

SAP SuccessFactors

PUBLIC

Document Version: 2H 2026 – 2026-10-15

Using Admin Center

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1 Admin Center

Admin Center is the central access point to a wide range of administration features and tools that you can use to configure and maintain each of your SAP SuccessFactors solutions. It also provides tools for monitoring overall system health and usage and for managing cross-suite and third-party integrations.

As a system administrator for any SAP SuccessFactors solution, the *Admin Center* gives you easy access to the tools you need.

Anyone with permission to see one or more admin tools or admin pages can access the *Admin Center*, but they can only see the tools and pages that they have permission to see. The admin tools available to you in *Admin Center* depend on the SAP SuccessFactors solutions enabled in the system and the permission granted to you, based on your role.

> ⓘ Note
>
> NextGen Admin is the only UI version and from now on will be referred to as the *Admin Center*. For more information, please refer to **Deprecation of OneAdmin and Transition to NextGen Admin** under **Related Information** explaining this transition.

Related Information

Deprecation of OneAdmin and Transition to NextGen Admin

2 Permission to Access Admin Center

Anyone who has been granted at least one administrative permission can access the *Admin Center*. That is, anyone who has permission to access at least one admin tool or admin setting can also access the *Admin Center* page. There is no separate permission that controls access to the *Admin Center* page itself.

3 Accessing the Admin Center

Go to the Admin Center landing page, where you can find all the administration tools that are available to you.

Prerequisites

You have permission to access at least one admin tool.

Context

Anyone with permission to see one or more admin tools or admin pages can access the *Admin Center*, but they can only see the tools and pages that they have permission to see.

If you don't have any administrative permission, you can't see links to *Admin Center* in the user interface or access the *Admin Center* page.

Procedure

1. Log in as a user with at least one administrative permission.
2. Navigate to *Admin Center* page in one of the following ways:
   - **Main navigation menu**. Select *Admin Center* from the main navigation menu in the global page header.
   - **User options menu**. Select *Admin Center* from the user options menu, below your name in the global page header.
   - **Action search**. If the action search feature is enabled, type **`Admin Center`** in the search box in the global page header and select it in the search results.

Results

You are taken to the *Admin Center* landing page. From there, you can access any administrative feature, tool, or setting that you have the permission to see.

4 Admin Homepage

The admin homepage is the entry point to the *Admin Center*. It is a tile-based landing page that provides quick access to many administrative features and a user experience that is consistent with the SAP Fiori standards.

As an administrator, you can personalize the admin homepage to suit your individual needs, by adding or removing tiles.

Tiles on the admin homepage give you quick access to many administrative features. Some tiles enable you to take action directly on the home page. Others provide a "snapshot view" and link you to another *Admin Center* feature.

> ⓘ Note
>
> For more information on different ways to search for tools, or to personalize your admin homepage, please refer to **Admin Tools**, **Finding a Tool in the Admin Center** and **Personalizing the Admin Center Homepage** under **Related Information** below.

Related Information

Admin Tools [page 27]
Finding a Tool in the Admin Center [page 27]
Personalizing the Admin Homepage [page 9]

5 Personalizing the Admin Homepage

As an administrator, you can personalize the display of tiles on the admin homepage.

Procedure

1. Go to *Admin Center*.
2. Choose the *grid* icon to open the *Tile Catalog*.
3. For each tile, choose *Add* to add it to your admin homepage or *Remove* to remove it.
4. Use the *Navigate Back* to the admin homepage.

6 Admin Alert Versions

In the past, there were two versions of Admin Alerts; the legacy Admin Alerts and the newer Admin Alerts 2.0. As Admin Alerts 2.0 has reached feature parity with the legacy Admin Alerts, we deprecated the legacy Admin Alerts tile, and renamed the newer *Admin Alerts 2.0* tile to just *Admin Alerts*.

About Admin Alerts

The *Admin Alerts* tile informs you of pending action items in your system, such as stalled workflows, integration issues, and HR data issues.

6.1 Admin Alerts

Admin Alerts inform you of pending action items in your system, such as stalled workflows, integration issues, and HR data issues.

System and HR administrators can access *Admin Alerts* through the Admin Alerts tile in Admin Center. Managers can access Admin Alerts through the quick action card on the home page.

There are several applications where Admin Alerts can be used at this time:

- Data Replication Proxy Creation
- Domain Event
- Employee Central Payroll and SAP ERP Integration (for Employee Central Data Replication Monitor issues)
- HR Data Issues
- Pending Recruits (for Manage Pending Hires)
- Position to Job Requisition
- Public Sector Cost Assignment
- Time Management
- Workflow
- Position Management
- Employee Central Compound Employee API

6.1.1 Permissions for Admin Alerts

Overview of the role-based permissions required to use Admin Alerts.

The following permissions are specific to Admin Alerts and can be found in the role-based permissions under *Administrator Permissions* > *Admin Alerts*:

- *Access Admin Alerts*
  When you have this permission, the *Admin Alerts* tile appears in the Admin Center. However, to see the actual admin alert types in this tile, you need additional permissions - for example, the relevant *Administrator Permissions* > *Admin Alert Object Permissions*, such as those available for Workflow.
- *Configure Alert Types*
  Users with this permission can configure different alert types.

  > **Note**
  >
  > There are some applications that don't use the *Admin Alerts* UI, but link directly from the *Admin Alerts* tile to their own application UI. This permission isn't required for those applications because the configuration can only be done under *Admin Center* > *Manage Data*, for object *Admin Alert Type Configuration*.
- *Trigger Rerun*
  Only grant this permission to senior admins because the rerun triggers the re-evaluation of **all** alerts of a particular alert type.

In addition, some applications, such as Workflow, have permissions specific to alert types for that application. Please look at the relevant application documentation for details.

> **Note**
>
> It isn't recommended to use the permission *Admin access to MDF OData API* in the *Metadata Framework* section for business users. This permission is only to be used for technical users in integration scenarios.

Related Information

Enabling Next Gen Admin
List of Role-Based Permissions

6.1.2 Setting Up Email Notifications for Admin Alerts

Get emails about new alerts for the alert types that are most important to you.

Prerequisites

- You've added your email address in the People Profile.
- You've got the *Access Admin Alerts* permission.
- You've either activated email notifications in your personal system settings under *Settings* > *Notifications*, or your company has enforced a company-wide setting for email notifications.
- The *Admin Alerts Notification* template under *Admin Center* > *E-Mail Notification Templates Settings* is selected.

Context

Instead of depending on the next scheduled job and checking for new alerts in the Admin Alerts tile, you can set up to get daily or weekly emails about new alerts for specific alert types.

Procedure

1. Go to *Admin Center* > *Admin Alerts*.
2. Select an alert type.
3. Choose the *Subscribe to Emails* button from the top-right corner.

   The button is only displayed if the prerequisites are met.

   You get a popup with a list of the alert types for which you have permissions.
4. In the popup, select the frequency of email notifications for the corresponding alert types. You have the following options:

   - Daily: Emails are sent daily after the nightly build has run.
   - Weekly: Emails are sent each Sunday after the nightly build has run.
   - None: No emails are sent.

   By default, the frequency is set to *None*.

Results

If alerts occurred, you get an email listing the alert types for which you've added a frequency other than *None*.

6.1.3 Enabling the Assignment of Alerts

Enable the assignment of alerts once to make it available for all alert types that allow this feature.

Context

Distribute workload or find substitution for colleagues on leave by assigning alerts to the relevant person for processing.

You can assign – and unassign – alerts to yourself or to others.

> **Note**
>
> Not all applications have this feature. In addition, some applications, such as Workflow, have permissions specific to alert types for their application. Please take a look at the relevant application documentation for details.

Procedure

1. Go to *Admin Center* > *Manage Data*.
2. In the *Search* field, select *Admin Alert Configuration*. In the second dropdown, select *AdminAlertConfigECode*.
3. Choose *Take Action* > *Make Correction* to get into edit mode.
4. Set the *Assignment Feature Enabled* field to *Yes*.

   > **Note**
   >
   > Leave the *Periodic Execution Enabled* field set to *Yes*.
   >
   > If you change the field to *No*, then the periodic run which updates the Admin Alerts during the night is set to inactive. Certain alerts that depend on the nightly periodic run (like stalled workflows, for example) will not be updated anymore automatically, and thus deliver outdated results.

Results

On the alert type detail screen for Admin Alerts, you can now see the *Assign* button, provided that the application allows this feature.

6.1.4 Solving Admin Alerts

Process and correct various issues in your system by choosing the appropriate action.

Prerequisites

You have the following *Administrator Permissions* > *Admin Alerts* permissions:

- *Access Admin Alerts*
- *Configure Alert Types*
- *Trigger Rerun*

For more information, please refer to Permissions for Admin Alerts [page 11].

Context

The *Admin Alerts* tile in the Admin Center displays warnings that, for example, some dynamic role users are invalid and require processing.

Procedure

1. Go to the Admin Center and select the *Admin Alerts* tile.

   The tile shows all admin alert types for which you have the required permissions, such as the Invalid Dynamic Role User.
2. Select the alert type that you want to work on.

   You get to the *Admin Alerts* detail screen which shows a list of the alerts received for the alert type you selected. The list shows only active data, but there's a *Show also inactive Admin Alert Types* box you can check so that inactive data also appears.

   > **Note**
   >
   > Some applications don't use the *Admin Alerts* UI, but link directly from the *Admin Alerts* tile to their own application UI. Refer to the application-specific documentation for more information on how to process these alerts.

   In the case of Invalid Dynamic Role Users, you see a list of those whose users are no longer valid because, for example, they've left the company.

   > **Note**
   >
   > For alerts related to *Event Subscription Management* errors, you can select the alerts under the alert type *Failed Domain Events*.

3. Select the relevant line to view the detailed information for an alert.
4. Select the checkbox for the alerts that you want to solve.

   If all alerts of an alert type have the same underlying issue, you can also select all of them at once by selecting the top-left checkbox.
5. Choose *Action*.

   Depending on the application the alert type belongs to, you can choose from a range of actions to solve the issue.

   If the issue has been solved, the alert is removed from the alerts list.

   The alerts that you've selected are executed asynchronously if the selected number exceeds a threshold. The threshold determines if the selected admin alerts are moved to the *In Progress* tab during execution. Each action has a threshold, which is predefined by each application. The thresholds are typically set to 100. For example, if you execute the **Change approver** action on 100 admin alerts, the system processes the alerts synchronously. If you select 101 and more admin alerts, then all of them move to the **In Progress** tab during execution. Alerts on the *In Progress* tab are blocked for any user action. The system works on the alerts until the list is depleted.

> ### ⓘ Note
>
> You can view the threshold of each action by selecting *Information* on the Admin Alerts UI.

> ### → Tip
>
> Select *Refresh* to see how many alerts on the *In Progress* tab have been processed.
>
> - If the action on alerts *In Progress* is successful, the alerts are removed from the alerts list.
> - If the action isn't successful, two things can happen:
>   - The failed alerts are moved back to the alerts list. To view details about the failed alert execution, select the ⚠ *(Warning)* icon in the ☰ *column*. It contains the following information:
>
> | | |
> |---|---|
> | Action | The name of the action. |
> | Message | A message related to the failed admin alert. |
> | Processor | The person who initiated solving the admin alerts. |
> | Date | The date on which the action was triggered. |
>
>   - The failed alerts stay in the *In Progress* tab, but aren't processed by the system. When this happens, do the following:
>   1. In *Admin Center* > *Admin Alerts*, select the *Failed Domain Events* admin alert type.
>   2. In the alert list, select the stalled alerts.
>   3. Select *Action* > *Retry*.
>   If the *Retry* action was successful, the alerts are then deleted. If the alerts are still valid, they're moved back to the alert list.

Next Steps

If you think you've solved the underlying issue that caused the alert, but the alert is still displayed in the alerts list, select *Recheck* from the actions list, if available. This removes the solved alert from the alerts list.

6.1.5 Configuring Admin Alert Types

Change the companywide configuration of an admin alert type.

Prerequisites

You have the *Administrator Permissions* > *Admin Alerts* > *Configure Alert Types* permission.

Procedure

1. Go to *Admin Center* > *Admin Alerts* and select the corresponding alert type.

   The *Admin Alerts* page opens, listing the alerts for the selected alert type.
2. In the top-right corner of the *Admin Alerts* page, select *Configure Alert Type*.

   The *Configure Alert Type* popup for the selected alert type opens.
3. Select the corresponding configuration option.

Results

If alerts are created in a job, then the changes are usually reflected in the next job run. There are some exceptions:

- For the *Frequency for Job Execution* configuration option, the selected frequency determines when the next periodic run is executed.
- For the *Active* configuration option, if it's set to *No*, the inactive alert type is no longer displayed on the *Admin Alerts* tile nor on the *Admin Alerts* page after you refresh the page.

  > ⓘ Note
  >
  > To display inactive alert types on the *Admin Alerts* page, select the *Show also inactive Admin Alert Types* checkbox that is displayed next to the *Admin Alert Type* dropdown list.
  >
  > To display inactive alerts also on the *Admin Alerts* tile, you need to change the settings under *Configure Alert Type* back to *Active* > *Yes*, which displays the alert type on the tile again.
  >
  > The alerts for the alert type that is set back to active are updated after the next rerun or periodic run.

Configuration Options for Admin Alert Types [page 17]
There are several options to make companywide configurations to admin alert types.

6.1.5.1 Configuration Options for Admin Alert Types

There are several options to make companywide configurations to admin alert types.

> **Note**
>
> Consider that not all configuration options are supported by all alert types. For more information, please refer to the application-specific documentation.

Active

Hides admin alert types from the *Admin Alerts* tile and the *Admin Alerts* page when the *Active* configuration option is set to *No*. This way, you prevent stalled workflows, for example, from cluttering the list of alerts and making you miss the important new alerts.

Include Past and Future Records

By default, only the current records are considered when alerts are created. You can include also past and future records in the next rerun or periodic run when alerts are created.

> **Note**
>
> This configuration option is available only for the *HR Data Issues* alert type.

Frequency for Job Execution

Defines the frequency with which the list of alerts is updated for an admin alert type.

For example, you check the alerts you're responsible for only once a week, so you don't want to get an update of which alerts are still open every day. By setting the frequency to weekly, you prevent the job running unnecessarily, using performance capacity.

> **Note**
>
> If the frequency is predefined for an alert type, you can't choose a different option.

Possible options are:

- *Daily*
  Job runs daily between midnight and 6 o'clock in the morning.
- *Weekly*
  Job runs once a week, early on Monday morning.
- *Monthly*
  Job runs the first Monday in the month, early on Monday morning.
- *Never*
  Stops updating the alerts until the job frequency is changed again, or until you select the *Rerun* button.

Stalled Days

Includes only workflows that have been stalled for the specified number of days.

> **Note**
>
> This option is available only for workflow alerts.

Number of days after which alerts are auto-acknowledged

You can configure the system to automatically acknowledge (auto-acknowledge) specific admin alerts after a defined amount of time.

6.1.6 Rechecking Admin Alerts

If an alert is still displayed in the alerts list although you've solved it, you can recheck if the underlying issue that caused the alert still exists.

Prerequisites

The alert type supports this function.

Context

This option checks if the reason that caused the selected alerts and any associated alerts still exists and updates the database accordingly.

For alerts that are solved directly on the Admin Alerts user interface, this is done automatically in the background. For alerts that are solved elsewhere, for example, on the application-specific user interface, the alerts might remain in the alerts list. To have them removed from the alerts list, you can do a recheck, or wait for the next job run.

Procedure

1. Go to the Admin Center and select the *Admin Alerts* tile.
2. Select the corresponding alert type.

   You get to the *Admin Alerts* detail screen which shows a list of the alerts received for the alert type you selected.
3. Select the alerts that you want to recheck, and select *Action* > *Recheck*.

   If the underlying issues that caused the alerts have been solved, the alerts are removed from the alerts list.

6.1.7 Options for Updating the Alerts List for an Alert Type

There are several options to update the list of alerts shown for an alert type during the workday, so that it displays only the alerts that are still valid. Which option you choose depends on its availability and your use case.

About the Alerts List

The list of alerts for all alert types is updated automatically depending on the frequency of the automatic job runs. However, during your workday, you might want to make sure that the list of the alert type you're working on is current and shows only the alerts that are still valid. Alerts that have been solved by you or your colleagues in the meantime should be removed from the list. To achieve this, you have several options to choose from on the *Admin Alerts* detail screen for an alert type.

> **Note**
>
> You only see the options that the corresponding application has defined for an alert type. In addition, the *Rerun* option requires a specific permission.

Options for Updating the Alerts List for an Alert Type

Option	Use Case	What this Option Does
Recheck	You think you've solved an alert, but it still appears in the alerts list. You want to make sure you've solved the underlying issues that caused the alert, and have the alert removed from the alerts list.	This option checks if the reason that caused the selected alerts and any associated alerts still exists and updates the database accordingly. For alerts that are solved directly on the Admin Alerts user interface, this is done automatically in the background. For alerts that are solved elsewhere, for example, on the application-specific user interface, the alerts might remain in the alerts list. To have them removed from the alerts list, you can do a recheck, or wait for the next job run.
Refresh	You want to see the alerts that are still valid for a specific alert type. Alerts that have been solved (and, if required, rechecked) by you or your colleagues after you've opened the page should be removed from the alerts list. If any new alerts have been created in the meantime, they should be added to the alerts list.	This option reloads the page for the current alert type to display the most recent list of alerts. It checks the current state of the alerts written to the database, but it doesn't make any changes to the database itself. That means if an alert that requires a recheck has been solved, but not rechecked, it still appears in the alerts list. You achieve the same behavior by closing the page of the current alert type, and opening it again.
Rerun	**Note** This option requires the *Trigger Rerun* permission. As a senior administrator, you want to manually run a job for a specific alert type again. For example, you expect that multiple alerts are caused by the same underlying issue, like the wrong configuration of the pay group. Solving the issue first and triggering a rerun then automatically solves the associated alerts and removes them from the alerts list.	This option checks **all** alerts for the alert type to see if they are still valid. It triggers an asynchronous job and writes the valid alerts to the database. Once the asynchronous job has finished, you need to refresh or reopen the alerts list for the corresponding alert type to see the changes reflected on the page.

6.1.8 Admin Alert Type Information

The *Admin Alert Type Information* popup displays additional information about the alert type selected, such as extensibility or retention periods.

The *Admin Alert Type Information* popup opens when you select the *Information* button in the top-right corner of the admin alert type page.

Admin Alert Type Information

Title	Description
Name	The name of the alert type as displayed on the user interface.
Description	A description of the alert type.
Extensible	If an alert type is extensible, you can add additional custom fields to be displayed in the alerts list. To be able to add additional fields, you need the technical name of the underlying alert object that is displayed here.
Retention of Alerts	If a retention period for an alert type is defined, the alerts that are older than the retention period are automatically purged in a nightly job. If no retention period is defined, the alerts stay in the alerts list until they're resolved.
Maximum Number of Unresolved Alerts	If a maximum number of unresolved alerts is defined for an alert type, and this number has been reached, no new alerts are created. In addition, the current alerts are not automatically updated even if they've been resolved in the meantime. You have to reduce the number of unresolved alerts by using one of the appropriate actions.

Related Information

Additional Fields for Admin Alerts [page 21]

6.1.9 Additional Fields for Admin Alerts

You can add custom fields to an alert object to display more information to alerts than what is included in the standard setup.

Each alert object contains a predefined list of fields that can be accessed using the *Settings* option on the *Admin Alerts* page of the corresponding alert type. For example, for the alert types based on the alert object *Time Management Alert* (such as *Generate Time Sheets*, *Recalculate Time Sheets*, and so on), you can display the user, the message severity, and other predefined fields. Using the *Settings* option, you can add or remove these fields to the alerts list, and sort, group, or filter them.

If you need additional information that is not included in the standard setup, you can add custom fields to the corresponding alert object and fill these fields with values from application objects.

1. Adding Custom Fields to an Alert Object [page 22]
   Add custom fields to an alert object on the *Configure Object Definitions* page.
2. Creating On Load Rules for Custom Alert Fields [page 23]
   Create an On Load rule to fill custom fields used in alert objects with the desired value.

6.1.9.1 Adding Custom Fields to an Alert Object

Add custom fields to an alert object on the *Configure Object Definitions* page.

Context

- You have the *Administrator Permissions* > *Metadata Framework* > *Configure Object Definitions* permission.
- You've checked that adding fields is possible for the corresponding alert type.
  You find this information on the *Admin Center* > *Admin Alerts* page of the corresponding alert type, by selecting the *Information* button in the top-right corner. In the popup that opens, you can see the name of the underlying alert object and whether you can add fields to it, under *Extensible*.

Procedure

1. Go to *Admin Center* > *Configure Object Definitions*.
2. Search for *Object Definition*, and select the corresponding alert object (for example, *Time Management Alert*).
3. Select *Take Action* > *Make Correction*.
4. In the *Fields* section, add a custom field.
5. In the *Details* of the added custom field, define the following settings:
   a. Set *Transient* to *Yes*.
   b. Set *Visibility* to *Read Only*.
6. Save your changes.

Results

The custom field is added to the *Settings* option on the *Admin Alerts* page for the alert type that is referring this alert object.

> **Note**
>
> To add the custom field to the alerts list, you need to reselect it from the *Settings* options every time you open the *Admin Alerts* page of the corresponding alert type.

Next Steps

To fill the custom field with values, define an on-load rule.

Task overview: Additional Fields for Admin Alerts [page 21]

Next task: Creating On Load Rules for Custom Alert Fields [page 23]

Related Information

Adding Fields

6.1.9.2 Creating On Load Rules for Custom Alert Fields

Create an On Load rule to fill custom fields used in alert objects with the desired value.

Prerequisites

- You have the following role-based permissions under *Administrator Permissions* > *Metadata Framework*:
  - *Manage Data*
  - *Configure Business Rules*
- You know the name of the corresponding alert object.

  You find this information on the *Admin Center* > *Admin Alerts* page of the corresponding alert type, by selecting the *Information* button in the top-right corner. In the popup that opens, you can see the name of the underlying alert object and whether you can add fields to it, under *Extensible*.
- You've added a custom field to the corresponding alert object on the *Configure Object Definitions* page.

Procedure

1. Go to *Admin Center* > *Manage Data*.
2. In the *Create New* field, select *Object Configuration*.

   The *Object Configuration* section is displayed.
3. In the *Object Type* field, select the alert object.
4. In the *Manage Data On Load Rules* section, select *Add Rule*.

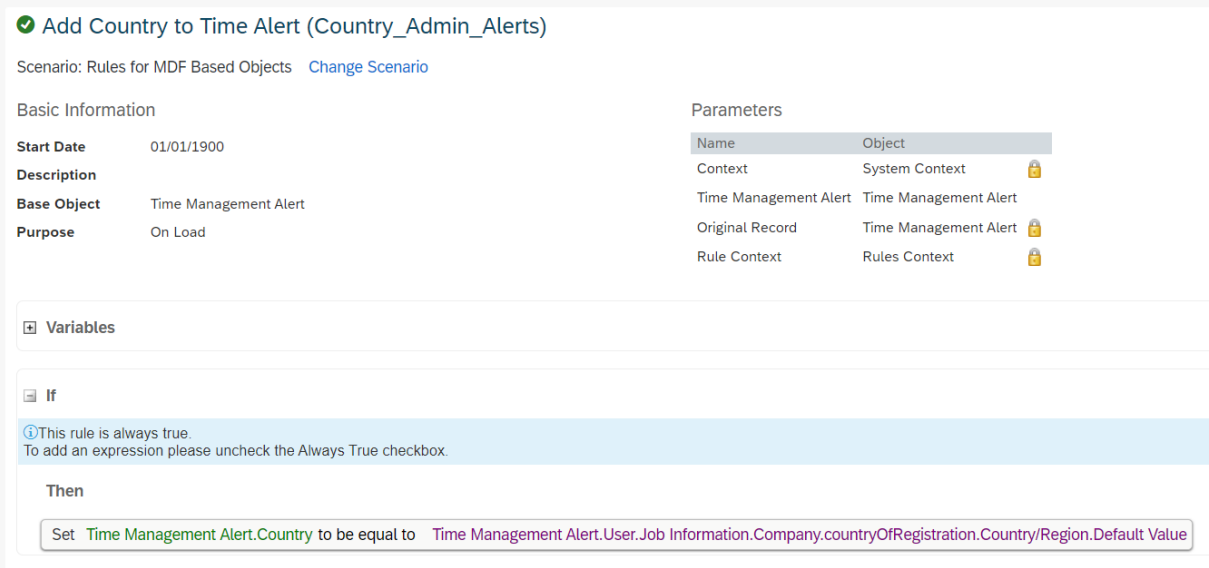
   The *Configure Business Rules* page opens, where the *Metadata Framework* > *Rules for MDF Objects* rule scenario is preselected.

5. Enter the required fields for the rule.
   a. As *Base Object*, select the corresponding alert object.
   b. As *Purpose*, select *On Load*.

> **Note**
>
> A different purpose could lead to performance issues or missing alerts (if the rule stops being executed for some reason, the alert object is not written to the database and thus alerts go missing).

6. Select *Continue* to get to the details page of the rule.
7. Define the rule that fills the custom field with the desired value.

   In this example, you define that the custom field *Country* is filled with the default value from the job information. The *If* condition is always true.



8. Save your changes.
9. Go back to the *Manage Data* page to select the rule you've just created in the *Manage Data On Load Rules* section.
10. Save your changes.

Results

The custom field is now filled with the corresponding values.

Task overview: Additional Fields for Admin Alerts [page 21]

Previous task: Adding Custom Fields to an Alert Object [page 22]

7 Admin Favorites

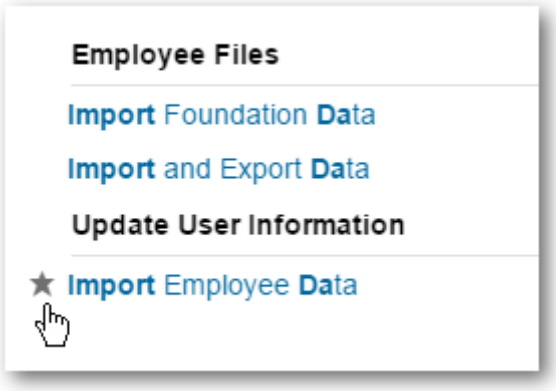
As an administrator, you can keep a list of favorites, for quick access to frequently-used tools. Favorites are a universal feature of the Admin Center.

In the Admin Center, your favorites appear under the *Favorite* tab on the *Tools* tile. You can also view a list of recently used tools by clicking the *Recent* tab.

Your favorites are also displayed on the *My Admin Favorites* tile on the main SAP SuccessFactors home page.

Adding and Removing Favorites

To add a favorite, click the *See All* link on the *Tools* tile and find the tool. Then, hover the cursor next to the name of the tool and click the star icon.



To remove a favorite, find the tool on the *Tools* tile, under the *Favorite* tab or in the *See All* view. Then, click the gray star icon.

8 Built-In Support

Built-In Support is your access point to SAP support within the SAP SuccessFactors HCM suite application.

Built-In Support is a support platform that provides digital services to find help, create tickets, and contact support. It's available in the global page header to people with *Company System and Logo Settings* permission.

You can use the (Built-In Support) icon to open it in a side panel on any page.

To access most functionality, like creating and monitoring support cases, an SAP Universal ID with linked S/P-user ID is required.

For more information, refer to Built-In Support documentation.

> **Note**
>
> Built-In Support is available on most, but not all, pages in the HCM suite. Currently, it **isn't** available or is only **partially** available in the following areas:
>
> - Career Site Builder
> - Learning

Related Information

Learn about Built-In Support on the SAP Help Portal

9 Admin Tools

Admin tools include a wide-range of administration tools and pages that you can use to configure and maintain your system. Each SAP SuccessFactors solution provides admin tools that help you adapt the solution according to the needs of your business.

The admin tools available to you in *Admin Center* depend on the SAP SuccessFactors solutions enabled in the system and the permission granted to you, based on your role. Anyone with permission to see one or more admin tools or admin pages can access the *Admin Center*, but they can only see the tools and pages that they have permission to see.

There are a couple of ways to access a given admin tool, depending on how your system is configured:

- With the tool search
- With the action search

> → Tip
>
> As an administrator, you can use action search to directly access a given admin tool from any page in the system.

9.1 Finding a Tool in the Admin Center

Use the tool search on the *Admin Center* page to navigate to a specific admin tool.

Prerequisites

You must have permission to view and access the admin tool you are looking for.

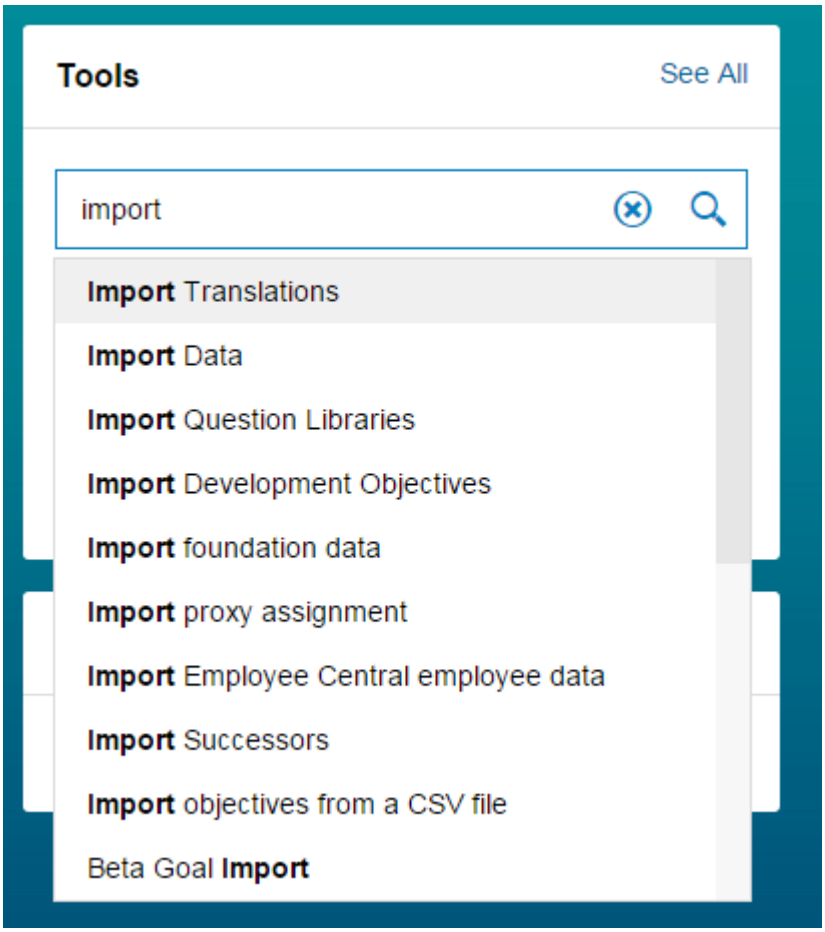
Context

Some admin tools require a specific permission in order to see them in search results or access the page. If you don't have the relevant permission, you do not see a link to the tool in *Admin Center*.

Procedure

1. Go to *Admin Center*.

2. Type the name of the tool or feature you want to open in the tool search box on the *Tools* tile on the admin homepage. Search results filter and narrow as you type.



> **Note**
>
> If you can't find the link you want by searching on the *Tools* tile itself, you can also click *See All* to view and then filter a full list of tools, grouped by solution or type.

3. Select the tool or feature you want to open from the tool search results.

Related Information

Accessing the Admin Center [page 7]

9.2 Finding an Admin Tool with Action Search

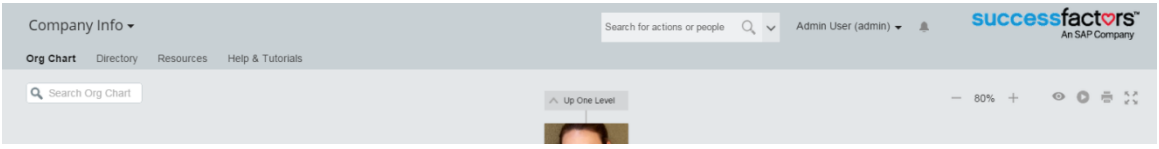
Use action search to navigate to a specific admin tool.

Prerequisites

The action search feature is enabled.

Context

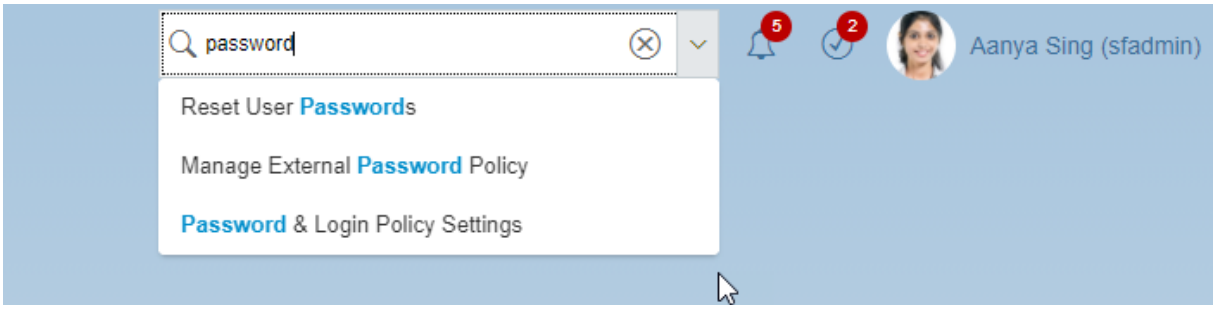
If action search is enabled, you see the phrase *Search for actions or people* in the search box in the global page header, as shown here:



If this phrase doesn't appear and you can only search for people in the search box, action search isn't enabled in the system, so you can't use it to find admin tools.

Procedure

1. Place your cursor in the search box in the page header, where it says *Search for actions or people*.
2. Type the name of the toolyou want to open or the administrative action you want to perform.



> **Note**
>
> If you can't find the link you want, try navigationg to *Admin Center* and using the tool search. This search is limited to administration actions and shows fewer results.

3. Select the tool or feature you want from the action search results.

10 Event Center

Event Center enables administrators to view and monitor suite-wide events that occur within the SAP SuccessFactors HCM suite, such as job information and employee changes.

You can use the Event Center dashboard to view event details and monitor event status. You can view the number of events that have occurred in the past twenty-four hours, seven days, or thirty days and whether they resulted in success or error. In case of error, you can view more details to quickly identify and troubleshoot errors.

The Event Center is an optional feature that is only available with Next Gen Admin. It must be enabled and configured separately. For more information about the Event Center, please refer to the *Event Center Administration Guide* on the SAP Help Portal.

11 Event Subscription Management

You can manage your endpoint URL subscriptions for all external events using the *Event Subscription Management* tool.

All of the external events supported in the *Event Subscription Management* tool are as follows:

- Add Global Assignment
- Approval of Offer Detail
- Assessment Rules
- Background Check Rules
- Calibration Session Activation
- Calibration Session Finalization
- Cancel Offboarding
- Change in Business Unit
- Change in Employee Department
- Change in Employee Division
- Change in Employee Location
- Change in Job Classification
- Change in Job Title
- Change in Manager
- Change in Name
- Change in WFA Permission Artifacts
- Change of Equipment Request Status
- Complete a Mentoring Program
- Completion of Learning
- Completion of a New Hire Activity
- Continuous Feedback Received
- Continuous Feedback Request
- Continuous Performance Management Achievement
- Continuous Performance Management Activity
- DocuSign envelope status update
- Employee Hire
- Employee Long Term Disability
- Employee Rehire
- Employee Short Term Disability
- Employee Time Off
- Employee Termination
- End Global Assignment
- End a Mentoring Relationship
- Event for Restarting Onboarding Process

- Expiration of Work Order
- External User Eligible for Hire
- External User Hiring Completed
- External user to Internal user conversion
- First Time Manager
- Homecard Application Status
- Individual Contributor to Manager
- Initiate Job Posting
- Initiate Offboarding
- Instance Sync Finished
- Internal Hire Process Completed
- Job Transfer
- Logical model change
- Manager to Individual Contributor
- Mass Workflow Approval
- Multiple Role Channel Event
- New Concurrent Employment
- New Position
- New Work Order
- Offboarding Step Complete
- Onboarding Initiated for Job Application
- Onboarding Process Variant Step Completion
- Onboarding Step Complete
- Onboarding is cancelled for the candidate
- Onboarding is initialized for the candidate
- Onboarding is initiated from an external Applicant Tracking System
- Payroll Data Maintenance Task Configuration Change
- Performance Review Form Routing
- Populate Performance Review Ratings
- Refresh Schema Search Data
- Spot Award Deleted
- Spot Award Given
- Start Probation
- Update of Candidate Profile
- Update of Compliance Process Status
- Update of Employee Competency Assessment
- Update of Job Application
- Update of Job Application Status
- Update of Job Requisition
- Update to a Position
- Updates Candidate's Country/Region to Russia
- Workforce Plan Update

11.1 Adding and Managing Event Subscriptions

You can add and manage your endpoint URL subscriptions to all external events using the *Event Subscription Management* tool.

Prerequisites

You have the *Create, Edit and Delete* permission to *Administrator* > *Manage Event Subscription* > *Access to Event Subscription* role-based permission. The *View* permission is enabled by default.

Procedure

1. Go to *Admin Center*.
2. In the *Tools Search* field, enter *Event Subscription Management*.
3. Select an event from the dropdown and choose *Add* to create a new event subscription. Newly created or migrated event subscriptions will appear as a list.

> **Note**
>
> You can add upto a maximum of six subscriptions for an event, inclusive of:
> - New subscriptions created in *Event Subscription Management*.
> - Existing subscriptions migrated from the old *Event Notification Subscription*.
> - The subscriptions maintained under the *Event Connector* for any event in *Intelligent Services Center*. Any changes made to subscriptions in the *Intelligent Services Center* tool will also reflect for the same subscriptions in the *Event Subscription Management* tool, and vice versa. The data will be maintained in both tools.
>
> .

4. Enter the following details:

Parameter	Description
Name	You can add a name for new subscriptions as per your choice. For event subscriptions which have been migrated from *Event Notification Subscription* the name field will be pre-filled with something generic, for example, **New Subscription 1**, **New Subscription 2**, etc., and you can edit these names. For events from *Intelligent Services Center*, the same name will carry over to *Event Subscription Management*.

Parameter	Description
Endpoint URL	Enter the URL of the endpoint.
Authentication Type	Select the following authentication type from the dropdown: • *Certificate Based Authentication*: Authentication is established with the endpoint using X509 certificates. *X509 Certificates* can be selected from the dropdown list. Choose *Refresh* to reflect the latest certificate. **Note** • To access X509 certificates, you must have the *View* access to *Access to X509 Certificates* permission. You can choose only *External CA* and *SAP Cloud Root CA* X509 certificates. • To generate a new X509 certificate, select *Click to maintain Certificates*. For more information, refer to Generating X509 Certificates in the related information. • *OAuth Authentication*: Allows you to connect to the endpoint using token URL, client ID, client secret, and scope combination. • *Token URL*: The URL to get the access token. • *Client ID*: The authorization server issues the registered client, a client id - a unique string representing the registration information provided by the client. This is a mandatory field. • *Client Secret*: This is a secret ID known only to the application and the authorization server. • *Scope*: • *Basic Authentication*: Allows you to connect to the endpoint using the username and password combination. • *User Name*: Enter the user name of the system you want to access. • *Password*: Enter the Password to access the system. **Note** Security Center does not support non-ascii characters in the password field.
Event Type	If you create a new external event subscription using the *Event Subscription Management* tool, by default, the *Event Type* is *External Event Alert V2*.

Parameter	Description
	If the subscriptions are migrated from *Event Notification Subscription* tool, then the *Event Type* will be set to the one existing in *Event Notification Subscription* tool.

5. Choose *Save*.

Results

You've successfully created an endpoint URL subscription.

Next Steps

You can manage existing event subscription using the *Event Subscription Management* tool. You can *Edit* a subscription or *Delete* a subscription that is no longer valid.

> **Note**
>
> - You can monitor the execution of integrations in *Execution Manager*.
> - You can manually retry failed events in *Admin Alerts*.
> - Subscriptions will not be copied from Source to Target during instance refresh.
> - A subscription will be deactivated if it fails continuously for six days. For deactivated subscriptions, it's recommended that you review the details and warning messages in *Execution Manager*. You can edit and save the subscription to reactivate it.

Related Information

Generating X509 Certificates
Execution Manager [page 36]
Tracking Errors and Viewing Status in Execution Manager [page 37]
Solving Admin Alerts [page 14]

12 Execution Manager

The *Execution Manager Dashboard* shows you the status of scheduled jobs and integrations to quickly identify and troubleshoot errors.

You can view the number of jobs and integrations that have occurred in the past twenty-four hours, seven days, or fifteen days and whether they resulted in success or error.

The Execution Manager logs are retained for a duration of 15 days, by default. Logs that are older than the retention period are automatically removed from the system.

Execution Manager is included as part of Next Gen Admin. It doesn't need to be enabled separately, but you do need to grant the appropriate permissions.

If there's an error, you can drill down to find more details to help you troubleshoot the error.

Granting Permission to Access Execution Manager

To view the Execution Manager dashboard or any of the corresponding admin home page tiles, you need to be granted permission.

The *Read Execution Manager Events* permission enables an administrator to access the main dashboard and view success/fail information. The *Read Execution Manager Payload* permission enables an administrator to view the data involved in a particular job or integrations, including user data, to assist in troubleshooting errors.

Scheduled Jobs Tab

You can view the status of recent jobs on the *Scheduled Jobs* tile on the *Admin Center* page.

On the *Execution Manager* page, you can select a time frame and see how many successful or failed jobs occurred during that timeframe. You can view the exact date and time of execution and other event details, to help you troubleshoot any errors.

Integration Center Tab

The integration center enables HR business analysts to build, deploy, and monitor simple file-based outbound integrations. You can build integrations quickly and easily through a guided workflow. Predefined templates are available and you can also create your own templates.

The Execution Manager shows you the status of custom integrations built in the integration center. You can view the status of recent outbound integrations on the *Integration Center* tile on the *Admin Center* page.

On the *Execution Manager* page, you can select a timeframe and see how many successful or failed custom integrations occurred during that timeframe. You can view the exact date and time of execution and other event details, to help you troubleshoot any errors.

Middleware Integrations Tab

Pre-Delivered Integrations Tab

When the endpoint is triggered for an event subscription which is created in *Event Subscription Management* or *Intelligent Services Center*, you can monitor the integration in *Execution Manager* under the *Pre-Delivered Integrations* tab. You can check using the name of the event subscription.

Along with external event integrations, you can also monitor other real-time integrations under the *Pre-Delivered Integrations* tab.

In the *Pre-Delivered Integrations* tab, the *Process Instance Name* is the *Subscription Name*, the *Process Definition Identifier* is the *Event Name*, and the *Process Definition Name* will always be *External Event Notification*.

Tracking Errors and Viewing Status in Execution Manager [page 37]
You can use *Execution Manager* to track errors or view the status of a scheduled job or custom integration.

Configuring Notifications to Users for Scheduled Jobs and Integrations [page 39]
You can configure notification that can be received for a particular state of scheduled jobs or integrations to internal or external users e-mail. You can create notification from *Execution Manager Dashboard*.

Creating Notifications to Logged In User for Scheduled Jobs and Integrations [page 40]
You can receive notification for a particular state of scheduled jobs or integrations to your e-mail. You can create notification from *Execution Manager Dashboard*.

12.1 Tracking Errors and Viewing Status in Execution Manager

You can use *Execution Manager* to track errors or view the status of a scheduled job or custom integration.

Prerequisites

You have the following permissions:

- *Read Execution Manager Events*
- *Read Execution Manager Event Payload or Event Report*.

Procedure

1. Go to *Admin Center* > *Execution Manager Dashboard*.
2. Select the tab that you're interested in monitoring.*Integration Center*, *Scheduled Jobs*, or *Middle Integrations*.
3. Click *Monitor*.
4. **Optional:** Select the number of days from the *Timeframe* dropdown, to view the number of jobs, and integrations that have occurred in the *Last 24 hours*, *Last 7 days*, *Last 30 days*.

   > **Note**
   >
   > You can also define a date range by selecting *Custom Date Range*.

5. **Optional:** Select the *Process Definition Identifier*.

> **Note**
>
> *Process Definition Identifier* can depend on the tab you select. For Example, In Integration Center you can find *Payroll*, *timesheetGenerated*, *timesheetSubmitted* as identifiers.

6. **Optional:** Select the *Process State*.

   > **Note**
   >
   > Process state can be *In Progress*, *Completed With Warning*, *Completed With Errors*, *Completed Successfully*, *Failed*, and *Unknown*.

   Based on the selection criteria, the data is retrieved for scheduled jobs or integrations.

7. Click the ⓘ *(Information)* icon for the corresponding Scheduled Job or Integrations, to know the summary of a desired data retrieved.

   Summary So Far dialog appears.

8. Click the › *(Right arrow)* icon next to the *Summary So Far* column for the corresponding Scheduled Job or Integration, to further drill down on the data retrieved.

   Event Details page opens.

   > **Note**
   >
   > The execution log details are available in *Event Details*. For *Pre-Delivered Integrations*, there is an automatic retry that happens for certain errors. If the event is successful after multiple retries, then the status will be updated in the same execution logs, or if it fails, the status will be updated to the same execution logs.

9. Click the link in the *Event Description* column for an event to know more details.

   > **Note**
   >
   > To download the event logs, click the ⬇ *(Download)* icon.

Task overview: Execution Manager [page 36]

Related Information

Configuring Notifications to Users for Scheduled Jobs and Integrations [page 39]
Creating Notifications to Logged In User for Scheduled Jobs and Integrations [page 40]

12.2 Configuring Notifications to Users for Scheduled Jobs and Integrations

You can configure notification that can be received for a particular state of scheduled jobs or integrations to internal or external users e-mail. You can create notification from *Execution Manager Dashboard*.

Prerequisites

Enable the *Read Execution Manager Events* and *Read Execution Manager Payload* permissions.

Procedure

1. Log on to the application.
2. Go to *Admin Center* > *Execution Manager Dashboard*.

   The *Execution Manager* page opens.
3. Click *MANAGE NOTIFICATION*.
4. Select the required tab. *Integration Center*, *Scheduled Job*, or *Middleware Integrations*.
5. Select the status that you want the user to be notified for scheduled jobs or integrations.

   > **Note**
   >
   > For *Middleware Integrations* you can select the status for *Integrations*, *PI Integrations* and *HCI Integrations*.
6. Enter the e-mail address of the user to whom you want the notifications to be received.
7. Turn on the switch next to the *Email* field.

Results

The user whose email ID is entered gets notified whenever the process reaches the selected state.

Task overview: Execution Manager [page 36]

Related Information

Tracking Errors and Viewing Status in Execution Manager [page 37]
Creating Notifications to Logged In User for Scheduled Jobs and Integrations [page 40]

12.3 Creating Notifications to Logged In User for Scheduled Jobs and Integrations

You can receive notification for a particular state of scheduled jobs or integrations to your e-mail. You can create notification from *Execution Manager Dashboard*.

Prerequisites

Enable the *Read Execution Manager Events* and *Read Execution Manager Payload* permissions.

Context

> **Note**
>
> The notification is received only to the logged in admin user. To create notification to other user see, **Configuring Notifications to Users for Scheduled Jobs and Integrations** in the **Related Information** topic.

Procedure

1. Log on to the application.
2. Go to *Admin Center* > *Execution Manager Dashboard*.

   The *Execution Manager* page opens.
3. Click *MANAGE NOTIFICATION*.
4. Select the required tab. *Integration Center*, *Scheduled Job*, or *Middleware Integrations*.
5. Click + *Create Notifications*.

   The *Create Notification* dialog opens.
6. Select the process type.

   > **Note**
   >
   > This step is applicable only for the *Middleware Integrations* tab.
7. Select the process state for which you require notifications.
8. Select the process from the *Process Definition Name*.
9. Click *Save*.

   The status to be notified for a selected process is added in the table below *Manage NOTIFICATION* page.

Results

You are notified whenever the process reaches the selected state.

Task overview: Execution Manager [page 36]

Related Information

Tracking Errors and Viewing Status in Execution Manager [page 37]
Configuring Notifications to Users for Scheduled Jobs and Integrations [page 39]
Configuring Notifications to Users for Scheduled Jobs and Integrations [page 39]

13 Integration Center

The Integration Center enables HR business analysts to build, run, schedule and monitor simple file-based outbound integrations. You can build integrations quickly and easily through a guided workflow. Predefined templates are available and you can also create your own templates.

The Integration Center must be enabled and configured separately. For more information, please refer to the Integration Center User Guide.

14 Integration Service Registration Center

Integration Service Registration Center is an application UI which allow you to register your instance/tenant to leverage the capabilities of services hosted on SAP Business Technology Platform. The application also securely stores your information such as client credentials, endpoint URL, and so on.

You can register for the following services on *Integration Service Registration Center* UI:

- *SAP Cloud ALM*
- *SAP Task Center*
- *Qualtrics*
- *Identity Provisioning Service*

> ⓘ Note
>
> Specific integrations within a subscription are deactivated if they fail continuously for six days. For the deactivated subscriptions, it's recommended that you review the details and warning messages in *Execution Manager*. You can edit and save the subscription to reactivate it.

Related Information

Registering your Tenant for an Integration Service [page 43]
Email Survey Integrations for Change in Employee Department

14.1 Registering your Tenant for an Integration Service

Register your tenant for services hosted on SAP Business Technology Platform.

Prerequisites

You must have *Administrator Permissions* > *Manage Integration Tools* > *Access to Integration Service Registration Center UI* permission enabled.

> ⓘ Note
>
> For the *SAP Cloud ALM* service, you also need to have *Metadata Framework* > *Admin Access to MDF OData API* permission enabled.

Procedure

1. Go to *Admin Center*.
2. In the search field, enter and choose *Integration Service Registration Center*.

   The *Integration Service Registration Center* page is displayed.
3. From the *Integration Service* dropdown list, choose a preferred service.

   Based on the selected service, corresponding user-input fields are displayed.
4. Enter the following details:

Parameter	Description
Destination URL	Enter the endpoint URL.
Authentication Type	Select the following authentication type from the dropdown: • *Certificate Based Authentication*: Authentication is established with the endpoint using X509 certificates. *X509 Certificates* can be selected from the dropdown list. **Note** • To access X509 certificates, you must have the *View* access to *Access to X509 Certificates* permission. You can choose only *External CA* and *SAP Cloud Root CA* X509 certificates. • To generate a new X509 certificate, select *Click to manage Authentication Keys*. For more information, refer to Generating X509 Certificates in the related information. • *Client Credentials*: Allows you to connect to the endpoint using the *Client ID* and *Client Secret* combination. • *OAuth URL*: The URL to get the access token. • *Client ID*: The authorization server issues the registered client, a client id - a unique string representing the registration information provided by the client. This is a mandatory field. • *Client Secret*: The *Client Secret* is a secret ID known only to the application and the authorization server.

5. Choose *Register*.
6. Choose *Ok*.

> **Note**
>
> To discontinue using a registered service, choose *Deregister*

Monitoring of some integrations can be done in *Execution Manager*.

Related Information

Generating X509 Certificates

15 Premium AI Features in SAP SuccessFactors

Premium AI focuses on AI-assisted capabilities that involve complex tasks, intelligent business insights, and measurable business outcomes.

Premium AI capabilities require purchasing of AI units license. All features using generative AI capabilities and Joule messages that exceed a customer's annual usage allocation are considered to be Premium AI.

> **Note**
>
> For information about the AI services available for use and the applicable capacity unit values, refer to SAP AI Services List.

> **Note**
>
> Using AI features may involve international transfers of Customer Data. For a current list of SAP SuccessFactors data center locations where Customer Data are transferred to use AI features, refer to SAP SuccessFactors Generative AI Availability. By enabling AI features, you acknowledge these transfers.

> **Note**
>
> For more information about the underlying architecture and services that support generative AI capabilities, refer to Generative AI on SAP BTP on the SAP Architecture Center.

Premium AI Features in SAP SuccessFactors

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Calibration	AI-assisted writing	Session reviewers can use the AI-assisted writing tool to improve the comments given to subjects. AI-Assisted Writing in Calibration	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
360 Reviews	AI-assisted writing	Employees can use the AI-assisted writing tool to generate comments or improve their comments, such as comments for skills, competencies, and performance and development goals. AI-Assisted Writing in 360 Reviews	SAP SuccessFactors AI-assisted writing	In the case of generating comments, AI uses a specific competency or skill and its rating as input by feedback providers, without needing users to provide initial text input. In the case of improving comments, the AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
360 Reviews	AI-assisted insights into Detailed 360 Reports	Users can gain synthesized insights into a Detailed 360 Report, including overall insights and attribute-specific insights. Assisted 360 Reviews Insights	SAP SuccessFactors AI-assisted people insights	For the overall summary, the input includes: attribute name, attribute description, overall ratings, attribute ratings, rating scales, overall comments, comments on all attributes and sections, rater category, and locale (that is, the language the user has selected to display their system). For the attribute specific feedback summary, the input includes: attribute name, attribute description, attribute ratings, rating scales, comments, and locale.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Opportunity Marketplace	AI-assisted writing	Employees can use the AI-assisted writing to improve the description of assignments when assignment owners create or edit assignments, and the comment of assignment applications when assignment applicants apply for assignments. The *Enhance Writing* action is enhanced to incorporate additional context to better help refine assignment descriptions. When assignment owners or co-owners use the updated *Enhance Writing* action, it now considers the following context in addition to the existing description text: • Assignment type • Assignment title • Job role defined for the assignment when job role is enabled for assignments • Attributes added for the assignment When the assignment type is configured with custom fields whose type is *Text Area,* the AI-assisted writing tool is also available when assignment owners edit those custom fields for assignments of that type	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This is the '' within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
		AI-Assisted Writing in Opportunity Marketplace Assignments		
Opportunity Marketplace	AI-assisted assignment creation	Assignment owners and co-owners can create assignments using AI capabilities. Enabling AI-Assisted Assignment Creation	SAP SuccessFactors AI-assisted Content Creation	The AI scenario uses the user-provided text within the AI-assisted goal creation experience to answer the question, What do you want to create? System grounding data used for this AI scenario includes the following: • Current date • Locale • Assignment type • Location name • Job role name
Opportunity Marketplace	AI-assisted skill inference	For customers that have enabled Talent Intelligence Hub and Growth Portfolio, assignment owners or co-owners can get AI-assisted skill recommendations during assignment creation or edit. The AI-assisted attribute recommendation only applies to skills. Enabling AI-Assisted Assignment Creation	SAP SuccessFactors AI-assisted Skill Inference	The AI scenario uses the user-provided text in the assignment description. Users can add a description explaining the assignment.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Continuous Performance Management	AI-assisted writing	Employees can use the AI-assisted writing tool to improve the content of their activities and achievements, meeting topics and notes, channel invitation notes, feedback, and feedback requests. The tool can also assists to make their feedback actionable. AI-Assisted Writing in Continuous Performance Management	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Career Development	AI-assisted writing	Employees can use the AI-assisted writing to improve the content of development goals and custom learning activities, such as name, description, and other content provided in fields of `text` and `textarea` types. AI-Assisted Writing	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Career Development	AI-assisted goal creation	Employees can create development goals using generative AI capabilities. Enabling AI-Assisted Goal Creation AI-Assisted Development Goal Creation Based on Roles and Interests	SAP SuccessFactors AI-assisted content generation	This AI scenario uses the user-provided text in the AI-assisted goal creation experience to answer the question, What do you hope to achieve? System grounding data used for this AI scenario includes the following: Current year, Date Format, Goal Template Start Date, Goal Template Due Date, Goal Milestones, Goal Explanation, and Locale. For data used by AI in creating development goals based on roles and interests, see AI-Assisted Development Goal Creation Based on Roles and Interests.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Career Development	AI-assisted career insights	Employees can gain insights into development actions they can take towards their current or target role using generative AI capabilities. AI-Assisted Career Insights	SAP SuccessFactors AI-assisted people insights	System grounding data used for this AI scenario includes the following: User Locale, Current Date, Competency Title, Level of Competency, Skill Title, Level of Skill, Current Role Title, Current Role Description, Target Role Name, Target Role Description, and Current Position Entry Date. Current Role Competencies: ID, Type, Name, Current Rating, and Expected Rating. Target Role Competencies: ID, Type, Name, Current Rating, and Expected Rating. Attributes in Growth Portfolio: ID, Type, Name, Current Rating, and Expected Rating.
Platform	AI-assisted writing	Employees can use the AI-assisted writing tool to improve self-descriptions in Profile Preview. AI-Assisted Writing in the Latest People Profile	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Learning	AI-assisted writing	Learning administrators can use the AI-assisted writing tool to improve the Title and Description fields when creating Items, Curricula, Programs, and Collections. AI-Assisted Writing in Learning	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Goal Management	AI-assisted writing	Employees can use the AI-assisted writing tool to improve the content of performance goals, such as goal name, description, and other content provided in goal fields of `text` and `textarea` types. AI-Assisted Writing	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Compensation	AI-assisted writing	Compensation planners can improve the content of Notes and Force Comments for the Compensation and the Total Compensation worksheets and Executive Review. Administrators can improve the content of the fields in the column designer when designing Compensation and Total Compensation templates.	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Variable Pay	AI-assisted writing	Compensation planners can improve the content of Notes and Force Comments for the Compensation Planner in your Variable Pay plans and Executive Review. Administrators can improve the content of the fields in the column designer when designing the Variable Pay plans.	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Reward and Recognition	AI-assisted writing	Employees can improve the messages to award recipients and approvers. Administrators can improve the descriptions of programs, levels and categories for awards. Employees can generate a message to recipient based on the **Program**, **Company Level**, and **Award Level** and their descriptions. AI-Assisted Writing in Rewards and Recognition	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Talent Intelligence Hub	AI-assisted writing	Improve the description for an attribute and the description for a proficiency level scale. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Performance Management	AI-assisted writing	Employees can use the AI-assisted writing tool to improve the content provided as comments, such as comments for skills, competencies, and performance and development goals. It can also help improve the email draft for requesting feedback in Team Overview. AI-Assisted Writing in Performance Management	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Employee Central	AI-assisted compensation insights	Managers can generate insights into an employee's compensation as well as talking points to guide discussions about compensation. Generating Compensation Insights	SAP SuccessFactors AI-assisted compensation insights	System grounding data used for this AI scenario includes the following: Compensation Information: Start Date, Notes, Event Reason Name, Currency, Yearly Base Salary, Prorated Max Point of Pay Range, Prorated Min Point of Pay, Range, Prorated Mid Point of Pay Range, Pay Range, Pay Grade, and Compa Ratio. Job Information: Start Date, Job Classification, Pay Grade, Job Entry Date, Position, Position Entry Date, Hire Date, Job Title, Position Title, and Original Start Date. Performance Management: Performance Rating and Section from Performance Management form, Performance Rating Scale. **Note** The system does not use any identifiable employee data when generating the insights.
Employee Central	AI-assisted writing	Users can use the tool to improve comments they provide when initiating or processing a workflow request. Note that this feature is not available for Foundation Object (FO) and MDF workflows.	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Onboarding	AI-assisted writing	Employees can use the AI-assisted writing tool to improve the content of the Welcome message, Farewell message, Buddy messages, Nudge Assignee Quick Action on the home page, Nudge button in new hire tasks on the New Hire Details page, and the goals for the new hire Goal Plan. AI-Assisted Writing in Onboarding	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Recruiting	AI-assisted job description enhancement	Recruiters can generate job descriptions using generative AI capabilities. Enhancing Job Description with AI	SAP SuccessFactors AI-assisted content generation	This AI scenario reads standard fields from the original job requisition. Customers can configure the Recruiting fields from the AI-Enhanced Job Description Metadata Framework object to use other specific job requisition fields as a reference source for AI to generate an enhanced job description.
Recruiting	AI-assisted interview questions generation	Interviewers can generate interview questions based on the job description using generative AI capabilities. Generating Interview Questions	SAP SuccessFactors AI-assisted content generation	This AI scenario reads data from the original job description.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Recruiting	AI-assisted skills validation for job applicants	Job applicants can add and manage their skills on the career site. This assists recruiters in gaining a better understanding of the applicant's skill set and how it aligns with the job requirements. Adding Skills in a Job Application Using AI	SAP SuccessFactors AI-assisted Applicant Screening	Applicant skills are extracted from the resume using AI capabilities. The job applicant can then refine the extracted set of skills by searching, adding, or removing some of the skills.
Recruiting	AI-assisted skills matching for applicant screening	By gaining visibility into the applicant's skills and how they align with the job requirements, recruiters and hiring managers can make informed decisions during the applicant screening and hiring process. Viewing Skills Compatibility for an Applicant in Applicant Management	SAP SuccessFactors AI-assisted Applicant Screening	Job skills are extracted from the job description and applicant skills are extracted from the resume using AI capabilities.
Recruiting	AI-assisted job skills on career sites	Candidates visiting your career site can use their resume to find jobs that match their skills. Extracting Skills from Job Descriptions with AI	SAP SuccessFactors AI-assisted job skills on career sites	Job skills are extracted from the job description and applicant skills are extracted from the resume using AI capabilities.
Recruiting	AI-assisted skills validation for job requisitions	Recruiters can categorize a job's critical skills and hire candidates who best fit the job based on skill match. Validating Skills in a Job Description	SAP SuccessFactors AI-assisted Applicant Screening	This AI scenario uses job skills, which are extracted from the job description using AI capabilities.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Goal Management	AI-assisted goal creation	Users can create personal performance goals and team goals using generative AI capabilities. Enabling AI-Assisted Goal Creation	SAP SuccessFactors AI-assisted content generation	This AI scenario uses the user-provided text in the AI-assisted goal creation experience to answer the question, What do you hope to achieve?. System grounding data used for this scenario includes the following: Current year, Goal Template Start Date, Goal Template Due Date, Goal Milestones, Goal Explanation, and Locale.
Talent Intelligence Hub	AI-assisted skills architecture creation	Organizations can use AI-assisted capabilities to set up a skills library in Talent Intelligence Hub by extracting skills from job profiles in Job Profile Builder. Overview of AI-Assisted Skills Architecture Creation	SAP SuccessFactors AI-assisted Skill Architecture Creation	Data from job profiles in Job Profile Builder and job requisitions in Recruiting.
Platform	AI-assisted writing	You can use the AI-assisted writing tool to improve the description for the text fields in *Manage Data* and *Manage Configurable UI* pages. **Note** The AI-assisted writing feature is enabled for text fields with a minimum 256 characters.	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Learning	AI-assisted skills inference for learning	You can create skills inference requests for items and programs to infer skills and ratings from their title and descriptions using AI. Creating Skills Inference Requests for Items and Programs	SAP SuccessFactors AI-assisted skill inference	The AI scenario uses titles and descriptions of learning items and programs to infer skills.
Learning	AI-assisted ratings for inferred skills	Leveraging generative AI capabilities, you can extract ratings for skills inferred through the "AI-assisted Skills Inference for Learning" feature. Enabling AI-Assisted Skills and Skill Ratings for Learning		The AI scenario uses titles and descriptions of learning items and programs to infer skill ratings.
Talent Intelligence Hub	AI-assisted skill inferencing from Continuous Performance Management data	Talent Intelligence Hub can use AI-assisted capabilities to infer and recommend skills to employees in their Growth Portfolio using Continuous Performance Management data. Recommending Skills Based on Continuous Performance Management Data	SAP SuccessFactors AI-assisted skill inference	The AI scenario uses the inputs provided by users in the Achievements, Activities, or Feedback sections of Continuous Performance Management.
Talent Intelligence Hub	AI-assisted skills identification from resume	Employees can upload the resume in the Growth Portfolio and use the AI-assisted capabilities to identify skills from the resume. Employees can then add the identified skills to the Growth Portfolio. Adding Skills from Resume Using AI	SAP SuccessFactors AI-assisted skill inference	The AI scenario uses the resume uploaded in the Growth Portfolio to identify skills from it.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Platform	AI-assisted Microsoft Teams app chat	Users can interact with the SAP SuccessFactors app in Microsoft Teams to initiate HR transactions or view personal data using natural language through a built-in AI engine. Enabling AI-Assisted Microsoft Teams App Chat	SAP SuccessFactors AI-Assisted Microsoft Teams App Chat	The AI scenario uses the user-provided text in the message input field within the SAP SuccessFactors app in Microsoft Teams.
Platform	AI-assisted writing	Employees can use the AI-assisted writing tool to improve the name and description of a team or a team objective, the description of a key result, and comments on a key result. AI-Assisted Writing in Dynamic Teams	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
360 Reviews	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing in 360 Reviews	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Career Development	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Compensation	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Continuous Performance Management	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing in Continuous Performance Management	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Employee Central	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Goal Management	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Learning	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing in Learning	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Onboarding	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing in Onboarding	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Opportunity Marketplace	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing in Opportunity Marketplace Assignments	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Performance Management	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing in Performance Management	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Platform	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Reward and Recognition	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing in Rewards and Recognition	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Talent Intelligence Hub	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Variable Pay	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
360 Reviews	AI-assisted writing (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. AI-Assisted Writing in 360 Reviews	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Career Development	AI-assisted writing (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. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Compensation	AI-assisted writing (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. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Continuous Performance Management	AI-assisted writing (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. AI-Assisted Writing in Continuous Performance Management	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Employee Central	AI-assisted writing (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. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Goal Management	AI-assisted writing (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. AI-Assisted Writing	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Learning	AI-assisted writing (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. AI-Assisted Writing in Learning	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Onboarding	AI-assisted writing (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. AI-Assisted Writing in Onboarding	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Opportunity Marketplace	AI-assisted writing (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. AI-Assisted Writing in Opportunity Marketplace Assignments	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Performance Management	AI-assisted writing (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. AI-Assisted Writing in Performance Management	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Platform	AI-assisted writing (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. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Reward and Recognition	AI-assisted writing (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. AI-Assisted Writing in Rewards and Recognition	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Talent Intelligence Hub	AI-assisted writing (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. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Variable Pay	AI-assisted writing (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. AI-Assisted Writing [page 78]	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input

Succession Planning	AI-assisted successor insights	Succession planners can gain insights into the successors that are nominated for a position or an incumbent.
		AI-Assisted Successor Insights
			SAP SuccessFactors AI-assisted people insights	System grounding data used for this AI scenario includes the following:
				• Skills and competencies that are associated with the position for the underlying role
				• Information about successors that includes:
				  • Job information, including the working experience
				  • Skills and competencies
				  • `futureLeader` flag
				  • The latest overall performance rating from Performance Management forms

Succession Planning	AI-assisted successor recommendation	Succession planners can view a reference list of potential successors who are recommended based on their skills, competencies, and work experience. AI-Assisted Successor Recommendation	AI-assisted successor recommendation	This AI scenario uses the following customer data: • Position-related job families, job roles, and job profiles in Job Profile Builder • Skills and competencies in the Growth Portfolio • Job information and external work experience in People Profile

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Employee Central Payroll	AI-assisted explain pay	Employees can use the AI-assisted explain pay tool to ask questions to help them understand their pay statement. AI-Assisted Explain My Pay Statement	Explain Pay	This AI scenario uses the following customer data: • Gross Pay • Net Pay • Benefits such as company car, stock options, health or pension plans • Allowances paid by companies • Travel-specific items
Performance Management	AI-assisted performance insights	Managers can gain insights into employees' performance in the latest experience of Performance Management forms. AI-Assisted Performance Insights	SAP SuccessFactors AI-assisted people insights	Continuous feedback received by the employee and visible to the manager: • Feedback Topic • Feedback Responses per Question • Feedback Questions Manager 1:1 Meeting Notes CPM Achievement Name Performance Form Comments by others Overall comment from each section Single comment for each rating item: goal, competency, skill, and behavior Comments received through 'Ask for Feedback' function

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Recruiting	AI-assisted interview feedback insights	Recruiters and hiring managers can generate and view comprehensive insights from interview feedback for a candidate. Generating Interview Feedback Insights	SAP SuccessFactors AI-assisted people insights	Assessments of skills and competencies, overall comments, notes, skill-specific feedback, and the final recommendation. Additional context fields are used by default if the data is present at the job level or candidate level: • job_req_title • job_req_description • job_req_locale • job_req_locale • candidate_current_role • candidate_locale • interviewer_name • interviewer_department • interviewer_locale • interviewer_role
Learning	AI-assisted image generation	Allows Learning administrators to generate images while creating learning content. Enabling AI-Assisted Image Generation	AI-assisted Image Generation	System grounding data used for this AI scenario includes the user-provided image description in the Description field.
Localization	Bulk Translate	Users can use AI to translate predefined content from a source language into one or multiple target languages. Bulk Translate	AI-assisted Translation	Input includes specified content on UI (such as field labels, field values, and notes), initial AI translations, and customer-edited AI translations; specified source locale; specified target locales.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Localization	Extended AI Locales	Users can use AI to translate default English UI labels into languages not preloaded in the system. They can review and edit individual translations before approving the AI-generated locale for use. Extended AI Locales	AI-assisted Translation	Input includes default English UI labels (including messages), specified target locale.
360 Reviews	AI-assisted sentiment analysis for Detailed 360 Reports	Through sentiment analysis, reviewers can gain insights into the sentiment behind raters' feedback on 360 Reviews forms to better understand employee performance.	AI-assisted Sentiment Analysis	The input includes: attribute name, attribute description, attribute ID, and comments.
Platform	AI-assisted writing	Users can use the AI-assisted writing tool to easily fill in required text areas while completing supported quick actions in Microsoft Teams. AI-Assisted Writing in Microsoft Teams	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Platform	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing in Microsoft Teams	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Platform	AI-assisted writing (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. AI-Assisted Writing in Microsoft Teams	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Platform	AI-assisted writing	Users can use the AI-assisted writing tool to easily fill in required text areas while completing supported quick actions in SAP SuccessFactors Work Zone. AI-Assisted Writing in SAP SuccessFactors Work Zone	SAP SuccessFactors AI-assisted writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Platform	AI-assisted writing (translation)	Translates the written text into the target language chosen by the user. AI-Assisted Writing in SAP SuccessFactors Work Zone	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.
Platform	AI-assisted writing (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. AI-Assisted Writing in SAP SuccessFactors Work Zone	SAP SuccessFactors AI-assisted advanced writing	The AI scenario uses the user-provided text in the text areas or fields where AI-assisted writing is available. This text is referred to as the selected text within the AI-assisted writing experience.

Module	Feature	Description	Applicable AI Service in SAP AI Services List	Customer Data Used as Input
Onboarding	AI-assisted Information Extraction	Automates the information extraction process for National IDs during the onboarding process.	Document Data Extraction	The AI scenario uses the new hires National ID information. The National ID data is extracted by SAP Document AI and is imported into the system. This extraction occurs when a new hire uploads a copy of their National ID as part of the Personal Data Collections step, or by the hiring manager during the New Hire Data Review step.

Related Information

Data Protection and Privacy

15.1 Base AI Features in SAP SuccessFactors

Base AI focuses on AI capabilities that are available for free in your SAP SuccessFactors applications.

Base AI Features in SAP SuccessFactors

Module	Feature	Description
Platform	AI-assisted skills standardization	Organizations can use AI-assisted capabilities to use the industry-standard skill names for all skills within the Attributes Library. **Note** The feature involves skills inference capabilities and is available only when you've enabled a premium AI feature through the purchase of an AI units license. However, using the **AI-assisted skills standardization** feature doesn't consume any AI units. For information about the AI units license, please contact your Account Executive. Enabling the AI-Assisted Skills Standardization Setting
Opportunity Marketplace	Intelligent Opportunity Recommendations	Take advantage of machine learning to improve assignments and open job recommendations in Opportunity Marketplace. Enabling Intelligent Recommendations in Opportunity Marketplace

Module	Feature	Description
Learning	AI-assisted skills association for Open Content Network Items	You can use the AI-assisted capabilities to associate skills with Open Content Network (OCN) items based on the predefined skills provided by the OCN providers. **Note** The feature involves skills inference capabilities and is available only when you've enabled a premium AI feature through the purchase of an AI units license. However, using the **AI-assisted skills association for Open Content Network Items** feature doesn't consume any AI units. For information about the AI units license, please contact your Account Executive. Associating Skills With Open Content Network Items Using AI
Learning	Personalized Recommendations	Powered by the machine learning technology of SAP AI Business Services, personalized recommendations are generated to users, in the *Personalized Recommendations* section, on the new Learning home page. Personalized Recommendations on the New Learning Home Page
Career Development	Career Explorer	Powered by machine learning technology, Career Explorer recommends career opportunities to employees based on the career paths of people who are similar to them in the organization. Career Explorer

Note

For the full and up-to-date list of Joule Base use cases, refer to All Use Cases Supported in Joule and set the **Commercial Model** column in the search table to **Base**.

Related Information

Premium AI Features in SAP SuccessFactors [page 46]

15.2 AI-Assisted Writing

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.

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 79]

15.3 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 [page 81]

15.4 Viewing the AI Usage Acknowledgment Statement

Learn how to find the AI usage acknowledgment statement after accepting the acknowledgment as a one-time activity to use AI-assisted features.

Context

If AI-assisted features are enabled in your SAP SuccessFactors application, an acknowledgment message is displayed when users choose any AI-assisted capability. This message informs users about the possible inaccuracies of the results generated by AI systems and recommends them to review all AI-generated content before completing their work.

Once users accept the acknowledgment as a one-time activity, the message doesn't reappear in subsequent sessions when they engage with AI-assisted features across any SAP SuccessFactors application. However, if the acknowledgment statement is revised at any point later, the acknowledgment message will be displayed again. Users must review and accept the updated acknowledgment statement before they can continue using any AI-assisted feature.

> **Note**
>
> A proxy user can accept the AI usage acknowledgment on behalf of another user (account holder).

Users can view their previously-accepted acknowledgment statement by selecting the *AI Usage Acknowledgment* option from their user profile menu.

Procedure

1. Choose your profile avatar at the top of any page in your SAP SuccessFactors application to access your user profile.
2. Choose *AI Usage Acknowledgment*.

Related Information

Data Protection and Privacy
Proxy Access

15.5 Accessing the AI Services Administration Page

AI Services Administration is the single point of access for setting up and managing AI-assisted features in your SAP SuccessFactors applications.

Prerequisites

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

> **Note**
>
> Some AI features may be available for trial under promotions and do not require an AI units license. These promotional features can be enabled from the *Promotions Feature Settings* section on the *AI Services Administration* page.

Procedure

1. Go to Admin Center.
2. Type *AI Services Administration* in the tool search box on the Tools tile.

   The search results filter and narrow as you type.
3. Select *AI Services Administration* from the tool search results.
4. Once you are on the *AI Services Administration* page, enable the AI feature you want to use.

   > **Note**
   >
   > Using AI features may involve international transfers of Customer Data. For a current list of SAP SuccessFactors data center locations where Customer Data are transferred to use AI features, refer to SAP SuccessFactors Generative AI Availability. By enabling AI features, you acknowledge these transfers.

15.6 Reviewing Consumption Summary of AI Units

You can review and track the AI units consumption insights across all premium AI features enabled in your SAP SuccessFactors applications.

Prerequisites

- You have the *AI Services Administration* permission.
- You have enabled premium AI features.
- You have access to *SAP for Me*.

> **Note**
>
> This capability is available only for customers who purchased SAP AI Classic (SKU 8018592) or SAP AI Per-user, Per-month (SKU 8019164). For more information, please contact your Account Executive.

Context

The consumption of AI units is metered based on the usage of premium AI features.

Procedure

1. Go to *Admin Center* > *AI Services Administration*.
2. In *Business AI Consumption Dashboard*, choose the *AI Units Consumption Dashboard* link.

Results

The link takes you to the *SAP for Me* support portal. You can gain insights about:

- Your current balance of AI units.
- A summary detailing the consumption of AI units by each premium AI feature.
- The number of AI units approaching their expiration date.

Related Information

Premium AI Features in SAP SuccessFactors [page 46]

How to Access SAP for Me

15.7 User Feedback on AI Features

The User Feedback feature lets users provide real-time feedback on AI-assisted outputs in SAP SuccessFactors. Users can rate AI-generated content and add optional comments, helping refine AI-driven features over time.

Why Feedback Matters

AI-generated content continuously evolves based on user input. By collecting and analyzing feedback, SAP SuccessFactors can improve AI accuracy, relevance, and usability, ensuring it better supports business needs.

Beyond improving individual AI responses, user feedback helps identify broader trends and areas for refinement. Patterns in ratings and comments provide valuable insights into recurring issues, allowing SAP SuccessFactors to enhance AI-assisted processes, refine system prompts, and improve user experience over time.

Key Components for Feedback Collection

- **Thumbs Up and Thumbs Down Ratings**: Users can quickly show whether AI-assisted content is helpful by selecting a thumbs up for positive feedback or a thumbs down to highlight issues.
- **Reasons for Thumbs Down**: If a user chooses thumbs down, they can select from multiple reasons like "Inaccurate Information," or "Off Topic" to clarify why the response did not meet their needs.
- **Optional Comments for Extra Detail**: Users can enter free-text comments to provide further context. This additional input helps SAP SuccessFactors identify patterns and make targeted improvements.

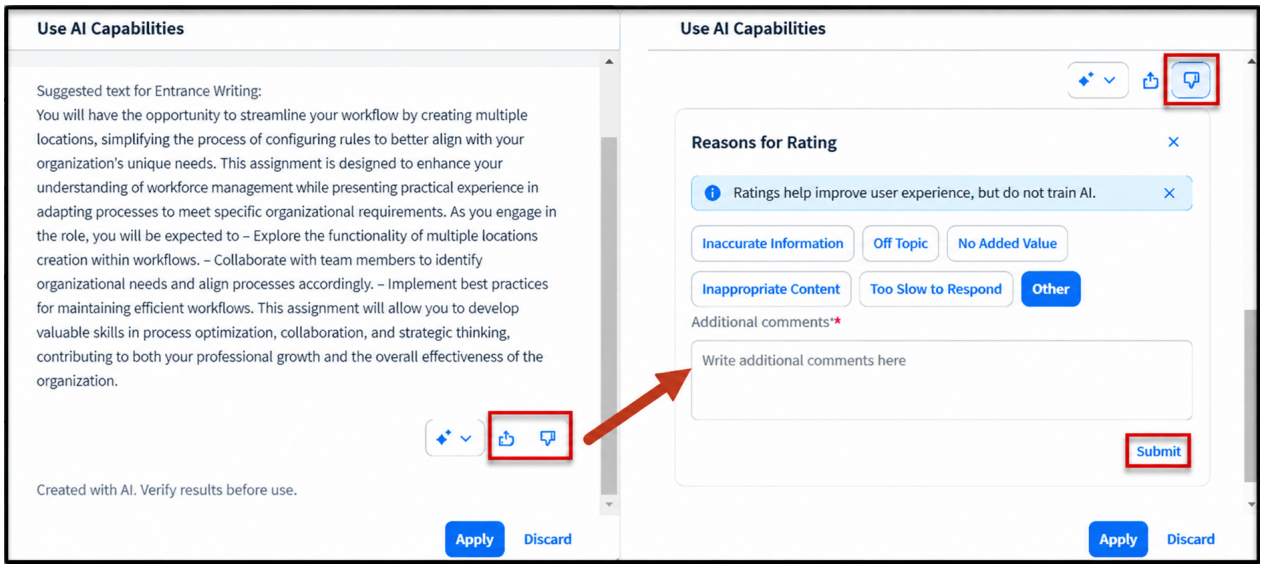
How Feedback is Used

To continuously enhance AI-generated content, submitted feedback may be analyzed to identify patterns, improve features and functionalities, and refine user experience. Feedback may also help optimize AI-generated responses by assessing trends in thumbs-down ratings and reviewing selected reasons or comments where applicable.

> **Note**
>
> While user ratings enhance the overall user experience, User Feedback is not used to train the AI system but instead for improvements in the application, user experience, and prompt engineering.
>
> Feedback data are not tied to Customer Data, and we do not have information about which user provided the feedback. Additionally, users should avoid including personal or sensitive data in the free-text fields.

How To Provide Feedback

1. Interact with AI-assisted content (for example, enhance a job description, or translate text)
2. Select thumbs up or thumbs down to indicate your satisfaction with the response.
3. If selecting thumbs down, choose one or more reasons to explain why.
4. Optionally, provide additional comments for further context.
5. Click *Submit* to share your feedback with SAP SuccessFactors.


Use AI Capabilities
Suggested text for Entrance Writing:
You will have the opportunity to streamline your workflow by creating multiple locations, simplifying the process of configuring rules to better align with your organization's unique needs. This assignment is designed to enhance your understanding of workforce management while presenting practical experience in adapting processes to meet specific organizational requirements. As you engage in the role, you will be expected to – Explore the functionality of multiple locations creation within workflows. – Collaborate with team members to identify organizational needs and align processes accordingly. – Implement best practices for maintaining efficient workflows. This assignment will allow you to develop valuable skills in process optimization, collaboration, and strategic thinking, contributing to both your professional growth and the overall effectiveness of the organization.
Created with AI. Verify results before use.
Apply
Discard
Use AI Capabilities
Reasons for Rating
Ratings help improve user experience, but do not train AI.
Inaccurate Information
Off Topic
No Added Value
Inappropriate Content
Too Slow to Respond
Other
Additional comments*
Write additional comments here
Submit
Apply
Discard

16 Document Grounding for AI-Assisted Use Cases

You can ground Joule with your documents in Microsoft SharePoint repositories as a source of truth, and add document metadata to improve the accuracy of Joule responses using the *Manage Document Grounding* page.

Metadata Management for Employee Central Service Center Policies

You can connect your HR policy documents and add metadata to the documents, enabling Joule to deliver more personalized and contextualized answers using user profile data (such as location, country/region/region/region, legal entity, and more). Go to Adding Metadata to Your HR Policy Documents [page 86] to learn more.

Metadata Management for Explain Pay Statement

You can manage document grounding for the AI-assisted use case *Explain Pay Statement* on the *Manage Document Grounding* page, enabling Joule to provide answers using the user's payroll data and documents that are relevant to the user's query. Go to Adding Metadata to Pay Statement Documents [page 93] to learn more.

17 Adding Metadata to Your HR Policy Documents

You can connect your HR policy documents within `Microsoft SharePoint` and **Google Drive** and add metadata to the documents, enabling Joule to deliver more personalized and contextualized answers using user profile data (such as location, country/region, legal entity, and more).

Prerequisites

- Ensure that the following requirements are met when the *SAP AI service of Document Grounding* is enabled:
  - The integration is set up between the Document Grounding Service and your selected data repository.
    - For information about the integration between Document Grounding Service and Microsoft SharePoint, see Setting Up Data Repository Integration With Microsoft SharePoint.
    - For information about the integration between Document Grounding Service and Google Drive, see Setting Up Data Repository Integration With Google Drive.
  - You've set up the content ingestion pipeline.

    > → Remember
    >
    > If you're a new customer, create a new data pipeline for ingesting documents. For more information, see Set Up Content Ingestion
    >
    > If you're new customer, you need to first enable and configure the *Agent Knowledge Sources* feature. For more information about the configuration, refer to Adding Metadata for Agent Knowledge Documents. Enabling this feature creates a Document Grounding Service pipeline in the *SAP AI service of Document Grounding* for ingesting documents. Then, follow the setup in the **Procedure** section to configure Ask HR Policies feature, which uses the existing pipeline instead of creating a new one. For more information on the setup, refer the blog post Joule - Document Grounding with Contextualization (aka Metadata to your Documents) - Setup Guide – 2.
    >
    > If you're an existing customer, Document Grounding is metered monthly based on the predefined usage metric — **records**. As the usage is metered each month, we recommend deleting your existing pipeline at the end of the current billing cycle and creating a new one at the beginning of the next cycle. It helps you avoid additional charges and maintain business continuity.

  - You've configured the Document Grounding parameters, such as the `pageSize` parameter set to `100` in the Generic Secrets for Contextualization and the `dataRepositoryMetadata` parameter with `"value": "sfsf" and "key": "lob"`. For more information, see Generic Secrets for Contextualization with Metadata and Create a Pipeline with Microsoft SharePoint

    > {·} Sample Code
    >
    > Here's a sample code snippet for configuring `dataRepositoryMetadata`.

    ```
    ...
    "metadata": {
    ```

```
    "dataRepositoryMetadata": [
        {
            "key": "lob",
            "value": [
                "sfsf"
            ]
        }
    ]
}
...
```

- Ensure that you've registered your application to communicate with SAP SuccessFactors HCM Suite with OpenID Connect. Setting Up the Communication with SAP SuccessFactors
- You have the *Administrators* > *Manage AI Capabilities* > *Manage Document Grounding* permission.
- You've enabled the policies option on the *AI Services Administration* page. For more information, see Accessing the AI Service Administration Page [page 81].
- Users have the *View* permission for the *Metadata* fields used in the document metadata from *Manage Permission Roles* > *[choose a role]* > *Employee Data*.
- You have the *Position* permission. For more information, see Creating a New Object Definition

> → Remember
>
> If you're a non-Employee Central customer, ensure that you have the *Admin access to MDF OData API* permission. For more information, see Permissions for MDF OData API Entities

Context

You can connect your HR policy documents (such as country/region-specific and role-specific policies, user guides, and other relevant materials) stored in your data repository to ground Joule's responses using the content as the source of truth. You can define standard and custom metadata fields, and associate relevant metadata to provide employee-specific context in Joule responses.

Procedure

1. Go to *Admin Center* > *Manage Document Grounding*.
2. The policies feature is selected by default.
3. Choose the repository from which you want to connect documents.

Data Repository	Description
Microsoft SharePoint	Choose this option to add metadata to your HR policy documents within Microsoft SharePoint.
Google Drive	Choose this option to add metadata to your HR policy documents within Google Drive.

Data Repository	Description
	Note Documents from both personal and shared drives within Google Drive can be connected.

4. If you've selected *Microsoft SharePoint*, fill out the form with the following details. Otherwise, you can skip this step.
   a. In the *SharePoint Site ID / Site Name / Site URL* field, enter the ID, name, or URL of the Microsoft SharePoint site that you want to connect to.

      Note
      Only one Microsoft SharePoint site can be connected.

   b. In *Client ID*, enter the Azure App Registration application ID used for authentication.
   c. In *Client Secret*, enter the secret key associated with the Client ID for secure access.
   d. In *Azure Tenant ID*, enter the identifier of your Azure Active Directory tenant.

      Note
      Microsoft SharePoint documents are ingested into the Document Grounding Service, configured specifically for your tenant within SAP SuccessFactors.

   e. Choose *Connect*.
      The site is connected.
5. If you've selected *Google Drive*, fill out the form with the following details:
   a. In *Shared Drive Name / Drive ID*, enter the ID or the name of the drive you want to access.
   b. In *Client ID*, enter the OAuth client ID associated with the Google Cloud application used for authentication.
   c. In *Client Email*, enter the email address of the Google service account used to access Google Drive.
   d. In *Project ID*, enter the project ID that contains the service account used for the integration.
   e. In *Private Key*, enter the private key associated with the service account.
   f. In *Private Key ID*, enter the identifier of the private key associated with the service account.
   g. Choose *Connect*.
      The drive is connected.
6. In the *Map User Data Fields*, you can map each *Metadata* field to a corresponding field in the SAP SuccessFactors data model.

   Note
   The mappings for user data field are applied across all connected repositories–Microsoft SharePoint and Google Drive–for consistent and accurate responses.

   User data field mapping is important for policies because it enables Joule to understand each user's context when responding to user questions based on your HR policies. Any changes made to the mapping after the initial setup can affect the existing user context data, resulting in inaccurate responses from Joule. If you want to change the existing mappings, it's recommended that you review and update the document metadata for all your documents after the change.

   - If the metadata field corresponds to a standard field in Employee Central, it's automatically mapped to the default field defined in the data model.

- If the metadata field corresponds to a custom field in Employee Central, no default mapping can be determined. In this case, the field is set to *Unable to map*, and you must manually select the appropriate field from the dropdown based on your requirements.
  For more information about supported Employee Central standard fields and custom fields (custom01 through custom15 fields) for *Metadata* mapping, see the **Related Information** section.

7. Choose *Save*.
8. Choose *Add Documents* to tag each document with metadata to describe its applicability.

> **Note**
>
> Metadata fields set to *Unable to map* during user data field mapping aren't displayed on the *Add Documents* page.

A list of policy documents within your data repository is displayed.

9. To ingest any document changes made in your data repository after the initial setup, for example, adding new documents or deleting existing documents, into Document Grounding Service, choose *Trigger Document Ingestion* on the *Step 1 of 2: Select File* page.
   This process automatically assigns default metadata during ingestion to newly added documents and removes deleted documents along with their associated metadata, including their default metadata. The deleted documents are no longer displayed in the *Documents* list. Additionally, you can view one of the following labels of each document to identify the metadata status:
   - *Default Metadata*: Indicates that default metadata has been added to the document.
   - *Manually Tagged*: Indicates that metadata has been added or updated manually.
   - (no label): Indicates that metadata including default metadata has been deleted.

> **Note**
>
> Processing time in Document Grounding Service depends on the number of document changes. For example, processing 5,000 new documents from SharePoint may take a minimum of 25 minutes, while processing the removal of deleted documents from Google Drive may take a minimum of 10 minutes. After triggering the ingestion, you can refresh the page periodically to view incremental updates to the document labels as processing progresses. For subsequent document changes to be ingested into Document Grounding Service, wait at least 2 hours before triggering document ingestion again.
>
> To synchronize documents and their metadata into Document Grounding Service, refer to Trigger the Document Grounding Service pipeline manually and KBA 3679918.

10. Select the documents for which you want to add the metadata.

    You can select up to 25 files at a time.
11. In the *Tags* dropdown, choose the tags for each document metadata according to your preference.

> **Note**
>
> A document can only be tagged with one AI use case. If you want to use the same document for both *Explain Pay Statement* and policies, we recommend you copy the document in different folders within the same Microsoft SharePoint instance.

12. Choose *Add*.
13. **Optional:** If you want to delete metadata from a document, select the document and choose *Delete Metadata*.
14. If you want to update metadata for a document, select the document and choose *Edit Metadata*.

Results

Document Grounding is configured for policies. The document metadata along with documents are ingested into Document Grounding Service.

Next Steps

Use the related Pipeline API endpoints to get the current Document Grounding status. For more information, see Get Pipeline Status

Read the blog in the **Related Information** section for detailed setup information about "Document Grounding with Contextualization".

Related Information

Supported Metadata for User Data Field Mapping [page 90]

Joule - Document Grounding with Contextualization (aka Metadata to your Documents) - Setup Guide – 2

17.1 Supported Metadata for User Data Field Mapping

Metadata fields support both standard and custom fields from Employee Central. You can map these fields to SAP SuccessFactors data model fields so Joule can deliver employee-specific answers to HR policy questions.

Supported Standard and Custom Fields from Employee Central

- Depending on the hard-coded or customized HRIS Sync mapping configurations, the *SAP SuccessFactors Data Model Field* dropdown lists the available *Employee Profile* fields configured from *Manage Business Configuration* > *Employee Profile* > *Standard*. These fields include the standard fields and the 15 custom fields (custom01 through custom15).
- All custom fields (custom01 through custom15) can be enabled through custom HRIS Sync mapping from *Manage Business Configuration* > *Employee Central* > *HRIS Sync Mappings*.

For more information on the HRIS sync mapping configurations, refer to KBA 2172427 and Custom HRIS Sync Mappings.

Standard Fields	Custom Fields
Country	*Pay Grade*

Standard Fields	Custom Fields
Location	*Cost Center*
Division	*Employee Type*
Department	*Full-Time/Part-Time Employee*
Job Title	*Business Unit*
Job Code	*Employee Class*
Contingent Worker	*Company*

→ Remember

- If you are an Employee Central customer, the *SAP SuccessFactors Data Model Field* dropdown displays all supported standard fields and custom fields (custom01 through custom15) configured through HRIS custom sync mapping.
- If you are a non-Employee Central customer, the *SAP SuccessFactors Data Model Field* dropdown allows mapping to the supported standard fields and custom fields (custom01 through custom15); however, the dropdown doesn't list the HRIS custom mappings for Foundation Objects and Generic Objects.
  For more information about the supported fields , refer to KBA 3679918.

Important Considerations for User Data Field Mapping

- Only Foundation Objects, Generic Objects, picklist, boolean, and string data types are supported.

  ⓘ Note

  Foundation Objects, Generic Objects, and boolean fields support localization. String fields do not support localization, therefore, if multiple languages are required, you must manually add document metadata values for each language. For picklist fields, ensure that they are correctly configured to match the user's locale. If the locale mapping is missing or incorrectly set, the picklist values will display as blank or null.

- The standard fields *country*, *location*, *department*, *division*, *isContingentWorker*, and *jobCode* appear only when the visibility is set on the *Manage Business Configuration* page. For more information, see Field Level Configuration.
- The standard field *job-title* appear for user data field mapping only when you run the *Synchronize Business Configuration* job and enable the fields on the *Manage Business Configuration* page. For more information, see Field Level Configuration and Synchronize Business Configuration Job in Scheduled Job Manager.
- The custom fields *employee-type*, *is-fulltime-employee*, *company*, *employee-class*, *pay-grade*, *cost-center*, and *business-unit* appear for user data field mapping only when you enable the fields on the *Manage Business Configuration* page and add the custom HRIS sync mappings. For more information, see Custom HRIS Sync Mappings.
- ⚠ Caution

  Don't disable any metadata fields that are used in the user data field mapping from the *Manage Business Configuration* page. Disabling these fields can disrupt the user data field mapping. However, if the fields are disabled, you can either:

- re-enable it, or
- Update the mapping by choosing *Unable to map* or choosing the appropriate data model field for mapping.

Related Information

Adding Metadata to Your HR Policy Documents [page 86]

18 Adding Metadata to Pay Statement Documents

You can manage document grounding for the AI-assisted *Explain Pay Statement* use case on the *Manage Document Grounding* page, enabling Joule to provide answers using the user's payroll data and documents that are relevant to the user's query.

Prerequisites

Before using *Manage Document Grounding*, make sure that the following prerequisites are met:

- You've migrated the SAP SuccessFactors Identity Authentication Service app to OpenID Connect (OIDC). For more information, refer to Register Your Own Application to Communicate with SAP SuccessFactors HCM Suite with OpenID Connect.
- The steps in Setting Up the Communication with SAP SuccessFactors [page 95] are completed.
- Microsoft SharePoint is configured. For more information, refer to Integrating Joule with SAP Solutions (EAC).
- You have the *Administrators* > *Manage AI Capabilities* > *Manage Document Grounding* permission.
- *Explain My Pay Statement* is enabled in the Premium AI Features in SAP SuccessFactors [page 46] and for Employee Central Payroll based on SAP Human Capital Management for SAP S/4HANA.

Context

Administrators use the *Manage Document Grounding* UI to perform the following tasks:

- Connect to existing documents within Microsoft SharePoint, grounding Joule responses with documents as a source of truth.
- Add and update metadata to documents, allowing Joule to retrieve information accurately and efficiently. As the first AI-assisted feature, *Explain My Pay Statement* for SAP SuccessFactors Employee Central Payroll uses document grounding.

Procedure

1. Go to *Admin Center* > *Manage Document Grounding*.
2. Choose the *Explain Pay Statement* AI use case from the dropdown.
3. In *SharePoint Site ID / Site Name / Site URL*, specify the ID, name or URL of the Microsoft SharePoint site that you want to connect to.

> **Note**
>
> Only one Microsoft SharePoint site can be connected.

4. In *Client ID*, specify the Azure App Registration application ID used for authentication.
5. In *Client Secret*, specify the secret key associated with the Client ID for secure access.
6. In *Azure Tenant ID*, specify the identifier of your Azure Active Directory tenant. Microsoft SharePoint documents are ingested into our RAG system, configured specifically for your tenant within SAP SuccessFactors

> **Note**
>
> Microsoft SharePoint documents are ingested into our RAG system, configured specifically for your tenant within SAP SuccessFactors.

7. Choose *Connect*.
   The site is connected. Note that the data is saved once it's connected.
8. Choose *Add Metadata* to tag each document metadata to describe its applicability. These tags help the system retrieve the most relevant documents based on the user's profile and query.
   A list of documents stored in your SharePoint are displayed.
9. Select the file and choose *Next*.

> **Note**
>
> You can add metadata to only one file at a time.

10. In the *Legal Entity* dropdown, choose the company entity that the document applies to. You can select multiple entities if needed.
11. **Optional:** In *Valid From* and *Valid To*, define the start and end date for the document's applicability.
12. In the *Country/Region* dropdown, choose the countries/regions relevant to the document. You can select multiple countries/regions.
13. Choose *Add*.

Results

Document Grounding is configured for the AI-assisted use case *Explain My Pay Statement*.

18.1 Setting Up the Communication with SAP SuccessFactors

Prerequisites

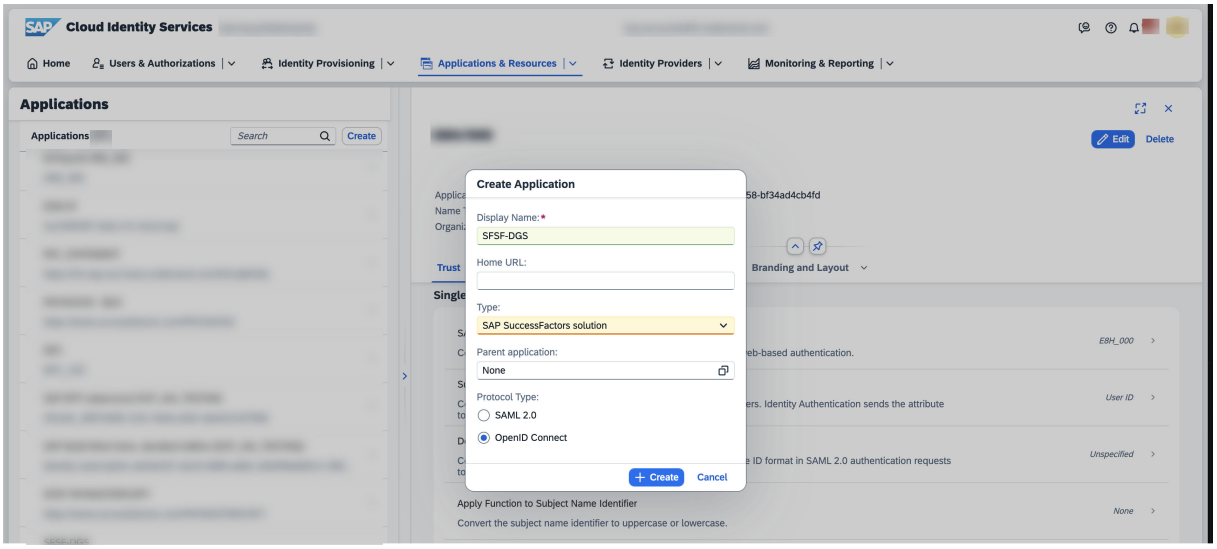
- As an administrator, you have access to Identity Authentication Service to provide secure authentication and single sign-on for SAP SuccessFactors users.
- You've migrated the SAP SuccessFactors Identity Authentication Service app to OpenID Connect (OIDC). For more information, refer to *Related Information*.

Context

Here's an overview of the required steps to configure the authentication for Document Grounding Service with SAP SuccessFactors.

Procedure

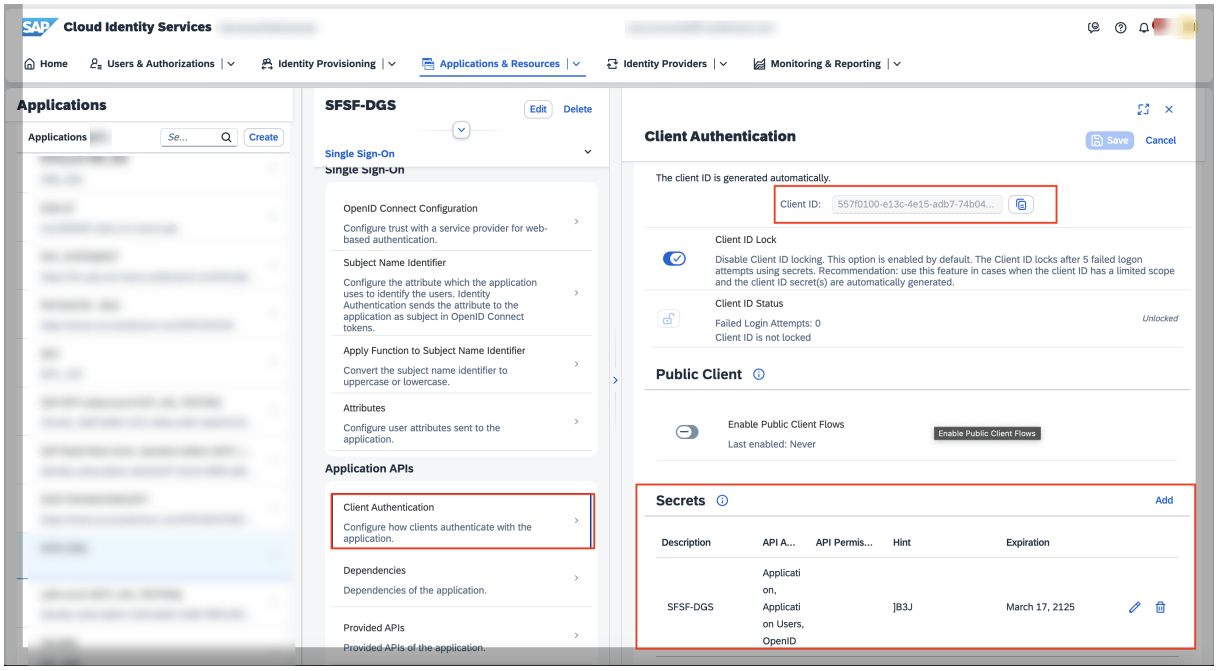
1. Log on to your *Identity Authentication Service* system.
2. Select *Applications & Resources*.
3. Select *Applications*.
4. Select *Create* a new application.



5. Save.
6. Go to *Client Authentication*.

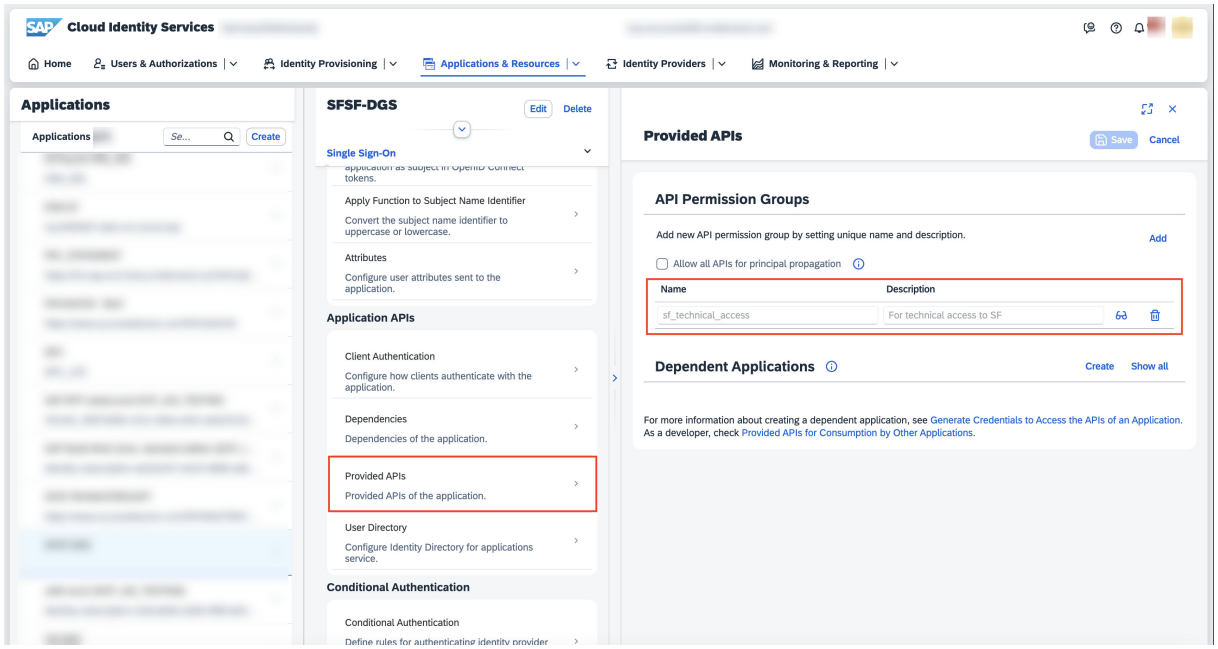
The *Client ID* is automatically generated.

Configure the *Client Secret* as shown in the following screenshot:



7. Go to *Provided APIs*.

   Set up the technical access.

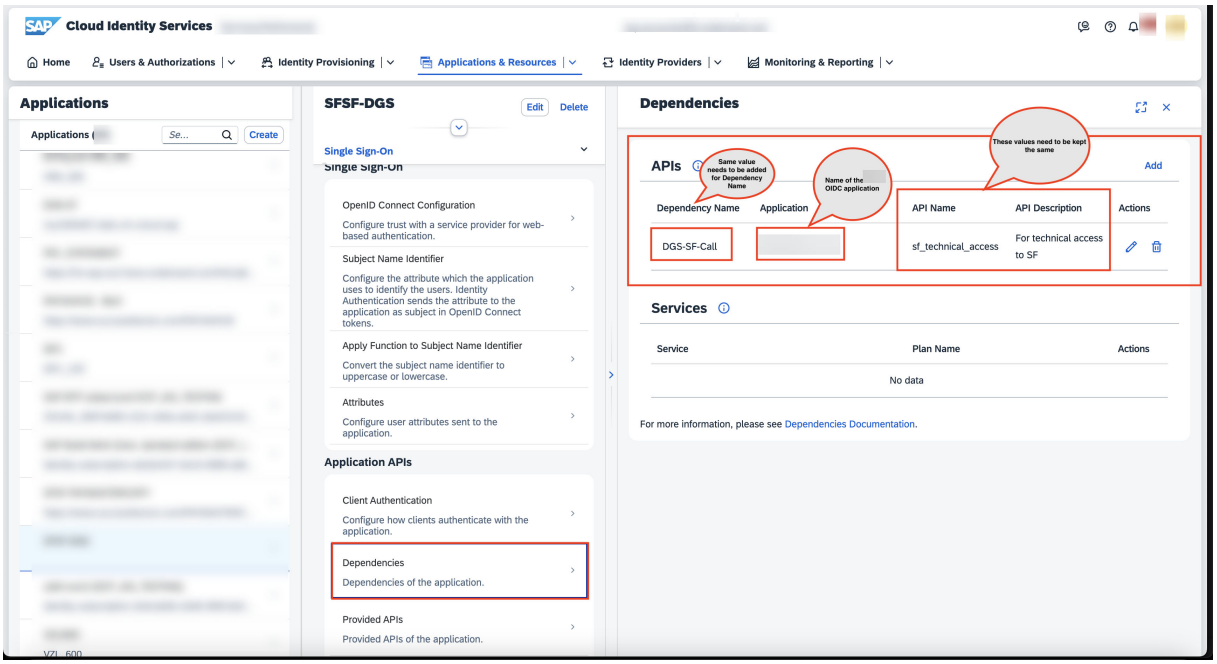


8. Save.
9. Go to *Dependencies*.

   Make the following settings.

   - Specify **`DGS-SF-Call`** in the *Dependency Name* field.
   - Specify the relevant application.

- Select the relevant API.



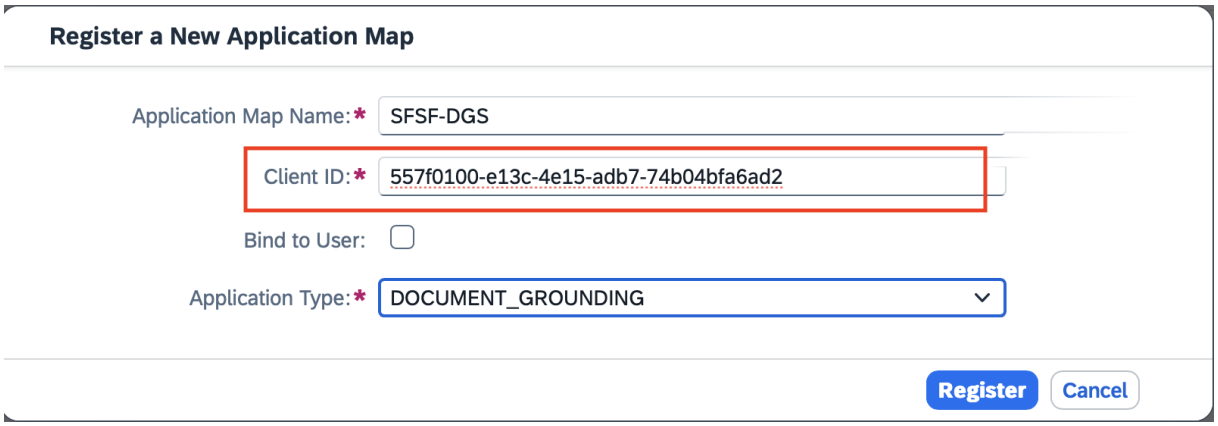
If the SAP SuccessFactors OIDC application doesn't show up, it means that the SAP SuccessFactors Identity Authentication Service app isn't on OIDC and must be migrated. For more information, refer to *Related Information*.



10. Save.
11. Sign in to your SAP SuccessFactors system to register the created client as an OIDC application.
12. [Prerequisite] Make sure that the Admin users have the *Manage Security* and *Manage Application Security Features* permissions.

    For a new Admin user, you must define the related permission group and permission roles in RBP to grant this permission to the user. For more information, refer to Introduction to Using RBP.
13. Go to the *Security Center* to register the app as OIDC Client.
14. Select *Register*.

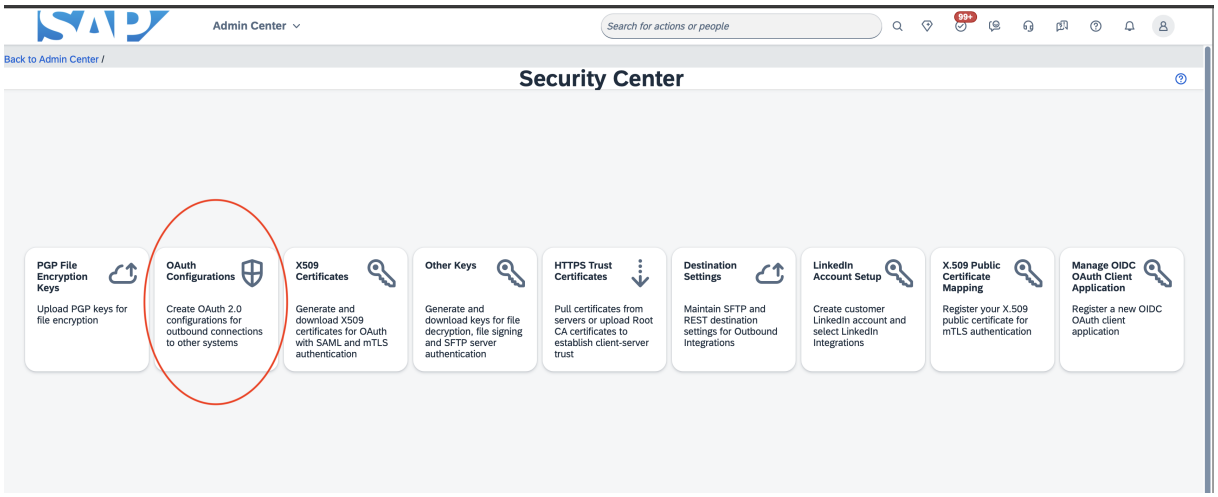
    Provide the same client ID as in step 6 and specify **`DOCUMENT_GROUNDING`** in the *Application type* field.



15. Save.

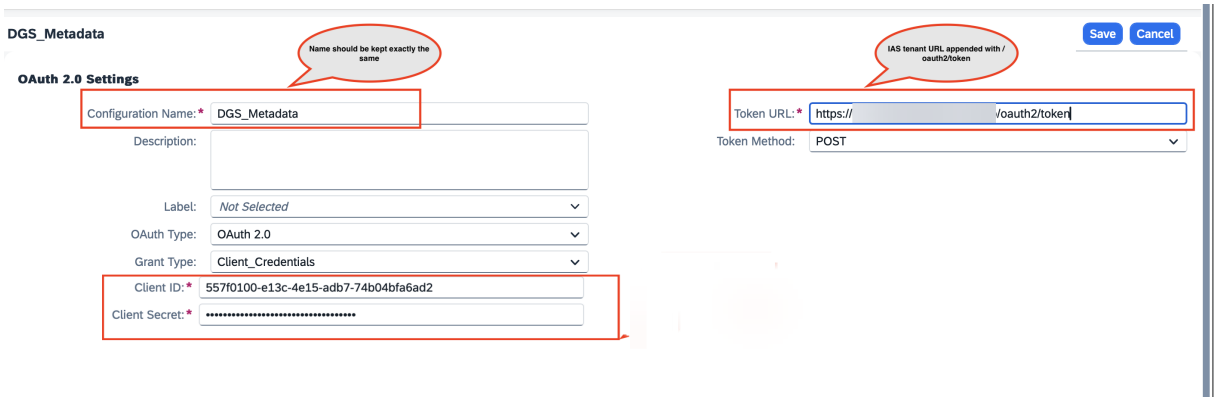
    The *Document Grounding* App is registered.

16. Select *Oauth Configurations* in the *Security Center*.



17. Select *Add*.

    Provide the following information.



> **Note**
>
> In the *Configuration Name* field, specify **`DGS_Metadata`** as it's case-sensitive.

> **Note**
>
> Enter the *Client Id* and *Client Secret* defined in step 6.

Results

You've configured the communication for document grounding with SAP SuccessFactors.

Related Information

Register Your Own Application to Communicate with SAP SuccessFactors HCM Suite with OpenID Connect

19 Manage Data Storage

Use *Manage Data Storage* to check the data usage in your instance.

Prerequisites

You have *Admin Center Permissions* > *Access Manage Data Storage* permission.

Context

Data presented in *Manage Data Storage* is updated weekly on the weekend.

Procedure

1. Go to *Admin Center* > *Manage Data Storage*.
2. View total data usage and view distributions by data type or by module.
3. Use the purge buttons to clear up storage space.
   - The purge button in the *Distribution by Data Type* section directs you to *Auto Data Purge* where you can configure to purge *Documents* and *Audit Data*.

     > **Note**
     >
     > This button is only available when you have access to *Data Retention Management*.

   - The purge button in the *Distribution by Modules* section directs you to *Manual Data Purge* where you can set up purge requests to purge module data.

     > **Note**
     >
     > This button is only available when you have the *Manage Data Purge* > *Create DRTM Data Purge Request* permission.

Related Information

Configuring Auto Data Purge
Purging Specific Types of Data with DRTM

19.1 Data Included in Different Data Types

Find out what data is included in different data types in *Manage Data Storage*.

Data Type	Source Module/Product	Details
Documents	Performance & Goals Compensation Career Development Recruiting Succession Planning Employee Central Onboarding 1.0 Platform	The data reflects documents stored in the HANA database. **Note** If you find no document data here, go to *Manage Documents* to check documents stored outside of HANA.
Forms	Performance & Goals Compensation Recruiting Succession Planning	This data type refers to forms used in these modules.
Audit Data	Metadata Framework Employee Central Platform Recruiting	This data type refers to audit data generated in these modules. Read Audit and Change Audit of sensitive personal data isn't included.
Scheduled Jobs	N.A.	This data type refers to system data generated throughout the process of scheduled jobs.
Photos	Employee Central Career Development Platform	This data type refers to photos or images used in Company Organization Chart, People Profile, and Career Development Planning.
Uncategorized	We only categorize data from top 20 data tables in HANA across all data centers. The uncategorized type covers data in the rest of HANA data tables in you instance.	

Related Information

Using Document Management
Using Company Organization Chart

20 Reports Tile

The *Reports* tile enables you to run ad hoc reports directly from the admin homepage.

In the Admin Center, the *Reports* tile is visible to anyone with the *View or access Reports tile* permission.

The reports available to you on the *Reports* tile are the same reports that are available to you on the *Ad Hoc Reports* tab in the SAP SuccessFactors Reporting module.

> **Note**
>
> The Login Count report on the Admin homepage counts the number of HTTP connect sessions, which is a close number to real user login. While the Login report on the *Ad Hoc Reports* tab in the SAP SuccessFactors Reporting module represents the real login number, which is more accurate. Please note that there might be slight difference between the two reports.

21 Release Center

The Release Center is an administrator tool that helps you manage software releases from SAP SuccessFactors.

The Release Center downloads changes that concern SAP SuccessFactors from the What's New Viewer to the Release Center in Admin Center. Each change that it downloads is called an **Article**. After it downloads all changes, it works to surface the changes that matter to you.

> ⓘ Note
>
> The What's New Viewer remains in the Help Portal. You can still use it to subscribe to changes, to send article URLs to colleagues who don't have access to Admin Center, and to save your own favorite filters.

Tenant Aware Filtering

The Release Center filters the list of articles to the articles that affect you either because they concern something that is enabled in your tenant or because they're so important that everyone should see them.

For example, if you have Learning enabled in your system, you'll see Learning articles. Learning articles are any that have Learning listed as one of the products affected by the change the article is describing. If an article affects Learning and Performance and Goals, for example, and you have Performance and Goals enabled but not Learning, **you will still see the article** because it lists Performance and Goals.

Some articles, and some modules, are so important that all customers should see them. For example, we show you Platform changes because they can affect multiple products and we want you to check them. Foundation changes are likewise critical, so we'll show them to you.

Impact Score

The What's New Viewer used fields like Enablement and Action to show you the work you must do to get value and the action we recommend to avoid disruption. The Release Center reads these values, and others, to create an impact score. The impact score makes risk to your system more visible.

Collaborative Features

In the Release Center, you can assign articles to colleagues, set status on articles, and comment on articles. Use the collaborative features to keep track of your workflow. For example, you can assign an article to Mary for investigation, Mary can put it in progress, add comments to describe her findings, discuss it with you in a meeting, enable it, and then set it to a completed status.

21.1 Enabling Release Center

Release Center is an admin tool that helps you manage the changes that come in SAP SuccessFactors releases.

Prerequisites

Look up the permission roles that contain the administrators who should have access to the Release Center.

Procedure

1. Go to *Manage Permission Roles*.
2. Search for **`Release Center`**.
3. Assign the permissions that you need for your team.

> **Note**
>
> The background job that loads the What's New content into Release Center requires you to select *Release Center Object Permissions*, even if you don't want to set object-level permissions.

Next Steps

Most customers have a small team of administrators who manage the releases and need access to release **information**. They're OK sharing comments, assignments, status values, and the **public** content from the SAP Help Portal content database. Most customers, therefore, enable *Release Center Object Permissions* so that the data loads, but they ignore the individual object-level permissions. If you are among the few companies need object-level control, however, you can set them in *Release Center Object Permissions*.

> **Caution**
>
> If you change object-level access, test it thoroughly with your team to make sure they can still do their jobs with the access you've given them. SAP SuccessFactors has curated the fields to help administrators do their change management jobs.

Related Information

Release Center Permissions in Role-Based Permissions (runs search of table for "Release Center")
All Role-Based Permissions

21.2 Exceptions to Tenant Awareness in the Release Center

Although the Release Center is **generally** tenant aware, there are some exceptions.

When we filter articles in the Release Center, we do it to reduce the volume of articles you must process. We're aware, however, that we can take the filtering too far: we can hide articles that you **should** see regardless of your tenant or we can accidentally hide articles that **do** apply to your tenant. We're aware of the tension and decided to take a conservative approach. We want to prove to ourselves - and you - that we can get it right before we start hiding content that you should see.

You can see content that doesn't apply to you if:

- A change is so important that we think you should always see it. For example, if we change foundation objects and mark the change with **Foundation Management**, we want to show it to you. Foundation changes are important.
- A change affects a majority of our customers, even if it doesn't affect you. For example, most of our customers use localization features, so if we make changes and mark the change with **Localization**, we show it to you, regardless of whether you have localization turned on or not. Additionally, localization changes can affect your default language - usually U.S. English. Localization is too important for **most of our customers** to hide.
- We aren't confident in our ability to read whether something is enabled in your system. SAP SuccessFactors is a complex suite of individual products with intertwined configuration. When we look at a complex configuration, we can decide it's better to show it than hide it. For example, AI features often span products, modules, and features and connect into SAP Joule.

21.3 Use the Download Button in the Release Center for Snapshots not Workflows

The *Download* *Download* button in release center is good to capture a **snapshot** of the current state of Release Center, but is a bad practice in your workflow.

When you download content from the Release Center, you download a Microsoft Excel document as a **snapshot** of the articles at the moment you download them. A snapshot could be a good idea to save the state of your work at a point in time. You can, for example, use the *Download* *Download* button to take a snapshot of your team's **original** assignments to remember them as they were before you **reassign** articles to load balance your teams' work.

Avoid using downloads as part of your workflow because you miss updates to the Release Center. You miss updates that **we** make and updates that **you** make.

- **Changes we make**: If you download a snapshot, and then an article changes - including a change to the products it affects - you miss that update in your snapshot.
- **Changes you make**: If some administrators add comments in Release Center and others add comments in the offline spreadsheet, you must merge the comments and risk losing important information.

> → Tip
>
> At the end of any release, on or near the production date, download your articles to take a snapshot. It's especially important for **your** data, like **your** status. For example, if you download status in 1H, in May, then in

October, you can look at all 1H articles with a "not interested" as part of your 2H process. You can ask, in 2H: "Looking at all the articles that we weren't interested in during our 1H process, are we interested **for our 2H process**?" The same is true for any status: you want, for example, a list of articles you left in progress and that you completed.

21.4 Release Center Article Status

In SAP SuccessFactors, an article status expresses where you're in the process of understanding individual articles. You set them and you manage them.

SAP SuccessFactors provides a number of article status values for the Release Center, and each represents your position on the article as an answer to a question:

- Is the article new and you haven't seen it yet?
- Are you progressing toward understanding and implementing it?
- Have you implemented it (completed it)?
- Have you understood the article, but you're not interested in implementing it?

If you track your answers with *Status*, you can filter by your answers:

- How many articles are **new** that we must start processing?
- How many articles are **in progress**, and is that number getting smaller?
- How many articles have we enabled or understood according to our internal processes? How many have we **completed**?
- How many articles did we look at and decided that we're not interested at this time?

→ Tip

At the end of any release, on or near the production date, download your articles to take a snapshot. It's especially important for **your** data, like **your** status. For example, if you download status in 1H, in May, then in October, you can look at all 1H articles with a "not interested" as part of your 2H process. You can ask, in 2H: "Looking at all the articles that we weren't interested in during our 1H process, are we interested **for our 2H process**?" The same is true for any status: you want, for example, a list of articles you left in progress and that you completed.

21.5 Release Center Article Assignments

Use Release Center Article assignments to assign responsibility for investigating and enabling the changes described in the articles and to find articles assigned to members of your team.

When you assign an article, you assign the work of the article. The work usually includes research into the article, matching articles that describe the same feature or change, and recommending action. Some teams assign the **adoption** work to another team or another administrator.

→ Tip

To assign an article, select it, select who you want to assign it to from the assignment list, and then look up the user who you want to assign it to. It's a good practice to self-assign, so click *Assign to Me*.

Responsibilities of Assignment

SAP SuccessFactors can store your assignments, but you decide what it means to have an assignment. When most customers assign an article, the assignee is responsible for some combination of the following:

- Investigating the subject of the article to understand the impact to your organization or company, which can include:
  - Looking at the linked sources in the article to find additional information
  - Searching SAP for Me for more information
  - Attending webinars or watching recordings to learn more about major features
  - Checking the community for discussions among other customers
- Searching for similar articles to make a batch of changes: often an article describes a part of a change that has relationships to other articles. For example, a new feature can replace an old one, so the assignee can check the deprecation topic for the old feature that SAP SuccessFactors is deprecating **and** new feature that SAP SuccessFactors is releasing.
- Making a recommendation on the change. Your organization or company can have a set of recommendations, such as **Adopt**, **Watch for Gap Closure**, **Investigate Later**, and so on. The assignee's job can be to determine the recommendation.
- Enabling the change in the system, if the decision is to enable it.
- Track the change into future releases and decide when it's ready to adopt.

Prioritize Self-Assignment

Although one administrator can assign articles to other administrators, assignment works best when all administrators use *Assign to Me*. It gives each administrator full visibility into what they're taking responsibility for. Consider an assignment meeting where everyone on your team opens the Release Center and then uses filters to assign batches of articles to themselves. For example, you can have a meeting where:

- Someone responsible for learning administration selects Learning in the Product list, skims the title and description of the list, and then selects all the articles that they should own. They can click *Assign to Me* to take the assignments.
- You repeat the assignment for other administrators. For example, administrators who own Goals can filter by the Goals Module or administrators who are responsible for the Performance and Goals product **as a whole** can select the Product Performance and Goals. All administrators self-assign their responsibility areas.
- At the end of the meeting, filter the list to unassigned articles by selecting *Unassigned* in the *Assignee* filter. Discuss the list and assigning to the right person.

Assignment Rules and Conditions

In the Release Center, you can assign articles to administrators under these rules and conditions:

- The assignee must have access to the Release Center - must have the right workflows. If you don't see a user in the assignment list, they don't have access to Release Center. Go to Role Based Permissions and assign the right permissions.
- You can only assign one article to one assignee (you can't assign more than one person to the article)
- Assignment doesn't add or remove new interactions or create or remove permissions. Someone who **isn't** assigned an article has the same abilities to act on the article as someone who is assigned to the article, if the two have the same workflows in role-based permissions.

Related Information

Release Center Permissions in Role-Based Permissions (runs search of table for "Release Center")

22 SAP Companion in SAP SuccessFactors

SAP Companion provides context-sensitive in-app help for the SAP SuccessFactors HCM suite. To open SAP Companion, choose the (help) icon in the page header.

Related Information

Learn More About SAP Companion
Standard Content Scenario for SAP Companion
Setup of SAP Companion for SAP SuccessFactors

22.1 Starting a Guided Tour Automatically

Configure a guided tour to start automatically so that users always see the tour when they land on the page.

Prerequisites

You have access to the *Admin Center*.

Context

Currently, there's no option for individual users to dismiss the guided tour dialog after completing it. It means that the next time a user lands on the page, the tour will start again automatically.

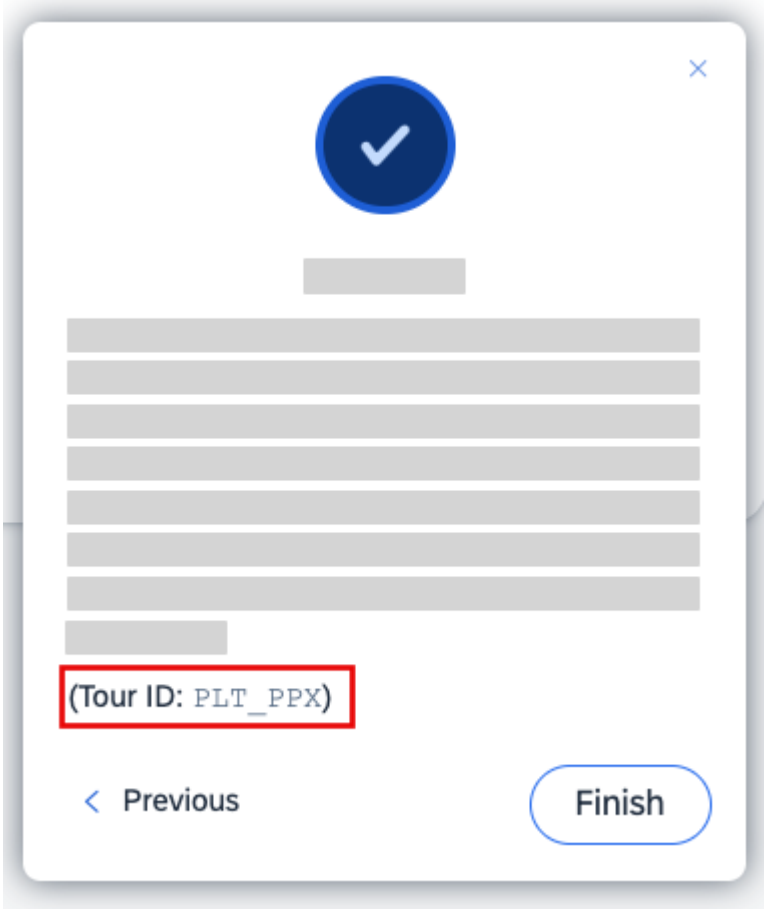
> **Note**
>
> The following steps apply to standard SAP Companion content only.

Procedure

1. Go to *Admin Center* > *SAP Companion Integration Settings*.

2. Under *SAP Companion* > *Parameters*, add a new parameter `autoStartTour={tour-ID}`.

   You can find the tour ID in the last step of the guided tour. Here's an example:



3. Save the change.

Related Information

Auto Start for Guided Tours

23 Security Center

Security Center allows you to create and manage keys, certificates and configurations that can be used in integrations.

> **Note**
>
> To access Security Center, you must have enabled access to any one of the tiles from *Manage Security Center*.

For more information, please refer to the *Security Center* documentation on the SAP Help Portal

Related Information

Security Center

24 Upgrade Center

You can use the Upgrade Center to learn about and apply important opt-in upgrades and legal changes.

You can read about each upgrade, view screenshots and videos, and learn about feature prerequisites and permissions required to perform the upgrade.

If you're interested in an upgrade but not ready to adopt it immediately, you can flag it as saved it for later and share a link with colleagues to get feedback.

Some updates can be easily undone with one click, directly in Upgrade Center. For upgrades with the *Undo* option, you typically have up to 30 days to undo the upgrade.

> → Remember
>
> To perform an upgrade, you often need to have a specific role-based permission. Having access to the Upgrade Center page itself **doesn't** allow you to perform all of the available upgrades. You can only perform an upgrade if you have the appropriate permission. If you don't have permission, you can read about the feature, but you can't perform the upgrade.

> ⚠ Caution
>
> Not all upgrades require a specific permission. If no permission is required, anyone with access to the Upgrade Center can perform the upgrade.

24.1 Controlling Access to Upgrade Center

If you choose, you can control who has access to the Upgrade Center page using role-based permission.

Prerequisites

- You have *Platform Feature Settings* permission.
- You have the ability to manage role-based permission roles.

Context

By default, access to the Upgrade Center page itself **isn't** controlled by role-based permission and can be accessed by anyone with access to Admin Center. If you want to restrict access to specific administration roles, you need to enable that capability first.

→ Remember

To perform an upgrade, you often need to have a specific role-based permission. Having access to the Upgrade Center page itself **doesn't** allow you to perform all of the available upgrades. You can only perform an upgrade if you have the appropriate permission. If you don't have permission, you can read about the feature, but you can't perform the upgrade.

⚠ Caution

Not all upgrades require a specific permission. If no permission is required, anyone with access to the Upgrade Center can perform the upgrade.

Procedure

1. Go to *Admin Center* > *Platform Feature Settings*. Then, select the *Restrict Upgrade Center Access* setting and save the change.
2. Go to *Admin Center* > *Manage Permission Roles*. Then, grant *Manage Upgrade Center* permission to the appropriate role.

Results

Now, only people in the appropriate permission role can access the *Upgrade Center*.

Related Information

Upgrade Center [page 112]

24.2 Accessing the Upgrade Center

You can access the Upgrade Center in a number of ways.

From the Admin Center, you can:

- Use action search to access the Upgrade Center directly from the global search box.
- Use admin tool search to access the Upgrade Center from the admin homepage.

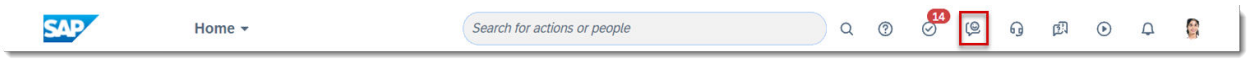
25 Product Feedback

Product Feedback provides an in-application way for users to provide feedback on our software so that we can collect their needs more rapidly and easily.

The Product Feedback feature is enabled by default, but can be turned off. User feedback enables us to continually improve our software. Product feedback surveys help us gather such feedback.

On some pages where we specifically want to gather feedback, we periodically prompt users to take a product feedback survey when they visit the page, about 3–5 times a year. On all pages, the survey can be launched with an icon in the page header.

To launch the survey, choose (Give Product Feedback) in the page header.



Product Feedback in Page Header

Related Information

Preventing Product Feedback to SAP SuccessFactors [page 114]

25.1 Preventing Product Feedback to SAP SuccessFactors

By default, users can send SAP SuccessFactors survey responses so we can improve our software based on their product feedback. You can disable the product feedback survey to prevent users from providing feedback.

Procedure

1. Go to *Admin Center* > *Company System and Logo Settings*.
2. Select *Disable Product Feedback in Page Header*.

   The feedback button disappears from the global page header. Users can't provide feedback to SAP SuccessFactors through product surveys.
3. Save.

Next Steps

You can restore the product feedback button later. Follow the same steps but clear *Disable Product Feedback in Page Header* to enable feedback.

Related Information

Product Feedback [page 114]

26 Tenant Preferred Time Zone

Tenant preferred time zone is one of the time zones used in the system to present date and time information on the UI.

Different time zones are used in the system to present date and time information based on business scenarios, including logged in user time zone, browser time zone, tenant preferred time zone, and UTC time zone.

In places where the default server time zone was used, the tenant preferred time zone is used to allow customers to configure their tenants without affecting the underlying infrastructure.

You can find out your tenant preferred time zone at *Admin Center* > *Platform Feature Settings*. The tenant preferred time zone is now used in the following places:

Module	Feature	Date/Time Info	What's Changed
Employee Central	Time Management		All dates and time (except the *lastModifiedOn* and *createdOn*). Business Rules in Time Management use today's date as per the Tenant Preferred Time Zone. For example, *Period-End-Processing* or *Interim Time Account Update* in the rule scenario. We use the tenant preferred time zone to determine the effective valid rule and to resolve associations to effective dated objects.

Module	Feature	Date/Time Info	What's Changed
Platform	Service Foundations – Scheduled Job	Timestamp in File Names	If you append timestamp to the name of files handled by scheduled jobs (job types that are embedded with files for both import and export jobs), ensure that the timestamp is based on the Tenant Preferred Time Zone configured in SAP SuccessFactors. The following aren't impacted when the Tenant Preferred Time Zone is changed: • The time values in the job monitoring tool of Scheduled Job Manager in the Admin Center are populated based on the browser time zone of a user. • The time you configured when creating or editing job requests in an occurrence pattern is based on the current server time zone. • The time values displayed while viewing the occurrence configurations in job request details are based on the time zone when you created or updated the job requests. These values might be different from current server time zone.

Module	Feature	Date/Time Info	What's Changed
Platform	Service Foundations – External Events	The date and time for *External Events Audit Log* in an Audit table.	Changes include: • The date and time displayed and used for search is based on the Tenant Preferred Time Zone (TPT). • The date and time stored in the database is converted to UTC and remains consistent.
Workforce Analytics	Reporting and Analytics		The impact in Reporting and Analytics includes: We've introduced a new version of date and timestamp fields (columns) for reporting models (Story reporting, Ad-Hoc reporting, and so on). This helps to ensure the expected behavior of the time zone changes and UTC resilience when using these new fields.

Module	Feature	Date/Time Info	What's Changed
Workforce Analytics	Classic Reporting		Impact on Non-UTC users: **Custom Spreadsheets**: The custom spreadsheets aren't updated to reflect UTC migration or Tenant Preferred Time Zone. These are managed by customers. SAP SuccessFactors HCM Core Automation for non-Workforce Analytics users: The hyperscaler migration doesn't impact the Workforce Analyticsusers. The SAP SuccessFactors HCM Core automation is updated seamlessly and doesn't impact any user as part of the UTC migration. However, any SAP SuccessFactors HCM Core automation used for Non-Workforce Analytics integrations isn't updated and therefore impacted by the UTC migration.
Workforce Analytics	Workforce Analytics on HANA		Workforce Analytics on HANA users must redo an initial load using the Workforce Analytics Data Factory to ensure the update is working after Tenant Preferred Time Zone value change.
Workforce Analytics	Advanced Reporting	New columns with the suffix *(Date)* or *(Timestamp)*.	Data, filters, and calculated column output reflect the Tenant Preferred Time Zone value for the date or timestamp related fields.

Supported Time Zones

The time zones supported for the Tenant Preferred Time Zone changes are:

- UTC (Coordinated Universal Time)
- Australia/Syndney (Australian Eastern Standard Time (New South Wales))
- CET (Central European Time)
- America/Chicago (Central Standard Time)
- America/New_York (Eastern Standard Time)
- America/Los_Angeles (Pacific Standard Time)
- Asia/Tokyo (Japan Standard Time)
- Brazil/East (Brasilia Time)
- Asia/Singapore (Singapore Time)
- Europe/Moscow (Moscow Standard Time)
- Asia/Shanghai (China Standard Time)
- Asia/Dubai (Gulf Standard Time)
- Asia/Riyadh (Arabia Standard Time)

26.1 Updating Tenant Preferred Time Zone

Update the tenant preferred time zone to accommodate the user behavior in your organization.

Prerequisites

You have the *Manage System Properties* > *Platform Feature Settings* permission.

Context

> ⚠ Caution
>
> Changing tenant preferred time zone is only allowed once and can't be reverted.

Procedure

1. Go to *Admin Center* > *Platform Feature Settings*.
2. Select the time zone that is more suitable to the user behavior in your organization.
3. Save your change.

27 Extension Center

Extension Center allows you to configure the integration between SAP Business Technology Platform (SAP BTP) and SAP SuccessFactors to extend the functionality of SAP SuccessFactors with applications deployed in SAP BTP.

Extensions on SAP Business Technology Platform (SAP BTP) are applications, designed to serve a certain scenario or task flow. These applications are deployed in your SAP BTP extension subaccount.

You can configure the extension integration between your SAP SuccessFactors company and your SAP BTP accounts:

- Subaccount in SAP BTP, Neo environment.
  There are links pointing directly to the respective subaccounts in the SAP BTP Neo cockpit and to the SAP Cloud Portal.
- Global account in SAP BTP, Cloud Foundry, or Kyma environment.
  There are links pointing directly to the respective global accounts in the SAP BTP cockpit.

27.1 Enabling Extension Center

Enable Extension Center in Upgrade Center and refresh OData API metadata.

Prerequisites

You have the *Administrator Permissions* > *Manage Integration Tools* > *Access to OData API Metadata Refresh and Export* permission.

Procedure

1. Go to *Admin Center* > *Upgrade Center*.
2. Complete the upgrade of *Extension Center*.
3. Go to *Admin Center* > *OData API Metadata Refresh and Export*.
4. Choose *Refresh*.

   Once the refresh is done, you will get a successful refresh message along with the date and timestamp of the refresh.

Results

You have enabled *Extension Center*.

27.2 Configuring Integration Between SAP SuccessFactors and SAP BTP

Use integration keys to pair your SAP SuccessFactors instance and SAP BTP.

Prerequisites

- You have registered your SAP SuccessFactors instance with a global account in SAP BTP. See Registering an SAP System.
- You are an administrator of the global account where you want to register your SAP SuccessFactors instance.
- You have the following permissions:
  - *Administrator Permissions* > *Metadata Framework* > *Admin Access to MDF OData API*
  - *Administrator Permissions* > *Manage Extensions on SAP BTP* > *Create Integration with SAP BTP*

Context

The registration process is based on an integration token that is used for the pairing of the SAP SuccessFactors instance and the corresponding account in SAP BTP:

- For integration with SAP BTP, Neo environment:
  Your SAP SuccessFactors instance is integrated with the corresponding subaccount in SAP BTP, Neo environment.
- For integration with SAP BTP, Cloud Foundry or Kyma environment:
  Your SAP SuccessFactors instance is integrated with the corresponding global account in SAP BTP. You create the token in the global account, and then start the automated registration process on the SAP SuccessFactors instance side using this token.

Procedure

1. Generate an integration token in the SAP BTP cockpit:
   - For integration with SAP BTP, Neo environment, see Configure the Extension Integration Between SAP BTP and SAP SuccessFactors.
   - For integration with SAP BTP, Cloud Foundry or Kyma environment, see Register an SAP SuccessFactors System in a Global Account in SAP BTP.

2. Go to *Admin Center* > *Extension Center*.
3. Paste and add the integration token in *Integration Token*.

Results

Your SAP SuccessFactors instance appears in the integration list, and the status of the integration is displayed. To refresh the status of the process, choose the *Check Status* icon.

28 Using Data Inspector

The Data Inspector admin tool is designed for you to view and download the raw data in a tabular format from the system. In the table, it's possible to review the various entity tables accessed previously by different tools in SAP SuccessFactors.

Prerequisites

- The *Disable OData API* option is unchecked in Provisioning, because Data Inspector is based on OData API.
- You have the following administrator permissions:
  - *Manage System Properties* > *Data Inspector*
  - *Manage Integration Tools* > *Access to OData API Metadata Refresh and Export*
  - *Manage Integration Tools* > *Access to OData API Data Dictionary*
- Optionally, to see the latest metadata, you can trigger OData API Metadata under *Admin Center* > *OData API Metadata Refresh and Export*.

Context

Data Inspector only allows you to view and download the table. You can't modify or upload the table using Data Inspector. Also, the tool doesn't show personally identifiable information (PII).

Procedure

1. Go to *Admin Center* > *Data Inspector*.
2. Choose a table or system information item from the *Entity* dropdown.
3. Define filter criteria.

   The text boxes in the *Define Filter Criteria* are case-sensitive.
4. Choose *Show Data*.

   A *Results* table is displayed.
5. To download the report, choose *download*.

Results

The data are downloaded in a .csv file.

29 Returning Users to Personal Start Page Instead of Last Visited Page After Their Sessions Expire

When SAP SuccessFactors ends user sessions (either for idle time or closing a browser), we return users to the last page they were viewing before they were timed out so that they can easily return to their work. If you have a reason why you can't return them to the last page they were visiting, however, you can return them to a personal start page.

Prerequisites

You have the *Company System and Logo Settings* permission.

Context

If users are idle for a period of time, or if they close the browser, SAP SuccessFactors ends their sessions and signs them out. By default, when they sign in again, they see the page that they were viewing before SAP SuccessFactors ended their session: they see the "last-visited" page. We assume that they want to restart their work where they left off, as opposed to searching for the last page they were viewing. Last-visited page is the best choice for most customers, which is why we set it as the default.

Your company, however, might **not** want to return users to the last-visited page. You can, therefore, configure SAP SuccessFactors to open users' personal start page. When they sign in again, they see whatever personal start page they configured in their account settings. To continue their work, they search for the page they were last visiting.

> ⓘ Note
>
> *Choose the page that users are redirected to after a session timeout* applies only when the user's previous session has **expired**, without the user actively logging out. If users formally sign out, they're **always** redirected to their personal start page the next time they log in.

Procedure

1. In Action Search, search for and open *Company System and Logo Settings*.
2. Find *Choose the page that users are redirected to after a session timeout*.
3. Decide your company's behavior when sessions time out:
    - Select *Last-Visited Page* to redirect users to the last page they visited before the session expired. This is the default. It allows users easily return to the last thing they were doing before they were signed out.

- Select *Personal Start Page* to redirect users to the start page that's defined in their personal account settings.

Example

Imagine an employee who is working on goals. The employee is interrupted by an email from their manager about an urgent problem, and the manager tells them to resolve the problem within the hour. The employee quits working in SAP SuccessFactors, so their session times out.

If you made no changes to *Choose the page that users are redirected to after a session timeout*, then when the employee returns to SAP SuccessFactors, they open the Goals page. The Goals page was the last page they were viewing before they started solving the problem for their manager. SAP SuccessFactors "remembers" what they were doing so that they can easily return to their goals.

If, however, you go to *Choose the page that users are redirected to after a session timeout* and you set it to *Personal Start Page*, then the employee opens their start page and searches for the Goals page.

30 Enabling the Main Navigation Menu

If you accidentally disabled the main navigation menu, or you disabled it temporarily for a business reason, you can enable it again so that the navigation system works as intended again.

Procedure

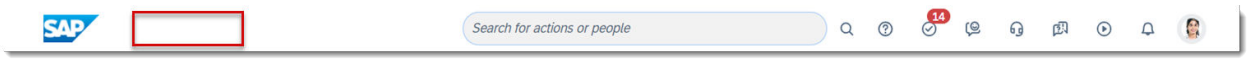
1. Go to *Admin Center* > *Tools* > *Company System and Logo Settings*.
2. Clear *Hide Global Navigation Menu (Module Picker)*.
3. Save your changes.

Results

All users immediately regain access to the main navigation menu.

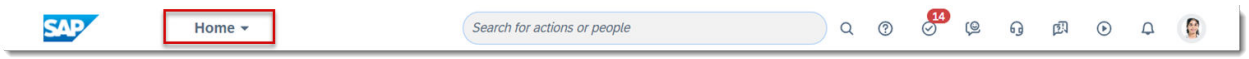
Example

If the main navigation menu is **disabled**, users must rely on another navigation system like action search. Here's an example.



Global page header without main navigation menu

By default, both the main navigation menu and action search appear in the global page header. Here's an example:



Global page header with main navigation menu

31 Enabling Icons and Sections in the Main Navigation Menu

If you temporarily disabled icons and sections in the main navigation menu, you can enable them.

Context

By default, the main navigation menu includes icons that represent each product area and is organized in three sections. Links are sorted alphabetically, based on the user's locale. The default behavior is one that we think is best for almost all customers. If you changed the default, then menu items are displayed as a single list, without icons and in an arbitrary order.

Procedure

1. Go to *Admin Center* > *Company System and Logo Settings*.
2. Select *Show icons and use alphabetical order in the main navigation menu*.
3. Save.

Change History

Learn about changes to the documentation for the Admin Center in recent releases.

2H 2024

Type of Change	Description	More Info
January 17, 2025		
Changed	We've removed the Joule topic from this guide and created a separate guide dedicated to Joule.	Joule in SAP SuccessFactors
November 15, 2024		
New	We added information about AI-assisted features in Onboarding.	AI-Assisted Writing [page 78]
New	We added a new topic to list the Base AI features that are available for free in your SAP SuccessFactors applications.	Base AI Features in SAP SuccessFactors [page 76]

1H 2024

Type of Change	Description	More Info
New	We added information about AI-assisted features.	Premium AI Features in SAP SuccessFactors [page 46] AI-Assisted Writing [page 78] Enabling AI-Assisted Writing [page 79] Viewing the AI Usage Acknowledgment Statement [page 80] Accessing the AI Services Administration Page [page 81]
New	We added information about SAP Companion.	SAP Companion in SAP SuccessFactors [page 109]

2H 2023

Type of Change	Description	More Info
November 17, 2023		
New	We added a new topic that Joule is now supported in SAP SuccessFactors.	
October 20, 2023		
New	We added information about the latest Built-In Support feature.	Built-In Support [page 26]
Changed	We removed references to the Release Center since it's deprecated as of 2H 2023.	Accessing the Upgrade Center [page 113]
Changed	We have moved the Change History to the end of the guide.	Admin Center [page 5]

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