning events so that users see the correct certificate when they complete training.

Prerequisites

If your company has users who speak different languages, we recommend that you translate your certificate of completion.

Read and understand the certificate inheritance. Certificate of Completion Inheritance [page 937]

Procedure

1. Go to *System Administration* > *Configuration* > *Global Application Settings* > *General Settings*.
2. Set the system-wide default for courses' certificates in *Default Certificate Template for Items* and the system-wide default for programs' certificates in *Default Certificate Template for Programs*.
3. To change the certificate for any one individual program, go to *Learning Activities* > *Programs* and change the value of *Certificate Template*.
4. To change the certificate for any one individual course, go to *Learning Activities* > *Items*, find the course, and then change the value of *Certificate Template*.
5. To change the certificate for any one individual instance of a course, go to *Learning Activities* > *Classes*, find the instance course, and then change the value of *Certificate Template*

Related Information

Customizing Certificates of Completion [page 933]
Translating Certificate Templates [page 936]
General Global Application Settings [page 1088]

23.3.3.3 Certificate of Completion Inheritance

Certificates of completions are attached to learning events and fall back to a default if none can be found.

To set up certificates of completion, you need to understand how SAP SuccessFactors Learning decides which certificate to show to users. More importantly, you should understand the system of inheritance that it uses.

Inheritance for Individual Courses

If an individual course is scheduled for a set date and time, it's called a class in SAP SuccessFactors Learning. You edit the classes in *Learning Activities* > *Classes*. You can add a unique certificate template for each class in its *Certificate Template* field. The class inherits its default value in *Certificate Template* from its learning item.

The default value for the learning item's certificate is set in *System Administration* > *Configuration* > *Global Application Settings* > *General Settings*. You set the system-wide default for courses' certificates in *Default Certificate Template for Items*. When you create learning items, they inherit the system-wide certificate.

Inheritance for Programs

A learning program is a group of learning items, classes, and external learning. Users can receive a certificate of completion for individual learning items or classes and they can receive certificates of completion for entire programs.

Each individual program can have its own certificate of completion. Go to *Learning Activities* > *Programs* and edit the template in the *Settings* section, in *Certificate Template*.

When you create new programs, the value for *Certificate Template* is inherited from the value you set in your global application settings. Go to *System Administration* > *Configuration* > *Global Application Settings* > *General Settings*. You set the system-wide default for programs' certificates in *Default Certificate Template for Programs*.

Related Information

Associating Certificates of Completion with Learning Events [page 937]

23.3.3.4 PDF Certificate of Completion Notes

When creating PDF certificates of completion using the certificate editor, be aware of these notes.

- In Q4 2015, users received an e-mail with a deep link to the certificate, which meant that they had to log in to see their certificates. In Q1 2016 with the support of PDF, users can open a PDF certificate of completion as an attachment in their e-mail messages.
- The file name is always CertificateOfCompletion.pdf.
- The page is size A4 in landscape perspective:
  - If you use a background image, scale it to a width of 595 pixels and a height of 842 pixels and use a scale in the X-Y dimensions instead of a no-repeat property.
  - If you use a content wrapper div, scale its width, height, and margin to A4 landscape.
- We recommend that you tune and refine the HTML content at the same time as the PDF content because the scaling factor of the PDF generator is different from Web browsers.

- We generate the PDF with PD4ML. The PD4ML version in use is 3.9.2.
  - Refer to http://pd4ml.com/html.htm for the list of HTML tags supported by PD4ML
  - Refer to http://pd4ml.com/css.htm for the list of CSS attributes supported by PD4ML

23.3.3.5 SAP SuccessFactors Learning Certificate of Completion

In SAP SuccessFactors Learning, a certificate of completion is a printable certificate that shows that users completed a training course.

Certificates of completion are users' evidence that they have successfully completed a course. SAP SuccessFactors Learning administrators can customize certificates and then attach them to learning items. When users complete the learning items, they receive the certificate attached to the learning item.

Related Information

Customizing Certificates of Completion [page 933]
Associating Certificates of Completion with Learning Events [page 937]
Certificate of Completion Inheritance [page 937]

23.3.4 Administration Approvals in Learning

Approval processes are usually set up during implementation, but you often adjust approval processes or troubleshoot them during normal operation.

During implementation, you set up approval processes, but you often change them later. You usually have a few people on your Learning team who manage system administration: tasks like adjusting security roles, maintaining background jobs, and updating approval processes. Some customers use partners to manage their system administration tasks. These system administrators:

- Add new approval processes to Learning when business needs change. For example, if you add commerce features to Learning, you might add a withdraw approval process.
- Change the approval steps when your business needs change. For example, you might institute a new policy that a secondary manager must approve enrollment. You can add an approval step.
- Verify that the automatic processes for the jobs are running properly.

A larger set of Learning administrators troubleshoot and unblock approval processes or in some cases act as an approver.

- Learning administrators troubleshoot blocked approval processes. The most common cause of a blocked approval process is that an approver is on leave, so you can approve on behalf of another person.
- Learning administrators often add or remove approval processes from courses and classes. You can also break the inheritance of an approval process. Most classes based on a course, for example, might require an approval process, but as an exception, individual classes might not need the approval process.

- Learning administrators are sometimes approvers themselves. It commonly occurs when you implemented approval processes for account self-registration: as an administrator, you grant access to your system for the extended enterprise. But it could be any approval process.
- If you are using the commerce features of Learning, you typically appoint a role to approve financial transactions.

23.3.4.1 Approval Processes in Learning

SAP SuccessFactors Learning approval processes provide a structured way to manage and approve requests for learning changes.

SAP SuccessFactors Learning approval processes route an approval through a series of approval roles, which define a type of person who can grant approval. For example, you can create a role called Human Resources Business Partner (HRBP) and assign users to the role. In an approval process, the HRBP role can be a step in the approval process.

> ⓘ Note
>
> If the HRBP and the Manager roles are the same user, and approval is required by both roles, the user will have to approve the request once for each role.

Enrollment Processes

Most customers use Learning approval processes to control enrollment. For example, you can say that for learners to enroll into a given course, they must get their managers' approval. In fact, manager approval is the most common approval process. After learners get their manager approval, they can enroll into the course.

Withdraw Process

Some customers use approval processes to control withdraw from courses. Withdraw processes are popular with customers who track finance in Learning because these customers want to verify that learners avoid financial penalties for withdrawing before a course begins. For example, if a course has a 50% penalty for withdrawing within 24 hours of its start, managers want to know why the learner can't attend.

History Record Approval

Some customers allow learners and managers to post their completion of courses to Learning (as opposed to requiring learning administrators to verify and post completion). When you allow learners and managers to post completion, set up an approval process so that you have a second person verify that the learner completed the course. You can for example, require a manager approval or approval from someone in the organization. The

learner shows the approver a certificate of completion (for example) and the approver can verify that the learner completed the course.

> **Note**
>
> Some customers add e-signatures to history record approval. E-signatures are a secondary form of identity verification often required by oversight bodies. If you have oversight, chances are that you want to add e-signatures.

Account Self-Registration Process

Some customers allow people in their extended enterprise to create a Learning-only user account. It allows them to offer Learning content to business partners and customers who are outside their internal workforce. An approval process can be configured to verify that the request is coming from a valid member of their extended enterprise. It requires a review of each person requesting an account.

SF-182 Approval Processes

U.S. Federal customers use Standard Form 182 (SF-182) to request external training: training outside their organizations. If you aren't a U.S. Federal customer, you don't use the SF-182 process.

Financial Transaction

Some customers use finance features of Learning to track training costs, prices, or both. If you implement finance features, you have a special approval process for financial transactions. Unlike the other processes, you don't configure an approver process or approval roles for financial transactions. Instead, you set up a security role with permission to approve the financial transactions and that role simply approves or denies the transaction.

Related Information

Learning Approval Process Global Application Settings [page 946]

23.3.4.2 Creating Approval Processes

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

Prerequisites

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

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

Context

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

Procedure

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

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

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

Next Steps

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

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

Related Information

Learning Approval Process Global Application Settings [page 946]
Advice for Creating Approval Processes for Self-Registration [page 984]
Creating Custom Approval Roles [page 943]
Setting an Approval Process for Withdrawing from Courses [page 951]
Setting an Approval Process for Enrolling into a Course [page 951]

23.3.4.2.1 Creating Custom Approval Roles

Create custom approval roles if you can't use the default approval role.

Prerequisites

Create a domain or organization structure that matches your company, including the hierarchy of organizations or domains. Assign users into the organizations or domains.

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

Procedure

1. Go to *References* > *System Administration* > *Approval Roles* and click *Add New* for each approval role you want to create.

   For example, you might create an approval role called "Training Manager" for each organization. Requests for training within that organization (where organization is the control entity) go through a user in the training manager role and who is controlling that organization.
2. For each user that you want to assign to the role, go to *Users* > *Users* > *Approval Role*.
3. Click *add one or more from list* and then find the approval role you added, select it, and assign it to the user.

4. Click *Control Domains* or *Control Organizations* to add the domains or organizations whose employees this user approves for.

   If you selected domains as your control entity, you see the *Control Domains* link. If you selected organizations as your control entity, you see *Control Organizations*.

   Add at least one control entity and you can add many control entities to the user. You don't need complete coverage for all domains or organizations because the system falls back to the default processes if you don't add a requester's organization or domain to an approval role and user.

Next Steps

Assign the approval role to an approval process.

Related Information

Learning Approval Process Global Application Settings [page 946]
Learning Approval Process Global Application Settings [page 946]
Advice for Creating Approval Processes for Self-Registration [page 984]

23.3.4.2.2 Copying a SAP SuccessFactors Learning Approval Process

Copy an approval process to create a new approval process by using an old approval process as a template.

Context

If you have a complex approval process and you want to use it as a template for another approval process, you can copy it and then make adjustments.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *References* > *System Administration* > *Approval Process*.
2. Find and open the approval process that you want to use as a template.
3. Click *Copy Approval Process* and then type a new process ID and a new process name.

   When you copy an existing approval process, the system requires that you enter a new process ID because you are creating a new instance of the existing process; however, the new instance does not link to the old process.

In the *New Process Name* box, we recommend that you enter a descriptive name so that administrators can identify the process more easily.

4. Click *Copy*.

   Each new process that you create starts at version number one.

5. Edit the new process.

Related Information

Learning Approval Process Global Application Settings [page 946]

23.3.4.2.3 Setting Learners' Approval Roles

Set learners' approval roles so that they can be included in approval processes.

Prerequisites

Define approval roles as part of creating an approval process.

Context

Learners' approval roles determine how they fit into an approval process. For example, you can create a process that requires approval from a particular person, like the head of an organization. You can assign that person to the role.

Procedure

1. Go to Learning Administration and then go to *People* > *Users*.
2. Find and open the user who you want to assign into an approval role.
3. Go to *Approval Roles*.
4. Click *Add one or more from list* to look up and add the approval role.

23.3.4.2.4 Learning Approval Process Global Application Settings

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

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

23.3.4.2.5 SAP SuccessFactors Learning Approval Process Steps Fields

Change the approval process steps fields to affect the routing of the approval process.

You can edit the approval process step fields by going to SAP SuccessFactors Learning Administration and then going to *References* > *System Administration* > *Approval Process*.

This Field...	...Is used as follows
Step Number	The lower the step number the earlier in the process that the approval is routed to that step. Step number 1 is the first step in the approval process.
Security Domain ID	The step name orients approvers to the place in the process. For example, if the first step is to get sign-off from a manager, you can call the step "Manager Enrollment Approval".
Approval Roles	An approval role is a user whose identity is dynamic, based on the user getting approval. SAP SuccessFactors Learning. For example, the approval role of *Manager Level 1* is users' immediate manager. The individual who is the manager changes based on the user who is getting the approval.
Users	An approving user is a static user who must approve the training. Unlike an approval role, the user doesn't change based on the identity of the person getting approval.

Related Information

Learning Approval Process Global Application Settings [page 946]

23.3.4.2.6 SAP SuccessFactors Learning Approval Process Summary Fields

Approval process summary fields contain basic information about the approval process.

You can edit the approval process summary fields by going to SAP SuccessFactors Learning Administration and then going to *References* > *System Administration* > *Approval Process*.

This Field...	...Is used as follows
Process Name	If you edit the process name, then we recommend that you create a descriptive naming strategy so that users can identify the approval process more easily.

This Field...	...Is used as follows
Domain ID	You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.
Owner Email	We recommend that you record the e-mail address of the person who maintains or owns the record so that other administrators have a contact if they need to use or modify the record.
Comments	We recommend that you 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 can't be viewed in the user interface.

Related Information

Learning Approval Process Global Application Settings [page 946]

23.3.4.2.7 Default Approval Roles vs Custom Approval Roles

Before you create an approval process, decide if you need custom approval roles or if you can use the default approval roles.

When possible, use the default approval roles. When you use default approval roles, you need less configuration of your system, including a less strict domain or organization structure. Use custom approval roles if you have a strict organization or domain structure and you cannot use the default approval roles.

Default Approval Roles

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

- Employee: The employee himself or herself. You might have an approval process for the employees to acknowledge enrollment requests before they are forwarded to managers.

- Manager Level 1: The person in this role is always the employees' immediate manager.
- Manager Level 2: The person in this role is the second level manager (the employees' managers' manager).
- Instructor: This is for the E-signature Process only. We do not expect that the approval will be sent to the instructor upon registration.
- HRBP: A Human Resources Business Partner (HRBP) to share some of the managerial responsibilities with a manager.

Custom Approval Roles

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

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

Related Information

Learning Approval Process Global Application Settings [page 946]

23.3.4.2.8 SAP SuccessFactors Learning Approval Roles

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

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

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

Default Approval Roles

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

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

Custom Approval Roles

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

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

Related Information

Learning Approval Process Global Application Settings [page 946]

23.3.4.3 Setting an Approval Process for Enrolling into a Course

Set an approval process for enrolling into courses if you want users to seek approval before they are allowed to enroll.

Prerequisites

Create at least one approval process. You usually create approval processes during implementation or when you review your implementation, so chances are that this is already done for you.

Check your registration settings. You usually configure your registration settings during implementation or when you review your implementation, so chances are that your registration settings are as you want them.

Procedure

1. Go to *Learning Activities* > *Items*, search for the learning item that you want to add the enrollment approval process to, and open it.
2. Click *View All*.
3. Find *Approval Required* and set it to *Yes*.
4. Find *Approval Process* and set it to the enrollment approval process that you want to associate with course.

   All instances of this course associated with this learning item inherit the settings. You can break the inheritance in the class record.

23.3.4.4 Setting an Approval Process for Withdrawing from Courses

Set an approval process for withdrawing from courses if you want users to seek approval before they're allowed to unenroll.

Prerequisites

Create at least 1 approval process. You usually create approval processes during implementation or when you review your implementation, so chances are that this is already done for you.

Check your registration settings. You usually configure your registration settings during implementation or when you review your implementation, so chances are that your registration settings are as you want them.

Context

If you have enrolled users into a course, you might want them to seek approval before they withdraw from it. For example, if you've paid for them to attend the course, and if you'll lose your payment if they withdraw, you can ask them to seek approval to withdraw.

Procedure

1. Go to *Learning Activities* > *Items*, search for the learning item that you want to add the withdrawal approval process to, and open it.
2. On the *Item Details* tab, find *Approval required to withdraw* and set it to *Yes*.
3. Find *Withdraw Approval Process* and set it to the withdrawal approval process that you want to associate with course.

   All classes associated with this learning item inherit the settings. You can break the inheritance in the class entity.

23.3.4.4.1 Editing Cancellation Policies in Learning Items

When you change the cancellation policy on a learning item that has an instructor-led section, you're prompted to manage the change through the *Master Inventory* wizard.

Procedure

1. Go to Learning Administration and then go to *Learning Activities* > *Items* > *Pricing*.
2. Select a new cancellation policy in *Cancellation Policy ID*.

   > **Note**
   >
   > You only see the cancellation policy if the item is scheduled or has a section that can be scheduled. This is because cancellations apply to withdrawing from a schedule. If a course is online and users can take it anytime , for example, they don't withdraw from it.

3. When prompted to propagate the change, select *Yes*.

   Selecting *Yes* pushes the change to master inventory so that all classes that inherit this cancellation policy get the new policy.
4. In the *Master Inventory* wizard, select the classes that are based on the learning item and should inherit the new cancellation policy.

23.3.4.4.2 Adding Learning Withdrawal Reasons

Add Learning cancellation reasons so that users can select from among the them when they withdraw from a course.

Context

When users withdraw from courses, they can provide a cancellation reason. The cancellation reason helps you understand why a user is withdrawing so that you can determine a proper refund. For example, a user can cancel because of a work responsibility. They appear to approvers during a cancellation approval process and they appear in registration reports. They apply to end users, supervisors, and administrators.

Procedure

1. Go to Learning Administration, and then go to *References* > *Learning Activities* > *Withdrawal Reasons*.
2. Choose *Add New*.
3. Add an ID and then a *Description* that helps learners understand the cancellation reason.
4. Select *Active* to make this available for use.
5. Choose *Add*.

23.3.4.4.3 Collecting Cancellation Reasons at the Time of Withdraw

Collect cancellation reasons at the time of withdraw so that you can see why users were withdrawn or withdrew themselves.

Context

Companies often want to know why users withdraw from a course (cancel). For example, users might withdraw because they are ill, because of a work emergency, or because they were taken off the waitlist for an earlier course and already attended. As an organization, you might want to handle each of these cases differently.

Procedure

1. Go to Learning Administration, and then go to *References* > *Learning Activities* > *Cancellation Reasons*.

2. Click *Add New* for each cancellation reason that you want to provide to learners, supervisors, or administrators.

   Users, supervisors, and administrators see the descriptions of the cancellation reason to understand what it means, so type a short, descriptive phrase. For example, type **`Enrolled in Earlier Course`**. If you support multiple languages, localize the description into those languages.
3. To hide any cancellation reason, clear the *Active* box.

   You might hide a cancellation reason, for example, if you are waiting for stakeholders to approve it as a cancellation reason that users and supervisors can select.
4. After you add the cancellation reasons, go to *System Administration* > *Configuration* > *Registration Settings*.
5. Select *By Default Enable Cancellation Reasons for a class*.

   If you select *By Default Enable Cancellation Reasons for a class*, then every new class that you create in the system has its *Enable Cancellation Reason* set to *Yes* (true). Every new class will require users to enter a cancellation reason when they withdraw.

Next Steps

To disable cancellation reasons for any one class, open the class and set *Enable Cancellation Reasons* to *No*.

To report on cancellation reasons, go to SAP SuccessFactors Learning, go to *Reports* and then run either the Self Registration/Withdraw report or any of the three Registration Status reports.

Related Information

Translating Strings in Learning [page 1028]
Adding Learning Withdrawal Reasons [page 953]

23.3.4.4.4 Adding Learning Withdraw (Cancellation) Policies

Add cancellation policies to define how SAP SuccessFactors Learning commerce reconciles accounts when a user cancels on a course (withdraws from a course).

Context

Cancellation policies apply to you if you are using the commerce features of SAP SuccessFactors Learning. You use cancellation policies to create rules that Learning uses when users withdraw from a course. The policy determines how refunds are applied and costs are reconciled.

> **Note**
>
> Although it is confusing, a cancellation policy applies to when users withdraw from a course.

Procedure

1. Go to Learning Administration, and then go to *References* > *Commerce* > *Cancellation Policies*.
2. Click *Add New*.
3. Select *Enable* to enable other administrators to attach the cancellation policy to learning items and classes.
4. In the large *Description* box, type a description of the cancellation policy for users to read.

   This cancellation policy description warns users of penalties for withdrawing from the course.
5. Click *Apply Changes*.
6. Click *Rules*.
7. Decide on the earliest time frame that should enforce a cancellation policy.

   For example, if you want to say that if users cancel (withdraw) any time after they register and two weeks before the start of the course, they won't be charged, then your earliest time frame is two weeks (14 days).
8. Type the start of the earliest time frame, in days, relative to the start of the course, in *Delivery Offset*.

   For example, if your earliest time frame is two weeks (14 days) before the course, type **14**.
9. In *Cancellation Charge*, select the penalty for withdrawing from the course.

This Choice...	...Results in this Effect
No Charge	Users are not penalized if they cancel within the time frame that you set in *Delivery Offset*. This is usually the selection for the highest (or earliest) delivery offset because you want to give users a chance to withdraw if it gives enough time for another user to take their place. • Full price charged for cancellation within the delivery offset. • Percentage of the full price charged for cancellation within delivery offset. • Fixed amount of money charged for cancellation within delivery offset.
Charge Full Price	Users are charged the full price of the class if they cancel within the time frame you set in *Delivery Offset*. This is usually the lowest (or latest) delivery offset because users have given the least notice. If you set a negative number or a zero in the delivery offset, and you select *Charge Full Price*, you set a rule that users are charged full price if they cancel after the course begins.

This Choice...	...Results in this Effect
Charge Percentage	Users are charged a set percentage for withdrawing within the time frame you set in *Delivery Offset*. Percentages often work better than fixed prices in cancellation policies, especially if you are using multiple currencies. When users cancel, they are charged a percentage in whatever currency is paying for the course.
Charge Fixed Amount	Users are charged a fixed price for withdrawing within the time frame you set in *Delivery Offset*. You must also select a currency.

10. Click *Add*.

    The system adds the rule in *Update the Rules for the Cancellation Policy*.
11. Add additional rules.

    The next time frame is based on the end of the earliest time frame. For example, if the first rule you created has a delivery offset of 14 days and you add a new rule with a delivery offset of 7 days, then the new rule is in effect when users cancel between 14 days and 7 days of the start of the course.
12. Type a number of days **after registration** that users can cancel without penalty in *Grace Period*.
13. Click *Apply Changes*.

Next Steps

After you create cancellation policies for the first time, set the default cancellation policy for administrators who create new learning items.

Go to the master inventory and set the cancellation policies for learning items. Go to *Finanace* > *Master Inventory*.

23.3.4.4.5 Setting a Default Cancellation Policy for Learning Administrators

Set a default cancellation policy so that when learning administrators create a new learning item (course) the cancellation policy defaults to your chosen value.

Prerequisites

Add cancellation policies so that you can select one as the default. Adding Learning Withdraw (Cancellation) Policies [page 954]

Procedure

1. Go to SAP SuccessFactors Learning and then go to *System Administration* > *Configuration* > *Global Application Settings*.
2. Select the default cancellation policy for administrators creating new learning items in *Default Item Cancellation Policy*.

23.3.4.4.6 Course Withdrawal Approval

Administrators can require an approval process to withdraw from a course.

Withdrawal approval requires a user to seek approval before withdrawing from a class. Withdrawal approval uses the standard approval process framework. It applies to enrolled or waitlisted users. If users are pending approval for enrollment and then withdraw from the class, the withdrawal approval process isn't initiated.

When an enrolled or waitlisted user attempts to withdraw from a class that requires withdrawal approval, the user sees that approval is required to withdraw and sees a refund amount, if applicable. If users see that approval is required and decide to remain enrolled, they can cancel their withdrawal request as long as they haven't submitted it.

If users submit their requests to withdraw, the users remain enrolled until the approval process completes. The impact on the roster is as follows:

- The seat remains occupied by the user who has requested the withdrawal until the approval process completes.
- The status of the user in the roster is *Pending Withdrawal Approval*. the user sees the status in the *My Learning Assignments* tile, in the item details, registration page, and library class dates list.
- If the *Hide pending approval requests after registration closes or withdrawal date passes* setting is enabled and the approval **isn't** completed before the last date to withdraw, the approval won't be visible to the approver and user remains enrolled.
- If the approval **isn't** timely, the refund amount could vary from amount displayed to the user when they made the request.

If users' withdrawal requests are approved, the users are withdrawn and refunds are processed according to the cancellation policy on the date of approval. If the withdrawal requests are denied, users remain enrolled in the class.

Related Information

How Withdrawal Approval Is Initiated [page 958]
Setting an Approval Process for Withdrawing from Courses [page 951]

23.3.4.4.7 How Withdrawal Approval Is Initiated

The withdrawal approval process can be initiated from multiple places and by different roles.

Users can initiate the withdrawal approval process when they withdraw from a course at any place in the application (for example, from the details page).

If the *Enforce Approval when Managers or HR Business Partner Registers/Withdraws Employee* setting is selected in *System Administration* > *Application Administration* > *Registration Settings* then the following actions will also initiate the withdrawal approval process:

- Managers withdraw a user from the *My Team* pages.
- Managers or administrators withdraw users in bulk using the *My Team* > *Manager Links* > *Withdraw Employees* function.

Related Information

Course Withdrawal Approval [page 957]

23.3.4.4.8 Refund on Re-Enroll into the Same Course

If you use commerce functionality in SAP SuccessFactors Learning and if you set `fullRefundWhenReenroll` to **`true`**, then this example applies to you. It shows how the system behaves when users drop out of a class and then re-enroll.

Some customers' financial policy states that any cancellation fee is waived if the user re-enrolls for the same class (the same course given at the same time). If that is your policy, you can configure SAP SuccessFactors Learning to automatically issue a full refund to support your re-enrollment policy. To configure your system for the Refund on Re-Enroll policy, go to *System Administration* > *Configuration* > *System Configuration* > *FINANCIAL* and set `fullRefundWhenReenroll` to **`true`**.

When you set `fullRefundWhenReenroll` to **`true`**, the system behaves as follows.

User is Enrolled in Class, it has a Price, and a Cancellation Policy is in Effect

The process begins when a user is enrolled in a class. The system creates an order for the user. For example, ORDERNO-100.

The class must have a price and must have a cancellation policy. In most cases, the cancellation policy refunds some percentage of the price. For the purposes of this example, assume that the refund is 25% of the price. That means that if the price was $1000, a user who withdraws from the class receives $250 dollars in refund.

The enrollment and cancellation policy is standard commerce behavior.

User Withdraws or is Withdrawn from the Class

When users withdraw from the class, they trigger the cancellation policy and refund on the original order (ORDERNO-100). After any withdraw approval process, the order number is updated with the refund. For example, ORDERNO-100 receives a refund of 25%.

Withdraw and refund is standard commerce behavior.

User Re-Enrolls in the Same Class

Refund on Re-Enroll works only when users re-enroll into the same class. For example, if you offer "Business Writing" classes every month, and if they withdrew from the January offering of "Business Writing" they must re-enroll into the January offering of "Business Writing" as opposed to "Business Writing" offered in February. It must be the exact same class.

If `fullRefundWhenReenroll` is set to **`true`**, then when the user re-enrolls, the original order number receives a full refund and a new order number is created for the re-enrollment. In this example, ORDERNO-100 is refunded the remaining 75% of the price and a new order number (ORDERNO-102) is created for $1000. Whoever is re-enrolling the user sees messages that provide information about the refund so that he or she can make informed decisions.

After re-enrollment (and any approval processes), if you go to *Learning Activities* > *Classes* > *Registration* > *Advanced*, you see both order numbers associated with the user.

23.3.4.4.9 Learning Item and Class Cancellation Policy Inheritance Rules

Classes typically inherit the cancellation policy of their parent learning items, but you can break the inheritance.

Learning items and their classes can have independent cancellation policies if *Class Can Override Item Cancellation Policy* is selected on the learning item.

When you set the cancellation policy on a learning item or class, the following rules apply:

- When a new learning item is created, the cancellation policy is set to the system default (which can be blank) and *Class Can Override Item Cancellation Policy* is selected.
- When a new class is created, it has the cancellation policy of its learning item. Administrators can break the inheritance if they have access to the class and if both of the following are true:
  - *Class Can Override Item Cancellation Policy* is selected on the classes' parent learning item
  - The administrator has the Edit Class Cost/Price permission
- When administrators copy a learning item or class, the cancellation policy of the old learning item or class is copied to the new one.
- When administrators revise a learning item, the cancellation policy is transferred to the new revision but isn't available on the old revision.
- Learning item and class connectors support Cancellation Policy ID. If blank, when creating a learning item, the cancellation policy is set to the system default; when creating a class, the cancellation policy is set to that of the parent item.

23.3.4.4.10 Cancellation Descriptions of Learning Cancellation Policies

Cancellation policy descriptions are shown to users before registering, purchasing, or approving learning that has the cancellation policy so that users are informed of penalties for withdrawing from a course.

If you go to Learning Administration and then you go to *References* > *Finance* > *Cancellation Policies* > *Summary*, you see two *Description* boxes. The description box that **can't** be localized contains comments for other administrators. The *Description* box that **can** be localized contains the description of the cancellation policy for users.

When users register into, purchase, or approve courses that are led by an instructor, have a cost, and have a cancellation policy, they see a link that opens the user-facing description in their language. Approval email notifications for registration and withdrawal also include the cancellation policy. You write a description that tells them what they can expect if they withdraw from the course. For example, you can write: "If you cancel one week before the start of the course, you receive a full refund. If you cancel within one week, you receive a 50% refund". Your description helps users understand what happens if they withdraw. Write your description based on the rules you create in *References* > *Finance* > *Cancellation Policies* > *Rules*.

Users see the user-facing cancellation policy description when it's applied to:

- Instructor-led or instructor-led with online content classes
- Classes with a price greater than zero

Related Information

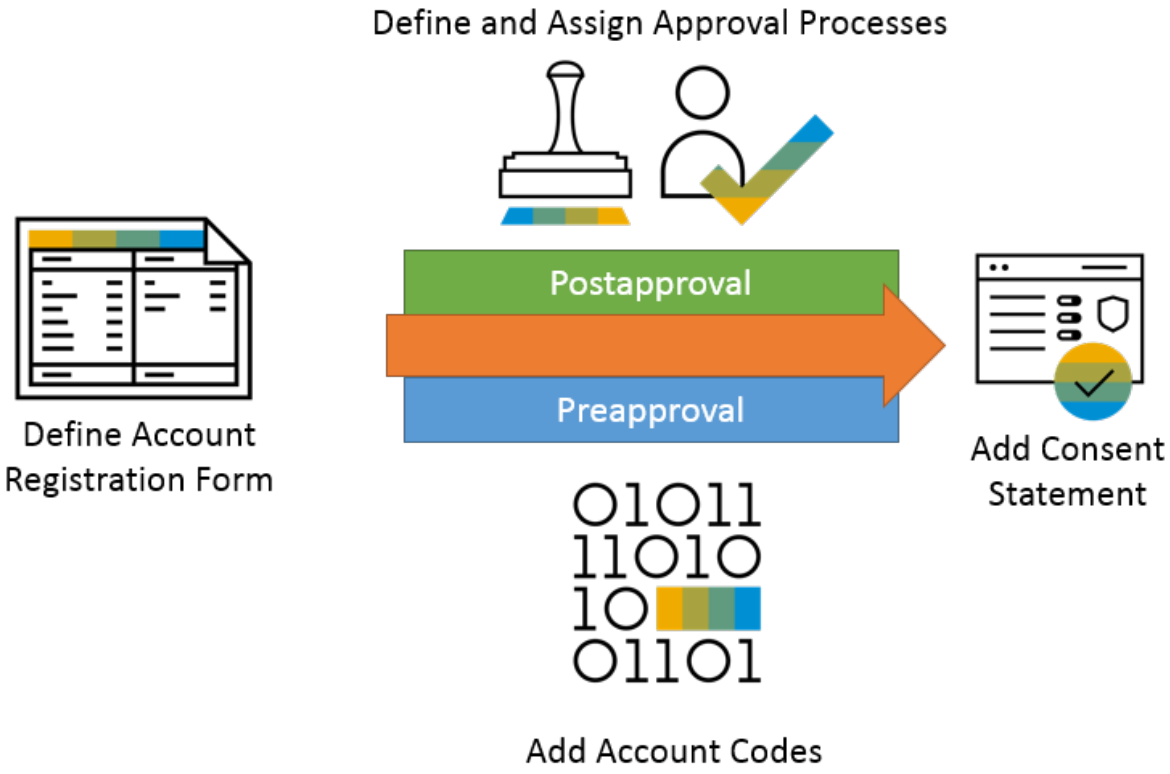
Adding Learning Withdraw (Cancellation) Policies [page 954]

23.3.4.5 Overview of Configuring Account Self-Registration Approval Processes

To configure an account self-registration approval process, decide whether you want to preapprove or postapprove and create the forms for approval.

You almost always create account self-registration processes for your extended enterprise. You want to expose a Learning Site to a group in your extended enterprise, you want them to self-register, but you want to control who can register. You first must decide if you want to preapprove users with site registration codes or if you want to postapprove users with an approval process:

- When you **preapprove** users, you give a set of registration codes to the people who will use the Site. As long as they have a registration code, and use it when they first create their accounts, you assume that they are approved.
- When you **postapprove** users, individual users must be approved through a process after they create their accounts. Typically, approval roles are assigned to organizations and users who sign up in the organization are routed to that approval role.



Registration Form

Any self-registration approval starts with a registration form. Create a registration form that captures the information you need to approve the person for an account.

Postapprove: Approval Process and Assignment

If you decide to use postapprove, create an approval process and assign it to groups with assignment profiles. Typically, you create an approval process that has an approval role per organization. When people sign into a site that belongs to that organization, the approval is routed to the approval role for the organization. You also typically use assignment profiles to assign the approval process to people based on their organization.

Preapprove: Site Registration Codes

If you decide to use, preapprove, add registration codes to the site. You typically add site registration codes in batches so that you can control access more closely.

Consent Statement

In self-registration, approval goes both ways: you approve the person to join the site, but the person should also approve of personal data storage. Create consent statements so that people who sign up at a site can agree or disagree with your personal data statements.

Creating a Site's Registration Form [page 963]
The site's registration form captures information from people who register for their own accounts to become Learning-only users. You can define the information they need to provide when creating the account and the default values for the account.

Creating Self-Registration Approval for Sites [page 969]
Create a self-registration approval process for SAP SuccessFactors Learning sites when you want people who create their own Learning-only user account to be approved before they can log in.

Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Use assignment profiles to require some people to use one approval process when they self-register and other people to use a second approval process when they self-register.

Adding Site Registration Codes [page 972]
Add site registration codes to control who can create an account on your Learning sites.

Scheduling the Set Account Request Approval Process [page 973]
Configure SAP SuccessFactors Learning to associate account requests to become Learning-only users with an approval process so that requests are routed to an approver.

Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Use the Data Privacy Consent Statements (DPCS) life cycle in SAP SuccessFactors Learning if your company seeks consent from users to store personal information.

Advice for Creating Approval Processes for Self-Registration [page 984]
When creating an approval process for self-registration, consider that the approvals are for users who aren't yet in the system.

Self-Registration Approval Notes [page 985]
The approval process to register for an SAP SuccessFactors Learning account has unique behavior.

Controlling Access to SAP SuccessFactors Learning Sites [page 986]
You can control how people create accounts to access SAP SuccessFactors Learning sites.

Overview of Approval Process for Self-Registration [page 986]
You can use an approval process to verify that people who register for a Learning-only account are valid members of your extended enterprise. This process has specific steps and requires someone in your company to approve each person before they can access SAP SuccessFactors Learning.

Approving Account Requests as an Administrator [page 988]
As an administrator, you can approve account requests that are stuck in the approval process.

Creating Automatic Account Reminders for User-Created Accounts [page 989]
Create automatic account reminders for user-created accounts so that users who need to approve account requests are notified of the task.

23.3.4.5.1 Creating a Site's Registration Form

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

Prerequisites

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

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

Context

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

Procedure

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

   User-Created Account (Global) [page 964]
   Use these fields to define how people register for their own accounts and what information they need to provide when creating the account to become a Learning-only user.

   User-Created Account (Site) [page 967]
   Use these fields to control the information you require from people who register for their own accounts to become Learning-only users through a site.

Task overview: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]

23.3.4.5.1.1 User-Created Account (Global)

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

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

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

User Settings

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

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

Instructional Text

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

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

Contact Information

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

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

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

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

Employee Information

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

Finance

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

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

Preferences

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

Custom Fields

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

Parent topic: Creating a Site's Registration Form [page 963]

Related Information

User-Created Account (Site) [page 967]

23.3.4.5.1.2 User-Created Account (Site)

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

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

Contact Information

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

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

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

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

- Country/Region
- Telephone Number

Employee Information

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

Finance

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

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

Preferences

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

Custom Fields

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

Parent topic: Creating a Site's Registration Form [page 963]

Related Information

User-Created Account (Global) [page 964]

23.3.4.5.2 Creating Self-Registration Approval for Sites

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

Prerequisites

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

Context

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

Procedure

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

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

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

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

   For example, two users can both be in the "IT Approvers" role, but controlling two different organizations, like SALES and FINANCE. Learners from the sales organization who request approval are routed to the person who

controls SALES approvals and learners from the finance organization who request approval are routed to the person who controls FINANCE approvals.

5. Choose *Apply Changes*.

Next Steps

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

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

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

Task overview: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]
Advice for Creating Approval Processes for Self-Registration [page 984]
Overview of Approval Process for Self-Registration [page 986]
Self-Registration Approval Notes [page 985]
Default Approval Roles vs Custom Approval Roles [page 948]
Approving Account Requests as an Administrator [page 988]
Creating Approval Processes [page 942]
Creating Automatic Account Reminders for User-Created Accounts [page 989]
Scheduling the Set Account Request Approval Process [page 973]

23.3.4.5.3 Assigning Self-Registration Approval Processes with Assignment Profiles

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

Prerequisites

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

Context

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

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Manage User Learning* > *Assignment Profiles*.
2. Find and open the assignment profile that you created to pool your users for the approval process.
3. Go to *User-Created Account*.
4. In *User-Created Account Process ID*, select the approval process that should be applied to the users in the assignment profile.

Next Steps

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

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

Task overview: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]
Creating Self-Registration Approval for Sites [page 969]
Creating an Assignment Profile [page 1027]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]
Scheduling the Set Account Request Approval Process [page 973]

23.3.4.5.4 Adding Site Registration Codes

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

Context

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

Procedure

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

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

Task overview: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]
Site Registration Codes [page 1269]

23.3.4.5.5 Scheduling the Set Account Request Approval Process

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

Prerequisites

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

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

Context

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

Procedure

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

Next Steps

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

Task overview: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

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

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

Procedure

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

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

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

   Supported Configurations for Consent Agreements in SAP SuccessFactors Learning [page 976]
   Consent agreements support most configurations for the ways that users sign in to SAP SuccessFactors Learning, but they do not support all configuration.

   Adding Data Storage Consent Statements to SAP SuccessFactors Learning [page 977]
   Add data storage consent for SAP SuccessFactors Learning if your data privacy and protection policies require that users consent to your storage of their personal data.

   Publishing Consent Statements in SAP SuccessFactors Learning [page 980]
   Publish Data Privacy Consent Statements (DPCS) in SAP SuccessFactors Learning when you're ready to expose them to users for review and agreement.

   Enabling SAP SuccessFactors Learning Consent Statements [page 982]
   Enable SAP SuccessFactors Learning to show data storage consent statements to employees or to users of Learning sites (external users).

   Reviewing SAP SuccessFactors Learning Consent Agreements [page 983]
   Review SAP SuccessFactors Learning consent agreements to make sure that you're showing users the correct version.

Viewing and Revoking Personal Consent Statements in SAP SuccessFactors Learning [page 983]
View and revoke consent statements in SAP SuccessFactors Learning if you previously accepted a consent statement but you changed your mind.

Task overview: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]

23.3.4.5.6.1 Supported Configurations for Consent Agreements in SAP SuccessFactors Learning

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

Summary of Supported Configurations for Consent Agreements

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

Detail of Supported Configurations for Consent Agreements

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

- Sign In Method: The sign-in method can be either Platform or Learning-only users. It refers to the page that users sign into when they want to use SAP SuccessFactors Learning. Platform sign-in pages are the most

common and give the user access to SAP SuccessFactors. A few customers, however, still allow users to log in through the basic Learning login page or through a site login page.

- User Type: Internal users are employees in your organization or company. External users are part of your extended enterprise and not employees. They access Learning sites for courses.
- User Exists in Platform: A few platform customers continue to create users in Learning as Learning-only users. These users are not known to SAP SuccessFactors Platform.
- Consent Enabled: Is consent agreements enabled for the organization or company?

Sign In Method	User Type	User Exists in Platform	Consent Enabled?	Details
Platform	Internal	Yes	No	External learners cannot sign in from the platform sign-in page.
Legacy Plateau *Login*	Internal	No	Yes	Not supported
Legacy Plateau *Login*	Internal	Yes	Yes	Not supported
Legacy Plateau *Login*	External	No	Yes	Some platform customers created external users before platform integration was enabled for sites.

23.3.4.5.6.2 Adding Data Storage Consent Statements to SAP SuccessFactors Learning

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

Prerequisites

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

Procedure

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

   For example, type **`Consent to Store Personal Data`**.

4. In *Title*, click the localization icon *Open localization popup* to translate the title into all available languages.

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

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

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

Guidelines for SAP SuccessFactors Learning Consent Statements [page 978]
When you upload a consent statement to SAP SuccessFactors Learning, it should meet the guidelines for usage.

Deleting Draft SAP SuccessFactors Learning Consent Statements [page 979]
Delete draft SAP SuccessFactors Learning consent statements when you make a mistake uploading documents and you want to prevent others accidentally publishing bad versions of consent statements.

Personal Data Consent for SAP SuccessFactors Learning [page 980]
Personal data consent, which is the ability for users to consent to saving personal data in SAP SuccessFactors works differently for Learning than for other parts of SAP SuccessFactors.

23.3.4.5.6.2.1 Guidelines for SAP SuccessFactors Learning Consent Statements

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

Guideline	Description
Accessible to Screen Readers	We recommend that you create documents that are accessible to screen readers so that users of screen reader technology can understand the text of the consent statement.
Translated	We support multiple languages for consent statements. We recommend that you create a consent statement for each locale that you've enabled in SAP SuccessFactors Learning.

Guideline	Description
Reviewed and archived	We track the versions of consent documents to match the version of the consent that a user agreed to with the time and date of consent. We don't recommend that you use SAP SuccessFactors Learning for the revisions of documents that you pass, for example, among your legal team to develop consent forms. Instead, we recommend that you follow your company process and that you archive according to your company policy.

Parent topic: Adding Data Storage Consent Statements to SAP SuccessFactors Learning [page 977]

Related Information

Deleting Draft SAP SuccessFactors Learning Consent Statements [page 979]
Personal Data Consent for SAP SuccessFactors Learning [page 980]

23.3.4.5.6.2.2 Deleting Draft SAP SuccessFactors Learning Consent Statements

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

Procedure

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

Next Steps

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

Task overview: Adding Data Storage Consent Statements to SAP SuccessFactors Learning [page 977]

Related Information

Guidelines for SAP SuccessFactors Learning Consent Statements [page 978]
Personal Data Consent for SAP SuccessFactors Learning [page 980]
Adding Data Storage Consent Statements to SAP SuccessFactors Learning [page 977]
Guidelines for SAP SuccessFactors Learning Consent Statements [page 978]

23.3.4.5.6.2.3 Personal Data Consent for SAP SuccessFactors Learning

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

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

In SAP SuccessFactors Learning, we simply display the consent documents that you create and record users' agreement to a particular version of the document. Usually with your legal team, you manage the text of the document, the revision process of the document, and the retirement of a consent document. We recommend that you establish a process for creating and reviewing the consent statements.

Parent topic: Adding Data Storage Consent Statements to SAP SuccessFactors Learning [page 977]

Related Information

Guidelines for SAP SuccessFactors Learning Consent Statements [page 978]
Deleting Draft SAP SuccessFactors Learning Consent Statements [page 979]

23.3.4.5.6.3 Publishing Consent Statements in SAP SuccessFactors Learning

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

Prerequisites

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

Context

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

Procedure

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

   Although this step isn't required, we do recommend it because the statements that are currently published are automatically archived when you publish the draft versions. Make sure that you're ready to archive all published consent statements.
3. Go back to the list of consent statements.
4. Click *Draft*, and then check all draft statements.

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

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

Related Information

Deleting Draft SAP SuccessFactors Learning Consent Statements [page 979]
Guidelines for SAP SuccessFactors Learning Consent Statements [page 978]

23.3.4.5.6.4 Enabling SAP SuccessFactors Learning Consent Statements

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

Prerequisites

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

Procedure

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

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

23.3.4.5.6.5 Reviewing SAP SuccessFactors Learning Consent Agreements

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

Procedure

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

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

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

Next Steps

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

23.3.4.5.6.6 Viewing and Revoking Personal Consent Statements in SAP SuccessFactors Learning

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

Procedure

1. Log in to SAP SuccessFactors and then select *Learning*.

2. Click *Options and Settings*.
3. In *Data Privacy Consent*, click *Data Privacy Consent Statement* to view the consent statement that you accepted.

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

23.3.4.5.7 Advice for Creating Approval Processes for Self-Registration

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

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

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

Parent topic: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Self-Registration Approval Notes [page 985]

Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]
Default Approval Roles vs Custom Approval Roles [page 948]
Creating Approval Processes [page 942]
Learning Approval Process Global Application Settings [page 946]

23.3.4.5.8 Self-Registration Approval Notes

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

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

Parent topic: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]

23.3.4.5.9 Controlling Access to SAP SuccessFactors Learning Sites

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

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

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

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

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

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

Parent topic: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]

23.3.4.5.10 Overview of Approval Process for Self-Registration

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

You can enable people in your extended enterprise to create their own accounts to access SAP SuccessFactors Learning. These people can create their account through a basic access URL or through site. For people creating

accounts through a basic access URL, you can require approval before granting access to Learning. For people creating accounts through sites, you can choose to control access either through an approval process or through registration codes. For basic access, the decision is made for all users. For site access, the decision is made for each site.

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

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

Parent topic: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Approving Account Requests as an Administrator [page 988]
Creating Automatic Account Reminders for User-Created Accounts [page 989]

23.3.4.5.11 Approving Account Requests as an Administrator

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

Context

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

Procedure

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

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

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

Next Steps

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

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

Task overview: Overview of Configuring Account Self-Registration Approval Processes [page 960]

Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Creating Automatic Account Reminders for User-Created Accounts [page 989]

23.3.4.5.12 Creating Automatic Account Reminders for User-Created Accounts

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

Prerequisites

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

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

Procedure

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

If the number of notifications sent to an approver exceeds the maximum, the request is still active, but the system no longer sends messages. If you don't provide a value, there's no maximum: the approver receives reminders indefinitely.

4. In *Reminder period*, set the number of days that the system should wait before resending a reminder.

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

5. Click *Apply Changes*.

Example

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

Task overview: Overview of Configuring Account Self-Registration Approval Processes [page 960]

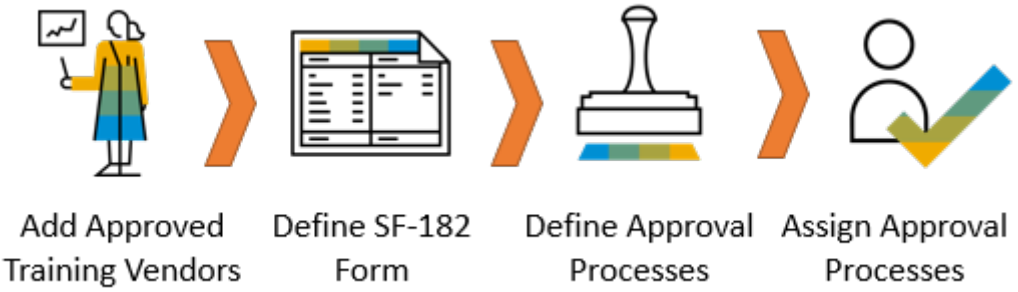
Related Information

Creating a Site's Registration Form [page 963]
Creating Self-Registration Approval for Sites [page 969]
Assigning Self-Registration Approval Processes with Assignment Profiles [page 971]
Adding Site Registration Codes [page 972]
Scheduling the Set Account Request Approval Process [page 973]
Setting Up and Using the Consent Statement Life Cycle in SAP SuccessFactors Learning [page 975]
Advice for Creating Approval Processes for Self-Registration [page 984]
Self-Registration Approval Notes [page 985]
Controlling Access to SAP SuccessFactors Learning Sites [page 986]
Overview of Approval Process for Self-Registration [page 986]
Approving Account Requests as an Administrator [page 988]
Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.3.4.6 Overview of Configuring an External Learning Request (SF-182) Process

To configure an external learning request (SF-182) process, you add approved training vendors, configure the form itself, and define the approval processes for the form. Then you assign the different approval processes to different groups of users.

Before you configure SF-182 forms, check with the General Services Administration (GSA) of the U.S. Federal government and with your organization's process owners. Follow their advice to implement a correct form and process. After you have the advice, you configure the SF-182 process in stages.



SF-182 Configuration Process

Setting Up Approved Training Vendors

You set up approved training vendors so that users can select from a list of vendors that you approve. The form auto populates with the vendor's information. Depending on the form configuration, they can also add extra vendors at the moment they complete the form.

Defining the SF-182 Form

From time to time, the GSA updates the SF-182 form. You can adjust your electronic copy in SAP SuccessFactors so that you don't need to start over. Additionally, you can add instructions to the sections of the form.

Defining Approval Processes for the SF-182 Form

Set up both the submission and the verification processes for the SF-182 form. You create these as standard approval process, but you also define the default processes that SAP SuccessFactors fallback to if assignment profiles can't add the correct processes to learners.

Assigning SF-182 Approval Processes

Create the assignment profile processes that assign the correct submission and verification processes to different groups of learners.

Adding Approved Training Vendors [page 993]
Add approved training vendors if your learners use Standard Form 182 (SF-182) to request training. SF-182 forms are common for U.S. Federal customers.

Adding Training Types [page 994]
Add training types if your organization is affiliated with the U.S. Federal Government and you need a list of Training Type Codes on your SF-182 form.

Adding Delivery Types for External Learning [page 995]
Add delivery types if your organization is affiliated with the U.S. Federal Government and you need a list of delivery type codes on your SF-182 form.

Adding Learning Designation Types [page 996]
Add designation types if your organization is affiliated with the U.S. Federal Government and you need a list of Designation Type Codes on your SF-182 form.

Adding Learning Training Credit Types [page 997]
Add training credit types if your organization is affiliated with the U.S. Federal Government and you need a list of Training Credit Type Codes on your SF-182 form.

Adding Learning Training Sources [page 998]
Add training sources if your organization is affiliated with the U.S. Federal Government and you need a list of Training Source Codes on your SF-182 form.

Adding Learning Training Purposes [page 999]
Add training purposes if your organization is affiliated with the U.S. Federal Government and you need a list of Training Purposes on your SF-182 form.

Modifying External Learning Request (SF-182) Forms [page 1000]
Modify external learning request forms if you use the U.S. Federal SF-182 form for external learning requests, and you want to change what users and administrators see on the form while creating an external learning event request.

Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Submit external Learning requests (SF-182) in bulk when you have many users who will attend the same training and must all complete an SF-182 form (or your version of the form).

Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Set the default processes for external learning requests (SF-182) if you use Standard Form 182 and the General Services Administration (GSA) request process for U.S. Federal organizations.

Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
If you're using external learning requests (SF-182 forms for U.S. Federal Government customers), assignment profiles match users to their external learning request approval processes.

Troubleshooting External Learning Requests (SF-182) [page 1006]
United States Federal workers complete Standard Form 182 (SF-182) to request external training. You often troubleshoot a request in process for a particular learner.

External Learning Request (SF-182) Approval Process [page 1008]

External learning request (SF-182) approval processes differ from other types of approval process because they have two parts: a submission approval process and a verification approval process.

Configuring an Attachment for External Learning Request (SF-182) [page 1009]
Find out how to configure an attachment for External Learning Request and Verification in SF-182 form.

23.3.4.6.1 Adding Approved Training Vendors

Add approved training vendors if your learners use Standard Form 182 (SF-182) to request training. SF-182 forms are common for U.S. Federal customers.

Context

SF-182 forms are easier to complete when learners can select from a list of approved training vendors. You manage the list of vendors that they can select from. In most cases, you set up an initial list and then maintain it periodically as your organization adds and removes vendors.

> ⓘ Note
>
> The General Services Administration (GSA) manages the SF-182 process. Check GSA information about training vendors.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Manage Users Learning* > *Training Vendors*.
2. To add vendors, click *Add New*, and then enter the vendor contact information and the accreditation information.

   > → Tip
   >
   > The accreditation information helps you manage the vendors later. You can, for example, download your vendors with their accreditation date so that you can investigate their status.
3. To edit or investigate a vendor, search for the vendor and then view it or edit it.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Training Types [page 994]

Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.2 Adding Training Types

Add training types if your organization is affiliated with the U.S. Federal Government and you need a list of Training Type Codes on your SF-182 form.

Context

If your organization's users must complete an external training request form (SF-182), then you need to enumerate **your** training types. Your users can then select from among your training types in the *Training Type Code* and the *Training Sub Type Code* box of the SF-182 form.

Procedure

1. Go to Learning Administration, and then go to *References* > *External Learning* > *Training Types*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps learners understand the training type.
4. Click *Add*.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Delivery Types for External Learning [page 995]

Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.3 Adding Delivery Types for External Learning

Add delivery types if your organization is affiliated with the U.S. Federal Government and you need a list of delivery type codes on your SF-182 form.

Context

Certain employees affiliated with the U.S. Federal Government must complete an SF-182 Form when they request external training. As part of the form, the employee must choose a delivery type code. You enumerate the list of values in delivery types.

Procedure

1. Go to *Learning Administration* > *References* > *External Learning* > *Delivery Types* .
2. Choose *Add New*.
3. In *Delivery Type Code ID* , enter a unique identifier for the delivery method.
4. In *Description*, enter a descriptive value for the delivery method that helps learners and administrators understand the delivery type.
5. Choose *Add*.
6. **Optional:** In *Edit the Delivery Type Reference*, you can modify the description, if necessary and choose *Apply Changes*.
7. Close the page.

Results

The new delivery type is added. It will now be available for use when creating or editing external learning events.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.4 Adding Learning Designation Types

Add designation types if your organization is affiliated with the U.S. Federal Government and you need a list of Designation Type Codes on your SF-182 form.

Context

Certain employees affiliated with the U.S. Federal Government must complete an SF-182 Form when they request external training. As part of the form, the employee must choose a Designation Type Code. You enumerate the list of values in designation types.

Procedure

1. Go to Learning Administration, and then go to *References* > *External Learning* > *Designation Types*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps learners understand the designation type.
4. Click *Add*.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.5 Adding Learning Training Credit Types

Add training credit types if your organization is affiliated with the U.S. Federal Government and you need a list of Training Credit Type Codes on your SF-182 form.

Context

If your organization's users must complete an external training request form (SF-182), then you need to enumerate **your** credit types. Your users can then select from among your credit types in the *Training Credit Type Code* box of the SF-182 form.

Procedure

1. Go to Learning Administration, and then go to *References* > *External Learning* > *Training Credit Types*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps learners understand the training credit type.
4. Click *Add*.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.6 Adding Learning Training Sources

Add training sources if your organization is affiliated with the U.S. Federal Government and you need a list of Training Source Codes on your SF-182 form.

Context

If your organization's users must complete an external training request form (SF-182), then you need to enumerate **your** training sources. Your users can then select from among your training sources in the *Training Source Type Code* box of the SF-182 form.

Procedure

1. Go to Learning Administration, and then go to *References* > *External Learning* > *Training Sources*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps learners understand the training source.
4. Click *Add*.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.7 Adding Learning Training Purposes

Add training purposes if your organization is affiliated with the U.S. Federal Government and you need a list of Training Purposes on your SF-182 form.

Context

If your organization's users must complete an external training request form (SF-182), then you need to enumerate **your** training purposes. Your users can then select from among your credit types in the *Training Purpose Type* box of the SF-182 form.

Procedure

1. Go to Learning Administration, and then go to *References* > *External Learning* > *Training Purposes*.
2. Click *Add New*.
3. Add an ID and then a *Description* that helps learners understand the training purpose.
4. Click *Add*.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.8 Modifying External Learning Request (SF-182) Forms

Modify external learning request forms if you use the U.S. Federal SF-182 form for external learning requests, and you want to change what users and administrators see on the form while creating an external learning event request.

Context

Many U.S. Federal customers us Standard Form (SAP Forum [Location]) 182 to request external training. You can configure the form that administrators and users see when they create an external learning event request. Because it's a standard form, the most common change is to write or clarify instructions and to tie the SF-182 form fields to custom fields that you created at the beginning of your implementation project so that they automatically complete.

> **Note**
>
> You can't change how the system orders or groups fields in a section, but if you don't include any fields in a section, then the system hides that section, its heading, and its instructional text when administrators or users create a new external learning request.
>
> This is because all of the section names are hard coded (including the Applicant's Name section) as per the SF-182.
>
> These can be globally renamed using labels, but not removed. This is working as designed.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Admin* > *Configuration* > *External Learning Request*.
2. In *Instructional Text* look at each section (A, B, and C) and add or edit the instructions to your users or administrators.

   At runtime, administrators and users click *Instructions* for each section to read your instructions.
3. In *User Information*, find the form fields that have a list.

   Date of Birth is a common form field with a list because it can usually pull date of birth from the users' attributes.
4. From the list, select the user custom field that contains the data.

   If you don't see a list, then explore creating a new custom field to store the data about the user so that the form can read it at runtime. Go to *System Administration* > *Custom Fields* > *User*.

   When users are completing the form, the form populates the user's information from their custom attributes, if it can find the value (some information can be missing, in which case the user can type it in the form).

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.9 Submitting External Learning Requests (SF-182) in Bulk

Submit external Learning requests (SF-182) in bulk when you have many users who will attend the same training and must all complete an SF-182 form (or your version of the form).

Prerequisites

The bulk request tool reads the users' personal information from their records, so for every required field in Section A of the form, the learning management system must have a matching value in the user record. For example, Section A includes Social Security Number and Date of Birth. The system reads those values from the users' records in the learning management system. If the values don't exist for a user, the tool cannot complete the form for the user.

External learning requests are built to handle U.S. Federal customers because the SF-182 form is a standard requirement for U.S. Federal employees to attend training. If you administer a U.S. Federal customer, chances are you already have all of the values you need in the user records because the customer expects to complete these forms.

Procedure

1. Go to Learning Administration, and then go to *Manage Users Learning* > *Create External Learning Requests*.
2. Launch the wizard and follow it, using the on-screen instructions to complete it.

   The wizard is a two step process. In the first step, you select the users who will attend training. In the second step, you complete the SF-182 form (except for the user information, which will vary per user).

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]

Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.10 Setting the Default Processes for External Learning Requests (SF-182)

Set the default processes for external learning requests (SF-182) if you use Standard Form 182 and the General Services Administration (GSA) request process for U.S. Federal organizations.

Prerequisites

Create the learning approval processes that you want to use as your default processes. For SF-182 processes, you usually create two:

- A **submission** process that learners must use to submit their SF-182 requests
- A **verification** process the learners must use to verify that they attend and completed the course they requested

Most customers also set their control entity for approval roles before creating the SF-182 processes.

The control entity for approval processes determines how the system looks up the user who should receive approval requests when an approval role has multiple users in it. Each approver is responsible for one or more organization or domain's approvals in that role. If your company's org structure is defined by organizations, then choose *Organizations*. If it is reflected in your domains, choose *Domains*.

Context

Check with the GSA and your organization to get the latest advice for the SF-182 process.

You set the default processes for SF-182 in case individual learners are **not** assigned the processes through assignment profiles. The default processes catch learners who are unassigned and give them a standard process. Learners **should** be assigned a process through assignment profiles.

Procedure

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

2. Find the section *Approval Process Settings*.
3. Define the external learning request default values.

Option	Description
External Submission Default Process ID	Select the submission approval process that SAP SuccessFactors should fall back to if it can't assign learners to the correct process through assignment profiles.
External Verification Default Process ID	Select the verification approval process that SAP SuccessFactors should fall back to if it can't assign learners to the correct process through assignment profiles.
Enable External Submission User Message **and** *External Submission User Message*	Select *Enable External Submission User Message* to send users a confirmation message that SAP SuccessFactors received the SF-182 form. Type the message in *External Submission User Message*.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.11 Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users

If you're using external learning requests (SF-182 forms for U.S. Federal Government customers), assignment profiles match users to their external learning request approval processes.

Context

Add an external learning request process to an assignment profile to standardize external learning request submission and verification process. Users who are captured by the assignment profile rules must submit external learning requests through the submission process you identify and must verify their training through the verification process you identify.

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

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *Manage User Learning* > *Assignment Profiles*.
2. Click *Add New* to create a new assignment profile.
3. In the new assignment profile, define the rules of the assignment profile.

   The rules create a pool of users by user attribute. All users in the pool get the same external learning request process.
4. Go to *External Learning Requests*.
5. In *External Submission Process ID*, select the process that this pool of learners uses to submit their SF-182 forms for approval so that they can attend the course.
6. In *External Verification Process ID*, select the process that this pool of learners uses to verify that they attended the course they were approved for.
7. Click *Save*.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]

Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]
Creating an Assignment Profile [page 377]
Assignment Profile Process for Bulk Assignment [page 377]
Executing Changes for Assignment Profile Rules [page 382]
Manually Updating Assignment Profiles [page 383]
Assignment Profile Propagation Status [page 385]

23.3.4.6.12 Troubleshooting External Learning Requests (SF-182)

United States Federal workers complete Standard Form 182 (SF-182) to request external training. You often troubleshoot a request in process for a particular learner.

Context

In the external learning request work area, you investigate learners' external learning requests so that you can unblock the process. You most often troubleshoot external learning requests because you hear from a learner or a manager that something is wrong. You see requests that users submitted themselves and also requests that someone submitted on the learners' behalf.

> ⓘ Note
>
> Depending on how you configured your system, your learners are able to troubleshoot their own requests too. We offer an *External Learning Requests* area for learners.

> → Tip
>
> You often communicate with the individual learner who is experiencing the trouble. You can find learners' contact information in their learner profile (*People* > *Users*).

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the learner who is having trouble with the SF-182 request.
3. Go to *External Learning Requests*.
4. Look at the approval status in *Approval Process for Submission*.

   Requests often run into trouble during the approval process. For example, a manager must approve the request but they are on leave. The learner doesn't know who can approve the request. You can try to contact the person holding approval or you can approve the process yourself (depending on your permissions).
5. To see details of the request and edit incorrect information that learners have entered by mistake, click *Edit Request*.
6. If someone submitted the request by mistake or no longer wants to make the request, click *Withdraw Request*.

Task overview: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
External Learning Request (SF-182) Approval Process [page 1008]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.12.1 External Learning Request (SF-182) Troubleshooting Fields

These settings describe each external learning request of the user to help you troubleshoot the request.

Field	Description
Request ID	The unique ID of this particular request. Each individual request for external training gets its own ID. You can use it match against or distinguish among other requests.
Title	The title is a friendly name for the individual request, and it's likely the name that your users are familiar with. When speaking with a user, refer to a request by its title.
Status	Use status to understand where the external learning request is in the approval process. The status affects the actions available to you and it helps you understand any problems that the user is having, what they need to do next, and so on.

23.3.4.6.13 External Learning Request (SF-182) Approval Process

External learning request (SF-182) approval processes differ from other types of approval process because they have two parts: a submission approval process and a verification approval process.

Standard Form 182 (SF-182) processes are used by U.S. Federal employees and organizations to request, monitor, and approve requests for learners to attend courses outside of the organization. Learners have two different approval processes at two different times:

- Before the course begins, learners submit an SF-182 form, which is governed by the General Services Administration (GSA). With SAP SuccessFactors, you can configure the form to match your organization and the latest from the GSA, and you can also configure the approval process for attending the course.
- After the course is over and the user completed it, there's a verification process to assure that the learner attended the course. The verification process, like the submission process, is governed by the GSA. Typically, a manager verifies that the learner attended the course.

Parent topic: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]

Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
Configuring an Attachment for External Learning Request (SF-182) [page 1009]

23.3.4.6.14 Configuring an Attachment for External Learning Request (SF-182)

Find out how to configure an attachment for External Learning Request and Verification in SF-182 form.

Ensure External Learning Configuration is set to true under *System Administration* > *System Configuration* > *Attachments*.

Parent topic: Overview of Configuring an External Learning Request (SF-182) Process [page 991]

Related Information

Adding Approved Training Vendors [page 993]
Adding Training Types [page 994]
Adding Delivery Types for External Learning [page 995]
Adding Learning Designation Types [page 996]
Adding Learning Training Credit Types [page 997]
Adding Learning Training Sources [page 998]
Adding Learning Training Purposes [page 999]
Modifying External Learning Request (SF-182) Forms [page 1000]
Submitting External Learning Requests (SF-182) in Bulk [page 1002]
Setting the Default Processes for External Learning Requests (SF-182) [page 1003]
Assigning External Learning Request (U.S. Federal SF-182 Training Request Form) Processes to Users [page 1005]
Troubleshooting External Learning Requests (SF-182) [page 1006]
External Learning Request (SF-182) Approval Process [page 1008]

23.3.4.6.14.1 Configuring an Attachment (SF-182)

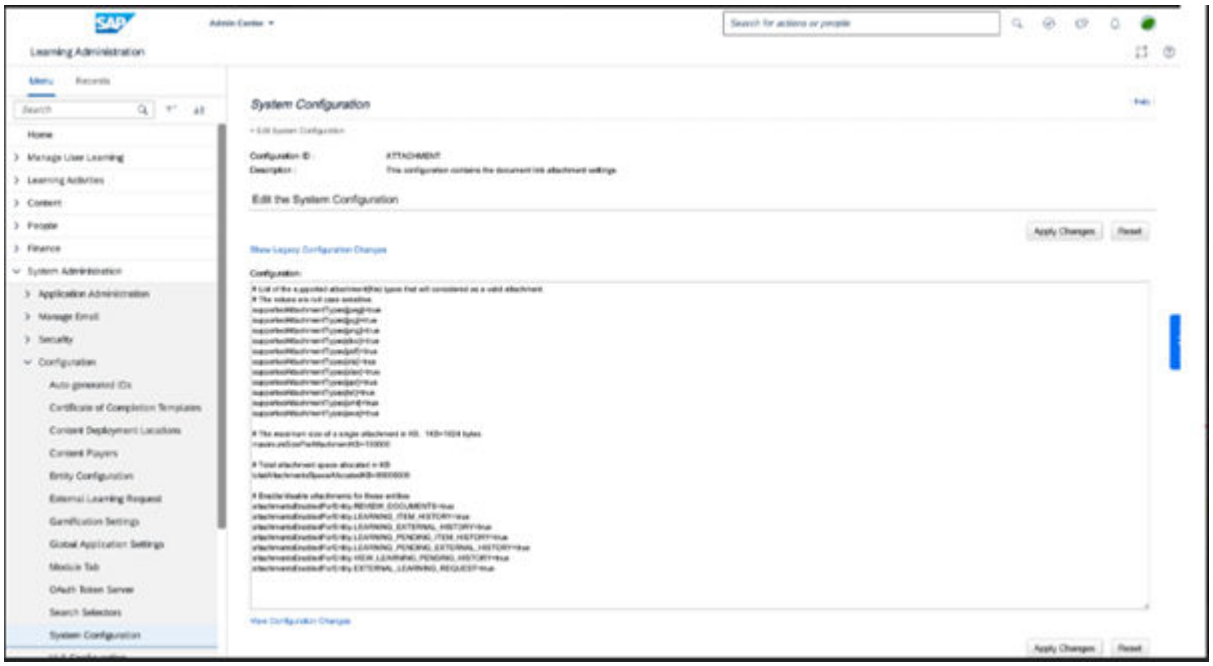
Find out how to configure attachments in External Learning Request and Verification in SF-182 form.

Context

Find out how to enable *Single Attachment* and *Multiple Attachments* to start using this feature in External Learning Request and Verification.

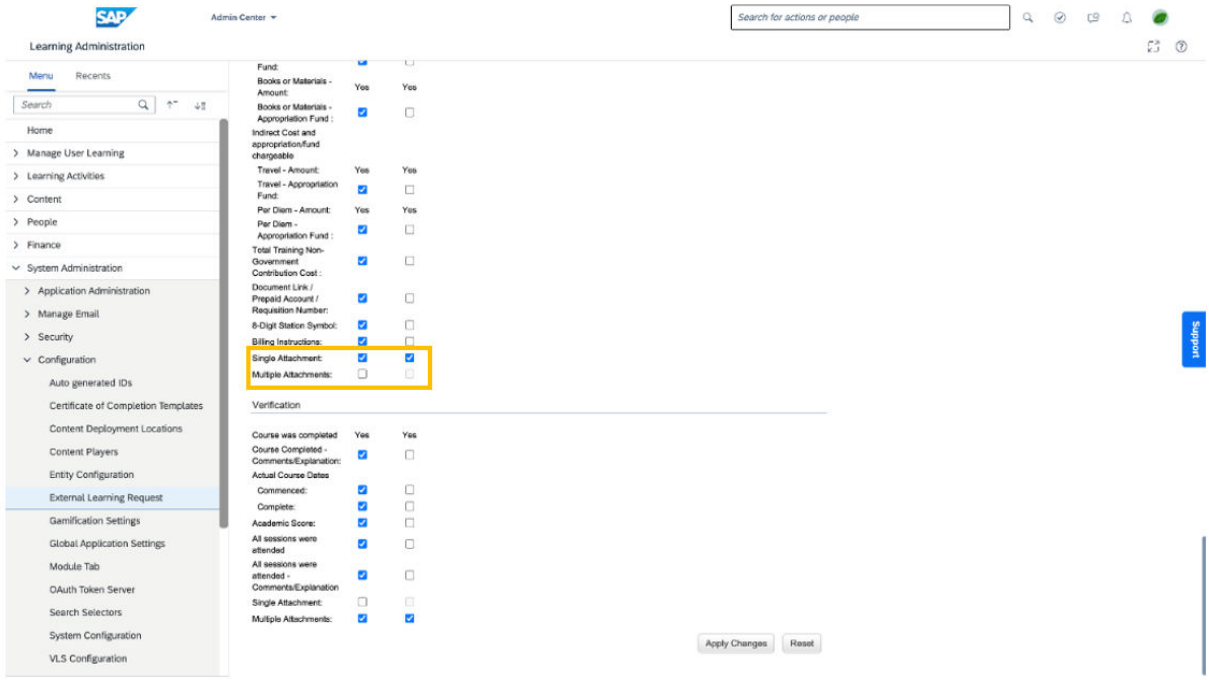
Procedure

1. Go to *Learning Administration*, and then go to *System Administration* > *Configuration* > *System Configuration* > *Attachments* > External Learning Request as true. If you set the entity value as true, the attachment option will be available in both Learning and Verification sections. If the entity value is set as false, the attachment option will not be available in the Learning and Verification sections.

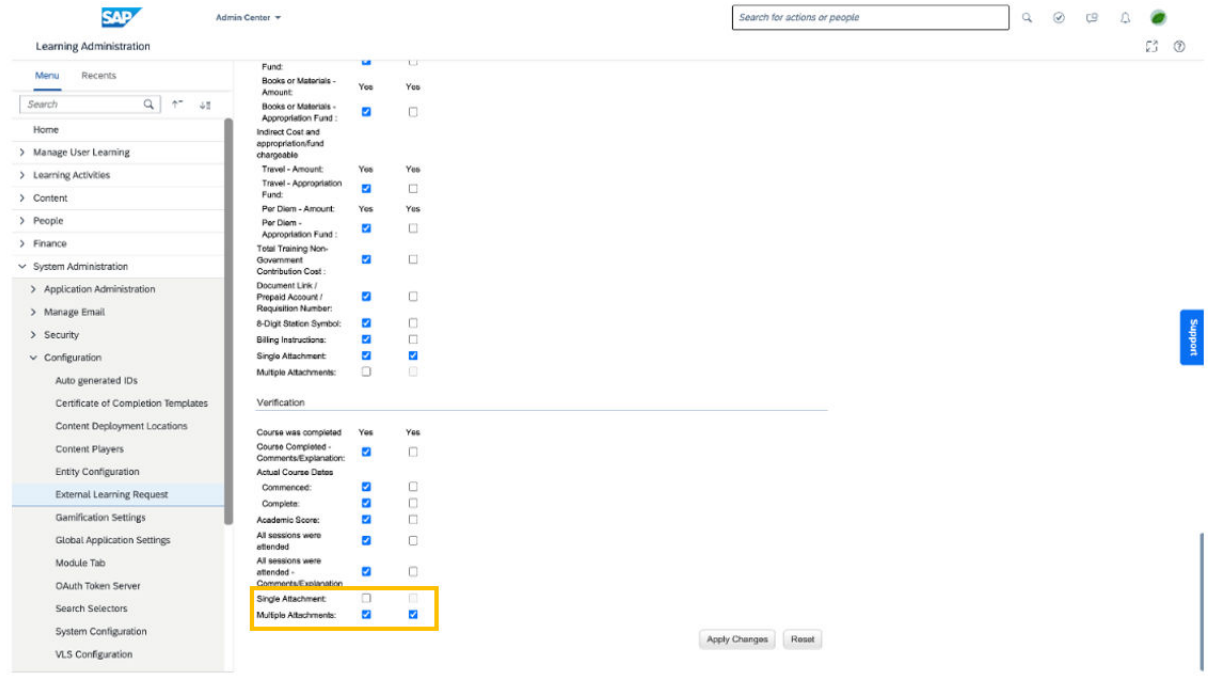


2. You can now enable *Single Attachment* and *Multiple Attachments* based on your needs in *Request* section. Go to *Learning Administration*, and then go to *System Administration* > *Configuration* > *External Learning*

Request > *SECTION C: COSTS AND BILLING INFORMATION* >.



3. You can now enable *Single Attachment* and *Multiple Attachments* based on your needs in *Verification* section. Go to*Learning Administration*, and then go to *System Administration* > *Configuration* > *External Learning Request* > *Verification* >.



The *Single Attachment* and *Multiple Attachments* in External Learning Request and Verification cannot be enabled at the same time.

> **Note**
>
> Whenever the administrator changes the configuration, the configuration changes will be applied only to newly created requests.

23.3.4.7 Assigning E-Signatures Approval Processes to Completion Statuses

Add e-signature approval processes if you your courses lead to compliance through a regulator who audits your system and you need secondary identity verification.

Prerequisites

Enable electronic signatures (e-signatures) in *System Admin* > *Configuration* > *Global Variables*.

Context

When learners earn a completion status, you can use an e-signature approval process to verify that they earned the completion status. The e-signature approval process is like other approval processes, but approvers are asked for a PIN to verify their identity.

> **Note**
>
> When the actions are triggered by the system, such as through an APM or connector, the PIN will not be requested.

Procedure

1. Go to Learning Administration and then go to *References* > *Manage Users Learning* > *Completion Status*.
2. Open each completion status that requires additional identity verification.

   Although your completion system is unique to your company, most compliance customers, have completion status values that triggers an e-signature approval process. For example, you can have a completion status called "Pass Not for Certification" and "Pass For Certification." Pass for Certification might trigger the e-signature because you use it for regulated learning. But if a learner wanted to take a course **not** required for regulation, you might use Pass Not for Certification. Pass Not for Certification would not use e-signatures.
3. Select *Enable electronic signature*.
4. To change the approval process, select it in *Approval Process*.

You set the default approval process for e-signatures in *System Admin* > *Configuration* > *Global Variables*.

5. Click *Apply Changes*.

Enabling Electronic Signatures (E-Signatures) [page 1013]
Enable e-signatures if you need a secondary form of identity management for Learning actions. E-signatures are common for customers who have a learning compliance practice.

Setting Default E-Signatures Approval Process Behavior [page 1015]
Set the default e-signature approval process so that when other administrators create completion statuses that require an e-signature and approval, the completion status is defaulted to your selected approval process.

Adding E-Signature Meaning Codes [page 1016]
Add e-signature meaning codes to provide a list of reasons why a person is entering their secondary user identification (e-signature).

Adding E-Signature Help [page 1017]
E-signatures can be confusing for users, so you can add default meaning codes and help messages for users.

Resetting an E-Signature PIN [page 1018]
Reset an e-signature PIN when a learner or manager forgets it and you have e-signatures enabled.

E-Signatures [page 1019]
E-signatures support complex training verification for a small set of customers who require secondary identity management for learning compliance scenarios.

E-Signature Meaning Codes [page 1020]
E-Signature meaning codes identify the reason that a person is entering their secondary user identification (e-signature).

How SAP SuccessFactors Learning Uses E-Signatures [page 1021]
Use e-signatures to provide a secondary identity verification if you are overseen by a regulatory organization.

23.3.4.7.1 Enabling Electronic Signatures (E-Signatures)

Enable e-signatures if you need a secondary form of identity management for Learning actions. E-signatures are common for customers who have a learning compliance practice.

Context

You can edit electronic signature settings in SAP SuccessFactors Learning Administration by going to *System Administration* > *Configuration* > *Global Applications Settings*.

Select *Enable electronic signatures* to enable these controls.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Configuration* > *Global Applications Settings*.
2. Select *Enable electronic signatures*.
3. In *Default electronic signature setting for new*, select which objects by default, have an e-signature approval process.

Choice	Description
Item	If you select *Item*, then every new course (learning item) that you create has its *Enable electronic signature* checkbox selected by default.
Completion Status	If you select *Completion Status*, then every new completion status you create has its *Enable electronic signature* checkbox selected by default.
Completion Status additional Approval Process ID	In *Completion Status additional Approval Process ID*, set the default e-signature approval process for all new completion statuses.
Curriculum	If you select *Curriculum*, then every new curriculum that you create has its *Enable electronic signature* checkbox selected by default.
Competency	Because you import competencies from Job Profile Builder, this option is out-dated.

4. Click *Apply Changes*.

Task overview: Assigning E-Signatures Approval Processes to Completion Statuses [page 1012]

Related Information

Setting Default E-Signatures Approval Process Behavior [page 1015]
Adding E-Signature Meaning Codes [page 1016]
Adding E-Signature Help [page 1017]
Resetting an E-Signature PIN [page 1018]
E-Signatures [page 1019]
E-Signature Meaning Codes [page 1020]
How SAP SuccessFactors Learning Uses E-Signatures [page 1021]

23.3.4.7.2 Setting Default E-Signatures Approval Process Behavior

Set the default e-signature approval process so that when other administrators create completion statuses that require an e-signature and approval, the completion status is defaulted to your selected approval process.

Prerequisites

Create the approval processes for your e-signatures.

Although it isn't required for this process, you should also create e-signature meaning codes before you set the default approval processes.

Context

You can set a primary approval process for a completion status, but you can also set secondary processes.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Configuration* > *Global Application Settings*.
2. In *Completion Status additional Approval Process ID*, select the default approval process for new completion statuses.
3. Set *Enable electronic signatures for External Events*.
   - If you select *Enable electronic signatures for External Events*, when users run the record learning event wizards, they must enter their PIN for external events. External events are courses that a user completed that aren't tracked as courses in Learning.
   - If you clear *Enable electronic signatures for External Events*, Learning automatically verifies all unverified external learning events that require PIN.

   > **Note**
   >
   > If you select *Enable electronic signatures for External Events*, select a default process for external events in *External Event additional Approval Process ID*.
4. Set *Skip Additional Approval Process steps that do not have approvers*.
   - Select *Skip Additional Approval Process steps that do not have approvers* to skip any approval steps that require an additional approval process if those steps don't have approvers. For example, when you record a learning event, the system checks the learning record to see if the instructor has an associated user ID. If the instructor does **not** have an associated user ID, then the system automatically approves the step and skips to the next one.

- Clear *Skip Additional Approval Process steps that do not have approvers* to prevent any user from completing the e-signature process if approvers are missing from the approval process. Learners contact administrators to resolve the issue.

Task overview: Assigning E-Signatures Approval Processes to Completion Statuses [page 1012]

Related Information

Enabling Electronic Signatures (E-Signatures) [page 1013]
Adding E-Signature Meaning Codes [page 1016]
Adding E-Signature Help [page 1017]
Resetting an E-Signature PIN [page 1018]
E-Signatures [page 1019]
E-Signature Meaning Codes [page 1020]
How SAP SuccessFactors Learning Uses E-Signatures [page 1021]

23.3.4.7.3 Adding E-Signature Meaning Codes

Add e-signature meaning codes to provide a list of reasons why a person is entering their secondary user identification (e-signature).

Context

Some customers of SAP SuccessFactors Learning require secondary identity verification for some actions, like posting learning outcomes to records management. This secondary identification is called an e-signature. If you're one of these customers, then you create a list of meaning codes that users must choose from when they enter their e-signatures.

> **Note**
>
> You typically create a list of e-signature meaning codes when you first implement, and then review them on a schedule (for example, annually).

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Manage Users Learning* > *E-signature Meaning Codes*.
2. To see the current list of meaning codes, click *Search*.

3. To add a new meaning code to the list, click *Add New*
4. In *Meaning Code ID*, type a unique ID for the meaning code.
5. In *Description*, type a description that helps users (for example, managers), choose the correct meaning code.

   Meaning code descriptions can be translated into any language you enable for SAP SuccessFactors Learning, but at this step, enter it in the default language.
6. Choose *Add*.
7. After SAP SuccessFactors Learning saves the meaning code, you can click the *Open localization pop up* icon to translate the description.

Next Steps

Review or set default e-signature meaning codes in *System Administration* > *Configuration* > *Global Application Settings*.

Task overview: Assigning E-Signatures Approval Processes to Completion Statuses [page 1012]

Related Information

Enabling Electronic Signatures (E-Signatures) [page 1013]
Setting Default E-Signatures Approval Process Behavior [page 1015]
Adding E-Signature Help [page 1017]
Resetting an E-Signature PIN [page 1018]
E-Signatures [page 1019]
E-Signature Meaning Codes [page 1020]
How SAP SuccessFactors Learning Uses E-Signatures [page 1021]
Enabling Electronic Signatures (E-Signatures) [page 1013]

23.3.4.7.4 Adding E-Signature Help

E-signatures can be confusing for users, so you can add default meaning codes and help messages for users.

Prerequisites

Define e-signature meaning codes in *References* > *Manage User Learning* > *Esig Meaning Code*.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Configuration* > *Global Application Settings*.
2. Go to *Electronic Signature Settings*.
3. In *Administrator Default Esig Meaning Code* and *User Default Esig Meaning Code*, choose the default value in the meaning code list for administrators and users.

   When the Learning prompts administrators or users for their e-signature, the e-signature meaning code defaults to what you select for either the Administrator or User Default Meaning Code. Select the most common meaning code to help users and administrators.
4. In *Administrator Esig Message*, *User Esig Message*, and *Instructor E-Signature Message* type a message to help administrators, learners, and instructors understand how to use e-signatures.

   > ⓘ Note
   >
   > Localize the message into native languages if your users speak more than one language.

Task overview: Assigning E-Signatures Approval Processes to Completion Statuses [page 1012]

Related Information

Enabling Electronic Signatures (E-Signatures) [page 1013]
Setting Default E-Signatures Approval Process Behavior [page 1015]
Adding E-Signature Meaning Codes [page 1016]
Resetting an E-Signature PIN [page 1018]
E-Signatures [page 1019]
E-Signature Meaning Codes [page 1020]
How SAP SuccessFactors Learning Uses E-Signatures [page 1021]

23.3.4.7.5 Resetting an E-Signature PIN

Reset an e-signature PIN when a learner or manager forgets it and you have e-signatures enabled.

Context

> ⓘ Note
>
> Most customers do **not** use e-signatures as a secondary form of identity verification.

Reset a Personal Identification Number (PIN) when people forget their current PIN and you have followed your organization's policy for verifying the person's identity.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user whose PIN you must reset.
3. In *Actions*, click *Reset E-Signature PIN*

Results

After you reset a PIN, the next time the associated users log in to the user interface, they are prompted to create a new PIN. The PIN they create is subject to your e-signature policy.

Task overview: Assigning E-Signatures Approval Processes to Completion Statuses [page 1012]

Related Information

Enabling Electronic Signatures (E-Signatures) [page 1013]
Setting Default E-Signatures Approval Process Behavior [page 1015]
Adding E-Signature Meaning Codes [page 1016]
Adding E-Signature Help [page 1017]
E-Signatures [page 1019]
E-Signature Meaning Codes [page 1020]
How SAP SuccessFactors Learning Uses E-Signatures [page 1021]

23.3.4.7.6 E-Signatures

E-signatures support complex training verification for a small set of customers who require secondary identity management for learning compliance scenarios.

When identifying unique users, Learning behaves like the rest of SAP SuccessFactors for most customers. Each user has a unique user ID and password. Users' ID and password are managed in Platform, which handles Single Sign-On (SSO) and identity management.

Some customers require a more rigorous training verification process: a series of approvers, often an instructor, a manager, and a training coordinator must verify that a user has completed a course. At each point in the series, the approver must verify his or her identity and that verification is more strict than user ID and password. E-signatures support this strict standard. For example, e-signatures support FDA regulation CFR 21 Part 11. At each important

step when learning completions are posted to records management or when approved for posting, users must enter their e-signature as a secondary identity verification.

> **Note**
>
> Please consult your compliance office to understand how e-signatures and secondary identity management apply to your different jurisdictions and different compliance regulators. E-signatures are disabled by default.

E-signatures (also known as a PIN) are special codes known only to the user. The administrators can't enter an e-signature. Instead, each individual user can reset the e-signature in *People* > *Users* > *Actions*. When enabled, all users (administrators, learners, instructors, and managers) must type their e-signature when they approve learning, for example or when they post a course completion status for themselves or another learner. They don't need to type an e-signature for all actions. Just those that are required for learning compliance.

Parent topic: Assigning E-Signatures Approval Processes to Completion Statuses [page 1012]

Related Information

Enabling Electronic Signatures (E-Signatures) [page 1013]
Setting Default E-Signatures Approval Process Behavior [page 1015]
Adding E-Signature Meaning Codes [page 1016]
Adding E-Signature Help [page 1017]
Resetting an E-Signature PIN [page 1018]
E-Signature Meaning Codes [page 1020]
How SAP SuccessFactors Learning Uses E-Signatures [page 1021]
Enabling Electronic Signatures (E-Signatures) [page 1013]

23.3.4.7.7 E-Signature Meaning Codes

E-Signature meaning codes identify the reason that a person is entering their secondary user identification (e-signature).

If you work in a regulated industry, you might use electronic signatures (e-signatures). E-Signatures verify that users are who they say they are. E-Signature **meaning codes** describe why users or administrators are typing their e-signatures. For example, you might create e-signature meaning codes for adding, updating, and deleting learning events. When users enter their e-signatures, they select one of the meaning codes that you provide.

Parent topic: Assigning E-Signatures Approval Processes to Completion Statuses [page 1012]

Related Information

Enabling Electronic Signatures (E-Signatures) [page 1013]

Setting Default E-Signatures Approval Process Behavior [page 1015]
Adding E-Signature Meaning Codes [page 1016]
Adding E-Signature Help [page 1017]
Resetting an E-Signature PIN [page 1018]
E-Signatures [page 1019]
How SAP SuccessFactors Learning Uses E-Signatures [page 1021]
Enabling Electronic Signatures (E-Signatures) [page 1013]

23.3.4.7.8 How SAP SuccessFactors Learning Uses E-Signatures

Use e-signatures to provide a secondary identity verification if you are overseen by a regulatory organization.

E-Signatures are part of a system that ensures user uniqueness in SAP SuccessFactors Learning. They are a secondary form of identification most often used by companies that must meet compliance from an oversight body. For example, U.S. drug manufacturers are overseen by the Food and Drug Administration (FDA) in the U.S. Federal Government. If you are **not** overseen by a compliance organization, then chances are that you do not use e-signatures.

When any user posts a learning completion status, if that completion status requires e-signature approval, then SAP SuccessFactors Learning starts an approval process that requires e-signatures. For example, imagine that an administrator records a learning event for users and two things are true:

- The learning event has electronic signatures enabled (for example, the user completed a learning item, and *Learning Activities* > *Items* > *Item Details* > *Require E-Signature* is set to *Yes*.
- The completion status requires an e-signature and it has a defined approval process.

In this case, the administrator is asked to provide an e-signature. If the approval process also requires the e-signature of a manager, that manager also provides his or her e-signature, and so on through a process that you define. At each stage in the process, the users must enter e-signature meaning codes to define their actions.

Parent topic: Assigning E-Signatures Approval Processes to Completion Statuses [page 1012]

Related Information

Enabling Electronic Signatures (E-Signatures) [page 1013]
Setting Default E-Signatures Approval Process Behavior [page 1015]
Adding E-Signature Meaning Codes [page 1016]
Adding E-Signature Help [page 1017]
Resetting an E-Signature PIN [page 1018]
E-Signatures [page 1019]
E-Signature Meaning Codes [page 1020]
Assigning E-Signatures Approval Processes to Completion Statuses [page 1012]
E-Signature Meaning Codes [page 1020]

23.3.4.8 Troubleshooting Learning Approvals

Troubleshoot Learning approvals if an approval is blocked, which can prevent users from enrolling in a course, for example.

Context

Some Learning processes can require an approval process. Without approval, the process is blocked. To remove the blocked process, you can troubleshoot the problem for the learner and clear the block.

> **Note**
>
> In most cases, an approver has not granted or denied approval in a timely manner. For example, an approver might be on leave. You can approve or deny approvals on behalf of the approver.

Procedure

1. Go to Learning Administration, and then go to *People* > *Users* > *People* > *Users*.
2. Find and open the learner who has the blocked approval process and then go to *Approvals*.
3. Use the table to find the correct approval process and diagnose the problem with the process.
4. To approve or deny the approval on behalf of the approver, click the approval ID and then select either *Approve* or *Deny*.
5. Type comments for the approval in *Comments*.

   In almost all cases, you should add a comment because you are approving on behalf of another person. Write the reason that you are approving on behalf of the other person. For example, type **`The approver was on leave but the learner has an email from the approver that talks about enrolling into the course.`**
6. Click *Apply Changes*.

   > **Note**
   >
   > If you have enabled e-signatures for secondary identity verification, you are prompted for it.

23.3.4.9 Breaking the Approval Inheritance from Item to Class

If you don't want the class to inherit its approval process configuration from the default configuration of the course (learning item), you can break the inheritance.

Procedure

1. Go to *Learning Activities* > *Classes*, search for the class that you want to break inheritance for, and then open it.
2. On the *Item Details* tab, adjust the configuration as follows:
   - If you want to turn on or turn off the enrollment approval, find *Approval Required* and set it.
   - If you want to turn on or turn off the withdrawal approval, find *Approval required to withdraw* and set it.
   - If you want to change the approval process required for enrollment, find *Approval Process* and set it.
   - If you want to change the approval process for withdrawing, find *Withdraw Approval Process* and set it.
3. Choose *Save*.

Related Information

Setting an Approval Process for Enrolling into a Course [page 951]
Setting an Approval Process for Withdrawing from Courses [page 951]

23.3.4.10 Approving Learning Financial Transactions

ApproveLearning financial transactions to mark them for posting to your financial system.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Finance* > *Financial Transactions*.
2. Find financial transactions in the *Non-Approved* or *Both* status.

   > → Tip
   >
   > If you don't see the financial transactions search filter, click *Add/Remove Criteria*.

3. Look at the transactions and decide which transactions you want to approve.

   Approved transactions can be fetched by your external financial system. The external financial system fetches them through SAP SuccessFactors Learning web services. Even if you don't have an external financial system, approval is still useful for your records.

4. For the transactions that you want to approve, select the *Approve* check box.

   > → Tip
   >
   > To approve all in a page, select the check box in the heading of the *Approve* column.

5. Click *Save*.

23.3.4.10.1 Fixing and Reposting Financial Transactions

Fix and repost financial transactions when your external financial system rejects the transaction.

Prerequisites

To repost financial transactions, you must be posting them to an external financial system. You must also have the security permission: Manage Financial Transactions Posting.

Context

If you post financial transactions to an external system, SAP SuccessFactors Learning makes all approved transactions available. Your financial controllers, however, might view a transaction that posted to the financial system and reject it. If the transaction is rejected, it returns to *Learning Administration* > *Finance* > *Financial Transactions* with a failed or rejected status and a reason for the rejection. For example: “invalid account code”.

> ⓘ Note
>
> Both the exact status and the reason differ depending on your external financial system and company policy.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Finance* > *Financial Transactions*.
2. Use the search criteria to narrow the list of financial transactions.

   > → Tip
   >
   > Look for approved financial transactions over a recent time frame.

3. Look in the *Posting Status* column for FAILED.

   > → Remember
   >
   > The status FAILED is common, but the exact text depends on your financial system. For example, your financial system might use the phrase REJECTED instead. We represent the exact string that your financial

system sends us because it has a specific meaning in your business case, but this means that these instructions can't know the exact text.

4. Look in the same column for the reason that the failed transaction was rejected, and then investigate and fix the transaction.
5. After you fix the transaction, go back to *Finance* > *Financial Transactions*, find the transaction, select *Retry*, and then click *Save*.

Next Steps

When you select *Retry* and save, SAP SuccessFactors Learning marks the transaction for retry the next time the financial system fetches the transactions. Depending on how you built your client to get the transactions, there could be a delay between marking the transaction for retry and the client getting the transaction.

Related Information

Approving Learning Financial Transactions [page 1023]

23.3.4.10.2 Learning Financial Transaction Fields

If you're approving or troubleshooting financial transactions for Learning in SAP SuccessFactors, the financial transaction fields help you identify individual transactions.

Field	Description
ID	Unique identifier of the transaction.
Transaction Type	The type of transaction for the line item: Ad hoc Refund the Charge, Ad hoc Refund the Refund, Adjust Charge, Adjust Refund, Cancel Refund, Chargeback - Realized Cost, Credit Card Pending, REGISTER, or PURCHASE. Refer to Learning Transaction Types [page 1026] for details on how these transaction types are applied.
Item/Material	The Type, ID, and Revision Date and Time of the item/material. The Schedule ID also appears with its Date and Time.
Order Information	The Shopping Account ID, Order ID, and Date and Time the order was placed.
Total Price	The price per item/material.
Account Codes	The Cost and Profit centers associated with the corresponding item/material. Click the *View Details* link to view the details of the Account Code.

Field	Description
Approve	Select to mark a line item for approval. Approved financial transactions are available to a client that gets financial transactions for an outside financial system.
Posting Status	The status of the transaction related to an external financial system. Although the exact status can differ depending on your external financial system, a status of FAILED is common. It tells you that something was wrong with your transaction (a bad amount or bad account code, for example). The financial system can provide an explanation under the status. Use the explanation, if provided, to troubleshoot the transaction.
Retry	Select *Retry* after you have fixed failed transactions and you want to queue the transaction for reposting to the financial system.

23.3.4.10.3 Learning Transaction Types

SAP SuccessFactors Learning applies transaction types to financial transactions, based on the type of user and the action performed.

In the following table, an 'External User' is defined as a user with a *Shopping Account Type* of **`External`** and an 'Internal User' is defined as a user with a *Shopping Account Type* of **`Internal`**.

This transaction type...	...is applied when this type of user...	...performs this action
Ad hoc Refund the Charge	Administrator	Removes a previously issued refund, either at the line item or the order level.
Ad hoc Refund the Refund	Administrator	Issues a line item or an order-level refund.
Adjust Charge	Administrator	Changes a seat reservation order. This also creates a transaction for a new charge.
Adjust Charge	Administrator	Changes the final unit price on the order page or changes the price on *Registration Financial Details* tab for a class. This also creates transaction for new charge.
Adjust Charge	Administrator	Saves split costs, creating a transaction for the new charge.
Adjust Refund	Administrator	Changes a seat reservation order. This reverses the original REGISTER charge.
Adjust Refund	Administrator	Changes the final unit price on the order page. This reverses the original REGISTER charge.
Adjust Refund	Administrator	Saves split costs, reversing the previous charge transaction.
Cancel Refund	Administrator	Cancels a class or removes a user from a class on the *Registrations* tab for a class.
Chargeback - Realized Cost	Administrator	Closes a class with delivery costs.
PURCHASE	Administrator	Adds a financial transaction from a learning history record.
REGISTER	Administrator	Registers a user for a class on the *Registrations* tab for a class.

This transaction type...	...is applied when this type of user...	...performs this action
REGISTER	Administrator	Purchases a reserved seat for an organization or group on the *Seat Reservations* tab for a class.
Cancel Refund	External User	Withdraws from a class.
Credit Card Pending	External User	Purchases a seat in a class with a credit card and is on the waitlist.
PURCHASE	External User	Purchases an online item.
PURCHASE	External User	Purchases a seat in a class.
PURCHASE	External User	Purchases a seat in class with online content.
PURCHASE	External User	Purchases the online option of a course that is offered as instructor-led or online.
PURCHASE	External User	Purchases other item.
Cancel Refund	Internal User	Withdraws from a class.
PURCHASE	Internal User	Purchases an online item.
PURCHASE	Internal User	Purchases the online option of a course that is offered as instructor-led or online.
PURCHASE	Internal User	Purchases other item.
REGISTER	Internal User	Registers for a seat in class.
REGISTER	Internal User	Registers for a seat in class with online content.

23.3.4.11 Creating an Assignment Profile

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

Prerequisites

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

Context

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

Procedure

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

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

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

5. Choose *Save*.

23.3.4.12 Translating Strings in Learning

Translate parts of Learning if your users speak many languages.

Prerequisites

To translate into a language, enable the locale of the language in *References* > *Manage Labels* > *Locales*.

Context

In Learning, you can translate any text that has a *Translate* button. For example, you can translate course titles so that learners can read the titles in their own languages. Not all text is translatable.

Procedure

1. Click *Translate*.
2. Add the translation of the text next to the language you're translating into.
3. Click *Finish* or *Apply Changes*.

Results

The system automatically creates a new label for the locales that you've provided a value for.

After you add a translated value, the system propagates that value throughout all of the application so that you can search for the records using the translated value. Learners can search the using translated values. For example, they can search for courses and Learning looks in translated titles for results.

> **Note**
>
> Learning doesn't create a new label ID when you edit an existing translation. It uses the existing label ID and overwrites the label value.

23.3.4.13 Approval Process and Close Dates

After specific dates, approval requests expire. When there are expired approval requests for registration or withdrawal, you can hide them from approvers.

An approval request expires when:

- The date in *Registration Close Date* has passed for a registration request.
- The date in *Registration Close Date* is blank and the class's *Start Date* has passed for a registration request.
- The date in *Last Date to Withdraw* has passed for a withdrawal request.
- The date in *Last Date to Withdraw* is blank and the class's *End Date* has passed for a withdrawal request.

You can hide expired approval requests from approvers. Go to *System Administration* > *Application Administration* > *Registration Settings* and select *Hide pending approval requests after registration closes or withdrawal date passes*. If the checkbox **isn't** selected, pending approval requests are hidden as follows:

- Registration requests are automatically hidden from approvers after the class's *Start Date* passes.
- Withdrawal requests are automatically hidden from approvers after the class's *End Date* passes.

While you can hide expired approval requests from approvers, they aren't removed until the *Deny Expired Approval Processes* automatic process runs. When users look up the expired approval requests, they see them in a pending status until the *Deny Expired Approval Processes* automatic process runs.

For both registration and withdrawal approval requests, you can see the expired approval requests in the approval status report. As an administrator, you can bypass approval and add the user to the class from the *Learning Activities* > *Classes* > *Class* > *Registrations* tab.

Related Information

Scheduling the Deny Expired Approval Processes [page 1257]

23.3.4.14 How Users Become SAP SuccessFactors Learning Approvers

As a SAP SuccessFactors Learning administrator, when you understand how users become approvers, you can design better approval processes.

When a user action initiates an approval process in SAP SuccessFactors Learning, the first step is communication to the approvers. For example, when a user submits a training request for a class that requires approval, the system initiates the approval process and sends e-mail notifications to the user and all related approvers. A user becomes an approver under **all** of the following conditions:

- When an approver and his or her approval role is associated with the approval process.
- When another user requests an item or class that requires approval and when that item or class is associated with the approval process.
- When an approver and his or her approval role is associated with the same control domain or organization that is assigned to the user.
  - You can control whether you want to associate approval roles with domains or organizations by selecting Domains or Organizations in the Approval Process Settings module (*System Administration* > *Configuration* > *Global Applications Settings*).
  - You can associate control domains to approval roles when you assign approval roles to a user's record (*People* > *Users* > *Approval Roles*).

Related Information

Learning Approval Process Global Application Settings [page 946]

23.3.5 Enabling Content Object Level Auditing in SAP SuccessFactors Learning

Enable content object level tracking if you need to report on the time that users spend on individual online learning content objects.

Context

A few customers must report, in detail, users' time spent in online learning. For example, some customers must, by law, audit their users' time spent in online content. If you must create detailed reports for users' time in online learning, you can enable the detailed audit trail.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *LMS_ADMIN*.
3. Find `enableContentObjectAuditTrail` and set it to `true`.
4. Click *Apply Changes*.
5. Go to *System Admin* > *Configuration* > *Record Configuration*
6. In *Select a record to configure*, select *Item*.
7. Add *Enable Content Object Audit* from *Available* to *Display*.

   > **Note**
   >
   > The *Enable Content Object Audit* field might be added to *Display* already.

8. Click *Save*.

Next Steps

You can now go to each individual learning item of type blended or online and enable the content object auditing. The type must be blended or online because only those types of learning items have online content. By default, detailed auditing is disabled on learning items.

23.3.5.1 Table for Detailed SAP SuccessFactors Learning Content Reporting

If you enable detail content reporting for users, you can write custom reports that look at the detailed content reporting table and return time boundaries of users experiencing content.

When you set `enableContentObjectAuditTrail` in *LMS_ADMIN* to `true`, SAP SuccessFactors Learning begins writing content audit information to `PA_CBT_STUD_CPNT_MOD_AUDIT`.

In `PA_CBT_STUD_CPNT_MOD_AUDIT`, you can use `LAST_ACCESS` and `LAST_UPD_TSTMP` to bracket time.

23.3.6 Pushing Offline Player to Users' Workstations

Administrators can download the offline player executable and give it to their IT organizations to push it out to the computers of end users.

Prerequisites

These instructions apply to installations that prevent users from downloading offline player. To see if your installation prevents downloads, go to *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*, and check the value of `offlinePlayerUpgradeEnabled`. If it's set to `false`, you prevent users from downloading offline player.

To run the offline player installer, you need a Java Runtime Environment (JRE).

Context

If you work at a company that has strict control over what users can install on their workstations, and if you want to use offline player, then you must push offline player to their workstations. Follow these instructions to get an installation version that you can give to your Information Technology (IT) team to be included in users' images.

Procedure

1. Go to *System Administration* > *System Management Tools* > *Offline Player Installer*.
2. For Apple Macintosh and Microsoft Windows, click the *Download* link to download the installer.

   > **Note**
   >
   > You download the installer **without** its file extension. Add `.exe` for the Windows installer and `.dmg` for the Mac installer.

3. If you have a proxy server, we recommend that you or someone in your IT organization create a .varfile file to contain the proxy server settings for users.
4. Send the installers and the .varfile to your IT organization to push to users' workstations.

   IT organizations use different tools to administer applications on users' workstations, but your organization needs to start with the executable and the .varfile.

23.3.6.1 Offline Player with Proxy Servers

Users can download and use offline player in this way when your network includes a proxy server.

Offline player is a program that allows users to download learning content to their workstations, view the content, and then sync their progress back to the Learning Management System (LMS). The communication between

offline player and the LMS occurs through a network connection. When the network has a proxy server, offline player checks for the proxy server settings in the following order, starting at the top of the list:

1. Java system properties
2. Browser settings including Proxy Auto Configuration (PAC)
3. Environment variables
4. Desktop settings

The configuration property `offlinePlayerUpgradeEnabled` has an effect on this list. You set `offlinePlayerUpgradeEnabled` in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*. When set to **`true`**, users can download the offline player installer from the LMS web servers. When set to **`false`**, an IT administrator must push the executable out to users. They can't download it directly from the LMS.

When you set `offlinePlayerUpgradeEnabled` to **`true`**, offline player never gets its proxy settings from the Java system properties. Instead, it usually gets the proxy configuration from the browser settings.

When you set `offlinePlayerUpgradeEnabled` to **`false`**, you probably work in an environment that has greater control over users' workstations. If you do work in an environment that has greater control over users' workstations, we recommend that you specify the proxy server at the Java system properties level. You do that with a .varfile file that you save to the same folder as the .exe file (or .dmg file for Macintosh). When you push offline player to your employees' workstations, the installer picks up the proxy information from the .varfile file.

23.3.6.2 Translating or Branding Offline Player

To alter offline player in any way (for example, to brand it or translate it), you must extract the installation executable, change the application, repackage the executable, and then push the application to users.

Internationalization

To render the user interface of the Offline Player in another language, you must create a new package for each language that you want to provide. To do so, you must extract the files, change the labels, repackage the offline player, and then redistribute that package to the users who need it.

Branding

To brand the offline player, you must extract the files, brand the application, repackage the files, and then redistribute that package to the users.

23.3.6.3 Creating a .varfile for Proxy Server Settings

In SAP SuccessFactors Learning offline player, the main use of a .varfile is to add proxy server settings.

Procedure

1. If you have not already done so, download the offline player installers.
2. Create a .varfile in the same folder where you downloaded or saved the installers and name it the same as the installer executable.

   If your installer executable is named `Learning_OfflinePlayer.exe`, then your .varfile must be named `Learning_OfflinePlayer.varfile`. It must also remain in the same folder as the .exe file when the IT administrator pushes offline player to users.
3. In the .varfile, add a `proxyDetails` property and add Java system properties for your proxy server.

   Example for HTTP:

   Sample Code

   ```
   proxyDetails=-Dhttp.proxyHost=<host> -Dhttp.proxyPort=<port>
   ```

   Example for HTTPS (line breaks inserted for formatting):

   Sample Code

   ```
   proxyDetails=-Dhttp.proxyHost=<host> -Dhttp.proxyPort=<port>
   -Dhttps.proxyHost=<host> -Dhttps.proxyPort=<port>
   ```
4. Save the .varfile and and the installers' executable files in the same folder and push offline player to users' workstations.

23.3.7 Default Course Registration Settings

You can set default values for registration settings. When you create any new class in your system, they inherit the values from your default settings.

You set default values for registration in Learning Administration: *System Administration* > *Application Administration* > *Registration Settings*.

Registration Setting	Description
Default Self Registration Setting for New Items	If you select this checkbox, then the system selects *User can Self-Register* on *Learning Activities* > *Items* > *Item Details* each time you add a new item.

Registration Setting	Description
Default Manager Registration Setting for New Items	If you select this checkbox, then the system selects *Manager can Register Others* on *Learning Activities* > *Items* > *Item Details* > each time you add a new item.
By Default Enable Withdrawal Reasons for a class	If you select *By Default Enable Withdrawal Reasons for a class*, then every new class that you create in the system has its *Require Withdrawal Reason* set to *Yes* (true). Every new class will require users or administrators to enter a withdrawal reason when they withdraw.
User can withdraw when class is assigned by a manager	If you select this checkbox. then the system selects*User can withdraw when class is assigned by a manager* on *Learning Activities* > *Classes* > *Class Details* > each time you create a new class. This is the global default setting that is inherited by each class and can be changed at the class level. When selected, users are permitted to withdraw from a class if their manager registered them for the class. **Note** While the setting label references *assigned by a manager*, it applies to classes for which they were registered, not assigned.
Apply Registration Cut-off to Automatically Add from Waitlist	If you select this checkbox, classes automatically add users up to the registration limit up until the registration cut-off date and time (based on the time zone of the class). If the checkbox is clear, the classes automatically add users until the start date and time of the classes. SAP SuccessFactors Learning uses time zones to show course start and end times in local time: the time **in the location** of learners when attending training. To calculate local time, Learning needs time zones for all applicable parts of the schedule and the user. To help you schedule, you should set the time zones too. For example, you set time zones for the facility where the course takes place, the time zone of the class, and the time zone of the user.

Registration Setting	Description
Hide pending approval requests after registration closes or withdrawal date passes	If you select this checkbox and there are approval requests pending for registration or withdrawal, the approval requests are hidden from approvers based on dates specified in the *Details* tab for a class (*Learning Activities* > *Classes* > *Class*). Approval requests are hidden when: • The date in *Registration Close Date* has passed for a registration request. • The date in *Registration Close Date* is blank and the class's *Start Date* has passed for a registration request. • The date in *Last Date to Withdraw* has passed for a withdrawal request. • The date in *Last Date to Withdraw* is blank and the class's *End Date* has passed for a withdrawal request. If the checkbox **isn't** selected, pending approval requests are hidden as follows: • Registration requests are automatically hidden from approvers after the class's *Start Date* passes. • Withdrawal requests are automatically hidden from approvers after the class's *End Date* passes.
Managers can override Item prerequisites	If you select this checkbox, managers can register users into learning items even when the user doesn't meet the prerequisites.
Managers can override Class maximum capacity	When this checkbox is selected and a manager registers a user into a class at full registration, the user will be enrolled and the class will exceed capacity. A user will be waitlisted for full class when *Managers can override Class maximum capacity* is **not** selected and waitlisting is enabled in the class registration settings.
Remove associated item from learning plan when admin withdraws user(s) from class(es)	If you select this checkbox, then when you withdraw a user from a class, the associated item is removed from the selected user's learning plan. Clearing the checkbox allows users to keep the item to request another class. For example, if a user can't attend one class but still needs the learning item.
Enforce Approval when Managers or HR Business Partner Registers/Withdraws Employee	If you select this checkbox, when a manager registers or withdraws a user from a class that has an approval process defined for registration or withdrawal, the approval process is triggered. If this checkbox is not selected, the approval process is ignored.
Email Confirmation Defaults for Administrator and User Actions	When you select a checkbox in this area, the system automatically selects the corresponding checkbox on the Registration tab each time you create a new class. You can override the default for each class.
Registration Statuses	Select the default registration status to be used throughout the application in the following circumstances. • Enrolled: Users are enrolled. • Waitlisted: Users are waitlisted (the class is too full and so users are put on a list to be added when another user withdraws). • Pending: Users will be registered pending approval. • Cancelled: When the class is canceled.

23.3.8 ATTACHMENT System Properties File

The settings in *ATTACHMENT* affect the attachment size and types of files that can be uploaded for the learning event recorder.

> **Note**
>
> In SAP SuccessFactors Learning, attachment limits are spread across three system configuration files: *ATTACHMENT*, *CONTENT IMPORT*, and *LMS_ADMIN*. You can edit all the files by going to: *System Administration* > *Configuration* > *System Configuration*.

Property	Description
`attachmentsEnabledForEntity.*`	The `attachmentsEnabledForEntity` enables attachments when you use the learning event recorder. The learning event recorder posts completion to SAP SuccessFactors Learning when users finish a class. You sometimes want to enable attachments so that your users can, for example, add a certificate of completion for a course that they took outside of Learning. • `LEARNING_ITEM_HISTORY` - Controls the upload process when users run the learning event recorder. • `LEARNING_EXTERNAL_HISTORY` - Controls the upload process when users run the learning event recorder and record an external learning event.
`supportedAttachmentTypes[*]`	Each `supportedAttachmentTypes` property contains a file extension in brackets. If their value is set to true, then they are the file extensions that users are allowed to upload when using the processes enabled by the `attachmentsEnabledForEntity.*` properties. If you set to false, then when users try to upload a file that has the extension, they see a warning and are prevented from continuing.
`maximumSizePerAttachmentKB`	The `maximumSizePerAttachmentKB` property value contains the maximum size that a single attachment can be, in KB. This applies to uploads for the learning event recorder tool. If a user exceeds the limit, they see an error and can't continue. The default setting is 800 KB. This applies to uploads for the learning event recorder tool. For emailed reports, if any report output attachment is larger than the allowable email server size (18 MB), the recipient receives email notification that the size exceeded the allowable limit. The report can be retrieved in the report jobs tab of the originating user.
`totalAttachmentSpaceAllocatedKB`	The `totalAttachmentsSpaceAllocatedKB` property value is the total amount of space (in KB) allowed in the database for attachments. Set it to a reasonable number to keep your database growth under control. The attachments space email notification (an Automatic Process: *System Administration* > *Automatic Processes* > *Exceeded Attachment Space Email Notification*) notifies an administrator when the size of the attachments in the database reaches a percentage of the total space allocated here.

Related Information

Configuring Attachment Logic and Limits in SAP SuccessFactors Learning [page 1041]

23.4 Learning Application Configuration

Learning application configuration includes how you set up the Learning system to run and keep it running with health checks and troubleshooting.

The Learning application has options for how you set it up independent of how users experience it. For example, you can import data or configure a data purge process. You typically configure the application during implementation and return to the configuration to help Learning run efficiently.

23.4.1 Generating an Admin Level System Client Secret for the SAP SuccessFactors Learning System

You generate a client secret from the SAP SuccessFactors Learning administration environment so that system-to-system web service client can obtain tokens.

Prerequisites

> **Note**
>
> You should discontinue using the SuccessFactors Learning token server and start using the more secure platform token server or openID connect authentication solution.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Security* > *Administrator Management*.
2. To generate a new client secret, you must either create a new administrator or select an existing administrator.
   - If you don't yet have an administrator to call Learning APIs, then you must create a new administrator by clicking *Add New*. Complete the *Add New Admin* form.
     A new administrator is now created.
   - If you have an existing administrator, you must select that administrator from the *Administrators* page.
3. Click *Generate a new Client Secret* to generate a new client secret.
   SAP SuccessFactors Learning generates a client secret, and its corresponding Hash Value.

> **Note**
>
> The client ID is the login name of the administrator account you created in the previous step. It is visible on the *OAuth Token Server* page alongside the newly generated secret. The client secret is the token generated when you use *Generate a new Client Secret.* These are two distinct values. When a subsequent configuration step asks you to concatenate the client ID and client secret, use the login name as the client ID and the copied secret as the client secret.

4. Copy the *Newly Generated Client Secret* value.

> **Note**
>
> The secret isn't stored, so if you lose it, you need to generate another. When you navigate away from OAuth Token Server page, the secret disappears from the page.
>
> If you generate a new client secret, you invalidate all previously generated ones. If you have clients that are using a previously generated secret to gain a token, you must update the client to use the new secret.

5. You can now share this value with the providers who can now make API calls to SAP SuccessFactors Learning specific to this administrator.

Next Steps

- The values on this page are the keys that open access to LMS web services. Transmit them securely according to your organization's security policy.
- The administrator-level client secret can be used only to generate the tokens for that particular administrator. In this way, we can control the accessibility of that particular administrator through the existing permissions.

Related Information

Authentication Using OAuth 2.0
Authentication Using OpenID Connect (OIDC)

23.4.2 Forcing System Generated IDs

Force system-generated (auto-generated) IDs to remove the power of creating unique IDs from administrators.

Context

In most cases, you want SAP SuccessFactors Learning to auto-generate a unique ID. Your administrators know their courses by their title, for example, or their equipment by the facilities where it's located. They use (in this example)

the title or the address to search for courses or equipment. To these administrators, the ID is just a string that uniquely identifies the course or equipment.

In some other cases, however, the ID of the course or facility must conform to a set code. For example, your administrators might need to call a workplace safety course **WKP-100**. Or, they might need to identify a piece of lab equipment by its serial number. In these cases, you can allow the administrators to create their own IDs. Even when administrators create their own IDs for entities, the system checks that the ID is unique.

> **Note**
>
> Decide how your IDs are created when you first implement, and then keep it the same because your administrators become accustomed to how the system identifies its records.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Configuration* > *Auto Generated IDs*.
2. To force system-generated IDs for any object, select *Enable*.
3. To create a prefix, type the prefix in *ID Prefix*.

   The ID Prefix contains common characters that appear before every uniquely generated ID. For example, you can use three letter codes to appear before each entity type, so that ITM appears before items. Items with auto-generated IDs would then have IDs like ITM100, ITM101, ITM102, and so on.
4. To add a unique Site ID to the auto-generated ID, select *Site Prefix* and then determine the order of the ID and the Site prefix in *Ordering*.

   If you're using learning Sites to give your extended enterprise access to your courses, then *Site Prefix* applies to you. Most companies don't use Sites.

   Site prefixes identify a particular instance of the application. You set the site prefix in the Global Variables section. Site prefixes identify a particular instance of the application. The radio buttons determine whether the Site ID or the ID Prefix appears first in auto-generated IDs. The ordering of the final auto-generated ID can be:
   - Site ID / ID Prefix / unique number
   - ID Prefix / Site ID / unique number

   The unique, generated number always appears at the end of the string. If you've provided no ID Prefix and you don't select the Site Prefix, then the ID only includes the uniquely generated number.

23.4.3 Configuring Attachment Logic and Limits in SAP SuccessFactors Learning

Enable limits for attachments in SAP SuccessFactors Learning to put checks on your administrators and make sure that they aren't uploading files that are too large.

Context

> **Note**
>
> In SAP SuccessFactors Learning, attachment limits are spread across three system configuration files: *ATTACHMENT*, *CONTENT IMPORT*, and *LMS_ADMIN*. You can edit all the files by going to: *System Administration* > *Configuration* > *System Configuration*.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Open *LMS_ADMIN* and set its attachment limits.

Property	Description
`fileUploadMaxSize`	In most cases, `fileUploadMaxSize` applies to images that you upload (for example, thumbnail images). It contains the limit, in bytes, of uploaded files **not** covered by the settings in the *ATTACHMENT* system property file or by `maximumFileSizeKB` and `backgroundThresholdFileSizeKB` in the *CONTENT IMPORT* system property file. The value can be between 0 (no uploads) to 21474836642 (2 GB). We recommend a value greater or equal to 65536 bytes or SAP SuccessFactors Learning might not function properly.
`fileUploadFilenameMaxSize`	The `fileUploadFilenameMaxSize` property contains the limit, in characters, of a file name for files to be uploaded to the server.
`resourceUploadMaxSize` `resourceUploadWarningSize`	The `resourceUploadMaxSize` property contains the maximum size, in bytes, of files that can be uploaded for Plateau Question Editor (PQE). The most commonly uploaded files are images. The `resourceUploadWarningSize` property contains the limit, in bytes, at which PQE users are warned that their image is too big. As long as users do not exceed the bytes in the `resourceUploadMaxSize` property, they can still upload after the warning. **Please use assessments instead of PQE.**

3. Save and close *LMS_ADMIN*, open *CONTENT IMPORT* and set its attachment limits.

Property	Description
`maximumFileSizeKB`	`maximumFileSizeKB` is the maximum size of a file, in KB, that an administrator can upload from the content import tool. Set this to a value that protects your content server and that is reasonable for your types of online course content.
`supportedFileExtensions`	If an administrator attempts to upload individual files, or files in a zip file that isn't AICC or SCORM format, with an extension that **isn't** on the list in `supportedFileExtensions`, then the import stops and the administrator sees a warning about file types.
`backgroundThresholdFileSizeKB`	Set `backgroundThresholdFileSizeKB` to a reasonable limit to avoid locking your administrators while they are using the content import tool. If administrators attempt to upload a file that is over this threshold (in KB), then they must run the import as a background job. By offloading the job to the background, they can continue to do other work while the file uploads.

4. Save *CONTENT IMPORT*, open *ATTACHMENT* and set its attachment limits.

Property	Description
`attachmentsEnabledForEntity.*`	The `attachmentsEnabledForEntity` enables attachments when you use the learning event recorder. The learning event recorder posts completion to SAP SuccessFactors Learning when users finish a class. You sometimes want to enable attachments so that your users can, for example, add a certificate of completion for a course that they took outside of Learning. • `LEARNING_ITEM_HISTORY` - Controls the upload process when users run the learning event recorder. • `LEARNING_EXTERNAL_HISTORY` - Controls the upload process when users run the learning event recorder and record an external learning event.
`supportedAttachmentTypes[*]`	Each `supportedAttachmentTypes` property contains a file extension in brackets. If their value is set to true, then they are the file extensions that users are allowed to upload when using the processes enabled by the `attachmentsEnabledForEntity.*` properties. If you set to false, then when users try to upload a file that has the extension, they see a warning and are prevented from continuing.
`maximumSizePerAttachmentKB`	The `maximumSizePerAttachmentKB` property value contains the maximum size that a single attachment can be, in KB. This applies to uploads for the learning event recorder tool. If a user exceeds the limit, they see an error and can't continue. The default setting is 800 KB. This applies to uploads for the learning event recorder tool. For emailed reports, if any report output attachment is larger than the allowable email server size (18 MB), the recipient receives email notification that the size exceeded the allowable limit. The report can be retrieved in the report jobs tab of the originating user.

Property	Description
`totalAttachmentSpaceAllocatedKB`	The `totalAttachmentsSpaceAllocatedKB` property value is the total amount of space (in KB) allowed in the database for attachments. Set it to a reasonable number to keep your database growth under control. The attachments space email notification (an Automatic Process: *System Administration* > *Automatic Processes* > *Exceeded Attachment Space Email Notification*) notifies an administrator when the size of the attachments in the database reaches a percentage of the total space allocated here.

5. Save and close *ATTACHMENT*.

Next Steps

Go to *System Admin* > *Administration* > *Automatic Processes* > *Exceeded Attachment Space Email Notification* and set the threshold at which you're notified of attachment limits.

23.4.3.1 Exceeded Attachment Space Email Notification

Schedule the exceeded attachment space email notification process (template ID `ApmAttachmentQuotaWatch`) to receive an email notification when the combined size of the attachments in the system equals or exceeds the allotted space.

Prerequisites

Check or set the attachments limits. You usually do this at initial implementation.

> **Note**
>
> In SAP SuccessFactors Learning, attachment limits are spread across three system configuration files: *ATTACHMENT*, *CONTENT IMPORT*, and *LMS_ADMIN*. You can edit all the files by going to: *System Administration* > *Configuration* > *System Configuration*.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Exceeded Attachment Space Email Notification*.
2. In *Schedule*, set the period for the optimization process.

3. In *Email Address*, type the address that should receive email notification about attachment limits.
4. In *Utilization Threshold*, set the percentage of your limits that, when reached, SAP SuccessFactors sends a message to the contact person that the attachments utilization is near full.

   If you want the process to send a notification when the system is using 80% or more of the value in the `totalAttachmentsSpaceAllocatedKB` property, type **`80.`**

   > **Note**
   >
   > Because the value in the *Utilization Threshold* box is a percentage, type (for example) **`80`** not **`.80`**.

5. Click *Apply Changes*.

Results

Exceeded Attachment Space Email Notification tells you when you're nearing the limit set by `totalAttachmentsSpaceAllocatedKB` in *System Administration* > *Configuration* > *System Configuration* > *ATTACHMENT*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.4 Adding Custom Fields

Create custom fields when you want to store data in a SAP SuccessFactors Learning, but we don't provide a way for you to store it.

Prerequisites

Set up the Assignment Profile Synchronization process during your initial implementation to detect changes in your custom fields.

Context

> ⚠ Caution
>
> Read audit reports do **not** include sensitive information that is stored in custom fields or in free-text fields, such as comments. For greater data protection and privacy, do **not** use custom fields to capture sensitive information and ensure than users of your system don't enter sensitive information in free-text fields, such as comments.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Custom Fields* .
2. Under *Custom Fields*, select the type of custom field that you want to create.

   You select where this data is stored. For example, if you select *User*, then you're creating a custom field for the user entity. Custom fields can't be shared across entities.
3. Choose *Add New*.

   When you choose the *Add New* link for a custom field, you must provide a field number that is unique for that type of custom field. After you create the new custom field, you can't change its field number, and you can set the value of the custom field on the *Custom Fields* tab for that entity type. The *Field Number ID* must be unique to the custom field. The number of the *Field Number ID* sets the order that it appears when an administrator accesses the Custom Fields tab. Therefore, if the order is important and you might need to add other custom field at a later time, then we recommend that you develop a numbering strategy to account for these changes. For example, you could use a 4-digit numbering system that starts with "0100" and increments by 50 for Field Number. In this way, you can keep the view sorted as you want and still have the option to add up to 49 additional values between each value.
4. In *Label*, type a label that helps other administrators understand what data they should add in this custom field.

   For example, if you want administrators to type a vendor code for the learning item in this custom field, you can use the label **`Vendor Code`**.
5. Select *Referenced* if you want administrators to choose the value for the custom field from a list. Clear it if you want administrators to type their own value in the custom field.
6. Choose *Add*.
7. If you select *Referenced*, provide a *Reference ID* and *Description* for each list item and then choose *Add*.

   The Column Number ID must be unique to the custom field.

   The description of the Column Number ID is critical because it links the label of the custom field with the values that administrators can apply. Therefore, we recommend that you create a concise and complete description for each Column Number ID that you add.
8. Click to translate the label for administrators who don't speak the default language.
9. Click *Apply Changes*.

Next Steps

When the Assignment Profile Synchronization runs, it detects changes in the custom columns and syncs them to the Assignment Profile rule metadata. Please wait for the next run of the Assignment Profile Synchronization process to complete before verifying that the rule selection reflects your changes.

23.4.4.1 Learning Custom Fields

Learning custom fields extend the attributes of an entity.

If an entity like class, user, or item doesn't have an enumerated list that you need, then you can add a custom field for that entity type. For example, you might want to track a vendor code on learning items so that you can see who is responsible for delivering the course. We don't include a vendor code list be default. You can add a Vendor Code custom field for learning items so that administrators can type the vendor code in *Learning Activities* > *Items*.

When you create custom fields, you make it easier to group entities, to search for entities, and to report on entities. For example, imagine if you create a custom field called "Worker Shift" and you limit the values to "Morning", "Evening", and "Overnight." You attach the custom field to user records so that each user can be identified by his or her usual shift. You can run reports on users by shift, you can find them in *People* > *Users* by shift, and you can group them by shift to assign all overnight shift workers a course on managing work/life balance when your hours are different from your family's normal hours.

> ⚠ Caution
>
> Read audit reports do **not** include sensitive information that is stored in custom fields or in free-text fields, such as comments. For greater data protection and privacy, do **not** use custom fields to capture sensitive information and ensure than users of your system don't enter sensitive information in free-text fields, such as comments.

> ⓘ Note
>
> Safeguards are now added to prevent Sensitive Personal Data (SPD) in SAP SuccessFactors from syncing to or being stored in Learning custom fields.
>
> If custom fields are mapped to SPD fields in SAP SuccessFactors Learning, a designated administrator or group of administrators are notified. And when the SAP SuccessFactors User Connector or User Sync is run, no new data is saved, and the existing data is deleted after seven days.
>
> You can add notification email addresses in the Administration UI under the configuration 'sensitivePrivateDataContactEmail' in the configuration file found at *System Administration* > *Configuration* > *System Configuration* > *BIZX*. Otherwise, these notifications will only be recorded in the SAP SuccessFactors User Connector logs.

The following custom field types have search capability:

- Class
- Cohort
- Curricula
- Instructor

- Item
- Job Codes
- Objective
- Organization
- Program
- User

23.4.4.2 Adding Custom Fields for the User Entity

You can create custom fields of type string, integer, and decimal for the *User* entity to create dynamic assignment profiles, run targeted searches, and generate detailed reports.

Procedure

1. Go to *Learning Administration* > *System Administration* > *Custom Fields* > *User* .
2. Choose *Add New*.
   User Custom Fields popup appears.
3. In *Field Number*, choose a unique field number.

   After you create a new custom field, you can't change its field number. The *Field Number* must be unique to each user custom field. The number of the ID sets the order that it appears when you access the *Custom Fields* tab. Therefore, if the order is important and you need to add other custom field later, then we recommend that you develop a numbering strategy to account for these changes.
4. In *Label*, type a label that helps understand the type of data to be stored in this custom field.
5. In *Data Type*, select the type of the field you want to create: *String* (default selection), *Integer*, or *Decimal*.

   > **Note**
   >
   > You can set the data type only for the custom fields that you create. The default user custom fields are predefined as *String* and their data type can't be changed.
6. Select *Referenced* if you want to choose a value for the custom field from a list.

   > **Note**
   >
   > Reference values aren't supported if you've selected *Decimal* or *Integer* as the data type.
7. Choose *Add*.
8. **Optional:** If you've selected *Referenced* for the custom field, in *Edit the User Custom Field*, provide a *Reference ID* and *Description* for each list item.
9. Choose *Add*.
10. In *Update the User Custom Field*, add translated labels for different locales. You can also update the field label and the data type, if needed.
11. Choose *Apply Changes*.

Results

The custom field is created.

Next Steps

- You can use the custom user fields when configuring rules for assignment profiles. As a prerequisite, run the *Assignment Profile Execute Changes Automatic* process for the custom fields to appear in *Assignment Profiles*.
- You can include the custom user fields in the *Account Data*, *User Personal Information* and *User Information* standard reports and custom reports. Ensure you choose the *Include Custom Fields* option when you run the reports.

> → Remember
>
> To display integer and decimal custom fields in a specific format, such as using number separators, in custom reports, you must manually configure each field using the *Learning Report Designer* tool.

Related Information

Setting Up Assignment Profile Rules [page 380]
User Attributes Available to Assignment Profiles [page 385]
Running Reports in Learning
Downloading Learning Report Designer [page 1318]

23.4.4.3 Referenced and Non-Referenced Custom Fields

A referenced custom field requires administrators to choose from a set of enumerated values, but a non-referenced custom field allows them to type any value into the custom field.

There are two types of custom fields that you can create: referenced or non-referenced. When you create a custom field:

- If you select *Referenced*, then the custom field is referenced.
- If you clear *Referenced*, then the custom field is non-referenced.

Referenced fields require an enumerated list of allowed values. You create reference IDs and descriptions so that administrators can select the appropriate value from a list of values. For example, if you create a referenced custom field called “Shift” to describe users' working shifts as Morning, Evening, or Overnight. The list includes, therefore three list items: Morning, Evening, and Overnight.

Non-Referenced fields appear to administrators as a plain text box. They can type any value to the custom field. If you are using this custom field for other processes, such as assignment profiles, we recommend that you choose referenced fields instead of non-referenced fields. Referenced fields help administrators avoid mistakes.

Related Information

Switching Between Referenced and Non-Referenced Types of Custom Fields [page 1049]

23.4.4.4 Switching Between Referenced and Non-Referenced Types of Custom Fields

You can switch an existing custom field between referenced and non-referenced type, but you should understand the system behavior before you do it.

If you create a referenced custom field, provide reference IDs and descriptions, and then decide to make the custom field unreferenced by clearing the*Referenced* checkbox, then the system changes the value on the *Custom Fields* tab and throughout SAP SuccessFactors Learning Administration. That is, the value was the reference ID and description; after this change, the value is just the reference ID. If you re-select the *Referenced* checkbox, then the system restores all of your reference IDs and descriptions and reapplies those values on the *Custom Fields* tab.

Related Information

Referenced and Non-Referenced Custom Fields [page 1048]

23.4.4.5 SAP SuccessFactors Learning Custom Fields Reference

The settings in the custom field page control how the custom field behaves.

To edit these fields, go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Custom Fields*.

> ⚠ Caution
>
> Read audit reports do **not** include sensitive information that is stored in custom fields or in free-text fields, such as comments. For greater data protection and privacy, do **not** use custom fields to capture sensitive information and ensure than users of your system don't enter sensitive information in free-text fields, such as comments.

This Field...	...Is Used as Follows
Field Number	When you choose the *Add New* link for a custom field, you must provide a field number that is unique for that type of custom field. After you create the new custom field, you can't change its field number, and you can set the value of the custom field on the *Custom Fields* tab for that entity type. The *Field Number ID* must be unique to the custom field. The number of the *Field Number ID* sets the order that it appears when an administrator accesses the Custom Fields tab. Therefore, if the order is important and you might need to add other custom field at a later time, then we recommend that you develop a numbering strategy to account for these changes. For example, you could use a 4-digit numbering system that starts with "0100" and increments by 50 for Field Number. In this way, you can keep the view sorted as you want and still have the option to add up to 49 additional values between each value.
Label	The label is what other administrators see to understand what they should enter into the custom field.
Referenced	If you select the *Referenced* checkbox, then you create a referenced custom field instead of a nonreferenced custom field. Referenced custom fields require administrators to select from a list of allowed values for the custom field. The administrators see the label for the list item and Learning stores the Column Number ID.
Column Number ID	The Column Number ID must be unique to the custom field.
Description	The description of the Column Number ID is critical because it links the label of the custom field with the values that administrators can apply. Therefore, we recommend that you create a concise and complete description for each Column Number ID that you add.

23.4.5 Data Purge

The SAP SuccessFactors HCM suite stores a wide range of information about your employees. Generally speaking, historical data should not be stored any longer than is required. Once the required retention time has passed, data should be purged. A data purge is a means of permanently removing data from storage.

For the purpose of data protection and privacy, you may be required to purge user data from your system after a certain length of time. You may also choose to purge user data simply because it no longer serves any business purpose.

To meet this requirement, SAP SuccessFactors provides the ability to purge different types of data across the HCM suite, on a recurring schedule and based on configurable retention times.

23.4.5.1 Native-Only SAP SuccessFactors Learning Customer Configurations

A native-only SAP SuccessFactors Learning configuration is one that does not use SAP SuccessFactors platform. This configuration is rare.

A native-only customer is one that has not adopted SAP SuccessFactors platform, so user identities are known only to SAP SuccessFactors Learning. There are many advantages to adopting the platform, but a few include:

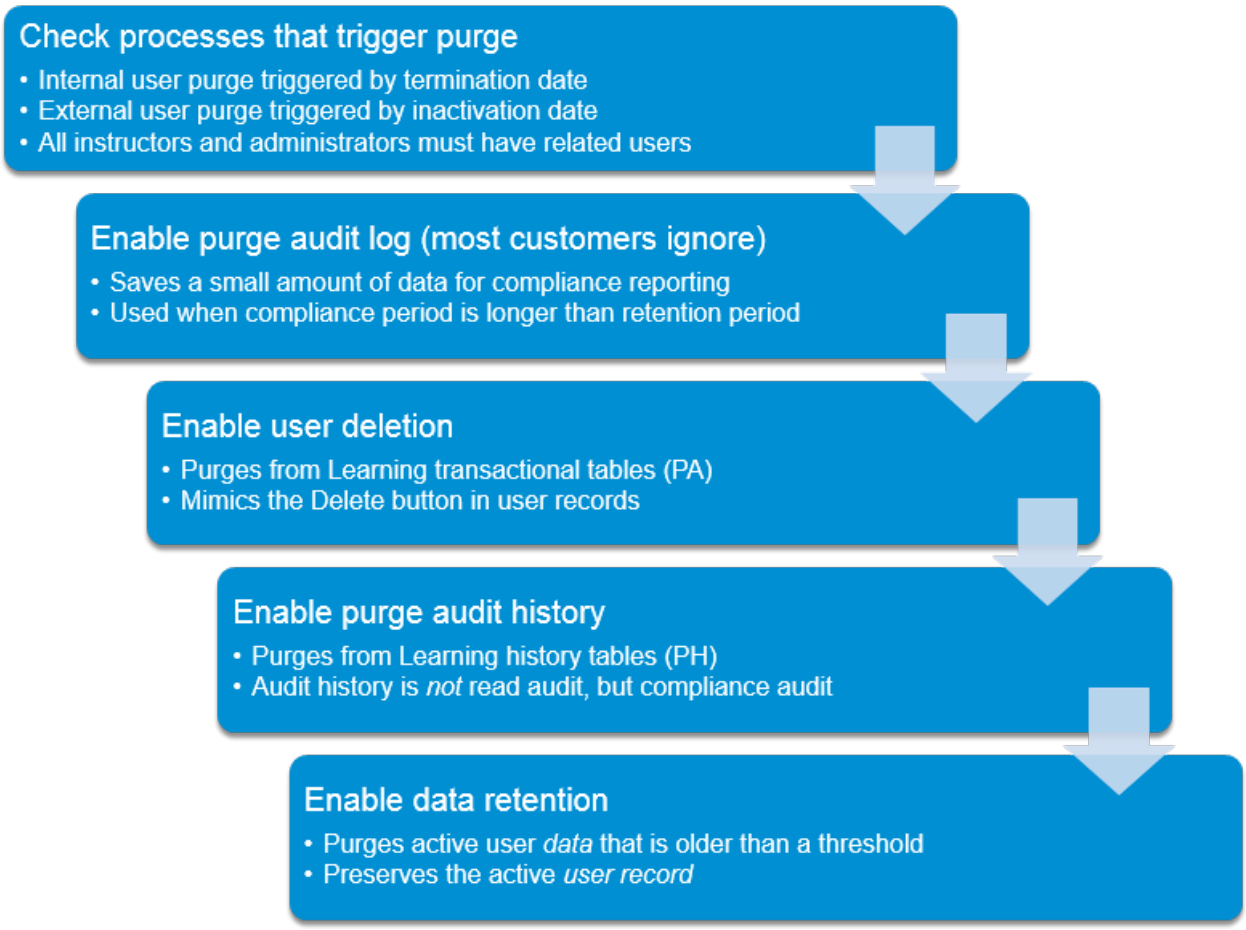
- As a platform customer, you can use standard SAP SuccessFactors data retention management tools. As a native-only customer, you have a different process.
- As a platform customer, you can easily adopt other parts of the SAP SuccessFactors suite, including single sign-on and integration center.
- You are ready for the eventual retirement of the native-only configuration.

> ⓘ Note
>
> Only a small minority of customers is native-only, so chances are that you have adopted platform.

23.4.5.1.1 Purge Process for Native-Only Learning Configurations

Use the purge process for native-only Learning configurations when users are **not** part of SAP SuccessFactors platform and when you want to remove user or their information (like learning assignments, history, and personal information) from SAP SuccessFactors Learning.

When you set up data purge, you create a process that removes all traces of user data from the system. In the case of Learning native-only users, all user information is contained in Learning, so all purge takes place inside of the Learning Management System (LMS). Native-only configurations are uncommon, so most customers do **not** follow this process. Most customers use Data Retention Time Management (DRTM) or Data Retention Management (DRM) to enable their purge policy because user information is stored in the suite, not contained to Learning.



- Process Prerequisites for Native-Only Learning User Purge [page 1053]
- Enabling the SAP SuccessFactors Learning Audit Purge Log [page 1060]
- Deleting SAP SuccessFactors Learning Users without Data Retention Management [page 1062]
- Enabling the Purge Deleted User Audit History Job in Learning [page 1068]
- Enabling a Partial Purge of User Information for Native-Only Learning Users [page 1071]

23.4.5.1.2 Process Prerequisites for Native-Only Learning User Purge

Most native-only SAP SuccessFactors Learning customers already have a termination and an inactivation process, and also have related users for administrators and instructors as part of their user management process, but check the processes when you set up native-only purge.

Processes that Trigger Purges

Full purge begins when users separate from your organization. The SAP SuccessFactors Learning purge process looks for triggers to begin:

- For **internal** users, the trigger is their termination date.
- For **external** users, the trigger is their inactivation date.

For most native-only customers, the processes run through a user connector to a Human Resources Information System (HRIS). Administrators who have permission, however, can edit termination dates or to inactivate users can create the triggers outside of the standard process. For example, an administrator with permission can go to *People* > *Users* and add a termination date to a particular user. For the purposes of **process**, however, one-off changes aren't typical and we don't recommend them because this kind of administrator intervention doesn't scale.

Prerequisite to trigger Learning native-only full data purge	How customers typically meet the prerequisite	Why you need the prerequisite
A termination process for employees (internal users)	In most cases, native-only customers add a termination date for their internal users with a user connector from a third-party Human Resources Information System (HRIS).	The end-to-end purge process begins with user deletion. In the native-only configuration, **internal** users' deletion is triggered by **termination** dates. When a termination date is older than a threshold, the user is deleted. After users are deleted, the purge process then triggers later stages until ultimately, users' data is purged from the system.
An inactivation process for the extended enterprise users (external users)	In most cases, native-only customers add an inactivation date for their external users with a user connector from a third-party Human Resources Information System (HRIS).	The end-to-end purge process begins with user deletion. In the native-only configuration, **external** users' deletion is triggered by **inactivation** dates. When an inactivation date is older than a threshold, the user is deleted. After users are deleted, the purge process then triggers later stages until ultimately, users' data is purged from the system.

User Management Processes Required by Purge

To use purge, your user management process must include related users for instructors and administrators. Missing related users is most common in native-only configurations. You can check for missing related users with the *Is Emtpy* search in instructors and administrators.

If you have empty related users, correct the issue in your system and your user management process before configuring purge.

Configuring Search Selectors to Find Empty Related Users [page 1054]
: Change search selectors to find empty related users so that you can easily search for the list of administrators and instructors who need related users.

Finding Instructors Without Related Users [page 1056]
: Find instructors without related users to correct non-standard configurations.

Assigning a Related User to Instructors [page 1057]
: Assign related users to instructors so that instructors can log in to the instructor dashboard (*My Classes*).

Finding Learning Administrators Without Related Users [page 1058]
: Find administrators without related users to correct non-standard configurations.

Assigning a Related User to a Learning Administrator [page 1059]
: Assign related users to administrators to correct user configuration issues.

SAP SuccessFactors Learning Native Deeplink User [page 1059]
: How you set native deeplink controls how Learning recognizes both link redirects and also how it recognizes the user as native or not native.

Enabling the SAP SuccessFactors Learning Audit Purge Log [page 1060]
: Enable the purge log to preserve users' first names, last names, and IDs even after the *Purge Deleted User Audit History* process runs.

23.4.5.1.2.1 Configuring Search Selectors to Find Empty Related Users

Change search selectors to find empty related users so that you can easily search for the list of administrators and instructors who need related users.

Context

We strongly recommend that all SAP SuccessFactors Learning administrators and SAP SuccessFactors Learning instructors have related users. Although this is a problem most often in native-only user customers, it might occur also in integrated environments. By configuring search selectors to find empty related users, you can easily find problems to fix.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *Search Selectors*.
2. Find and edit the *Instructor* search selector and the *Admin* search selector to add `IsEmpty` to the related user search field.
3. Look for `criteria.Student.criterionUI.uiLabel=label.RelatedUser`.

   This is the criterion that configures the related user search field.
4. At the end of the `criteria.Student`, look for `criteria.Student.criterionUI.matchOptions.OP_NULL`.
5. If `criteria.Student.criterionUI.matchOptions.OP_NULL` is missing, add it.

   For example, this configuration sets up the null option (*Is Empty*) in the sixth position in the list:

   ```
   criteria.Student.criterionUI.matchOptions.OP_NULL.enabled=true
   criteria.Student.criterionUI.matchOptions.OP_NULL.order=6.0
   criteria.Student.criterionUI.matchOptions.OP_NULL.value=OP_NULL
   criteria.Student.criterionUI.matchOptions.OP_NULL.label=label.IsEmpty
   criteria.Student.criterionUI.matchOptions.OP_NULL.labelValue=null
   ```
6. Click *Apply Changes*.

Next Steps

Go to *System Administration* > *Application Administration* > *Administrators* to check that *Related User* has *Is Empty* in its list.

Go to *People* > *Instructors* to check that *Related User* has *Is Empty* in its list.

Task overview: Process Prerequisites for Native-Only Learning User Purge [page 1053]

Related Information

Finding Instructors Without Related Users [page 1056]
Assigning a Related User to Instructors [page 1057]
Finding Learning Administrators Without Related Users [page 1058]
Assigning a Related User to a Learning Administrator [page 1059]
SAP SuccessFactors Learning Native Deeplink User [page 1059]
Enabling the SAP SuccessFactors Learning Audit Purge Log [page 1060]

23.4.5.1.2.2 Finding Instructors Without Related Users

Find instructors without related users to correct non-standard configurations.

Context

Native-only customers can create instructors without related users. This was common in early configurations when instructors were tracked as resources and not as a leader of courses. Newer features, however, require related users for instructors.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Instructors*.
2. In *Related User*, select *Is Empty*.

   > **Note**
   >
   > If you don't see *Is Empty*, add it to the search selector.

3. Click *Search*.

   You see all instructors that lack a related user. These instructor records are at risk for strange behavior in the system.
4. Click *Download Search Results* to save the results.

   The results that you save are the list of instructors to troubleshoot and fix.

Next Steps

Troubleshoot and fix each search result:

- If you're integrated with platform, then empty related users are a symptom of a problem in the user feed from platform. Check the feed.
- If you're a native-only customer, then chances are that you created the instructor and then forgot to add the related user. You can simply add the related user to the instructor.

Task overview: Process Prerequisites for Native-Only Learning User Purge [page 1053]

Related Information

Configuring Search Selectors to Find Empty Related Users [page 1054]

Assigning a Related User to Instructors [page 1057]
Finding Learning Administrators Without Related Users [page 1058]
Assigning a Related User to a Learning Administrator [page 1059]
SAP SuccessFactors Learning Native Deeplink User [page 1059]
Enabling the SAP SuccessFactors Learning Audit Purge Log [page 1060]

23.4.5.1.2.3 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: Process Prerequisites for Native-Only Learning User Purge [page 1053]

Related Information

Configuring Search Selectors to Find Empty Related Users [page 1054]
Finding Instructors Without Related Users [page 1056]
Finding Learning Administrators Without Related Users [page 1058]
Assigning a Related User to a Learning Administrator [page 1059]
SAP SuccessFactors Learning Native Deeplink User [page 1059]
Enabling the SAP SuccessFactors Learning Audit Purge Log [page 1060]

23.4.5.1.2.4 Finding Learning Administrators Without Related Users

Find administrators without related users to correct non-standard configurations.

Context

Native-only customers can create administrators without related users. This was common in early configurations when administrators weren't also learners. Newer features, however, require related users for administrators.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Security* > *Administrators*.
2. In *Related User*, select *Is Empty*.

   > **Note**
   >
   > If you don't see *Is Empty*, add it to the search selector.

3. Click *Search*.

   You see all administrators that lack a related user. These administrator records are at risk for strange behavior in the system.
4. Click *Download Search Results* to save the results.

   The results that you save are the list of administrators to troubleshoot and fix.

Task overview: Process Prerequisites for Native-Only Learning User Purge [page 1053]

Related Information

Configuring Search Selectors to Find Empty Related Users [page 1054]
Finding Instructors Without Related Users [page 1056]
Assigning a Related User to Instructors [page 1057]
Assigning a Related User to a Learning Administrator [page 1059]
SAP SuccessFactors Learning Native Deeplink User [page 1059]
Enabling the SAP SuccessFactors Learning Audit Purge Log [page 1060]

23.4.5.1.2.5 Assigning a Related User to a Learning Administrator

Assign related users to administrators to correct user configuration issues.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Security* > *Administrators*.
2. Find and open the administrator who you want to edit.
3. In *Summary*, add the associated user in *Related User*.
4. Choose *Apply Changes*.

Task overview: Process Prerequisites for Native-Only Learning User Purge [page 1053]

Related Information

Configuring Search Selectors to Find Empty Related Users [page 1054]
Finding Instructors Without Related Users [page 1056]
Assigning a Related User to Instructors [page 1057]
Finding Learning Administrators Without Related Users [page 1058]
SAP SuccessFactors Learning Native Deeplink User [page 1059]
Enabling the SAP SuccessFactors Learning Audit Purge Log [page 1060]

23.4.5.1.2.6 SAP SuccessFactors Learning Native Deeplink User

How you set native deeplink controls how Learning recognizes both link redirects and also how it recognizes the user as native or not native.

Depending on how you set *Native Deeplink User*, you mark the user as either coming in from SAP SuccessFactors HCM suite through the connector or a user who is native to learning. Your user base can be mixed, with some SAP SuccessFactors HCM suite users and some native Learning users.

- If the user is native to Learning and has no record in SAP SuccessFactors platform, set *Native Deeplink User* to *Yes* or true.
- If the user is not managed in Learning but is instead is managed in SAP SuccessFactors platform, set *Native Deeplink User* to *No* or false.

Native Deeplink Effects on URLs

Stand-alone customers' users are tagged as *Native Deeplink* users. This tag changes the way that URLs are constructed for the users' deeplinks. If those users later become part of an integrated environment, their URLs continue to be formatted for a stand-alone environment, and so they break in an integrated environment. By enabling the redirect, SAP SuccessFactors redirects them from the stand-alone URL to the integrated URL.

Native Deeplink Effects on Delete Inactive Native Users Automatic Process

The delete native inactive users automatic process deletes users who are **not** part of SAP SuccessFactors platform. The process uses the value of *Native Deeplink* as one way to distinguish between platform users and native users. If you set *Native Deeplink* incorrectly, the process can skip native users who should be deleted and delete platform users who should **not** be deleted.

Parent topic: Process Prerequisites for Native-Only Learning User Purge [page 1053]

Related Information

Configuring Search Selectors to Find Empty Related Users [page 1054]
Finding Instructors Without Related Users [page 1056]
Assigning a Related User to Instructors [page 1057]
Finding Learning Administrators Without Related Users [page 1058]
Assigning a Related User to a Learning Administrator [page 1059]
Enabling the SAP SuccessFactors Learning Audit Purge Log [page 1060]

23.4.5.1.2.7 Enabling the SAP SuccessFactors Learning Audit Purge Log

Enable the purge log to preserve users' first names, last names, and IDs even after the *Purge Deleted User Audit History* process runs.

Context

> ⓘ Note
>
> Most customers don't enable the purge log.

A few customers have a data privacy and protection policy that requires them to preserve a learning audit trail even after the *Purge Deleted User Audit History* process runs. The case to log purged users is rare but critical to the business of customers who are audited by an oversight organization.

> → Tip
>
> Check laws, contracts, and guidelines that balance data privacy and protection with audit traceability.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *LMS_ADMIN*.
3. Find `enablePurgeLog` and set it to `true`.
4. Click *Apply Changes*.

Example

For example, some Life Sciences customers in the United States are audited by the Food and Drug Administration (FDA). They must show the FDA that when a learning event occurred (an approval, a completion, and so on) that a particular user was a part of that event (approved it, marked the event complete, and so on). If their data privacy and protection policy purges users **before** the audit period ends, then they need a way to tie the user to the learning event.

To understand the timing, imagine someone who works at a Life Sciences organization and who approves learning. The company's data privacy and protection requires that most of this person's data must be purged after six months of separation with the company, but carries an exception: for audit purposes, the users' first name, last name, ID, and date of purge can be preserved for auditing purposes. The customer enables the purge log so that SAP SuccessFactors Learning writes the exempted information to a log.

With the log, if the FDA audits the customer nine months after the user separates from the company, the FDA can see enough personal identification to complete the audit without seeing information that is irrelevant to the audit. For example, the FDA can't see the users' phone numbers, address, and so on, because it was purged and **not** logged.

Task overview: Process Prerequisites for Native-Only Learning User Purge [page 1053]

Related Information

Configuring Search Selectors to Find Empty Related Users [page 1054]
Finding Instructors Without Related Users [page 1056]
Assigning a Related User to Instructors [page 1057]

Finding Learning Administrators Without Related Users [page 1058]
Assigning a Related User to a Learning Administrator [page 1059]
SAP SuccessFactors Learning Native Deeplink User [page 1059]

23.4.5.1.2.7.1 SAP SuccessFactors Learning Audit Table Purge Log

SAP SuccessFactors Learning can keep a log of users whose personal information is purged from Learning audit tables.

When the *Purge Deleted User Audit History* process runs and purges user data, SAP SuccessFactors Learning can log the users who were purged **from the audit tables**. The log includes only the following information of the user who was purged from the history tables:

- User system ID
- User student ID
- User first and last name
- Purge date and time
- User type (user, administrator, or instructor)

> ⓘ Note
>
> In most cases, you don't want to enable the log because the point of the audit history purge is to remove all user information permanently.

> ⓘ Note
>
> Although we store the log in the database, we don't surface the information in the Graphical User Interface (GUI).

23.4.5.1.3 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.

This Field...	...Deletes these records
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*.

Related Information

Scheduling Learning Automatic Processes [page 1245]

23.4.5.1.3.1 Excluding People from the Learning Native User Data Purge

Exclude people from the Learning native user data purge if you want to make an exception and keep their data 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 *Native User Data Retention* process usually purges users' Learning data after the data has expired. 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.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Native User Data Retention*.
2. Check that the process is enabled and look at *Purge user data older than the specified retention period* to see when you should expect users' data to be purged 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* in *Record Type*, add the ID that you found in *People* > *Users* in *Record ID*, and then click *Add*.
   b. Select *Primary Instructor*, add the ID that you found in *People* > *Instructors* in *Record ID*, and then click *Add*.

c. Select *Admin*, add the ID that you found in *System Administration* > *Security* > *Administrator Management* in *Record ID*, and then click *Add*.

Next Steps

If you add a person to the exclusion list for the data purge, then you probably also want to add the user to the exclusion list for the *Purge Deleted User Audit History* process.

23.4.5.1.3.2 The Full Purge Process that Learning Follows for Native-Only Customers

If your SAP SuccessFactors Learning isn't integrated with SAP SuccessFactors platform, then it follows a different process to fully purge user data. This is uncommon.

1. Users begin in the transactional state: they're standard users of the system and their audit history and transactional data are stored in SAP SuccessFactors Learning because native-only customers don't have SAP SuccessFactors platform. **internal users'** employment. Native-only customers terminate internal users' employment with one of these methods:
2. Individual internal users are terminated and instructors or external users are inactivated so that they move from the transactional stage to the deleted or inactivated stage.
   - Termination or inactivation can happen directly on the user record: you can set a termination date in the users' summary data or you can set them to inactive in their summary data (*People* > *Users*).
   - More likely, however, an automated user connector runs from another Human Resources Information System (HRIS) and automatically adds a termination date or inactivates a user.
3. Terminated internal users and inactivated instructors or external users are deleted so that they move from the inactivated or terminated stage to the deleted stage. Native-only users move to deleted stage through one of these mechanisms:
   - Move to deleted stage by the *Delete Inactive Native User* process: They've been inactive or terminated for longer than the threshold that you designedand so they're deleted.
   - A learning administrator deletes the user directly in *People* > *Users*.
4. Deleted users are purged completely from the system so that they move from deleted to purged. Unless you added a user to the exclusion list, the *Purge Deleted User Audit History* process deletes them completely from the system unless you:
   - Configured the purge log to save select information for external audit.
   - Added the user to the exclusion list.

23.4.5.1.3.3 Rules of SAP SuccessFactors Learning Native User Deletion Process

When the SAP SuccessFactors Learning Native User Deletion process runs, it follows a set of implicit rules to delete users. These rules aren't apparent from the configuration.

Rule	Explanation
Administrators that don't have an associated user account are **not** deleted by Delete Inactive Native User	Native User Deletion looks for inactivated accounts, but administrators can't be inactivated. Associated **user** accounts can be inactivated, however, so the user account acts as the primary account when Delete Inactive Native User runs. If you have administrator accounts that do **not** have related user accounts, you must delete them manually. Go to *System Administration* > *Security* > *Administrators*, search for the administrator, open the account, and then click *Delete*.
For any account to be deleted, the account's `PERSON_GUID` must be null	Native User Deletion is designed to run on native users: users that don't exist in SAP SuccessFactors platform. Because all users that exist in SAP SuccessFactors platform have Person GUID, then all users **without** a Person GUID are native users. We skip platform users because they're handled by Data Retention Management (DRM), a platform tool.
Accounts must be **continuously inactive** during the threshold time	Users can be inactivated and activated multiple times. Delete Inactive Native User deletes users who have been continuously inactivated over the time that you set in the delete threshold. For example, if you set the threshold to 90 days, then Delete Inactive Native User deletes users if they've been inactive during the entire 90-day period. It skips any users who are active at any time in the last 90 days. If a user is inactive at the beginning of the period, then active, then inactive again, then that user is skipped. If a user is inactive at the beginning of the period and is currently active, then that user is skipped.
Related Instructor records are always deleted	If a user is marked for deletion and that user has a related instructor record, then the instructor record is also deleted. You can't keep the instructor data and delete the associated user data: they're both deleted.
The automatic deletion process does **not** check to see if instructors are scheduled to teach in the future	If you delete an instructor in the SAP SuccessFactors Learning Administration environment, the system checks to see if the instructor is scheduled to teach any classes in the future. The automatic process doesn't check. It deletes the instructor data regardless of whether person is scheduled to teach classes in the future.

23.4.5.1.4 Enabling the Purge Deleted User Audit History Job in Learning

Enable the purge deleted user audit history job to periodically purge the audit history of deleted users. The job removes, in an unrecoverable way, all compliance history data about a user.

Prerequisites

Before users can be purged from history tables, they must first be deleted from transactional tables, so you must set up a process to handle transactional tables:

- Most customers are integrated with SAP SuccessFactors platform. If you use SAP SuccessFactors platform, then chances are that you set up Data Retention Time Management (DRTM), both the master data purge and the learning data purge.
- A few customers aren't integrated with the platform. If you aren't integrated, then you must set up the Delete Inactive Native Users process. This process acts as DRM for customers who haven't yet integrated with the platform.
- Any customer can go to a user, instructor, or administrator record and delete the record manually.

Context

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

SAP SuccessFactors Learning uses the *Purge Deleted User Audit History* process to irrevocably remove data from the `PH` tables, which are the audit history of SAP SuccessFactors Learning. Deletion is a prerequisite of the purge process, so all user data is **already** removed from the `PA` tables (the transactional tables). Deletion, in this case, means any user who has `Delete` as the final action in the user history table (`PH_STUDENT`). After you purge a user audit history, you **can't** recover any user information.

Procedure

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

   > → Tip
   >
   > If you aren't integrated with Platform, schedule the process to run after the *Delete Inactive Native Users* process or the DRM process so that the purge process has the most recent set of deleted users.

3. In *Purge deleted users' audit data after the specified number of days*, type a number of days for a grace period between deletion and purge.

   For example, if you type **10** in *Purge deleted users' audit data after the specified number of days*, then the process looks for user deletions that occurred eleven days or more in the past. Users who were deleted within the last ten days aren't purged. Those ten days are a grace period. You might, for example, run a compliance report weekly and want to include recently deleted users. If your report runs against the **PH** tables, you still see the compliance data for the users.
4. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.5.1.4.1 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.

23.4.5.1.5 Enabling a Partial Purge of User Information for Native-Only Learning Users

Configure the *Native User Data Retention* automatic process to purge SAP SuccessFactors Learning user data when you don't use SAP SuccessFactors platform Data Retention Time Management (DRTM).

Context

In most cases, your user data is purged from SAP SuccessFactors Learning transactional tables as part of the Data Retention Time Management (DRTM) tool. The DRTM tool runs centrally on SAP SuccessFactors platform. If you aren't integrated with the central SAP SuccessFactors platform, then you don't have access to DRTM and need a different way to purge users: the *Native User Data Retention* process.

Whereas *Native User Deletion* and *Purge Deleted User Audit History* work together to completely purge all data about a user who has exited the company, you set up *Native User Data Retention* to purge old data for users who are still active in your organization. For example, your policy might require the removal of audit data older than two years for current employees. The employees, in this case, don't have a termination date so you don't want to purge all data. Instead, you want to keep current data (the users' current address, phone number, and so on) the user, but purge data that is older than two years (an old approval, an old course completion, and so on).

Procedure

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

   > → Tip
   >
   > You don't need to run this process often. We recommend running it weekly.

3. In *Purge Criteria*, set the criteria for purging users.

Criteria	Description
Purge user data older than the specified retention period	SAP SuccessFactors Learning looks for native user data older than the threshold. For example, learning history like items completed before the threshold. Set the time unit to either *Years* or *Months*. For example, if you set a threshold of 2 months, and the job runs on January 5, the job deletes user data from before November 5.
Users excluded from purge	Click *Edit Exclusion List* to exclude users from purge. Although the reasons for maintaining an exclusion list depend

Criteria	Description
	on your policy, you might exclude users, for example, if you have a legal hold on their data.
User Status	You can delete active users, inactive users, or both. Configure this criteria to match your data privacy policies. For example, your policy might require a process of inactivating users before purging them. In that example, you select *Not Active*.
User Country/Region (select one or more to restrict by country)	Select the countries or regions for which you want to purge users. For example, you might purge users from Argentina but keep user data from Canada.

4. In *Data Objects Purged* select what should be purged.

Object	Description
User Personal Information	When selected, this purges information that we store about the user, attributes like name, phone numbers, and so on.
Learning Activity	When selected, this purges information that we store about the courses that a user is assigned and the courses that a user completed.

5. Click *Apply Changes*.

23.4.5.1.5.1 Excluding People from the Learning Partial Purge

Exclude people from the Learning partial purge if you want to make an exception and keep their data 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 *Native User Data Retention* process usually purges users' Learning data, but not the users themselves, after they have been deleted for a set amount of time. You can, however, exempt some 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**
>
> You can exclude users from *Native User Data Retention* only if they are already deleted from the transactional tables.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Native User Data Retention*.
2. Check that the process is enabled and look at *Purge user data older than the specified retention period* to see when you should expect user data to be purged if they are 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 *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 Admininstration* > *Security* > *Administrators*, type the ID in *Record ID*, and then click *Add*.

23.4.5.2 Purging SAP SuccessFactors Learning Background Jobs Automatically

Automatically purge SAP SuccessFactors Learning background jobs to keep your application clean of past job data.

Context

Your organization might have a policy that data must be purged on an interval. Check your policy to see if you must purge the data on a specific interval.

> **Note**
>
> The *Clean up Background Jobs* process does **not** affect the schedule of any recurring automatic process, recurring report, or job or report that is scheduled to run on a future date.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Automatic Processes* > *Purge Past Background Job Results*.
2. In *Threshold*, type the number of days that background job data (recurring background jobs and ad hoc background jobs) is considered for purge.

   For example, if you type **30** in *Threshold*, then we purge any background job data that is older than 30 days when the *Clean up Background Jobs* process runs.
3. Click *Apply Changes*.

Next Steps

The job runs periodically to look for background job data that is older than *Threshold*. Go to *System Admin* > *Automatic Processes* > *Clean up Background Jobs* to check the process that runs the purge.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.5.3 Purging SAP SuccessFactors Learning Background Reports Automatically

Automatically purge SAP SuccessFactors Learning background reports to keep your data clean of past report data.

Context

Your organization might have a policy that data must be purged on an interval. Check your policy to see if you must purge the data on a specific interval.

> **Note**
>
> When Learning purges background reports, it retains the report **job** because we assume that you want new reports, but it purges the **old report instance and its data**.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Open *REPORT_SYSTEM* and then find `asyncStorageTTLDays`.
3. Set `asyncStorageTTLDays` to the number of days after which background reports should be removed from storage.

   For example, if you set `asyncStorageTTLDays` to `90`, then SAP SuccessFactors Learning purges background reports (and the data that was reported) that are older than 90 days.

Next Steps

A job runs periodically to look for reports older than `asyncStorageTTLDays`. Go to *System Administration* > *Automatic Processes* > *Purge Past Background Reports* to check the process that runs the purge.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.5.4 Masking Email Addresses from SAP SuccessFactors Learning System Email Notifications

Mask email addresses from SAP SuccessFactors Learning so that there's less personal data stored in Learning.

Context

If you archive email messages that are system email notifications, we purge the archive based on your decisions and settings. You can, however, lower the amount of personal information that we store in the email archive by hiding sender address information.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.
2. In *Admin Notification Email* and *User Notification Email*, type an anonymous email address.

   For example, type **`SystemNotification@noreply.com`**.
3. Select *Use Admin notification email address for VLE notifications* to use the value of *Admin Notification Email* for any Virtual Learning Service (VLS) email notifications.

   For example, instead of using an instructor's email address, it uses SystemNotification@noreply.com.
4. In *Send email notification from*, choose *Select from list* and then type a comma-separated list of anonymous email addresses that administrators can choose from when they send unplanned email notifications instead of using their own.

23.4.5.5 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.

23.4.5.6 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.

23.4.6 Entity Configuration

Use *Entity Configuration* to define the visible fields and set required fields for specific entities.

If you create custom fields, you need to use *Entity Configuration* to enable them to display to administrators in specific entities. You can hide fields that aren't used by your organization, or fields that you don't want administrators to change. You can also determine which fields must be completed when administrators create new entities.

For entities supported in *Entity Configuration*, the visibility of the module tabs is determined by the corresponding permissions in *System Administration* > *Security* > *Role Management*. The visibility of module tabs can't be modified from within *System Administration* > *Configuration* > *Module Tabs*.

23.4.6.1 Displaying Fields in an Entity

You can configure the fields that display to administrators for an entity.

Context

If you create custom fields, you need to use *Entity Configuration* to enable them to display to administrators in specific entities. You can hide fields that aren't used by your organization, or fields that you don't want administrators to change.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *Entity Configuration*.
2. Use the *Select Entity* dropdown list to choose the entity to edit.
3. Locate the desired field by scrolling down the page or using the search option.
4. Select or deselect the checkbox in the *Display* column.

23.4.6.2 Making a Field Required in an Entity

You can configure the fields that are required when administrators create a new entity. Not all required fields will display while adding new entities. If a field is mandatory it will be shown on the Edit page, even if it isn't displayed on the Add New page. A validation message displays if no value is entered while saving an entity. Making a field required does not apply to existing entities.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *Entity Configuration*.
2. Use the *Select Entity* dropdown list to choose the entity to edit.
3. Locate the desired field by scrolling down the page or using the search option.
4. Select or deselect the checkbox in the *Required* column.

23.4.7 Content Player Configuration

Administrators change the content player configuration when they have a new content player or need to update an existing one.

In *System Administration* > *Configuration* > *Content Players*, you can view terms that are used in the Content Players section .

Field	Description
Description	The description appears to administrators who are looking up a content player.
Player executable file	The file path and name of the file that the content player uses to play content. This feature is used when the association between the player and the content object or exam isn't automatic in the user's environment.
Change to	If you want to change the information in the *Player executable file* field, choose the corresponding *Choose File* button to select the file.
Content compliant player	The selected player is able to read and interpret command line parameters.
Prompt for bookmark usage prior to player execution	The system prompts the user to choose whether or not to resume an exam or content object at a specified bookmark. This feature works for content compliant players only.

23.4.8 Gamification Settings

Gamification settings determine what events are sent to the gamification server and the default point values for those events.

Gamification rewards users for learning with social points and artifacts, like badges. Users can earn points and badges for doing things in learning, like completing a course (learning item) or sharing a course. In *System Administration* > *Configuration* > *Gamification Settings*, you configure which events earn users points and the default base points for the event. For example, you can assign 100 points for completing a learning item.

Entity Event Configuration Settings

This table lists down the events that are published by LMS to the Gamification server along with other details mentioned below.

This field...	...Is used as follows
Event ID	This is the unique ID of the event sent to the gamification server. The value is useful for troubleshooting, but the event name is more readable.
Event Name	This is the name of the event that appears in other places in the user interface.
Base Points	These are the Base points that are published along with the event to the gamification server. The actual points awarded is based on the rules set in the Gamification server.
Published	This is to choose whether the event is published to the Gamification server.
Event Description	This briefly describes the event and the time of when the event is published.

Search Gamification Event Status

This table is for the LMS admin to view the Completed, Failed, Pending Gamification events posted to the Gamification server.

This field...	...Is used as follows
User ID	This is the ID of the User.
Event Type	This is the Gamification Event Type (Item Completion / Item Launch etc.).
Event Key	This is the Unique identifier for the Event.
Status	This is the Event Status (Completed, Failed, Pending).
Created Date	This is the Event creation date.
Updated Date	This is the date the event was updated.
Error	This is the error message.

23.4.8.1 GAMIFICATION System Properties File

These settings control the connection from SAP SuccessFactors Learning to the game server and the gameplay inside SAP SuccessFactors Learning.

SAP SuccessFactors Learning Configuration for Gamification

SAP SuccessFactors Learning Gamification Settings

Property	Description
`gamificationEnabled`	Set to **`true`** to enable gameplay in SAP SuccessFactors Learning. Set to **`false`** to disable gameplay.
`autoGenerateGamificationUserID`	If you set to **`true`**, then when `gamificationEnabled` is also set to **`true`**, SAP SuccessFactors Learning automatically generates game user IDs for all users with the Post Gamification permission. If you set it to false, you must import game user IDs for users.
`leaderboardDisplayEnabled`	If you set to **`true`**, then users see a leader board in their *Achievements*. Leader boards foster competition among employees, so consider setting to **`false`** to downplay the competition or **`true`** to engage in competition.

Game Server Configuration for Gamification

Each game server is identified in brackets. For example, the Bunchball server is identified by the prefix `gamificationProviders[BUNCHBALL]` and the setting `gamificationProviders[BUNCHBALL].enabled` is the `enabled` setting for Bunchball.

Game Server Gamification Settings

Property	Description
`enabled`	Set to **`true`** to enable the game server. Set to **`false`** to disable it.
`name`	The name of the server. We preconfigure the names, so in most cases, you don't need to change it.
`label`	The label that controls the name of the game server as users and administrators see it. You can go to this label in *References* > *Manage Labels* to change its value. We don't recommend that you change this setting.

Property	Description
`apiURL`	This is the base URL that SAP SuccessFactors Learning connects to for the game server APIs. It's preconfigured, so you shouldn't need to change it.
`config.appKey`	This is the API key that identifies your calls in the server. For Bunchball, you can find your API key in the Bunchball Admin Console. If you're connecting to a sandbox environment in Bunchball, prefix your key with `Sandbox-`. If you're connecting to production, prefix your key with `Production-`.
`config.secretKey`	The API secret key that authenticates calls to the Bunchball server. You can find your secret key in the Bunchball Admin Console. The key is encrypted in SAP SuccessFactors Learning when you click *Apply Changes*.

23.4.9 Viewing Users and Administrators in Roles

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

Procedure

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

Results

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

Next Steps

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

- If it's an administrator role, you can assign the new role directly to the administrator in *System Administration* > *Security* > *Adminstrator Management*.

- If it's a learner (end user) role, then can fix the assignment profile.

Related Information

Placing Learning Users into Security Roles [page 872]
Assigning Roles to SAP SuccessFactors Learning Administrators [page 863]

23.4.10 Where to Read About Security Implementation

Security implementation in Learning is complex, so we have a separate guide to help you through its implementation.

If you're a customer system administrator, please engage with an expert to implement Learning security. You can read about Learning security implementation in a separate security implementation document.

23.4.11 Security Implementation of SAP SuccessFactors Learning

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

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

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

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

23.4.12 Detailed SAP SuccessFactors Learning Security Rules

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

Rules About Roles

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

Rules About Security Domains

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

Rules About Restrictions

- If a user is assigned to more than one role, the user receives the union of the access granted in the restriction tabs. Imagine that you have two roles in your system: "North American Learning Administrator" has access to entities in the North American security domain and "South American Learning Administrator" has access to entities in South American security domain. If you assign a learning administrator to both roles, then that administrator has access to both the North American and South American security domains.
- State restrictions don't cross over security domain group chain. For example:
  - Security Domain Group L contains Security Domains X and Y.
  - Security Domain Group M contains Security Domain Z
  - Role H contains Security Domain Group L for User Entities that are Active.
  - Role I contains Security Domain Group M for User Entities that are Inactive
  - Administrator R is assigned Role H and Role I
  - User 1 is Active and in Security Domain X
  - User 2 is Inactive and in Security Domain Y

- User 3 is Inactive and in Security Domain Z
- Administrator R has access to User 1 and User 3 – User 2 is in Security Domain Y (which the Admin could access through Administrator R > Role H > Security Domain Group L > Security Domain Y), but the user is inactive, which isn't allowed in the chain of access. Note that the state doesn't cross over the security domain group chain: The chain Administrator R > Role I > Security Domain Group M > Security Domain Z for inactive users is irrelevant to the other chain.

- When you assign an entity restriction, all functional and permission restrictions on that entity inherit the same restrictions. You can, however, change the restrictions on a per-function or per-permission basis. But if you change the functions, you can create a situation where you grant access to perform a function on an entity that is unreachable to a role. Extending the example above, if you changed the functional restriction to allow Role H to delete inactive users in Security Domain Group M, the setting is irrelevant. The only user the setting would affect is User 2, and Administrator R has no way of getting to that user.

23.4.13 The SAP SuccessFactors Learning PUBLIC Security Domain

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

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

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

23.4.14 LEARNER_SECURITY System Properties

This topic describes how the LEARNER_SECURITY system properties file affects your users' permission mapping. In most cases, this file doesn't apply to you. It applies only if you have remapped permissions for a customization.

The LEARNER_SECURITY includes permission mapping. The first section is a map of a URL to the permissions associated with the URL and the access restrictions for the permission. For example, workflowURLs.browseSubordinate.url=/user/employee/browseSubordinate is the "browse subordinate dashboard URL." It's associated with the permissions:

```
workflowURLs.browseSubordinateDashboard.workflows.AccessSubordinateDeadlineDashboard
workflowURLs.browseSubordinateDashboard.workflows.AccessSubordinateGoalStatusDashboa
rd
workflowURLs.browseSubordinateDashboard.workflows.AccessSubordinatePerformanceReview
StatusDashboard
```

Each is then mapped to an access string, for example:

```
...AccessSubordinateDeadlineDashboard=STUDENT Access Subordinate Deadline Dashboard
```

Each access string can then be used in the lower sections to affect the restricted user-side URLs when assuming the identity of another user:

```
userRestrictionWorkflows.AccessSubordinateDeadlineDashboard=STUDENT Access
Subordinate Deadline Dashboard
```

23.4.15 Manage Passwords and Identity in Platform

We are in the process of migrating all passwords and identity management to Platform.

For the time between Q3 2018 and 2H 2020, we support a few cases of native user login - users who can log in without going through SAP SuccessFactors Platform. These narrow cases are to allow customers time to migrate to new methods. All other cases of native user login aren't supported as of Q3 2018.

> **Note**
>
> Not supported means: we don't provide any guidance or help through customer support channels because the application isn't certified for unsupported configurations.

External Learning Users of Sites (Extended Enterprise)

We support users who have the shopping cart type of external. You can check users' shopping cart types by logging into SAP SuccessFactors Learning Administration and then going to *People* > *Users*. Find and open the user, and then go to *Finance*. You see the user's shopping account type.

Users with shopping account type of external are members of your extended enterprise. For example, if you have a dealership model, and employees of dealerships log on to their own learning sites to consume your training, those employees of the dealerships are **external users** and they have external shopping accounts. We address defects related to these types of users who have trouble signing in.

If a user has shopping account type of internal, we don't support that user's ability to log in natively. The user must log in through Platform. We don't address defects related to these types of users who have trouble signing in directly to Learning.

We don't address enhancements related to native learning users, internal, or external.

Learning Administrators

Because we have some cases, particularly during implementation, when administrators must sign in directly to Learning, we still support it, but it's discouraged. We encourage administrators to log in through standard means: SAP SuccessFactors Platform.

We don't support dual sign-in: Administrators who sometimes sign in through SAP SuccessFactors Platform and sometimes directly into Learning.

23.4.16 General Global Application Settings

These are the general global application settings in SAP SuccessFactors Learning (*System Administration* > *Configuration* > *Global Application Settings* > *General Settings* section).

This Field...	...Is Used as Follows
Currency	When you select a currency (for example, U.S. Dollar), the system uses it by default to support financial transactions including chargeback adjustments, order management, master inventory, cancellation policies, and account codes. Changing the default currency doesn't affect existing records that contain former currency attributes.
Percent Symbol	When you enter a default percent symbol (for example, %), the symbol appears after percentage values throughout the system.
Site Prefix	You can enter a site prefix, which is a positive, three-digit number that represents a server site.
Admin User ID	You can enter an administrator user ID when an end user withdraws from a class and the system enrolls another user (who was on the waitlist) into an open seat in the same class.
Introduction Panel ID	When you select an introduction panel ID, the introduction panel appears to administrators on the SAP SuccessFactors Learning Administration home page. The system provides one introduction panel ID by default, but you can also add new introduction panels (*System Administration* > *Application Administration* > *User Introductions*) to meet your business needs. The default panel ID for the new UI is DEFAULT_LEARNING_ADMINISTRATION_INTRO.
Curriculum Basis Date	When you select a curriculum basis date, the system sets that date by default on every item that you associate with a curriculum (*Learning Activities* > *Curricula* > *Contents*). The curriculum basis date defines the beginning of a time period that the system builds using initial or retraining assignment information. When a user completes an item, the item isn't due again until the end of the next period. Using the basis date, you can assign an item that is due once a quarter or once a year but allow the user to complete the item at any time during the quarter or year.

This Field...	...Is Used as Follows
Enable substitutes	When you select *Enable Substitutes*, the system enables item substitutes that users can complete to receive full credit for original items. You can add substitutes to an item on the *Substitutes* tab of the item record (*Learning Activities* > *Items* > *Substitutes*).
Completion of later Item revision grants credit for previous revision assignment	This setting determines whether completion of a later revision of a learning item grants completion credit for a previously assigned revision. When enabled, completion of a later revision automatically marks the previous revision as completed and removes it from the user's learning plan. This behavior applies to both free-floating items and items assigned through curricula. This setting does not apply when completion of the later revision is granted through substitute credit. Changes to this setting are not retroactive and apply only to completions recorded after the configuration change. Completions recorded prior to the change are not affected.
Show Legacy Configuration Changes	When you select *Show Legacy Configuration Changes*, the system shows and compares your legacy configuration changes against the default configuration (*System Administration* > *Configuration* > *System Configuration*).
AICC Max-Normal	New courses (learning items) get the AICC max normal value from *Global Application Settings* by default when you create new learning items. Individual courses can override the default. Imported AICC courses can set their max normal values in the CRS definition.
Capture Content/Exam Object score as Item grade when recording learning	If you select *Capture Content/Exam Object score as Item grade when recording learning* (*System Administration* > *Configuration* > *Global Application Settings* > *General Settings*), then the system automatically records the score a user received on a content object that is associated with an item, but only if you configured the content object to record a learning event when passed or failed (by selecting the *Record learning event when content passed* or *Record learning event when content failed* (*Learning Activities* > *Items* > *Online Content*). When the system records object score as an item grade, then the system makes that information (the content object score) viewable by users and administrators alike.

This Field...	...Is Used as Follows
Display "Launch in a new Browser Window" option for content objects	*Display "Launch in a new Browser Window" option for content objects* provides the option to allow content to be launched inline. • When selected, the *Launch in New Browser Window* checkbox displays for content objects and is selected by default. You can clear the checkbox at the content-object level to launch content inline. • When clear, content always launches in a new browser window. The *Launch in a New Browser Window* checkbox **doesn't** display for content objects.
Default setting for launch mode when importing content	This setting controls the default selection for *Launch in a New Browser Window* checkbox for the *Launch Mode* when importing online content. The *Launch Mode* option can be changed as needed when importing online content. The options for the *Default setting for launch mode when importing content* setting are as follows: • *Launch in a New Window* - Triggers the selection of the *Launch in a New Browser Window* checkbox for the *Launch Mode* when importing online content. • *Launch Inline* - Triggers the clearing of the *Launch in a New Browser Window* checkbox when importing online content.
Enable Guide Me Mode	If you select *Enable Guide Me Mode* in the General Settings area (*System Administration* > *Configuration* > *Global Application Settings*), then the system places another *Enable Guide Me Mode* in each administrator's preferences. If you select the *Enable Guide Me Mode* for your preferences, then the system allows you to choose *Use Guided Mode* when you choose a group of quick links on your home page. Typically, the purpose of using the guided mode is to provide less experienced administrators with a guided process for completing routine, multi-step actions.
Item Direct link should launch the latest active productionized revision of the item	When you select this checkbox and more than one active revision of the item exists, the system navigates the learner to the latest productionized revision of the item the learner has access to.

This Field...	...Is Used as Follows
Grant Credit for events completed the day before assignment date	SAP SuccessFactors Learning provides the option to allow users who have completed an assignment within 24 hours of a new assignment to get credit. This can be turned on using a new setting *System Administration* > *Configuration* > *Global Application Settings* > *Grant Credit for events completed the day before assignment date*. If you have users in multiple time zones, then *Grant Credit for events completed the day before assignment date* is useful for you. Without it, when the assigner is a day ahead of the assignee, completions wouldn't grant credit for the assignment because of time and date conversion.
Default Item Classification	You can choose an item classification as the default or choose to have no value defaulted, the **Blank** option, so the administrator must be selected during creation. The options are: • Online • Instructor-led • Instructor-led with online content • Other
Enable QR Codes	When selected, users can attend training with a "boarding pass" to their classes. The system emails a QR code as part of their enrollment notification. They can print it and bring it to class, where the instructor can scan the code and automatically record that user's participation. More configuration is required: enable vCalendar attachments. Go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail* and select *Enable Vcalendar attachments*. More configuration is required if you've customized your notifications. Go to *System Administration* > *Configuration* > *Notification Templates* to include the QR code syntax tag. If you're using default email notification templates, the QR code is automatically included.
Use Editor Content When Sending Email Notification	When selected, *Use Editor Content When Sending Email Notification* enables the What You See Is What You Get (WYSIWYG) email notification template editor in *System Administration* > *Configuration* > *Notification Templates*. It's a prerequisite to using the editor.
Task Checklist Preview is Available	When selected, users see the *Task Checklist* tab on the course details page for an item with a classification of *Other*. By default, this setting isn't selected.

This Field...	...Is Used as Follows
Prevent Resource Conflicts	When enabled, the setting prevents administrators and managers from registering classes that conflict with already scheduled resources, such as instructors, training rooms, and others. It ensures that the same resource is not assigned to multiple scheduled offerings occurring at the same date and time. When disabled, administrators and managers receive a conflict warning but can proceed with the registration if necessary.

23.4.17 Learning Global Application Settings

Global Application Settings are settings, applied globally for your Learning implementation.

You typically edit global application settings during implementation and then leave them unchanged until you next review your deployment. The most commonly reviewed global application settings are in Learning Administration, *System Administration* > *Configuration* > *Global Application Settings*, but there are other global application settings in other places in the application. For example, you can consider the system configuration global application settings or custom columns global application settings.

Related Information

General Global Application Settings [page 1088]
Learning Approval Process Global Application Settings [page 946]
Delegate Settings Global Variables [page 910]
Virtual Learning System Global Application Settings [page 1196]
Setting AICC Wrapper Confirmation Text [page 784]

23.4.18 Process for Enabling SAP SuccessFactors Learning Email Messages

To enable email messages in SAP SuccessFactors Learning, you configure the basics, you configure how email invitations work, and you configure email archiving.

Basic Configuration for Email Messages

Basic configuration for email messages includes turning on the system, making some behavioral choices, setting up automatic processes that manage the notifications, and deciding if you want to use email domain validation, specifically Domain Keys Identified Mail (DKIM).

Learning Invitation Configuration for Email Messages

Email invitation configuration includes how you want SAP SuccessFactors Learning to set calendar appointments for users for classes.

Archive for Email Messages

SAP SuccessFactors Learning offers you choices for archiving email that it sends. Choose an archiving option that matches your company policy.

23.4.18.1 Enabling Email Notifications in SAP SuccessFactors Learning

Enable email notifications in SAP SuccessFactors Learning so that Learning can send email messages about training and system information.

Prerequisites

We rely on a separate (Simple Mail Transfer Protocol) SMTP server to send email. The configuration of the SMTP server is done at the backend. You can also use the server we provide. If you plan to use your own, your configuration is more complex. You must, however, have an SMTP server identified **before** you enable the email notifications.

Context

You typically enable notifications during implementation and when you start a new instance.

> **Note**
>
> When you select a custom certificate for *Default Certificate Template for Items* and *Default Certificate Template for Programs*, email notifications are sent to users irrespective of the *Enable email* configuration in *Global Application Settings* > *Mail*. If you don't select a custom certificate, then email notifications are sent based on the *Enable email* configuration in *Global Application Settings* > *Mail*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.
2. Select *Enabled* in *Enable email*.

   > **Note**
   >
   > The SMTP server settings are handled at the backend.

3. Type the email addresses that administrators see as the sender in *Admin Email Notification* and that learners see as the sender in *User Email Notification*.

   For example, you can type **`noreply@<your company domain>`**.
4. In *Email Frequency*, type **`5`**.

   Email Frequency is the number of minutes that you want the application server to wait before it contacts the SMTP server to send notification messages.
5. In *Send email notification from* select *Select from list* and then type a comma-delimited list of email addresses.

   Select from list allows administrators to choose an address from one or more addresses that you provide and control. When administrators create ad-hoc notifications, Learning adds the email address of the administrator who is attempting to send the notification to the top of this list automatically, but they can select any one of the emails addresses you provide.

   > **Note**
   >
   > If you are using allow-list emails, you need to test to ensure that those emails are received. Administrators shouldn't use their own email addresses if they are not on the allow-list.

   - *Admin* forces administrators to use their own email addresses.
6. Choose *Apply Changes*.

Next Steps

Configure email invitations and email archiving.

Related Information

Enabling Email Archiving Inside SAP SuccessFactors Learning Learning [page 1122]
Masking Email Addresses from SAP SuccessFactors Learning System Email Notifications [page 1075]

23.4.18.2 Email Domain Validation Using Domain Keys Identified Mail (DKIM)

You can enable Domain Keys Identified Mail (DKIM) validation in SuccessFactors Learning. In order to use this feature you must have a verified email domain in SuccessFactors platform and your Learning instance must be sealed to a platform instance.

You enable email domain validation for Learning in *Learning Administration* > *System Administration* > *Configuration* > *Global Application Settings* > *Mail*. Once enabled, administrators will receive the following warning on any page where you can configure an email address used as a "from" address: "<email address> contains a domain NOT verified in *Admin Center* > *Manage Email Notifications* > *Manage Domains*. Therefore when Learning sends notifications using this address, the "From" address will be overwritten with the default address system@successfactors.com or system@successfactors.eu."

Whenever the "from" address is replaced by the system default, the application will use the "Reply-to" address that is configured in *Learning Administration* > *System Administration* > *Configuration* > *Global Application Settings* > *Mail* along with the original sender's email address.

> **Note**
>
> The domain validation is set to occur daily, by default. You can modify the frequency and check error logs of the current job on the *Verified Email Domain Synchronization* automatic process page. It is possible that changes made to verified domains in SAP SuccessFactors Platform won't be applied to your Learning instance until the next job run, based on the frequency set. You can select **View Job Details** to see the status of the validation jobs.

Email Domain Verification Reporting

Once you have enabled Email Domain Verification, you can run the Email domain verification report from the *Learning Administration* > *System Administration* > *Configuration* > *Global Application Settings* > *Mail* page to see the list of unverified domains in your Learning instance and the entity that the belong to.

Related Information

Scheduling Verified Email Domain Synchronization Automatic Job [page 1249]

23.4.18.3 Sending Virtual Learning Email Notifications from Administrator's Email Instead of Instructors

Send virtual learning email notifications from administrator's email instead of instructors to make virtual learning email notifications behave like all other email notifications and to hide instructor email addresses for privacy.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *Global Application Settings*.
2. Click *Mail*.
3. Select *Use Admin's email address for VLE email notifications*.
4. Click *Apply Changes*.

23.4.18.4 Overriding Individual Course or Class Calendar Attachments with Global Templates

Override individual course or class templates if you want SAP SuccessFactors Learning to ignore any calendar attachments in the course or class template and send the global calendar attachment instead.

Context

If you override individual course or class messages with global templates, then the system uses the **global** ICS attachment when it sends the notification: the legacy behavior **before** Q1 2017. If you do **not** override individual course or class messages with global templates, then each customized course or class notification gets its own ICS copy: the new standard behavior. If you do **not** override, then changes to the global ICS attachment leave individualized notifications unaffected.

> **Note**
>
> Overriding individual course or class calendar attachments with global templates is **not** best practice.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.
2. Select *Always use VCAL message from the Global templates*.

   Changes to the global ICS attachment change individualized notifications without warning.
3. Click *Apply Changes*.

23.4.18.5 Periodic SAP SuccessFactors Learning Reminder Email Notifications

SAP SuccessFactors Learning has automatic processes that periodically send reminder email notifications to users.

In most cases, SAP SuccessFactors Learning sends email notifications because of an event. For example, it sends notifications when users are enrolled in training. But SAP SuccessFactors Learning also uses automatic processes to send periodic notifications to users to remind them to do something, to send a newsletter, and so on. You configure the periodic reminders as automatic processes so that you can control how often they send their messages.

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

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

Context

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

Procedure

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

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

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

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

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

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

Setting	Description
Notify Manager when user successfully completes an item	If you select *Notify Manager when user successfully completes an item*, notifies managers when a course is successfully completed by one of their employees.

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

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

Next Steps

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

Related Information

Creating Automatic Notifications to Learners When Course Assignments Change [page 1099]

23.4.18.5.2 Creating Automatic Notifications to Learners When Course Assignments Change

Create automatic notifications to learners when course assignments change so that when learners' course assignments change, they receive a notification that they have a new assignment and their supervisors stay current on their assignments.

Prerequisites

The bulk of the configuration for automatic notifications when learners' course assignments change occurs in *System Administration* > *Application Administration* > *User Settings* > *Learning Plan Email Notification Settings*. Before you create the automatic notifications, configure how you want the notifications to behave.

If you want to customize the message that SAP SuccessFactors Learning sends for external verification reminders, change the `ApmStudentLearningPlanNotification` template for learners and the `ApmSupervisorLearningPlanNotification` template for supervisors.

Context

The learning plan notification process sends notifications to learners when a course from the learner's learning plan is added, removed, or modified. It sends notifications to **supervisors** when a learning event is recorded for one of their direct reports. SAP SuccessFactors Learning notifies supervisors even if the item isn't on the learner's learning plan.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Learning Plan Email Notification*.
2. In *Schedule*, set the period that the automatic process runs to send the reminder.
3. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]
Controlling When Learners are Notified of Changes to their Learning Assignments [page 1097]
Creating Prompt for Users to Complete Courses That Are Near the Due Date [page 1100]

23.4.18.5.3 Creating Prompt for Users to Complete Courses That Are Near the Due Date

Create an automatic reminder for users when they need to take action on their course assignments so that SAP SuccessFactors Learning prompts them to complete their assignments when they near their due date.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Automatic Processes* > *Learning Expiration Email Notification*.
2. In *Schedule*, select *Schedule This Process* and then set a schedule for it to run.

> **Note**
>
> We recommend setting the schedule based on the amount of data you intend to process on a regular basis. This helps prevent load errors. If you experience issues with the APM timing out, schedule the automatic process to run more frequently (e.g. on a daily basis).

3. In *Email Recipients*, decide who should receive the learning expiration notification.

When you select this...	...The following recipients get the notification
User	The user whose learning is expiring within the threshold of days. This is the user responsible for completing the expiring learning content.
Manager	The supervisors of the user whose training is expiring.

> **Note**
>
> The administrator whose email address is provided in the Learning Expiration Notification APM also receives email notifications to alert them of the job's completion status.

4. To enable a separate email template for overdue items, select *SuccessFactors Overdue Learning Notification*.

   This setting can be confusing because it looks like you can clear *SuccessFactors Overdue Learning Email Notification* to disable overdue learning notifications. But that isn't how it works. Instead, when you select it, it simply forces the Learning Expiration process to use `ApmTrainingOverdue` for overdue assignments and `ApmTrainingExpiration` soon-to-be overdue assignments. If you clear it, then both overdue and soon-to-be-overdue assignments use the `ApmTrainingExpiration` template.

5. In *Threshold*, type the number of days into the future that the process should check for a next action date (for curricula) or a required date (for learning items).

   For example, if you type **`30`** in *Threshold*, then when the Learning Expiration automatic process next runs, it looks 30 days into the future. If it finds any users with courses due in the next 30 days, it sends the notification.

6. In *Reminder Period*, type the number of days that the process should wait to send a reminder.
   For example, if you type **`30`** in *Threshold* and **`7`** in *Reminder Period*, then a user receives up to four notifications (one message every 7 days for 30 days before the required or next action date) that remind them to complete the item. That is, if you run the automatic process every day, then the user receives four reminders; if you run the process every 2 weeks, then the user receives two reminders.

> **Note**
>
> The reminder date and time are calculated when the Learning Expiration Email Notification automatic process runs and are based on the reminder period associated with the automatic process setup (or item setup, if that was overridden). Changes to the reminder period aren't considered until after the previously set reminder date and time have passed.

Learning Expiration Notification APM User Cases

APM Schedule	Threshold	Reminder	Assignment Date	Required Date	APM Run Date and Time	Record Picked Up By APM?	Next User Reminder Date and Time	Next APM Run Date and Time	Record Picked Up By APM?	Next User Reminder Date

Monthly	30	7	01 JAN 2023 08:00 AM	01 FEB 2023	15 JAN 2023 03:00 AM	Yes	22 JAN 2023 03:00 AM	15 JAN 2023 03:00 AM	Yes	22 JAN 2023 03:00 AM
Weekly	30	7	01 JAN 2023 08:00 AM	01 FEB 2023	02 JAN 2023 03:00 AM	Yes	09 JAN 2023 03:00 AM	09 JAN 2023 03:00 AM	Yes	16 JAN 2023 03:00 AM
Daily	30	7	01 JAN 2023 08:00 AM	01 FEB 2023	01 JAN 2023 03:00 AM	Depends on the Required Date time-stamp. The required date should be **less than or equal to** the APM time-stamp plus threshold.	08 JAN 2023 03:00 AM	02 JAN 2023 03:00 AM	No	08 JAN 2023 03:00 AM

> **Note**
>
> - Times used as examples in the table are in UTC (database time zone). Please consider your current system preferences when troubleshooting.
> - Users have until the end of the day (i.e. 11:59 PM) on the Required Date to complete the course before it is considered overdue.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]
Propagating Learning Expiration Automatic Process Default Settings to All Active Learning Items [page 1193]
Overriding Learning Expiration Notification at the Learning Item Level [page 1180]

23.4.18.5.4 Creating an Automatic Reminder for Learners to Take Action on External Verification

Create an automatic reminder for users to take action on external verification so that learners remember to submit their external learning events to their supervisors for verification to get credit for their completion.

Prerequisites

If you want to customize the message that SAP SuccessFactors Learning sends for external verification reminders, change the `ExternalVerificationReminder` template.

Context

This reminder applies if you're using the external event system, which is often known in U.S. Federal Government customers as the SF-182 process. The U.S. Federal Government has a strict system for requesting, completing, and getting credit for external events.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *External Learning Verification Approval Reminder*.
2. In *Schedule*, set the period that the automatic process runs to send the reminder.
3. In *Maximum Notifications*, set the times that a user should be reminded about an external event before the process stops notifying them.

   If you set *Maximum Notifications* to **3**, then the process sends three reminders to a user about a particular event and then stops sending reminders.
4. In *Reminder Period*, type the number of days that the process should wait before sending another reminder.

   If you set *Reminder Period* to **5**, the notification process waits five days before sending a follow-up reminder to the same user about the same external event.
5. Click *Apply Changes*.

Results

On the schedule you set, the external verification reminder automatic process sends out email notifications if it finds a user with an external learning event that has a completion date in the **past** but the user hasn't yet requested for the supervisor to verify the learning event.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.18.5.5 Creating an Automatic Reminder for Courses in Jam Groups

Create an automatic process to send a notification when an administrator sets one of the available invitations while associating an item with a Jam group.

Prerequisites

If you want to customize the message that SAP SuccessFactors Learning sends for external verification reminders, change the `JamGroupInvitation` template.

Context

The Item Jam group notification automatic process sends notifications when an administrator sets one of the available invitation settings while associating an item with a Jam group (*Learning Activities* > *Items* > *Jam Groups*).

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Send Jam Groups Invitation*.
2. In *Schedule*, set the period that the automatic process runs to send the reminder.
3. Click *Apply Changes*.

Related Information

Automatic Process Templates [page 1146]
Scheduling Learning Automatic Processes [page 1245]

Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.18.5.6 Scheduling Automatic Email Notifications for Upcoming Classes

The Class Delivery process sends notifications to remind users that they're registered for an upcoming class.

Context

If you want to customize the message that SAP SuccessFactors Learning sends for external verification reminders, change the `ApmInstanceDelivery` template.

Procedure

1. Go to *Learning Administration* > *System Administration* > *Automatic Processes* > *Upcoming Class Reminder Email Notification* .
2. In *Schedule*, choose *Schedule This Process* to enable the automatic process to run.
3. Choose the period for running the process:

Select...	To run the process...
Daily	Every 24 hours. It's the default selection.
Weekly	One day every week. You can select the day that you want to run it in the *Day* list.
Monthly	Every month. You can select the date of the month that you want to run it in the *Date* list.

4. In *Time of Day*, set the time of day for the process to run.
5. Set the time zone for the scheduled time.
6. In *Email Address*, type the address of the learning administrator who is setting up the automatic process and who wants to be notified about the success or failure of the automatic process.
7. In the *Email Notification Defaults* section, choose the recipients:
   - Select *User* to notify learners about upcoming classes.
   - Select *Manager* if managers need reminders for their teams' training.
8. In *Threshold*, enter the number of days in advance of the class to send reminders.

> → Remember
>
> - Set the threshold to a value lower than the interval at which the automatic process runs. For example, if you set the threshold to 7 days and have scheduled the process to run only once a month, the process

can miss the 7-day window. As a result, users don't receive the reminder 7 days before their training, as intended. Instead, they receive the reminder only when the process runs.

- Reminder email notifications are sent only once for each class, based on the schedule. For example, if the number of days remaining before the class start date is less than the defined threshold (say, 1 day remaining with a 3-day threshold), newly registered users will not receive reminder email notifications, as it has already been sent to earlier registrants.

9. Choose *Apply Changes*.

Results

Email reminders are sent to recipients for the classes that they're registered for.

Next Steps

Run the *Class Data* report to check the **Reminder Sent** column of the report and verify if the reminder has already triggered for that class.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.18.5.7 Creating an Automatic Reminder for Expiring Free-of-Charge Subscriptions to SAP SuccessFactors Learning

Create an automatic reminder for expiring subscriptions if you use Learning commerce features and paid subscriptions to Learning.

Context

Organizations can pay a subscription fee so that their users can access learning content for some period of time. When the subscription nears its end, the process notifies subscription owners that their subscription is nearing its end.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Admin* > *Automatic Processes* > *Free-of-Charge Subscription Expiration Email Notification*
2. Schedule the automatic process using the fields in the *Schedule* area.
3. In *Send email notification to Free-of-Charge Subscription Owner prior to end date*, set the time that the subscription owners should be notified before the subscription ends.

   If you set this to one month, then the process notifies subscription owners that their subscription end one month before the end of the subscription.
4. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.18.5.8 Creating an Automatic Notification for Learners who Requested a Class

Create an automatic notification for learners who requested a class so that when administrators add a scheduled offering for a course that users have requested, the users receive notification that their request was met.

Prerequisites

This automatic notification is part of a larger system that allows users to create requests. To send notifications with this process, enable the request schedule feature, add contact info for learning items, add minimum registration to learning items, and enable the request processing jobs.

Context

When users can't find a scheduled offering that they need, they can request it. A request tells learning administrators that they have a user who needs a class, but it isn't scheduled for a time that the user can attend. The administrators can look at the requests and decide to add a class.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Requested Class Availability Email Notification*.
2. Schedule the automatic process using the fields in the *Schedule* area.
3. Click *Apply Changes*.

Results

When the automatic process runs, it looks for:

- New learning offerings that have been added to the catalogs of users who have made requests.
- The start date of the offerings that have been added: are they before the need by date of the request. The need by date is the date that the user needs to take the course: it's the user's deadline. So, the automatic process looks to see if the offering helps users meet their deadline.
- The offerings are in the users' geographic regions. Some companies do not use regions. If the user does not have a region, the automatic process skips this step. The automatic process looks for regions so that the offering is close to the user. Users submit requests because they do not have travel budget and so they need an offering that meets their deadline in their region.

When a user with a request has offerings that meet the criteria, the automatic process sends them an email. The email includes the course name (learning item title), it includes the details of the offering, and it provides a link to register for the offering.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.18.5.9 Creating a Recommendations Email Newsletter

Create a recommendations email newsletter to email a list of recommended courses to users.

Prerequisites

Before you set up the recommendations newsletter, enable users to receive and make peer to peer recommendations.

Context

In SAP SuccessFactors Learning, users can make recommendations to their peers and administrators can make recommendations to users through assignment profiles. For example, if users finished a course and it was very helpful to them, they can recommend it to peers. The Recommendations Newsletter compiles the peer and administrator recommendations for a user, but does **not** make the recommendations.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Recommendations Newsletter*.
2. Schedule the automatic process using the fields in the *Schedule* area.
3. In *Email Notification Interval*, type a number of days that the newsletter rests (does **not** go to users).

   The notification interval defines a time when a user won't receive the recommendations newsletter. It is a “rest period” between notifications. You define it in days, so you can think of this as the "days between recommendations." Setting a good interval helps you avoid overexposing your users to recommendation emails.

   If you type **7**, then users who have already received an email do not receive another one for seven days. After seven days, on the next run of the process, the user **does** receive an email.
4. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.4.18.5.10 Creating Automatic Account Reminders for User-Created Accounts

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

Prerequisites

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

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

Procedure

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

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

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

Example

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

23.4.18.5.11 Sending Periodic Digests of Enrollments to Learning Supervisors

Send periodic digests of enrollments to learning supervisors (including alternate supervisors) so that they aren't overwhelmed with individual notifications but instead receive a digest of the individual notifications.

Prerequisites

Periodic digests for supervisors use the `ApmEmployeeEnrollmentDigest` notification template. Although you don't need to customize the notification, if you do customize it, do so before configuring the process.

Context

> **Note**
>
> The Periodic digests are restricted to 500 entries to an email. This includes all registrations, including the ones that the supervisors themselves added.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Manager Email Notifications for Enrollment Digest*.
2. Schedule the automatic process using the fields in the *Schedule* area.
3. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]

23.4.18.6 Enabling Custom Organization Email Notifications in SAP SuccessFactors Learning

Enable customized headers and footers in SAP SuccessFactors Learning email notifications if you use organizations and you want to brand each organization's notifications differently.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Open *LMS_ADMIN*.
3. Find `enableNotificationHeaderFooter` and set it to **`true`**.

   When users are a part of an organization, they see the organization's header and footer, which you define in *People* > *Organizations*.
4. Find `useOrgEmailAsFromForNotifications` and set it to **`true`**.

   When users are a part of an organization, they see the organization's email address as the sender of the email. You define the email in *People* > *Organizations*.

Next Steps

Go to each organization in *People* > *Organizations* and add the custom header and footer and verify that all organizations have an email address.

Adding Custom Notification Information to SAP SuccessFactors Learning Organizations [page 1113]
Add custom notification information to SAP SuccessFactors Learning organizations so that users' notifications about their learning appear to come from the organization they recognize instead of the broader company.

Inheritance in Customized Learning Organization Email Notifications [page 1114]
When you customize Learning organization email notifications, you can customize the highest organization record in the organization tree so that the update applies to all its sub-organizations.

23.4.18.6.1 Adding Custom Notification Information to SAP SuccessFactors Learning Organizations

Add custom notification information to SAP SuccessFactors Learning organizations so that users' notifications about their learning appear to come from the organization they recognize instead of the broader company.

Prerequisites

Enable custom organization email notifications in SAP SuccessFactors Learning.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *People* > *Organizations*.
2. Find and open the organization that you want to customize.
3. Go to *Summary*.
4. In *From Email Address*, type the email address that users of this organization should see as the sender when they receive Learning notifications.
5. In *Notification Header* and *Notification Footer*, add the header and the footer text that users should see in the message body when they receive email notifications and are members of this organization.

   > **Note**
   >
   > - Always add both a header and a footer.
   > - If *Notification Header* and *Notification Footer* are empty, the notification system ignores them and follows the hierarchy rules.
   > - Be strict with your HTML usage: wrap your paragraphs in paragraph (`<p> </p>`) tags. If you don't include a tag to separate your header and footer from the body of the message, it won't separate from the body of the message.

6. Click *Apply Changes*.

Next Steps

Test your customizations by sending email to test users in different organization.

Task overview: Enabling Custom Organization Email Notifications in SAP SuccessFactors Learning [page 1112]

Related Information

Inheritance in Customized Learning Organization Email Notifications [page 1114]

23.4.18.6.2 Inheritance in Customized Learning Organization Email Notifications

When you customize Learning organization email notifications, you can customize the highest organization record in the organization tree so that the update applies to all its sub-organizations.

Organizations are hierarchical, so the header and footer that users see could come from the users' parent organizations. When sending a notification, the system starts looking for headers and footers at the users' lowest organization and then works up the hierarchy until it finds a custom header and footer. When it finds **either** a header or footer, it stops looking and uses the header and footer at the current organization level, even if one is populated and the other is blank (for example if the header is populated with text and the footer is blank, the system stops going up the hierarchy, and sends the blank footer).

> → Tip
>
> When testing, if you do not see the header and footer you expect, check to see if you configured header or footer on a child organization.

Parent topic: Enabling Custom Organization Email Notifications in SAP SuccessFactors Learning [page 1112]

Related Information

Adding Custom Notification Information to SAP SuccessFactors Learning Organizations [page 1113]

23.4.18.7 Learning Invitations Email Configuration

Email invitation configuration includes how you want SAP SuccessFactors Learning to set calendar appointments for users for classes.

In SAP SuccessFactors Learning, you can choose how the notification system sends calendar invitations for classes. For example, when SAP SuccessFactors Learning sends an enrollment notification to learners, it can send an .ics attachment or a calendar invitation so that learners can add the course to their calendars.

Enabling Calendar Invites in SAP SuccessFactors Learning Notifications [page 1115]
: Enable calendar invites for SAP SuccessFactors Learning notifications if you want recipients to receive standard calendar invites instead of iCal attachments.

Enable Calendar Attachments for SAP SuccessFactors Learning Notifications [page 1116]

Enable calendar attachments instead of calendar invites in SAP SuccessFactors Learning notifications if you can't send calendar invites but you want to allow users to create appointments not their calendars for training.

Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications [page 1117]
: Suppress informational ICS attachments for supervisors when users receive class notifications so that managers can, if they want, add their employee's learning event to their calendars.

Enabling QR Codes to Record Attendance [page 1118]
: 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.

Rules for Calendar Invites and ICS Attachments [page 1119]
: Understand the rules for when the system sends calendar invites or ICS attachments in notifications so that you can design your notifications correctly.

23.4.18.7.1 Enabling Calendar Invites in SAP SuccessFactors Learning Notifications

Enable calendar invites for SAP SuccessFactors Learning notifications if you want recipients to receive standard calendar invites instead of iCal attachments.

Context

Before you enable calendar invites, check the rules to make sure that calendar invites will work for you. Rules for Calendar Invites and ICS Attachments [page 1119]

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.
2. If it isn't already selected, select *Enable Vcalendar attachments*.
3. Select *Send Vcalendar attachments as Calendar Invite*.
4. Click *Apply Changes*.

Task overview: Learning Invitations Email Configuration [page 1114]

Related Information

Enable Calendar Attachments for SAP SuccessFactors Learning Notifications [page 1116]
Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications [page 1117]
Enabling QR Codes to Record Attendance [page 1118]
Rules for Calendar Invites and ICS Attachments [page 1119]
Enabling Email Notifications in SAP SuccessFactors Learning [page 1093]
Rules for Calendar Invites and ICS Attachments [page 1119]

23.4.18.7.2 Enable Calendar Attachments for SAP SuccessFactors Learning Notifications

Enable calendar attachments instead of calendar invites in SAP SuccessFactors Learning notifications if you can't send calendar invites but you want to allow users to create appointments not their calendars for training.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail* .
2. Select *Enable Vcalendar attachments*.
3. Select *Automatically send Class Enrollment Update Notification on Time Slot deletion*.

   If you don't select *Automatically send Class Enrollment Update Notification on Time Slot deletion*, then users manage their deletions manually. You experience the behavior as it was before Q1 2017.

   If you delete a segment of a class (standard or VLS), the system sends out a deletion ICS or calendar invite.
4. Click *Apply Changes*.

Task overview: Learning Invitations Email Configuration [page 1114]

Related Information

Enabling Calendar Invites in SAP SuccessFactors Learning Notifications [page 1115]
Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications [page 1117]
Enabling QR Codes to Record Attendance [page 1118]
Rules for Calendar Invites and ICS Attachments [page 1119]

23.4.18.7.3 Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications

Suppress informational ICS attachments for supervisors when users receive class notifications so that managers can, if they want, add their employee's learning event to their calendars.

Prerequisites

Informational ICS attachments apply when you send calendar invites. To check if you're sending calendar invites, go to *System Administration* > *Configuration* > *Global Application Settings*, click *Mail* and then look at *Send Vcalendar attachments as Calendar Invite*. If it's selected, then you're sending calendar invites.

Context

If you're sending calendar invites, users receive an appointment request (for example a calendar request in Microsoft Outlook). You might also want to send an .ics file to the users' supervisors so that they can add the appointment to their calendar without being invited to the training event.

> **Note**
>
> The informational ICS is sent with class enrollment notifications only.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *Global Application Settings*.
2. Click *Mail*.
3. Clear *Suppress Informational ICS Attachments for Notifications*.
4. Click *Apply Changes*.

   > **Note**
   >
   > The ICS attachment is suppressed for VLS segments when Class Enrollment notification sent to users when *Suppress Informational ICS Attachments for Notifications* is enabled. The user only receives the Calendar Invite for the VLS segment through the VLE Enrollment Notification.

Task overview: Learning Invitations Email Configuration [page 1114]

Related Information

Enabling Calendar Invites in SAP SuccessFactors Learning Notifications [page 1115]
Enable Calendar Attachments for SAP SuccessFactors Learning Notifications [page 1116]
Enabling QR Codes to Record Attendance [page 1118]
Rules for Calendar Invites and ICS Attachments [page 1119]

23.4.18.7.4 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: Learning Invitations Email Configuration [page 1114]

Related Information

Enabling Calendar Invites in SAP SuccessFactors Learning Notifications [page 1115]
Enable Calendar Attachments for SAP SuccessFactors Learning Notifications [page 1116]
Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications [page 1117]
Rules for Calendar Invites and ICS Attachments [page 1119]

23.4.18.7.5 Rules for Calendar Invites and ICS Attachments

Understand the rules for when the system sends calendar invites or ICS attachments in notifications so that you can design your notifications correctly.

These rules apply when you send calendar invites and ICS attachments with notifications. You control some of this with the *Send Vcalendar attachments as Calendar Invite* in *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.

Rules for Calendars and Notifications

Condition	Learning Response
Virtual Learning Service (VLS) course segments are created	If you select *Send Vcalendar attachments as Calendar Invite*, then the VLS segment notification is sent as a calendar invite and the class notification is sent as an ICS attachment. The class notification remains an ICS attachment because we don't want the client to overwrite the segment with the class or the other way around. If you don't select *Send Vcalendar attachments as Calendar Invite*, then both are sent as ICS attachments.
Segments (standard or VLS) are deleted	Calendar invite cancellations or ICS cancellations are sent depending on how you set *Send Vcalendar attachments as Calendar Invite*. If you select it, then calendar invite cancellations are sent. If you clear it, then ICS cancellations are sent. Additionally, you must select *Automatically send Class Enrollment Update Notification on Time Slot deletion* to enable this.

Parent topic: Learning Invitations Email Configuration [page 1114]

Related Information

Enabling Calendar Invites in SAP SuccessFactors Learning Notifications [page 1115]
Enable Calendar Attachments for SAP SuccessFactors Learning Notifications [page 1116]
Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications [page 1117]
Enabling QR Codes to Record Attendance [page 1118]
Enabling Email Notifications in SAP SuccessFactors Learning [page 1093]

23.4.18.8 Email Notification Archiving in SAP SuccessFactors Learning

SAP SuccessFactors Learning offers you choices for archiving email that it sends. Choose an archiving option that matches your company policy.

Email archiving in SAP SuccessFactors Learning is useful for troubleshooting and for traceability. You can see the messages that were sent from the notification system. We understand, however, that archiving policies differ from customer to customer. Some organizations are more strict about archiving personal communication and some are more lenient. We offer you choices to fit your policy.

Check your company policies to learn what they allow and prevent for special archiving of emails sent to users about, for example, their learning activities.

- If your policy prevents any special email archiving, you can configure SAP SuccessFactors Learning so that it does **not** archive any email notifications except in standard ways. For example, users can archive the messages that they receive.
- If your policy allows email archiving but requires you to stored on **your** email servers, then choose Blind Carbon Copy (BCC) archiving.
- If your policy allows email archiving and allows it within third parties like SAP SuccessFactors, you can choose to archive within SAP SuccessFactors.

23.4.18.8.1 Preventing Email Notification Archiving

Prevent email notification archiving if you don't need the archive for troubleshooting or if your company policy doesn't allow email archives.

Context

Check your company policies to learn what they allow and prevent for special archiving of emails sent to users about, for example, their learning activities.

- If your policy prevents any special email archiving, you can configure SAP SuccessFactors Learning so that it does **not** archive any email notifications except in standard ways. For example, users can archive the messages that they receive.
- If your policy allows email archiving but requires you to stored on **your** email servers, then choose Blind Carbon Copy (BCC) archiving.
- If your policy allows email archiving and allows it within third parties like SAP SuccessFactors, you can choose to archive within SAP SuccessFactors.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.
2. Clear *Enable Email Archiving*.

   When you clear *Enable Email Archiving*, we don't archive any email messages. So, there are no messages to purge.
3. Choose *Apply Changes*.

23.4.18.8.2 Enabling BCC Email Archiving in SAP SuccessFactors Learning

Enable BCC email archiving in SAP SuccessFactors Learning so that Learning to keep a record of the information that you sent to users in email notifications and to keep it on your email servers as opposed to in SAP SuccessFactors Learning.

Prerequisites

You archive mail to an email address that you control. Ask your company Information Technology (IT) team to create an email address for you for the purpose of archiving the email messages that go to users. You can tell your

IT team that it needs standard archiving and limiting rules to delete messages after a period of time and to keep the mailbox below a set size.

Context

Your organization might have a policy that data must be purged on an interval. Check your policy to see if you must purge the data on a specific interval.

Check your company policies to learn what they allow and prevent for special archiving of emails sent to users about, for example, their learning activities.

- If your policy prevents any special email archiving, you can configure SAP SuccessFactors Learning so that it does **not** archive any email notifications except in standard ways. For example, users can archive the messages that they receive.
- If your policy allows email archiving but requires you to stored on **your** email servers, then choose Blind Carbon Copy (BCC) archiving.
- If your policy allows email archiving and allows it within third parties like SAP SuccessFactors, you can choose to archive within SAP SuccessFactors.

Procedure

1. Go to SAP SuccessFactors Learning learning administration and then go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.
2. Select *Enable Email Archiving*.
3. Select *BCC Address For Archiving* and then type the address that the IT organization gave you in the text box.

> **Note**
>
> This field supports only one email address.

23.4.18.8.3 Enabling Email Archiving Inside SAP SuccessFactors Learning Learning

Automatically purge the SAP SuccessFactors Learning email archive to keep your application clean of past email notifications and data.

Context

Your organization might have a policy that data must be purged on an interval. Check your policy to see if you must purge the data on a specific interval.

Check your company policies to learn what they allow and prevent for special archiving of emails sent to users about, for example, their learning activities.

- If your policy prevents any special email archiving, you can configure SAP SuccessFactors Learning so that it does **not** archive any email notifications except in standard ways. For example, users can archive the messages that they receive.
- If your policy allows email archiving but requires you to stored on **your** email servers, then choose Blind Carbon Copy (BCC) archiving.
- If your policy allows email archiving and allows it within third parties like SAP SuccessFactors, you can choose to archive within SAP SuccessFactors.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Configuration* > *Global Application Settinngs* > *Mail*.
2. Select *Enable Email Archiving*.
3. Select *Purge Emails older than*, and then type a number of months that SAP SuccessFactors Learning retains email notifications before they are purged.

   For example, if you type **2**, then we purge any emails from the archive that are older than two months.

Next Steps

Check the batch site of the purge. Go to *System Administration* > *Configuration* > *System Configuration* and then open *LMS_ADMIN*. Find `emailArchivePurgeBatchCount` and make sure that it is set to the default value.

23.4.19 Customizing Notifications in the Notification Editor

Use the notification editor to edit the system notifications that users receive.

Prerequisites

Enable the notification editor. Enabling the Rich Text Learning Notification Editor [page 1129]

Context

SAP SuccessFactors Learning sends notifications to users about learning events, enrollment, and so on. When you first implement SAP SuccessFactors Learning, it includes default notifications. You can edit those notifications if you need to customize them for your business.

> **Note**
>
> By default the notification template source code does not have font type or size specified. You should modify these values when customizing the template. If the default text is not updated to include font type or size, it will default to the value set on the external mail client that receives it.

Procedure

1. Go to *System Administration* > *Manage Email Notifications* > *Email Notification Templates*, find, and open the notification you want to edit.

   Searching for Notification Templates [page 1124]
2. Click *Messages*.
3. Click *Launch Editor*.

Related Information

Editing and Formatting Notification Text [page 1125]
Adding Dynamic Content to Email Notifications [page 1127]
Adding an Attachment to SAP SuccessFactors Learning Notifications [page 1128]
Inserting Direct Links into Notifications [page 1128]

23.4.19.1 Searching for Notification Templates

Search for notification templates when you want to edit the email messages that SAP SuccessFactors Learning sends.

Procedure

1. Look at the list of notifications to find the name of the template that you want to edit.

   Email Notification Template Groups in SAP SuccessFactors Learning [page 1145]
2. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Manage email* > *Email Notification Templates*.

3. Use the search menu to find the template you want to edit.

Next Steps

Edit the notification template.

Related Information

Customizing Notifications in the Notification Editor [page 1123]

23.4.19.2 Editing and Formatting Notification Text

You can edit the subject and body of any SAP SuccessFactors Learning notification using plain text and then format it with HTML.

Prerequisites

This process describes how you add and format text with the rich text notification editor. If you haven't yet enabled it, then you can use the legacy notification editor. We recommend that you enable the rich text notification editor.

To edit the text, first search for and find the notification that you want to edit, and then open it in the notification editor. Customizing Notifications in the Notification Editor [page 1123]

Context

When customizing notification messages, most customers can change a little text or format the text slightly. You might, for example, want to add a link to your learning system or you might want to add a tag line. Otherwise, you can use the rest of the notification in its default form.

Procedure

1. In the list of languages, select the language that you want to edit.

   Many companies support users of multiple languages. If you support multiple languages, you should consider translation as part of your effort. You can send the text that you type to a translator who can change the text for you. When the translator returns the text, you can switch your language and paste the text into the *Body* in the right place.

> **Note**
>
> If you're accustomed to the legacy editor, you might think that you're changing labels on the back end. But the new notification editor doesn't change labels. You are, therefore, immune to upgrades overwriting your customizations.

2. In *Subject*, change the subject for the recipient.
3. In the *Body* section, edit the text.
4. To format the text, select it and use one of the formatting buttons to change its appearance.

Related Information

Enabling the Rich Text Learning Notification Editor [page 1129]

23.4.19.3 Searching the list of supported tags for any SAP SuccessFactors Learning Notifications Template

Search what tags are supported in a particular notification template.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Manage Email*.
2. Search for the notification template for which you wish to see the supported tags.
3. Click *Edit* or *View*.
4. Go to *Messages* and click *Syntax Tags*.

Results

You'll now be able to see the list of tags supported for that particular notification template.

23.4.19.4 Adding Dynamic Content to Email Notifications

Add dynamic content to email notifications to pull in data that applies to the particular email notification as opposed to boilerplate that applies to all recipients and every email notification.

Prerequisites

This process describes how you add dynamic content with the rich text editor for email notifications. If you haven't yet enabled it, then you can use the legacy editor. We recommend that you enable the rich text editor.

To edit the text, first search for and find the email notification that you want to edit and then open it in the email notification editor. Customizing Notifications in the Notification Editor [page 1123]

Context

You often want to send dynamic content in an email notification message. For example, if you want to send an email notification that contains a list of learning items that have met the minimum threshold for scheduling a course, you want your email notification to include a list of those learning items. The list is dynamic: it changes every time the email notification is sent.

To send dynamic content, you use tokens. They're placeholders for information that originates from the database. For example, if you include the "<&END-DTE>" token ID in an email notification template, then the actual end date of the activity replaces the token ID when SAP SuccessFactors Learning Administration stores the email notification message in the PA_MAIL table.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Manage Email* > *Email Notification Templates*.
2. Search and find the e-mail template that you want to modify.
3. Choose *Edit* to modify the required e-mail template from the search results list.
4. Go to *Messages* and choose *Launch Editor*.
5. In *Body*, place your cursor where you want to insert the dynamic text.
6. Choose *Edit Syntax Tag* to find the token that you want to insert and click it.

   The set of tokens for any one email notification is set at the application level and you can't change it.
7. To remove a token, click ⊗ *the close button* for the token.

Related Information

Enabling the Rich Text Learning Notification Editor [page 1129]

23.4.19.5 Adding an Attachment to SAP SuccessFactors Learning Notifications

Add attachments to notifications when you want the email messages that SAP SuccessFactors Learning sends to have an attachment.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Manage Email* > *Email Notification Templates*.
2. Find the notification template that needs the attachment.

   Searching for Notification Templates [page 1124]
3. Go to *Attachments*.
4. Add the information in the section and then click *Choose File* to upload the file and then click *Add*.

   For each attachment, you must add a unique attachment ID, and the path to the attachment must be accessible to SAP SuccessFactors Learning Administration. The attachment can't exceed 1 MB.

23.4.19.6 Inserting Direct Links into Notifications

Insert direct links into SAP SuccessFactors Learning notifications so that you can direct recipients to a specific place in the application.

Context

Direct links are useful if you want your notification to take a user to a specific place in SAP SuccessFactors Learning. When you use direct links, you don't compromise system security. Users must log in if they aren't logged in already, and they can access only the sections of the user interface that their permission restrictions allow.

You can insert a hyperlink into a notification so that users can directly access certain locations in the user interface (after they have provided logon information, if they aren't already logged on). To ensure that you use the correct URL for the link, we recommend that you generate a direct link () that you can paste into the notification.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *System Management Tools* > *Generate Direct Link*.
2. Build the direct link that you want to insert into the notification and then copy the link.
3. Go to *System Administration* > *Manage Email* > *Email Notification Templates*.
4. Find the notification that you want to edit, open it, and then go to *Messages* and click *Launch Editor*.
5. Place your cursor in the body where you want to add the link and then click (*Insert/edit link*).
6. Paste the direct link in *Url* and complete the other fields.
7. Click *Ok*.

23.4.19.7 Enabling the Rich Text Learning Notification Editor

Enable the rich text notification editor for a What You See Is What You Get (WYSIWYG) editing experience.

Prerequisites

Before you upgrade, we recommend that you understand how the rich text editor works and how you plan to use it.

Customizing Notifications in the Notification Editor [page 1123]

Work Around for LOOP Tags in Tables for Notifications [page 1136]

Procedure

1. Go to *System Administration* > *Configuration* > *Global Application Settings*.
2. Select *Use Editor Content When Sending Email Notification* to enable the editor system-wide.
3. Go to *System Administration* > *Manage Email Notification*.
4. Open a notification template that you want to edit and then go to *Messages*.
5. To edit the content but still rely on the existing message syntax, click *Launch Editor* but do **not** select *Use Editor Content When Sending this Notification*.
6. When you are ready to begin sending notifications based on the rich text editor, select *Use Editor Content When Sending this Notification* for each individual message.

23.4.19.8 Finding the Relationships Among Notification Components

To work with notifications, you often need to find how its main components relate to one another so that you know which component to change.

Prerequisites

Before you begin, be sure to understand how the components work together. The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 1142]

Procedure

1. Go to *System Administration* > *Manage Email Notofication* > *Email Notification Templates* and in *Records per Page*, select *All*.
2. Use your browser's Find option to find the template you're looking for or use this help.

   Template ID to Trigger to Receiver Map [page 1160]

   Locations Where You can Send Ad Hoc Notifications in SAP SuccessFactors Learning [page 1195]
3. Click the *Edit* or the *View* button for the template (depending on whether you want to edit it or just view the relationships).
4. In *Summary*, look at the *Syntax ID* field.

   This is the notification template's Syntax ID. You can edit the syntax object in *System Admin* > *Configuration* > *Notification Syntax*.
5. In *Messages*, look for the labels that the notification is using by searching for `label key=`.

   The value of the `key` attribute is a label ID, which resolves to text in the recipient's native language. You can edit the value that it resolves to in *References* > *Geography* > *Labels*.
6. In *Messages*, click *Syntax Tags*.

   You see a list of the syntax tags that are permitted for this syntax object and this notification template and a description of the syntax tag.

23.4.19.9 Rendering SAP SuccessFactors Learning Notification Messages for Testing

We make changes in the notification editor so that messages can be rendered properly for testing.

Templates from the Legacy Editor are automatically brought into in the new notification editor, which renders a preview of the preprocessed template. When we bring templates into the new editor and render them for live preview and email preview, we make changes so that the message can be tested in many email clients:

- Add appropriate HTML elements to support the body content being rendered in the preview.
- Render standard HTML elements in their native formats (for example, tables are rendered as actual tables).
- Render syntax tag descriptions with appropriate wrappers in the place of tags because the template is not connected to a data set at the time that you test it.
- Escape tags used in `href` of `a` and `src` of `img` because the template is not connected to a data set at the time that you test it.
- Convert special tags like `LOOP` to their equivalent implementation for the rich text editor.
- Handle a special condition where the `LOOP` tag is used within a table.

Related Information

Learning Notification Code View [page 1133]
Work Around for LOOP Tags in Tables for Notifications [page 1136]
Iterative Syntax Tags: LOOP and ROLLUP [page 1131]

23.4.19.10 SAP SuccessFactors Learning Email Notification Template Migration

When you first open notification templates in *Email Notification Template Editor*, SAP SuccessFactors Learning you should check for errors in the template before and after you open it.

You open *Email Notification Template Editor* by going to *System Administration* > *Manage Email* > *Email Notification Templates*, finding and opening the template, going to *Messages*, and then choosing *Launch Editor*.

- Before you choose *Launch Editor*, look if `style` elements are outside of the `body` element. We support `style` only when it is inside `body`.
- After you choose *Launch Editor*, check that:
  - The content of `body` loads correctly in the new editor.
  - The inline `style` elements work (test the notification for formatting).

Related Information

Legacy Notification Template Editor [page 1175]
Viewing Original Email Notification Templates [page 1175]

23.4.19.11 Iterative Syntax Tags: LOOP and ROLLUP

In SAP SuccessFactors Learning, `LOOP` and `ROLLUP` tags iterate over data to create lists.

SAP SuccessFactors Learning uses iterative syntax tags for some notification messages. Iterative syntax tags iterate, or loop, over a series of data. For example, the ApmComponentRequest notification template sends a list of

courses that users are requesting. It uses the LOOP iterative tag to loop over the list of requested courses and add individual course information.

> ⚠ Restriction
>
> Although you can use these special tags in any notification template, unless you take action with other tags learners do not receive the iterative information.

LOOP Tag

The LOOP tag is the most common iterative tag. Use it to loop over a section of the notification to build lists. For example, you can loop over items to add the item type ID, the item ID, the revision, and the title for all items assigned to a user.

> {·} Sample Code

```
<!-- This message text is outside the loop, so it is added -->
<!-- once at the beginning of the email. -->
<label key="notification.ApmComponentRequest.MessageText1"/>
<!-- This is the start of the loop. The loop logic is standard: -->
<!-- as long as the number of courses written to the message -->
<!-- is less than the total amount fetched from the database -->
<!-- the iterative tag continues to write -->
<LOOP>
<!-- This message is inside the loop so it is written once for each course on
the request list -->
<label key="notification.ApmComponentRequest.MessageText2"
<!-- These values are written for each requested course fetched. -->
arg0="<CPNT_TYPE_ID/>" arg1="<CPNT_ID/>" arg2="<REV_DATE/>"
arg3="<CPNT_TITLE/>" arg4="<CPNT_REQ_COUNT/>"/>
<!-- This HTML break is written once for each requested course fetched -->
<br>
<!-- This ends the loop -->
</LOOP>
```

> ⚠ Caution
>
> Restrict LOOP tags to a list: a subset of your notification template. If you surround the entire notification template with LOOP tags, the notification system builds very large messages and you are likely to run out of memory.

Rollup Tags

In addition to the LOOP tag, we include these special iterative tags called rollup tags. They are shortcuts so that you do not always need to build a full loop structure.

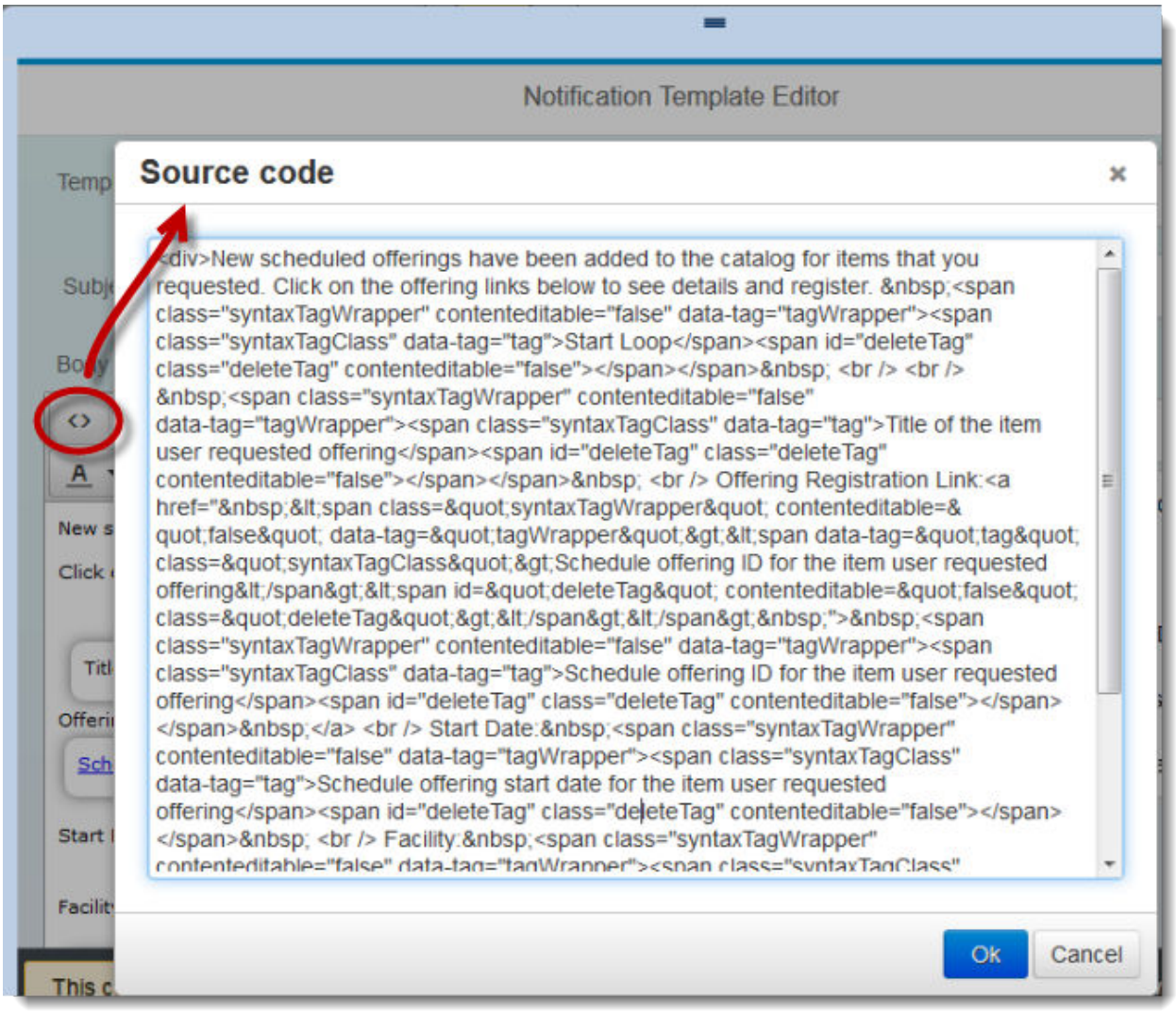
Special Iterative Tags

Tag Name	Purpose
&ROLLUP_MESG	This forces the text that precedes it to appear in non-user notifications.
&ROLLUP_STUD_ID	This displays the ID of each user who receives the notification message.
&ROLLUP_STUD_NAME	This displays the last name, first name, and middle initial of each user who receives the notification message

23.4.19.11.1 Learning Notification Code View

Administrators view the underlying code of notifications when working in the SAP SuccessFactors Learning notification editor.

If something is not working in the rich text editor, you can always edit the mark-up directly. Click the *Source code* button  to open the source code view.



Source Code View

If you are familiar with the code from Q3 2015 and earlier, you notice that the code differs. The code in the learning notification code view is the code that renders the rich text, not the syntax tags or labels themselves. Follow these tips to help you with the code.

Working with the Code

Copy the code out of the code view and paste it into an HTML or XML editor. The editor will give you more tools for formatting, syntax highlighting, and so on. You can use the code view for light editing, but we don't recommend it if you are making larger changes to the syntax.

Working with Syntax Tags and Locale Labels

In Q3 2015 and earlier, you used the legacy notification editor in *System Administration* > *Manage Email* > *Email Notification Templates* > *Messages*. In that editor, you could directly edit:

- Data syntax tags like `<SCHED_ID/>` - these syntax tags add data. For example, `<SCHED_ID/>` added the scheduled offeirng ID.
- Logic syntax tags like `<LOOP></LOOP>` - these syntax tags add logic. For example, `<LOOP></LOOP>` created a loop over a list of classes, users, and so on so that users could receive a digest email instead of individual emails for each scheduled offering, user, and so on.
- Label keys like `<label key="notification.ApmWaitlistRequest.MessageText2" arg0=... />` - These label keys looked up the text in users' set locales and rendered it for that user. You could pass the label keys arguments like data syntax tags to compose a message with dynamic data.

In Q4 2015 and later, the rich text notification editor hides the complexity of the tags. As a side effect, it changes the way that you are accustomed to working in the code.

Data syntax tags look a little different because the code view shows you what it does to **render** the syntax tags for the rich text editor instead of the syntax tag itself. For example, in the Q3 2015 and previous release, if you wanted to insert a user ID into a notification, you types `<STUD_ID/>`. In Q4 2015 and later, we render the syntax ID as follows:

Sample Code

```
<!--This is the wrapper that renders the rounded-edge box in the RTE -->
<span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper">
<!--This is the actual data syntax tag (data-tag) with what you see -->
<!--in the RTE within the rounded-edge box: "User ID" -->
<span class="syntaxTagClass" data-tag="tag">User ID</span>
<!--This line creates the X in the RTE. The X deletes the data syntax tag -->
<span id="deleteTag" class="deleteTag" contenteditable="false"/>
<!--Closing the wrapper-->
</span>
```

The logic syntax tag `<LOOP></LOOP>` is an exception to the above. When you open the code view, you see the rich text editor rendering of the tag. Here is an example of the start loop rendering:

Sample Code

```
<span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper">
  <span class="syntaxTagClass" data-tag="tag">Start Loop</span>
  <span id="deleteTag" class="deleteTag" contenteditable="false"/>
</span>
```

That rendering works for lists, but it does not work for tables. If you want to insert a table, you must go back to the Q3 2015 and earlier rendering in the code view. For example:

Sample Code

```
<table>
  <tr><!--Your column headings --></tr>
<LOOP>
  <tr><!--A repeating row--></tr>
</LOOP>
</table>
```

Labels are no longer rendered. Instead, you see the text from the label key “shine through” to the rich text editor. Because the editor knows the locale (you select it in the editor), it can retrieve the text itself and display it to you. This creates a slight side effect in the code view: you must be aware of the locale that you originally selected in the rich text editor.

Related Information

Work Around for LOOP Tags in Tables for Notifications [page 1136]

23.4.19.11.2 Work Around for LOOP Tags in Tables for Notifications

Learning administrators who want to create batch notifications that include tables must work around a limitation with loop tags.

Background: Q3 2015 and Earlier Use of LOOP Tags

Tables are a common customization in SAP SuccessFactors Learning. Companies want to create digest emails to tell their employees, for example, all users who have been added to a waitlist. The employees don't want an individual email for each employee, they want a batch email that tells them all users who have been added after the last time they were notified.

In the past, the default notifications were difficult to read, so many companies customized them by formatting the notifications with tables. To continue the example, each waitlisted user went into a new row in a table. To create a loop that adds rows for each user, you use the logic syntax tag <LOOP></LOOP>. The result is syntax like the following.

Sample Code

```
<table>
  <tr>
<!-- In an actual notification, the heading rows would be label keys.-->
<!-- For clarity, they are plain text in this example. -->
    <th>User Name</th>
    <th>User ID</th>
    <th>Item Key</th>
    <th>Course Title</th>
    <th>Registration Status</th>
    <th>Offering ID</th>
  </tr>

<!--Start of loop for each body row (each user)-->
<LOOP>
  <tr>
    <td><STUD_NAME/></td>
```

```
    <td><STUD_ID/></td>
    <td><CPNT_TYPE_ID/> - <CPNT_ID/> - <REV_DATE/></td>
    <td><CPNT_TITLE/></td>
    <td><ENROLL_STATUS/></td>
    <td><SCHED_ID/></td>
  </tr>
<!--End of loop-->
</LOOP>
</table>
```

Use of LOOP Tags Without Tables

With the introduction of the rich text editor, we include the <LOOP></LOOP> tags.

If you click *Code View* , however, you notice that the loop tags are no longer in the code as <LOOP></LOOP>. Instead, you see the following. This is called a "span wrapper" because it wraps what you see in the rich text editor with span tags. The span wrappers for LOOP tags are the current limitation.

Sample Code

```
<!-- This is what start of loop looks like -->
<span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper">
<span class="syntaxTagClass" data-tag="tag">Start Loop</span>
<span id="deleteTag" class="deleteTag" contenteditable="false"/>
</span>

<!-- The batched contents go here -->

<!-- This is what end of loop looks like -->
<span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper">
<span class="syntaxTagClass" data-tag="tag">End Loop</span>
<span id="deleteTag" class="deleteTag" contenteditable="false"/>
</span>
```

Importantly, as long as you avoid tables, the span wrappers for LOOP tags work as expected. For example, if you create a list of users and separate them with punctuation, the loop tags work as expected in the rich text editor.

Use of LOOP Tags with Tables

If you want to use tabular formatting, you must open the code view and remove the span wrappers for the LOOP tags and replace them with the Q3 2015 and previous formatting. You change them to simply <LOOP> to start the loop and </LOOP> to close the loop.

The Q4 2015 and later example below results in the same notification as the Q3 2015 and previous example above. Notice that the loop span wrapper tags have been replaced with <LOOP> and </LOOP>.

Sample Code

```
<table>
  <tr>
```

```
<!-- When working with the Q4 2015 and later notification editor, -->
<!-- you do not need labels because the editor knows its language context. -->
    <th>User Name</th>
    <th>User ID</th>
    <th>Item Key</th>
    <th>Course Title</th>
    <th>Registration Status</th>
    <th>Offering ID</th>
  </tr>

<!-- Start of loop for each body row (each user)-->
<!-- The code view wants to render the loop tags with SPAN -->
<!-- wrappers. You must find them and replace them with simple -->
<!-- LOOP tags. Notice that the data syntax tags (like user ID) -->
<!-- still require the span wrappers. -->
<LOOP>
  <tr>
    <td>
      <span class="syntaxTagWrapper" contenteditable="false" data-
tag="tagWrapper"><span
            class="syntaxTagClass" data-tag="tag">User Name</span><span
id="deleteTag"
            class="deleteTag" contenteditable="false"/></span>
    </td>
    <td>
      <span class="syntaxTagWrapper" contenteditable="false" data-
tag="tagWrapper"><span
            class="syntaxTagClass" data-tag="tag">User ID</span><span
id="deleteTag"
            class="deleteTag" contenteditable="false"/></span>
    </td>
    <td>
      <span class="syntaxTagWrapper" contenteditable="false" data-
tag="tagWrapper"><span
            class="syntaxTagClass" data-tag="tag">Item Type ID</span><span
id="deleteTag"
            class="deleteTag" contenteditable="false"/></span>
      <span class="syntaxTagWrapper" contenteditable="false" data-
tag="tagWrapper"><span
            class="syntaxTagClass" data-tag="tag">Item ID</span><span
id="deleteTag"
            class="deleteTag" contenteditable="false"/></span>
      <span class="syntaxTagWrapper" contenteditable="false" data-
tag="tagWrapper"><span
            class="syntaxTagClass" data-tag="tag">Revision Date</span><span
id="deleteTag"
            class="deleteTag" contenteditable="false"/></span>
    </td>
    <td>
      <span class="syntaxTagWrapper" contenteditable="false" data-
tag="tagWrapper"><span
            class="syntaxTagClass" data-tag="tag">Item Title</span><span
id="deleteTag"
            class="deleteTag" contenteditable="false"/></span>
    </td>
    <td>
      <span class="syntaxTagWrapper" contenteditable="false" data-
tag="tagWrapper"><span
            class="syntaxTagClass" data-tag="tag">Registration Status</
span><span id="deleteTag"
            class="deleteTag" contenteditable="false"/></span>
    </td>
    <td>
      <span class="syntaxTagWrapper" contenteditable="false" data-
tag="tagWrapper"><span
            class="syntaxTagClass" data-tag="tag">Scheduled Offering ID</
span><span id="deleteTag"
            class="deleteTag" contenteditable="false"/></span>
```

```
    </td>
  </tr>
<!--End of loop-->
</LOOP>
</table>
```

Repeating rows is the most likely use of loops in tables, but if you choose to repeat columns, you must follow the same pattern.

Sample Code

```
<table>
  <tr>
<!-- LOOP tag without span wrapper -->
    <LOOP>
     <td><!-- data syntax tags go here --></td>
    </LOOP>
  </tr>
</table>
```

Related Information

Learning Notification Code View [page 1133]

23.4.19.12 SAP SuccessFactors Learning Email Notification Messages

SAP SuccessFactors Learning builds and sends email messages as notifications.

You can configure SAP SuccessFactors Learning to send email messages to one or more individuals when an event occurs or a condition is met. For example, SAP SuccessFactors Learning can send email messages to administrators, managers, instructors, users, or other contacts when:

- An automated process or background job is completed.
- A user registers, withdraws from, requests, or is added to a waiting list for a course.
- A class is rescheduled or canceled.
- A competency assessment must be completed.
- Inventory must be reordered.

You define email settings on the *Mail* tab in *Global Application Settings* (*Learning Administration* > *System Administration* > *Configuration* > *Global Application Settings*). You can provide a different email address in the *Application Notification Reply-To Email* field for email notifications. The email address in the *Application Notification Reply-To Email* field is populated based on the data configured in the *Application Notification Admin Email*, or the *Application Notification User Email* fields. You can set the *Use Application Notification User Email for manager email notifications* option so overdue training reminders will not be sent to the recipient using the manager's email, but will use the *Application Notification User Email* instead. The *Generate without sending* setting can be used for testing purposes by allowing you to preview the email information in the *Email Summary Audit Report* without sending it to any users.

Use the following fields on the *Learning Administration* > *System Administration* > *Configuration* > *Global Application Settings* > *Mail* tab for configuring the display name for your email notifications:

- **Admin Email Display Name:** the value in this field is used for admin email notifications.
- **User Email Display Name:** the value in this field is used for user email notifications.
- **Default Display Name:** the value in this field is used for admin and user notifications when no value exists in the previous two fields.

SAP SuccessFactors Learning Notification Email Templates [page 1140]
Notification email templates control the format and content of email messages sent from SAP SuccessFactors Learning.

SAP SuccessFactors Learning Notification Email Syntax Tags [page 1141]
Syntax tags insert dynamic content into SAP SuccessFactors Learning notification email templates.

The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 1142]
To work with SAP SuccessFactors Learning, you need to understand the relationship among its primary components.

The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 1143]
SAP SuccessFactors Learning has two types of notification email messages: ad hoc and system. They serve two different purposes and work a little differently.

How SAP SuccessFactors Learning Generates Email Message Notifications [page 1144]
This explains how email notifications are generated from SAP SuccessFactors Learning.

Understanding Sender Display Name Logic [page 1145]
There is a specific priority the system follows when applying the *Admin Email Display Name*, *User Email Display name*, and *Default Display Name* you've entered on the *System Administration* > *Configuration* > *Global Application Settings* > *Mail* page.

23.4.19.12.1 SAP SuccessFactors Learning Notification Email Templates

Notification email templates control the format and content of email messages sent from SAP SuccessFactors Learning.

Notification templates format a batch of email messages to learners. Each template sends a different kind of bulk mail. For example, one template might produce a bulk message to all learners in a class about the time and place where it meets and another might inform users that they have moved from the class waitlist to an enrolled member of the class.

Each template contains both personalized and generic content.

- Generic content is boilerplate that appears in the message for all users. For example, a notification template that formats messages confirming enrollment might have generic content that says “Congratulations, you are now enrolled!”: all recipients receive the congratulations. Labels insert generic content.
- Personalized content is unique to the instance of the message. For example, in a template that sends enrollment notifications to managers, generic content could be “The following members of your team have enrolled in a course:” and the personalized content could be the first and last name of user. Syntax tags insert personalized content.

→ Tip

You can think of notification email templates as mail merge templates.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 1139]

Related Information

SAP SuccessFactors Learning Notification Email Syntax Tags [page 1141]
The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 1142]
The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 1143]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 1144]
Understanding Sender Display Name Logic [page 1145]

23.4.19.12.2 SAP SuccessFactors Learning Notification Email Syntax Tags

Syntax tags insert dynamic content into SAP SuccessFactors Learning notification email templates.

In SAP SuccessFactors Learning, notification templates have a closed set of syntax tags. The set is grouped by a notification syntax name. For example, `APM_COMPONENT_REQUEST` is the notification syntax group for the tags that Learning uses to send email messages about the Item Request Notification automatic process. You can see the available tags by either going to *System Administration* > *Manage Email* > *Email Notification Token Sets* or by editing the notification template in the notification template editor.

For example, if you are editing the item request notification, you see a list of syntax tags in the *Syntax Tags* section of the editor. Among the list of syntax tags (placeholders for dynamic content) is the learning item title. The learning item title syntax tag is in the list of syntax tags because it is among the set of tags in `APM_COMPONENT_REQUEST`.

⚠ Restriction

You cannot add syntax tags: they are set by SAP SuccessFactors.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 1139]

Related Information

SAP SuccessFactors Learning Notification Email Templates [page 1140]
The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 1142]
The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 1143]

How SAP SuccessFactors Learning Generates Email Message Notifications [page 1144]
Understanding Sender Display Name Logic [page 1145]

23.4.19.12.3 The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates

To work with SAP SuccessFactors Learning, you need to understand the relationship among its primary components.

When you work with notifications, you have three components to consider: the notification template, the syntax object, and the syntax tags. Most of your work is to understand how the components are related to one another. SAP SuccessFactors Learning, exposes the relationships in the administration environment, but not the purpose of each component and how they work together.

- Syntax tags provide dynamic data, like a mail merge. For example, for each learning plan notification that the system sends, it dynamically includes the users' first name for the `<FIRST_NAME/>` syntax tag placeholder.
- Syntax objects define how those placeholders work and what translated text the notification system should use. For example, the learning plan syntax object defines what readers should see in the subject line, in the body of the email, and how the message should iterate over a list of added, modified, and removed plans. Importantly, it also identifies the label IDs so that users can read the notification in their own language.
- Notification Templates wrap syntax objects and provide the hook to the triggering event and provide attachments. For example, the Learning Plan Notification automatic process triggers the `ApmStudentLearningPlanNotification` template.

Example

1. When the Learning Plan Notification automatic process runs, it triggers the notification template `ApmStudentLearningPlanNotification`. If there are attachments associated with this notification template in *System Administration* > *Manage Email* > *Email Notification Templates* > *Attachments*, the notification system will attach them to the email.
2. The notification system looks up the syntax object associated with `ApmStudentLearningPlanNotification` and finds the syntax object `APM_STUDENT_LEARNING_PLAN_NOTIFICATION`.
3. From `APM_STUDENT_LEARNING_PLAN_NOTIFICATION`, the notification system obtains the rules and format of the message. For example, `APM_STUDENT_LEARNING_PLAN_NOTIFICATION` loops over added, modified, and deleted assignments to create three list categories. It also uses the label ID `notification.ApmStudentLearningPlanNotification.MessageText1`, which resolves to text in the users' native languages.
4. Each syntax tag, like `<REVISION_DATE_DELETED/>`, pulls in the instance text for the user. For example, for each learning item that is deleted, `<REVISION_DATE_DELETED/>` pulls in the revision date of the deleted learning item.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 1139]

Related Information

SAP SuccessFactors Learning Notification Email Templates [page 1140]
SAP SuccessFactors Learning Notification Email Syntax Tags [page 1141]
The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 1143]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 1144]
Understanding Sender Display Name Logic [page 1145]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 1144]
Legacy Notification Templates Editor Sections [page 1176]
Using Locale Labels to Translate Notifications (Legacy Editor) [page 1176]
Template ID to Trigger to Receiver Map [page 1160]
Email Notification Template Groups in SAP SuccessFactors Learning [page 1145]

23.4.19.12.4 The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning

SAP SuccessFactors Learning has two types of notification email messages: ad hoc and system. They serve two different purposes and work a little differently.

System Notification Templates

System provided notification templates are triggered by learning events, like a registration or an automatic process. When they're configured properly, the are automatic. For example, when learners register for classes, they receive notifications about the time and place of the class, their managers are informed that they're enrolled, and so on.

System notification templates aren't flexible: they have a defined set of syntax tags and each template has a trigger.

Ad Hoc Notification Templates

Ad hoc notification templates allow administrators to send email messages pages that define users in SAP SuccessFactors Learning Administration. For example, in *Learning Activities* > *Classes*, administrators can click *Send Notifications* to send a message to users who are associated with the class (enrolled, waitlisted, and so on).

Because ad hoc notifications are triggered by a person, they have a special set of syntax tags and different rules.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 1139]

Related Information

SAP SuccessFactors Learning Notification Email Templates [page 1140]
SAP SuccessFactors Learning Notification Email Syntax Tags [page 1141]
The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 1142]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 1144]
Understanding Sender Display Name Logic [page 1145]
Locations Where You can Send Ad Hoc Notifications in SAP SuccessFactors Learning [page 1195]
Notification Tags Available in Ad Hoc Notifications [page 1158]

23.4.19.12.5 How SAP SuccessFactors Learning Generates Email Message Notifications

This explains how email notifications are generated from SAP SuccessFactors Learning.

The system stores the notification messages in the PA_MAIL table and sends them asynchronously to the SMTP server, using an internal task scheduler. Therefore, email generation in depends on:

- The SMTP configuration parameters being specified correctly.
- The SMTP server itself being available and configured with the corresponding parameters in SAP SuccessFactors Learning. If the SMTP server rejects e-mail messages ("relaying denied"), then the system will not redeliver the messages at a later time. Rejected messages are discarded without indications other than some errors in the output log of the application server.

Additionally, the system relies on e-mail addresses attached to users, supervisors, and administrators in SAP SuccessFactors Learning to be specified (not blank) and valid; otherwise, the cannot generate proper email messages. If you schedule a background job and that job fails, then the system generates no email message; therefore, no email message is sent or stored in the PA_MAIL table.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 1139]

Related Information

SAP SuccessFactors Learning Notification Email Templates [page 1140]
SAP SuccessFactors Learning Notification Email Syntax Tags [page 1141]
The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 1142]
The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 1143]
Understanding Sender Display Name Logic [page 1145]

23.4.19.12.6 Understanding Sender Display Name Logic

There is a specific priority the system follows when applying the *Admin Email Display Name*, *User Email Display name*, and *Default Display Name* you've entered on the *System Administration* > *Configuration* > *Global Application Settings* > *Mail* page.

The system applies the sender name according to the sender address with the following priorities:

1. First the system checks if the From email address matches the Application Notification Admin Email. If it matches, it uses the *Admin Email Display Name*, unless it is blank. If it's blank it uses the *Default Display Name*. If the Default Display name is blank, only the email address displays.
2. Next the system checks is the From email address matches the Application Notification User Email. If it matches, it uses the *User Email Display Name*, unless it is blank. If it's blank it uses the *Default Display Name*. If the Default Display name is blank, only the email address displays.

The above logic also works for ad-hoc notifications. Using the sender name is not required. For manager notifications the system prioritizes the manager names over the administrator configured names, as this lets subordinates know the email is from their manager. This overrides the *Use Application Notification User Email for manager email notification* and *Enable Email Domain Validation* settings.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 1139]

Related Information

SAP SuccessFactors Learning Notification Email Templates [page 1140]
SAP SuccessFactors Learning Notification Email Syntax Tags [page 1141]
The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 1142]
The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 1143]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 1144]

23.4.19.13 Email Notification Template Groups in SAP SuccessFactors Learning

Email notification template groups categorize notification templates.

Template categories are useful to understand utility templates, unused templates, and user-facing templates. They are not a technical grouping. They are a functional grouping.

23.4.19.13.1 Automatic Process Templates

SAP SuccessFactors Learning administrators, users, and managers receive email messages based on these templates when an automatic process manager (APM) completes its job.

> **Note**
>
> Template IDs continue to use previous terminology. For example, while the term catalog changed to library, the template ID remains ApmUpdateCatalogPrice.

This Template ID	Is used as Follows
ApmAttachmentQuotaWatch	You can use the ApmAttachmentQuotaWatch template ID to customize the message that identifies when the cumulative size of attachments hits a threshold percentage of the maximum allowed.
ApmCouponExpiry	You can use the ApmCouponExpiry template ID to customize the message that the system sends to the person whose email address is in the Owner Email box (*Finance* > *Coupons* > *Coupon Details tab* >) of the expiring coupon entity.
ApmComponentRequest	You can use the ApmComponentRequest template ID to customize the message that an administrator receives when a class reaches its minimum registration.
ApmInitiativeEmployeeNotification	You can use the ApmInitiativeEmployeeNotification template ID to customize the message that employees receive when their organization is assigned to an initiative.
ApmInitiativeOwnerNotification	You can use the ApmInitiativeOwnerNotification template ID to customize the message that organization owners receive when they're assigned to an initiative.
ApmInitiativeRequiredReminder	You can use the ApmInitiativeRequiredReminder template ID to customize the message that organization owners receive when an initiative approaches its due date.
ApmInstanceDelivery	You can use the ApmInstanceDelivery template ID to customize the message that users and managers receive when users are enrolled in a class.
ApmQualificationCleanup	You can use the ApmQualificationCleanup template ID to customize the message that an administrator receives when the curriculum cleanup process is completed.

This Template ID	Is used as Follows
ApmResetOnlineComponents	You can use the ApmResetOnlineComponents template ID to customize the message that an administrator receives when the reset online item process resets items to the beginning for users who started but didn't complete an item before its expiration date.
ApmReviewCouldNotStartContactError	You can use the ApmReviewCouldNotStartContactError template ID to customize the message that an administrator receives when a review process can't start because one or more users don't have a manager.
ApmReviewInitiationContactError	You can use the ApmReviewInitiationContactError template ID to customize the message that an administrator receives when an ongoing review process can't start because a user doesn't have a manager.
ApmReviewInitiationSummary	You can use the ApmReviewInitiationSummary template ID to customize the message that an administrator receives when a new performance review begins.
ApmStudentLearningPlanNotification	You can use the ApmStudentLearningPlanNotification template ID to customize the message that users and managers receive when a learning plan changes.
ApmSupervisorLearningPlanNotification	You can use the ApmSupervisorLearningPlanNotification template ID to customize the message that managers receive that lists users who have and haven't completed items.
ApmSupervisorReviewIncompleteAssessment	You can use the ApmSupervisorReviewIncompleteAssessment template ID to customize the message that managers receive when they're assigned to review a performance assessment and one or more raters haven't submitted their assessments.
ApmSynchronizeStudentChangesAssignmentProfile	You can use the ApmSynchronizeStudentChangesAssignmentProfile template ID to customize the message that administrators receive when the automatic process removes users whose attributes and security domains no longer match those of the assignment profile. This APM also adds users whose attributes and security domains match those of the assignment profile.
ApmTrainingExpiration	You can use the ApmTrainingExpiration template ID to customize the message that users and managers receive when an assigned item approaches its due date for completion.

This Template ID	Is used as Follows
ApmTrainingOverdue	This email notification template is used if *SuccessFactors Overdue Learning Notification* is selected in *System Administration* > *Automatic Processes* > *Learning Expiration Email Notification*. Otherwise, when users have overdue learning items, they receive email notifications based on ApmTrainingExpiration.
ApmUpdateCatalogPrice	You can use the ApmUpdateCatalogPrice template ID to customize the message that an administrator receives when a library price changes.
ApmVlsAttendanceProcessing	You can use the ApmVlsAttendanceProcessing template ID to customize the message that an administrator receives when attendance entities for a VLS session are compiled.
ApmWaitlistRequest	You can use the ApmWaitlistRequest template ID to customize a message that the administrator, manager, and user receives when users who are on a waiting list for a class can't be enrolled in it and are placed on a waiting list for the next available class.
ItemEvaluationAssignmentNotification	You can use the ItemEvaluationAssignmentNotification template ID to customize the message that users receive when users are assigned a new survey.
JamGroupInvitation	You can use the JamGroupInvitation template ID to edit the message that the system sends when an administrator sets an invitation setting while associating an item with a Jam group.
FollowupEvaluationAssignmentNotification	You can use the FollowupEvaluationAssignmentNotification template ID to customize the message managers receive when users are assigned a new survey.
ApmLearningReminder	You can use the ApmLearningReminder template ID to customize the message recipients receive when learners have pending assignments, both required and non-required, that are assigned to them without specified due dates for completion.

23.4.19.13.2 Assessment Process Templates

Use Assessment Process templates to customize email messages individuals receive when an assessment process event is completed, when the recipient(s) must complete a task, or when the assessment process changes.

> **Note**
>
> Assessment process notifications are unusual because most of them apply to Plateau legacy products.

This Template ID	Is Used as Follows
ApmAdminAssessmentReminder	You can use the ApmAdminAssessmentReminder template ID to customize the message that an administrator receives when a user hasn't yet completed an assessment.
ApmExternalAssessmentReminder	You can use the ApmExternalAssessmentReminder template ID to customize the message that raters receive when an assessment process approaches its due date.
ApmLearnerAssessmentReminder	You can use the ApmLearnerAssessmentReminder template ID to customize the message that a user receives when an assessment process approaches its due date.
AssessmentProcessAdministrator	You can use the AssessmentProcessAdministrator template ID to customize the message that an administrator receives when an assessment begins.
AssessmentProcessAssessorApprover	You can use the AssessmentProcessAssessorApprover template ID to customize the message that a supervisor receives after a user has selected the raters for his or her assessment process.
AssessmentProcessAssessorRemoved	You can use the AssessmentProcessAssessorRemoved template ID to customize the message that a rater receives when his or her assessment performance ratings are no longer needed for the users listed in the message.
AssessmentProcessAssessorsRejected	You can use the AssessmentProcessAssessorsRejected template ID to customize the message that a supervisor receives when an approver rejects one or more of the raters that the supervisor selected for a user's performance assessment.
AssessmentProcessCancellationAssessor	You can use the AssessmentProcessCancellationAssessor template ID to customize the message that raters receive when a performance assessment is canceled.
AssessmentProcessCancellationAssessorApprover	You can use the AssessmentProcessCancellationAssessorApprover template ID to customize the message that rater approvers receive when a performance assessment is canceled.
AssessmentProcessCancellationNominator	You can use the AssessmentProcessCancellationNominator template ID to customize the message that rater nominators receive when a performance assessment is canceled.
AssessmentProcessCancellationReviewer	You can use the AssessmentProcessCancellationReviewer template ID to customize the message that reviewers receive when a performance assessment is canceled.

This Template ID	Is Used as Follows
AssessmentProcessExternalAssessor	You can use the AssessmentProcessExternalAssessor template ID to customize the message that external raters receive when they're assigned to an assessment.
AssessmentProcessInternalAssessor	You can use the AssessmentProcessInternalAssessor template ID to customize the message that internal assessors receive when they're assigned to an assessment.
AssessmentProcessNominatorRescheduled	You can use the AssessmentProcessNominatorRescheduled template ID to customize the message that nominators receive when the start date for their assigned assessment changes.
AssessmentProcessNominatorStart	You can use the AssessmentProcessReviewer template ID to customize the message that a nominator receives when he or she is designated to select raters for one or more performance assessments.
AssessmentProcessReviewer	You can use the AssessmentProcessReviewer template ID to customize the message that a reviewer receives when he or she is assigned to an assessment.

23.4.19.13.3 Background Job Templates

Use Background Job templates to customize the email messages that the system sends to individuals when a background job is completed, when a background job report is available, or after a recurring report is created.

Background job notifications are sent, usually to administrators, when they run a job in the background. For example, when an administrator propagates an assignment profile, that is a background job. Most customers use the default template for these notifications because they are utilities.

This Notification Template	Is Used as Follows
BackgroundJobNotification	You can use the BackgroundJobNotification template ID to edit the message that an administrator receives when a background job is completed.
BackgroundReportJobNotification	You can use the BackgroundReportJobNotification template ID to customize the message that an administrator receives when a background job is completed and the background job report is available.

23.4.19.13.4 Catalog Items and Pricing Templates

Use Catalog Items and Pricing templates to customize the email messages that the system sends to individuals when an item in a catalog expires or will expire soon.

Catalog items and pricing template notifications are utilities, so most companies do not customize them.

This Notification Template	Is Used as Follows
ExpiredCatalogItemsNotification	You can use the ExpiredCatalogItemsNotification template ID to customize the message that an administrator receives when one or more expired items are removed from a catalog.
PRE_EXPIRATION_FOR_CATALOG_ITEMS	You can use the PreExpirationNotificationForCatalogItems template ID to customize the message that an administrator receives when one or more items in a catalog will expire soon.

23.4.19.13.5 Learning Plan Templates

Use Learning Plan templates to customize the email messages that the system sends to individuals when a learning plan event is completed, or when the recipient must complete a task. The Learning Plan templates include reserved seats, user plans, and password requests.

This Email Notification Template	Is Used as Follows
CareerPlannerTargetJobPositionChange	You can use the CareerPlannerTargetJobPositionChange template ID to customize the message that a manager receives when users change their targeted job position.
CERTIFICATE_OF_COMPLETION	You can use the CERTIFICATE_OF_COMPLETION template ID to customize the message that users receive when they complete an item.
EnrollmentSlotCancellation	You can use the EnrollmentSlotCancellation template ID to customize the message that users receive when a class in which they're enrolled is canceled.
EnrollmentSlotChangeConfirmation	You can use the EnrollmentSlotChangeConfirmation template ID to customize the message that an administrator receives when a class reserved seat is modified.
EnrollmentSlotConfirmation	You can use the EnrollmentSlotConfirmation template ID to customize the message that the organization e-mail recipient receives after an administrator adds a reserved seat to a class.

This Email Notification Template	Is Used as Follows
ESigPinExpiredNotification	You can use the ESigPinExpiredNotification template ID to customize the message that users receive when they try to log in with an expired PIN.
ESigPinFailedNotification	You can use the ESigPinFailedNotification template ID to customize the message that an administrator receives when a user can't add learning history because their PIN fails.
IDPApproval	You can use the IDPApproval template ID to customize the message that users receive when their development plan is approved.
IDPApprovalCancelledBySystem	You can use the IDPApprovalCancelledBySystem template ID to customize the message that users receive when their development plan is canceled because the manager is replaced.
IDPApprovalRequest	You can use the IDPApprovalRequest template ID to customize the message that a manager receives when a user submits a plan.
IDPExpiration	You can use the IDPExpiration template ID to customize the message that a user receives when a plan reaches its expiration date.
IDPExpirationNotification	You can use the IDPExpirationNotification template ID to customize the message that a user receives when a plan approaches its expiration date.
IDPInactiveApproval	You can use the IDPInactiveApproval template ID to customize the message that a user receives when a plan is approved before its effective date. The plan remains inactive until it reaches its effective date.
IDPNote	You can use the IDPNote template ID to customize the message that users receive when a manager or coach adds a note to their plan.
IDPReject	You can use the IDPReject template ID to customize the message that users receive when the approver has rejected the user's development plan.
PasswordNotification	You can use the PasswordNotification template ID to customize the message that users receive when they request their password or when an administrator creates a new user entity and the enableRandomPasswordGenerationForNewUsers property in the LMS_Admin configuration ID is set to true.

This Email Notification Template	Is Used as Follows
ReassignStudentComponentNotification	You can use the ReassignStudentComponentNotification template ID to customize a message that users receive when they're reassigned to a new item.

23.4.19.13.6 Approval Processes Templates

Edit approval processes templates if you have set up an approval process for users to enroll into courses, withdraw from courses, and so on.

> **Note**
>
> This list contains some deprecated Plateau Performance templates that have not yet been removed from the system.

Who Receives Messages and When

Notification Template	Who Recieves Messages and When
ApprovalProcessApprovalProgressed	Users receive ApprovalProcessApprovalProgressed messages when a step in the approval process is completed.
ApprovalProcessApprovalRequired	Approvers receive ApprovalProcessApprovalRequired messages when an approval process begins.
ApprovalProcessApprovalWithdrawn	Users receive ApprovalProcessApprovalWithdrawn messages when an administrator withdraws their request for external training (external learning request).
ApprovalProcessInitialRequest	Users receive ApprovalProcessInitialRequest messages when an approval process begins.
ApprovalProcessRequestApproved	Users receive ApprovalProcessRequestApproved messages when a request for an item or class is granted.
ApprovalProcessRequestDenied	Users receive ApprovalProcessRequestDenied messages when a request for an item or class is denied.
ApprovalProcessRequestExpired	Users receive ApprovalProcessRequestExpired messages when a step in the approval process is completed.
ExternalVerificationReminder	Approvers receive ExternalVerificationReminder when users complete an external learning activity.
ExternalLearningRequestApprovalRequired	Approvers receive ExternalLearningRequestApprovalRequired messages when a user or administrator submits an external training request form.

Notification Template	Who Recieves Messages and When
ExternalLearningRequestVerificationRequired	Aprpovers receive ExternalLearningRequestVerificationRequired messages when a class has occurred and a user or administrator submits an external training request for verification.
ReviewProcessReviewApproval	Approvers receive ReviewProcessReviewApproval messages when a review process requires his or her electronic signature.
ReviewProcessReviewApprovalDenied	Users receive ReviewProcessReviewApprovalDenied messages when a step in the approval process is completed and denied.
ReviewProcessReviewCreatedEmployee	Users receive ReviewProcessReviewCreatedEmployee messages when a review begins.
ReviewProcessReviewCreatedSupervisor	Supervisors receive ReviewProcessReviewCreatedSupervisor messages when they supervise an employee whose review is beginning.
ReviewProcessReviewDeadlinePassed	Supervisors receive ReviewProcessReviewDeadlinePassed messages when a review deadline has passed.
ReviewProcessReviewFeedbackRequired	Users receive ReviewProcessReviewFeedbackRequired messages when a supervisor designates the user as a feedback rater for a review.
ReviewProcessReviewNeeded	Supervisors receive ReviewProcessReviewNeeded messages when reviews begin.
ReviewProcessReviewPublished	Supervisors receive ReviewProcessReviewPublished messages when a review is completed, approved, and published.
ReviewProcessReviewReminder	Raters or approvers receive ReviewProcessReviewReminder messages when the rater or approver misses a deadline.
ReviewProcessReviewSubmittedEmployee	Users receive ReviewProcessReviewSubmittedEmployee messages when their supervisors submit reviews.
ReviewProcessReviewSubmittedSupervisor	Supervisors receive ReviewProcessReviewSubmittedSupervisor messages when their users submit reviews.
UserRecordedCompletionApprovalProcessRequestApproved	Sent to end-users when you enable an approval process for end-users to post learning events and when the process ends in an approval.
UserRecordedCompletionApprovalProcessRequestDenied	Sent to end-users when you enable an approval process for end-users to post learning events and when the process ends in a denial.

Notification Template	Who Recieves Messages and When
UserRecordedCompletionApprovalProcessApprovalRequired	Sent to approvers when you enable an approval process for end-users to post learning events and when the approver is in the approval process. This notifies the approver that they need to take action on an approval.

23.4.19.13.7 Class Templates

Use Class templates to customize the email messages that the system sends to individuals when users enroll in or register for classes or when classes are canceled.

> **Note**
>
> Class templates are among the most customized because they notify your users about scheduled courses and help them manage their calendars.

This Template	Is Used as Follows
SystemEnrollmentNotification	You can use the SystemEnrollmentNotification template ID to customize the message that a user, manager, and instructor receive when the user registers in a class or when a manager or administrator registers the user in a class.
SystemScheduleCancellationNotification	You can use the SystemScheduleCancellationNotification template ID to customize the message that a user, manager, and instructor receive when a class is canceled.
SystemUnenrollmentNotification	You can use the SystemUnenrollmentNotification template ID to customize the message that a user, manager, and instructor receive when the user withdraws from a class or when an administrator withdraws the user from a class.
SystemWaitlistNotification	You can use the SystemWaitlistNotification template ID to customize the message that a user, manager, and instructor receive when the user registers for waitlist status, or when an administrator registers the user for waitlist status, for a class.
SystemWaitlistRemovalNotification	You can use the SystemWaitlistRemovalNotification template ID to customize the message that a waitlisted user, a manager, and an instructor receive when an administrator or the system enrolls the waitlisted user in a class.

23.4.19.13.8 VLS Attendance Processing Templates

If you're using virtual learning to conduct training, you might edit the VLS attendance processing templates.

> ⚠ Caution
>
> Attendance processing doesn't work with all meeting rooms. Check your configuration.

This Template	Is Used as Follows
VLE_ENROLLMENT	You can use the VLE_ENROLLMENT template ID to customize the message that users receive when they're enrolled in a class that has a VLS component.
VLE_EVENT_CREATION	You can use the VLE_EVENT_CREATION template ID to customize the message that an instructor receives when a VLS server value is applied to a class.
VLE_EVENT_DELETION	You can use the VLE_EVENT_DELETION template ID to customize the message that an instructor and a learner receives when a VLS server value is removed from a class. This helpes them to update their calendars if they have the VLS link information.
VLE_EVENT_UPDATE	You can use the VLE_EVENT_UPDATE template ID to customize the message that an instructor receives when the VLS time frame in a class changes.
VLE_EVENT_UPDATE_STUDENTS	You can use the VLE_EVENT_UPDATE_STUDENTS template ID to customize the message that users receive when the VLS time frame in a class changes.
VLE_UNENROLLMENT	You can use the VLE_UNENROLLMENT template ID to customize the message that a user receives when he or she is unenrolled from a class that has a VLS component.

23.4.19.13.9 Miscellaneous Templates

We've grouped the notification templates that don't fall easily into another category of notification templates into this section. Individuals receive these notifications for a variety of reasons.

This Template	Is Used as Follows
AlternateSubordinateNotification	You can use the AlternateSubordinateNotification template ID to customize the message that users receive when they're **assigned to** a new, alternate manager.

This Template	Is Used as Follows
AlternateSupervisorNotification	You can use the AlternateSupervisorNotification template ID to customize the message that users receive when they're assigned as an alternate manager for another user.
DelegateeEmail	To inform users that they've been identified as a delegate, the system uses the DelegationAssignment template ID. To inform delegated users that they have something to complete on behalf of user who identified them as a delegate (called a delegator), then system uses the DelegateeEmail template ID. For example, if the delegator makes the delegate responsible for completing performance reviews, then the system: • Sends any original message that you've configured for performance reviews to the delegator. • Sends a message to the delegate that explains that the delegate has been identified to act on behalf of the delegator and 2) embeds a copy of the original message (so that the delegate knows what to complete) that the system sent to the delegator.
DelegationAssignment	You can use the DelegationAssignment template ID to customize the message that a delegate receives. The system sends this message for a simple reason: to notify delegates that they've been selected to act on behalf of another user **at some time in the future**. When a delegate needs to take a specific action, the system sends another message, using the DelegateeEmail template ID.
SELF_REGISTRATION_ADMIN	You can use the SELF_REGISTRATION_ADMIN template ID to customize the message that an administrator receives when a user creates a new account.
SELF_REGISTRATION_STUDENT	You can use the SELF_REGISTRATION_STUDENT template ID to customize the message that a user receives when he or she creates a new account.
UserTalentProfileExpired	You can use the UserTalentProfileExpired template ID to customize the message that users, with their mangers, receive when users are assigned a new survey.
ObserverNotification	This notification is sent when a user requests an observer for a task checklist. The nominated observer receives the notification.

23.4.19.14 Notification Tags Available in Ad Hoc Notifications

You can use only "user" syntax tag IDs with an ad hoc notification; that is, you can't use all of the syntax tag IDs associated with the notification template ID that you're using to base the ad hoc notification unless those syntax tag IDs are also part of the user-specific syntax tag IDs. Therefore, you must delete the non-user specific syntax IDs; otherwise, the syntax tag will appear as blank in the notification. For example, if you include the text "The Job ID is: <JOB_ID/>." (where there's no value) when you are creating an ad hoc notification message, the user receives the following text: "The Job ID is: ."

Syntax Tag IDs	Where the tag can be used
<STUD_ID/> (User ID)	Any ad hoc notification
<STUD_NAME/> (User Name)	Any ad hoc notification
<STUD_ORG/> (User organization)	Any ad hoc notification
<STUD_DMN/> (User domain)	Any ad hoc notification
<CPNT_ID/> (Item ID)	Class record *Learning Activities* > *Classes* > *Registration* *Learning Activities* > *Classes* > *Select a Class* > *Action*
<CPNT_TITLE/> (Item Title)	Class Record *Learning Activities* > *Classes* > *Registration* *Learning Activities* > *Classes* > *Select a Class* > *Action*
<CPNT_DESC/> (Item Description)	Class record *Learning Activities* > *Classes* > *Registration* *Learning Activities* > *Classes* > *Select a Class* > *Action*
<SCHD_DESC/> (Class Description)	Class record *Learning Activities* > *Classes* > *Registration*
<SCHD_SEGM/> (List of all segments in the scheduled offering)	*Users* > *Tools* > *Send Notifications* (only for Item, Schedule Offering, Curricula, Class) Registration tab for a scheduled offering *Learning Activities* > *Classes* > *Registration* *Learning* > *Tools* > *Scheduled Offering* > *Notifications* *Learning Activities* > *Classes* > *Select a Class* > *Action*

Syntax Tag IDs	Where the tag can be used
<SCHD_ID/> (Schedule ID)	*Users* > *Tools* > *Send Notifications* (only for Item, Schedule Offering, Curricula, Class) Registration tab for a scheduled offering *Learning Activities* > *Classes* > *Registration* *Learning* > *Tools* > *Scheduled Offering* > *Notifications* *Learning Activities* > *Classes* > *Select a Class* > *Action*
<&SCHD-CPNT> (Schedule Component)	*Users* > *Tools* > *Send Notifications* (only for Item, Schedule Offering, Curricula, Class) Registration tab for a scheduled offering *Learning Activities* > *Classes* > *Registration* *Learning* > *Tools* > *Scheduled Offering* > *Notifications* *Learning Activities* > *Classes* > *Select a Class* > *Action*
<&SEG-GRID> (Scheduled Offering Segment Grid)	*Users* > *Tools* > *Send Notifications* Registration tab for a scheduled offering *Learning Activities* > *Classes* > *Registration* *Learning* > *Tools* > *Scheduled Offering* > *Notifications* *Learning Activities* > *Classes* > *Select a Class* > *Action*
<&SCHED-INSTRUCTIONS/> (Scheduled Offering Registration Text)	*Users* > *Tools* > *Send Notifications* (only for Item, Schedule Offering, Curricula, Class) Registration tab for a scheduled offering *Learning Activities* > *Classes* > *Registration* *Learning* > *Tools* > *Scheduled Offering* > *Notifications* *Learning Activities* > *Classes* > *Select a Class* > *Action*
<&SEG-FACILITY> (Segment Facility)	*Users* > *Tools* > *Send Notifications* (only for Item, Schedule Offering, Curricula, Class) Registration tab for a scheduled offering *Learning Activities* > *Classes* > *Registration* *Learning* > *Tools* > *Scheduled Offering* > *Notifications* *Learning Activities* > *Classes* > *Select a Class* > *Action*

Syntax Tag IDs	Where the tag can be used
<&SCHD-DESC-EDITABLE> (Scheduled Description Editable)	*Users* > *Tools* > *Send Notifications* (only for Item, Schedule Offering, Curricula, Class) Registration tab for a scheduled offering *Learning Activities* > *Classes* > *Registration* *Learning* > *Tools* > *Scheduled Offering* > *Notifications* *Learning Activities* > *Classes* > *Select a Class* > *Action*

Related Information

The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 1143]

23.4.19.15 Template ID to Trigger to Receiver Map

Use this map to understand who receives an email, what triggers the email to be sent, and what template ID the system uses to format the email.

Template, Trigger, and Receiver Map

Template ID	Trigger	Recipient
AlternateSubordinateNotification	A manager or an administrator assigns a user to be an alternate manager.	The user who has been **assigned to** a new, alternate manager.
AlternateSupervisorNotification	A manager or an administrator assigns a user to be an alternate manager.	The users who were **assigned to** the alternate manager.
ApmAdminAssessmentReminder	Assessment Notification Automatic Process	The email address identified by the automatic process

Template ID	Trigger	Recipient
ApmAttachmentQuotaWatch	The combined size of the attachments in the system equals or exceeds the percentage in the *Utilization Threshold* field (*System Administration* > *Automatic Processes* > *Exceeded Attachment Space Email Notification*) multiplied by the value of the `totalAttachmentsSpaceAllocatedKB` property in the ATTACHMENT configuration ID (*System Administration* > *Configuration* > *System Configuration*)	The email address identified by the automatic process
ApmComponentRequest	Class Request Demand Met Email Notification	The email address identified by the automatic process Contact email at item entity level
ApmCouponExpiry	The value in the *Valid To* date field (*Finance* > *Coupons* > *Coupon Details*) of the coupon entity falls within the threshold, you set in the *Expiration Email Notification Threshold* area for the Coupon Expiration Email Notification automatic process (*System Administration* > *Automatic Processes* > *Coupon Expiration Email Notification*).	The person whose email address is in the *Owner Email* field (*Finance* > *Coupons* > *Coupon Details*) of the expiring coupon entity.
ApmEmployeeEnrollmentDigest	The *Manager Email Notifications for Enrollment Digest* automatic process runs.	Manager and alternate manger of employees that had an enrollment status change.
ApmExternalAssessmentReminder	Assessment Notification Automatic Process	External raters
ApmInitiativeEmployeeNotification	Initiative Notification Automatic Process, if plan goal is aligned to an initiative that was modified.	Users
ApmInitiativeOwnerNotification	Initiative Notification Automatic Process, if changes were made to published initiatives of the parent organization.	Organization owner

Template ID	Trigger	Recipient
ApmInitiativeRequiredReminder	Initiative Notification Automatic Process, if required initiatives were published to suborganizations and one or more suborganizations has failed to align by the target date.	Organization owner
ApmInstanceDelivery	Upcoming Class Reminder Email Notification Automatic Process	Users Managers The email address identified by the automatic process
ApmLearnerAssessmentReminder	Assessment Notification Automatic Process	Assessment rater
ApmPurchaseOrderLowBalance	The *Prepaid Account Low Balance Email Notification* automatic process runs.	The email address specified in the prepaid account contact information.
ApmQualificationCleanup	Curriculum Cleanup Automatic Process	The email address identified by the automatic process
ApmResetOnlineComponents	Reset Online Item Progress Automatic Process	The email address identified by the automatic process
ApmReviewCouldNotStartContactError	Review Initiation Automatic Process	The email address identified by the automatic process
ApmReviewInitiationContactError	Review Initiation Automatic Process	The email address identified by the automatic process
ApmReviewInitiationSummary	Review Initiation Automatic Process	The email address identified by the automatic process
ApmStudentLearningPlanNotification	Learning Plan Email Notification Automatic Process, if the user's learning plan changes	The email address identified by the automatic process Users
ApmSubscriptionExpiry	The *Free-of-Charge Subscription Expiration Email Notification* automatic process runs.	Subscribers whose free-of-charge subscription end date is less than the current date plus threshold period specified in the automatic process.
ApmSupervisorLearningPlanNotification	Learning Plan Email Notification Automatic Process, when a user completes an item.	The email address identified by the automatic process. Managers

Template ID	Trigger	Recipient
ApmSupervisorReviewIncompleteAssessment	Assessment Notification Automatic Process, if direct reports participating in a multirater assessment have overdue incomplete assessments.	Managers
ApmSynchronizeStudentChangesAssignmentProfile	Assignment Profile Execute Updates Automatic Process	The email address identified by the automatic process
ApmTrainingExpiration	The Learning Expiration Email Notification Automatic Process (APM) job identifies a Learning item that is nearing the due date. This is triggered when the number of days left to the required date for the item or the next action date for the curriculum is less than the number of days entered in the Threshold. If the *SuccessFactors Overdue Learning Email Notification* checkbox is unchecked, this notification also includes a list of overdue items.	The administrator whose email address is specified in the Learning Expiration Email Notification APM. Users who have Learning items nearing the due date (only if the *Users* checkbox is checked in *Email Recipients*). Managers of any users who have Learning items nearing the due date (only if the *Managers* checkbox is checked for *Email Recipients*).
ApmUpdateCatalogPrice	Change Library Price Email Notification Automatic Process	The email address identified by the automatic process
ApmUserRequestedSONotification	Class Request Demand Met Email Notification Automatic Process	The email address identified by the automatic process
ApmVlsAttendanceProcessing	Process VLS Attendance Automatic Process	The email address identified by the automatic process The email address identified in the *Contact Email Address* field in *Learning Activities* > *Classes* > *Details* (tab) for the class that is processed
ApmWaitlistRequest	Move Users from Waitlist to Request List Automatic Process	The email address identified by the automatic process Users managers
ApprovalProcessApprovalProgressed	Approval process new step reached	Users
ApprovalProcessApprovalRequired	Approval process initiated	Requested approver
ApprovalProcessApprovalWithdrawn	Approval request withdrawn	Users

Template ID	Trigger	Recipient
ApprovalProcessInitialRequest	Approval process initiated	Users
ApprovalProcessRequestApproved	Approval granted	Users
ApprovalProcessRequestDenied	Approval denied	Users
ApprovalProcessRequestExpired	The due date for an approval of an external learning request passes.	Users
AssessmentProcessAdministrator	Assessment Notification Automatic Process	The email address identified by the automatic process
AssessmentProcessAssessorApprover	Assessment Notification Automatic Process	Rater nomination approver
AssessmentProcessAssessorRemoved	Assessment Notification Automatic Process, if the rater was removed from the assessment process.	Rater when the rater is removed from the assessment process
AssessmentProcessAssessorsRejected	Assessment Notification Automatic Process, if the nominated rater isn't approved.	Rater nominator
AssessmentProcessCancellationAssessor	Assessment Notification Automatic Process, if the assessment is canceled.	Rater
AssessmentProcessCancellationAssessorApprover	Assessment Notification Automatic Process, if the assessment is canceled.	Rater nomination approver
AssessmentProcessCancellationNominator	Assessment Notification Automatic Process, if the assessment is canceled.	Rater nominator
AssessmentProcessCancellationReviewer	Assessment Notification Automatic Process, if the review option was enabled and the assessment is canceled.	Managers
AssessmentProcessExternalAssessor	Assessment Notification Automatic Process	External raters
AssessmentProcessInternalAssessor	Assessment Notification Automatic Process	Rater
AssessmentProcessNominatorRescheduled	Assessment Notification Automatic Process, if assessment start date changes	Rater nominator
AssessmentProcessNominatorStart	Assessment Notification Automatic Process	Rater nominator

Template ID	Trigger	Recipient
AssessmentProcessReviewer	Assessment Notification Automatic Process, if the review option was enabled.	Managers
BackgroundJobNotification	A background job is complete A *Remove Contents from Curriculum* or *Add Sub-Curricula to the Curriculum* background job has been either postponed or canceled due to a scheduling conflict with another curriculum background job	Background job email (administrator entered)
BackgroundReportJobNotification	Background report job complete	Background report job email (administrator entered)
CareerPlannerTargetJobPositionChange	User changes targeted job position.	Managers
CERTIFICATE_OF_COMPLETION	History record added, administrator email certificate.	Users
ContentDeploymentNotification	Content is imported though the application UI	Email address specified when scheduling the job **or** the email address configured in the SFTP location for IContent
DelegateeEmail	A user (called a delegator) identifies another user to act as a delegate, then the system generates this notification when the delegator is set to receive a notification for one of the permissions that was granted to the delegate.	A delegated user
DelegationAssignment	A user identifies another user to act as a delegate, changes one or more permissions for an existing delegate, or reactivates delegated permissions.	A delegated user
EnrollmentSlotCancellation	Seats removed from class	Organization email
EnrollmentSlotChangeConfirmation	Seats changed on class	Organization email
EnrollmentSlotConfirmation	Seats created for class	Organization email
ESigPinExpiredNotification	E-signature expiration	Users
ESigPinFailedNotification	E-signature verification unsuccessful	The email address identified by the automatic process

Template ID	Trigger	Recipient
ExpiredCatalogItemsNotification	Purge Expired Library Items Automatic Process	The email address identified by the automatic process The email address identified by the library
ExternalLearningRequestApprovalRequired	A user or administrator submits an external training request form.	Approver
ExternalLearningRequestVerificationRequired	A class has occurred and a user or administrator submits an external training request for verification.	Approver
ExternalVerificationReminder	User completes an external learning activity.	Approver
FollowupEvaluationAssignmentNotification	This notification is triggered in one of these ways: • The Evaluation Synchronize Automatic Process Manager (APM) runs and finds assignments to be made according to your configuration. • A user reassigns the survey from the To Do panel. In this case, the substitute specified receives the notification.	Managers A substitute for the manager if the survey is reassigned.
IDPApproval	User plan is approved.	Users
IDPApprovalCancelledBySystem	User's manager changed while plan was awaiting approval.	Users
IDPApprovalRequest	User submits plan for approval.	Managers
IDPExpiration	User plan expired (expiration date reached and Expired Plans Automatic Process runs).	Users
IDPExpirationNotification	User plan about to expire (plan template expiration threshold reached).	Users
IDPInactiveApproval	Inactive plan (effective date in the future) was approved.	Users
IDPNote	Note added to plan by manager or coach. Plan Note Automatic Process runs.	Users
IDPReject	Plan rejected.	Users

Template ID	Trigger	Recipient
IlxTrainingOverdue	Triggered by the manager.	Users and Managers (if the manager is copied)
InstructorAssignmentNotification	• Administrator goes to *Learning Activities* > *Classes* > *Add New*, assigns instructors, and selects *Notify Instructor*. • Administrator goes to *Learning Activities* > *Classes*, opens the class, then chooses *Notify Instructors*. • Administrator copies a class.	Instructors
ItemEvaluationAssignmentNotification	Users are assigned a new survey. Assignment occurs in one of two ways: • When a history record is added through the Add to Learning History wizard for the learning item with the survey, a user completes the course and the completion is entered into the system. • An administrator goes to the *Actions* menu of the class and chooses *Initiate Evaluations*.	Users
JamGroupInvitation	An administrator sets one of the available invitation settings while associating an item with a Jam group (*Learning Activities* > *Items* > *Jam Groups*).	Users who meet the invitation setting criteria.
ObserverNotification	User requests observation of a task checklist.	The nominated observer
PasswordNotification	User requests a new password or when an administrator creates a new user entity and the `enableRandomPasswordGenerationForNewUsers` property in the LMS_ADMIN configuration ID (*System Administration* > *Configuration* > *System Configuration*) is set to true.	Users

Template ID	Trigger	Recipient
PreExpirationNotificationForCatalogItems	Purge Expired Library Items Automatic Process	The email address identified by the automatic process The email address identified by the library
ReassignStudentComponentNotification	User reassigned item.	Users
ReviewProcessReviewApproval	Review sent for approval / signature. ("notify approver" option set at review process level.)	Approver for the current step
ReviewProcessReviewApprovalDenied	An approver chooses *Deny* in the user interface during the performance review approval process.	Managers
ReviewProcessReviewCreatedEmployee	Review initiated for user.	Users
ReviewProcessReviewCreatedSupervisor	Review initiated for user.	Managers
ReviewProcessReviewDeadlinePassed	Review is past due (send for signature; deadline is in the past).	Managers
ReviewProcessReviewFeedbackRequired	Feedback rater selected by manager.	Feedback rater
ReviewProcessReviewNeeded	Review initiated (trigger option is ongoing and "notify only" selected). Allow manager initiated review.	Managers
ReviewProcessReviewPublished	Review completed, approved, and published.	Users
ReviewProcessReviewReminder	Review initiated; awaiting user / manager action. ("reminder" email is enabled at the review process level.)	Managers Users (user to whom the reviewed is currently assigned)
ReviewProcessReviewSubmittedEmployee	Review submitted by manager. Awaiting user action. ("notify user / manager when a new step in the process is reached" is enabled at the review process level.)	Users
ReviewProcessReviewSubmittedSupervisor	Review submitted by user. Awaiting manager action. ("notify user / manager when a new step in the process is reached" is enabled at the review process level.)	Managers
SystemScheduleCancellationNotification	Administrator removes a user from a class.	User who was removed

Template ID	Trigger	Recipient
SELF_REGISTRATION_ADMIN	A user self-registers and approval isn't enabled.	Application Notification Admin Email (*System Administration* > *Configuration* > *Global Application Settings* > *Mail*)
SELF_REGISTRATION_STUDENT	Users who create their own accounts.	Users
SystemEnrollmentNotification	Administrator, manager, or user (self-registration) registers the user in a class.	Contacts Instructor Managers Users The administrator can choose the recipients. However, if the user self-registers, then all groups are notified.
SystemPendingEnrollmentNotification	User self-registers in a class with an approval process. SystemPendingEnrollmentNotification will be suppressed when the ApprovalProcessInitialRequest notification is sent.	Contacts Instructor Managers Users
SystemScheduleCancellationNotification	A class is canceled.	Contacts Instructor Managers Users The administrator can choose the recipients.
SystemUnenrollmentNotification	User or administrator withdraws the user from a class. **Note** No notification is sent when a class approval is denied or expires.	Contacts Instructor Managers Users The administrator can choose the recipients. However, if the user self-withdraws, then all groups are notified.

Template ID	Trigger	Recipient
SystemWaitlistNotification	User or administrator registers the user with a waitlist status.	Contacts Instructor Managers Users The administrator can choose the recipients. However, if the user self-registers, then all groups are notified.
SystemWaitlistRemovalNotification	Administrator changes the user's waitlist status.	Contacts Instructor Managers Users The administrator can choose the recipients. However, if the user is automatically registered through auto-fill, then all groups are notified.
UserCreatedAccountApprovalRequired	User self-registers for an account that requires approval.	The approvers that need to approve the request for a new account.
UserCreatedAccountApproved	Last approver in the approval workflow approves the self-registration account request.	User
UserCreatedAccountDenied	Any approver in the approval workflow denies the self-registration account request.	User
UserCreatedAccountReminder	The *User-Created Account Approval Reminder* automatic process runs.	The approvers that need to approve the request for a new account.
VLE_ENROLLMENT	A VLS is assigned to the time slot **after** users have already been enrolled.	Users
VLE_EVENT_CREATION	This notification is triggered in one of these ways: • A class time slot has a VLS server applied to it. • A new primary instructor is added. Only the new primary instructor receives this notification. • A secondary instructor is added. Only the new secondary instructor receives this notification.	Primary instructor Secondary instructors

Template ID	Trigger	Recipient
VLE_EVENT_DELETION	This notification is triggered in one of these ways: • A virtual learning event is canceled. • A class time slot has a VLS server value removed. • The primary instructor changes. Only the former primary instructor receives this notification. • A secondary instructor is removed. Only the former secondary instructor receives this notification. • A secondary instructor replaces the primary instructor. Only the former primary instructor receives this notification.	Primary instructor Secondary instructors Users
VLE_EVENT_UPDATE	This notification is triggered in one of these ways: • The primary instructor changes. Only preexisting secondary instructors receive this notification, as long as their role hasn't changed. • A class time slot's date, description, location, or session details are modified. • A secondary instructor replaces the primary instructor. • A secondary instructor swaps roles with the primary instructor.	Primary instructor Secondary instructors

Template ID	Trigger	Recipient
VLE_EVENT_UPDATE_STUDENTS	This notification is triggered in one of these ways: • A class time slot has VLS and then the user enrolls in the class. • A class time slot's date, description, location, or session details are modified. • The primary instructor changes. • A secondary instructor replaces the primary instructor. • A secondary instructor swaps roles with the primary instructor. **Note** When Microsoft Teams, Zoom, Webex Training Center, or Webex Meeting Center is the selected VLS, modifying the primary instructor creates a new session. If a change is made to the primary instructor for a user's class time slot, the user receives an email notification with an updated link to join their session.	Users
VLE_UNENROLLMENT	Users are unenrolled from a class with a VLS component.	Users
DisableRecurringReportJobNotification	An administrator disables the recurring report job.	Administrators
PasswordResetNotification	A user requests to reset their password.	Users
TrainingNeedsMakeAssignmentNotificationToSupervisor	A manager receives notification to make assignments.	Managers
TrainingNeedsModifiedBySupervisor	A manager modifies training needs.	Users
TrainingNeedsRejectedByOrgOwner	Organization Owner (Training Manager) rejects training needs.	Users
TrainingNeedsRejectedByOrgOwnerForSupervisor	Organization Owner rejects training needs on behalf of a manager.	Managers
TrainingNeedsRejectedBySupervisor	A manager rejects training needs.	Users
TrainingNeedsRequested	A user requests training needs.	Managers

Template ID	Trigger	Recipient
UserRecordedCompletionApprovalProcessApprovalRequired	An approval process is enabled for users to post learning events and an approver is in the approval process.	The following recipients are notified: • Pending approvers to take action on the approval. • Users to inform that the request has already been progressed.
UserRecordedCompletionApprovalProcessRequestApproved	An approval process is enabled for users to post learning events and the approval request is approved.	Users
UserRecordedCompletionApprovalProcessRequestDenied	An approval process is enabled for users to post learning events and the approval request is denied.	Users
ApmRecommendationsNewsletter	The Recommendation Newsletter Automatic Process job is completed.	Users (with valid email ID) who has recommendations.
ExternalLinkRecommendations	External links are recommended through the following ways: • *Learning Activities* > *External Links* > *[create a new external link or modify an existing link]* > *Recommend* > *Recommend And Notify*. • *Learning Activities* > *External Links* > *[create a new external link or modify an existing link]* > *Recommend* > *Send Reminder*.	Users (with valid email ID) to whom the external link is being recommended.
SensitivePrivateDataGDPRNotification	New fields that are added in Learning as part of the SF User connector are identified as Sensitive Personal Data (SPD) and will be cleared.	Recipients of this notification are configured using the `SensitivePrivateDataContactEmailList` setting in the *BIZX* configuration file.
ApmTrainingOverdue	The Learning Expiration Email Notification Automatic Process (APM) job identifies an overdue Learning item and the Reminder Period is set. This notification is only triggered when the *SuccessFactors Overdue Learning Email Notification* checkbox is checked.	The administrator whose email address is specified in the Learning Expiration Email Notification APM. Users who have overdue Learning items that are picked up by the APM (only if the *Users* checkbox is checked for *Email Recipients*). Managers of any users who have overdue Learning items that are picked up by the APM (only if the *Managers* checkbox is checked for *Email Recipients*).

Template ID	Trigger	Recipient
NativeUserDelete	The Native User Deletion Automatic Process (APM) job is completed.	The administrator whose email address is specified in the Native User Deletion APM.
UserPurge	The Purge Deleted User Audit History Automatic Process (APM) job is completed.	The administrator whose email address is specified in the Purge Deleted User Audit History APM.
ApmLearningReminder	The *Learning Reminder Email Notification* job is completed.	Users and managers receive email reminders based on the configured template.

23.4.19.16 Notifications Sent by VLS Attendance Processing

The VLS Attendance Processing Automatic Process Manager (APM) sends these notifications.

The automatic process notifies the distribution list with the amount of VLS events that had attendance data successfully retrieved and the amount of learning events recorded. It also triggers the record learning event trigger, which sends its own emails.

VLS Attendance Processing Notifications

Recipient	Purpose
The email address identified in *System Administration* > *Automatic Processes* > *Process VLS Attendance*	To notify administrators about the success of the automatic process.
The email address identified in the *Contact Email Address* field in *Learning Activities* > *Classes* > *Details* (tab).	In addition to the information sent to the distribution list you identify here, the automatic process sends an email to the class contact about when the learning events were recorded.
Users who attended classes with VLS time slots.	The VLS attendance processing automatic process sends notifications if it finds a user who has attended a session of the virtual classrooms in the past but the data for the VLS attendance has not been retrieved and recorded.

Related Information

Template ID to Trigger to Receiver Map [page 1160]
Approval Processes Templates [page 1153]
VLS Attendance Processing Templates [page 1156]

23.4.19.17 Legacy Notification Template Editor

The legacy SAP SuccessFactors Learning notification template editor can create notifications for your learning events.

When events occur in SAP SuccessFactors Learning, users of the system receive notifications. For example, when users are enrolled, they receive an enrollment notification email. The email that they receive is called a notification message.

> ⓘ Note
>
> Importantly, SAP SuccessFactors Learning notifications that are sent from templates are always email messages, as opposed to the web notifications in the header of the SAP SuccessFactors user interface.

Notification messages are generated from a notification template, which contains the words that the recipients see in their email messages. To edit the templates, you can use the legacy template editor or you can use the rich editing experience of the notification editor. We recommend that you use the notification editor because you can see what your notification look like when users receive it.

The legacy notification editor uses plain text, HTML (including direct links), syntax tags, and one or more attachments. To use it, understand field, merge, and looping strategies like Microsoft Word uses in mail merge. You also need to understand the code of HTML and how email messages are formatted for your organization.

23.4.19.17.1 Viewing Original Email Notification Templates

View original email notification templates when you want to return to the content that SAP SuccessFactors Learning delivered originally.

Context

If you edited email notification templates and you want to compare your changes to the original email notification template provided by SAP SuccessFactors Learning, you can view the original content. This can be useful, for example, if you edit the template and the edits aren't working for you. View the content of the default template to start over from the original content as it was delivered on the first day of your implementation.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Manage Email* > *Email Notification Templates*.
2. Search for and open the email notification template that you want to investigate.
3. Go to *Messages* and then click *View Default*.

23.4.19.17.2 Legacy Notification Templates Editor Sections

If you use the legacy notification templates editor, you should understand how to use its sections.

We continue to release the legacy notification templates editor to give customers time to adopt the new rich text notification editor. We recommend that you move to the new editing experience.

To find the legacy notification editor, go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Manage Email* > *Email Notification Templates*. You see three sections.

- *Summary*: You can describe the template and you can define a notification syntax to be associated with the template.
- *Messages*: You can control the messages that are sent to different user groups who receive the message. Unless you've customized the notification system, you can define the subject and the body of the message. Each notification template can have multiple subjects and bodies depending on how the notification template functions. For example, if a notification template generates run-time messages to both users and supervisors, it might define one subject for users and one subject for supervisors. Click *Syntax Tags* to see the list of syntax tags that are allowed for this message.
- *Attachments*: You can define an attachment to be sent with the messages generated from the template at run time. The message ID and description don't appear in the message, they are for system use only. The attachment is sent to users via the SMTP server at run time.

23.4.19.17.3 Using Locale Labels to Translate Notifications (Legacy Editor)

In the legacy SAP SuccessFactors Learning notification editor, labels store the actual words that users read in notifications, so they're the lowest level of configuration and critical to translating your notifications.

> ⚠ Caution
>
> If you're using the rich text notification editor, this section does **not** apply to you.

You can use labels and locale labels (if your system supports a multi-language environment) to customize any notification template. Every label contains two parts: a label key (including an equal sign) and a label value.

> ⚠ Caution
>
> To see a list of your notification labels (label key and label value), export them to a file (*References* > *Manage Labels* > *Label Import/Export*). We strongly recommend that you create new labels instead of using the default ones. To understand why, please read Why You Should Create New Label IDs for Customizations [page 1179].

Label Key	English Label Value	What the English User Reads
notification.ApmAdminAssessmentReminder.MessageText1=	Assessment Reminder has been sent to the following Raters	"Assessment Reminder has been sent to the following Raters"

Label Key	English Label Value	What the English User Reads
notification.ApmAdminAssessmentReminder.MessageText2=	Rater ID \: {0} ({1}) for the process \: {2} ({3})	"Rater ID \: bsmith (Bob Smith) for the process \: AP_100 (Training Approval)"
notification.ApmAdminAssessmentReminder.Subject=	Assessment Reminder List	"Assessment Reminder List"

To use a label in a notification, you must know its label key and insert that label key in the notification as shown below:

```
<label key="notification.ApmAdminAssessmentReminder.MessageText1" />
```

If the label you want to use contains arguments, as in the label shown in the second row of the previous table, then you must which arguments to use, as shown below:

```
<label key="notification.ApmAdminAssessmentReminder.MessageText2"
    arg0="<ASSESSOR_ID/>"
    arg1="<ASSESSOR_NAME/>"
    arg2="<PROCESS_ID/>"
    arg3="<PROCESS_TITLE/>"
/>
```

When SAP SuccessFactors Learning Administration creates a notification message, it checks the user's active locale ID, which a user can set in the user interface. An administrator, too, can configure the active locale ID for each user in SAP SuccessFactors Learning Administration (*People* > *Users* > *Preferences* > *Active Locale ID*). After SAP SuccessFactors Learning Administration determines the correct locale, it replaces the label placeholder with the label value when the system creates the e-mail message. The system also replaces the syntax tag ID placeholder with the appropriate information and processes any HTML tags or direct links.

Related Information

Why You Should Create New Label IDs for Customizations [page 1179]
Creating Labels to Customize the Text that Users See [page 1177]

23.4.19.17.3.1 Creating Labels to Customize the Text that Users See

If you're using the legacy notification editor, then you create labels to change what users see in their email notifications.

> ⚠ Caution
>
> If you're using the new rich text notification editor, this section doesn't apply to you.

You can create labels for any locale by adding them in *References* > *Manage Labels* > *Labels*. If you have to create several labels, then we recommend that you import a file in *Label Import/Export* because you can create

numerous labels more efficiently by using a word processor. If you need to create only a few labels, then we recommend that you create them in *References* > *Manage Labels* > *Labels*.

Related Information

Using Locale Labels to Translate Notifications (Legacy Editor) [page 1176]
Creating Labels to Customize the Text that Users See [page 1177]

23.4.19.17.3.2 Using Labels

View this section if you want to know about using labels when editing a notification template.

You can use labels and locale labels (if your system supports a multi-language environment) to customize any notification template. Every label contains two parts: a label key (including an equal sign) and a label value. The following table shows some example labels for notifications:

Label Key	Label Value
notification.ApmAdminAssessmentReminder.MessageText1=	Assessment Reminder has been sent to the following Raters
notification.ApmAdminAssessmentReminder.MessageText2=	Rater ID \: {0} ({1}) for the process \: {2} ({3})
notification.ApmAdminAssessmentReminder.Subject=	Assessment Reminder List

To use a label in a notification, you must know its label key and insert that label key in the notification as shown below:

```
<label key="notification.ApmAdminAssessmentReminder.MessageText1" />
```

If the label you want to use contains arguments, as in the label shown in the second row of the previous table, then you must which arguments to use, as shown below:

```
<label key="notification.ApmAdminAssessmentReminder.MessageText2"
arg0="<ASSESSOR_ID/>" arg1="<ASSESSOR_NAME/>" arg2="<PROCESS_ID/>"
arg3="<PROCESS_TITLE/>"/>
```

When SAP SuccessFactors Learning Administration creates a notification message, it checks the user's active locale ID, which a user can set in the user interface (*Active Locale ID*). An administrator, too, can configure the active locale ID for each user in SAP SuccessFactors Learning Administration (*People* > *Users* > *Preferences* > *Active Locale ID*). After SAP SuccessFactors Learning Administration determines the correct locale, it replaces the label placeholder with the label value when the system creates the e-mail message. The system also replaces the syntax tag ID placeholder with the appropriate information and processes any HTML tags or direct links.

If you want a list of all the notification labels (label key and label value), then you can export them to a file (*References* > *Manage Labels* > *Label Import/Export*). Follow the Label Import/Export wizard; when you are ready to identify the labels to export, click the *add one or more from list* link. We recommend that you search for labels based on the label ID or label type ID. (To do so, you might need to click *Add/Remove Criteria* to add these

options to the search framework.) You should ignore case sensitivity, select *Starts With*, and type "notification" in the associated box. When you click *Search*, SAP SuccessFactors Learning Administration returns all the notification labels. Complete the Label Import/Export wizard to create a file that contains all the notification labels.

23.4.19.17.3.3 Why You Should Create New Label IDs for Customizations

This topic explains why you should create new labels instead of using the system default labels.

> ⚠ Caution
>
> If you are using the new rich text notification editor, this section does **not** apply to you.

You can modify any label value for any label key in any locale (*References* > *Geography* > *Labels* > *Locales* >). But if you customize the label value, then you could overwrite your customization when you apply an update: the label can set back to its default. Therefore, for notification labels, we recommend that you create a new label for each notification label.

For example, you could export all of the notification labels and use a word processor to replace `notification.` with `notification.<nameofcompany>.`. By using this method, you could ensure that software updates not eliminate your customized labels for notifications.

Related Information

Using Locale Labels to Translate Notifications (Legacy Editor) [page 1176]
Creating Labels to Customize the Text that Users See [page 1177]

23.4.20 SAP SuccessFactors Learning Notification Email Management

After you enable and configure SAP SuccessFactors Learning notification emails, you perform day-to-day management of the notifications.

After you configure notification emails, you manage notifications:

- You often make exceptions to default notifications: override the recipients of roster changes in classes, change the registration email in a course or class, and so on.
- You often send a one-time message (ad hoc message) to learners.
- You propagate changes to notifications.
- You should run the notification processes weekly or daily.

23.4.20.1 Overriding Learning Expiration Notification at the Learning Item Level

Override the default settings of the learning expiration email notification at the learning item (course) level if the learning item needs special treatment.

Context

In most cases, every learning item can use the same learning expiration email notification settings. You set the default values in the Learning Expiration job configuration: *System Administration* > *Automatic Processes* > *Learning Expiration Email Notification*. In a few cases, however, you can override the default settings for one learning item. The Learning expiration defaults (Threshold and Reminder period, Email recipients such as, User, Manager) are copied from the Learning Expiration APM to the item during creation. After the item is created, the default values have to be maintained at the item level only, to act as override values. They don't fall back to the values at the APM level. The next time that the Learning Expiration process runs and processes this learning item, it uses this learning item's unique settings instead of the default values.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that needs the unique learning expiration settings.
3. Choose *Email Notifications*.
4. Go to *Override Learning Expiration Notification Defaults*.
5. In *Email Recipients*, decide who receives the learning expiration email notification.

When you select this...	...The following recipients get the email notification
User	The user whose learning is expiring within the threshold of days. This is the user responsible for completing the expiring learning content.
Manager	The managers of the user whose training is expiring.

6. In *Threshold*, type the number of days into the future that the process checks for a next action date (for curricula) or a required date (for learning items).

   For example, if you type **30** in *Threshold*, then when the Learning Expiration automatic process next executes, it looks 30 days into the future. If it finds any users with courses due in the next 30 days, it sends the email notification.

7. In *Reminder Period*, type the number of days that the process needs to wait to send a reminder.
   If you type **30** in *Threshold* and **7** in *Reminder Period*, then a user receives up to four email notifications (one message every 7 days for 30 days before the required or next action date) that remind them to complete the item. That is, if you execute the automatic process every day, then the user receives four reminders; if you run the process every 2 weeks, then the user receives two reminders.

> **Note**
>
> The reminder date and time are calculated when the Learning Expiration Email Notification automatic process runs and are based on the reminder period associated with the automatic process setup (or item setup, if that was overridden). Changes to the reminder period aren't considered until after the previously set reminder date and time have passed.

Learning Expiration Notification APM User Cases

APM Schedule	Threshold	Reminder	Assignment Date	Required Date	APM Run Date and Time	Record Picked Up By APM?	Next User Reminder Date and Time	Next APM Run Date and Time	Record Picked Up By APM?	Next User Reminder Date
Monthly	30	7	01 JAN 2023 08:00 AM	01 FEB 2023	15 JAN 2023 03:00 AM	Yes	22 JAN 2023 03:00 AM	15 JAN 2023 03:00 AM	Yes	22 JAN 2023 03:00 AM
Weekly	30	7	01 JAN 2023 08:00 AM	01 FEB 2023	02 JAN 2023 03:00 AM	Yes	09 JAN 2023 03:00 AM	09 JAN 2023 03:00 AM	Yes	16 JAN 2023 03:00 AM
Daily	30	7	01 JAN 2023 08:00 AM	01 FEB 2023	01 JAN 2023 03:00 AM	Depends on the Required Date time-stamp. The required date should be **less than or equal to** the APM time-stamp plus threshold.	08 JAN 2023 03:00 AM	02 JAN 2023 03:00 AM	No	08 JAN 2023 03:00 AM

> **Note**
>
> - Times used as examples in the table are in UTC (database time zone). Please consider your current system preferences when troubleshooting.
> - Users have until the end of the day (i.e. 11:59 PM) on the Required Date to complete the course before it is considered overdue.

8. Choose *Apply Changes*.

Related Information

Propagating Learning Expiration Automatic Process Default Settings to All Active Learning Items [page 1193]

23.4.20.2 Overriding Course Notifications on the Learning Item Level

Override notifications at the learning item level if you have a learning item that is a special case: one that cannot use the standard notification template.

Context

In most cases, you can use a generic notification template for all registration, cancellation, withdrawl, and other course notifications for all courses. In some cases, you might want to override the notifications at the learning item level. When you override the notification at the learning item level, all classes for that learning item inherit the unique notification for the learning item, not the generic one.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find and open the learning item that needs the unique notifications.
3. Click *Notifications*.

   > → Tip
   >
   > Depending on how your administrator environment is configured, you might need to click *More* to see *Notifications*.

4. Locate the notification you want to change by its section.

   For example, if you want to edit the notification for the cancellation of classes based on this learning item, go to *Edit the Class Cancellation Notification for the Item*.
5. Click *Launch Editor* in the section.
6. Use the editor to modify the content of the template.
7. Select *Use Editor Content When Sending Email Notification*.
8. To attach a unique file with this notification, go to *New Attachment* and then click *Choose File*.

23.4.20.3 Overriding Course Notifications on the Class Level

Override notifications at the class level if you have a class that is a special case: one that can't use the standard notification template **and** can't use an override at the learning item level.

Context

In most cases, you can use a generic notification template for all registration, cancellation, withdrawal, and other course notifications for all courses. In some cases, you want to override the notifications at the learning item level. When you override the notification at the learning item level, all classes for that learning item inherit the unique notification for the learning item, not the generic one. In a few cases, you might want to override the unique notification of the **learning item** for an individual class. For example, you might want to write special registration instructions for an offering that is scheduled in an uncommon location.

In *Learning Activities* > *Classes* > *Notifications*, you can view and modify the registration, cancellation, withdrawal, and waitlist notifications that the system sends to users, supervisors, instructors, and other contacts who are associated with this class. You identify contacts in *Classes* > *Contacts*.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that needs the unique notifications.
3. Click *Notifications*.

   > → Tip
   >
   > Depending on how your administrator environment is configured, you might need to click *More* to see *Notifications*.

4. Locate the notification you want to change by its section.

   For example, if you want to edit the notification for the cancellation of classes based on this learning item, go to *Edit the Class Cancellation Notification for the Class*.
5. Click *Launch Editor* in the section.
6. Use the editor to modify the content of the template.
7. Select *Use Editor Content When Sending Email Notification*.
8. To attach a unique file with this notification, go to *New Attachment* and then click *Choose File*.

23.4.20.4 Creating Course Registration Instructions

Create course registration instructions for users so that when they receive notifications about enrollment or cancellation, they know what to do.

Prerequisites

Enable notifications and check these templates, which are used for registration instructions:

- SystemWaitlistNotification
- SystemPendingNotification
- SystemUnenrollment Notification
- SystemScheduleCancellationNoticification
- SystemEnrollmentNotification
- ApmInstanceDelivery

Procedure

1. Log in to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Items*.
2. Find the learning item that requires special registration instructions and open it.
3. Go to *More* > *Notifications*.
4. In the *Edit Registration Text* section, click *Edit*.
5. For each language that you have installed, type your registration information and then save it.
6. Go to the notification where you want to add registration text.

Location	Why you edit notifications in this location
System Administration > *Manage Email* > *Email Notification Templates*	The notifications in the *Configuration* section are the default configurations that are triggered by events (such as enrollment or withdraw) and by Automatic Process Managers (APM).
Learning Activities > *Items* > *More* > *Notifications*	The notifications in *Items* supersede any notifications in the *Configuration* section for the particular learning item. See the headings of the page to understand when the notifications are sent.
Learning Activties > *Classes* > *More* > *Notifications*	The notifications in *Scheduled Offering* supersede any notifications in the *Item* or *Configuration* sections for the particular scheduled offering. By default, classes inherit their notifications from the learning item. See the headings of the page to understand when the notifications are sent.

7. Add the following syntax tags to the notification as necessary.

   Not all notifications can use these syntax tags. To check if your notification can use them, click *Syntax Tags* for any notification.

Syntax Tag	Description
<CPNT_INSTRUCTIONS/>	This contains the learning item registration instructions that you wrote in *Learning* > *Items* > *Notifications*.
<CPNT_INSTRUCTIONS_ADDED/>	This syntax tag contains the same contents as <CPNT_INSTRUCTIONS/>, but the notification syntax group APM_STUDENT_LEARNING_PLAN_NOTIFICATION requires the _ADDED, _MODIFIED, and _DELETED convention.
<CPNT_INSTRUCTIONS_MODIFIED/>	This syntax tag contains the same contents as <CPNT_INSTRUCTIONS/>, but the notification syntax group APM_STUDENT_LEARNING_PLAN_NOTIFICATION requires the _ADDED, _MODIFIED, and _DELETED convention.
<CPNT_INSTRUCTIONS_DELETED/>	This syntax tag contains the same contents as <CPNT_INSTRUCTIONS/>, but the notification syntax group APM_STUDENT_LEARNING_PLAN_NOTIFICATION requires the _ADDED, _MODIFIED, and _DELETED convention.

Next Steps

Classes automatically inherit the instructions of their learning items. If you want to write instructions specific to the scheduled offering, go to *Learning Activities* > *Classes* > *Notifications* and click *Edit* in the *Edit Registration Text* area.

23.4.20.5 Setting Notification Preferences for Class Registration Lists

Set the notification preferences for class notification lists to control the people in the class receive notifications about the roster.

Context

Classes have many types of users attached to them: instructors, learners, contact people, and so on. You can control the recipients of email for a particular class when SAP SuccessFactors Learning changes a registration status.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that you want to manage.
3. Click *Registration*
4. Click *Settings*.
5. In *Send Notifications to*, select the type of users who should receive notifications.

Type of User	Description
User	Users are the learners in the class. They can have different registration status values: waitlisted, registered, or pending registration.
Supervisor	Supervisors are the managers of the users who are in the class.
Instructor	Instructors include any instructor of any time slot in the class.
Contacts	Contacts are usually people who should be informed of changes to the class. For example, an administrator who is responsible for the scheduling.

6. To email the organization owner about changes to reserved seats, select *E-mail Slot Confirmations to* > *Organizations*.
7. Click *Save*.

23.4.20.6 Sending Email Messages to Groups of SAP SuccessFactors Learning Users

Send email messages to specific groups of SAP SuccessFactors Learning users when you want to communicate with all users in a course, a curriculum, and so on.

Context

As an administrator, you often need to get a message to all users assigned to a learning event. For example, if the room for a course changes at the last minute, you want to make sure that the users in that course get an email notifying them of the change. You can use the *Send Notifications* wizard to send those kinds of communications.

You can launch the *Send Notifications* wizard by going to *Manage User Learning* > *Send Email Notifications* and look up the learning event that defines the recipients (look up a class, for example, and send a message to all users in that class). You can also start at the record (for example, in the class at *Learning Activities* > *Classes* and click *Email Notifications*. When you start at the record, SAP SuccessFactors Learning passes the learning event to the wizard so that you do not need to look it up.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Manage User Learning* > *Send Email Notifications*.
2. In *Step 1*, select the SAP SuccessFactors Learning event type that contains the users you want to send an email to.

   For example, if you want to send a message to all users in a program, select *Program*.
3. Click *Next*.
4. In *Step 2*, select the exact objects that you want to send messages to.

   For example, if you want to send messages to users in PROG-100 and PROG-200, find those programs and add them to the list.
5. In *Step 3*, reduce the population by their attributes.

   - *Any Type* sends a message to users who have any assignment type **except** users with blank (null) item assignments
   - *No Type* sends a message to users who have no item assignment types (null: they do not have an assignment type)
   - *Any Completion Status* sends a message to any user who has attempted the learning event (the event is in their learning history)
   - *No Completion Status* sends a message to users who do **not** have any history of the event

   For example, you can send a message to uses who have completed a curriculum or users who are incomplete in the curriculum. You might want to send a message that time is running out to complete the curriculum. That message should go to incomplete users only.

   > **Note**
   >
   > If you base your group of users on a class, then there are no filter options, and the wizard skips Step 3.
6. In *Step 4*, add the specific users who should receive the communication.

   You can, for example, search for users in a specific region who were assigned a class and send the message to only those users.
7. In *Step 5*, you create the message that you want to send.

Choice to create message	How you use the choice
Email Template	You can select a template to send a pre-written message to users. You might, for example, want to re-send the enrollment boilerplate message.
Reply To	You can elect to have users' replies to the message go to a specific address. If you do not provide a reply-to address, then replies go to the address in *From*.
From	This is the address that the message comes from.
Send copies to	When you select recipients to receive copies, type them here. We caution you from using this option with large distribution lists because the recipients receive one copy for each user receiving the message: if you are sending the message

Choice to create message	How you use the choice
	to 1000 users, the addresses in *Send copies to* receive 1000 messages.
Second copy of email to users' managers	When you select this, users' managers get a copy of the message. The subject line of the manager's message is prefixed by "Copies of email sent to your employees." **Note** HRBPs and Alternate Managers will not get a copy of the message.
Customize Contents	The options in *Customize Contents* send a totally custom message as opposed to the pre-written template.

8. Click *Send Notification*.

Sending a Notification Email from SAP SuccessFactors Learning to an Individual User [page 1188]
Send a notification email from SAP SuccessFactors Learning to an individual user if you need to communicate with the user and you want the notification to come from SAP SuccessFactors Learning through standard processes instead of from **your** account as an administrator.

Sending Ad Hoc Communication with All Users Assigned to a Learning Item [page 1189]
If you need to send a one-time message to all users who are assigned to a learning item, you can send that message as an email from SAP SuccessFactors Learning.

Sending Ad Hoc Communication with All Users Assigned to a Class [page 1190]
If you need to send a one-time message to all users who are assigned to a class, you can send that message as an email from SAP SuccessFactors Learning.

Syntax Tags Used in Ad Hoc Notifications [page 1191]
View this section if you want to know about syntax tags used in ad hoc notifications.

23.4.20.6.1 Sending a Notification Email from SAP SuccessFactors Learning to an Individual User

Send a notification email from SAP SuccessFactors Learning to an individual user if you need to communicate with the user and you want the notification to come from SAP SuccessFactors Learning through standard processes instead of from **your** account as an administrator.

Context

When you send a notification from the application rather than from your own email account, you follow your organization's standard for communicating with users about learning issues.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *People* > *Users*.
2. Find and open the user who you want to email.
3. In *Actions*, click *Send Notifications*.

Results

You go to the last step of the Send Notifications wizard. The system goes to the last step because all the preceding steps help you narrow the users who receive the message. In this case, you're sending the message to only the current user.

Task overview: Sending Email Messages to Groups of SAP SuccessFactors Learning Users [page 1186]

Related Information

Sending Ad Hoc Communication with All Users Assigned to a Learning Item [page 1189]
Sending Ad Hoc Communication with All Users Assigned to a Class [page 1190]
Syntax Tags Used in Ad Hoc Notifications [page 1191]

23.4.20.6.2 Sending Ad Hoc Communication with All Users Assigned to a Learning Item

If you need to send a one-time message to all users who are assigned to a learning item, you can send that message as an email from SAP SuccessFactors Learning.

Prerequisites

SAP SuccessFactors Learning sends your communication as an email, which means that the users in the learning item must have an email address and your implementation must be connected to an email server.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *Learning Activities* > *Items*.

2. Find and open the learning item that is assigned to the users who you want to communicate to.
3. In *Actions*, click *Send Notification*.

Results

When you click *Send Notification*, you launch the *Send Notifications* wizard with the recipient population prepopulated to all users of this learning item.

Task overview: Sending Email Messages to Groups of SAP SuccessFactors Learning Users [page 1186]

Related Information

Sending a Notification Email from SAP SuccessFactors Learning to an Individual User [page 1188]
Sending Ad Hoc Communication with All Users Assigned to a Class [page 1190]
Syntax Tags Used in Ad Hoc Notifications [page 1191]

23.4.20.6.3 Sending Ad Hoc Communication with All Users Assigned to a Class

If you need to send a one-time message to all users who are assigned to a class, you can send that message as an email from SAP SuccessFactors Learning.

Context

Often, you need to send a notification to a group of users who are associated with a class. For example, you might want to notify instructors of a change in location. You build the notification with the standard Send Notification tool. You skip the first few steps of the wizard because those steps identify the record that the recipients share. The system knows that you mean to send a notification to users associated with this class because you launched the wizard from the class record.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Learning Activities* > *Classes*.
2. Find and open the class that is assigned to the users who you want to communicate to.
3. In *Actions*, click *Send Notification*.

Task overview: Sending Email Messages to Groups of SAP SuccessFactors Learning Users [page 1186]

Related Information

Sending a Notification Email from SAP SuccessFactors Learning to an Individual User [page 1188]
Sending Ad Hoc Communication with All Users Assigned to a Learning Item [page 1189]
Syntax Tags Used in Ad Hoc Notifications [page 1191]

23.4.20.6.4 Syntax Tags Used in Ad Hoc Notifications

View this section if you want to know about syntax tags used in ad hoc notifications.

The table below shows the ad hoc syntax tags and where they can be used.

> **Note**
>
> You can use only "user" syntax tag IDs with an ad hoc notification; that is, you can't use all of the syntax tag IDs associated with the notification template ID that you're using to base the ad hoc notification unless those syntax tag IDs are also part of the user-specific syntax tag IDs. Therefore, you must delete the non-user specific syntax IDs; otherwise, the syntax tag appears as text in the notification. For example, if you include the text "The Job ID is: <JOB_ID/>." when you're creating an ad hoc notification message, the user receives that exact text: "The Job ID is <JOB_ID/>."

Syntax Tag IDs	Where the tag can be used
<STUD_ID/> (User ID)	Any ad hoc notification
<STUD_NAME/> (User Last Name, First Name)	Any ad hoc notification
<STUD_ORG/> (User organization)	Any ad hoc notification
<STUD_DMN/> (User domain)	Any ad hoc notification
<CPNT_ID/> (Item ID)	*Users* > *Tools* > *Send Notifications* > *Requests tab* > for an item
<CPNT_TITLE/> (Item Title)	*Users* > *Tools* > *Send Notifications* > *Requests tab* > for an item
<CPNT_DESC/> (Item Description)	*Users* > *Tools* > *Send Notifications* > *Requests tab* > for an item

Syntax Tag IDs	Where the tag can be used
<SCHD_DESC/> (Schedule Description)	*Users* > *Tools* > *Send Notifications* > *Scheduled offering record* (*Learning Activities* > *Classes* > *Registration tab*)
<SCHD_SEGM/> (Schedule Segments)	*Users* > *Tools* > *Send Notifications* > *Registration tab* for a scheduled offering

In the other ad hoc notifications, you can filter the users to whom you want to send notifications, but you must delete the non-user specific syntax tag IDs.

Parent topic: Sending Email Messages to Groups of SAP SuccessFactors Learning Users [page 1186]

Related Information

Sending a Notification Email from SAP SuccessFactors Learning to an Individual User [page 1188]
Sending Ad Hoc Communication with All Users Assigned to a Learning Item [page 1189]
Sending Ad Hoc Communication with All Users Assigned to a Class [page 1190]

23.4.20.7 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*).

23.4.20.8 Propagating Learning Expiration Automatic Process Default Settings to All Active Learning Items

Propagate the Learning Expiration Automatic Process default settings to push the settings from the automatic process to all active learning items. This removes any exceptions you made in individual learning items.

Context

When you configure notifications for SAP SuccessFactors Learning, you create an automatic reminder for users to tell them when they should act on course assignments. You set the parameters for the reminder globally, in *System Administrator* > *Automatic Processes* > *Learning Expiration Email Notification*. The global defaults are copied at the item level on creation of the item. Even if there's no manual change at the item level, it is a copy of the default values that were first created. The *Propagate settings to all active items* is only going to copy the new defaults for all the active items.

> ⚠ Caution
>
> This resets **all** overrides to the default, global values. To reset individual overrides, go to *Learning Activities* > *Items* and then open the individual learning items.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Learning Expiration Email Notification*.
2. Choose *Propagate settings to all active items*.
3. Choose *Yes* in the warning message page.
4. Make the required changes in the *Schedule Background Job* page, and then click *Finish*.

23.4.20.9 Blocking SAP SuccessFactors Learning Email Messages to Declared Addresses

Block SAP SuccessFactors Learning email messages if a person is receiving unwanted messages.

Context

Blocking all SAP SuccessFactors Learning messages to an address is like an unsubscribe action. For example, you may use this feature if you have employees who don't interact with SAP SuccessFactors Learning.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *Global Application Settings* > *Mail* (tab).
2. In the *Block all emails to* field, enter the email address of the person who is receiving unwanted messages.
3. To add additional addresses, choose *Add another*.
4. To save, choose *Apply Changes*.

23.4.20.10 Email Notification Template Overrides at the Learning Item Level

You can override the default email notifications for a learning item to create email notifications that are specific to the learning item.

In most cases, you want central control of email notifications for learning items, in *System Administration* > *Manage Email* > *Email Notification Templates*. You want to manage a single email notification for things like canceling a course or registration email notifications. In a few cases, however, you might want to create a special email notification for a specific course. In these cases, you can override the central, default template with a custom email notification for the learning item.

> ⚠ Caution
>
> If you attach a file or customize any of the values on the learning item level, in *Learning Activities* > *Items* > *Email Notifications*, then the system **breaks** the link between this email notification and its corresponding central email notification template ID. If you break a link, then the system no longer propagates modifications that you make to the **email notification template ID** to this email notification.

23.4.20.11 Notification Inheritance from Learning Item to Class

This topic describes how the class inherits its notification information from the learning item that it is associated with.

When you create a class, the system automatically copies the content from *Learning Activities* > *Items* > *Notifications* to *Learning Activities* > *Classes* > *Notifications* for this class. When you update any value in the learning item notification, the system automatically updates the class notification. If, however, you change the notification in the class, you stop the inheritance and the class no longer receives modifications that you make to the item. When you make changes to the class notification, you do not affect the learning item notification.

23.4.20.12 Locations Where You can Send Ad Hoc Notifications in SAP SuccessFactors Learning

You can send ad hoc notifications from SAP SuccessFactors Learning in a small set of locations.

Location that Launches Ad Hoc Notifications	Why You Launch from this Location
People > *Users* > *Search Results*	To send an ad hoc notification to the required users.
Learning Activities > *Classes* > *Actions*	To send an ad hoc notification to any users.

Location that Launches Ad Hoc Notifications	Why You Launch from this Location
People > *Organizations* > *Users*	To send an ad hoc notification to users assigned to an organization.
Learning Activities > *Items* > *Actions*	To send an ad hoc notification to users who have requested an item.
Learning Activities > *Competencies* > *Users*	To send an ad hoc notification to users who are assigned to a competency.
Learning Activities > *Items* > *Actions*	To send an ad hoc notification to any users.
People > *Users* > *Actions*	To send an ad hoc notification to any users.
Learning Activities > *Programs*	To send an ad hoc notification to any users.
Learning > *Curricula* > *Actions*	To send an ad hoc notification to any users.

Related Information

The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 1143]

23.4.21 Virtual Learning System Global Application Settings

These are the Virtual Learning System (VLS) global variables in SAP SuccessFactors Learning

Field Label	Description
Display Join option prior to session start	Controls when the join link becomes available in SAP SuccessFactors Learning. **Note** Even though you set the join session link to display early, users can only join the session early if configured in the VLS vendor settings.

Related Information

SAP SuccessFactors Learning Virtual Learning Service (VLS) [page 1197]

Online Learning Content Management Configuration Properties [page 790]

23.4.22 SAP SuccessFactors Learning Virtual Learning Service (VLS)

The Virtual Learning Service (VLS) is the integration between virtual meeting rooms and SAP SuccessFactors Learning.

If your company holds training in online meeting spaces like Microsoft Teams, Zoom, Webex, or Adobe Connect, you can use the Virtual Learning Service (VLS) to connect users directly to the meeting rooms where their training takes place. When the meeting spaces are connected through VLS, users can open a virtual meeting room by clicking a link in their assignments lists.

Depending on the capabilities of the meeting room vendor, SAP SuccessFactors Learning can also read the attendance list, time in attendance, and other reporting data. This saves instructors time later, when they post the outcomes of the training to records management.

> **Note**
>
> Virtual learning events are managed within SAP SuccessFactors Learning. When administrators create or update a meeting in Learning, we send the meeting details to the VLS vendor. We don't retrieve any information for meetings created within the VLS vendor's application.

Related Information

Enabling the Virtual Learning Service

23.4.23 Attachment Limits in LMS_ADMIN

File upload limits set boundaries for files uploaded to SAP SuccessFactors Learning Administration. If users violate the limits, they see an error that the upload limit has been violated. They cannot continue until they address the problem.

> **Note**
>
> In SAP SuccessFactors Learning, attachment limits are spread across three system configuration files: *ATTACHMENT*, *CONTENT IMPORT*, and *LMS_ADMIN*. You can edit all the files by going to: *System Administration* > *Configuration* > *System Configuration*.

Property	Description
`fileUploadMaxSize`	In most cases, `fileUploadMaxSize` applies to images that you upload (for example, thumbnail images). It contains the limit, in bytes, of uploaded files **not** covered by the settings in the *ATTACHMENT* system property file or by `maximumFileSizeKB` and `backgroundThresholdFileSizeKB` in the *CONTENT IMPORT* system property file. The value can be between 0 (no uploads) to 21474836642 (2 GB). We recommend a value greater or equal to 65536 bytes or SAP SuccessFactors Learning might not function properly.
`fileUploadFilenameMaxSize`	The `fileUploadFilenameMaxSize` property contains the limit, in characters, of a file name for files to be uploaded to the server.
`resourceUploadMaxSize` `resourceUploadWarningSize`	The `resourceUploadMaxSize` property contains the maximum size, in bytes, of files that can be uploaded for Plateau Question Editor (PQE). The most commonly uploaded files are images. The `resourceUploadWarningSize` property contains the limit, in bytes, at which PQE users are warned that their image is too big. As long as users do not exceed the bytes in the `resourceUploadMaxSize` property, they can still upload after the warning. **Please use assessments instead of PQE.**

Related Information

Configuring Attachment Logic and Limits in SAP SuccessFactors Learning [page 1041]

23.4.24 SAP SuccessFactors Learning Administration Search Selectors

Search Selectors control the default behavior of searches in SAP SuccessFactors Learning Administration, including searches for records, filters on entity searches and filters on report criteria.

In some uncommon cases, you might need to change how administrators search for records. If you think that you need to change the search selectors, please engage SAP SuccessFactors services to better understand the search framework and the consequences of editing search selectors. Changes to this file should be done by a certified system administrator or DBA.

Because the changes you make might directly affect both the UI and the search criteria, and therefore the response time of your searches, when editing the search selectors, consider the number of records in your database and the capacity of the IT resources used by your organization.

You can see search selectors in *System Administration* > *Configuration* > *Search Selectors*. Each search selector is an XSD for the various search pages used by the SuccessFactors search framework. Find the search selector that applies to the search you want to modify, and then edit it to control both the administration user interface and the SQL properties of the search.

> **Note**
>
> If the customization for key values `mainSqlFrom` and `mainSqlFromHana` are modified for any of the search selectors by the end-user and if these key values are modified out of the box for a specific release as well, then the customization will be backed-up and won't be effective on the search selector. However, administrators can manually re-apply the customization by viewing their back-up from the *View Backed-Up Configuration Changes* option displayed at the end of the respective search selector page.
>
> If you want to clear all backed-up configuration changes, you can do so by selecting *Clear Backup*. Once the configuration changes are cleared, the *View Backed-Up Configuration Changes* option will not be displayed.
>
> Only if the customization needs a back-up before performing an upgrade operation, the above mentioned *View Backed-Up Configuration Changes* and *Clear Backup* options are displayed on the system.

Related Information

Using SAP SuccessFactors Learning Administration Search Selectors with General Display Name [page 1199]

23.4.24.1 Using SAP SuccessFactors Learning Administration Search Selectors with General Display Name

Search Selectors control the default behaviour of searches in SAP SuccessFactors Learning Administration, including searches for records, filters on entity searches and filters on report criteria.

If *General Display Name* is enabled and a search operation is performed, search results display the *Display Name* of the user instead of the fully formatted name. If disabled or if the display name is unavailable for the user, then the fully formatted name of the user is displayed. For administrators and instructors, the display name is based on the corresponding *Related User*.

> **Note**
>
> If a search operation is performed using search selectors, irrespective of *General Display Name* being enabled or disabled, the *Display Name* (Additional Search Criteria) is available.

The following table provides information on search results that are displayed for various personas using search selectors:

Persona Based Search Selectors

Persona	Operation	Action	Search Selector
User	Instructor Search	To search for an instructor.	User Search Instructor (LearnerSearchInstructor)
User	User Search	To search for checklist observers.	Learner Search Checklist Observers (LearnerSearchChecklistObservers)
Administrator	User Search	To search for a learner.	User (Student)
Administrator	User Search	To add learning history for a user.	History Record (LearningEvent)
Administrator	Instructor Search	To list an instructor.	Instructor
Administrator	Administrator Search	To search for an administrator.	Admin (User)
Administrator	Administrator Search	To list learners to be selected for a merge operation.	User Merge (StudentMerge)
Administrator	Manager Search	To search for a manager.	Manager (Supervisor)

23.4.25 SAP SuccessFactors Learning Help Configuration

Do not change the help configuration in LMS_ADMIN.

We have two configuration settings for the help system that are legacy. We recommend that you do **not** change them:

- `baseHelpRedirectURL`
- `helpRedirectorURI`

23.4.26 ENTITY_IMPORT

This topic describes how the ENTITY_IMPORT system properties file affects the entity import tool.

The ENTITY_IMPORT tool controls the rules of *System Administration* > *System Management Tools* > *Import Data*. In most cases, you don't need to change the values in this file. At most, you might change the maximum size per attachment.

Property	Description
`supportedAttachmentTypes[*]`	You can use each supported file type that you can use to import data. Unless you customized the import data tool, we recommend that you don't change the default settings

Property	Description
`maximumSizePerAttachmentKB`	The `maximumSizePerAttachmentKB` property contains the maximum file size, in kilobytes, that you can use to import data. We recommend that you don't change the value unless you've customized the tool. If administrators exceed this limit, then they see an error and are prevented from continuing.
`backgroundJobThreshold`	The `backgroundJobThreshold` property contains the number of rows that can be in an import file (spreadsheet) before the system requires users to schedule a background job. Currently, only a value of -1 is supported (forcing all jobs to run in the background). Don't change the default.

23.4.27 DIRECT_LINK

This topic describes how the DIRECT_LINK system properties file affects your administration environment. If you haven't added new .jsp files or struts actions, you do **not** need to change this file.

DIRECT_LINK maps the settings and administrator sees on the *System Administration* > *Tools* > *Generate Direct Link* page with the functions that provide direct links. You do not need to change this file unless you add new .jsp files or struts actions to the system and you want administrators to build direct links to them.

23.4.28 User-Created Account (Global)

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

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

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

User Settings

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

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

Instructional Text

The message defined in the *User-Created Account Introduction Message* displays at the top of the registration page when people register for their accounts. The same message displays to people registering through the basic access

URL or through a site. You can configure each site to display additional information to people registering through a site. Choose *Edit* to modify the default message and create additional values for other locales.

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

Contact Information

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

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

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

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

Employee Information

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

Finance

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

- Billing Address
- Billing Phone Number

- Shipping Address
- Shipping Phone Number

Preferences

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

Custom Fields

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

23.4.29 USER GENERATED CONTENT

This topic describes how the USER GENERATED CONTENT system properties file control content that can be added as quick guides.

Property	Description
`supportedFileExtensions`	The `supportedFileExtensions` property contains the list of file extensions supported by quick guides. Quick guides are wizards that users can upload to teach each other how to do tasks. They often include images.
`maximumPixelResolution`	The `maximumPixelResolution` property contains the resolution, in pixels of images that can be uploaded to the system with quick guides.

23.4.30 SAP SuccessFactors Learning System Properties in LMS_ADMIN

Within the LMS_ADMIN configuration file, some properties directly affect the SAP SuccessFactors Learning application.

Property	Description
`restrictUserSelfModification`	Administrators who have permissions to edit administrator accounts aren't allowed, by default, to modify their own account. For security reasons, they must request that another administrator make the change. The administrator isn't allowed to self-modify because the `restrictUserSelfModification` property is set to true. In some cases, you might want to allow administrators to edit their own accounts. For example, in a training environment or in a development environment, you might allow it. To allow self-modification, set `restrictUserSelfModification` to **`true`**.
`webServicesEnabled`	This setting is ignored in most customer environments because most customers are integrated with SAP SuccessFactors platform. This setting is ignored in integrated environments. If you **aren't** integrated, then when `webServicesEnabled` is `true`, then web services are enabled to Learning.
`jamIntegrationEnabled`	This property affects customers who use SAP SuccessFactors Learning in an integrated environment. If set to **`true`**, SAP SuccessFactors Learning can use the integrated SAP Jam environment. For example, you can assign SAP Jam groups to learning items so that the participants have an SAP Jam group for their course.
`allowFutureHireDates`	When set to **`true`**, a user's hire date can be in the future. A common reason to set this property to true is if you use User Connector - SF to load users from the SF tables to the SAP SuccessFactors Learning. Users in the SF tables can have future hire dates: they're set up in the system so that they're ready for the employees' first day. The default setting is `false`. If you set this property to true and then you set it back to false, the system **doesn't** remove users with future hire dates or perform any other cleanup: your current user entities are left as-is and new users created after you set it back to false are prevented from having future hire dates.

Property	Description
`enableCappingFactor`	By default, this property is set to `false`. Set it to **`true`** for French government reporting. When this property is set to **`true`**: • The history record recorder displays the system default currency instead of the dropdown. • Administrators are prevented from changing the currency for additional costs in *Edit Learning History*. • The system hides *Training days* while recording learning.
`selfRegistrationUniqueEmailAddressRequired`	We recommend a value of `true` even though the default value is `false` to maintain legacy behavior. When you set this to **`true`**, you force anyone who self-registers through SAP SuccessFactors Learning to have a unique email address. When self-registered users have a unique email address, they can recover lost passwords on their own.
`useOrgEmailAsFromForNotifications`	When set to **`true`**, each organization in SAP SuccessFactors Learning can have its own **from** address for Learning notifications. You configure the address on the organization (*People* > *Organizations*).
`useOldValidationErrorFormat`	When set to **`false`**, the system returns a specific error code if there's one available. If no specific code is available for the error that occurs, the system returns a response code of `500`. When set to **`true`**, the system always returns a response code of `500`. By default, this setting is hidden in the configuration and the value is set to `false`. For more information on this setting, see Specific Error Codes for API Validation [page 1207].
`lockItemContentStructure`	By default this configuration is set to **`true`**, and prevents an administrator from modifying the online content structure of an Online Item once learners have launched it. When this configuration is set to **`false`**, it allows an administrator with the edit online settings permission to change the online content structure of an Online Item even if it is in progress or complete.
`useItemLibraryBackgroundJob`	By default this configuration is set to **`false`**. Set it to **`true`** to use a background job when adding library items.

23.4.31 Specific Error Codes for API Validation

When an administrator sends certain API requests and the request contains a validation error, the system provides a specific validation response code for the error that occurs.

The table below indicates the API requests that return a specific validation response code and error message when `useOldValidationErrorFormat` is set to `false` (*System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*) If no specific code is available for the error that occurs, the system returns a response code of `500`.

> **Note**
>
> By default, `useOldValidationErrorFormat` is hidden in the configuration and the value is set to `false`.

API	Error Message	API Response Code
`/learning/odatav4/public/user/curriculum-service/v1/CurriculumItemDetails`	"The selected curriculum is not designated as a root for the curriculum."	400
`/learning/odatav4/public/user/learningplan-service/v1/UserTodoLearningItems?$filter=criteria/searchPhrase eq 'aa'`	"User is not assigned Access Learning Plan permissions."	403
`/learning/odatav4/public/user/learningplan-service/v1/UserTodoLearningItems?$filter=criteria/searchPhrase eq 'aa'`	"This user doesn't exist: <UserID>."	403
`/learning/odatav4/public/user/catalogSearch/v1/CatalogItems?$filter=criteria/searchPhrase eq 'aa'`	"User does not have the Access Advanced Library Search permission assigned."	403

Related Information

SAP SuccessFactors Learning System Properties in LMS_ADMIN [page 1205]

23.4.32 Logging Properties in LMS_ADMIN

This topic describes how you can control the logging of the application in the LMS_ADMIN system properties file.

Logging in the application is controlled by Log4J, not in the application configuration. You can, however, indirectly affect the logging in the configuration.

Property	Description
`isI18nLabelExceptionLoggingEnabled`	When the `isI18nLabelExceptionLoggingEnabled` property is set to true, if a SuccessFactors Learning requests a label but cannot find it in the locale label cache, the missing label is logged to missinglabels.log. Set to false to turn off logging.
`stackTraceDepthForMissingLabelLogging`	The `stackTraceDepthForMissingLabelLogging` property defines the depth of the stack trace that will be logged to the missing labels log file. If set to 0 (zero), then no stack trace information is logged. It only applies if the `isI18nLabelExceptionLoggingEnabled` property is set to true.

23.4.33 REPORT_SYSTEM System Properties

This topic describes the purpose of the REPORT_SYSTEM system properties file.

The REPORT_SYSTEM file contains basic information about the running of reports. To make bigger configuration changes to your reports, you must work within the Report Framework.

23.4.33.1 Asynchronous Reports

This topic describes how you can control asynchronous report behavior in REPORT_SYSTEM.

With SAP SuccessFactors Learning 6.4 and later, all reports are asynchronous; therefore, any changes you make to these settings affect all reports. When administrators run a report as a background job, the system generates the report at the scheduled time and stores it in the database.

Even though all reports are asynchronous, administrators still click Run Report, which gives the impression that it's a synchronous report. When administrators try to run a report immediately in this way, the system schedules it for immediate background execution, but with the timeout specified by the `onlineTimeoutPeriod` property. If they schedule the report, then the system uses the timeout specified by the `backgroundTimeoutPeriod` property.

Property	Description
`asyncStorageMaxSize`	The `asyncStorageMaxSize` property contains the maximum size (in bytes), after which the system aborts attempts to store the report in the database. The maximum size limit for `asyncStorageMaxSize` is 5 GB. **Note** This report configuration limit doesn't impact any recurring reports as per current analysis. SAP recommends using filters while running reports that produce large data.
`asyncStorageTTLDays`	The `asyncStorageTTLDays` property contains the number of days after which the system removes a report that is stored in the database.
`asyncEmailedReportFileName`	The `asyncEmailedReportFileName` property contains the default file name when the report is sent as an e-mail attachment. The format of the report is appended (.xml, .html, .pdf, or other extensions).
`scheduleOnlyReports.*`	The `scheduleOnlyReports` properties contain reports that can only be run as scheduled reports. The reports still appear in the Reports section, but users cannot execute them concurrently; they must schedule them. If you know that some reports always take a long time to run, you can force users to schedule them. Each report that you want to force as schedule only is a suffix to the `scheduleOnlyReports` property. For example, `scheduleOnlyReports.UserCurriculumStatus` makes the curriculum status report schedule only. The report name is stored in the database, within the PA_REPORT table, in the REPORT_NAME column.
`onlineTimeoutPeriod`	The `onlineTimeoutPeriod` property contains the time limit on all reports run online (by users clicking the report in SAP SuccessFactors Learning). If the report takes longer than the timeout, execution stops, an error is logged if logging is set to DEBUG, and users see an alert that tells them the report has taken too long to generate. Additionally, the next time users try to run a report that has timed out, they see a message telling them that previous attempts at the report did not run due to timeout settings. When a PDF format report times out, the user can see a "poorly formed PDF document" error.

Property	Description
`backgroundTimeoutPeriod`	The `backgroundTimeoutPeriod` property contains the time limit for all background reports. If a report exceeds the timeout, SAP SuccessFactors Learning stops the report and logs a message about the failure. SAP SuccessFactors Learning logs the message if the logging level is set to DEBUG.

23.4.33.2 Content Types

This topic describes the output format content types in REPORT_SYSTEM.

The content types that are streamed to the browser and some information about the stream are identified in the `outputFormatContentTypes.*` properties in REPORT_SYSTEM. Do **not** edit these values without contacting a SAP SuccessFactors Learning representative.

23.4.33.3 Font Format Properties in REPORT_SYSTEM

This topic describes how you can control the font display for different classes of text in reports. You control the font display with properties in the REPORT_SYSTEM system properties file.

Property	Description
`baseFontFile`	The `baseFontFile` property contains location of the base font. Report text is rendered using this font style. Specify a Unicode font for UTF-8 compatibility.
`baseFontEncoding`	The `baseFontEncoding` property specifies the association between a code and a character. This is not typically changed. Example values are: • Identity-H: horizontal • Identity-V: vertical • Cp1250: Central Europe • Cp1252: Western Europe • Cp1257: Baltic

Property	Description
`reportFontVOXMap`.*	The `reportFontVOXMap.*` properties control the formatting of text in PDF reports. The `reportFontVOXMap.*` property contains at least one suffix, name, that matches the middle of the property. For example, `reportFontVOXMap.title.name=title` identifies the attributes of the title font. For example, the `reportFontVOXMap.title.size=16.0` sets the size of the title font to 16.

23.4.33.4 Page Format Properties in REPORT_SYSTEM

This topic describes the properties in REPORT_SYSTEM that control page formatting.

Property	Description
`queryIndentWidthPercentage`	The *queryIndentWidthPercentage* property value is the percentage of the page that the report data is indented.
`queryResumptionIndicatorColor`*Val	The *queryResumptionIndicatorColor*Val* property contains the RGB values of the color of the line that prints after the query prints detail. The * in the property is red, green, or blue.
`tabularRowAlternatingBackgroundColor`*Val	The *tabularRowAlternatingBackgroundColor*Val* property contains the RGB values of the color of alternating rows (the color alternates with the page color). The * in the property is red, green, or blue.
`summaryRowBorderColor`*Val	The *summaryRowBorderColor*Val* properties contains the RGB values for the border of boxes around summary rows. The * in the property is red, green, or blue.

23.4.33.5 Adobe Download Link Properties in REPORT_SYSTEM

When administrators run reports, they can run them as PDF, which includes information about downloading Adobe Acrobat Reader™. This topic describes the properties in REPORT_SYSTEM that control the download information.

Property	Description
`hrefAdobe`	The `hrefAdobe` property contains the URL that administrators open to download Adobe Acrobat Reader.

Property	Description
`imageVO.*`	The `imageVO.*` properties contain the display properties of the Adobe Acrobat logo. The image is hyperlinked to the URL in the `hrefAdobe` property. The image source is relative to the Foundation WAR file.

23.4.33.6 Administrator Report Preference Properties in REPORT_SYSTEM

This topic describes the properties in REPORT_SYSTEM that control the search and browse functionality of administrators' report search system.

Property	Description
`reportLazyPersistence`	The `reportLazyPersistence` property controls whether Administrators' search preferences are "sticky" in SAP SuccessFactors Learning Administration. If sticky, the application remembers what the administrators last searched on and persists it into the database. The next time the administrators open the Reports pages, their search settings are defaulted to their last search. Set to false to make the search preferences sticky.
`reportPerferencesHandler`	The `reportPerferencesHandler` property contains the class that handles "sticky" report preferences. Don't change unless you've written a new class to handle preferences. Check with a SuccessFactors representative for more information.

23.4.33.7 Online Report Designer Properties

SAP SuccessFactors Learning integrates with SAP SuccessFactors Online Report Designer according to the following properties.

Learning to ORD Properties

This property...	...Is used as follows
`adhocReportDefaultPeriod`	The amount of time, in months, that a report will look back in the past for records. If your reports are timing out often, you can decrease the amount of time.

This property...	...Is used as follows
`adhocReportPreviewModeDefaultPeriod`	The amount of time, in months, that a report will look back in the past for records while the user is designing a report. If your report designers complain that their design sessions are timing out, consider decreasing the amount of time.

23.4.33.8 Keeping Old Report Definitions in SAP SuccessFactors Learning

You can avoid getting the latest report definition in SAP SuccessFactors Learning fi you need time to adjust to the new definition.

Context

When `useLatestReportDefinition` is `true`, report jobs get the latest report definition. If you started a recurring report job many releases ago, you get all improvements and fixes we made to the report between the time that you scheduled it and the current release. The default value is `true` because we recommend that you get the latest definitions without rescheduling your report jobs every release.

When `useLatestReportDefinition` is `false`, report jobs keep old definitions. If you started a recurring report job many releases ago, and we updated the report definition with improvements and fixes, you don't see those changes: you see the report as it was on the release that you scheduled it. For example, in Q4 2016, we introduced Person ID External to the delimited report definitions. If you scheduled a report in 1608 or earlier, and if `useLatestReportDefinition` is `false`, then you still get Student ID.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Open *REPORT_SYSTEM*.
3. Find `useLatestReportDefinition` and set it to **`false`**.

23.4.34 SEARCH System Properties

This topic describes the purpose of the SEARCH system properties file.

SEARCH contains global settings for the search framework. The search framework is the system that Administrators use to search for objects in the system (users, learning items, classes, etc). Each field that the

administrator can use to search is called a selector. Individual selectors can be configured in SAP SuccessFactors Learning Administration in the module *System Administration* > *Configuration* > *Search Selectors*.

Property	Description
`resultMaxRowAllowed`	The `resultMaxRowAllowed` property is for internal debugging use. Do not use.
`resultRowsPerPage`	The `resultRowsPerPage` property contains the default number of rows per page of the search results.

`rowsPerPageOptions[*]`
`studentShowAllOption`
`studentShowAllLabel`
	The `rowsPerPageOptions[*]`, `studentShowAllOption`, and `studentShowAllLabel` properties include settings for the end user interface search. Users can select how many rows appear on each page. In the `rowsPerPageOptions[*]`properties, each bracketed value is a number that the user can choose from a list. That number of rows appears in the page.
	The `studentShowAllOption` property can be set to true or false (set to true to show and false to hide). We recommend that you set to false for performance reasons. Allowing users to return all records can lead to long transaction times and bog down your system. If you want users to be able to return many records, but not all records, you can set `rowsPerPageOptions[*]` to a high value, such as 500.
	The `studentShowAllLabel` property contains the label that appears next to the rows per page list.

`adminRowsPerPageOptions[*]`, `adminShowAllOption, and adminShowAllLabel`	The `adminRowsPerPageOptions[*]`, `adminShowAllOption`, and `adminShowAllLabel` properties include settings for the administrator interface search. Administrators can select how many rows appear on each page. In the `adminRowsPerPageOptions[*]` properties, each bracketed value is a number that the administrators can choose from a list. That number of rows appears in the page. The `adminShowAllOption` property can be set to true or false (set to true to show and false to hide). We recommend that you set to false for performance reasons. Allowing administrators to return all records can lead to long transaction times and bog down your system. If you want users to be able to return many records, but not all records, you can set `adminRowsPerPageOptions[*]` to a high value, such as 500. The `adminShowAllLabel` property contains the label that appears next to the rows per page list

Property	Description
`globalSearchContextProperties[*]`	The `globalSearchContextProperties[*]` properties can contain either `EntitySearchDefaultToResultPage` or `PickerSearchDefaultToResultpage` in brackets. Entity Search appears when an administrator clicks a menu (like User Management > Users) appears when an administrator clicks the Picker button. If you set either entity search or picker search property to true, then, by default, all searches of that type open a results page when the administrator first opens the page.
`showSQL`	When the `showSQL` property is set to true, the system outputs search SQL statement for debugging purposes. By default, set to false.
`catalogSearchResultsDisplayPriceType`	The `catalogSearchResultsDisplayPriceType` property contains the ways that catalog prices can be displayed. Possible values are listed in the comments.
`catalogSearchResultsOrderBy` `catalogSearchResultsOrderByColumns`	The `catalogSearchResultsOrderBy` property, when set to true, allows the catalog search results to be ordered. You then set the order by columns in the `catalogSearchResultsOrderByColumns` property. Possible values for the `catalogSearchResultsOrderByColumns` property are listed in the comments.
`maxInListItems`	The `maxInListItems` property contains the maximum number of list items in a search SQL statement. Cannot exceed 1000.
`useGlobalCaseSensitivitySetting` `globalCaseSensitive`	If you set the `useGlobalCaseSensitivity` property is set to true, then the system ignores the case sensitivity settings on search selectors. Set to false to control case sensitivity on the search selector level. The `globalCaseSensitive` property is active if the `useGlobalCaseSensitivity` is set to true. Set `globalCaseSensitivity` to true to make the search case sensitive by default. Set to false to make it not case sensitive by default.

Property	Description

`matchOptionDefaults[*]`	The matchOptionDefaults[*] property controls the default search criteria options. The brackets can contain these values:
	OP_EXACTMATCH = “=”;
	OP_EQUAL = “=”;
	OP_STARTWITH = “like1”;//cannot be the same as OP_CONTAINS
	OP_CONTAINS = “like2”;
	OP_ANYMATCH = “in”;
	OP_ANYMATCH_NOT = “not in”;
	OP_GREATER = “>”;
	OP_LESS = “<”;
	OP_GREATER_EQUAL = “>=”;
	OP_LESS_EQUAL = “<=”;
	OP_NULL = “is null”;
	OP_NOTNULL = “is not null”;

`maxResultsAllowedForAdminPowerSearch` `powerSearchWhitespaceCharacters`	The `maxResultsAllowedForAdminPowerSearch` property controls the amount of records that the power search can return. The `powerSearchWhitespaceCharacters` property sets the characters that the power search treats as white space. The power search is part of the administration environment. It searches multiple object types at one time.
`restrictUserPeerSearchByOrg`	Set to true to restrict users' search to users within their own organization structure. Set to false to allow users to search any active user.
`orgLevelsAboveUser`	This property sets the number of organization levels above the user's organization the user can search when `restrictUserPeerSearchbyOrg` is enabled. Min Value: 0 Max Value: 30 Default value: 0 When set to zero (0), the search results returns only users associated to the user's organization or its sub-organizations When set to greater than zero (0), the search results returns users associated to user's parent organization <x levels above user's org and its sub-organizations

Property	Description
`additionalIdentifierDisplayedInUserSearch`	Set to the additional information that you want users to see when they search. For example, when users search for other users to recommend a course, they see the users' names and either their suite-wide ID, their organization, or their email address. Most customers select email address because it is the easiest way to differentiate users. If left blank (null), then users do not see any additional information. This can make it hard to distinguish between users with common names, but customers with conservative privacy policies might choose to leave the value blank (null).

`enableStemSearchInPowerSearch`
`enableTrimmingOfLeadingAndTrailingSpaces`
`enableSingleCharacterWildCard`
`enableMultipleCharacterWildCard`
	These settings control power search. We recommend the default settings for the best experience in power search. See the comments for each setting to understand what they control.

23.4.35 REPORT System Properties

This topic describes the REPORT system properties file.

REPORT is used in the report framework. It controls the classes that are called for different reports, their input parameters and the returns. To edit REPORT, you must understand the Report Framework in general and have a clear understanding of report writing and Java.

23.5 Learning System Operation

During the normal operation of Learning, system administrators often need to troubleshoot the system, manage users and data in the system, and so on.

In Learning, most of the system operation is troubleshooting, managing processes, and managing system data.

23.5.1 Downloading an Installation Qualification Report

As a validated Learning customer, you download your IQ (Installation Qualification) Report from SAP SuccessFactors Learning Administration to demonstrate to regulators that the installation equipment and processes meet all specifications, that the software is installed correctly, and that all required components and documentation are installed.

Context

If you're a properly permitted administrator, you can retrieve the environment IQ report as soon as it becomes available to the application location after any installation, upgrade, or patch application.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *System Management Tools* > *Environment*.
2. Choose *Download* `<your version>` *IQ Report*.

23.5.2 Troubleshooting Connectors

Troubleshoot connectors if you see problems in SAP SuccessFactors Learning data and you suspect a connector problem or if you received an e-mail about a connector problem.

Prerequisites

- Enable the connector archive to save for 3 months
- Enable the connector logs

Procedure

1. Go to Learning Administration, go to *System Administration* > *Connectors*, and then select the connector that you want to troubleshoot.

   > → Tip
   >
   > User Connector - SF is the most common connector for trouble because you run it so frequently. For validated customers, it's either User Connector - SF or *Item Connector*. If you see problems with course and you integrate with Skillsoft, check *Skillsoft Connector*.

2. Choose *Test FTP Connection* to verify that SAP SuccessFactors Learning can reach and use the SFTP site.

   The test checks:
   - The URI of the SFTP server or for general errors in connection
   - The username and password configured for the connector
   - The permissions and folder configuration for read access
   - The permissions and folder configuration for write access

To resolve trouble, go to *System Administration* > *Configuration* > *System Configuration* > *CONNECTORS* and check the SFTP settings. Also check that your username and password and the permissions on the SFTP site folders.

3. Choose *View Errors* to see the errors in the connector and troubleshoot them individually.
4. Choose *View Results* to see the results of the connector run, including successful jobs.
    - To view the configuration changes for a connector run, choose *View Results* > *View Logs*. Find the text Current Configuration changes.
    - To see the columns that the connector processed, choose *View Results* > *View Logs*. Find the text Reading following fields from Input file.
    - To view detailed information for the delta changes that happened during the connector run, choose *View Results* > *View Logs*. Find the text Update Statistics.
    - To access connector report while Connector run is in progress, choose *View Results* > *Current Connector Run* > *Run Detail Report*.

23.5.2.1 Purging Archived Connector Input Files

Enable the SAP SuccessFactors Learning connector archive so that you have a record of connector files for troubleshooting connector issues.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Connectors* > *Connector Settings*.
2. Choose *Enable input file archive*.
3. Choose *Apply Changes*.

Results

Input files archived during each connector run are retained for up to 30 days by default. After this period, the files are automatically purged. We recommend downloading the `zip` file containing archived input files before they're purged to retain a copy for troubleshooting connector issues. To access the input files, go to *System Administration* > *Connectors*, select the connector, and then choose *Show archived input files*.

> **Note**
>
> The *Enable input file archive* option isn't supported for the *User Connector - Federal* connector. As a result, the *Show archived input files* button doesn't appear in *System Administration* > *Connectors* > *User Connector - Federal*.

23.5.2.2 Enabling Connector Logging

Enable connector logging during initial implementation so that your team can be alerted to trouble with connectors and easily see a log of the connector.

Prerequisites

Enable Learning email notifications. You usually enable Learning email notifications as part of your overall implementation because they apply to more than just connector logs. Think broadly about Learning email notifications when you enable them.

Set up an email distribution list of the people who are to be notified of connector trouble.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *CONNECTORS*.
3. Set `connector.ftp.output.report.enable` to `true` to enable the reports to go to your FTP site.
4. Set `connector.ftp.output.report.remoteDirectory` to `/logs` so that logs are written to a folder called logs in the FTP site.
5. Decide how SAP SuccessFactors sends status of the connector.

Property	Value
`connector.report.email.enable`	Set to `true` to receive an email copy of the report.
`connector.report.email.toAddresses`	The email distribution list address that receives the emailed report log if the emailed report is enabled. Don't use a person's email address.
`connector.report.email.CCAddresses`	If you also want to copy an address, add the address here.
`connector.report.email.mailSubject`	The value of this property is the subject line of the report email. We recommend a value like `$interfaceId$ - Connector Results`. At run time, the system substitutes the name of connector for `$interfaceId$`.
`connector.report.email.enableDetailReportAttachments`	If set to `true`, then a detailed log is sent as an attachment to the email. Otherwise, the email contains the time of the run and success or failure. A good strategy to reduce the size of the email messages: set this property to `false` and then tell the recipients to look at the detailed report in the *System Administration* > *Connectors* section of the

Property	Value
	Administrator interface. To use this strategy, recipients must have access to the SAP SuccessFactors Learning Administration environment.

6. Decide how SAP SuccessFactors handles the detailed report.

Property	Description
`connector.report.detail.displayMessageTypes`	This property specifies the level of log entries that must be part of the detailed report. Possible values are: Exception, Warning, FATAL, and info. To include more than one, add as a comma-separated list. For example: `<property>=Exception,Warning,FATAL`
`connector.report.detail.numberOfExceptionsDisplayed`	Change the default value of `5000` only if you need to. For example: if you're troubleshooting during implementation.

7. Save and close *CONNECTORS*.

23.5.2.3 Configuring the Connector FTP Site

Configure the SAP SuccessFactors Learning FTP site so that when the connector job runs, it knows where to get the data files to import and where to write detailed logs.

Prerequisites

You run User Connector - SF, which contains user data. To encrypt this data, you need PGP encryption.

The keyring must be provided to the party that is generating the PGP encrypted file so that the encryption and decryption match. The keyring value is a base64 encoding of the binary keyring file. Use the Linux base64 command or other tool for decoding the property value to obtain the public keyring file that needs to be provided to both ends of the transaction.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *CONNECTORS*.
3. Set `connector.input.file.location` to `FTP`.
4. Set the location of the FTP site and directory where the connectors fetch their data files.

Property	Description
`connector.ftp.protocol`	The protocol used by the FTP server. Valid values are `ftp`and `sftp`.
`connector.ftp.server`	The name of the FTP server. For example, `ftp.acme.internal`.
`connector.ftp.port`	The port that the FTP server listens to. For example, `22`.
`connector.ftp.userID`	The user ID on the FTP server that owns this process. When specifying the user, make sure that the user has access to the directories where the system reads data files and writes log files.
`connector.ftp.password`	The password for the user. The password is clear text until you save the *CONNECTOR* file. On save, the system encrypts the value.
`connector.ftp.input.remoteDirectory`	This is the folder where SAP SuccessFactors looks for data files. If for example, you plan to drop data files in `/root/connectors/input`, add the folder path as follows. **Sample Code** `<...>.remoteDirectory=/root/connectors/input`

5. Set `connector.input.file.name.tenant.suffix.enable` to `false`.

   When `false`, the connector **doesn't** expect a suffix. If you set it to `true`, the connector expects a data file that ends in your tenant ID.

6. Add encryption settings.

Property	Description
`connector.pgp.enabled`	If you encrypt the data file, set to `true` so that the system can decrypt the files. If this setting is set to `true`, it impacts all connectors. If the connector doesn't find a .pgp file, it will still process other file types such as .csv, .txt., and .zip. Encrypted files are common when they contain sensitive information, like user identification numbers.

`connector.pgp.public.keyring`
`connector.pgp.secret.keyring`
`connector.pgp.passphrase`
`connector.pgp.file.extension`
	The `connector.pgp.public.keyring` property value is the public keyring used by the system to decrypt the encrypted files.
	The secret keyring, passphrase, and extension are standard PGP encryption properties. The extension is usually `.pgp`.

7. Set `connector.input.file.fetch.retry.enable` to cause the connector to wait until the next run to retry or to retry again before the next run.

   - Set to `false` if you want to wait until the next connector run if there's a file read error. Set to `true` to try to fetch two more times on file read error. In practice, many organizations set to `false` because they run a connector every day and they believe that the information can wait until the next connector run in the

unlikely event of a file read error. Additionally, file read errors are often caused by issues like missing files or a bad FTP password: issues that won't be solved by trying the fetch again.

- Set to `true` if you believe that the connector information has more time sensitivity than the next connector run. For performance reasons, we control the amount of time that the connector waits before attempting another fetch.

23.5.2.4 Configuring Connector Data File Syntax

Configure connector data file syntax in a rare case when you can't use the default settings.

Context

> **Note**
>
> User Connector - SF ignores these settings.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Configuration* > *System Configuration*.
2. Edit *CONNECTORS*.
3. Change the syntax settings.

Property	Description
`connector.input.file.processing.mode`	Set to `header`.
`connector.input.file.columnDelimiter`	By default, this is set to pipe (`|`). It applies to all connector input files, so we recommend that you use the default and adjust the connector input files to use the same delimiter. You can, for example, set it to a comma (`,`) so the connectors accept Comma-Separated Value (CSV) files.
`connector.input.file.escapeChar`	The character that escapes the delimiter. By default it's a double-quote (`"`). For example, if you want to import an item title that is **Safety, Our top Priority**, then without the escape character, the system reads the comma after **Safety** as the delimiter. You can escape the comma as `Safety"," Our Top Priority`.
`connector.input.file.eolSymbols`	The set of characters that represent an end of a line in the file (a new line). By default, it's an exclamation point, two pound signs, and another exclamation point (`!##!`).

4. Save *CONNECTORS* by choosing *Apply Changes*.

23.5.2.5 Connector Prefixes in SAP SuccessFactors Learning Configuration

In SAP SuccessFactors Learning configuration, the connector prefix defines which connector the configuration applies to.

Finding the right configuration prefix can be hard because the prefix in *System Administration* > *Configuration* > *System Configuration* > *CONNECTORS* uses abbreviations. This table decodes the prefixes.

Common Connectors and Prefixes

These connectors are very commonly used in most SAP SuccessFactors Learning implementations.

This Connector	Uses This Prefix in CONNECTORS system properties	Notes
Competency Connector - SF	`competency.sf.*` `competency.sfcompetency.*`	Unlike other connectors, the file type of the Competency Connector - SF is *.zip. You can change the file name in the CONNECTORS system properties file in the competency.connector.input.file.name5 property.
Item Connector	`item.*`	Most customers us *Item Connector* during initial implementation only.
Learning History Connector	`learninghistory.*`	Run *Learning History Connector* one time during initial implementation.
Skillsoft Connector	`skillsoft.*`	This connector is common for customers who have a Skillsoft integration.
User Connector - SF	`sfuser.*`	This connector is **required**.

Uncommon Connectors and Prefixes

These connectors are sometimes used in SAP SuccessFactors Learning implementations. They can be used to load data in bulk from another system.

This Connector	Uses This Prefix in CONNECTORS system properties	Notes
Admin Connector	`admin.*`	
Domain Connector	`domain.*`	
Organization Connector	`organization.*`	

Connectors and Prefixes to Ignore

These connectors are so rarely used or they fit such a specific case that most customers can ignore them.

> **Note**
>
> Connector prefixes continue to use previous terminology. For example, while the term *Scheduled Offering* changed to *Class*, the connector prefix remains `scheduleoffering.*`.

This Connector	Uses This Prefix in CONNECTORS system properties	Notes
Alternate Job Code Connector	`alternatejobposition.*`	
Curriculum Connector	`curriculum.*`	
Job Code Connector	`jobposition.*`	
Organization Owner Connector	`organizationowner.*`	
Position Connector	`position.*`	
Registration Connector	`enrollment.*`	
Class Connector	`scheduleoffering.*`	
User Connector	`user.*`	New customers should be using *User Connector - SF* only.
User Connector - Federal	`federaluser.*`	New customers should be using *User Connector - SF* only.
User Connector - SF	`sfuser.*`	New customers should be using *User Connector - SF* only.
User Compensation Connector	`usercompensation.*`	New customer should not see this configuration. Older customers might: it applies to legacy Plateau Compensation. Please ignore it.
User Compensation History Connector	`usercomphistory.*`	New customer should not see this configuration. Older customers might: it applies to legacy Plateau Compensation. Please ignore it.

23.5.2.6 Connector Log Clean-Up

This is how SAP SuccessFactors Learning cleans up connector logs and how you can retain your own copy for longer.

The connector log clean-up is an automatic process that removes connector logs that are older than 30 days or older than 5 job runs, whichever policy retains the logs longer. Connector logs are viewable by administrators with *View Errors* and *View Results* in *System Administration* > *Connectors* > *[individual connector]*.

The logs are also available by email and FTP site, so if you need to store connectors beyond the limits set in the connector log clean-up job, we recommend that keep the FTP logs or emailed error detail report. To enable the FTP logs and email report, go to *System Administration* > *Configuration* > *System Configuration* and check these settings:

- connector.ftp.output.report.enable should be set to true to send the report to the configured FTP site
- connector.report.email.enable should be set to true to send the report to the configured email accounts

The settings associated with the FTP report and emailed report are grouped with the enable settings. We recommend that you check the associated settings and update them if your policy or process has changed.

23.5.2.7 How to Use SAP SuccessFactors Learning Connectors

Use SAP SuccessFactors Learning connectors for an initial load of courses and learning history when you first implement Learning, to import Skillsoft course details on an ongoing basis, and to update user data on an ongoing basis.

> ⚠ Caution
>
> Although you can use connectors to import many different kinds of data at different times, we describe the safest approach here. With all connectors, we recommend that you engage a certified SAP SuccessFactors Learning implementation partner to properly configure your connectors.

Initial Load of Courses and Learning History into SAP SuccessFactors

When you first implement SAP SuccessFactors Learning, you usually have a large amount of course and learning history data to bring into SAP SuccessFactors from the system you were using previously. Use connectors to load this data because of the size of the import. To import course data and users' learning history, use *Item Connector* and *Learning History Connector*.

When you run the initial load of courses into SAP SuccessFactors, you usually load active courses in one job and inactive courses in another job. You load inactive courses so that the learning history has a record of the course that users completed, but because you don't need to work with the course now, you can simplify your initial connector run and use only a few fields.

Ongoing Import of Content from Validated Course Vendor

Validated customers, those who use **vSaaS**, usually chose a vendor that keeps training current with a regulator. For example, in the United States, life sciences companies are regulated by the Food and Drug Administration (FDA). A life science company engages a vendor who keeps track of changing FDA training regulations and creates a repository of training that the customer can use. Validated customers, therefore, run *Item Connector* on an ongoing basis to get the latest changes from the course vendor.

Ongoing Skillsoft Course Data

Skillsoft is a popular third part integration to Learning. Customers who use it can use the Skillsoft connector to keep Learning in sync with Skillsoft.

If you use Skillsoft, you set up *Skillsoft Connector* to import Skillsoft courses on an ongoing basis. Not all customers use Skillsoft, so not all customers configure *Skillsoft Connector*.

Ongoing User Update into Learning

Your user data is stored in Platform, and you import it to Learning so that you can use it to assign courses to users. User data changes regularly as employees change positions, retire, move to other departments, and so on. Because the data changes regularly (and because the mapping rules can be complex), use *User Connector - SF* to import user data to Learning.

The *Registration Connector* may be used to transfer class enrollment information and keep track of ongoing enrollment data from other systems.

User attributes are critical for assignment profiles, for reporting, for security, and for data protection and privacy. The user connector usually imports data from SAP SuccessFactors Platform, but it can also import from other Human Resources Information Systems (HRIS).

Ongoing Import of Competencies

If you use a competency library in Platform and you want to give users competency credit for completing courses, you set up *Competency Connector* to run ongoing imports of competency data from Platform. Not all customers use competencies in learning, so not all customers configure *Competency Connector*.

Other Uses of Connectors

During implementation, a few customers run *Admin Connector*, *Org Connector*, and *Domain Connector*. Most customers can create administrators, organizations, and domains directly in Learning Administration, but for customers who have a large number of administrators, organizations, or domains, their certified implementation consultant might use these connectors.

> → Tip
>
> Although it takes longer, you have less trouble with administrators, organizations, and domains if you create them directly in Learning Administration.

23.5.2.7.1 Scheduling Learning Connector Jobs

Schedule learning connector jobs daily so that the connector knows when to import data.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Connectors*.
2. Find the connector that you want to schedule and select it.

   If you want to schedule User Connector - SF, for example, select *User Connector - SF*.
3. Choose *Schedule This Process*.
4. Schedule the process to run daily at the least disruptive time to for your business.

   > **Note**
   >
   > If you schedule multiple connectors to run on an hourly basis, then you can't define the sequence of executing these jobs.

23.5.2.7.2 Engage Certified Partner to Import Data to SAP SuccessFactors Learning

Learning connectors can import thousands of entities in the system, so we highly recommend that you engage with our Professional Services organization or a certified Learning implementation partner before you attempt to use connectors or any data import, especially in a production environment.

You can attempt to implement connectors on your own, but in doing so, you assume full responsibility for your actions. While we provide safeguards when able, it's possible to load thousands of erroneous data in the system and end up incurring significant costs to correct them. Operational interruptions can be caused by having incorrect completion data; causing severe impact in regulated trades and industries. As with any other opt-in feature, we highly recommend that you do thorough testing before turning on connectors.

23.5.2.7.3 Reasons that You Import Data to SAP SuccessFactors Learning

Data in Learning exists to help you do three things: find courses, assign courses, and report on courses.

When you think about data and importing data, keep the three purposes in mind:

- Data helps administrators find courses, so good course titles and descriptions, for example, are very helpful for learners. For administrators, custom fields in courses can help them find courses that fit a unique categorization for your company. Consider whether the data helps users and administrators find courses before you import it.

- Data helps assignment profiles assign courses to users. Import user attributes that you want to use to assign courses. For example, if you want to assign courses to all users in a state or province, import their state/province to Learning so that the assignment profile can pool all users in a state/province, and assign them a course.
- Data helps administrators run reports inside Learning. For example, when you run a report on users, you might want to see the report for all users in a country. Import country so that you can filter by it.

In most cases, you can start with the default mappings and data when you import data and then **add** additional custom data that you need for your business.

23.5.2.7.4 Common Strategies for Importing User Data to SAP SuccessFactors Learning

During initial implementation, you configure *User Connector - SF* to import data from Platform to Learning. When you do, you use some strategies to help you import the data according to your business processes and needs.

> ⚠ Restriction
>
> New implementations don't use the legacy user connectors (*User Connector* or *User Connector - Federal*). Existing implementations should migrate to *User Connector - SF*.

When you import data with *User Connector - SF*, consider the following:

- During import, you can choose which fields from Platform connect to the fields in Learning. For example, the Learning *Organization* can come from either the division or the department data object in Platform. To consider mapping, think about how you want to assign learning. When you assign by **organization** in Learning, should that be the users' division or department?
- You often want to assign courses or report on employee training based on custom fields. We capture common fields like organization, employee type, address (location) information, and others that customers commonly want to use for assignment. Each business is unique, however, and you might have custom data that you want to use for assignment. For example, a restaurant group might want to assign courses based on whether the employees handle food or not. The restaurant group, in this case, should create a custom data object in Platform to store that information and import it with *User Connector - SF* so that they can use it.
- Some fields are less important than others, and you can decide that you don't want to import a field from Platform. When you make this decision, consider whether you want it for learning assignments or reporting within Learning. The gender field is a good example: most customers don't want to assign courses based on the gender of their employees and gender is available to report on in Report Center, so you don't need to import it to Learning for reporting (you might want, for example, to make sure that courses are being assigned equitably, for example).

23.5.2.7.5 Validated and Non-Validated Customers and Learning Item Connector

Validated customers and non-validated customers follow different strategies when loading data into Learning with *Item Connector*.

Validated customers typically use the **vSaaS** offering. They must certify to a governing body that they have trained their employees on a set of subjects. Their courses usually come from a central repository that they purchase from a third party vendor and that the vendor constantly updates to stay in compliance with the governing body.

Most customers are **not** validated customers, however, so they do not need constant updates of courses from an outside repository. Skillsoft is a notable exception for non-validated customers. Many non-validated customers do import courses from Skillsoft.

You run *Item Connector* differently when you are a validated or a non-validated customer because you import item data differently.

- Validated customers run *Item Connector* daily to get the latest data from the third party vendor.
- Non-validated customers run *Item Connector* one time during implementation to load inactive courses (for history) and active courses for assignment. They then create all new courses directly in Learning. Non-validated customers who use Skillsoft do run *Skillsoft Connector* daily.

23.5.2.7.6 How to Use Learning History Connector

Run *Learning History Connector* one time during initial implementation and then do not run it again.

Learning History Connector draws your employees' completions into Learning so that they get credit for courses that they completed before you implemented SAP SuccessFactors Learning. After initial implementation, however, allow Learning to manage the completions.

23.5.2.8 Data Import to SAP SuccessFactors Learning

You can import data to SAP SuccessFactors Learning through connectors or through a data import tool that uses Microsoft Excel files. Use connectors to import courses, learning history, and users. Use data import tools and Microsoft Excel files for everything else.

SAP SuccessFactors Learning offers two ways to import data: by connector or by user import tool. Run connectors for large jobs or ongoing jobs and use data import for small, one-time jobs.

Use Connectors During Implementation and to Run Ongoing Imports

Connectors are powerful importers that you can schedule to run periodically. You provide a delimited file to SAP SuccessFactors Learning and it imports the file on a schedule. Use connectors when you import a large amount of data and when you need to schedule the import to run frequently.

> **Note**
>
> Always use *User Connector - SF* to import user data.

> **Note**
>
> When importing entities to SAP SuccessFactors Learning through connectors, your .zip connector files go through a virus scan before they're processed. If a virus is detected in the .zip connector file, the file is rejected and deleted.

Use Import Data Tool for One Time Imports

The data import tool is easier to use than connectors. You can download a Microsoft Excel spreadsheet template, complete it, and then upload the completed spreadsheet to add the data. You cannot, however, map fields, set the tool to run on a schedule, or save past uploads for troubleshooting.

Most of the time, any data that you import you can also create directly in Learning Administration with less risk of mistakes. For example, although you can import learning assignments, consider setting up an assignment profile to create the assignments so that they are created correctly according to the business rules in Learning.

> **→ Remember**
>
> When you add or update learning history records for classes using *Learning History* as the entity type, the class end date is automatically set as the completion date, regardless of the *Completion Date* provided in the import file.

23.5.2.9 CONNECTORS System Properties

This topic describes how the CONNECTORS system properties file affects your connectors. If you don't use connectors, this file doesn't apply to you.

Connectors process flat data files that match a predefined format. You can, for example, use the User Connector to import a delimited file of user records. Any system that can export a delimited file can feed data to a connector as long as the source can match the file rules that you create in the CONNECTORS system property file.

We don't recommend that customers deploy connectors on their own. Instead, we recommend that you work with a certified SAP SuccessFactors Learning to understand your business case and then build and test a solution for your business case.

When setting up the CONNECTORS property file, please check the comments in the file for help with specific settings. However, the file matches a pattern. You need to define:

- The syntax of the connectors. For example, what character should delimit the fields? What should define the end of a line? What character escapes the special characters?
- The map between the header row of the file and the target column in the database? For example, the target database column might be STUD_ID for "student ID" but in the header, you might output as "USR_ID."

- The default values for fields that are passed null. For example, all users must have a domain. In the Administration environment, the default domain is usually PUBLIC. In the connector, you might want to assign the same default domain.
- The pick-up location for the input files and the drop location for output files. Usually, this is an FTP site, so the system needs to know the login information for the FTP site and the folder where it should expect the files.

23.5.2.10 Connector Data Mapping Example

When you map connector data between source and destination, follow this example.

Data mapping is common in User Connector - SF because the data in SAP SuccessFactors Platform is generic. When you import it to SAP SuccessFactors Learning, you map it to the field that you want to use for **learning**. To understand the mapping, consider the Platform data objects DIVISION and DEPARTMENT.

Division and department mean something generic Platform: simply the name of division or the department that the employee belongs to. Learning, however, uses **organizations** to assign courses to users and the organization ID is the most durable way to identify organizations. Division and department are **names**, however, and names can change often.

To keep organization assignments through name changes, you typically create a custom data object in Platform for the organization **ID** and map it to the Learning organization ID. You go to *System Administration* > *Configuration* > *System Configuration* and then find the place in learning that the data should map **to**. In this case, it is the organization ID, or `ORG_ID` on the Learning side. You map it to the header name from the Platform export. In this case, the custom data comes in the Live Profile export and the header name with the information is `CUSTOM_ORG_ID`.

Sample Code

```
sfuser.field.mapping.data.ORG_ID=CUSTOM_ORG_ID
```

For example, here is a code snippet of the `CUSTOM_ORG_ID` column header in the Live Profile job.

Sample Code

```
...,CUSTOM_SALES_REGION,CUSTOM_ORG_ID,CUSTOM_WORKS_COUNCIL,...
```

`CUSTOM_ORG_ID` is a custom column header among other custom data. In the example, the feed contains other custom data like the employees' sales region and whether the employee has a works council.

23.5.2.11 Creating Default Values in CONNECTORS System Properties

This topic describes how you set up default values for connectors in *System Administration* > *Configuration* > *System Configuration* > *CONNECTORS*.

When you run a connector, you can set up a default value for fields. For example, domainID is a required to have a value for all connectors that include it, so most implementations specify a default for the domain. That way, if

a connector run is missing a domain value, the row is still added, and it's added with a default domain. You can change the value later.

Here is an example of a default value for domainID for the organization connector:

```
organization.connector.defaultValue.domainID=APAC
```

If a row in the organization connector file is missing a domainID, the row will still be added, but it will be added as APAC.

The syntax for the default value properties is:

```
<connector name>.connector.defaultValue.<field to default>=<default value>
```

Related Information

CONNECTORS System Properties [page 1231]
Connector Data Mapping Example [page 1232]
Connector File Locations and Encryption Settings [page 1233]

23.5.2.12 Connector File Locations and Encryption Settings

When you implement connectors to import data to SAP SuccessFactors Learning, you set the locations where the connector can find its input file and you set the encryption.

Set the file locations and encryption setting in *CONNECTORS*. Go to *System Administration* > *Configuration* > *System Configuration* to edit it.

Connector Data File Properties

Data files are the delimited files that contain the data for the connector. Except for the tenant suffix (described in the table below), the names of the files are fixed and described in each connector definition. For example, the organization connector data file is organization_data_<tenant suffix>.txt. Check the connector definition documentation for the exact name for your connector.

Property	Description
`connector.input.file.location`	Always set to **FTP**.

Property	Description
`connector.input.file.fetch.retry.enable`	Set to `false` if you want to wait until the next connector run in the case of a file read error. Set to `true` to try and fetch two more times on file read error. In practice, many organizations set to `false` because they run a connector every day and they believe that the information can wait until the next connector run in the unlikely event of a file read error. Additionally, file read errors are often caused by issues like missing files or a bad FTP password: issues that won't be solved by trying the fetch again. Set to `true` if you believe the connector information has more time sensitivity than the next connector run. The fetch attempts, and the duration of time between fetch attempts can only be controlled by SaaS operations to control the impact on servers.

`connector.ftp.input.remoteDirectory`
 	
`connector.local.input.localDirectory`
	Only one of these two properties applies, depending on the value of connector.input.file.location.
	
	• The `remoteDirectory` property applies only if the `connector.input.file.location` property is set to FTP.
	• The `localDirectory` property applies only if the `connector.input.file.location` property is set to local.
	
	The value of either property must be an absolute URI. For example:
	
	`/root/connectors/input`
	`c:\\connectors\\input`
	
	The FTP server settings are shared for input and output files. They are described in a different section in this topic.

Property	Description

`connector.input.file.name.tenant.suffix.enable`
`connector.input.file.name.tenant.suffix.override`
	Together, these properties control how the system identifies a SaaS customer's connector data file, so they apply only to SaaS customer.
	
	If you are a SaaS customer, set the enable property to `true`.
	
	`connector.input.file.name.tenant.suffix.enable=true`
	`connector.input.file.name.tenant.suffix.override=`
	
	You then end the connector file as _<your tenant ID>.txt. For example, if your tenant ID is `t1`, then you set your file name to something like organization_data_t1.txt: The text "organization_data" is specified as the name for the organization connector. You add "_t1" to the name because that is your tenant ID. Finally, the file type is text, so the name ends with ".txt" for all connector data files.
	
	If you set a value for the override property, then you use that value instead of your tenant ID. For example, if you supply the value ABC:
	
	`connector.input.file.name.tenant.suffix.enable=true`
	`connector.input.file.name.tenant.suffix.override=ABC`
	
	In this scenario, you add _ABC.txt instead of your tenant ID. We recommend that you use a tenant ID to make troubleshooting easier through a more consistent cross-customer approach in the SaaS environment.

`connector.pgp.enabled`	If you encrypt the data file, set to `true` so that the system can decrypt the files. If this setting is set to `true`, it will impact all connectors. If the connector does not find a .pgp file, it will still process other file types such as .csv, .txt., and .zip. Encrypted files are common when they contain sensitive information, like user identification numbers. If this setting is set to true, it will impact all connectors. If the connector does not find a .pgp file, it will still process other file types such as .csv, .txt., and .zip.

Property	Description

`connector.pgp.public.keyring`
`connector.pgp.secret.keyring`
`connector.pgp.passphrase`
`connector.pgp.file.extension`
	The connector.pgp.public.keyring property value is the public keyring used by the system to decrypt the encrypted files. The keyring must be provided to the party that is generating the PGP encrypted file so that the encryption and decryption match. The keyring value is a base64 encoding of the binary keyring file. Use the Linux base64 command or other tool for decoding the property value to obtain the public keyring file that needs to be provided to both ends of the transaction.
	The secret keyring, passphrase, and extension are standard PGP encryption properties. The extension is usually `.pgp`.

Connector FTP Properties

These properties are shared by both the data and log files: they are where the connector gets the data file and where (when enabled) it delivers a log file.

Property	Description
`connector.ftp.protocol`	The protocol used by the FTP server. Valid values are `ftp`and `sftp`.
`connector.ftp.server`	The name of the FTP server. For example, `ftp.acme.internal`.
`connector.ftp.port`	The port that the FTP server listens to. For example, `22`.
`connector.ftp.userID`	The user ID on the FTP server that owns this process. When specifying the user, make sure that the user has access to the directors where the system reads data files and writes log files.
`connector.ftp.password`	The password for the user. The password is clear text until you save the *CONNECTOR* file. On save, the system encrypts the value.

23.5.2.13 Enabling Updates to Inactive Revisions of Learning Items Through Connectors

You can manage updates to older and inactive revisions of learning items through Item Connector. You've an option to protect inactive revisions or allow updates to items.

Context

Managing older revisions provides visibility into the time line of changes and is critical for companies who revise learning items to meet the requirements of a regulatory body. For example, if you have a course called **Warehouse Safety, version 1** and your regulator comes out with new advice, learning administrators revise it to **Warehouse**

Safety version 2. . This can allow, for example, users who are mid-way through version 1 to finish it. At some point in most company's revision processes, however, the old revision becomes inactive: it still exists so that you can see the revision, but it isn't assigned to users. However, in most cases, if an earlier revision is inactivated, it's never updated again through the connector or by learning administrators.

Procedure

1. Go to *System Administration* > *Configuration* > *System Configuration* > *CONNECTORS*.
2. Locate `item.connector.inactiveRule.updateNotActive`.
3. To allow updates for inactive items, set the property to **`true`**.

   It allows for revising and updating older revisions of items even if they were previously deactivated. By default, the property is set to **`false`** to prevent accidental modification of past revisions. When set to false, the connector will reject updates to inactive items.

   For example, if you've an item with two revisions: Rev1 (active) and Rev2 (inactive), and you're want to update Rev2 using the connector. When `item.connector.inactiveRule.updateNotActive` is set to `true`, the update is applied. If `item.connector.inactiveRule.updateNotActive` is `false`, the update is rejected.
4. Choose *Apply Changes*.

23.5.2.14 Using Connectors to Control Access to Online Content in Blended Offerings

You can use the class connector to control whether unregistered users can launch online content or only those users who are registered for the class can lunch online content.

If you load your classes and their time slots with a class connector, you can control whether users must register for blended courses before they can have access to the online content or if they are able to launch it regardless of whether they are registered. How you control access depends on your company policy for the classes.

To control access to online content in blended offerings, set the `ONLINE_ACCESS_ALLOWED` column to **`Y`** to allow unregistered users access online content. Set it to **`N`** to deny unregistered users access. Set it to `null` to inherit the value for the time slot from the class.

> **Note**
>
> If the connector tries to create a time slot that does not exist in the class's parent learning item, then `ONLINE_ACCESS_ALLOWED` is set to `N` and you cannot override it.

You can set the default value of `ONLINE_ACCESS_ALLOWED` in *System Administration* > *Configuration* > *System Configuration* > *CONNECTORS*. Set `scheduleoffering.connector.defaultValue.segmentOnlineAccessAllowed` either **`Y`**, **`N`** or **`inherit`**.

23.5.3 Scheduling a Background Job

Schedule a background job when your SAP SuccessFactors Learning implementation requires you to run one to accomplish your task.

Context

During implementation, you set up rules for when a job should be run in the background. Typically, you, as a learning administrator, are required to push jobs to the background when you are affecting a large data set at once. For example, if you are propagating assignment profiles, you are potentially saving a large set of rules. When you affect a large data set, your implementation rules won't allow you to run the job in the foreground. You are presented with a background job form to push the job to the background.

Procedure

1. When you are working and you see a *Schedule a Background Job* page, you can try to run the job immediately or you can schedule the job for later.
    - Select *Run this job immediately, if allowable* to try to push the job to the background and then immediately run it in the background. Depending on the job rules set up during implementation, you might not be able to run this job immediately. SAP SuccessFactors Learning looks at the size and type of job you are submitting and checks it against the rules. If you are not allowed to run it, you see a message. Return and schedule it.
    - Select *Schedule this job to be executed on: View Available Time Frames* to schedule the job for later.
2. If you select *Schedule this job to be executed on: View Available Time Frames*, you can click the *View Available Time Frames* link to see the time frames when you are allowed to run the job.

    You set up the background job time frames during implementation.
3. If you select *Schedule this job to be executed on: View Available Time Frames*, then based on the time frames that you are allowed to run the jobs, use *Date*, *Time*, and *Time Zone* to schedule the job.
4. Type a description of why you are running the job in *Description*.

    The description helps system administrators troubleshoot your job. They see it in the background jobs search page.
5. To be notified when the background job completes, select *Notify via email upon completion* and then type your email in *Email*.
6. Click *Finish*.

23.5.3.1 SAP SuccessFactors Learning Background Jobs

SAP SuccessFactors Learning background jobs run in their own system, outside of other SAP SuccessFactors jobs, but they do the same thing: offload processing to the background to allow you to continue working.

SAP SuccessFactors Learning background jobs take large jobs (like propagating data to a large amount of database records) and push the processing to the background. Because they push large jobs to the background, you can continue to work in the foreground. You don't need to wait for the job to finish before you can do your next task.

You can manage SAP SuccessFactors Learning background jobs by going to Learning Administration and then going to *System Administration* > *Background Jobs*. There, you see jobs that administrators have scheduled and that the system has completed. If a job has completed, you can view the details of the job. If the job has not yet run, you can click *Edit* to manage the job.

23.5.3.2 Background Jobs Summary Tab

View this section if you want to edit or view background job information.

In *System Administration* > *Background Jobs* > *Summary tab*, you can edit (if the background job has not been run) or view (if the background job has been run) background job information.

This Field...	...Is Used as Follows
Job Title	The unique ID of the job. The system assigns this ID.
Owner	The owner of the process thread. For manually started processes, the owner is the administrator who scheduled the process. For automatic processes, it is the system.
Completed	The date and time that the background job finished. If it is null, then the process is scheduled, running, or has failed. See the Status column for more information.
Description	Description provided by the administrator who manually scheduled the job or by the administrator who set up the automatic processes.
Submit Date	The date and time the background job was submitted. For manually scheduled jobs, it is the date the administrator completed the Background Job fields and submitted it to be run. For automatic processes, it is identical to the start date.
Status	The status of the job. Successful jobs finished as expected. Check the logs (configured by Log4J) for the reason for the failure.
Started	The date and time that the process started (not the date and time it was scheduled).

23.5.4 Troubleshooting Learning Automatic Processes

Troubleshoot Learning automatic processes if you see a problem with work that the automatic process is supposed to do.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Automatic Processes*.
2. Go to the specific automatic process that you want to troubleshoot.
3. Check the fields in *Status*.

   For example, if you see a last execution result that isn't successful, then you know that the process has a problem. Or, if you see an unexpected last execution time or next execution time, you might have an unexpected schedule change (an administrator might have mistakenly changed the schedule).
4. If you don't see anything obvious in the status fields and if the last execution wasn't successful, click *View Errors* to check the error log.

Related Information

Scheduling Learning Automatic Processes [page 1245]

23.5.4.1 Assignment Profile APM Settings in LMS_ADMIN

An assignment profile is a user group that users are assigned based on their attributes. Administrators set up assignment profiles in SuccessFactors Learning Administration, and the Assignment Profile APM periodically synchronizes the assignment profiles by running through new and changed user attributes to sort users according to their profile. This topic describes the properties in LMS_ADMIN that affect the assignment profile APM.

Assignment profiles create groups of users. For example, administrators can make an assignment profile that includes all users in a particular city. The system looks for the CITY attribute of the USER object and assigns all matching USERs to the new assignment profile (a group of users in the same city). When administrators add or change an assignment profile, they must propagate it, meaning that the system runs through all user records to find users in a matching city to put in the new assignment profile.

Propagation and synchronization are two different processes. Any time an assignment profile is created or changed, it must be propagated through a background job before it can be synchronized through the automatic process. Assignment profiles that are not propagated are skipped during the assignment profile synchronization process.

Property	Description
`assignmentProfileBatchSize`	The *assignmentProfileBatchSize* property contains the number of database records processed at once when assignment profiles are synchronized.
`assignmentProfileMetaDataCache`	The *assignmentProfileMetaDataCache* property determines if the operator data for the Assignment Profile APM (such as city = Washington AND job position = Engineer II) is cached in the memory or read from the database every time. We recommend you set to true for production environments and false for development environments.
`assignmentProfileQueryHelper`	The *assignmentProfileQueryHelper* property contains the Java class that handles the Assignment Profile APM queries.
`assignmentProfileTxnCommitBatchSize`	The *assignmentProfileTxnCommitBatchSize* property contains the number of records to be committed to the database at once within any one batch for the Assignment Profile APM. This number must be smaller than the DatabaseBatchSize.

23.5.4.2 Generic APM Settings in LMS_ADMIN

This topic describes the properties in LMS_ADMIN that apply to Automatic Process Management (APM) that do not apply to assignment profiles.

Property	Description
`apmJobSettings.*.sleepMilliSecondsBetweenBatches`	In the `apmJobSettings.*.sleepMilliSecondsBetweenBatches` property, the * represents one APM. For example, `apmJobSettings.TRNGEXPIRE.sleepMilliSecondsBetweenBatches` controls the training expiration APM. Set to the number of milliseconds that the job pauses between batches. Increase this number to pause big jobs momentarily so that other processes can use CPU time during the pause.
`apmJobSettings.*.enabled`	In the `apmJobSettings.*.enabled` property, the * represents one APM. For example, apmJobSettings.TRNGEXPIRE.enabled controls the training expiration APM. Set to true to enable the other settings for that APM.

Property	Description
`apmJobSettings.*.transactionCommitSize`	In the `apmJobSettings.*.transactionCommitSize` property, the * represents one APM. For example, apmJobSettings.TRNGEXPIRE.transactionCommitSize controls the training expiration APM. The property contains the size of the batches that are committed at once to the database when the job runs.
`emailArchivePurgeBatchCount`	The amount of email messages to be purged at any one time. Default: 1000. Not used unless the purge settings are correct in Global Variables.
`numberOfRecordsToBeProcessedInABatch`	The `numberOfRecordsToBeProcessedInABatch` property contains the batch size (in records) that are changed when a batch process runs. Set to zero to stop batching for background jobs. You might set to zero in a development environment.
`lateTimeWindow`	The `lateTimeWindow` property defines an expiration time, in minutes, for late jobs. By default, it is set to 30, meaning that if a job is more than 30 minutes late in running, it expires and is skipped.
`enableMakeupFiring`	The `enableMakeupFiring` property allows the most recently scheduled job to occur in a case where the scheduling engine has been down and, as a result, a reoccurring job was skipped. For example, if a job runs daily at 5 P.M., the `lateTimeWindow` property is set to 30 minutes, then the engine has been down for a month, and you bring it back up on June 1 at 1 A.M. If the `enableMakeupFiring` property is false, then the daily job does *not* run because you started the engine after the 30 minutes set in the `lateTimeWindow` property. If the `enableMakeupFiring` property is set to true, then the most recent daily job *does* run at 1 A.M. when you start the engine.
`LearningEventResynchronizationStudentCommitCount`	The `learningEventResynchronizationStudentCommitCount` property contains the number of users who are committed to the database in any one batch for the Learning Event Resynchronization job. If it is set to zero, then no commits occur until the entire job has completed. The Learning Event Resynchronization assigns users to learning events and can be run through a wizard in the Administration environment.

Property	Description
`OnlineOperationMaxRecordsCount`	The Max Records Threshold is stored in LMS_ADMIN in the `onlineOperationMaxRecordsCount` property. The value of the `onlineOperationMaxRecordsCount` property is the trigger that forces administrators to run the job asynchronously (See image below). If the number of records affected is less than or equal to the count, administrators can run the job synchronously (They can select `Run this job immediately, if allowable`). If it is above the count, they must run it as a background job.

Property	Description
`allowableBackgroundJobTimeframes*`	The `allowableBackgroundJobTimeframes*` properties are the times that administrators can schedule a job to execute. Make them times when your environment is under light loads and can therefore run the larger batch jobs. Background jobs can be scheduled only during allowable time frames, described below with the allowableBackgroundJobTimeframes settings. Each allowableBackgroundJobTimeframes property defines a window: a date and time during which administrators can run a background job. Make them times that the system is under light loads. By default, each day is contained in brackets. '...[Monday].enabled' means that background jobs will run on Mondays. However, the bracketed text is just a string to denote one window. You could also, for example create a [Weekdays] and [Weekends] window. The default below one example of a non-day bracketed value, [Christmas]. For each bracketed day, you can define start and end minutes, hours, dates, months, etc. A * means any of the unit. so if you have a * in minutes and start/end hours between 0 and 5, then jobs can start on any minute between the hours of Midnight and 5 AM. Hours are in 24-hour format so that 0 is Midnight and 13 is 1 PM. • An asterisk (*) indicates **all**. For example, an asterisk in the minutes property means jobs can be run all minutes in the hour specified in the hour property. • All values in the end time properties must be greater than the corresponding attributes in the corresponding start time properties. • End hours include the specified hour. For example hour 0 through hour 5 is equivalent to midnight through 05:59:59. • Hours are in the 24-hour format. 1 P.M. is hour 13. Time frames are relative to the DBMS time and time zone. The Administration environment does **not** display the available time frames in the administrator's time zone. If your database is in GMT, all available time frames appear in GMT.

23.5.5 Scheduling Learning Automatic Processes

Schedule Learning automatic processes to determine how frequently the processes run.

Context

Before the system runs an automatic process, set a time and also indicate how frequently you would like the automatic process to be run: weekly, monthly, hourly, and so on. When you schedule an automatic process, you're setting up a recurring timer to trigger the automatic process.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *Automatic Processes*.
2. Under *Automatic Processes*, open the process that you want to schedule.
3. To enable the process to run, select *Schedule This Process*.
4. Decide on the period that you want to run this process.
   - Select *Daily* to run the process every 24 hours.
   - Select *Weekly* to run the process one day every week, and then select the day that you want to run it in the *Day* list.
   - Select *Monthly* to run the process every month, and then select the day of the month that you want to run it.
5. In *Time of Day*, set the time of day for the process to run and then decide on the time zone for that time in *Time Zone*.
6. In *Email Address*, type the address of the learning administrator who is setting up the automatic process and who wants to be notified about the success or failure of the automatic process.

   > **Note**
   >
   > This email address is in addition to the normal recipients of email notifications. This additional recipient receives a copy of the notice, and in certain processes comprehensive list of all users or offerings that are affected.
   >
   > When automatic process jobs fail, notification emails are sent to the designated recipients to ensure timely awareness and action. However, success emails aren't sent for all jobs, especially those that run frequently, to prevent recipients with repetitive notifications.
7. Click *Apply Changes*.

23.5.5.1 Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes

Use the Automatic Process status fields when you troubleshoot SAP SuccessFactors Learning automatic processes.

Each automatic process reports its status. Go to SAP SuccessFactors Learning Administration, go to *System Administration* > *Automatic Processes*, and then select an individual automatic process to see its status.

This Field...	...Is used as follows
Last Execution Result	If the Automatic Process is running correctly, the status is Success. If it's another status, then the process didn't run properly. Click *View Errors* to investigate.
Last Execution	This is the date and time the automatic process was last run. You can use this information to see when the automatic process did its work and see if users got the results. For example, if the assignment profile process has not yet run for today and you're investigating recent changes to assignment profiles, then it could be that you just need to wait for the next run of the process.
Current Status	This is the status of the process for its next run.
Next Execution	The next date and time at which the automatic process is scheduled to run.

23.5.5.2 SAP SuccessFactors Learning Automatic Processes

SAP SuccessFactors Learning automatic processes are unique to Learning. They're background jobs that run on a regular interval to do small jobs like cleaning up Learning data or synchronizing Learning data.

SAP SuccessFactors Learning automatic processes are unique to Learning. They affect Learning data but not data stored in SAP SuccessFactors Platform. As a Learning customer, you have a mix of Learning automatic processes (background jobs) and also SAP SuccessFactors Platform jobs.

Learning data affected by Learning automatic process includes:

- Course and class assignment
- Notifications about learning, including class scheduling, assignment, teaching responsibilities, and so on
- Learning engagement, including automatic recommendations, newsletters, and so on
- Synchronization and management of users' learning, teaching, and learning administration data: data that applies to the user as a **learner**, **instructor**, or **learning** administrator in your organization

SAP SuccessFactors Platform handles other types of jobs, like user data, compensation jobs, employee performance, and so on.

You can manage background jobs in SAP SuccessFactors Learning Administration by going to *System Administration* > *Automatic Processes*.

23.5.5.3 Assessment Notification

Starting in Q3 2018, creating an automatic process to keep assessment processes on track using the automatic process id is retired.

This has been retired because it is now part of the legacy Plateau products. You must switch to the standard SAP SuccessFactors products to use the automatic process id.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4 SAP SuccessFactors Learning System Health Automatic Processes

Schedule the SAP SuccessFactors Learning system health automatic processes so that your SAP SuccessFactors Learning runs well.

Many automatic processes are for your system health. They run to optimize your system or purge old data. You set them up during your implementation and rarely reschedule them afterward.

Most system health automatic processes can run weekly, not daily because they do not affect your users. You can schedule them over a weekend.

23.5.5.4.1 Scheduling the Curriculum/Program Maintenance Process

If you **don't** schedule the Curriculum/Program Maintenance process, then incorrect curricula and program assignments can remain with users. This process will modify active and inactive Curricula and Programs.

Context

Curriculum/Program Maintenance removes the relationship between an earlier revision of a learning item and the related curriculum or program. When Curriculum/Program Maintenance finds that both of the following conditions are met, it removes the earlier revision of the learning item:

- Two or more revisions of a learning item are related to the same curriculum/program or are directly assigned and not in a curriculum or program
- The two or more revisions of the learning item are both effective (have an effective date before today's date)

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Automatic Processes* > *Curriculum/Program Maintenance*.
2. Look at *Last Execution Result* and *Last Execution* to see if the process ran recently and that it succeeded.

   If you see that it tried to execute recently but **didn't** succeed, then the process is scheduled but something went wrong. Click *View Errors* to troubleshoot.
3. Click *Schedule This Process*.
4. Set a schedule for the process.

   Unless you have a good reason to schedule it differently, you can run the process daily at a time and time zone when most of your users aren't on the system.
5. In *Email Address*, type an email address of a person or distribution list who is responsible for the process.

   The process sends an email notification (using the ApmQualificationCleanup template ID) that sends the list of affected curricula to the address in the *Email Address* field. This automatic process sends out email notifications when it finds multiple revisions of an item, with concurrent effective dates, associated with the same curriculum or program.
6. To include directly assigned learning items in the logic of Curriculum/Program Maintenance, select *Include assigned Items not in a Curriculum or Program*.
7. Choose *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]

Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.2 Scheduling Verified Email Domain Synchronization Automatic Job

You can set up the *Verified Email Domain Synchronization* automatic process to synchronize the latest list of verified email domains from the SAP SuccessFactors Platform with Learning at regular intervals.

Prerequisites

- You have the *Edit Verified Email Domain Synchronization Automatic Process* permission.
- You have the *Enable Email Domain Validation* enabled from *Learning Administration* > *System Administration* > *Configuration* > *Global Application Settings* > *Mail*.

Procedure

1. Go to *Learning Administration* > *System Administration* > *Automatic Processes* > *Verified Email Domain Synchronization*.
2. In *Schedule*, set the period for your synchronization process.

   > **Note**
   >
   > The job runs by default every 24 hours (*Daily*). However, you can adjust the frequency to weekly or monthly, if necessary. The *Schedule this Process* option is grayed out. You can't deselect the option when the email domain validation is enabled in your tenant.

3. Choose *Apply Changes*.

Next Steps

If you see a problem with the job execution, look at *Last Execution Result* and *Last Execution* in *Status*. Choose *View Errors* to check the error log of the current job.

23.5.5.4.3 Scheduling the Purge Expired Library Items Process

Schedule the purge expired library items process in SAP SuccessFactors Learning to automatically remove expired items from libraries.

Context

When you set up libraries, you want to set an expiration policy so that old courses don't live indefinitely in the system. You set up expiration dates in the library so that this process can find them and notify you to remove them. The process sends email notifications when it finds an item in a library with an expiration date in the past. It removes the items from the library that still have the items listed.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Purge Expired Library Items*.
2. In *Schedule*, set the period for the optimization process.
3. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.4 Scheduling the Reset Online Item Process

Schedule the reset online item process in SAP SuccessFactors Learning to reset learners' progress for online courses when they take a long time to complete the course.

Context

The reset online item process prevents forgotten online courses. From time to time, users launch an online course and then forget to return to it. When they forget, SAP SuccessFactors resets the course and sends a notification

when it finds forgotten courses. When SAP SuccessFactors resets a forgotten course, users must restart the course. Restating might require a reauthorization.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Reset Online Item Progress*.
2. In *Schedule*, set the period for the optimization process.
3. In *Reset User's Progress after Inactivity*, type the amount of days that a user can take to complete the course before SAP SuccessFactors resets it.

   Go to *Item Record* > *Online Content* > *Settings* > *Launch*. If you type **`10`** in *Reset User's Progress after Inactivity*, then a user has 10 days from the time that they first launch the online course to the time that SAP SuccessFactors resets it.

   > **Note**
   >
   > Learners typically have a little longer than the exact number of days in *Reset User's Progress after Inactivity* because this process runs periodically. Users have the time in *Reset User's Progress after Inactivity* plus the amount of time to the next run of this process.

4. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.5 Scheduling the Program Enrollment/Withdrawal Process

Schedule the Program Enrollment/Withdrawal process to take advantage of the VLS (Virtual Learning Service) auto-enrollment for learning programs.

Context

When an assignment profile assigns users to a class, users are automatically enrolled in the course. When the class is part of a learning program, and when the class has a segment conducted over VLS, the VLS portion of enrollment is offloaded to the programs VLS enrollment process: *Program Enrollment/Withdrawal*.

If an assignment profile withdraws users from programs with classs, the VLS portion of the withdraw is also handled by this automatic process. The user is unenrolled by the assignment profile but remains a participant in the VLS segment until *Program Enrollment/Withdrawal* runs.

We offload the VLS portion of enrollment for programs because of the batch size. Programs have the potential to enroll many users during one assignment profile, and the VLS portion of enrollment is a performance-intensive process.

> **Note**
>
> This process applies to enrollment that occurs outside of assignment profiles (for example, an administrator enrolling a user).

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Program Enrollment/Withdrawal*.
2. In *Schedule*, set the period for the optimization process.
3. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.6 Scheduling the VLS Attendance Processing Process

Schedule the VLS (Virtual Learning Service) attendance process to retrieve attendance data from the virtual meeting room vendor and apply it to users' training history.

Prerequisites

Configure the VLS server: Enabling the Virtual Learning Service

Context

Use VLS Attendance Processing to retrieve attendance data for Virtual Learning Service (VLS) events that have ended. The process uses that data to record learning events for classes that have VLS segments and are configured to automatically record learning events.

Procedure

1. Go to *System Administration* > *Automatic Processes* > *Process VLS Attendance*.
2. Schedule the automatic process using the fields in the *Schedule* area.
3. Identify an email distribution list to be responsible for the process and add the address in *Email Address*.

   The automatic process notifies the distribution list with the amount of VLS events that had attendance data successfully retrieved and the amount of learning events recorded. It also triggers the record learning event trigger, which sends its own emails.
4. In *Schedule End Date Threshold*, select the number of days in the past that the process looks for completed VLS events.

   Select a number of days that is greater than your schedule.
5. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.7 Synchronizing Open Content Network Third-Party Provider Course Listings

Synchronize the course listings of Open Content Network (OCN) third-party providers with the Learning Management System (LMS).

Prerequisites

Before you can set up synchronization, you must sign up with an OCN third-party provider and you must enable them in system properties.

Context

You synchronize with OCN third-party providers because you need to keep your list of available OCN courses in sync with changes that OCN third-party providers make. For example, the provider updates the course content. You want SAP SuccessFactors Learning items to be updated with the new course content.

> ⓘ Note
>
> The synchronization process using agile project management is a legacy method that is still applicable to some providers. We recommend that you use the OCN Course Push API method as the primary method for all third-party providers to push their course metadata to the customer environment.

The process runs for all OCN third-party providers you enabled in *System Administration* > *Configuration* > *System Configuration* > *OPEN CONTENT NETWORK*.

You can now add multiple contents to Open Content Network (OCN) courses. The OCN course gets automatically updated with the newly added content, and these contents are automatically assigned to the assigned learners of the OCN course. The **ReassignOCNCourseItemToStudentApmJob** background job runs every 6 hours, but you can also schedule the job to be run on-demand by running the **Open Content Network Content Synchronization** automatic process.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Automatic Processes* > *Open Content Network Content Synchronization*.
2. Set the standard scheduling fields to decide how often you want your process to run.

   > → Tip
   >
   > Most companies can set their synchronization process to run weekly except for the first time it runs. If you're scheduling it for the first time, run it daily five minutes in the future in your time zone. This forces

> a synchronization so that you can proceed to import courses. After you import courses, return to the automatic process schedule it to run weekly.

3. Choose *Apply Changes*.

Next Steps

After the synchronization process runs, you can see the providers' courses in *Content* > *Open Content Network*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.8 Scheduling the Clean-Up of Optional Overdue Course Feedback Surveys

Schedule the clean-up overdue evaluations process to remove course surveys from users who haven't completed them after a set amount of time.

Context

After users complete a learning item, learning administrators can assign the user a learning item evaluation. The evaluation is a course survey: it polls participants for feedback on the quality of the course, what participants learned, the strength of the instructor, and so on. The evaluation can be required for users to complete, but often it's optional.

When evaluations are optional, however, users can decline to complete the evaluation. When the evaluations remain incomplete on users' assignments, they become overdue, and they clutter users' assignment lists. To avoid the clutter, schedule the clean-up overdue evaluations process. Overdue evaluations are evaluations that are past their due date.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Purge Optional Overdue Course Feedback Surveys*.
2. In *Schedule*, set the period for the optimization process.
3. Click *Apply Changes*.

Results

When the process runs, it removes overdue evaluations that are optional and unstated. If a survey is required, the process doesn't remove it. If a learner started an evaluation, we assume that the user wants to complete the evaluation but was interrupted so the process doesn't remove it.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.9 Scheduling Course Feedback and Follow-Up Surveys Email Notification Process

You can set up the *Course Feedback and Follow-Up Surveys Email Notification* process to periodically send email notifications about survey assignments for both item evaluations and follow-up evaluations.

Prerequisites

For every course that uses evaluations, set the evaluation timing rules in *Learning Activities* > *Items* > *Survey*. The process uses your configuration on the course level (learning item level) to know when to send notifications and what to send notifications for.

Context

This automatic process uses the `ItemEvaluationAssignmentNotification` template to send Item Evaluation email notifications to the affected users and uses the `FollowupEvaluationAssignmentNotification`

template to send email notification to Follow-up Evaluation participants. These notifications includes a direct survey link, allowing learners to navigate directly to the survey they need to complete.

> **Note**
>
> - The Course Feedback and Follow-up Survey Email Notification Automatic Process will trigger notifications to the email address mentioned in the schedule page only if the Job fails with any errors.
> - If the job is successful, then there is no email sent regarding the success status to email address.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Course Feedback and Follow-Up Surveys Email Notification*.
2. In *Schedule*, set the period for the optimization process.
3. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.10 Scheduling the Deny Expired Approval Processes

Schedule the Deny Expired Approval Processes to cancel any pending approval requests for registration or withdrawal requests after the requests expire.

Context

If you're using approval processes for users to enroll in or withdraw from classes, some of those approval requests aren't approved before they expire. The *Deny Expired Approval Processes* automatic process cancels any pending approval requests for registration (enrollment) or withdrawal that have expired. An approval request expires when:

- The date in *Registration Close Date* has passed for a registration request.
- The date in *Registration Close Date* is blank and the class's *Start Date* has passed for a registration request.
- The date in *Last Date to Withdraw* has passed for a withdrawal request.
- The date in *Last Date to Withdraw* is blank and the class's *End Date* has passed for a withdrawal request.

The process expires the approval request and then also sends a notification to the user confirming the denied request using the `ApprovalProcessRequestExpired` or `ApprovalProcessRequestDenied` email notification templates.

> **Note**
>
> The *Hide pending approval requests after registration closes or withdrawal date passes* setting controls whether expired approval requests display to approvers. The automatic process removes the expired approval requests. They are independent of each other.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Deny Expired Approval Processes*.
2. In *Schedule*, set the period for the optimization process.
3. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.11 Scheduling the Set Account Request Approval Process

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

Prerequisites

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

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

Context

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

Procedure

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

Next Steps

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

23.5.5.4.12 Scheduling the Restart or Stop Approval Process Automatic Process

Schedule the Restart or Stop Approval Process automatic process to manage Learning approval processes.

Context

The clean up approval processes automatic process does the following to keep approval processes running properly:

- Stops approval processes associated with online items when the online item is removed from the user's learning plan

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Restart or Stop Approval Process*.
2. In *Schedule*, set the period for the optimization process.
3. Click *Apply Changes*.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.4.13 Scheduling the Process Pending Learning Event After E-Signature Disabled Automatic Process

Schedule the Process Pending Learning Event After E-Signature Disabled automatic process to automatically process pending learning events that do not require E-Signature validation.

Context

This automatic process will process pending learning events to the learning history for which E-Signature has been disabled at the global or individual level. When an administrator turns off E-Signature on an item, they will receive a system message informing them that all pending unverified learning events will be moved to the learning history after this process runs.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration* > *Automatic Processes* > *Process Pending Learning Events After E-signature Is Disabled*.
2. In *Schedule*, set the period for the process.
3. Click *Apply Changes*.

23.5.5.4.14 Scheduling Capabilities Synchronization Process

Schedule the Capabilities Synchronization automatic process to sync capabilities from Center of Capabilities to SAP SuccessFactors Learning in a recuring timer.

Prerequisites

You've migrated your tenant to Job Profile Builder (JPB).

Procedure

1. Go to *System Administration* > *Automatic Processes* > *Capabilities Synchronization*.
2. Look at *Last Execution Result* and *Last Execution* to see if the process ran recently and that it succeeded.

   If you see that it tried to execute recently but **didn't** succeed, then the process is scheduled but something went wrong. Choose *View Errors* to troubleshoot.
3. Select the *Schedule This Process* checkbox.
4. Set a schedule for the process.

   Unless you have a good reason to schedule it differently, you can run the process daily at a time and time zone when most of your users aren't on the system.
5. In *Email Address*, type an email address of a person or distribution list who is responsible for the process.
6. In *Capabilities Synchronization Defaults*, look at the default *PUBLIC* value set for *Security Domain*.
7. **Optional:** Use the magnifying glass icon in the *Security Domain* field to search and choose from a list of security domain names.
8. Choose *Apply Changes*.

23.5.5.4.15 Scheduling Attributes Synchronization Process

You can set up the *Attributes Synchronization* process in SAP SuccessFactors Learning to periodically migrate attributes from Talent Intelligence Hub.

Prerequisites

- You've upgraded to Talent Intelligence Hub.
- You have the *Edit Attributes Synchronization Automatic Process* permission.
- You have the *Search Security Domain* permissions to modify the security domain of the *Attributes Synchronization* job and the *Edit Competency* and *View Competency* permissions to run the job.

Context

By default, the automatic process job is set to run daily to synchronize attributes such as competencies, skills, and custom attributes. We recommend that you to add only competency and skill attributes to items, programs, tasks, and objectives. If you want to modify the default schedule, you can update it only after the integration with Talent Intelligence Hub is complete. However, you can modify the security domain if necessary before the integration triggers.

> ⓘ Note
>
> When the *Attributes Synchronization* is set to run, you can't schedule *Capabilities Synchronization* and *Competency Connector - SF*. These jobs are disabled.

For colocated Learning tenants, delta changes in attributes, for example, if attributes are added, modified, or deleted in Talent Intelligence Hub, these changes are synchronized either in real-time or through the scheduled job, whichever takes precedence.

> → Remember
>
> When the last execution of the process becomes successful, the next execution job is disabled, synchronizing attributes in real time.

Procedure

1. Go to *Learning Administration* > *System Administration* > *Automatic Processes* > *Attributes Synchronization*.
2. In *Schedule*, set the period for your synchronization process.

   > ⓘ Note
   >
   > The standard schedule period is set to *Daily*, that is the process runs every 24 hours.
3. **Optional:** In *Attributes Synchronization Defaults*, use the magnifying glass icon in the *Security Domain* field to search and choose from a list of security domain names.

   > ⓘ Note
   >
   > Attributes default to the *PUBLIC* security domain. The domain assigned in the field is the security domain associated with the attribute.
4. Choose *Apply Changes*.

Results

You can view the synced attributes from the *Attributes* page.

> **Note**
>
> If you see a problem with the job execution, look at *Last Execution Result* and *Last Execution* in *Status*. Choose *View Errors* to check the error log.

Related Information

Troubleshooting Learning Automatic Processes [page 1240]
Scheduling Learning Automatic Processes [page 1245]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Integrating SAP SuccessFactors Learning with Talent Intelligence Hub [page 477]

23.5.5.5 SAP SuccessFactors Learning Finance Automatic Processes

SAP SuccessFactors Learning finance automatic processes apply to customers who track costs or charge for their courses using the finance features of Learning.

A few customers track costs or charge for courses using Learning finance features. For example, you can set a cost for using classrooms, engaging instructors, and so on. You can charge users for the courses, including simple charge back methods. If you're using these features, then you set up the finance automatic processes to manage the system.

23.5.5.5.1 Library Price Update

View this section if you want to create an automatic process intended to update the prices in a library.

In *System Administration* > *Automatic Processes* > *Change Library Price Email Notification*, the automatic process is intended to update the prices in a library. If you schedule this process, then the system updates the prices in a library when a pricing rule (usually in the form of discounts) changes. This process also reports (using the ApmUpdateCatalogPrice template ID) all price changes since the last time the process was executed. This automatic process sends notifications when it finds price changes in the library that haven't been reported to the administrator.

For more information about configuring an automatic process, see Setting up your Automatic Processes.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]

Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]
Automatic Process Templates [page 1146]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.5.2 Coupon Expiration Email Notification

View this section if you want to create an automatic process that cycles through coupon entities for those with dates within the selected Expiration Email Notification Threshold.

In *System Administration* > *Automatic Processes* > *Coupon Expiration Email Notification*, the coupon expiration email notification automatic process cycles through all of the coupon entities, looking for coupons whose *Valid To*date falls within the option that you select in the Expiration Email Notification Threshold area (the system calculates dates differences based on calendar days; the system includes all weekends and holidays, even if you have created holiday profiles). When the system finds a coupon that is about to expire (based on what you select in the Expiration Email Notification Threshold area), it sends an email notification, using the ApmCouponExpiry email notification template, to the person whose email address is saved in the *Owner Email*box on the Coupon Details tab (*Finance* > *Coupons* > *Coupon Details tab*) of the expiring coupon.

For more information about configuring an automatic process, see Setting up your Automatic Processes.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]
Automatic Process Templates [page 1146]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.5.3 Set Instructor Base Cost

The Set Instructor Base Cost automatic process runs at an interval to calculate the cost for an instructor so that it an be used in training planner applications.

In *System Administration* > *Automatic Processes* > *Set Instructor Base Cost*, the *Set Instructor Base Cost* automatic process can be scheduled to set the default Instructor base cost to the government Reporting hourly or adjusted hourly rate in the same currency. Any existing instructor base cost of the same currency will be overwritten. If the government reporting value is blank, it will be set to zero.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.5.5.4 Prepaid Account Low Balance

View this section to create an automatic process that searches full texts efficiently.

In *System Administration* > *Automatic Processes* > *Prepaid Account Low Balance Email Notification*, you can configure the process that sends emails when a purchase order has reached a low balance and should be funded. Users and organizations use purchase orders to pay for training. When their balance runs low, they need to add funds to the purchase order. The Purchase Order Low Balance process sends an email alert to users to fund the purchase order.

The threshold for low balance is stored in each individual purchase order record so that you can tune the replenishment of the funds. For example, a large organization with many people using a purchase order normally has a higher threshold than a small organization with a few people using a purchase order. You can set the threshold higher for the large organization. When the current funds in the purchase order reach the threshold set in the purchase order, the system sends an email to replenish the funds.

The recipients of the low balance email are also set on the purchase order. Often, the person responsible for funding the purchase order isn't directly associated with the learning organization. Also, you might want to include a learning administrator or another user who isn't directly responsible for funding the purchase order. To allow this flexibility, you specify who should receive the email for each purchase order on the purchase order record.

Related Information

Scheduling Learning Automatic Processes [page 1245]
Troubleshooting Learning Automatic Processes [page 1240]
Status Fields for Troubleshooting SAP SuccessFactors Learning Automatic Processes [page 1246]
Scheduling Learning Automatic Processes [page 1245]

23.5.6 SAP SuccessFactors Learning Sites

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

A site is a URL that is unique to a group of Learning-only users. When you create a site, the system generates a URL and then you define the behavior of the site at that URL. You can define how users register, display custom

branding on the site, and provide guest access to the course library. You manage the site from SAP SuccessFactors Learning Administration.

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

23.5.6.1 Sites Summary Fields

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

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

Field Name	Description
Site ID	The unique ID for a specific site.
Site URL (Library)	The Site URL (Library) is the system-generated URL assigned to the site and used by a Learning-only user to access a library of available courses. You can test the URL by copying and pasting it into a browser.
Site URL (Login)	The Site URL (Login) is the system-generated URL assigned to the site and used by a Learning-only user to access the SAP SuccessFactors Learning application. You can test the URL by copying and pasting it into a browser.
SAP Identity Service Application ID	Read-only value that displays after activating Identity Authentication.
Description	The description of the site. The *Description* is only visible to administrators and can be used to understand the purpose of the site and differentiate between sites. Because the content of this field doesn't appear in the user interface or any reports, we recommend that you use the field to fully explain to other administrators the purpose for creating this entity.
Default Security Domain ID	This is the default security domain of users for this site. People who self-register for this site are placed in this security domain. You can associate an entity with a security domain to control the administrators who can access the entity. What an administrator can access and do for an entity depends on how you configured the permissions and security domain group of the role ID that is associated with the administrator.

Field Name	Description
Default Organization ID	This is the default organization of users for this site. People who self-register for this site are placed in this organization. The default organization is important because you most often assign course libraries to a site through the user's organization.
Default Active Locale ID	This is the default locale for users of the site. People who self-register for this site are placed in this locale by default. You can also configure the registration page to allow people to select a locale. The active locale ID references the language and syntax for numbers and currencies of the site.
Currency ID	The default currency of the site, which is important if you want users of the site to pay for their training.
Default Time Zone ID	This is the default time zone for users of the site. People who self-register for this site are placed in this time zone by default. When you select a time zone (for example, Eastern Standard Time), the system automatically displays the record in that time zone. Set the default time zone to the time zone where you expect the majority of the site's users.
Always Display Classes in this Time Zone	If you select this check box, then the system displays classes in the same time zone for all users; however, users can select the *Always Display Classes in this Time Zone* check box in the user interface to show classes in their preferred time zone.
Default User Role ID	This is the default user role ID for users of the site. People who self-register for this site are assigned this user role ID by default.
Default License User Type	This is the default license user type for users of the site. People who self-register for this site are assigned this license user type by default. Values are *Active* or *Functional* and correspond to your SAP global license agreement. This license designation has no impact on a user's capabilities within SAP SuccessFactors Learning.

Field Name	Description
Registration Validation	There are 3 options for validating people who create accounts through a site: *None*, *Site Registration Code*, and *Approval Process*. The default value, *None*, allows people to create accounts without validation. Select *Site Registration Code* to require people to provide a unique code when registering for this site. You need to create the codes (*System Administration* > *Application Administration* > *Sites* > *Registration Codes*) and then provide to people so they can register. Select *Approval Process* to require an approval process for people registering for this site. You need to create an approval process (*References* > *System Administration* > *Approval Process*) and someone in your company will need to approve each person after they register.
Active	Select the checkbox to indicate that the site is in use.
User Interface Display	The User Interface Display options allow you to edit the login page with a What You See Is What You Get (WYSIWYG) editor. Choose *Edit Login Page* to access the editor.
New Account Panel	The text you enter in this panel displays at the top of the registration page to people who are registering to become new Learning-only users through the site. Sites are internationalized. You can use Label IDs from the system to populate this panel and the values are translated based on the locale of the site. This site-specific text displays above the global text defined in *User-Created Account Introduction Message* (*System Administration* > *Application Administration* > *User Created Account*).

Related Information

Locales in SAP SuccessFactors Learning [page 1304]
Activating Learning Currencies [page 834]
Creating Self-Registration Approval for Sites [page 969]
Site Registration Codes [page 1269]

23.5.6.2 Site Registration Codes

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

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

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

This field...	...Is Used as Follows
Code ID	The *Code ID* is the unique code that you supply to users who want to register for the site. For example, if you type the code "Welcome!123" then users wanting to register for this site must provide the code "Welcome!123" along with their account information on the *Create New Account* page.
Description	Use *Description* to describe the code. Because you can have more than one code, you need to describe each code to distinguish them from one another. For example, you might use one code for the Information Technology department and another code for the Sales department. You can write "For IT Department" and "For Sales Department" in the description fields so that you and other administrators can tell the difference between codes.
Max Usage and *Redemptions*	The *Max Usage* field stores the maximum number of times that the code can be used. For example, if you want to give the code to the Sales department, but want only 10 salespeople to sign up, you can set a maximum usage of 10. After you create the code, you see the *Redemptions* column in the table. The *Redemptions* column tells you how many times the code has been used as a fraction of the maximum times it can be used.
Start Date	The start date is the first date that the code can be used. If you want to use the code immediately, set the start date in the past because the start date is relative to the site's time zone, not your time zone.

This field...	...Is Used as Follows
Expiration Date	The expiration date is the date on which the code expires and users must start using a new code. If you expire a code, you must remember to create a new one to start after the current code expires. One strategy is to create multiple codes at once. For example, at the beginning of the year, you can create a code for January, February, March, and so on, with 12 codes total, each lasting a month. January's code starts on the first day of January and ends on the first day of February, overlapping by one day to assure that users can always create accounts. February starts on February First and ends on March First, and so on. As with the start date, the expiration date is in the time zone of the site, not your time zone.

Related Information

Adding Site Registration Codes [page 972]
Sites Summary Fields [page 1266]
User-Created Account (Site) [page 1270]

23.5.6.3 User-Created Account (Site)

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

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

Contact Information

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

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

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

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

Employee Information

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

Finance

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

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

Preferences

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

Custom Fields

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

Related Information

User-Created Account (Global) [page 1201]

23.5.6.4 Assigning a Guest Library to a Site

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

Prerequisites

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

Procedure

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

Related Information

Assigning Libraries to Learners [page 388]

Checking Users' Library Access [page 614]
Libraries: Sets of Courses that Learners can Discover [page 352]
Executing Changes for Assignment Profile Rules [page 382]

23.5.6.5 Viewing the Security Domains and Organizations that Use a Brand for Learning Sites

View the security domains and organizations that use a brand when you offer SAP SuccessFactors Learning to the extended enterprise and want to troubleshoot a brand.

Context

Branding styles customize the landing page of learning sites, which are used in your extended enterprise. If you aren't extending SAP SuccessFactors Learning outside your organization, then branding styles and their security domains and organizations do **not** apply to you.

If users in one part of your extended enterprise see the wrong landing page, then they might be assigned to the wrong security domain or organization or that security domain or organization might be assigned to the wrong site. If you know the brand, you can see that brand's security domains and organizations. You can expect that if a user also belongs to that organization or security domain, they should see the brand **on their landing page**.

> **Note**
>
> After users sign in to learning sites, themes control their branding.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Application Administration* > *Brands*.
2. Open the brand.
3. Go to *Security Domains* to see if any security domains use the brand.
4. Go to *Organizations* to see if any organizations use the brand.

Next Steps

Now that you know the security domains and organizations that use the brand, you can see if the users with the incorrect branding are members of those security domains and organizations. Go to *People* > *Users*, find the users with the wrong brand and check their security domains and organizations.

23.5.6.6 SAP SuccessFactors Learning Brands

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

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

Related Information

SAP SuccessFactors Learning Sites [page 1265]

23.5.6.7 SAP SuccessFactors Learning Brand Summary Fields

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

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

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

23.5.6.8 User Introductions

View this section if you want to make the user introductions appear on the home page.

In *System Administration* > *Application Administration* > *User Introductions*, a user introduction appears on the home page when the introduction is associated with the user's or administrator's branding style.

The *Data* text area must contain a valid HTML snippet, but should only include HTML tags that nest in the `<body>` tags. To include a resource from an extension, you use code like the following:

```
<img src="<resourceURI path="/images/logo.gif" />">
```

That code inserts the logo.gif, prefixed by the proper resource path.

The USER_LOGIN_PANEL and the USER_NEW_ACCOUNT_PANEL are special login panels. The USER_LOGIN_PANEL panel appears to end users and the USER_NEW_ACCOUNT_PANEL appears to new end users. Both panels appear on the login page of the end user environment. You cannot delete these panels. Any changes you make to the panels are also reflected in the *System Administration* > *Application Administration* > *User Settings* page, in the *User Login/New Account Panels* section.

For the *Create New Account* option (under the *Personal* tab) to appear to users, you must select the *Allow Users to create a new account at SuccessFactors Learning login page (Activating Identity Authentication Integration is a prerequisite to self-registration and Learning access)* checkbox (▶ *System Administration* ▶ *Application Administration* ▶ *User Created Account* ▶). To enable the *Click here to register* option for users on the site's login page, check the *New Users* checkbox within the Site Login Page Editor (▶ *System Administration* ▶ *Application Administration* ▶ *Sites* ▶ *Summary (tab)* ▶ *Edit Login Page* ▶) To disable the ability for users to create their own accounts, simply uncheck the *Allow Users to create a new account at SuccessFactors Learning login page* checkbox.

Related Information

SAP SuccessFactors Learning Brands [page 1274]
Sites Summary Fields [page 1266]
Miscellaneous User Interface Properties in LMS_ADMIN [page 920]

23.5.7 Tools for SAP SuccessFactors Learning System Administration

We provide tools to manage your SAP SuccessFactors Learning implementation and system administration.

We provide tools that manage your Learning system: your **implementation** of Learning. You run these tools infrequently, but they are helpful when you have a system-wide issue or you want to change how your system is implemented. For example, if you want to troubleshoot the images used in your implementation, you can run the attachments utilization tool. Or, if you want to clear the cache of unsent emails, you can run the manage unsent emails tool.

23.5.7.1 Expiring Administrator Passwords

Expire administrator passwords after you first implement Learning because you need a Learning password at the moment of implementation but do **not** need them during common operation of SAP SuccessFactors.

Prerequisites

If you want to prevent anyone from using the administrator identity in the future, delete the administrator account.

Context

In almost all cases, SAP SuccessFactors Platform handles platforms and identity management. But when implementers first connect Learning, the implementer needs an administrator password to enable Learning.

After the implementer enables Learning after that, all administrator roles should use identity management from Platform. During this time, you might want to manage the partner personnel by forcing new passwords.

> → Tip
>
> The expire passwords tool is used in such a narrow use case and matters for a short period of time. Consider hiding it with security permissions during normal operation of your system.

Procedure

1. Go to Learning Administration and then go to *System Administration* > *Security* > *Expire All Administrator Passwords*.
2. Click *Expire Passwords*.

Results

If the account still exists, then expiring passwords requires administrators to create new passwords when they next log in. Administrators are asked to provide their old password for verification, then create a new password.

23.5.7.2 Attachments Utilization

View this section if you want to gather more information so that you can manage the attachments in the system.

In *System Administration* > *System Management Tools* > *Attachments Utilization*, you can use the attachments utilization tool to gather more information so that you can manage the attachments in the system. To use the tool, you must enter a date and click *Show Statistics*or*Purge*. If you click*Show Statistics*, then the system shows the attachment statistics up to, but not including, the date you entered. Some of these statistics (for example, total attachment size allocated and maximum size allowed per attachment) come from a setting in the ATTACHMENT configuration ID (*System Administration* > *Configuration* > *System Configuration*). If you click*Purge*, then the system removes all of the attachments from the associated records if the files were attached before, but not including, the date you entered.

If you plan to purge attachments, then we recommend that you check and double-check your dates because you cannot undo a purge.

23.5.7.3 Building a Direct Link in Learning

Build a direct link when you want to send a link that can take users directly to their information in Learning.

Context

Direct links take users to specific pages in SAP SuccessFactors Learning. You can send the links to users so that they can access the pages by clicking the link. Users are asked to provide logon information if they aren't already logged in. You can embed the links in any environment that accepts URL links. For example, you can add the link to an e-mail or a Web page or you can add them to custom cards or banners (in the new Learning experience). Users who click direct links have access to only those sections of the application that their assigned permission restrictions allow.

Procedure

1. Go to Learning Administration, and then go to *System Administration* > *System Management Tools* > *Generate Direct Link*.
2. In *Direct Link Type*, select the place you want the direct link to take users.

   For example, if you select **`Current Registration`**, you're saying that you want the link to take users to their current course registration.

   When a link requires additional information, the wizard prompts you for it. For example, an Item Details link requires the learning item whose details you're interested in showing to the user. A Program Details link requires a *Program ID*, *Program Sections*, and a *Program Section Entry*.
3. Select the kind of direct link you want to create.
   - Select *URL* to copy a URL and paste it into a message (for example, an e-mail message) to users.
   - Select *Tokens* to paste the direct links into notification messages.
4. Choose if the direct link is for learning only users or not.
   - Select *Yes* to indicate the URL is meant for learning only users.
   - Select *No* to indicate the URL is meant for platform users.
5. In *Specify Search Criteria*, add any additional information that the link needs.

   For example, if you link to the reports, page, you select the individual report within the reports page that the user should go to.
6. Choose *Display Link*.
7. Copy the link and paste it into either a direct message to the users or into a notification message.
8. Use the generated link to access the program.

   If the program has an active cover page, the direct link navigates the user to the cover page. Users can access the content by navigating to the content section for which the direct link was created.

   If cover pages are inactive, the users can navigate to the content section for which direct link was created.

> **Note**
>
> If you want users to access a section directly through the URL, consider deactivating the program cover page.

Related Information

Creating Library Directed Search Direct Links [page 376]
Building a Survey Direct Link [page 106]
Enabling Native Deeplink Redirect

23.5.7.4 Label Import/Export

View this section if you want to import or export labels.

In *References* > *Manage Labels* > *Label Import/Export* , you can use the Label Import/Export wizard in the following situations, for example:

- To export labels from a development environment to import them into a production environment.
- To export labels to customize, then import that changed set.
- To import labels changed or added for new reports designed in Plateau Report Designer.

> **Note**
>
> Each label has a limit of 10,000 bytes. Note that the limit is in bytes, not in characters, because some UTF-8 characters are more than one byte.

23.5.7.4.1 Importing Labels

Read this section if you are importing labels, particularly if you are importing a translations of the labels for a locale.

Most likely, you will use the import label tool when you are importing a translation of the labels for a locale or when you want to restore customized label values for a locale. After you select a file to import, you can select a subset of the labels to import. You can remove any labels that you do not want to import by clicking the *Remove* checkbox next to the label and then clicking *Apply Changes*.

We strongly recommend that you add all labels. If you have customized your labels, then we recommend that you:

- Create a backup file of all the labels that you have customized
- Import the provided label files as described here with the *Overwrite Existing Labels* checkbox selected
- Import the backup file of your customized labels with the *Overwrite Existing Labels* checkbox selected

By doing these things, you overwrite your customized labels with the default, provided labels and then re-overwrite the default, provided labels with your customized labels. In short, you get the new and modified labels from SAP SuccessFactors Learning but preserve your customized labels.

> ⚠ Caution
>
> If you are updating an existing locale and you select the *Overwrite Existing Labels* checkbox and click *Finish*, then you will overwrite any existing labels for this locale with new labels. Therefore, if you have customized your labels, you should contact your SAP SuccessFactors Learning account representative to determine if this update is safe for your customizations.

23.5.7.4.2 Exporting Labels

We recommend that you export your labels before applying any patch or service pack so that you can identify and restore any customizations that you have made to the label values. If you want to export **all** labels, then clear all of the search criteria, click *Search*, and then select the *Select all the labels of the search results* checkbox. To export a subset of labels, you can search for the label ID or value that you want to export. For example, to export all labels that appear in HTML alt attributes, you can type alt. in the *Label ID* box (using the *Starts With* condition), click *Search*, and then select the *Select all the labels of the search results* checkbox. When you complete the export wizard, the labels appear in a properties file composed of label ID and value pairs, separated by and equal sign.

> ⓘ Note
>
> If you select the *Select all the labels of the search results* checkbox, then the system applies this to the current search only, not to all labels for the locale.

If your company is localizing data (clicking the localization button (), then we recommend that you clear the *Show only label IDs that have a value* checkbox when you search for labels. By doing so, the system returns every label ID that has a translated value in any other locale other than the one you're exporting labels for. Therefore, when you complete the export, you will have some labels with a label ID (and no value) only. These label IDs are included because an administrator added a translated value for a record in another locale but not for the locale that you exported. In this way, the exported labels serve as a "gap analysis" for your translated data for this locale.

Related Information

Translating Strings in Learning [page 1350]

23.5.7.5 Legacy SCORM Import

View this section if you want to import SCORM files using the SCORM Import/Export assistant.

In *System Administration* > *System Management Tools* > *SCORM Import (Legacy)*, you can import SCORM files using the SCORM Import/Export assistant for a level 1 import. The Legacy SCORM import is superseded by the universal content importer (*Content* > *Content Import*). Using the SCORM Manifest Import Assistant:

1. Click *Browse* to select the SCORM ZIP file you want to import. Click *Next*. You cannot upload files equal to or greater than 1 Mb. If you have files of 1 Mb or more, place your file on a network resource, click the *SCORM ZIP File (URL)*,checkbox, and type the URL.
2. Review the SCORM Manifest Information. Click *Next*.
3. Review the Resolved Content Objects. We recommend that you deploy your content packages before importing a SCORM object since content objects in SCORM use relative paths. Click *Next*.
4. Review the *Content Package ID* and *Title*. Click *Next*.
5. Review the list of *Objectives*. Click *Next*.
6. To complete the SCORM import, click *Finish*.

SCORM (Sharable Content Object Reference Model)

The Sharable Content Object Reference Model (SCORM) defines a Web-based learning "Content Aggregation Model" and "Run-Time Environment" for learning objects. The SCORM is a collection of specifications adapted from multiple sources to provide a comprehensive suite of e-learning capabilities that enable interoperability, accessibility, and reusability of Web-based learning content.

Content Objects

A content object is a record that contains instructions specifying where to find and how to launch a unit of online content such as a course, demonstration, exam, tutorial, or other online application whose content is intended for users. You can create online applications "in-house" using courseware development software or they can be purchased; but in either case, you must create a content object for the application in this window.

Since each content object always has a one-to-one relationship with an actual online application (files or URL addresses), and since each content object must have a title, you may often think of content objects as being synonymous with the unit of online content to which it refers. One or more content objects can be included in an item, so that a single online item may be composed of several online content applications.

Objectives

An objective is a generic learning object such as a grouping of questions that have been created in Objectives section or in Plateau Question Editor. Questions are associated with objectives on the Summary tab of the Questions section (Content area) or by using Plateau Question Editor.

Normally, all of the questions in a given objective should measure the user's mastery of a small, closely related topic, process, task, or unit of instruction in an online item. One or more objectives make up a single content object or exam/survey; and one or more content objects, or exam/surveys, make up an online item. Please note that the objective must exist in SAP SuccessFactors Learning Administration and be assigned to the Content Object in order for the SCORM API to process the objective data.

Content Package

A grouping of objectives and content objects.

23.5.7.6 Importing Data

View this section if you want to import data to SAP SuccessFactors Learning Administration.

Context

You can use the import data tool to make data (for example, data that exists in another database) available in SAP SuccessFactors Learning Administration. This function is useful for when you need to move objects between environments, for example moving objects from staging to production environments.

Procedure

1. Go to *System Administration* > *System Management Tools* > *Import Data*.
2. Select *Download Template* and the corresponding entity from the *Record Type* list. Choose *Submit*. We recommend downloading the template, as they're updated with every release.
3. Insert the necessary data into a spreadsheet and save the file.
4. Select *Import Data* and the corresponding entity from the *Record Type* dropdown list.
5. Select the import option that provides you with the safest process.

   For example, if you're updating an existing record, use *Update*.
6. Select the file you want to upload using *Choose File*, and select your time zone.
7. Choose *Submit*.

   The *Schedule Job* page opens. You can choose whether to run the job immediately, or to schedule to run the job at a later, determined date.
8. Enter or update the job description in the *Job Description* field, and choose *Finish*.
9. Choose *Continue Importing Data*.

Results

When the file is uploaded, it appears in the *Import Results* log, where you can view the *Import ID*, *Date/Time*, *Job Description*, *Job Status*, *Error Log*, and *Delete* columns. If the job fails, you can download the error log from the *Error Log* column. The error log is the same template as the file uploaded; however, it contains the rows with errors, along with a comment at the end of each row detailing why the field failed.

> **Note**
>
> The imported files stay in the system for 30 days, after which the system deletes them using the **PurgeSystemTempTablesApmBackgroundJob** automatic process.

23.5.7.6.1 Roles for Importing Data

View this section if you want to assign permissions to the administrator who imports the administrator roles.

To use the import tool, administrators go to *System Administration* > *System Management Tools* > *Import Data*. Starting with the Microsoft Excel file that the export tool generated, administrators follow the import wizard to import the roles. When importing the roles:

- The tool adds or updates the roles, it doesn't delete roles. For example, if the tool is importing to an environment with 20 existing roles, the Excel file has 5 rows (roles), 3 of which already exist in the 20 and 2 of which don't yet exist in the environment, then after import, the environment has 22 roles:
  - 17 roles untouched by the import tool (these roles are **not** deleted)
  - 3 roles updated by the import tool
  - 2 roles added
  - No roles deleted
- The administrator can import only the role ID, description, and security domain (columns A-C in the Excel template) to add role records and then configure them in the higher environment.
- The administrator can import the role ID, description, security domain, and associated permission IDs to add the roles and permissions with no security domain or entity restrictions.
- The administrator can import everything: roles, permissions, and restrictions. We recommend this approach: configure the entire role in the lower environment and then import everything from the lower environment to the higher environment.

To support the administrator roles import tool, assign these permissions to the administrator who imports the administrator roles:

- Import Data
- Add Role
- Edit Role

23.5.7.6.2 Tips for Importing Data

Read these tips if you're using the import data tool (*System Administration* > *System Management Tools* > *Import Data*).

- The system attempts to add or update records based on what you select from the *Import Option* list. The system attempts to import the record type that you select from the *Record Type* list.
- Because your data must be correctly formatted, you must **not** delete or move any column nor modify a comment in the heading of the workbook. If you don't have data that can go into a cell for that column, then leave that cell blank.

- While you can't delete or move any column, you can add columns to the right of the right-most column on any worksheet; the system ignores those columns when importing data.
- You can't change the name of a tab. If you need additional tabs in the workbook, you can add them; however, the system ignores those tabs when importing data.
- You can't import data if you don't have the permissions to access that data inSAP SuccessFactors Learning Administration.
- The system tries to import your data row by row. When the system can't import the data for some reason (for example, you don't have permissions or security domain groups for some or all of the data in that row, or the value of your data exceeds the maximum length for that data field), then the system skips that row and attempts to import the next row of data. For every skipped row, the system logs that row into a new workbook that you can later download. You can access this information by clicking *Download* link in the Error Log column of the Import Results table. In this new workbook (the downloaded error log), the system also identifies the reason that the data wasn't imported. Because the new workbook uses the same template as the import workbook, you can correct it and use that to attempt to import the data that the system rejected.
- The system won't overwrite data that already exists in the system with a blank value (because, for example, the cell in an Excel workbook is empty).
- The system can only remove the latest revision of an assigned item, whether active or inactive. If you need to remove or edit an old revision of an item from a user's learning plan, you can do so in *Manage User Learning* > *Manage Assignments*.
- If the system updates the manager for a user, then automatically cancels the approval process for any outstanding plan that requires approval for that user. When affected users next access the plan area, they can resubmit those plans for approval. The system also automatically reroutes all of the following approval types:
  - Items
  - Classes
  - External Requests
  - Assessments
  - Performance Reviews
  - Electronic Signatures
- You can view import results only for the jobs that you created; you can't view the import results of import files that other administrators uploaded.
- You can delete any import data job that you initiated if the state for that job is Not Started or Complete; you can't delete an import data job when it is in progress.
- Before you import exchange rate definitions, we recommend that you ensure the exchange rate definitions include all of the currencies you've created (*References* > *Finance* > *Currencies*).
- If your import file for Learning History, Registrations, Learning Assignment, or Curriculum Assignment contains inactive users, records are created for those users. Administrators should review the files to ensure unintended records aren't created for inactive users.

23.5.7.6.3 Concurrent Add and Update Not Supported in Import Tools for SAP SuccessFactors Learning

You can't add and update the same record in the same import file with SAP SuccessFactors Learning data import tools.

SAP SuccessFactors Learning data import tools are in the Learning Administration: *System Administration* > *System Management Tools*. When you use these data import tools, you can't add and update the same record in the same import file.

In the example below, you see one user (jdoe) appear twice. The user appears in the first row and the last row. The import tool rejects this import because you can't add or update the user and then, in the same file, update the same user. This is true for all records that you import.

User ID	Active (*required)	First Name	[additional columns]
jdoe	YES	**Joe**	...
fsmith	YES	Frank	...
llou	YES	Lilly	...
jdoe	YES	**Jane**	...

23.5.7.7 Export Data

View this section if you want to export data to make it available in theSAP SuccessFactors Learning Administration.

In *System Administration* > *System Management Tools* > *Export Data*, you can use the export data tool to make data (for example, data that exists in another database) available in SuccessFactors Learning Administration. This function is useful for when you need to move objects between environments, for example moving objects from staging to production environments.

1. Select the *Admin Role* entity from the Record Type menu. Click *Next*.
2. You can add administrator roles either by entering the Role ID or clicking *add one or more from list*, where you can add/remove criteria to search for roles. Click *Search*. You're presented with a list of Role IDs and Descriptions. Click the *Add* check box next to the desired Role ID and click *Add*. The selected Role ID displays below the Add Admin Roles field. When you've added all desired IDs, click *Next*.
3. You'll always be prompted to export as a background job. Here, you can choose whether to run the job immediately or to schedule to run the job at a later, determined date. At this time, you'll want to enter or update the job description in the *Job Description* box. Click *Finish*.
4. Click *Continue Exporting Data*.

When the file is exported, it appears in the Export Results log, where you'll be able to view the Record Type, Creation Date, Description, Status, and a Delete option. You'll have from 1 to 30 days to complete the task before it's deleted.

23.5.7.7.1 Roles for Exporting Data

View this section if you want to assign permissions to the administrator who exports the administrator roles.

To use the export tool, administrators go to *System Administration* > *System Management Tools* > *Export Data*. Administrators follow the export wizard to assemble the records for export. At the end of the wizard, the system creates a background job to build the Microsoft Excel export file. When the background job completes, the file is available in *System Administration* > *System Management Tools* > *Export Data*.

You can control the amount of export files to appear on the page in *System Administration* > *Configuration* > *System Configuration* > *LMS_ADMIN*. Find the exportExpiration property and change its value to the amount of export files that the system should save before deleting the oldest one.

To support the administrator roles export tool, assign these permissions to the administrator who exports the administrator roles:

- Export Data
- View Role
- Search Role

23.5.7.8 Importing AICC Content with the Legacy Importer

Use the legacy AICC importer if you have AICC files that you need to import.

Context

The Legacy AICC Import tool performs a level 1-compliant import of an AICC (Airline Industry CBT Committee) course. The Legacy AICC import is superseded by the universal content importer: *Content* > *Import Content*.

Procedure

1. Go to SAP SuccessFactors Learning and then go to *System Administration* > *System Management Tools* > *AICC Import (Legacy)*.
2. Select the four AICC import files you want to import and then click *Next*.

   All four files must have the same name.

   For example, the file names can be FILE1.crs, FILE1.cst, FILE1.des, and FILE1.au.
3. Keep the course settings read from the import file or edit them, and then click *Next*.
4. Read the resource resolution information to understand the next resource resolution steps and then click *Next*.
5. On the *Resolve Content Object(s)* page, name the content object that the definition uses and then click *Next*.
6. On the *Resolve Content Players* page, verify the content player settings or specify new ones and then click *Next*.

7. On the Resolve Exam and Survey(s) page, verify the Exam ID settings; or you may specify either other existing ones or new ones and then click *Next*.

   You'll only see the Resolve Exam and Survey(s) step if the course you're importing was exported from SAP SuccessFactors Learning

8. On the *Select Destination* page, decide on the destination of the import.
   - To import the definition to a new course (learning item), select *New Item*.
   - To import the definition to an existing course (learning item), select *Existing Item*. Edit *Revision Date* if you don't want to use the most recent revision date for the selected item.
   - To import the definition to a content package and then later add it to a learning item, select *Content Package*.
9. On *Complete AICC Import*, make final settings to the behavior and then click *Finish*.

Next Steps

Go to the course (learning item) to edit the course: *Learning Activites* > *Items*.

23.5.7.8.1 Supported AICC Import and Export Files

SAP SuccessFactors Learning supports these AICC files for import and export.

AICC defines a method of importing content definitions into a Learning Management System (LMS). Importing the same files twice will produce two sets of data, so any edits that need to be made after importing the content definitions should be made to the actual records in SAP SuccessFactors.

> **Note**
>
> When you import AICC files to SAP SuccessFactors Learning, you do **not** import the actual content. Instead, you import the definition (or setup) of the content.

- The Course file (*.crs): This file contains course-level information about the course as a whole.
- The Assignable Unit file (*.au): This file contains technical information relating to all the assignable units (content objects) in the course (i.e. content object launch url).
- The Descriptor file (*.des): This file contains descriptive information relating to every course element in the course (i.e. content object description). It is used as the basic cross-reference file showing the correspondence of system generated IDs with user-defined IDs for every element.
- The Course Structure file (*.cst): This file contains the basic data on the content structure of the course. It includes all of the assignable units (content objects) and blocks (folders) in the course.

23.5.7.9 Downloading Learning Connector Templates

Download Learning connector templates to see sample import files so that you can see the correct format of Learning connector import files.

Context

When you configure connectors, you usually want to know what Learning expects for the format of the file. Connector files are delimited files where the first row is the header row, so by looking at an example of the headers, you can see data that you can import with the connector file. If you match your delimited file to the template, and if you followed the configuration of the data, you can expect a smooth data import.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* > *Connectors* > *Download Connector Template*.
2. In *Action*, decide if you want to download all headers or only the headers you have already mapped.
   - Select *Download Template (all columns)* if you want to see all possible columns that the connector accepts.
   - Select *Download Template (only mapped columns)* if you want to see what the connector accepts **based on your configuration**. You map columns in *System Administration* > *Configuration* > *System Configuration* > *CONNECTORS*.
3. In *Connector*, select the connector template that you want to download.

   > **Note**
   >
   > Competency - SF and User Connector - SF export from Platform. For these connectors, also check the headers in the export from Platform.

4. In *Supported files*, select the file that you want to export for the connector.

   > **Note**
   >
   > Some connectors, like the learning item connector, use more than one import file.

5. In *File extension*, select the file extension for the export.

   The headers remain the same regardless of the file format you choose, but we understand that some companies restrict the types of files that their employees can download, so we offer you choices.
6. Choose *Submit*.

23.5.7.10 Managing Unsent Email Notifications

Manage unsent email notifications by removing erroneous email before re-enabling email if you have an issue that resulted in erroneous email generation.

Context

You can view the amount of your unsent email notifications, the time frame that the email notifications were generated, and delete unsent email notifications. Unsent email notifications are generated but not yet delivered to the SMTP server.

Deleting unsent email creates a background job that runs immediately as long as the job to send email is not running. The email audit report, which represents all notifications that the system generated, still contains deleted unsent email so the audit trail remains.

> **Note**
>
> Unsent emails that are deleted are never sent to the email recipient(s) and are permanently removed from the system. Once unsent email messages are deleted, they cannot be recovered.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then navigate to *System Administration* > *Manage Email* > *Manage Unsent Emails*.
2. Click the *Delete Unsent Emails* button to delete all unsent email notifications. The *Delete Unsent Emails* button is only enabled when the unsent email notifications count is greater than zero.

   You receive the warning: *You are about to delete all unsent emails. These emails will be permanently deleted. Do you want to continue and delete all unsent emails?*
3. Decide if you want to delete all unsent email notifications.
   - Click *Yes* to delete all unsent email notifications.
   - Click *No* to cancel the deletion.

23.6 SAP SuccessFactors Learning System Configuration

In SAP SuccessFactors Learning, system configuration is a set of properties that you change during implementation and then rarely change again.

In the *System Configuration* section of SAP SuccessFactors Learning Administration, you can edit the configuration files. In general, you change system configuration files during deployment and leave them unchanged until the next time you review your deployment or deploy another part of the system. They are built to be edited by informed technicians.

We recommend that you read the comments to understand how changing the file affects the system. To avoid accidental modification of any one of the files, we recommend that you create backup files for each one. Some changes to the configuration files require restarting the server.

23.7 Environment

This Environment page has information about the SAP SuccessFactors Learning environment.

In *System Admininistration* > *Environment*, you can view existing or install new licenses and check the space used by QuickGuides. If you have no licenses installed, then the default SAP SuccessFactors Learning administrator has access only to the *Environment* page. After you install the proper SAP SuccessFactors product licenses, you can access other sections of the application.

Unsupported Platform User Native Logins Report

The Unsupported Platform Native Logins Report returns a list of Platform users who have accessed Learning through Native Login.

License

Before you can install a license with this page, you must obtain a license file from a SuccessFactors representative, copy that file to your local computer, and log in as an administrator with privileges to install a license (the default administrator has these privileges).

1. Go to *System Administration* > *Environment* > *License* and click *Browse*.
2. Locate and select the license file that you copied to your local computer.
3. Click *Install License*

When the license file installs successfully, you see its individual licenses in the View License table. Each row in the table is a particular license that you have installed. You can use the View License table to verify that your licenses are current and correct (version, number of users, and so on).

QuickGuide Storage

The *Environment* page also includes your QuickGuide storage. Your QuickGuide storage limit depends on your license, and it is one the page. If you reach the limit of your quick guides, you can purchase more space.

23.8 Timeout Behavior in SAP SuccessFactors Learning

The timeout behavior for HTTP sessions hasSAP SuccessFactors Learning been modified for Learning administrators.

If the timeout in SAP SuccessFactors Learning is configured to be less than 30 minutes, then the administrators get logged out of SAP SuccessFactors Learning as well as SAP SuccessFactors Platform. This behavior is dependent on the duration of inactivity within the SAP SuccessFactors Learning Administration application.

If the timeout in SAP SuccessFactors Learning is configured to be 30 minutes, then the administrators stay logged in to SAP SuccessFactors Learning as long as they're logged in to SAP SuccessFactors Platform.

24 SAP SuccessFactors Learning Reference Data

SAP SuccessFactors Learning reference data is the counted data that your administrators see in drop-down lists or pick lists.

SAP SuccessFactors Learning reference data defines lists for administrators and users. For example, reference data creates the list of course types and the list of currencies in your application.

You typically import the data once at the beginning of your implementation and then you review it from time to time to make sure that it still meets your business needs. The initial import is usually a large job, so we provide an import tool inside SAP SuccessFactors Learning: *System Administration* > *Tools* > *Data Import*. When you review your references, or if you just want to tweak your references, you can go to the *References* area of SAP SuccessFactors Learning to edit them in a graphical user interface.

24.1 Importing SAP SuccessFactors Learning References

Import SAP SuccessFactors Learning references so that users and administrators see the correct set of values in their drop-down lists.

Context

You usually import reference data so that users and administrators see the correct set of data in their drop-down menus. For example, your company's employees could be in 10 different countries. When an administrator adds an assignment profile to assign courses to all users in France and Spain (for example), you want France and Spain to appear in the administrator's Country list.

When you import the references, you add all the references in bulk. You usually add in bulk at the beginning of an implementation because you want to import all the data at once. The alternative is to add selections one-by-one through the SAP SuccessFactors Learning administrator environment.

Procedure

1. Open the SAP SuccessFactors Learning Administration environment and go to *System Administration* > *Tools* > *Import Data*.
2. In *Action*, select *Download Template*.
3. In *Record Type*, select *References*.

4. Click *Submit* and then save the template that the system creates for you.
5. For each worksheet in the file, add a row for each entry that you want in your lists.

   For example, if you want administrators and users to pick from among three countries when they see a *Country* list in their applications, then add three rows. If you want to add Canada, The United States, and Mexico, you would add each on a new row in the *Country* worksheet.

   > → Tip
   >
   > Check the comments in the header row for help with the data that goes into the column. For example, the comments tell you the character limits for the cells in the column.

6. When you've completed the worksheets, go back to *System Administration* > *Tools* > *Import Data*.
7. In *Action*, select *Import Data* and in *Record Type* select *References*.
8. In *Import Option*, decide whether you want to add, add and update, or update.

This choice...	...Results in...
Add	If references in your file don't exist in the system, they're added. If a reference in your file already exists in the system, it isn't updated.
Add and Update	If references in your file don't exist in the system, they're added. If references do exist in your system (identified by ID), they're updated.
Update	If references in your file don't exist in the system, they aren't added. If references do exist in your system (identified by ID), they're updated.

9. In *Import File*, click *Browse* to locate your file and upload it.
10. In *Time Zone ID*, select the time zone that needs to be used to date stamp the changes that result from your import.
11. Click *Submit*.

Next Steps

If the job is large, you need to run it as a background job. Follow the on-screen instructions, and return to *System Administration* > *Tools* > *Import Data* after it completes. You can see its status of the job. If the job failed, you can download an error log to help you troubleshoot your worksheets.

24.2 Learning Calendars and Time References

During initial deployment, you set enumerated lists for how your organization wants to manage its calendars and time for Learning. These settings apply to Learning only.

Because your Learning Management System (LMS) calendar usually changes annually, you should review your calendar and times every year after initial deployment. For example, your organization might add new holidays or change the hours of a facility from year to year. By reviewing your calendar and time references periodically, you prevent your organization from scheduling training on a day when offices are closed or a holiday is being observed.

You might also review your date format patterns periodically to help colleagues who have joined from other cultures. For example, if you are a U.S. company opening offices in Europe, you should add a new date format that matches the European standard of day-first instead of month-first.

SAP SuccessFactors Learning Date Format Patterns [page 1294]
View this section if you want to edit or create date periods

Holidays in Learning [page 1294]
Each year, SAP SuccessFactors Learning

Holiday Profiles in Learning [page 1295]
Learning administrators create holiday profiles as a group of holidays that match a particular culture or nationality.

SAP SuccessFactors Learning Time Zones [page 1296]
In SAP SuccessFactors Learning, time zones are critical to completion times and class scheduling.

Work Week Profiles in Learning [page 1298]
Each year, SAP SuccessFactors Learning

24.2.1 SAP SuccessFactors Learning Date Format Patterns

View this section if you want to edit or create date periods

In *References* > *Calendars and Time* > *Date Format Patterns*, you can edit or create new date periods so that users can associate date periods with ad hoc performance reviews, plans, and initiatives. Administrators can select date periods when they create "one time" review processes.

Parent topic: Learning Calendars and Time References [page 1293]

Related Information

Holidays in Learning [page 1294]
Holiday Profiles in Learning [page 1295]
SAP SuccessFactors Learning Time Zones [page 1296]
Work Week Profiles in Learning [page 1298]

24.2.2 Holidays in Learning

Each year, SAP SuccessFactors Learning

Holidays are days when your company's locations are closed. You add holidays to SAP SuccessFactors Learning so that when learning administrators schedule space for a training event, they can see the holidays, see when facilities are closed, and schedule the training at a better time.

Holidays work together with holiday profiles. To understand how they work together, consider two countries like the United States and Canada. Both countries typically close their offices on Christmas and New Years Day. But

the Canadian Thanksgiving holiday is about a month earlier than the U.S. Thanksgiving holiday. You can create a Canadian holiday profile that includes the holidays of Christmas, New Years, and **Canadian** Thanksgiving and you can create a U.S. holiday profile that shares the Christmas and New Years holiday but uses the **U.S.** Thanksgiving holiday instead. This allows you to manage fewer individual holidays while accommodating different cultural holiday schedules.

Each year, when your human resources department publishes the list of holidays, import the next year's holidays, and name them with the year. For example, name holidays NewYearsDay2015 or NewYearsDay2016. Then, at the end of every year, you can go to *References* > *Calendars and Time* > *Holiday Profiles* to update holiday profiles based on the next year's holidays. Technically, you do not need to append the year, but the year helps clarify the holiday in two important ways:

- When your human resources department publishes the holidays mid year, you can tell late-year holidays for this year from late year holidays from last year.
- During implementation time, you are writing holidays for a partial year, so you need to tell the partial-year holidays from the full year holidays.

You can see your holidays in *References* > *Calendars and Time* > *Holidays*.

Parent topic: Learning Calendars and Time References [page 1293]

Related Information

SAP SuccessFactors Learning Date Format Patterns [page 1294]
Holiday Profiles in Learning [page 1295]
SAP SuccessFactors Learning Time Zones [page 1296]
Work Week Profiles in Learning [page 1298]
Holiday Profiles in Learning [page 1295]
Importing SAP SuccessFactors Learning References [page 1292]

24.2.3 Holiday Profiles in Learning

Learning administrators create holiday profiles as a group of holidays that match a particular culture or nationality.

A holiday profile is a group of holidays that match a culture, location, or nationality in your company. For example, you can create holiday profiles for your Irish offices, Egyptian offices, and Japanese offices, each of which observes a different calendar of holidays. You then associate the holiday profiles with a facility. In most cases, you associate (for example) Irish holiday profiles with facilities in Ireland, Egyptian holiday profiles with facilities in Egypt, and so on. A facility in one location can follow the holiday profile of another, but these cases are rare.*Holidays*.

You can see your holiday profiles in the SAP SuccessFactors Learning administration environment in *References* > *Calendars and Time* > *Holiday Profiles*.

Holidays work together with holiday profiles. To understand how they work together, consider two countries like the United States and Canada. Both countries typically close their offices on Christmas and New Years Day. But the Canadian Thanksgiving holiday is about a month earlier than the U.S. Thanksgiving holiday. You can create a

Canadian holiday profile that includes the holidays of Christmas, New Years, and **Canadian** Thanksgiving and you can create a U.S. holiday profile that shares the Christmas and New Years holiday but uses the **U.S.** Thanksgiving holiday instead. This allows you to manage fewer individual holidays while accommodating different cultural holiday schedules.

Work week profiles and holiday profiles together form the hours of operation for your facilities. Work week profiles determine the days of the week that a facility is normally open and holiday profiles contain the exceptions. For example, a facility might normally be open from Monday through Saturday. Those days are set by the facility's work week profile so that learning administrators can schedule training during the facility's work week (in this example, Mondays through Saturdays).

Holiday profiles close the facility days when it is normally open. For example, if New Year's Day is on a Tuesday, Labor Day is on a Monday, and both holidays are in a facility's holiday profile, then the facility that has a work week profile that opens it Monday through Saturday closes to scheduling on New Year's Day Tuesday and on Labor Day Monday.

Parent topic: Learning Calendars and Time References [page 1293]

Related Information

SAP SuccessFactors Learning Date Format Patterns [page 1294]
Holidays in Learning [page 1294]
SAP SuccessFactors Learning Time Zones [page 1296]
Work Week Profiles in Learning [page 1298]

24.2.4 SAP SuccessFactors Learning Time Zones

In SAP SuccessFactors Learning, time zones are critical to completion times and class scheduling.

SAP SuccessFactors Learning uses time zones to show course start and end times in local time: the time **in the location** of learners when attending training. To calculate local time, Learning needs time zones for all applicable parts of the schedule and the user. To help you schedule, you should set the time zones too. For example, you set time zones for the facility where the course takes place, the time zone of the class, and the time zone of the user.

> **Note**
>
> Consider removing the three-letter time zones (like EST or ART) in favor of location-based time zones like America/New York or Africa/Johannesburg.

Manage time zones in *References* > *Calendars and Time* > *Time Zone Management*.

Parent topic: Learning Calendars and Time References [page 1293]

Related Information

SAP SuccessFactors Learning Date Format Patterns [page 1294]
Holidays in Learning [page 1294]
Holiday Profiles in Learning [page 1295]
Work Week Profiles in Learning [page 1298]

24.2.4.1 Enabling SAP SuccessFactors Learning Time Zone Management

Enable SAP SuccessFactors Learning time zone management to control your time zones as if they were any other reference (picklist) in SAP SuccessFactors Learning.

Context

Most SAP SuccessFactors Learning implementations use a subset of all the time zones in the world, but when you first implement, we include all time zones. With time zone management, you can hide unused time zones. By hiding time zones, you expose only those time zones that your users need and they can find their time zones more easily. If, for example, the implementation covers only North America, you can include only North American time zones. Administrators, therefore, select from the few North American time zones when they schedule courses or manage users.

SAP SuccessFactors Learning uses time zones to show course start and end times in local time: the time **in the location** of learners when attending training. To calculate local time, Learning needs time zones for all applicable parts of the schedule and the user. To help you schedule, you should set the time zones too. For example, you set time zones for the facility where the course takes place, the time zone of the class, and the time zone of the user.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Role Management*.
2. Find and open the role that should be able to manage time zones.
3. Open *Permissions*.
4. Add the View Time Zones permission to allow the role to view the time zones but not edit them.
5. Add the Edit Time Zones permission to allow the role to edit the list of time zones.

24.2.4.2 Editing SAP SuccessFactors Learning Time Zones

Edit the list of SAP SuccessFactors Learning time zones to hide unwanted time zones or change the label that administrators see in their picklists.

Context

Most SAP SuccessFactors Learning implementations use a subset of all the time zones in the world, but when you first implement, we include all time zones. With time zone management, you can hide unused time zones. By hiding time zones, you expose only those time zones that your users need and they can find their time zones more easily. If, for example, the implementation covers only North America, you can include only North American time zones. Administrators, therefore, select from the few North American time zones when they schedule courses or manage users.

SAP SuccessFactors Learning uses time zones to show course start and end times in local time: the time **in the location** of learners when attending training. To calculate local time, Learning needs time zones for all applicable parts of the schedule and the user. To help you schedule, you should set the time zones too. For example, you set time zones for the facility where the course takes place, the time zone of the class, and the time zone of the user.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *References* > *Calendars and Time* > *Time Zone Management*.
2. To hide unwanted time zones, clear their *Display* boxes.

   When you hide time zones, they still exist in the system. You are simply removing them from users' picklists.

   When you hide time zones, SAP SuccessFactors Learning checks the following places to see if the time zone is in use. If it is in use, you cannot hide it:
   - Classes
   - Schedule Based Programs
   - User, Instructor, and Administrator Preferences (the time zones of users, instructors, and administrators)
   - Learning Sites, where extended enterprise users can find training
   - Facilities
3. To change the way that a time zone appears to users in their languages, click their *Edit* button.

24.2.5 Work Week Profiles in Learning

Each year, SAP SuccessFactors Learning

Create a work week profile for each type of “normal operating hours” for your facilities. For example, if some of your facilities are open Monday through Friday, others are open Monday through Saturday, and still others are open all

seven day of the week, create three work week profiles. You then associate the matching work week profile with the facility's normal operating hours so that learning administrators can schedule training at those facilities only when they are open.

You set work week profiles in *References* > *Calendars and Time* > *Work Week Profiles*.

Holidays work together with holiday profiles. To understand how they work together, consider two countries like the United States and Canada. Both countries typically close their offices on Christmas and New Years Day. But the Canadian Thanksgiving holiday is about a month earlier than the U.S. Thanksgiving holiday. You can create a Canadian holiday profile that includes the holidays of Christmas, New Years, and **Canadian** Thanksgiving and you can create a U.S. holiday profile that shares the Christmas and New Years holiday but uses the **U.S.** Thanksgiving holiday instead. This allows you to manage fewer individual holidays while accommodating different cultural holiday schedules.

Work week profiles and holiday profiles together form the hours of operation for your facilities. Work week profiles determine the days of the week that a facility is normally open and holiday profiles contain the exceptions. For example, a facility might normally be open from Monday through Saturday. Those days are set by the facility's work week profile so that learning administrators can schedule training during the facility's work week (in this example, Mondays through Saturdays).

Holiday profiles close the facility days when it is normally open. For example, if New Year's Day is on a Tuesday, Labor Day is on a Monday, and both holidays are in a facility's holiday profile, then the facility that has a work week profile that opens it Monday through Saturday closes to scheduling on New Year's Day Tuesday and on Labor Day Monday.

Parent topic: Learning Calendars and Time References [page 1293]

Related Information

SAP SuccessFactors Learning Date Format Patterns [page 1294]
Holidays in Learning [page 1294]
Holiday Profiles in Learning [page 1295]
SAP SuccessFactors Learning Time Zones [page 1296]

24.3 Geography References for Learning

During initial deployment, you set enumerated lists for how your organization wants to manage its geographically distributed workforce. These settings apply to Learning only.

Create the enumerated lists for geography in SAP SuccessFactors Platform and then duplicate them in learning so that when you import users from Platform, the users can have the same locale, currency, and so on.

The set of geographic references you need depends on your organization. For example, if your organization has operations in six countries, you first add the six countries in Platform (or verify that they are enabled), and then you add those six countries in Learning. When users are added to Learning from Platform, the Learning system can recognize their countries and assign them to the right countries. As another example, if you have a set amount of

job locations, set them up in Platform (or verify that they are enabled), and then add them in Learning. When users are added to Learning, Learning recognizes their location.

SAP SuccessFactors Learning Countries [page 1300]
: SAP SuccessFactors Learning countries define the countries that learning users operate in.

Job Locations in Learning [page 1301]
: Learning administrators set job locations so that SAP SuccessFactors Learning can assign courses to the users based on their location.

SAP SuccessFactors Learning Labels [page 1301]
: SAP SuccessFactors Learning uses labels to switch the language in the SAP SuccessFactors Learning.

Locales in SAP SuccessFactors Learning [page 1304]
: A SAP SuccessFactors Learning locale is the language and cultural preferences of one place where you run your business.

SAP SuccessFactors Learning Locale Labels Search [page 1307]
: When searching for locale labels, SAP SuccessFactors Learning offers multiple ways to search for different tasks.

24.3.1 SAP SuccessFactors Learning Countries

SAP SuccessFactors Learning countries define the countries that learning users operate in.

Countries have two main purposes in SAP SuccessFactors Learning. First, they help assignment profiles group users by country so that you can, for example, assign courses to all users in Germany or all users in Mexico. Second, they contain a "Financial Year", which is a way to define accounting years for the training planner. You set day that your company and country uses as the **start** of its financial year, and the system uses this information to calculate DIF Hours (Allocated and Used) for the financial year.

You set countries in *References* > *Geography* > *Countries/Regions*.

Parent topic: Geography References for Learning [page 1299]

Related Information

Job Locations in Learning [page 1301]
SAP SuccessFactors Learning Labels [page 1301]
Locales in SAP SuccessFactors Learning [page 1304]
SAP SuccessFactors Learning Locale Labels Search [page 1307]

24.3.1.1 Important Country Code Setup Information

Please read this important information regarding country code setup in the LMS.

The 3-letter country code setup in the LMS must match the 3-letter country code in the BizX setup to avoid an error when creating a new account using the LMS self-register site.

24.3.2 Job Locations in Learning

Learning administrators set job locations so that SAP SuccessFactors Learning can assign courses to the users based on their location.

In SAP SuccessFactors Learning, job locations are a simple list of places where users work. Job locations are almost always mapped to your Human Resources (HR) system of record. To see your list of job locations as they were imported to SAP SuccessFactors Learning, go to *References* > *Geography* > *Job Locations*.

As a learning administrator, you probably cannot control the list of locations, but your can control the descriptions of the locations. The descriptions help you remember what the job location means when you are working in SAP SuccessFactors Learning. For example, you might not remember what “District 3” means, so you might want to write a description like “Includes Germany, Switzerland, The Netherlands, Luxemburg, and Belgium.” so that you can remember the borders of the location.

To use job locations for assignment in SAP SuccessFactors Learning, consider the laws that govern training. The methods that you use to assign courses as well as the courses you assign, differ by nation, state, and province. For example, the labor law concerning mandatory assignment in Germany differs from the labor law concerning mandatory assignment in the United States, so you might be able to require a course if users' job locations are in the United States, but it might need to be optional if the users' job location is in Germany.

Parent topic: Geography References for Learning [page 1299]

Related Information

SAP SuccessFactors Learning Countries [page 1300]
SAP SuccessFactors Learning Labels [page 1301]
Locales in SAP SuccessFactors Learning [page 1304]
SAP SuccessFactors Learning Locale Labels Search [page 1307]

24.3.3 SAP SuccessFactors Learning Labels

SAP SuccessFactors Learning uses labels to switch the language in the SAP SuccessFactors Learning.

We don’t recommend that you change the label system because we carefully choose the translations. However, if you need to adjust the words that users see on the user interface, you can do so in *References* > *Manage Labels*

Labels. For example, the standard translation of “add” into French is “ajouter”. But if you need to change it to “additionner”, you can do so or if you want to change the English “employee” to “colleague”, you can make that change in SAP SuccessFactors Learning labels.

> **Note**
>
> SAP SuccessFactors Learning labels have a limit of 10,000 bytes. The limit is in bytes, not in characters, because some UTF-8 characters are more than one byte.

If you need to update labels in batch, we recommend that you use the label import/export wizard.

Parent topic: Geography References for Learning [page 1299]

Related Information

SAP SuccessFactors Learning Countries [page 1300]
Job Locations in Learning [page 1301]
Locales in SAP SuccessFactors Learning [page 1304]
SAP SuccessFactors Learning Locale Labels Search [page 1307]
Label Import/Export [page 1279]
Locales in SAP SuccessFactors Learning [page 1304]
SAP SuccessFactors Learning Locale Labels Search [page 1307]

24.3.3.1 SAP SuccessFactors Learning Labels Fields

SAP SuccessFactors Learning controls how text strings appear on administrator and user interface pages with these fields.

Go to *References* > *Manage Labels* > *Labels* to investigate and modify the label value for any of the locales.

Label Fields

This Field...	...Is Used as Follows
Label Type	The label type indicates how the label is used. For example, the word “Add” can be used for a button or for a breadcrumb.
Use by	Increasingly, labels are used in both the administrator environment or the user environment. Some old labels, however, might be used in either one or the other environment. This can be useful for troubleshooting: if your label isn’t appearing in the user environment, check to see if it’s an admin-only label.
Active Locale ID	The unique ID of the locale (language) that the word or phrase is translated into. If you don’t see a locale, contact customer support to have it licensed and installed.

This Field...	...Is Used as Follows
Label Value	The translation of the word or phrase into the local language.

Related Information

Finding SAP SuccessFactors Learning Label Types [page 1303]

24.3.3.2 Finding SAP SuccessFactors Learning Label Types

Find the SAP SuccessFactors Learning label types for your installation so that you understand the categories of user interface text.

Context

If you're troubleshooting or adding new text to SAP SuccessFactors Learning pages, you often want to know how the text is used. For example, you might translate the word "Add" differently if it is on a button or in a bread crumb path. The type tells you the difference: you see a label for "Add" of type BUTTON and a label for "Add" of type BREADCRUMB.

You might want to look up all the available types that are on your system and you might want to see a description. You might want to know what, for example, BREADCRUMB means. You can look up the types and see the description by running a filter.

Procedure

1. Log in to SAP SuccessFactors Learning administration and go to *References* > *Manage Labels*.
2. Click *Add/Remove Criteria* and make sure that *Label Type ID* is selected.
3. In *Label Type ID*, click the filter button.
4. In *Label Types Filter For Labels*, click *Search*.

Results

You see a list of all label types and a description of the label type.

24.3.4 Locales in SAP SuccessFactors Learning

A SAP SuccessFactors Learning locale is the language and cultural preferences of one place where you run your business.

A locale is the cultural traditions of one place where you run your business. In general, locales are grouped by language and nation, such as French speakers in Canada, Spanish speakers in Mexico, English speakers in the United States, Spanish speakers in Spain, and English speakers in Canada. The combination of language and nation allows you to not only set a language dialect for a place (such as Quebec in Canada) but also match the places' customs for how they write time, currency, or decimals.

When the system displays labels, first it looks at the current administrator's preferred locale. If no value is found then it looks for values in the system default locale. If no value is found, then the system uses the English locale.

Parent topic: Geography References for Learning [page 1299]

Related Information

SAP SuccessFactors Learning Countries [page 1300]
Job Locations in Learning [page 1301]
SAP SuccessFactors Learning Labels [page 1301]
SAP SuccessFactors Learning Locale Labels Search [page 1307]
Activating Learning Currencies [page 834]

24.3.4.1 SAP SuccessFactors Learning Locales Summary

In *References* > *Manage Labels* > *Locales* > *Summary tab* >, you can use these fields to control basic behavior of a SAP SuccessFactors Learning locale.

Locale Summary Fields

This Field...	...is Used as Follows
Active Locale ID	This is the ID define during creation of a new locale.
Internal Locale ID	This is the ID that is used for Data Import, Connector, and API. This cannot be changed.
Display Locale ID	This is the displayed value across the application which allows flexibility rather than the system defined ID.
Description	You can rewrite the description if you need a better description for other learning administrators.
Use By	Some locales are built for the user environment, some for the administration environment, and some for both. If you change it to the wrong type, you could cause translated strings to disappear from users' and administrators' screens.

This Field...	...is Used as Follows
Default	Select to make this locale the default one for the administration environment. Before you select it make sure your locale is used by either Admin or Both.
Language	The language used in the locale.
Country/Region	The Country or Region for the locale.
Currency ID	We do not recommend that you change the currency ID because it has been set for the country of the locale. You might need to change the currency, for example, if users in one country purchase learning in a separate currency, but this situation would be rare.

Related Information

Activating Learning Currencies [page 834]

24.3.4.2 SAP SuccessFactors Learning Time and Number Patterns in Locales

SAP SuccessFactors Learning time and number patterns define, for each locale, how users experience currency numbers, percentages, dates, and so on.

Time and number patterns control how users in a locale experience time, dates, percentages, and so on. For example, users in Germany, you might set a date format of yyyy-MM-dd but in the United States, you might use a date format of MM/dd/yyyy. If your users have a deadline of January 5, 2016, the users in Germany (associated with the German locale) see 2016-01-05, but users in the United States (associated with the U.S. English locale) see 01/05/2016. Number patterns work similarly: some locales use a comma for their decimal marker, for example, but some use a period, so you can control how users in different locales experience ten and one-tenth: either “10.1” or “10,1”.

Because we install your locales with the standard time and number patterns for the locale, most customers can just use the default. However, if you need to adjust them for your business case, you can do so in the SAP SuccessFactors Learning Administration environment, in *References* > *Manage Labels* > *Locales*. We also install with the most common time and number format patterns, but if you don’t find the pattern you need, go to either:

- *References* > *Calendars and Time* > *Date Format Patterns* to add patterns for time or date.
- *References* > *System Administration* > *Number Format Patterns* to add patterns for integers, decimals, currencies, and percentages.

Date Pattern Formatting Guidelines

When creating custom date patterns, follow these capitalization rules:

- **yyyy**: Four-digit year (lowercase)
- **MM**: Two-digit month (uppercase)
- **dd**: Two-digit day (lowercase)

Valid date pattern examples:

- yyyy-MM-dd
- MM/dd/yyyy
- dd.MM.yyyy

Related Information

Adding Learning Date Format Patterns [page 591]
Adding Learning Number Format Patterns [page 592]

24.3.4.3 Viewing all Labels in a SAP SuccessFactors Learning Locale

View all the labels in a specific SAP SuccessFactors Learning locale so that you can see all the labels in your locales, their current values, and how those values have changed from the original. When the system displays labels, first it looks at the current administrator's preferred locale. If no value is found then it looks for values in the system default locale. If no value is found, then the system uses the English locale.

Procedure

1. Log in to SAP SuccessFactors Learning and then go to *References* > *Geography* > *Locales*.
2. Find and open the locale that you are interested in.
3. Go to *Labels*.
4. To filter the list of labels by a specific type, click *Filter By*.
5. To view all changes in your labels, click *View Label Changes*.

24.3.4.4 Editing Hints to Help SAP SuccessFactors Learning Users with Date, Time, and Number Patterns

Add hints to help SAP SuccessFactors Learning users with date, time, and number patterns so that they understand the format for their locale (culture).

Context

Although the system provides default hint messages for each date, time, and number pattern, you can edit them per locale. You might consider editing the hints when you allow users to choose their own patterns in *Options and Settings* and when those patterns have a specific purpose. For example, you might want to give users a choice between a twelve hour and twenty-four hour time pattern. By default, the hints are "HHmm" and "HHmm (AM/PM)", but you might think that those patterns are too hard to understand for users. So you might change them to "24-Hour" and "12-Hour".

Hints are specific to a locale because the words in the hint should be translated. For example, you might say "12-Hour" in the US English locale but "12-Horas" in Mexican Spanish. The default hints use standard Java notation so they work reasonably well across locales. If you decide to change the hint, you change it for each locale.

Procedure

1. Log in to SAP SuccessFactors Learning administration and then go to *References* > *Manage Labels* > *Locales*.
2. Look up the locale that should get the hints and open it.
3. Go to *Date Patterns* tab, type the hint in the *Update the Date Patterns for the Active Locale* table, and then click *Apply Changes*.

Related Information

Adding Learning Date Format Patterns [page 591]
SAP SuccessFactors Learning Time and Number Patterns in Locales [page 1305]
Adding Learning Number Format Patterns [page 592]

24.3.5 SAP SuccessFactors Learning Locale Labels Search

When searching for locale labels, SAP SuccessFactors Learning offers multiple ways to search for different tasks.

- Go to *References* > *Manage Labels* > *Locale Labels* for the most powerful way to find all strings and export them to an Excel spreadsheet for offline handling. For example, if you wanted to see all French Canadian and

all English Canadian translations at once, and export them to see how your Canadian users experience the strings, you can use this search.

- Go to *References* > *Manage Labels* > *Labels* to look up individual string variables and edit the translations for a single string. For example, if your Arabic users don't like the translation of "Add" when used on a button, you can go here to make that individual change.
- Go to *References* > *Manage Labels* > *Locales* > *Labels* to look up all labels for a single locale and see how they've changed. For example, if you know that you made some changes from the original labels for Arabic, you can go here and see a report of all changes.
- Go to *References* > *Manage Labels* > *Label Import/Export* to export the strings in batch and import them again under a different translation. For example, if you decided to change many strings for a particular locale by sending them to a translator, you can use this tool.

Parent topic: Geography References for Learning [page 1299]

Related Information

SAP SuccessFactors Learning Countries [page 1300]
Job Locations in Learning [page 1301]
SAP SuccessFactors Learning Labels [page 1301]
Locales in SAP SuccessFactors Learning [page 1304]
SAP SuccessFactors Learning Labels [page 1301]
Label Import/Export [page 1279]
Viewing all Labels in a SAP SuccessFactors Learning Locale [page 1306]

24.4 Learning References

During initial deployment, you configure learning references to define how your organization wants to help users find, complete, and earn credit for their courses.

Learning references are your unique learning system, so they are the most important enumerated values in SAP SuccessFactors Learning. They define how SAP SuccessFactors operates as a Learning Management System (LMS).

For example, learning references define how your LMS credit system works, in both small and large ways. It defines what scores users need to receive credit and also what you call passing in different situations: when a student passes a course and earns credit, another organization might want users to see "Passed for Credit" but you might want to call it "Credit Granted". Those values are defined as enumerated lists in learning references.

SAP SuccessFactors Learning Resource Blocks [page 1309]
A resource block type identifies why a SAP SuccessFactors Learning resource cannot be scheduled.

24.4.1 SAP SuccessFactors Learning Resource Blocks

A resource block type identifies why a SAP SuccessFactors Learning resource cannot be scheduled.

While setting up a training calendar, you have times that resources cannot be available. For example, an instructor can be on leave and therefore cannot be scheduled to teach a class. Or, a training facility might be undergoing cleaning or renovation and cannot be used. In both of these cases, a schedule block prevents the resource from being used. You create a set of schedule block types in *References* > *Learning Activities* > *Resource Blocks* to describe why a resource is not available.

For example, if you are using Employee Central, you can configure Intelligent Services to post an event to SAP SuccessFactors Learning when an employee goes on leave. If that employee is an instructor, SAP SuccessFactors Learning creates a resource block to prevent the instructor from teaching during his or her leave. You want might create a resource block type of "On Leave" to describe why the instructor cannot be scheduled to teach a course.

We recommend that you keep resource block types to a minimum so that your system does not become complicated. Create types that are important to your business reporting and add a good description so that others understand the impact of their selection.

Parent topic: Learning References [page 1308]

24.5 Categorization for Competencies in Learning

When you import competencies from SAP SuccessFactors Platform to SAP SuccessFactors Learning, you insert them into categories, sources, and types to create an orderly system for your organization. The categorization is unique to Learning.

You do **not** create or manage competencies in SAP SuccessFactors Learning. Instead, you import them from SAP SuccessFactors Platform. When you import them into Learning, you should categorize them in a way that makes sense for your organization. When you add competency categories, sources or types, you're declaring the categories that make sense for your organization.

Your list of categories, your list of sources, and your list of types are technically scoped to Learning only, but you should create them with an understanding of how you use competencies more globally:

- Technically, your competency categorization system is **not** reflected back to platform and you do **not** find them in other parts of SAP SuccessFactors if you add them in Learning only.
- Functionally, your Learning categorization should reflect how you organize your competencies in other parts of SAP SuccessFactors so that your learning administrators have a seamless experience.

> ⓘ Note
>
> Don't create competencies in Learning. Instead, import them from Job Profile Builder.

Competency Category

Competency categories are the most general, least defined categorization for competencies. Select categories that make sense for your organization: categories that you want to search for when looking for competencies.

Competency Sources

Competency sources describe how the competency entered your organization. For example, competency sources can be as simple as **internal** or **external** or as complex as the regulation code that requires the competency.

Competency Type

Competency types describe the taxonomy of the competency model you use. For example, you might type competencies as core to your organization, specific to a job within the organization, or to any team (for example, leadership qualities). If you typed competencies in this way, you can create types of **Core Organizational**, **Functional Job**, and **General Employment**.

24.6 Learning System Administration References

During initial deployment, you set enumerated lists for how your organization wants to manage its system administration. These settings apply to Learning only.

A system administration reference manages some part of the overall system. For example, approval processes are used throughout the system from requests to enroll into training to requests for a new account. As a second example, number format patterns control how all users in the system see decimals, percentages, and currency.

SAP SuccessFactors Learning Report Groups Fields [page 1310]
Add or change SAP SuccessFactors Learning report group fields when you create reports that make the same query and return the same results, but group those results differently (when their `group by` clauses differ).

24.6.1 SAP SuccessFactors Learning Report Groups Fields

Add or change SAP SuccessFactors Learning report group fields when you create reports that make the same query and return the same results, but group those results differently (when their `group by` clauses differ).

Manage report group fields in SAP SuccessFactors Learning administration by going to *References* > *System Administration* > *Report Groups*.

> ⚠ Caution
>
> Although you can use report groups to group any kind of reports, even those that return totally different data, we do **not** recommend that approach because the search experience, browse experience, and overall report design expect a strict interpretation of report groups. They expect that you are using them to group together similar reports with different `group by` clauses.

Report groups apply if you are using SAP SuccessFactors Learning reports. If you are using, for example, Online Report Designer, then report groups do **not** apply to you.

This Field...	...Is used as follows
Report Group ID	The unique ID of the report group. Report groups are reports that run the same query but whose results are grouped differently..
Label	The label ID of the I18N label that the system creates for you when you add a report group. You can manage the label like any other label in the Locale Labels section.
Name	The label value in the default locale. You can add values for different locales in the Locale Labels section.
Report Category	The category of the group. When users browse for reports, they can browse by category. A report group appears in the Reports section when a user selects its category.
Description	A description of the group. Descriptions are visible to users who have access to creating, modifying, and viewing report groups.

Parent topic: Learning System Administration References [page 1310]

Related Information

SAP SuccessFactors Learning Locale Labels Search [page 1307]
Translating Strings in Learning [page 1350]

24.7 SAP SuccessFactors Learning User Management References

SAP SuccessFactors Learning User management references are enumerated lists (picklists) for user attributes.

User management references provide enumerated lists for user attributes. For example, you can set a list of scholastic degree types to associate with users. When administrators update the degree of users, they select from a list of degrees in *References* > *Users*.

For SAP SuccessFactors Learning, user management references are most useful when creating assignment profiles. Assignment profiles pool users by their attributes so that you can assign courses to the pool of users. User management references give you a way to create that pool (all temporary employees, for example, or all users with a degree type).

The values in Learning Administration *References* should always match those in SAP SuccessFactors Platform because Platform is the system of record. User Connector - SF adds most references that matter to Learning assignments.

Why Avoid Learning Job Grade Metadata [page 1312]

Job grades are metadata that was used by Plateau Compensation or Plateau Performance. You cannot assign courses based on job grades and most customers do not use Learning job codes. Of customers using Learning job codes, most don't need job grades to find their job codes.

24.7.1 Why Avoid Learning Job Grade Metadata

Job grades are metadata that was used by Plateau Compensation or Plateau Performance. You cannot assign courses based on job grades and most customers do not use Learning job codes. Of customers using Learning job codes, most don't need job grades to find their job codes.

> **Note**
>
> Job grades are a part of Plateau legacy compensation and performance products, which are in their retirement process.

In most cases, you should allow this data to load from the connector. Ideally, you use job code and position to define jobs for purposes of promotion and compensation. However, using job code and position isn't possible for some organizations, in which case, job grades become a more important tool in compensation, workforce planning, and succession planning. You can create a system where job grades, job codes, and positions work together.

Parent topic: SAP SuccessFactors Learning User Management References [page 1312]

25 SAP SuccessFactors Learning Reports

SAP SuccessFactors Learning reports run entirely within the Learning application and against Learning data (not other parts of SAP SuccessFactors).

Most customers use default Learning reports for simple queries of their learning data. If you want a total SAP SuccessFactors view of your organization, please use Online Report Designer.

For enabling Storiesin People Analytics for customers who purchase, or set up SAP SuccessFactors Learning after enabling People Analytics in their SAP SuccessFactors instance, you must run the upgrade job from Provisioning by going to <Customer Instance> *Manage Scheduled Jobs*, selecting job type as **Configuration Job for Stories in People Analytics**, and running **UpgradeCenter EmbeddedAnalyticsConfigJob**.

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

25.1 Running Reports in Learning

Run Learning reports when you want to get data from Learning.

Context

The value of the maximum time for reports to run has been fixed at 24 hours, and that of the maximum storage size for reports has been fixed at 5 GB in the system. These limits are set to a higher value to prevent any interruption in business, and they don't impact any recurring reports as per current analysis.

> ⓘ Note
>
> Learning reports are unique in SAP SuccessFactors. They don't pull data from other modules. If you want to run a report that gets data from outside Learning, use the suite-wide reporting tools. PRD doesn't provide backup, and file recovery capabilities that data extraction tools do. Avoid using PRD as a substitute for such tools, as it can cause timeout issues, or partial file extracts.

> → Remember
>
> Reports generated using Plateau Designer Report (PRD) aren't recommended to be used in place of integration or data extraction tools that SAP SuccessFactors offers. PRD doesn't provide backup, or file recovery capabilities that data extraction tools do. Avoid using PRD as a substitute for such tools, as it can cause timeout issues, or partial file extracts.
>
> SAP recommends you to use filters while running reports that produce large data, or have a long runtime.

Procedure

1. Find the report you want to run.

   You can use the search facility or you can browse the reports. Read the report descriptions to determine if it's the right report for you.
2. If the report is a member of a report group, expand the group.

   Report groups are reports that run the same query but whose results are grouped differently. Look for the report that groups its results as you want to see them.
3. Select the title of the report that you want to run.

   The report form opens so that you can change the details of the report, including its format and the data that it includes.
4. Change the layout of the report with titles, page breaks, headers, and footers.

   Not all reports have the same layout options.
5. Select the information that you want the report to return by using the filters in the report form.

   > **Note**
   >
   > - You can use wild card characters in your searches (_ for single character and **%** for multiple characters). To use these wild card characters, set the `enableSingleCharacterWildCard` and `enableMultipleCharacterWildCard` properties to **`true`** respectively. For more information about configuring the properties, refer the **Related Information** section.
   > - Unless otherwise stated, fields that filter by date will return data in the time zone of the user who generates the report. For example, if a user in India Standard Time generates a report with a *Required Date From* of May 25, 2022 and a *Required Date To* of May 31, 2022, the report will contain records with required dates between May 25, 2022 12:00:00 AM IST and May 31, 2022 11:59:59 PM IST.
6. Select *Mask User IDs* to mask user IDs for data privacy.
7. In *Report Destination*, select how you want to receive the report data.
   - Select *Browser* to view the report on a web browser.
   - Select *Local File* to save the report to your computer.

   > **Note**
   >
   > CSV reports can only be saved as a local file.
8. In *Report Format*, select the file format of the report.

   Different formats offer different advantages. PDF reports, for example, are useful for presentations and CSV (delimited) reports are useful for pulling data out of Learning so that you can analyze it in a tool like Microsoft Excel.

   Although the format **CSV** is the initials of Comma-Separated Values, you can choose your own delimiter.
9. Run the report.
   - Select *Run Report* to run the report immediately.
   - Select *Save Report* to save the report.
   - Select *Schedule* to schedule the report to run later.

Related Information

SEARCH System Properties

25.2 Scheduling SAP SuccessFactors Learning Reports

Schedule a report when you expect it to contain a large amount of data or when you want to run it periodically to get the latest information.

Context

You can choose to zip the scheduled report's output to reduce the size of the report during email or SFTP delivery.

- For emailed reports, the configuration is set as `enableZippedReportNotification=true` by default. This helps ensure that the output size is less than typical email server restrictions and saves valuable space. If any report output attachment is larger than the allowable email server size (18 MB), the recipient receives email notification that the size exceeded the allowable limit. The report can be retrieved in the report jobs tab of the originating user.
- For SFTP delivery, the configuration is set as `enableZippedReportOutputForSFTP=false` by default. SAP recommends this be set to `true` when possible. There are no size limits on SFTP file delivery. You can open the zip file without needing any special extraction software.

You can change these configurations in *System Administration* > *Configuration* > *System Configuration* > *REPORT_SYSTEM*.

Procedure

1. Go to *Learning Administration* > *Reports*.
2. Find and open the report that you want to run.
3. Configure the report as if you were running it immediately.

   For example, add the report title, header and footer (for PDF reports) and limit the report to a set of users or a set of courses.
4. **Optional:** Create a filter to narrow your search using the filter icon. In the filter window, find the category values that you want to include in the report result.

   > **Note**
   >
   > You can use wild card characters in your searches (_ for single character and **%** for multiple characters). To use these wild card characters, set the `enableSingleCharacterWildCard` and `enableMultipleCharacterWildCard` properties to **`true`** respectively. For more information about configuring the properties, refer the **Related Information** section.

5. Choose *Schedule Job*.

   The *Schedule Background Job* form opens.
6. Decide how you want to schedule the job.
   - To run the job once, select *Schedule this job to be executed on* and then select one of the available time frames. You typically run jobs once when it is a big job and you want to run it in the background but you don't need periodic updates on the data.
   - To run the job periodically, select *Schedule this job to recur as follows* and then set up the interval that the job should run. You typically run jobs periodically when you have a weekly or monthly report that you are responsible for: it's the same report run the same way, but you want to see the data every week or every month.
7. To receive an email with the report, select *Notify via email upon completion*, type your email address in *Email*, and then select *Email the report*.
8. Click *Finish*.

Next Steps

Go to *Report Jobs* to view the job, edit the schedule, download the results, email the results, or delete the job.

Related Information

SEARCH System Properties [page 1213]

25.3 Configuring SFTP Learning Reports

Configure SFTP settings with SAP SuccessFactors Learning Administration to send reports directly to an SFTP server.

Procedure

1. From SAP SuccessFactors Learning Administration, navigate to *System Administration* > *Configuration* > *System Configuration* and then edit *REPORT_SYSTEM*.
2. Find the following section within the configuration and update each setting as appropriate:

```
#This section is used for configuring an FTP server to receive report output
#In environments where access to root level directory is denied, path can be
configured as relative path
#Relative path should be in the format - <directory in user home directory>/<sub
directory>/<sub directory> where <sub directory> are optional
remoteFtpEnabled=true
```

```
defaultReportFtpConfig.protocol=sftp
defaultReportFtpConfig.server=ftpupload.plateau.com
defaultReportFtpConfig.port=22
defaultReportFtpConfig.path=/
defaultReportFtpConfig.userID=
defaultReportFtpConfig.password=
```

Be sure `remoteFtpEnabled` is set to `true`. Your SFTP URL goes in the `defaultReportFtpConfig.server=ftpupload.plateau.com` configuration formatted as follows: `sftp8.sapsf.com`. *Don't* include https.

3. Choose *Apply Changes*.

Next Steps

Follow Running Reports in Learning and select *Remote File* as the *Report Destination* to send the report to the SFTP.

Related Information

Sending Learning Reports to a Specific SFTP Server [page 1317]

25.4 Sending Learning Reports to a Specific SFTP Server

You can define a specific SFTP server location as the report destination for individual reports in SAP SuccessFactors Learning.

Prerequisites

In the *REPORT_SYSTEM* configuration, `remoteFtpEnabled` is set to `true` (*System Administration* > *Configuration* > *System Configuration* > *REPORT_SYSTEM*).

Context

If you have multiple reports to send to different SFTP destinations, you need a different set of configuration for each report definition. One set is already included in the existing configuration, and any additional sets need to be copied and pasted into the configuration with the appropriate `ReportName` filled in.

Procedure

1. From SAP SuccessFactors Learning Administration, navigate to *Reports*.
2. Find and select the report you want to configure by choosing the *Export* icon.
3. On the *Report Export* page, copy the file name.
4. Navigate to *System Administration* > *Configuration* > *System Configuration* and then edit *REPORT_SYSTEM*.
5. Find the following section within the configuration and replace `ReportName` in each setting with the file name you copied in Step 3:

```
#For a specific report, add
#reportFtpConfig.ReportName.protocol=
#reportFtpConfig.ReportName.server=
#reportFtpConfig.ReportName.port=
#reportFtpConfig.ReportName.path=
#reportFtpConfig.ReportName.userID=
#reportFtpConfig.ReportName.password=
#reportFtpConfig.ReportName.timeout=
#reportFtpConfig.ReportName.enablePassiveMode
```

6. Update each setting as appropriate and remove the # prefix for each.
7. Choose *Apply Changes*.

Related Information

Running Reports in Learning
Configuring SFTP Learning Reports [page 1316]

25.5 Downloading Learning Report Designer

Download Learning Report Designer to create custom reports with Learning data.

Prerequisites

To run the installer, you need a 32-bit Java Runtime Environment (JRE).

Context

If you have the proper role permissions access to create custom reports, you can directly download Learning Report Designer *Reports* in SAP SuccessFactors Learning. The download page also contains the configuration information that you need to connect the client to your Learning server.

Procedure

1. Go to SAP SuccessFactors Learning Administration in your staging environment, and then go to *Reports* > *Reports tab* > *Learning Report Designer*.

   > **Note**
   >
   > You cannot download report designer from a production environment and you cannot **build** reports against a production environment. You must first build the reports against staging, test them, and then import them to **run** in production.

2. Click *Export Report Library* and leave the browser page open.

   Leave the browser page open because you need the information on the page in later steps.

   The report designer installation wizard downloads to your workstation.

3. Run the installer that you downloaded.

   When the installer finishes, you have the latest copy of Report Designer on your workstation, but you have not yet connected it to SAP SuccessFactors Learning.

4. Start the Report Designer client that you just installed.
5. In Report Designer, open *Data Source*.
6. Use the information in the open browser (*Reports* > *Reports tab* > *Learning Report Designer*) to fill the *Data Source* form and connect to SAP SuccessFactors Learning.

25.6 Importing Reports

View this section if you want to know how to import reports.

Context

If you're a member of a role that has the Import/Export Reports permission, then you can import and export custom reports. If you go to Reports and you see the Import link, then you can import and export reports.

Before you begin, see the Communication Checklist with Report Writers. The report writer should provide you with information included in the checklist.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Reports*.
2. Choose the *Reports* tab.

3. Choose a report and click the *Import* link.
4. In the *File* box, type the full path to the .zip file that the report writer gave you. You can click the *Browse* button to find it.
5. Click *Submit*.
6. In the Report Import page, make the following choices in collaboration with the report writer.
    - *Target User:* Select the user groups who will run the report. For example, if you select Managers, users who are managers see the report in the end-user interface.
    - *Group:* The Report Group to which this report belongs. Although you can use report groups to group together any reports, we recommend that you restrict groups to reports that have the same queries and results, but that return those results with different GROUP BY clauses. In other words, the same reports, grouping their results differently. We recommend this because the search, browse, and future functionality are all built with a strict interpretation of report group.
    - *Security:* The permission to run the custom report is controlled by security settings (the Run Report permission, security domains, and roles). Roles have types and you need to select the role type here. In general, if your target users are Users, Managers, or Organization Owners, then select User. If your target users are Administrators, then select Admin.
    - *Import Summary:* The import summary table contains the contents of the .zip file that you're importing. The Existing File Information column and Published column are important to your decision making. For example, you might be importing a custom report multiple times, to test or update the file. In this case, check the Existing File Information column to see if a copy of the file exists already and when it was last updated. Also, check the Published column to see if you're updating a report that has been published to your target users or if you're updating a report that has remained unpublished. If the report is published, you should consider how you'll distribute this new version to your target users.
    - *Overwrite:* If a file already exists in the system, you're prompted to overwrite it. If your report writer is updating report formats or the look and feel of a report, then most likely you'll overwrite the report file. There are other cases where you're prompted to either overwrite an existing library in the system or keep your current library. To resolve these issues, communicate with the report writer. If they've changed the library, and the new report requires the change, then you must overwrite your current library. However, other reports might also depend on the library, so before you publish a report, collaborate with the report writer to test your reports and other reports in the system.
7. Click *Import*.

    Next Steps:
    - Import any labels that the report writer changed. See Label Import/Export Wizard.
    - Run the unpublished report to test it. To run unpublished reports, your role must have access to the Run Unpublished Reports permission. See Running a Report.
    - Edit the attributes of the report as necessary for your situation. See Editing Report Details.
    - Publish the report. After you publish it, any target user in a role that has access to the Run Report permission can run it. See Publishing a Report.

Related Information

Communication Checklist with Report Writers [page 1335]
Label Import/Export [page 1279]
Publishing a Report [page 1326]

Running Reports in Learning [page 1313]
Editing Report Details [page 1330]

25.7 Auditing Changes Made to User Personal Information in SAP SuccessFactors Learning

Audit changes to user personal information to see each change made to individual users and who made those changes to the data.

Context

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

> **Note**
>
> You run *User Personal Information Changes* 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 Change*.

   > **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. Locate the field that corresponds to the type of user whose personal information you want to report.
   - If you want to report changes to the personal information of a learner, select the user's ID in *User*.
   - If you want to report changes to the personal information of an administrator, select the administrator's ID in *Admin ID*.
   - If you want to report changes to the personal information of an instructor, select the instructor's ID in *Instructor*.
5. In *Report Subject*, select *Changes to the user*.
6. In *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 commerce features, you also see any changes made to this user for Commerce issues.
Learning Assignments	Learning assignments include changes to what courses a user is assigned.
Learning History	Learning history includes changes to the learning completions: courses that users have finished.

7. Set a date range for the report and then click *Schedule Job*.

25.8 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*.

25.9 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*.

25.10 Exporting Reports

View this section if you want to know how to export reports.

Context

If you're a member of a role that has the Import/Export Reports permission, then you can import and export custom reports. If you go to Reports and you see the Import link, then you can import and export reports.

Procedure

1. Go to *Reports* and find the report you want to export. If the report is a member of a report group, expand the group. Report groups are reports that run the same query but whose results are grouped differently.
2. Click the *Edit*  icon for the report.
3. Click the *Export* button.
4. Type a file name in the *File* box, and then click *Export*. The file name can't contain any special characters.
5. Click the *The exported file can be downloaded here* link. The file downloads through your browser.

   Next Steps:

   - Save the .zip file as a backup of the current report state. You might back up reports, for example, if the report writer sent you a new version of the report.
   - Send the exported .zip file to a report writer for changes. Before doing so, ensure that you read Communication with Report Writers.
   - If the report writer edits the report in the .zip file and sends it back to you, you reimport it into the system.

Related Information

Communication Checklist with Report Writers [page 1335]

25.11 Exporting Report Libraries

View this section if you want to know how to export report libraries.

Context

You export report libraries to use them in Plateau Report Designer. Plateau Report Designer is a client application that creates new reports or customizes existing reports that you run in the Reports section. You export libraries from SAP SuccessFactors Learning Administration to Plateau Report Designer because SAP SuccessFactors Learning Administration is the system of record for the libraries.

The first time you install or update Plateau Report Designer, you must export libraries to your Plateau Report Designer workspace.

To export libraries:

Procedure

1. Go to the Reports tab in the Reports section.
2. Click the *Export Library* link.
3. Select the libraries you want to export. Libraries are separated for functional reasons: to help you manage the different libraries in the system.
4. Type a file name for the .zip file that will contain the libraries. This name is for download purposes only. The libraries will have their proper names and will be packaged inside the .zip file.
5. Click *Export* and then click the link to download the .zip file.

Related Information

SAP SuccessFactors Learning Reports [page 1313]

25.12 Publishing a Report

View this section if you want to know how to publish a report.

Context

Reports can be published or unpublished:

- Published: Published reports are available to any target user who has access to the security domain of the report and who has the Run Report permission.
- Unpublished: Unpublished reports are available to users who have access to the Run Unpublished Report permission.

When you import a report for the first time, it is in the unpublished state. While it is in the unpublished state, you should test it to ensure that it works as expected. If possible, you should also ask the report writer to test the report. After you're satisfied that the report is working, you can publish it, as follows:

Procedure

1. Log in to SAP SuccessFactors Learning Administration. You must have the Edit Custom Report permission. See Report Permissions.
2. Go to *Reports*, find the report that you want to publish and click its title.
3. Select the *Published* check box, and then click *Save*.
4. Log in as a user with the Run [report title] Report permission and with access to the report's security domain.
5. Locate the report and test it to ensure it was published correctly.

Related Information

Report Permissions [page 1333]

25.13 Version Up a Published Report

View this section if you want to know about versioning up a published report.

When importing a new, updated report within the LMS Report Designer, administrators now have the option to version up the published report and prevent overwriting of an existing report with the same name. This allows the administrator to maintain existing versions of the report.

25.14 Basic Report Tasks

View this section if you want to know about basic report tasks.

Most administrators access the Reports section to report on system information. A select few administrators also have access to report administration tasks to change descriptions, categories, or even delete reports from the Reports tab. But most administrators perform the following tasks:

- Running a Report
- Scheduling a Report
- Saving a Report

If you are an administrator who is in charge of managing the reports, see Advanced Report Tasks.

25.15 Advanced Report Tasks

View this section if you want to know about advanced report tasks.

Although most administrators need access to only Basic Report Tasks, some administrators manage the reports themselves. If you are one of those administrators, you might have access to one or more of these tasks:

- Downloading Learning Report Designer
- Importing Reports
- Exporting Reports
- Exporting Report Libraries
- Editing Report Details
- Publishing a Report
- Editing Report Definitions and Configuration
- Unpublishing a Report
- Deleting a Report

25.16 Reports Tab

View this section if you want to know about the Reports tab.

Reports > *Reports tab*, the most common use of the Reports tab is to run a report. After you search or browse to it, click its title, which appears as a link. Then, follow the instructions in Run Report Page.

Depending on your security privileges, you can also perform advanced report tasks from the Reports tab.

Why You Cannot Run the Performance Review Template Report

The performance review template appears in the Reports section of the application but you cannot run it. You can only export it from the *Report Details* dialog box. You cannot run it because it is not a standard report. Instead, it is the template that controls the layout of a printed performance review in the end user interface.

Why You Cannot Run the Certificate of Completion Reports

The certificate of completion reports appear in the Reports section of the application but you cannot run it. You can only export it from the *Report Details* dialog box. You cannot run it because it is not a standard report. Instead, it is the template that controls the layout of printed certificates of completion, which appear at the end of the learning event recorder wizard.

Related Information

Run Report Page [page 1328]
Advanced Report Tasks [page 1327]
Editing Report Details [page 1330]
Add Learning History with Finance [page 239]

25.17 Run Report Page

View this section if you want to know about the Run Report page.

On the Run Report page, you enter the report parameters to:

- Run the report
- Schedule a report
- Save a report

25.18 Report Jobs Tab

View this section if you want to know about the Report Jobs tab.

In *Reports* > *Report Jobs* tab, the Background Jobs tab lists the current background report jobs, which are automatically run in the background. You create jobs when you schedule the report to occur on a recurring basis.

In this tab, you can delete report jobs or edit their schedule. Report jobs that are scheduled to run once in the background appear in the Background Jobs section of System Administration.

25.19 Saving a Report

View this section if you want to know about saving a report.

To save a report, click *Save Report* on the Run Report page. When you save a report, you save the report parameters you enter in the Run Report page. Saved reports are stored on the Saved Reports tab.

Related Information

Saved Reports Tab [page 1329]

25.20 Saved Reports Tab

View this section if you want to know about the Saved Reports tab.

In *Reports* > *Saved Reports tab*, the Saved Reports tab contains the list of reports that you have saved.

- To run a saved report, click its *Run* button.
- To delete a saved report, click its *Run* button and then click *Remove*.
- To sort the saved reports, click the ascending or descending buttons in the column headings.
- To filter the saved reports list, type the filtering text in the box in the column headings. The box appears when there are enough saved reports to filter.
- To find a saved report, you can use the drop-down lists to filter the saved reports by the data in the columns. You can also use the sort ascending and sort descending arrows to sort the columns.

Related Information

Saving a Report [page 1329]

25.21 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.

25.22 Editing Report Details

View this section if you want to know about editing report details.

Some administrators have permission to import custom reports. Go to Reports and click the *Edit* button. The Report Details page opens. If you see a *Save* button on the page, then you can edit the details of a report in the following ways:

This Field...	...Is used as follows
Description	The description is viewable by the target users and indicates what they should expect when they run the report.
Comments	Comments are viewable only by administrators who have permission to edit the report information.
Target Users	A target user is the intended user of the report. You set the target user when you import the report, but you can change it here.

This Field...	...Is used as follows
Security	You can change the basis for security roles of the report. You set security when you import the report, but you can change it here.
Security Domain	The security domain of the report affects the users who can run the report. Only users with access to the security domain (and access to the Run Report permission) can run the report.
Report Group ID	The unique ID of the report group that the report belongs to. You can add report groups in the Report Groups section. Report groups are reports that run the same query but whose results are grouped differently.
Report Group Name	The name of the report group as it appears to the user. The report group label is set when you create the report group ID.
Published	A published report is available for the target user to run. Unpublished reports aren't available. To publish a report, you must specify a target user and a category.

When you finish editing the report information, click *Save*.

Other actions available on the Editing Report page:

- Export report
- Delete report
- Publish report
- Edit Report Definitions and Configuration

Related Information

SAP SuccessFactors Learning Report Groups Fields [page 1310]
Exporting Reports [page 1324]
Deleting a Report [page 1332]
Publishing a Report [page 1326]
Editing Report Definitions and Configuration [page 1331]

25.23 Editing Report Definitions and Configuration

View this section if you want to know about editing report definitions and configuration.

We introduced the BIRT framework at 5.8 SP5. Any reports you customized in 5.8 SP4 and previous continue to work in the legacy framework as they did in 5.8 SP4.

When you upgrade an existing custom report from SP4 to later versions, you see two additional tabs in the Edit Details page: the Definitions tab and the Configuration tab. The XML definitions and configuration are contained in the tabs. See the Reporting Framework Guide for more information about editing the XML.

Related Information

Editing Report Details [page 1330]

25.24 Unpublishing a Report

View this section if you want to know about unpublishing a report.

Reports can be published or unpublished:

- Published: Published reports are available to any target user who has access to the domain of the report and who has the Run Report permission.
- Unpublished: Unpublished reports are available to users who have access to the Run Unpublished Report permission.

You can "unpublish" a report by clearing the *Published* check box. To clear the check box, go to the Reports tab and click the title of the report you want to unpublish.

When you unpublish a report:

- Users can view any saved report based on the unpublished report, but they cannot run it.
- Any pending background jobs are cancelled.
- Any future recurring report jobs are cancelled.

25.25 Deleting a Report

View this section if you want to know about deleting a report.

When you delete a report, the system permanently deletes:

- The report from the search and browse pages
- The permission Run [report title] Report (and detaches it from roles)
- Pending background jobs for the report
- Future, recurring report jobs

To delete a report, edit the report and click *Delete*.

Related Information

Editing Report Details [page 1330]

25.26 Report Permissions

View this section if you want to know about report permissions.

Access to reporting tasks are controlled by permissions in Talent Management security. Access to data is restricted by security domains (that is, when a user runs a report, the report returns only data belonging to the user's security domain). A set of permissions and security domain groups are combined to create a security role, which is then assigned to a user. For example, users can be assigned to a role that allows them to access the Run Class Roster Report permission. However, when they run the report, it only returns classes from the security domains that the role permits.

Reporting users need access to one or more of the following permissions.

Permission	Task Controlled	Security Domain Restricted?	Notes
Search Reports	Ability to search and browse reports	N	
Run [report title] Report	Running the report specified in the [report title], which includes: • View report details • Run report • Save report • Schedule report • Delete recurring report	Y - Security domain restricted on the entity the report focuses on, but not the report itself. Access to the report itself is controlled by the permission: there's one permission for every report.	When you import custom reports, a permission is added for your new report. Run Report is a critical permission because it controls access to the report. Other permissions depend on that control for their access.
Run Unpublished Reports	Run reports that are **not** published.	Y	Assign this permission to administrators who test imported reports before they're published. This permission can be used with the Publish/Unpublish Report permission to allow a tester to test reports, and then publish them when testing is complete.

Permission	Task Controlled	Security Domain Restricted?	Notes
Edit Report	Edit Report Information	Y - Users can edit only reports to their roles' security domains.	Without access to the Run [report title] Report permission, users can't see the report and therefore can't edit it.
Edit Report Users	Edit reports in the User Reports category.	N	
Delete Report	Delete a report from Talent Management. With this permission, the Delete button is visible in the Editing Report Information page.	Y - Users can delete only reports that belong to their roles' security domains.	Without access to the Run [report title] Report permission, users can't see the report and therefore can't delete it.
Publish/Unpublish Reports	Publish Report	Y - Users can publish only reports that belong to their roles' security domains.	Without access to the Run [report title] Report permission, users can't see the report, and therefore can't publish or unpublish it.
Import/Export Reports	Importing Reports Exporting Reports	Y - Users can export only reports that belong to their roles' security domains.reports	Without access to the Run [report title] Report permission, users can't see the report and therefore can't export it. During the import process, Talent Management creates the Run [report title] Report permission and assigns the current user to it.
Run Custom Report (Legacy)	Run legacy custom reports	N	This permission applies to old custom reports. New custom reports use the Run [report title] Report permission.
Edit Custom Report (Legacy)	Edit legacy custom reports	N	This permission applies to old custom reports. New custom reports use the Edit Report permission.
Delete Custom Report (Legacy)	Delete legacy custom reports	N	This permission applies to old custom reports. New custom reports use the Delete Reports permission.
Run External Reports	See external reports and run them	N	See External Reports

Permission	Task Controlled	Security Domain Restricted?	Notes
Edit External Reports	Edit external reports	N	See External Reports
Delete External Reports	Delete external reports	N	See External Reports
View Report Query	Ability to see the query that got the data in any one individual report.	N	This should be used for administrators who need to troubleshoot reports.

Related Information

SAP SuccessFactors Learning Report Query [page 1340]
Enabling the Report Query View [page 1340]

25.27 Communication Checklist with Report Writers

View this section if you want to know about the communication checklist with report writers.

To successfully import and export custom reports, you must communicate effectively with the person who creates custom reports, also known as the report writer. You interact with the report writer in two ways:

- You receive custom report .zip files from the report writer to be imported into Talent Management.
- You export custom report .zip files from Talent Management and send them to the report writer to edit.

25.27.1 Communication Checklist for Importing Reports

View this section if you want to know about the communication checklist for importing reports.

When report writers deliver custom report .zip files, they should communicate the following information:

- The version of Talent Management that the report writer used to create the report. This version must match your version of Talent Management. You can check your version in the *Global Application Settings* page.
- Who is the target audience of the custom report? The answer to this question determines the Target User during the import process, as follows.
  - End Users: Any user of the Talent Management end-user environment
  - Managers: Any end user in a managerial role
  - Organization Owners: Any head of an organization
  - Administrators: Any user of the administration environment
- Does the report replace an existing report? If so, then you should expect the Existing File column to be populated and you should expect to overwrite the existing report.

- Does the report library replace an existing library? If so, then you overwrite the existing library when you import the new one. If however, the report writer hasn't changed the library, you can keep the existing library in your system (in other words, it is not overwritten).
- Does the report .zip contain any changed labels? If a report contains changed labels, you must import those labels. The import labels process occurs in the System Administration area of the application. If you open the report .zip file and see an ApplicationResources.properties file, there's a chance the report writer updated labels.

25.27.2 Communication Checklist for Exporting Reports

View this section if you want to know about the communication checklist for exporting reports.

When you export a report for report writers, you should communicate the following information:

- The version of Talent Management that the report was exported from
- The purpose and users of the report (this will help the report writer design usable reports)

25.28 Testing Reports

View this section if you want to know about testing reports.

After you import a new report but before you publish it, we recommend that you test it to make sure that it's extracting and displaying the data correctly. Although your organization should define its own test plan, we recommend the following:

- Testers need access to the Run Unpublished Report permission, which allows them to run the report before users can run it.
- Testers should have more than one logon to test domain-level security. You can, for example, set up one role with access to Security Domain1 and another with access to Security Domain2 to test that a report returns only data belonging to the proper security domain.
- Testers should pay special attention to any filters in the search criteria because filters use the Search Framework, which differs from the BIRT system.

Related Information

Report Permissions [page 1333]

25.29 Troubleshooting the Report Import Process

View this section if you want to know about troubleshooting the report import process.

The following are common problems in the report importation process and their solutions.

Problems	Solutions
Missing Files from .zip:	You're missing files from the .zip archive if the application tells you that the .zip file is formatted incorrectly. If you're missing files from the .zip archive (or if it has other problems), ask the report writer for another .zip file. Sometimes a report writer accidentally corrupts the file by manipulating the .zip archive outside Plateau Report Designer.
Labels do not appear correctly:	If a report writer changed the ApplicationResources.properties file, you must use the label import/export wizard to import new labels. If you don't import the new labels, you see outdated, incorrect text or "null."
Report appears to wrong group:	If you want only a particular group of users to run the report, you need to use security to restrict access to the Run [report title] Report permission.
Report does not pull correct data or does not run:	Communicate with the report writer to understand the libraries that the report uses. The report writer might have changed a library, and you didn't overwrite the library during import.

25.30 Troubleshooting Reports

View this section if you want to know about troubleshooting reports.

After you import reports, you test them. While testing the unpublished report, you might see problems with the report. You can diagnose and fix problems with the following information:

- Common Problems
- How to Troubleshoot Report SQL
- Business Intelligence Reporting Tool (BIRT) Behavior to Avoid

25.30.1 Common Configuration Issues with Plateau Report Designer

We find that many customers have similar configuration issues with Plateau Report Designer.

Issues	Resolutions
Data set does not show all tables	By default, the BIRT plug-in for Eclipse sets a small number of tables to return in the data set. You can change the preference at *Windows* > *Preferences* > *Report Design* > *Data Set Editor* > *JDBC Data Set* > *Maximum number of tables in each schema to display*. We recommend setting it to 100. Avoid setting prefetch to true, especially if you are working in a development database.
Missing libraries	If you cannot see any libraries, such as parameters, export the libraries from Talent Management and give them to the report designer. Talent Management acts as the system of record for libraries (and labels). For more information about what you need when you first start Plateau Report Designer, see Getting Started.
Labels do not appear correctly in the run-time reports	Coordinate with the report writer to match the Talent Management .properties file with the .properties file in your workspace. You can provide the the writer with your .properties file or import the writer's file using the import/export labels wizard. Doing so prompts Talent Management to update the BIRT resources folder (defined in elms.xml) for you.
JNI shared library download fails	Configure a JVM 32-bit in the PlateauReportDesigner.ini.

Related Information

Oracle Java Runtime Environment (JRE) for SAP SuccessFactors

25.30.2 Troubleshooting Report SQL

View this section if you want to know about troubleshooting Report SQL.

To debug BIRT report queries, set the Log4J reporting level to DEBUG and search the logged SQL output from the reports. (BIRT engine log settings are stored in the elms.xml file). Talent Management writes the SQL to the log (or console) and you can see the run-time SQL.

Talent Management adds comments to the SQL to help you find what you are looking for. There are three different comments added, and each has a start and an end comment.

- SEARCH FILTER: The filtering search SQL
- SEC FILTER: The domain filtering (security) SQL
- ORDER BY: The ordering statement SQL

For example, at run time, you see:

```
select a.stud_id, a.lname, a.fname
from pa_student a
where a.active = some selection
/* SEARCH FILTER START*/
and a.stud_id in (filtering query)
/* SEARCH FILTER END*/
/* SEC FILTER START*/
and 1=1
/* SEC FILTER END*/
/*ORDER BY START*/
 order by order by field
/*ORDER BY END*/
```

Sometimes, you see 1=1 in one of the filters. Talent Management substitutes 1=1 for a SQL statement when a condition is always true.

25.30.3 BIRT Behavior to Avoid

View this section if you want to know about BIRT behavior to avoid.

Because Plateau Report Designer is built as a plug-in to Business Intelligence Reporting Tool (BIRT), report writers can do things in BIRT that are not wrong, but are contrary to the spirit and purpose of Plateau Report Designer. You might see some of the following in reports that you import. Communicate with the report writer to resolve the issue.

BIRT Behavior to Avoid	Description
Write filters in the SQL Statement	In Plateau Report Designer, report writers can filter report data in one of two ways: • They can use BIRT functionality to build filters. Their SQL query returns numerous records to memory and the BIRT filter removes unwanted records before the results appear to the user. • They can use a WHERE clause in your SQL statement to filter records. Their SQL query returns only the records that you want, resulting in a lesser hit to memory. For performance reasons, they should write SQL statements that only return records that they want in your report. In general, they should write a better SQL statement rather than use BIRT functionality that replicates something could be in a SQL query.

BIRT Behavior to Avoid	Description
Data Binding	Data binding is tricky, and an important part of Plateau Report Designer. If you see repeated rows in tables of a report, it is possible that the report writer made a data binding error.
SID Issues in Queries	Sometimes, BIRT inserts the SID into a report SQL. When the SID is in the query itself, it can cause problems when you migrate from development to staging to production. In general, be aware of anything in the query that is schema-specific.

25.30.4 SAP SuccessFactors Learning Report Query

SAP SuccessFactors Learning administrators or implementation partners, can view the query that generates SAP SuccessFactors Learning reports.

Most administrators don't need to see the exact query that SAP SuccessFactors Learning ran to generate a report, but for a small subset of administrators and partners, the query is very important. It can tell those users how the report fetched its contents. If the report has unexpected or missing data, the query can usually lead to answers.

If your role has access to *View Report Query*, you can go to *Reports* > *Report Jobs* to find the query for any report. For the report that want to view, click *View Job* and then click *View Report Query*. The query downloads as a .txt file.

Related Information

Enabling the Report Query View [page 1340]

25.30.5 Enabling the Report Query View

Enable the report query view for SAP SuccessFactors Learning reports if you need to troubleshoot them.

Context

Enable the report query view for administrators who need to troubleshoot SAP SuccessFactors Learning reports. The report query affects reports run from the *Reports* section of SAP SuccessFactors Learning administration.

Procedure

1. Log in to SAP SuccessFactors Learning administration and then go to *System Administration* > *Security* > *Role Management*.
2. Find the role that should see the report queries and open it.
3. Go to *Permissions*.
4. Add the permission *View Report Query* to the role.

25.31 Notification About Disabled Report Jobs in Learning

When a report job fails four times consecutively, the job is disabled by the system. This makes sure that the system isn't burdened with running such reports.

There are report jobs that have failed consecutively four times. These report jobs are disabled in the system, and aren't executed any further to reduce the system load. The administrators and users of the reports are notified through e-mail about the failure. Administrators can choose to configure these report jobs with new scheduling parameters, if they want to continue running these jobs. In case, an administrator or a user e-mail isn't configured in the system, then they can get information about the disabled report jobs from the jobs monitor.

25.32 Setting up a Plateau Report Designer Account

View this section if you want to know how to set up a Plateau Report Designer account.

Context

Procedure

1. Log on to SAP SuccessFactors Learning Administration as a user with System Administration rights.
2. Go to *System Administration* > *Security* > *Administrator Management*. Click the *Add New* link.
3. Complete the form. For help with the form, see Administrator Management. Make note of the user name and password you're creating. This is the user name and password you'll pass on to the report designer.
4. Click *Add*.
5. On the Assigned Roles tab, type *REPORT_DEVELOPER* in the *Role ID* box. Type this exactly as it appears—all caps, with the underscore.

6. Change other preferences of the user as necessary for your organization. For example, you might assign other report permissions to the user.

Related Information

Learning Administrator Management [page 861]
Report Permissions [page 1333]

25.32.1 What your Project Manager Provides

View this section if you want to know about what your project manager provides.

When your organization requests Plateau Report Designer, SuccessFactors Hosting creates access through a read-only schema user to your staging database. As such:

- Plateau Report Designer can only read from your database.
- Plateau Report Designer can only read staging data from your database.

Your project manager also provides you with a URL. This URL points to a Virtual JDBC, running at SuccessFactors Hosting. Virtual JDBC is a proxy that allows secure JDBC communication through the firewall. Report designers use this URL to connect to the staging database.

25.32.2 Your Responsibilities as an Administrator

View this section if you want to know about your responsibilities as an administrator.

As an administrator, you need to set up a user account for Plateau Report Designer users. You create and maintain them for security reasons: you are in control of the users in your system. Report designers their accounts in two different scenarios:

- Report designers use the account to connect to your staging database from the Plateau Report Designer via Virtual JDBC. Virtual JDBC is a proxy connection to allow JDBC traffic through the firewall.
- Report designers use the account to log into the administration interface to download report libraries, import and export reports, test reports, and perform other tasks within the SuccessFactors Learning Administration interface.

To assist Plateau Report Designer users, understand the recommendations for report designers' user names and passwords, set up their accounts, and communicate account information to them.

25.32.2.1 Recommendations for Report Designers' User Names and Passwords

View this section if you want to know about recommendations for Report Designers' user names and passwords.

You can launch PRD from Learning Administration in *Admin Center* of SAP SuccessFactors, and generate a password to log in to the tool. You can also use a desktop client of PRD with the generated password, provided you download the latest version of the PRD client. The newly generated password is valid for 2 days, after which you need to generate a new password in *Reports* > *Learning Report Designer* > *Report Designer Client And Parameters* > *Generate New Password* for security purpose.

> **Note**
>
> SAP recommends downloading the latest version of PRD.
>
> If your organization uses *Identity Authentication Service* for authentication, then your native login credentials won't be supported.

We recommend the following when you create user names and passwords for the report designers:

- Create a unique administrator user name and password for every worker using Plateau Report Designer. By doing this, you can terminate the Virtual JDBC access for one user without affecting the others.
- Assign the report designers to the REPORT_DEVELOPER role to give them Virtual JDBC access. Consider the other security you like to grant or deny to report designers. Remember, the report designer can use the user ID to log in to SAP SuccessFactors Learning Administration to do things like:
  - *Importing/Exporting Reports* – The report designers can import and export reports and libraries into Talent Management on their own or you can import and export for them (or someone you designate).
  - *Run Unpublished Reports* - Running unpublished reports is a way to test reports before the average user can see them. You can allow report designers to test their own reports or you (or someone you designate) can test the reports.

You can read more about the permissions associated with reports in Report Permissions. You can read more about security and permissions in general in *Security*.

Related Information

Report Permissions [page 1333]
Security Implementation of SAP SuccessFactors Learning [page 1084]

25.32.2.2 Communicating Account Information with Plateau Report Designer User

View this section if you want to know about communicating account information with a Plateau Report Designer user.

When you deliver the Plateau Report Designer installation wizard, you also provide the following to the report designers so that they can connect the Plateau Report Designer to the staging database. With a connection to the staging database, they can author and test reports in Plateau Report designer.

- The URL you were given from your project manager
- The user ID and password you created
- The URL to SuccessFactors Learning Administration

Additionally, you should tell the report designers that when they first open Plateau Report Designer, they should read these topics in the Plateau Report Designer help:

- *Plateau Report Designer* > *Getting Started - About* : This topic provides a basic orientation to the report designer, including what they need to do to get started using Plateau Report designer.
- *Plateau Report Designer* > *Using Virtual JDBC:* This topic provides instruction on how to take the URL, User ID, and Password you gave the report designer and create a Virtual JDBC link to staging data. The report designers use this link to design and test their reports within Plateau Report Designer.
- *Plateau Report Designer* > *Troubleshooting:* This topic provides common mistakes made in Plateau Report Designer, plus some information about how to diagnose and fix those problems. It also includes actions to avoid.

26 Personalization Options in Learning Administration

You can personalize Learning Administration to organize your workspace.

As a learning administrator, you can always go back to your home page by clicking *Home*. From the home page, you can launch commonly used workspaces and check the welcome message.

You use some learning objects often: courses that you're managing, for example, or learner profiles that you're troubleshooting. Learning tracks your recently viewed objects in *Recents* so that you can go back to an object.

You can use saved searches and filters to create shortcuts to searches you run often. For example, if you're responsible for learners in two organizations, you can save a search that filters by the two organizations. When you load the saved search, it loads your organizational filter. You can then extend the search criteria: you can, for example, add last name "Smith" and then click *Search*. In this example, the saved search is a shortcut that loads your organizational responsibilities into a filter.

26.1 Personalizing Your SAP SuccessFactors Learning Home Page Layout

As a learning administrator, you can personalize your home page layout to split the page between welcome and quick links.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then click *Home*.
2. Click *Choose A Different Layout Choose* .
3. Select a layout that works for you.
4. Click *Save*.

26.2 Disabling Guide Me Mode for your Home Page

During implementation, your organization might enable guide me mode, which provides less experienced administrators with a guided experience for completing tasks. As you become more experienced, you can disable it.

Procedure

1. Go to SAP SuccessFactors Learning administration and then click *Home*.
2. Click *Preferences* .
3. Clear *Guide Me Mode*.

   > ⓘ Note
   >
   > If you do not see *Guide Me Mode*, then it was never enabled globally and you have nothing to turn off.

4. Click *Apply Changes* in *General Settings*.

   > ⓘ Note
   >
   > The preferences page has multiple *Apply Changes* buttons. To apply your change, you must click the button under *General Settings*.

26.3 Saving Searches or Revising Saved Searches in Learning Administration

Save searches or revise them so that you create shortcuts to searches that you run often in Learning Administration.

Context

When you save searches, you can quickly open and run them again. Saved searches reduce the time you spend crafting the search criteria and they guarantee the consistency of the search input.

> → Tip
>
> You can save searches as foundations for other searches. For example, if you're responsible for learners in two organizations, you can save a search that filters by the two organizations. When you load the saved search, it loads your organizational filter. You can then extend the search criteria: you can, for example, add last name "Smith" and then click *Search*. In this example, the saved search is a shortcut that loads your organizational responsibilities into a filter.

Procedure

1. Open any search page in Learning Administration.
2. Run the search that you want to save.

   Run the search to test it. Verify that the results are expected.
3. Click *Save As*.
4. In *Save Search*, identify the search so that you can locate it later.

Choice	Description
Saved Search ID	If you're saving a new search, type an ID. Many organizations use a system in their saved search ID. For example, IDs start with the owner's initials. If you're revising a search, find the existing ID that of the search you're revising.
Description	Good descriptions help you identify your saved search later. Type a description that captures the purpose of the search and the type of results it returns.

5. Click *Submit*.

Next Steps

After you save a search, go back to that same learning object and click *Saved Search* to open it. For example, if you saved a search for courses, go back to courses and click *Saved Search*.

> **Note**
>
> To delete a saved search, click *Saved Search* and then click *Delete*.

26.4 Using Filters to Narrow Searches in Learning Administration

Use filters to narrow your search in Learning Administration by a category values.

Procedure

1. Open any search page in Learning Administration.
2. For the category you want to filter results by, click *Filter by Criteria*.
3. In the filter window, find the category values that Learning should include in the results.

   For example, imagine that your company has 50 organizations and you want to search for a learner profile with the last name "Smith." But you know that the learner is part of one of two organizations. In this case, you can

click *Filter by Criteria* in a user search, and then select the two organizations. The filter limits the search for "Smith" to the two organizations you selected.

4. Click *Search*.

26.5 The Components of Learning Administration Search

In Learning Administration, search pages have the same components regardless of what you are searching for.

Learning searches the database with criteria, operators, and text.

- **Criteria** are attributes of the record that you can use for searching. For example, user criteria include first name, last name, user ID. You can search for all users whose first name is "William." You can add and remove criteria by clicking *Add/Remove Criteria*.
- **Search Text** is the text that you are looking for. For example, when you look for a user with the first name of "William," the search text is "William." In some cases, the search text is a checkbox or a list of options to avoid typos. For example, the search text for active records is a checkbox because the actual underlying text is simply true or false.
- **Operators** tell the search how to treat the search text. For example, the "Starts With" finds text in the criteria that starts with the text that you type. For example "Will" finds "William," "Willard," Willhelm," and so on.

> **Note**
>
> If you don not type text or provide a filter, the search returns paged results of everything. For example, if you open courses and click *Search* without narrowing the search, you see pages of all courses.

26.6 Recents

The Recents tab in SAP SuccessFactors Learning Administration allows administrators to directly access their recently viewed entities and to search the list for specific entities.

The Recents tab displays the last 100 instances where the administrator accessed one of the following entity types:

- Assignment Profile
- Class
- Content Object
- Content Package
- Coupon
- Curriculum
- Curriculum Requirement
- Exam
- Free-of-charge subscription
- Item
- Library

- Prepaid Account
- Program
- Quiz
- User

Each time an administrator accesses a specific entity, an entry is added to the top of the Recents list. Accessing an existing entry on the list moves that entry to the top of the list. A Search field above the list allows administrators to search for text contained in an entity, title, ID, or any additional information displayed for an entry.

> **Note**
>
> When an entity is deleted or the administrator no longer has permission to access the entity, it's removed from their Recents list.

27 Translating Strings in Learning

Translate parts of Learning if your users speak many languages.

Prerequisites

To translate into a language, enable the locale of the language in *References* > *Manage Labels* > *Locales*.

Context

In Learning, you can translate any text that has a *Translate* button. For example, you can translate course titles so that learners can read the titles in their own languages. Not all text is translatable.

Procedure

1. Click *Translate*.
2. Add the translation of the text next to the language you're translating into.
3. Click *Finish* or *Apply Changes*.

Results

The system automatically creates a new label for the locales that you've provided a value for.

After you add a translated value, the system propagates that value throughout all of the application so that you can search for the records using the translated value. Learners can search the using translated values. For example, they can search for courses and Learning looks in translated titles for results.

> **Note**
>
> Learning doesn't create a new label ID when you edit an existing translation. It uses the existing label ID and overwrites the label value.

28 Not all Learning Settings Documented

Our product documentation does **not** provide an exhaustive list of configuration settings in Learning Administration.

SAP SuccessFactors does **not** describe all configuration settings in its documentation. Some are so infrequently used. Others involve the security of your system, so we want to keep the settings private. Still others are used most often in a troubleshooting scenario and therefore in coordination with Technical Support who can guide you through their use. If you see a setting in a configuration file and do not find it in the documentation, it likely fits one of these categories.

> → Tip
>
> If you see a setting in Learning Administration, but you **don't** see it in documentation, chances are that you should ignore the setting. We document the settings that are most critical to the implementation and administration of your system and the others are infrequently used, change the security of your system, or are for troubleshooting.

29 Deleting Programs from Learning History

You can remove programs from learning history as needed.

Procedure

1. Go to *Manage User Learning* > *Edit Learning History*.
2. Select a program and view *History Records*.
3. Choose *Delete*.

   A warning displays: "Are you sure you want to delete the history record?"
4. Choose *OK*.

> ⓘ Note
>
> If you need to delete a program and related item from learning history, you must delete the program **before** you delete the item. If only the item learning history is deleted, the program will be still be shown as completed for the user.

30 Removing Programs from Users

You can remove programs from the user entity to remove wrongful assignments.

Context

This tool is used to remove programs that haven't started or are in progress. If the user has completed the program, you can't use this tool to remove it from their assignments. You can edit Learning History to remove completed programs from users.

Procedure

1. Go to *Manage User Learning* > *Manage Assignments*.
2. Select *Remove Programs*.
3. Choose *Next*.
4. Enter a *User ID* and choose *Add* or choose *add one or more from list* to search for and select users.
5. After adding all users, choose *Next*.
6. Enter a *Type* and *Program ID* and choose *Add* or choose *add one or more from list* to search for and select programs.
7. After adding all programs, choose *Run Job Now* or choose *Schedule Job* and provide details.

Related Information

Deleting Programs from Learning History [page 1352]

31 Adding New Programs to Users

You can add new programs on the user entity to associate the programs to the user directly on the tab.

Context

If you're an admin whose roles allow you to assign programs to users and search programs, you can associate a program to a user.

Procedure

1. Go to *Manage User Learning* > *Manage Assignments*.
2. Select *Add Programs*.
3. Click *Next*.
4. Enter a User ID or add from your list.
5. Click *Next*.
6. You should receive a confirmation of the status: "Successfully added the programs from the specified Users."

32 Viewing the Programs Table on Item

You can view the Programs table on the item entity to understand the usage of the item in different areas of the application.

Context

Procedure

1. Go to the Item Entity Manager.
2. Initiate the process to view the Item-Program information.
3. If there are programs associated with the item, the system displays all fields sorted by the default sort column.

   By indicating a column you want to sort upon, you can observe that the attributes are sorted by that particular column.
4. If there are no associated programs, you receive the following message: "There are no programs associated with this item."

   The Edit, Remove, and Sort options aren't available on the toolbar.

33 Migration of Learning Competencies to Center of Capabilities

Migration from Competencies to Capabilities gets triggered on the SAP SuccessFactors Learning for Learning customers who have migrated to Job Profile Builder (JPB) from Job Description Manager (JDM) and have set up a Proficiency Rating Scale in the Center of Capabilities.

Benefit of Migrating to the Center of Capabilities

The Center of Capabilities is a platform for storing, assessing, recommending, and maintaining a holistic view of each worker's skills, competencies, certifications, communication style, and other attributes of the Whole Self Model. By migrating SAP SuccessFactors Learning competencies to capabilities, you can benefit from a wider set of capabilities such as skills, certificates, and so on that have been set up in the Center of Capabilities.

Integration of Competencies in SAP SuccessFactors Learning

Scenarios	Capability Integration with Learning	Additional Notes
For customers using the legacy Families and Roles, legacy Competencies from Job Description Manager (JDM)	• Run a job to export the competencies library into SFTP from **Provisioning**. → Remember As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support. • Sync JDM competencies to Learning using Competency Connector - SF	
For customers who have migrated to Job Profile Builder (JPB) and have set up the Capabilities Library, however, without the Proficiency Rating Scale configured and Capabilities Portfolio enabled in Centre of Capabilities.	• Run a job to export the competencies library into SFTP from **Provisioning**.	Learning Competencies aren't migrated and synchronized to Center of Capabilities.

Scenarios	Capability Integration with Learning	Additional Notes
	→ Remember As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support. • Sync JDM competencies to Learning using the SF Competency Connector.	
For customers who have migrated to Job Profile Builder (JPB) and have set up Capabilities Library, configured Proficiency Rating Scale, and enabled the Capabilities Portfolio in Center of Capabilities.	• The SF Competency Connector is paused and disabled. The connector is used to sync JDM competencies to Learning. Since the migration is triggered, JDM competencies are no longer required to synchronize to Learning. Instead, the existing competencies in Learning are migrated to Center of Capabilities. • A *Capabilities Synchronization* job is triggered to synchronize competencies from Center of Capabilities. This is an automatic job that runs in a recurring manner based on the schedule. • Learning Competencies are migrated to Center of Capabilities. When Learning competencies are migrated and synchronized to Center of Capabilities, the competencies in Learning are assigned a *Capability ID*. ⓘ Note For customers who haven't migrated, *Capability ID* remains empty. For competencies that are internal to Learning, that is, those competencies that haven't been synced from JDM, will not have a *Capability ID*.	• To access the Capabilities Synchronization page, ensure that you've the *Edit Capabilities Synchronization Automatic Process* permission. • The **Security Domain** must be configured before the migration and must be set to run the synchronization. If the security domain isn't configured, the security domain is fetched from the **SF Competency Configuration**, if it's available. Or else, the default security domain configured for the customer is taken. • The **Delta Synchronization Date** field is available by default after migration and it must be left blank if you don't need to override the start time for the Delta run. • You can make a capability inactive in Center of Capabilities and when you run the synchronization job, the data now synchronizes correctly in Learning. You can see the inactive capability by filtering using the *Inactive Competency Status* in Learning.

Use of Capability ID in SAP SuccessFactors Learning

- You can view the *Capability ID* when you navigate to:
  - *Rating Scale* for both Internal and External Competency
  - *Tasks* > *Competencies*
  - *Objectives* > *Competencies*
  - *Program* > *Competencies*
  - *Item* > *Competencies*
  - *Competencies Search*
  - *Competencies Summary*
- The *Capability ID* in Learning is mapped to *External Code* in Center of Capabilities.
- When you search using the search selector, the *Capability ID* field is available by default but is hidden. It can be manually added using the *Add/Remove Criteria* for search.

SAP SuccessFactors Learning Administration Search Selectors

- If you've customized the Competency search selector, ensure you verify the Competency search selector customization again.
- The search filter *Include System Rating Scale (Capabilities)* controls the display of rating scale ID by default. When you search using the option, by default, it displays the rating scales that are created by the user, and not the rating scales created by the Center of Capability synchronization job (those scale IDs will be filtered out by default).

Use of Other Fields in SAP SuccessFactors Learning

- Capability fields such as Capability ID, Competency Category, Capability Library, Capability Type, Capability Group, Core, Critical, and Trending are synchronized from Center of Capability to Learning. Furthermore, the Center of Capability has additional information and this information is also synchronized to Learning.
- The *Version Number* gets incremented during the initial synchronization.
- **Rating levels, name, and description are replaced by settings in Proficiency Rating Scale**: Rating levels in Learning were synchronized from JDM through the SF Competency Connector. These are teaser values that stored in Learning as Ratings. As part of the migration, the capabilities in Center of Capabilities have ratings as per the proficiency rating scale setting. Proficiency rating scale has proficiency levels as well as name and description of these levels. When Learning competencies are migrated to capabilities and are synchronized from Center of Capabilities, proficiency levels, name, and description are also synchronized to Learning. This affects the existing rating levels, name, and criteria for a competency, which will be replaced by those coming from Center of Capabilities.
- *Association of Rating level to Items and Programs are affected*: After the migration, the ratings of the competencies are replaced by those configured on Center of Capabilities. Hence, the rating levels that are associated to *Items* and *Programs* should be examined and checked again.

Actions Required After Migration

After migration, you need to:

- *Reassociate Ratings to Items*
  Since the *Ratings* will be synchronized from Center of Capabilities, Items will needs to reassociated to *Ratings*. This can be done manually or by using the *Item Connector*.

  > **Note**
  >
  > For *Item Connector*, the association continues with the *Competency ID*.

- *Reassociate Ratings to Programs*
  Since the *Ratings* are synchronized from Center of Capabilities, *Programs* need to be reassociated to *Ratings*. It's a manual process.

34 Qualtrics Email Feedback for Learning Completion

Configure SAP SuccessFactors Learning and Intelligent Services to send employee information to Qualtrics, so that you can send employees surveys in email to find out how they feel a Learning assignment they just completed.

Creating this integration requires:

- SAP SuccessFactors Learning.
- A Qualtrics account that includes a Employee Experience license for Lifecycle projects.
- Enabling Intelligent Services.
- Enabling Integration Service Registration Center.

You use your Qualtrics account to create surveys and view their results. All the settings to configure the contents and schedule for the email survey are performed in Qualtrics.

To add Qualtrics feedback opportunities, enable and integrate Qualtrics with your SAP SuccessFactors system. Refer to *Integrating SAP SuccessFactors with Qualtrics* for details.

Related Information

Integrating SAP SucccessFactors with Qualtrics

Enabling Learning Completion Events to Be Published to Intelligent Services Center

35 Learning Recommendations, Assignments, and Searching Courses in Opportunity Marketplace

Opportunity Marketplace is an all-in-one hub where employees and managers can create, access, take, and manage different types of opportunities.

For Opportunity Marketplace, different types of opportunities from multiple sources are curated for users to increase their proficiency in skills and competencies.

Learning Recommendations

Learning resources, including *Online Courses*, *Instructor-Led Classes*, *Blended Items*, *External Courses*, *Curricula*, *Programs*, *Collections*, and *QuickGuides*, are recommended to the user, based on the skills and competencies they're interested in, as well as those which the customer organization encourages users to engage with.

The recommendation types are *Peer Recommendations*, *Administrator Recommendations* from User's Assignment Profile, and *Machine Learning Recommendations*.

Learning Recommendation API

The API which sends these recommendations to Opportunity Marketplace is enhanced to include the following:

- Associated Capabilities and Competency information is available on Learning Recommendation cards in Opportunity Marketplace.
- The Source is updated when assigning items or programs from Opportunity Marketplace. This is required to understand the source or origin of the assignment so that a filter set of learning assignments can be provided to Opportunity Marketplace for the *Manage my Opportunities* story.
- The following two thumbnail images are a part of the Learning Recommendations API that are uploaded by the user:
  - Learning Item Specific Thumbnail Image
  - Learning Entity Default Custom Thumbnail

Additionally, there are multiple events which can occur for a Learning Recommendation card in Opportunity Marketplace, such as dismissing a recommendation, changes to Learning Item's rating or other entity level changes, changes to user catalog, changes to the user level locale preferences or subscribed topics, and more. For these events, the Learning Recommendations API refreshes once every 30 minutes by design.

However, when a Learning Item is self-assigned to a user by clicking on the Learning Recommendation card in Opportunity Marketplace, the Learning Recommendations API refreshes immediately instead of waiting for 30 minutes.

Learning Assignments

The *Manage My Opportunities* page is available in Opportunity Marketplace. Using this page, users can manage any self-assigned assignments from Opportunity Marketplace recommendations or SAP SuccessFactors Learning.

Limitations of Learning Opportunities in Opportunity Marketplace

Actions for all the items are not supported within *Manage My Opportunities*, and you need to go into the course details to take any specific action.

By design, when you assign a *Curricula* to yourself, the Recommendation card in *Manage My Opportunities* displays the *Items* for the *Curricula*.

Changes made to an item after the assignment is assigned aren't reflected.

> **Note**
>
> vSaaS customers must not enable *Manage My Opportunities* for Opportunity Marketplace in SAP SuccessFactors Learning as it is currently not available for vSaaS.

Searching Courses

Users can search all types of learning activities, including *Online Courses*, *Instructor-Led Classes*, *Instructor-Led with Online Content*, *Other*, *External Courses*, *Curricula*, *Programs*, *Collections*, and *QuickGuides*.by entering keywords in Opportunity Marketplace.

Limitations of the Search Capability in Opportunity Marketplace

Once an *Item* is published to the library and a new localized title is added to it without making any other change, then the localized *Item* title may not show up in the search result.

35.1 Enabling Learning Recommendations in Opportunity Marketplace

These are some of the steps to follow when getting started with Learning Recommendations in Opportunity Marketplace.

Prerequisites

Customers usually keep one learner security role in Learning that includes all permissions for all learners. If, however, you select permissions individually, then the user role that should access recommendations should have the recommendations permissions. For example, Access Personalized Recommendations and Access Recommendations Tile.

Context

In general, to enable *Learning Recommendations* in a SAP SuccessFactors Learning instance, the Learning Administrator can use the following steps:

Procedure

1. Go to SAP SuccessFactors Learning administration, and then go to *System Administration -> Configuration -> System Configuration*.
2. Edit LMS_ADMIN.
3. Set enableItemRecommendations to true. When you set enableItemRecommendations to true, learners can recommend learning items and programs to each other. They have peer to peer recommendation.
4. Click *Apply Changes*.
5. To show users a legal disclaimer to describe the origin of the recommendations engine content, set enableDisclaimerForTheExternalContent to True.
6. Click Apply Changes.

35.1.1 Adding Administrator Recommendations in SAP SuccessFactors Learning

As a learning administrator, you can recommend items, collections, and programs to assignment profiles. Users receiving these learning items, collections, and programs will see them as *Learning team recommends* on their home pages.

Prerequisites

You need to have the following learning permissions:

- Edit Assignment Profile Recommended Collections
- Edit Assignment Profile Recommended Items
- Edit Assignment Profile Recommended Programs
- View Assignment Profile Recommended Collections
- View Assignment Profile Recommended Items
- View Assignment Profile Recommended Programs

Procedure

1. Go to *Learning Administration* > *Manage User Learning* > *Assignment Profiles* and open the assignment profile you want to add learning recommendations.
2. Go to the *Recommendations* tab.
3. Choose *Add Collections*, *Add Items*, or *Add Programs*.
4. Search for and add the learning items, collections or programs.

Results

In Learning and Opportunity Marketplace, recommended learning items, collections, and programs will appear as *Learning team recommends* for the target users.

35.1.2 Adding Peer Recommendations in SAP SuccessFactors Learning

As a learning user, you can recommend learning courses to each other and these courses appear in the Recommendation tile in Learning and appear as *{Your Name} recommends* in Learning and Opportunity Marketplace.

Prerequisites

You need to have the following permissions:

- *Access Recommendations Tile* to access the Recommendation tile in Learning
- *Recommend to Peer* to recommend courses

Procedure

1. Open a course that you want to recommend.
2. Choose the *Recommend* button.
3. Search for and add users to whom you want to recommend the course.
4. If necessary, enter a comment explaining why you recommend this course.
5. Submit the recommendation.

Results

Users who receive your recommendation will see the course with the *{Your Name} recommends* tag in two locations: the Recommendation tile in Learning and the Opportunity Marketplace landing page.

36 SAP SuccessFactors Learning Terminology Glossary

Refer to this glossary for the terminology changes that SAP SuccessFactors Learning implemented as of 1H 2020.

Previous Term	New Term	Definition
catalog	library	A list of all items, curricula, and classes that are available to users in the learning management system.
subject area	category	A set of learning items and competencies grouped for the purpose of browsing or searching. Categories are administrator-created records that allow both users and administrators to search and filter their company's database records more easily.
order ticket	voucher	A single-use electronic ticket that allows users to access an item, class or course without having to pay for it. Companies can purchase vouchers on behalf of their users.
subscription	free-of-charge subscription	An electronic ticket that allows users to access all items, classes or courses available in a library at no cost (free of charge).
document	document link	A link to any type of media that can be associated with an item, curricula, or class. Administrators can attach documents to a class, for example, when the documents support the learning that takes place.
requirement	curriculum requirement	A necessary condition that a user must meet to receive credit for a requirement-based curriculum.
custom column	custom field	A field in the system that administrators can choose to use according to their business needs. Custom fields allow administrators to extend the data collection, tracking, and reporting for some of the LMS database records.

Previous Term	New Term	Definition
notification	email notification	An electronic message that is sent from SAP SuccessFactors Learning to a user or group of users. Administrators can configure the content of the email notifications and determine when they are sent.
notification syntax	email notification token set	A group of tokens that is used to insert dynamic content into email notification templates.
syntax tag	token	A data placeholder that is used when creating email notifications. When the LMS application receives a command to send an email notification, it builds the message by replacing a token with data from the database.
notification template	email notification template	A predefined layout and text for the message that a user receives when an event triggers the LMS application to send an email notification.
blended	instructor-led with online content	Describes training or learning that is facilitated by an instructor with an online learning component.
enable users to waitlist	waitlist	To place someone on a list of users who are attempting to register for an in-person training or learning event. If a registered user withdraws, then the first user on the waitlist is automatically registered.
learning event	history record	A database record indicating that a specific user has successfully completed an item, curriculum, or class.
schedule block	resource block	A block of time during which a resource (for example, a classroom, projector, computer) cannot be scheduled to be used by another class. Resource blocks are used to indicate that resources are unavailable and to prevent resource conflicts.
Content Network	Open Content Network (OCN)	A feature that allows users to easily access content from Massive Online Open Course (MOOC) providers from within SAP SuccessFactors Learning. When a provider is set up on Open Content Network (OCN), the provider's courses will appear in the user's library.
Follow-Up Evaluation: Application of Learning	follow-up survey	A group of questions that an observer answers about any behavioral changes they have witnessed after a user or group of users have completed a class.

Previous Term	New Term	Definition
Item Evaluation: User Satisfaction	course feedback	A group of questions (a survey) that a user answers to gauge the overall impression the user had about the course they completed or the class they attended.
questionnaire survey	survey	A group of questions that a user fills out after completing a learning item, and used to gather course feedback and application of learning.
alternate supervisor	alternate manager	A person who can assign learning or approve requests for a user instead of or in addition to the primary manager.
supervisor	manager	A person who oversees the training and learning activities of a user.
class	cohort	A group of users who proceed through the same classes together.
scheduled offering	class	An instance of a course that is scheduled to start and end at a specific time. Classes usually have other resources, such as instructors, classrooms, and training equipment.
slot	reserved seat	A seat in a class that a learning administrator can reserve for certain users.
global variable	global application setting	A setting that is applied globally for a user's implementation of SAP SuccessFactors Learning. Global application settings can control, for example, the default currency, user password settings and expiration, failed logons, and so on.
record	entity	A database record (user, item, class) that is used in the SAP SuccessFactors Learning application.
time slot	time frame	A time frame during which an automatic process can be scheduled to run.
workflow restr.	permission restriction	A type of access control that is applied to permissions to limit which users can perform specific permission tasks.
workflow	permission	A method to control access to database records and information in the Learning Management System (LMS). The name of the permission typically describes what action is permitted by the user (for example, Add Item, Add Curriculum).

Previous Term	New Term	Definition
external request	external learning request	An application submitted by a user who wishes to attend a training event outside their organization, and not managed from SAP SuccessFactors Learning Administration.
group	user group	A set of users who are grouped by their roles and learning requirements.
items completed	completed item	A basic unit of learning that has been assigned to a user and has been tracked to completion.
purchase order	prepaid account	An account used to allocate money for training. Users or organizations can use prepaid accounts to pay for training.
group instance	class group	A set of similar classes for reporting purposes (for example, classes that are taught at the same location, or to a certain audience, or for a specific purpose).
domain	security domain	A database record that is used to limit access for administrators and users.
domain restriction	security domain group	A database record that contains the domains that system administrators (for example, superusers) want to grant other administrators (for example, learning administrators) access to.

Important Disclaimers and Legal Information

Hyperlinks

Some links are classified by an icon and/or a mouseover text. These links provide additional information.
About the icons:

- Links with the icon : You are entering a Web site that is not hosted by SAP. By using such links, you agree (unless expressly stated otherwise in your agreements with SAP) to this:
  - The content of the linked-to site is not SAP documentation. You may not infer any product claims against SAP based on this information.
  - SAP does not agree or disagree with the content on the linked-to site, nor does SAP warrant the availability and correctness. SAP shall not be liable for any damages caused by the use of such content unless damages have been caused by SAP's gross negligence or willful misconduct.
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