SAP SuccessFactors

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Implementing Search

THE BEST RUN SAP

Content

1 People Search

1.1 What Is People Search?

SAP SuccessFactors builds a complete set of search features to help you find employees across your organization.

Using People Search capabilities, you can do the followings:

- Search for employees in the search box that adopts Autocomplete Search on certain module pages.
- Search for employees with the search widget of Advanced Search.
- Search for employees in the search box at the global header.

> → Remember
>
> Some other products also have distinct people search features, such as Candidate Search, Directory Search, and Talent Search, to help users find target employees based on their own product logics.

Apart from People Search, you can also trigger specific tasks by typing relevant actions in the search box at the global header. Find more details in Action Search [page 45].

Related Information

Universal People Search
Global Header People Search

1.2 People Search Terminologies

List all frequently used search terminologies to help you better understand the work logic of People Search.

Term	Abbreviation	Definition
Employee Central user	EC user	EC user represents an employee who has access to Employee Central service.
Non-Employee Central user	Non-EC user	Non-EC user represents an employee who doesn't have access to Employee Central service.
Search criteria	N/A	Search criteria mean that the search fields or filters leveraged by users to search for target employees.

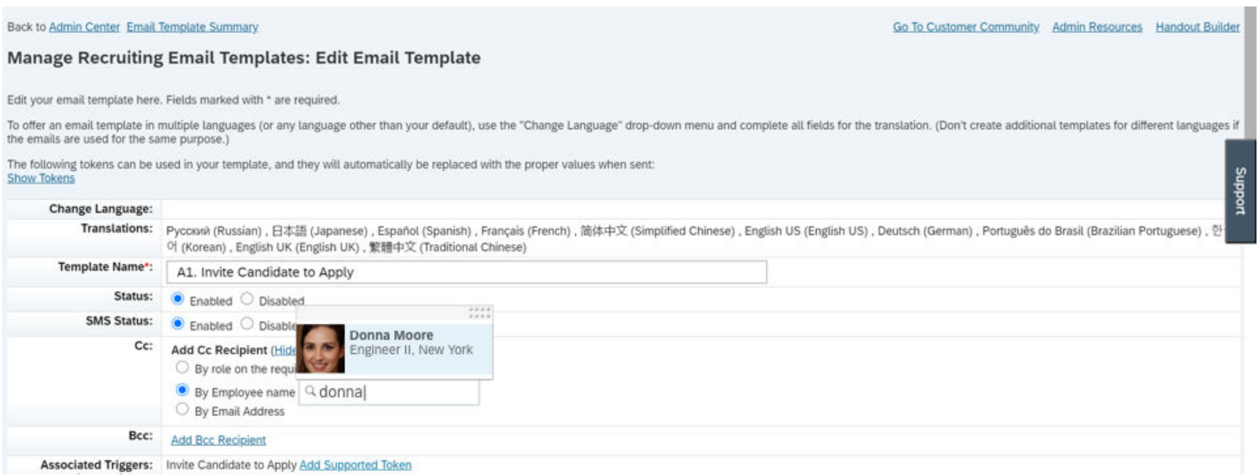
1.3 Universal People Search

As part of People Search, Universal People Search helps users search for and find employees across your organization on module pages.

Autocomplete Search

As one of the main features of Universal People Search, Autocomplete Search is enabled by default in your instance. Users can search for and find employees with basic search criteria by using the search boxes in supported module pages.

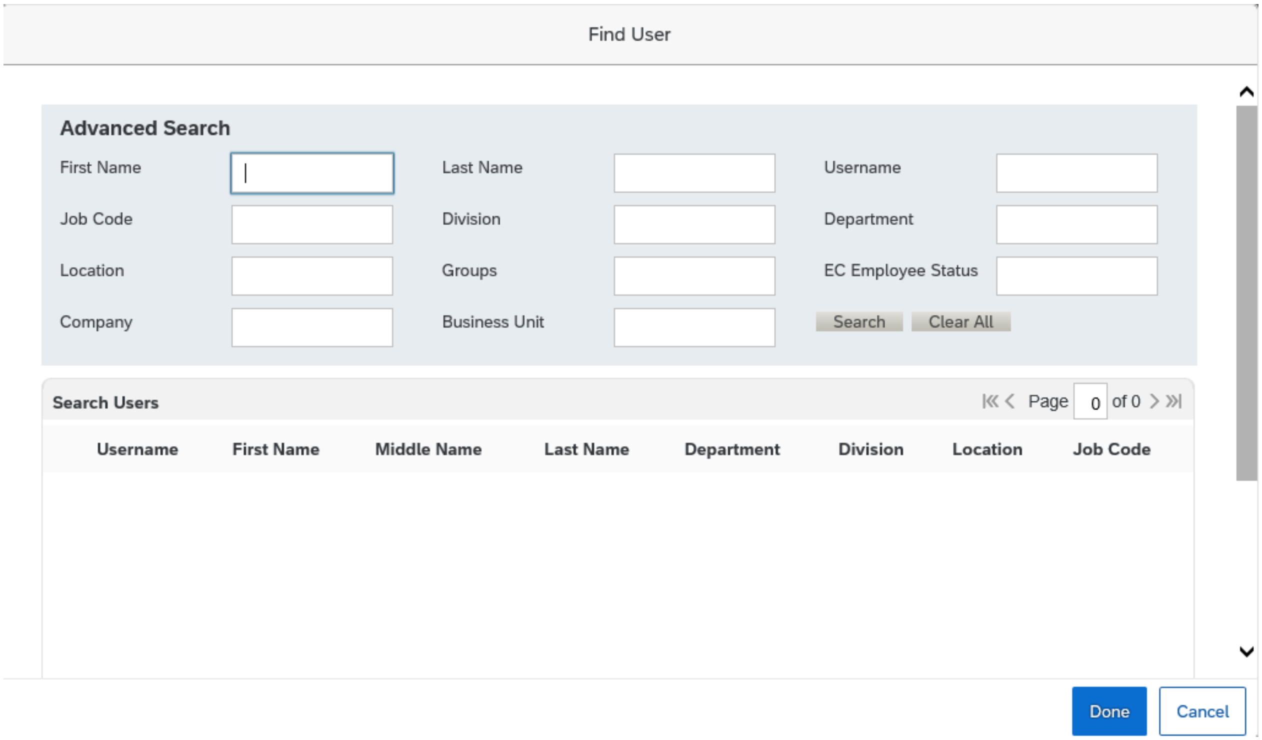
For example, you can search for and add people as email recipients by using the search box in this Recruiting page.



Advanced Search

For another feature of Universal People Search, Advanced Search is also enabled by default and helps users search for and find relevant employees with more comprehensive search criteria by using the Advanced Search widget on certain module pages.

For example, you can search for and add people as offer approvers by using this search widget in Recruiting pages.



Highlights of Universal People Search

- Supports finding non-EC (Employee Central) employees with their basic employee info.
- Supports finding EC employees with their alternative names.
- Supports one-character search for the users logged in with simplified Chinese, traditional Chinese, Japanese, and Korean locales in most module pages. When you sign in with such locales and search for employees with one character in the search boxes or in the search widgets, the search results return employees automatically. For other languages, a search is only triggered with at least two characters.
- Supports for fuzzy search, allowing you to find an employee by a search term that has one-character difference from the target employee name.
- Supports searching for an employee name with at most four keywords. (The keywords here refer to names such as first name, middle name, last name, etc.) The user query that contains more than four keywords is regarded as invalid input and no search results is returned.
- Supports searching for employee names that contain characters with accents, umlauts, diereses, etc.
- Supports non-Latin and non-English users to use the special character "*" as a wildcard when they search for employees and are not sure about the exact spelling of their names.
- Supports showing users' employee info in a search result based on their user types and corresponding data resources.
- Supports displaying external users as well as internal employees.
- Supports displaying inactive employees (including future hires) in a search result.
- Supports displaying searched contingent workers with indicators in a search result by default if the logged in user has permission to view.

- Supports displaying formal name by default in a search result when user searches for an employee. If no formal name is configured for the target employee, a combination of first name, middle name, and last name is returned. The middle name may not be shown in the result in case no information is maintained for this field.
- Supports displaying multiple employments of an employee. Each employment type has a different indicator.

  Name Matching Logic in Universal People Search [page 7]
    Learn about the name matching logic when you search for employees in Universal People Search.

  Supported Modules for Autocomplete Search [page 8]
    List all the module pages that now have adopted Autocomplete Search.

  Supported Modules for Advanced Search [page 11]
    List all the module pages that now have adopted Advanced Search.

Related Information

People Search Terminologies

1.3.1 Name Matching Logic in Universal People Search

Learn about the name matching logic when you search for employees in Universal People Search.

Generally, all logged in users share the same name matching logic. But for non-Latin and non-English users, if you want to search for employees and are not sure about the exact spelling of their names, you can use the special character "*" as a wildcard. And here are the details for the entire logic:

- For all languages, if there are no special characters "*" in your query, return employees whose name fields' prefixes match at least the first character of each query keyword.
- For non-Latin and non-English languages, if your query has special characters "*", return employees whose name fields' prefixes or suffixes contain all query keywords. And, please also note that:
  - The special character appearing at the beginning of your first keyword is ignored.
  - Repeated special characters appearing at the beginning of your keyword are treated as one.
  - Special characters are not supported in the middle of one single keyword.
  - Special characters should be added before your keywords (not first keyword) if you want to use suffix search.

> Example
>
> Assuming person A Tomas Müller and person B Tomas Keller are your employees. When you:
>
> - search for **`*omas Müller`**, none of them is returned.
> - search for **`Tomas Mülle`**, person A is returned.
> - search for **`Tomas Kell`**, person B is returned.
> - search for **`Tom *ller`**, both person A and person B are returned.

> Restriction
>
> The languages that do not support special characters are listed below:

- Catalan, Valencian (ca)
- English (en)
- French (fr)
- Italian (it)
- Polish (pl)
- Portuguese (pt)
- Romanian, Moldavian, Moldovan (ro)
- Spanish, Castilian (es)

Related Information

Ranked Weighting of People Search Results [page 42]

1.3.2 Supported Modules for Autocomplete Search

List all the module pages that now have adopted Autocomplete Search.

Module	Supported Module Page
360 Reviews - SAP Fiori version	• Add Approver • All new UI pages • Internal and External Rater Search • Send Copy • 360 Executive Review
Calibration	Calibration Session
Career Development Planning	• All CDP People Picker UI5 version pages • Mentoring > Participant Invitations
Compensation	• Benefits • Rewards and Recognition > Nomination
Continuous Performance Management	Request/give Feedback
Data Protection and Privacy	• Change Audit Reports • Read Audit Reports • Subject Information
Dynamic Teams	Add Team Members

Module	Supported Module Page
Employee Central	• Company Structure Overview • Employment Info • Job Info • Job Relationships • Position Org Chart • Termination Screen • Workflow
Onboarding	• Buddy Assignment • Recommended People Assignment
Organization Chart	Search box
Employee Profile	• People Picker in People Profile • User info block > Live Profile Manager Fields
Performance and Goals	• Add Modifier • Ask for Feedback • Change Document Date • Delete Document • Document Transfer with EX option on • Form Inbox 1.0 • Get Feedback • Goal list page • Goal Management People Picker UI5 Version • Launch Form • Manage Document Visibility • Manage Route Map > "User" Role Configure • Modify Form Route Map • Restore Deleted Document • Route Completed Form • Route Document • Route Signature Stage Document
Presentations	All pages

<table>
<tr><th>Module</th><th>Supported Module Page</th></tr>
<tr><td>Recruiting</td><td>

Admin Center > Manage Onboarding Templates > Add/ edit New Email Template: CC/bcc
Admin Center > Manage Recruiting Email Templates > Edit Email Template
Admin Center > Manage Recruiting Groups
Admin Center > Manage Recruiting Settings > Applicant Profile Settings > Email Correspondence (Job Owner)
Admin Center > Manage Recruiting Settings > Recruiting Subscriber Settings
Admin Center > Manage Recruiting Settings > Return Email Address Information > Job Owner
Admin Center > Mass Delete of Job Requisitions
Admin Center > Reassign Job Requisitions
Admin Center > Reassign Offer Approvals
Admin Center > Recruiting Email Triggers > Select an Email Trigger > Forward as Applicant
Admin Center > Recruiting Email Triggers > Select an Email Trigger > Online Offer Cancelled by Sender
Admin Center > Restore Deleted Job Requisitions
Application > Interviewers Portlet > Set up Interviewers > Add Interviewer
Candidates > Select Candidate > Contact Candidates > Cc and bcc
Candidate > Select Candidate in Offer > Take Action > Forward > Forward as Applicant
Candidate > Select Candidate in Offer > Take Action > Offer Letter >

Send Online Offer
Send Email as PDF
Send Online Offer with E-signature Enabled

Candidate Summary > Forward > Forward to Job Requisitions
Events > Create New Event > Copy Existing Event
Events > Create New Event > Create New Event from Blank Template / Families and Roles
Interview Scheduling > Select Candidate > Assigned to (interviewer)
Interview Scheduling > Select Candidate > Start Scheduling > Add Interviewer
Offer > Offer Approval > Add Approver
Preferences > My Recruiting Team Preferences > Additional Users

</td></tr>
</table>

Module	Supported Module Page
	• Preferences > My Recruiting Team Preferences > Default Operator • Requisition > Job Req Summary > Create New > Create from Blank Template • Requisition > Job Req Summary > Create New > Copy Existing Job Requisition • Requisition > Job Req Summary > Create New > Edit Existing Requisition • Requisition > Job Req Summary > Edit Existing Requisition > Add Additional Users (Team Recruiting) • Requisition > Job Req Summary > Filter Options > User Fields for Operators
Role-Based Permission	• Data Privacy Statement > Search External User • Manage Permission Groups > Team View field • Set DPCS Statement Status > Search External User
Succession	All pages
User Proxy	Proxy Now user search

> **Restriction**
>
> Some module pages still run with old search behavior, pending for UX redesign and the adoption of Autocomplete Search.

1.3.3 Supported Modules for Advanced Search

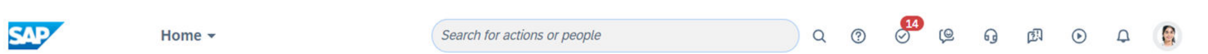
List all the module pages that now have adopted Advanced Search.

Module	Supported Module Page
360 Reviews - SAP Fiori version	• 360 Executive Review • Add Participant • Send Copy
Employee Profile	• Directory Search
Performance and Goals	• Route Completed Document • Goals > Cascade Goal > Select Recipients • Goals > Manage Team Goals > Assign Goal > Select Assignees
Platform	• GDPR (General Data Protection Regulation) pages

Module	Supported Module Page
Recruiting	• Admin Center > Manage Recruiting Settings > Recruiting Subscriber Settings • Business Rules • Events > Create New Event > Copy Existing Event • Events > Create New Event > Create New Event from Blank Template / Families and Roles • Events > Edit Existing Events • Offer > Offer Approval > Add Approver • Requisition > Job Req Summary > Create new > Copy Existing Job Req • Requisition > Job Req Summary > Create new > Create from Blank Template • Requisition > Job Req Summary > Create new > Edit Existing Requisition

1.4 Global Header People Search

Global Header People Search allows users to search for and find employees across the organization using a search box at the global header.



People Search in the Global Header

As part of People Search, Global Header People Search helps users search for and find employees in an easier way. Users can click on the search icon located in the global header to expand the search box and do the search. And from search results, users can view employees' quickcards or go to their Employee Profiles for more details.

Highlights of Global Header People Search

- Supports finding non-EC (Employee Central) employees with their basic employee info.
- Supports finding EC employees with their alternative names.
- Supports one-character search for the users logged in with simplified Chinese, traditional Chinese, Japanese, and Korean locales. When you sign in with such locales and search for employees with one character in the global header, the search results return employees automatically.
- Supports for fuzzy search, allowing you to find an employee by a search term that has one-character difference from the target employee name.
- Supports searching for an employee name with at most four keywords. (The keywords here refer to names such as first name, middle name, last name, etc.) The user query that contains more than four keywords is regarded as invalid input and no search results is returned.

- Supports searching for employee names that contain characters with accents, umlauts, diereses, etc.
- Supports showing users' employee info in a search result based on their user types and corresponding data resources.
- Supports displaying inactive employees (including future hires) in a search result.
- Supports displaying internal employees as well as the external users that adopt 360 Degree Multi-rater.
- Supports displaying searched contingent workers with indicators in a search result by default if the logged in user has permission to view.
- Supports displaying formal name by default in a search result when user searches for an employee. If no formal name is configured for the target employee, a combination of first name, middle name, and last name is returned. The middle name may not be shown in the result in case no information is maintained for this field.
- Supports displaying multiple employments of an employee. Each employment type has a different indicator.

In addition to searching for target employees, you can also trigger specific tasks by typing actions in the global header search box. Find more details in Action Search [page 45].

Prerequisites and Restrictions of People Search in the Global Header [page 13]
Learn about the prerequisite features and current restrictions of People Search to determine if it can be used in your system.

Related Information

People Search Terminologies

1.4.1 Prerequisites and Restrictions of People Search in the Global Header

Learn about the prerequisite features and current restrictions of People Search to determine if it can be used in your system.

People Search is enabled by default in all SAP SuccessFactors instances. However, restrictions apply to instances under certain conditions. If any of the following conditions apply to your instance, take the appropriate action.

- If you're using SAP Data Encryption by CipherCloud, you shouldn't use the latest version of People Search. Contact Product Support or your implementation partner to have the latest version disabled. But you can still use People Search to find employees in the global header but some newer functionality isn't compatible with the older version and can't be used in your instance.
- If you're using any locale other than traditional Chinese, simplified Chinese, Korean, or Japanese, you need to type two or more characters in order to search for an employee. Single-character search is possible only in the mentioned four languages.

Parent topic: Global Header People Search [page 12]

1.5 Setting Up People Search

The administrator can use the following role-based permissions and switches to set up the basic settings of Universal People Search and the People Search in the global header.

1.5.1 Enabling People Search

The administrator can grant the role-based permission to the target users to let them search for certain employees with People Search.

Prerequisites

- *Enable Solr People Search (requires Role-based Permission)* is enabled in Provisioning.

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

- You can manage role-based permissions.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Manage Permission Groups*. Create a permission group for the users that need to use People Search.

Assuming that you've created a permission group named "People Search". Then, all the users listed under this group can search for other employees after you grant the correct role-based permission to the group.

> → Tip
>
> For more details about how to create a permission group, you can refer to Permission Groups.

2. Go to *Admin Center* > *Tools* and search for *Manage Permission Roles*. Create new permission roles or select existing ones for your People Search users.

   Provided you want to create a new permission role, choose *Create New* and open *Permission Role Detail* screen.

   > → Tip
   >
   > For more details about how to create a permission role, you can refer to Permission Roles.

3. In *Permission Role Detail* screen, choose *Permission...* and open *Permission settings* dialogue box.
4. Grant the permission *User Permissions* > *General User Permission* > *User Search* to the permission role. Choose *Done*.
5. Still in *Permission Role Detail* screen, choose *Grant this role to...* > *Add...* and grant this permission role to the permission group you've configured for People Search users in Step 1. In our example, the group is "People Search". Choose *Done*.

   After being granted with this permission, the employees who are allocated to the permission group "People Search" can search for certain employees with People Search or other common search functions.
6. Save changes.

   To find out how long it takes for your above changes to take effect, see details in How Do Permissions Update When User Information Changes? And if the changes don't take effect within 10 minutes, you could manually refresh the permissions according to Refreshing RBP after Changes in Provisioning Configuration.
7. **Optional:** Back to *Admin Center* > *Tools* and choose *See All* to select *User Directory* under *Company Settings* > *Platform Feature Settings* if target users need to search for employees in the global header.

Results

People Search is now ready for you to use.

Related Information

List of Role-Based Permissions

1.5.2 Enabling Fuzzy Search in People Search

The administrator can enable the fuzzy search to let users search for employees with relevant employee names instead of exact matches in People Search.

Context

Fuzzy search allows users to find an employee by a search term that has one-character difference from the target employee name. This feature applies to the following scenarios:

- One missing or redundant character. If you search for "Joerg", the results also return "Jörg", and vice versa.
- One misspelled character. If you search for "Justen", the search results also return "Justin", and vice versa.

> Note
>
> Fuzzy search does not support Chinese, Japanese, and Korean.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Company System and Logo Settings*.
2. Select *Enable fuzzy search function for People Search*.
3. Choose *Save Company System Setting* to save your change.

Results

Previously, People Search only returned exact matches of the search terms. With fuzzy search enabled, users can search for employees with relevant results.

1.5.3 Configuring Search Criteria for People Search

The administrator can configure users' role-based permissions to allow them to search for target employees with certain search criteria.

Context

As an administrator, you can allow the logged in users to use certain search criteria by granting their corresponding role-based permissions. A search criterion may have two different role-based permissions. One is for Employee

Central users, and another is for the users that have no Employee Central enabled in their instances. Basically, we display the search criteria applicable for Employee Central first.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Manage Permission Roles*.
2. Create new or select existing permission roles for your users.

   Provided you want to create a new permission role to grant the role-based permission, choose *Create New* and open *Permission Role Detail* screen.

   > → Tip
   >
   > For more details about how to create a permission role, you can refer to Permission Roles.

3. In *Permission Role Detail* screen, choose *Permission...* and open *Permission settings* dialogue box.
4. In *Permission settings* screen, grant the role-based permissions listed below to the permission role and control the corresponding search criteria the logged in users can see. Choose *Done*.

Search Criteria	Applicable Search Feature	Customer Instance Type	Role-Based Permission
First Name	• Autocomplete Search • Advanced Search • Global Header People Search	Both types. This criterion can be used to search for employees within the instance that has enabled or without Employee Central.	This criterion is displayed by default and needs no more configuration.
Middle Name		Both types	This criterion is displayed by default and needs no more configuration.
Last Name		Both types	This criterion is displayed by default and needs no more configuration.

Search Criteria	Applicable Search Feature	Customer Instance Type	Role-Based Permission
Username		Both types	Grant the permission *User Permissions* > *Employee Data* > *Employee Profile* > *Username* to the logged in user. → Remember To search employees with usernames, make sure that you deselect the option *Hide Username in the UI* according to Hiding Username in Universal People Search [page 35].
Preferred Name / Nickname		• Preferred Name - EC instance only, which means this criterion can only be used to search for employees within the instance that has enabled Employee Central. • Nickname - Applicable for the instance without Employee Central.	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Central Effective Dated Entities* > *Personal Information* > *Preferred Name*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Nickname*. → Remember Before using **Preferred Name** and the next search criterion **Formal Name**, you should allow users to search for employees with alternative names first. See details in Enabling Employee Central Name Fields for People Search [page 23].

Search Criteria	Applicable Search Feature	Customer Instance Type	Role-Based Permission
Formal Name		EC instance only	Grant the permission *User Permissions* > *Employee Central Effective Dated Entities* > *Personal Information* > *Formal Name* to the logged in user.
General Display Name		Both types	See details in Enabling the Adoption of General Display Name.
Person ID		EC instance only	Grant the permission *User Permissions* > *Employee Data* > *HR Information* > *Biographical Information* to the logged in user.
Business Email Address / Email		• Business Email Address - EC instance only • Email - Applicable for the instance without Employee Central.	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Data* > *HR Information* > *Business Email Address*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Email*.

Search Criteria	Applicable Search Feature	Customer Instance Type	Role-Based Permission
Division	• Advanced Search • Global Header People Search	Both types	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Central Effective Dated Entities* > *Job Information* > *Division*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Division*. → Remember For **Division**, **Location**, and **Department**, after you grant role-based permission to the logged in user, they can search with these criteria in Advanced Search. If you want to use them in the global header, see details in Allowing Searching for Employees by Additional Search Criteria in the Global Header [page 26].

Search Criteria	Applicable Search Feature	Customer Instance Type	Role-Based Permission
Location		Both types	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Central Effective Dated Entities* > *Job Information* > *Location*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Location*.
Department		Both types	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Central Effective Dated Entities* > *Job Information* > *Department*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Department*.
• Hire Date From • Hire Date To	Advanced Search	Both types	Grant the permission *User Permissions* > *Employee Data* > *Hire Date* to the logged in user.
User Role		Both types	This criterion is displayed by default and needs no more configuration.
National ID		EC instance only	Grant the permission *User Permissions* > *Employee Data* > *HR Information* > *National Id Card* to the logged in user.

Search Criteria	Applicable Search Feature	Customer Instance Type	Role-Based Permission
Groups ⚠ Caution The administrator can consult implementation partner or Product Support to avoid security issues before using this criterion.		Both types	Grant all the following permissions to the logged in user: • *Administrator Permissions > Manage User > Manage Employee Dynamic Groups*. • *Administrator Permissions > Manage Recruiting > Manage Recruiting Groups*. • *Administrator Permissions > Manage Workflows > Manage Workflow Groups*.
Company		EC instance only	Grant the permission *User Permissions > Employee Central Effective Dated Entities > Job Information > Company* to the logged in user.
Customizable Field 1–15		Both types	See details in Configuring Customizable Fields on Advanced Search Widget [page 25].
Job Code		Both types	Grant the following permissions to the logged in user: • For EC instance: *User Permissions > Employee Central Effective Dated Entities > Job Information > Job Classification*. • For the instance without Employee Central: *User Permissions > Employee Data > Employee Profile > Job Code*.

Search Criteria	Applicable Search Feature	Customer Instance Type	Role-Based Permission
Tags		Both types	Grant the permission *User Permissions* > *Employee Data* > *Employee Profile* > *Tags* to the logged in user.

5. Still in *Permission Role Detail* screen, choose *Grant this role to...* > *Add...* and grant this permission role to the permission group that you've configured for People Search users in Enabling People Search [page 14]. Choose *Done*.
6. Choose *Save Changes*.

Results

Users now can search for target employees with configured search criteria.

Enabling Employee Central Name Fields for People Search [page 23]
The administrator can allow users to search for employees by their alternative name fields.

Configuring Customizable Fields on Advanced Search Widget [page 25]
The administrator can display customizable fields as search criteria on the search widget of Advanced Search.

Allowing Searching for Employees by Additional Search Criteria in the Global Header [page 26]
The administrator can let users search for target employees by using additional keywords, such as job title, location, department, or division.

Related Information

Configuring Role-Based Permissions to Allow Logged In User to View Certain Employee Information in People Search Results

1.5.3.1 Enabling Employee Central Name Fields for People Search

The administrator can allow users to search for employees by their alternative name fields.

Prerequisites

- You've enabled Employee Central.

- You've configured Employee Central name fields in Succession Data Model.

Context

As an administrator, you can allow users to search for employees by the following alternative names in addition to the basic name fields:

- Display Name
- Display Name Alt1
- Display Name Alt2
- First Name Alt1
- First Name Alt2
- Formal Name
- Formal Name Alt1
- Formal Name Alt2
- Last Name Alt1
- Last Name Alt2
- Middle Name Alt1
- Middle Name Alt2
- Partner Name
- Partner Name Prefix
- Preferred Name
- Second Last Name

Procedure

1. Go to *Admin Center* > *Tools* and search for *Company System and Logo Settings*.
2. Select the option *Search People by Employee Central Name Fields*.
3. Choose *Save Company System Setting* to save your change.

Results

Users now can find employees by using their alternative names.

Next Steps

If users still can't find employees with their alternative names, you can contact your implementation partner or Product Support to rebuild the employee search index.

1.5.3.2 Configuring Customizable Fields on Advanced Search Widget

The administrator can display customizable fields as search criteria on the search widget of Advanced Search.

Prerequisites

- You've configured customizable fields in Succession Data Model.

> Example
>
> If you want to display two customizable fields, add the following sample code in your data model.
>
> Sample Code
>
> ```
> <custom-filters>
>     <filter-module id="default">
>         <standard-element-ref refid="custom01"/>
>         <standard-element-ref refid="custom02"/>
>     </filter-module>
> </custom-filters>
> ```

Context

You can customize up to 15 additional search fields on the widget of Advanced Search after correct configuration.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Manage Permission Roles*.
2. In *Permission Role List* screen, create new or select existing permission roles for your users.

   Provided you want to create a new permission role to grant the role-based permission, choose *Create New* and open *Permission Role Detail* screen.

   > → Tip
   >
   > For more details about how to create a permission role, you can refer to Permission Roles.

3. In *Permission Role Detail* screen, choose *Permission...* and open *Permission settings* dialogue box.
4. In *Permission settings* screen, grant the permission *User Permissions* > *Employee Data* > *Customizable Field 1-15* to the permission role. Choose *Done*.
5. Still in *Permission Role Detail* screen, choose *Grant this role to...* > *Add...* and grant this permission role to the permission group you've configured for People Search users. Choose *Done*.

6. Choose *Save Changes*.

Results

The customizable fields are now displayed on the Advanced Search widget.

1.5.3.3 Allowing Searching for Employees by Additional Search Criteria in the Global Header

The administrator can let users search for target employees by using additional keywords, such as job title, location, department, or division.

Context

By default, you can only search for people by their names (first, middle, last, or user name) in your organization. But with this option enabled, you can allow users to search for certain employees by using the following search criteria:

- Job title
- Location
- Department
- Division

> ⚠ Caution
>
> This is a company-level setting that applies to all users of Global Header People Search, in all roles. Global Header People Search does not consider the role-based permissions to view these employee data for a target population. Therefore, if you need to restrict the visibility of these data to certain roles in your organization, you should not enable this option.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Company System and Logo Settings*.
2. Select the option *Search for people by additional keywords such as job title, location, department, or division (requires Role-based Permissions)*.
3. Choose *Save Company System Setting* to save your change.

Results

Users can now search for employees by using job title, location, department, or division information.

1.5.4 Configuring Role-Based Permissions to Allow Logged In User to View Certain Employee Information in People Search Results

The administrator can configure users' role-based permissions to control the visibility of certain employee information for your target employee in a search result.

Context

As an administrator, you can allow the logged in user to see certain employee information by granting their corresponding role-based permissions. Some employee information may have two different data sources. One is for Employee Central users, and another is for the users that have no Employee Central enabled in their instances. Basically, we return the search result applicable for Employee Central first.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Manage Permission Roles*.
2. Create new or select existing permission roles for your users.

   Provided you want to create a new permission role to grant the role-based permission, choose *Create New* and open *Permission Role Detail* screen.

   > → Tip
   >
   > For more details about how to create a permission role, you can refer to Permission Roles.

3. In *Permission Role Detail* screen, choose *Permission...* and open *Permission settings* dialogue box.
4. In *Permission settings* screen, grant the role-based permissions listed below to the permission role and control the corresponding employee information the logged in user can see. Choose *Done*.

Employee Information	Applicable Search Feature	Customer Instance Type	Role-Based Permission
First Name	• Autocomplete Search • Advanced Search • Global Header People Search	Both types. This employee information is displayed in a search result within the instance that has enabled or without Employee Central.	This employee information is displayed by default and needs no more configuration.

Employee Information	Applicable Search Feature	Customer Instance Type	Role-Based Permission
Middle Name		Both types	Grant the permission *User Permissions* > *Employee Data* > *Employee Profile* > *Middle Name* to the logged in user.
Last Name		Both types	This employee information is displayed by default and needs no more configuration.
User Name		Both types	Grant the permission *User Permissions* > *Employee Data* > *Employee Profile* > *Username* to the logged in user.
Formal Name		EC instance only, which means this employee info can only be shown in a search result within the instance that has enabled Employee Central.	Grant the permission *User Permissions* > *Employee Central Effective Dated Entities* > *Personal Information* > *Formal Name* to the logged in user.
Job Title / Title		Both types • Job Title - EC instance only • Title - Applicable for the instance without Employee Central.	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Central Effective Dated Entities* > *Job Information* > *Job Title*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Title*.
Status		Both types	To include inactive employees in a search result, you can follow the steps in Showing Inactive Employees in People Search Results [page 41].

Employee Information	Applicable Search Feature	Customer Instance Type	Role-Based Permission
Location	• Autocomplete Search • Advanced Search	Both types	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Central Effective Dated Entities* > *Job Information* > *Location*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Location*.
Email	Autocomplete Search	Both types	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Data* > *HR Information* > *Business Email Address*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Email*.

Employee Information	Applicable Search Feature	Customer Instance Type	Role-Based Permission
Department	Advanced Search	Both types	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Central Effective Dated Entities* > *Job Information* > *Department*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Department*.
Division		Both types	Grant the following permissions to the logged in user: • For EC instance: *User Permissions* > *Employee Central Effective Dated Entities* > *Job Information* > *Division*. • For the instance without Employee Central: *User Permissions* > *Employee Data* > *Employee Profile* > *Division*.
Contingent Worker	Global Header People Search	EC instance only	Grant the permission *User Permissions* > *Employee Data* > *Employee Profile* > *Contingent Worker* to the logged in user.
Phone		Both types	Grant the permission *User Permissions* > *Employee Data* > *Employee Profile* > *Business Phone* to the logged in user.

5. Still in *Permission Role Detail* screen, choose *Grant this role to...* > *Add...* and grant this permission role to the permission group that you've configured for People Search users in Enabling People Search [page 14]. Choose *Done*.
6. Choose *Save Changes*.

Results

Users now can see certain employee information in a search result after being granted with corresponding role-based permissions.

Display Logic of Job Title and Title [page 31]
Learn about the display logic behind *Job Title* and *Title* fields in People Search.

Display Logic of Location [page 33]
Learn about the display logic behind the two different *Location* fields in People Search.

Related Information

Configuring Search Criteria for People Search

1.5.4.1 Display Logic of Job Title and Title

Learn about the display logic behind *Job Title* and *Title* fields in People Search.

Before Using *Job Title* and *Title*

When you (logged in user) search for employees in the global header or on certain module pages, the job title or title information is returned in a search result. To display this information, prerequisites are as follows:

- Permissions are granted to you to view Job Title or Title fields:
  - You have the permission under *Employee Central Effective Dated Entities* > *Job Information* > *Job Title*.

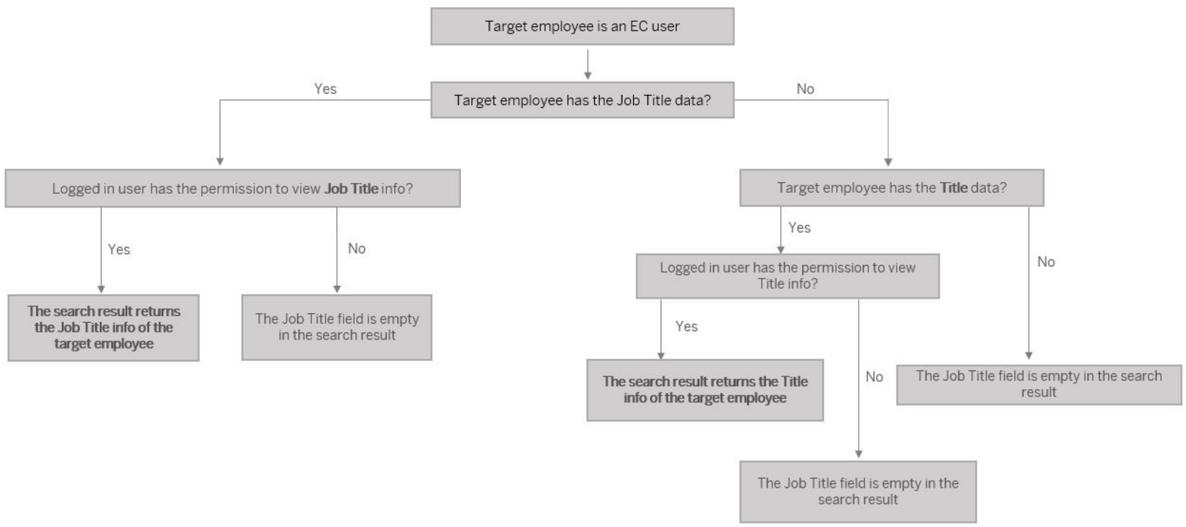
    > → Remember
    >
    > This permission is only applicable for the companies that have enabled SAP Employee Central.

  - You have the permission under *Employee Data* > *Employee Profile* > *Title*.
- Job Title or Title data is maintained for the employee you need to find.

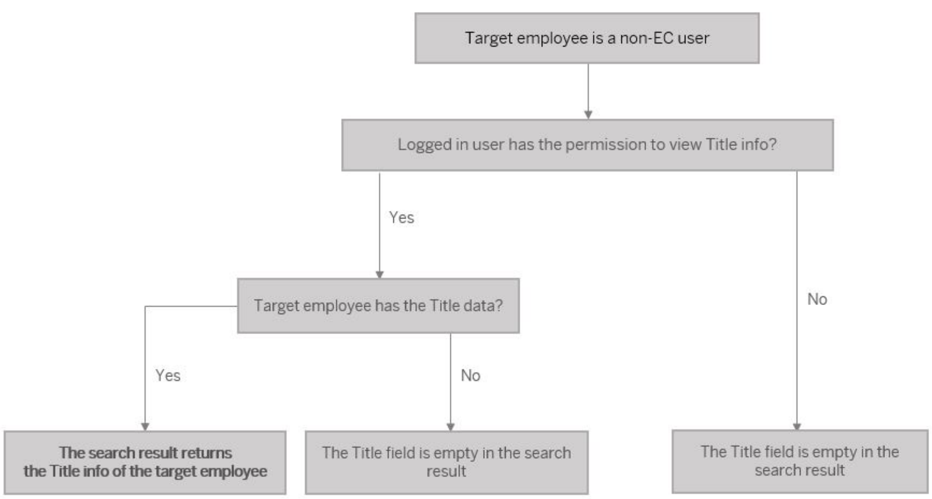
Display Logic

The display logic of showing job title or title information in a search result differs, mainly depending on whether the target employee has access to SAP Employee Central and has the corresponding data.

- If the target employee has access to Employee Central, find display logic in the flow chart below.



- If the target employee has no access to Employee Central, only Title information is returned.



If unexpected information is returned, check your data model in case the target employee's Job Title or Title information is maintained in the wrong place.

Parent topic: Configuring Role-Based Permissions to Allow Logged In User to View Certain Employee Information in People Search Results [page 27]

Related Information

Display Logic of Location [page 33]
People Search Terminologies

1.5.4.2 Display Logic of Location

Learn about the display logic behind the two different *Location* fields in People Search.

Before Using Location

When you (logged in user) search for employees in the global header or on certain module pages, the location information is returned in a search result. To display this information, prerequisites are as follows:

- Permissions are granted to you to view Location fields:
  - You have the permission under *Employee Central Effective Dated Entities* > *Job Information* > *Location*.

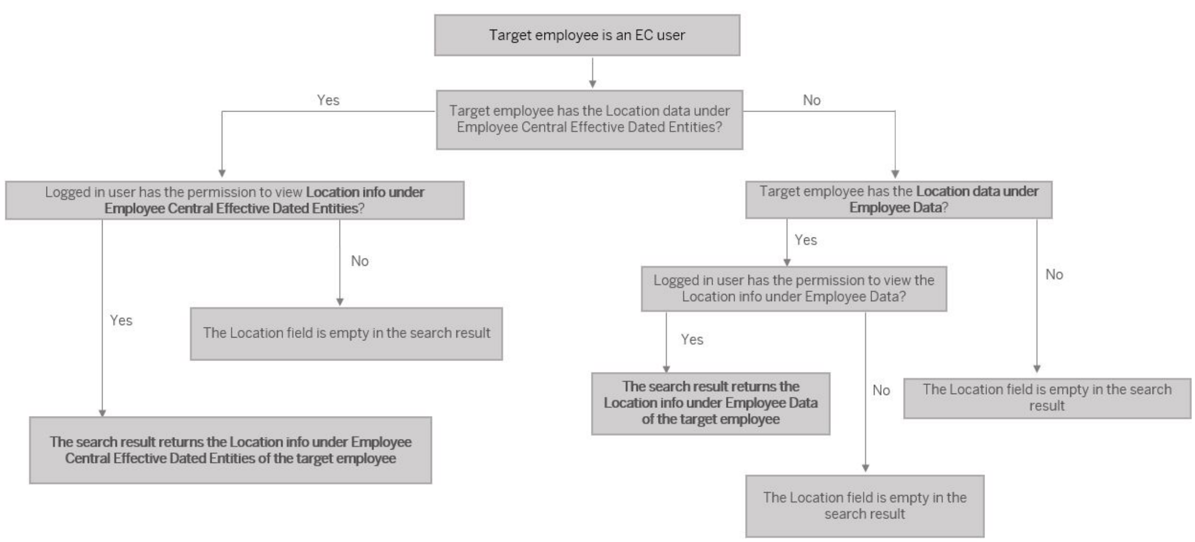
    → Remember

    This permission is only applicable for the companies that have enabled SAP Employee Central.
  - You have the permission under *Employee Data* > *Employee Profile* > *Location*.
- Location data is maintained for the employee you need to find.

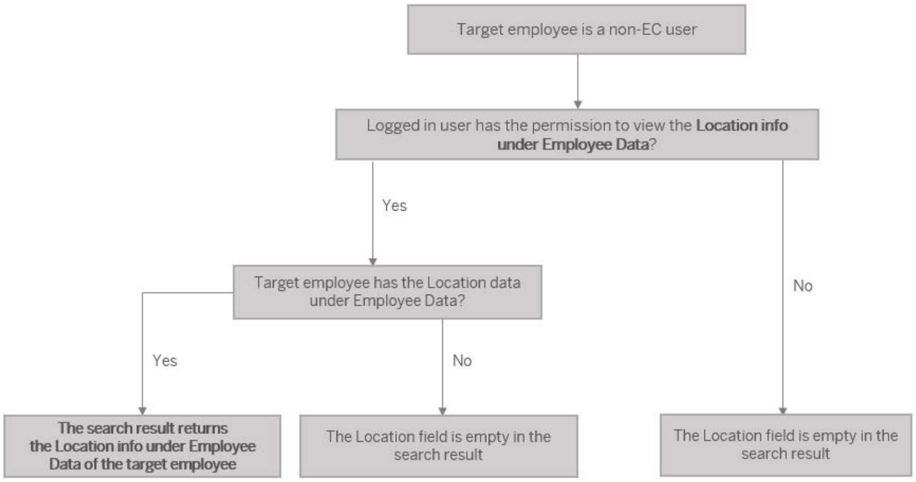
Display Logic

The display logic of showing location information in a search result differs, mainly depending on whether the target employee has access to SAP Employee Central and has the corresponding data.

- If the target employee has access to Employee Central, find display logic in the flow chart below.



- If the target employee has no access to Employee Central, only the location information under *Employee Data* is returned.



If unexpected information is returned, check your data model in case the target employee's location information is maintained in the wrong place.

Parent topic: Configuring Role-Based Permissions to Allow Logged In User to View Certain Employee Information in People Search Results [page 27]

Related Information

Display Logic of Job Title and Title [page 31]
People Search Terminologies

1.6 Working with People Search

The administrator can use the following role-based permissions and switches to further control the information the users can see in the Universal People Search and the People Search in the global header.

Working with Universal People Search [page 35]
: The administrator can use the following role-based permissions and switches to further control the information the users can see in a search result of Autocomplete Search and Advance Search.

Working with Global Header People Search [page 36]
: The administrator can use the following role-based permissions and switches to further control the information the users can see in the People Search in the global header.

Hiding Job Titles in People Search and Org Charts [page 39]
: Hide the job title information in People Search results and org charts if you don't want it to be displayed.

Showing External Users in People Search Results [page 40]

The administrator can display external users in a search result after relevant permission is configured.

Showing Inactive Employees in People Search Results [page 41]
The administrator can configure users' role-based permission and let them see inactive employees in a search result.

Ranked Weighting of People Search Results [page 42]
People Search assigns different ranking weights to the search criteria so that more relevant individuals are returned first.

1.6.1 Working with Universal People Search

The administrator can use the following role-based permissions and switches to further control the information the users can see in a search result of Autocomplete Search and Advance Search.

Hiding Username in Universal People Search [page 35]
The administrator can hide employees' usernames in Universal People Search.

1.6.1.1 Hiding Username in Universal People Search

The administrator can hide employees' usernames in Universal People Search.

Context

You can use the option *Hide Username in the UI* to deactivate employees' usernames in Universal People Search if you don't want to search for certain employees with their usernames or you don't need them to be displayed in a search result.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Platform Feature Settings*.
2. Select the option *Hide Username in the UI*.

   After you select this option, usernames are not displayed in the quickcard, Organization Chart, People Profile, and Change Audit reports as well.
3. Choose *Save*.

Results

In general, employees' usernames are now deactivated in Universal People Search. However, if usernames continue to be supported in certain pages, considering whether the module pages display usernames by default.

1.6.2 Working with Global Header People Search

The administrator can use the following role-based permissions and switches to further control the information the users can see in the People Search in the global header.

Hiding Certain Active Employments of an Employee in Global Header Search Results [page 36]
The administrator can choose to only show some of the employments of an employee for data privacy reasons in the global header.

Showing Employee Photos in Global Header Search Results [page 37]
The administrator can decide whether to show employee photos when logged in users search for employees in the global header.

Showing Employee Quickcard When Selecting an Employee in Global Header Search Results [page 38]
The administrator can choose to show employee quickcard when you select an employee in a search result.

Showing Latest Employee Photos in Global Header Search Results [page 39]
The administrator can keep the employee photos in a search result to the newest versions.

1.6.2.1 Hiding Certain Active Employments of an Employee in Global Header Search Results

The administrator can choose to only show some of the employments of an employee for data privacy reasons in the global header.

Prerequisites

- You've enabled Global Assignment and Concurrent Employment.
- You have the *Administrator Permissions* > *Manage System Properties* > *Company System and Logo Settings* permission.

Context

You can hide some employment information of an employee in the Organization Chart, employee quickcard, and Global Header Search results where required for data privacy reasons, and only display the employee's home or primary employment in the user interface. Otherwise, you can view an employee's multiple employment records by default.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Company System and Logo Settings*.
2. Uncheck option *Show all active employments (for Global Assignment and Concurrent Employment) on Quickcard, Organization Chart, and Global Search results*.
3. Choose *Save Company System Setting* to save your change.

Results

Some employment information of an employee is now hidden in the Organization Chart, employee quickcard, and Global Header Search results.

1.6.2.2 Showing Employee Photos in Global Header Search Results

The administrator can decide whether to show employee photos when logged in users search for employees in the global header.

Procedure

Select *Company Settings* > *Enable photos in autocompletion find in the UI* in Provisioning.

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

Results

Users now can see employee photos when they search for people in the global header after this option is selected.

1.6.2.3 Showing Employee Quickcard When Selecting an Employee in Global Header Search Results

The administrator can choose to show employee quickcard when you select an employee in a search result.

Prerequisites

You have the *Administrator Permissions* > *Manage System Properties* > *Company System and Logo Settings* permission.

Context

By default, selecting an employee in a search result navigates to that person's employee profile. But with an option turned on, users can open the quickcard of that employee instead.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Company System and Logo Settings*.
2. Check option *Selecting a user from global header search will show the quickcard*.
3. Choose *Save Company System Setting* to save your change.

Results

The default behavior changes immediately so that selecting an employee in a search result opens the quickcard. To navigate to the employee profile from the quickcard, users can click on the employee name.

1.6.2.4 Showing Latest Employee Photos in Global Header Search Results

The administrator can keep the employee photos in a search result to the newest versions.

Context

Once users update their profile photos, it generally takes a while to sync the changes. The administrator can contact implementation partner or Product Support to deactivate the photo cache and show the new photos in a search result immediately.

Procedure

Turn on *Company Settings* > *Disable Browser Photo Caching* in Provisioning.

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

Results

The employee photos are now updated to the latest.

1.6.3 Hiding Job Titles in People Search and Org Charts

Hide the job title information in People Search results and org charts if you don't want it to be displayed.

Prerequisites

You have the *Administrator Permissions* > *Manage System Properties* > *Company System and Logo Settings* permission.

Context

You can use option *Hide job title in People Search and org charts (Company Org Chart, Calibration Org Chart, and Succession Org Chart)* under *Admin Center* > *Company System and Logo Settings* to hide job title information for People Search and org charts.

> **Note**
>
> This option doesn't impact Position Org Chart.

Procedure

1. Go to *Admin Center* > *Company System and Logo Settings*.
2. In the *Company System Settings* section, check option *Hide job title in People Search and org charts (Company Org Chart, Calibration Org Chart, and Succession Org Chart)*.
3. Save your change.

Results

The job title field is hidden in People Search results, Company Org Chart, Calibration Org Chart, and Succession Org Chart.

1.6.4 Showing External Users in People Search Results

The administrator can display external users in a search result after relevant permission is configured.

Prerequisites

You have the *Administrator Permissions* > *Manage System Properties* > *Company System and Logo Settings* permission.

Context

Generally, external users can be displayed in a People Search result after the administrator deselects a permission named *Hide External Users from search results* in the Admin Center.

- To display external users in the module search boxes that adopt Universal People Search, the module pages where your module search boxes are located should support returning external users.
- When you do the search in the global header, only the external users using 360 Degree Multi-rater will be returned.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Company System and Logo Settings*.
2. Deselect *Hide External Users from search results*.
3. Choose *Save Company System Setting* to save your change.

Results

Employees can now find external users in a search result.

1.6.5 Showing Inactive Employees in People Search Results

The administrator can configure users' role-based permission and let them see inactive employees in a search result.

Context

As an administrator, you can configure users' role-based permission to display inactive employees in a search result. To use this feature in the module search boxes that have adopted Universal People Search, the target module pages should support returning inactive employees.

> → Remember
>
> Future hires are also recognized as inactive employees.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Company System and Logo Settings*.
2. Select *Show inactive user in people search (requires Role-based Permissions)*.

> ⚠ Caution
>
> If you don't want employees' inactive employments to be displayed in a search result, do not turn on this switch.

3. Choose *Save Company System Setting* to save your change.

Results

Users now can see inactive employees in a search result.

1.6.6 Ranked Weighting of People Search Results

People Search assigns different ranking weights to the search criteria so that more relevant individuals are returned first.

High Weighting

First Name, Last Name, Middle Name, Nickname, User Name

Medium Weighting

Formal Name, Formal Name Alt1, Formal Name Alt2, Preferred Name, Display Name, Display Name Alt1, Display Name Alt2, Second Last Name, First Name Alt, First Name Alt1, First Name Alt2, Last Name Alt, Last Name Alt1, Last Name Alt2, Middle Name Alt, Middle Name Alt1, Middle Name Alt2, Partner Name, Partner Name Prefix, Title, General Display Name

Low Weighting

Location, Division, Department, Person ID

Related Information

Name Matching Logic in Universal People Search [page 7]

1.7 Troubleshooting

The administrator can contact Product Support to rebuild your search index to troubleshoot following problems during using People Search.

- Always receiving an application error: 2395176
- Duplicate employee results or employees cannot be found: 2488359
- Employee info changes are not synced: 2766822

Showing Accurate Employees for Japanese and Chinese Queries in People Search [page 43]
The administrator can contact implementation partner or Product Support to set and return accurate employees when logged in users search for people in Japanese or Chinese.

1.7.1 Showing Accurate Employees for Japanese and Chinese Queries in People Search

The administrator can contact implementation partner or Product Support to set and return accurate employees when logged in users search for people in Japanese or Chinese.

Prerequisites

Enable Solr People Search (requires Role-based Permission) is enabled in Provisioning.

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

Procedure

1. Contact Product Support to select a new language for rebuilding your search index by selecting *Japanese (Japan)* or *Chinese (China)* for the option *Enable alternate language for solr index* in Provisioning.

   > ⚠ Caution
   >
   > With this option enabled, you can only search for employees by using first name, middle name, and last name. If you've enabled *Search People by Employee Central Name Fields* before to allow searching for employees by alternative names, it can still return unexpected results.

2. Contact Product Support to rebuild your search index in Provisioning.

   Rebuilding the search index refreshes the employee information in your database, which will display more precise and expected searched employees in a search result.

Results

Now, only accurate employees are returned in a search result.

2 Action Search

2.1 Action Search

Action Search is a feature that allows users to quickly find specific tasks in the system by typing a keyword in the search box at the top of every page.

With the deprecation of OneAdmin and universal migration to NextGen Admin, Action Search is turned on by default for customers who are new to NextGen Admin. If you have already upgraded to NextGen Admin before 1H 2022 and Action Search is turned off for your instance, there is no change. If you want to deactivate Action Search, contact your implementation partner or your Product Support.

As an administrator, you can optimize action search for your company and manage the actions that are available to users of your system. You add or edit search terms based on search usage data for your company, to make actions more findable. You can edit display labels so that they better align with terminology used in your company. You can even create your own navigation links with the *Configure Custom Navigations* tool and add them as custom actions in Action Search.

As an end user, you can find common actions and pages in the search box located in your global header. You can use natural language to describe what you want to do, in your own words, and then select from a list of suggested actions.

Prerequisites for Action Search [page 45]
In order to use action search, you must first have the following prerequisite features enabled in your system.

Action Search for End-Users [page 46]

Action Search for Administrators [page 48]

2.1.1 Prerequisites for Action Search

In order to use action search, you must first have the following prerequisite features enabled in your system.

Prerequisite	Why required
Role-Based Permissions	Role-based permissions are used to determine who can see which actions in action search.
User Directory	Action search is integrated with the people search box in the global page header. People search requires User Directory.

→ Tip

Although it is not strictly a prerequisite, the *Configure Custom Navigations* tool is required to create and add custom actions. If needed, please contact SAP SuccessFactors to have this enabled.

Parent topic: Action Search [page 45]

Related Information

Action Search for End-Users [page 46]
Action Search for Administrators [page 48]

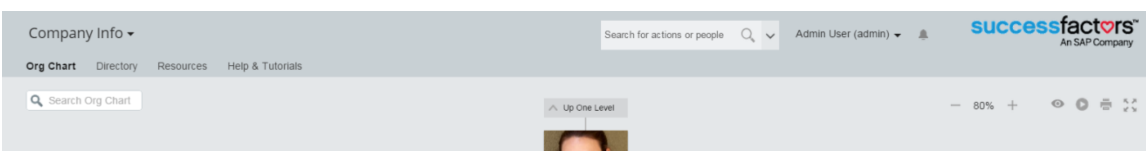
2.1.2 Action Search for End-Users

Before you start configuring action search as an administrator, you need to understand how the feature behaves for end-users. Following is a brief overview of action search functionality.

Accessing Action Search

After you have successfully enabled and permissioned action search, you see the text prompt *Search for actions or people* in the search box. You can type any text in the box to search for actions or people.

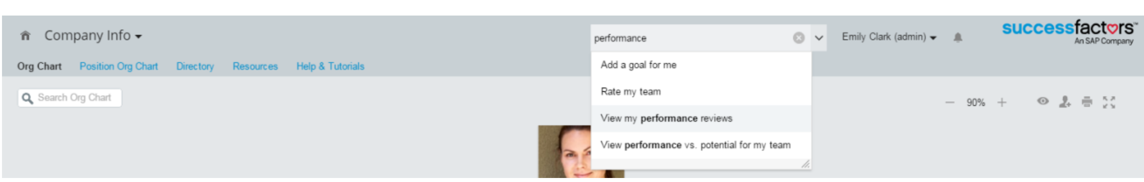
> → Remember
>
> If you use any locale other than Japanese, you need to type two or more characters in order to search for an action. Single-character search is possible only in the Japanese locale.



Searching for Actions

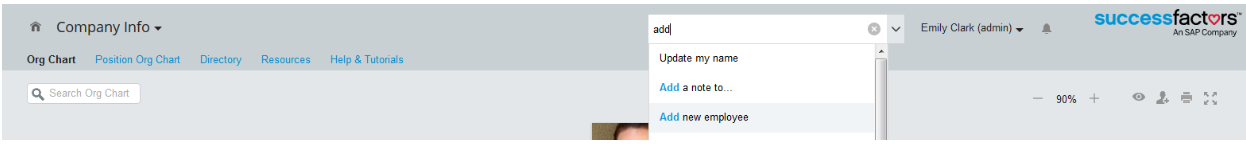
You can type search terms that describe the desired action. For example, you might type **`add an employee`** or **`view my performance review`** or **`request time off`**. If the entered text matches any of the search terms associated with any of the available actions, those actions are listed in the search results.

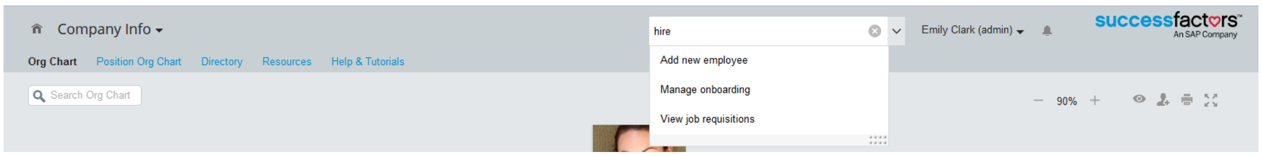
Action search results respect both system configuration and system permissions, so you do not see actions that are not available to you or that you do not have permission to perform.



Using Natural Language

Search terms do not need to exactly match the labels displayed in the user interface. You can use natural language to describe actions in your own words. For example, to add a new user to the system, you might type **`add employee`** or **`add user`** or **`hire`**:

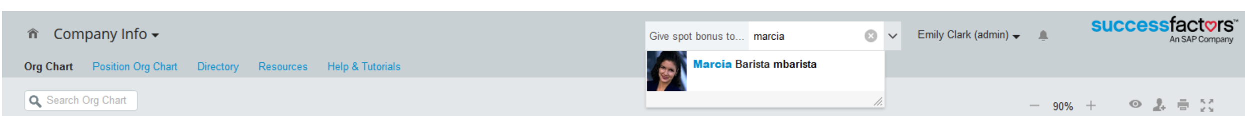


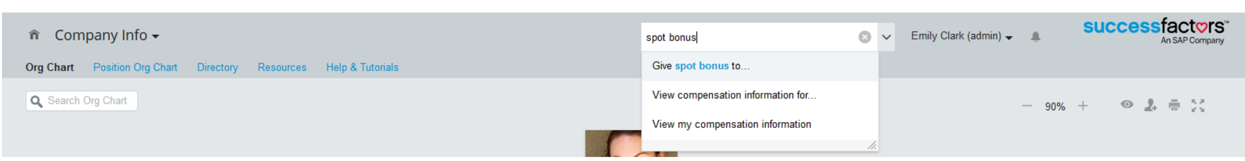


Both of these search terms return the action *Add new employee*. Similarly, in order to request a day off, you might type **`take day off`** or **`request leave`** or **`PTO`**. Any of these terms will return the *Request time off* action and navigate you to the appropriate page.

Searching for Transitive Actions

Transitive actions are actions that require a target, or object, of the action. After you have selected a transitive action in the search results, you must also select the target— that is, the person on whom you wish to perform the action. For example, if you select *Give spot bonus to*, you must then select the person to whom you wish to give a bonus.





Transitive actions respect system permissions, so you are not able to select target users on whom you are not allowed to perform the selected action.

Selecting an Action

By selecting a suggested action for the action search results, you are presented with an appropriate interface from which to perform the desired action.

In most cases, you are navigated away from your current page, directly to the appropriate page where the action can be completed. For example, when you select *Rate my team*, you are taken to the appropriate page in Performance Management where this action is performed.

In other cases, after selecting an action, you are presented with a dialog box where the action can be completed without leaving your current page. For example, by selecting the *Give a badge* action and a target user, you can open the *Give a Badge* dialog for the selected user, right on top of any page of the application.

> **Note**
>
> **You do not actually submit changes or complete actions with action search alone.** Action search will not allow you to submit any transactions without the appropriate workflow or without additional confirmation. In the example above, you are not actually giving a spot bonus to the selected user from within the search box. Instead, after selecting the target user, you are navigated to the appropriate page of that user's Employee Files where a spot bonus can be given.

Parent topic: Action Search [page 45]

Related Information

Prerequisites for Action Search [page 45]
Action Search for Administrators [page 48]

2.1.3 Action Search for Administrators

Introduction

No configuration steps are required after action search is enabled. You can immediately start using it to find and complete a large number of actions that are available by default.

However, as an administrator, you can also use the new *Manage Action Search* admin tool to modify the default search behavior. This allows you to optimize action search results for people in your company and facilitate access to additional frequently-used actions.

You can also add custom actions to your instance. You can create custom navigation actions using the *Configure Custom Navigation* tool. Also, when you create new reports or dashboards, they are automatically made available in action search as well.

Once added to action search, both custom navigation actions and custom Reporting and Analytics actions can be managed in a similar way to default actions, using *Manage Action Search*.

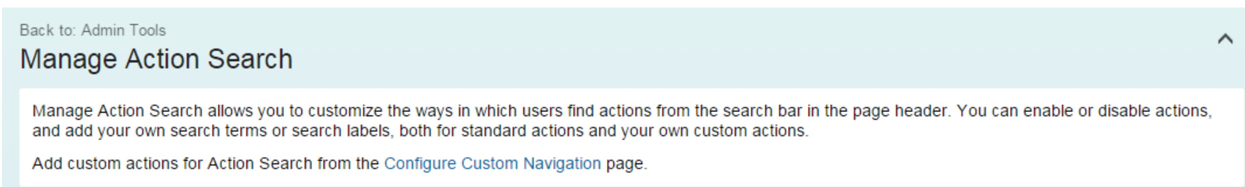
Accessing Manage Action Search

After you have successfully enabled action search and granted the appropriate permission, you can access the *Manage Action Search* tool by going to *Admin Tools* > *Company Settings* > *Manage Action Search*.

> **Note**
>
> If you have been successfully granted the appropriate permission but still do not see the *Manage Action Search* link in *Company Settings*, then your system may not be configured properly. Please contact SAP SuccessFactors to validate your configuration.

Accessing Configure Custom Navigation

If *Configure Custom Navigation* is enabled in your instance, you access it by going to *Admin Tools* > *Company Settings* > *Configure Custom Navigation* or by clicking the link to it at the top of the *Manage Action Search* page:



> **Note**
>
> To enable *Configure Custom Navigation* in your instance, you require a SAP SuccessFactors engagement.

Parent topic: Action Search [page 45]

Related Information

Prerequisites for Action Search [page 45]
Action Search for End-Users [page 46]

2.2 Enabling Action Search

The administrator can activate Action Search in the Upgrade Center.

Prerequisites

- User Directory search is enabled in your instance.
- You have access to the Upgrade Center .

> → Tip
>
> For any configuration questions concerning this part, you can refer to the attached related links.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Upgrade Center*.
2. In the *Upgrade Center*, choose *Recommended Upgrades* > *Action Search*.
3. Read the description in the upgrade page of Action Search and choose *Upgrade Now* to initiate the deployment.

Results

Action Search is now immediately available in the global header to all users.

> → Remember
>
> You can undo this upgrade in the *Admin Center* > *Upgrade Center* > *View Recently Completed Upgrades* within the first 10 days. Once you trigger the undo procedure, Action Search is deactivated in your instance. But you can reinstall it after you go through the above steps again.

Next Steps

If you want to use Action Search in your instance with the default behavior, you're done. No additional admin tasks are required.

If you want to make changes to the default behavior of Action Search, such as changing display labels or adding search terms, you need to give administrators the *Manage Action Search* permission.

If you want to add new custom actions to your instance, enabling users to find and use custom navigation links in Action Search, you need to enable the *Configure Custom Navigation* option in Provisioning and give administrators the *Configure Custom Navigation* permission.

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

Related Information

Controlling Access to Upgrade Center
Accessing the Upgrade Center

2.3 Enabling Cross-Language Lookup for Action Search

The administrator can grant the corresponding role-based permission to certain employees and allow them to search in English in the global header or in the *Tools* section of *Admin Center* even if they log in with non-English language.

Prerequisites

You can manage role-based permissions.

Procedure

1. Go to *Admin Center* > *Tools* and search for *Manage Permission Groups*. Create a permission group for the users that need to use Action Search.

   Assuming that you've created a permission group named **`Action Search`**. Then, the non-English language users listed under this group can search actions in English in the global header search box or in the *Tools* section of *Admin Center* after you grant the correct role-based permission.

   > → Tip
   >
   > For more details about how to create a permission group, you can refer to Permission Groups.

2. Back to *Admin Center* > *Tools* and search for *Manage Permission Roles*. Create new permission roles or select existing ones for your Action Search administrators.

   Provided you want to create a new permission role, choose *Create New* and open *Permission Role Detail* screen.

→ Tip

For more details about how to create a permission role, you can refer to Permission Roles.

3. In *Permission Role Detail* screen, choose *Permission...* and open *Permission settings* dialogue box.
4. In *Permission settings* dialogue box, grant the permission *Administrator Permissions* > *Manage Action Search* > *Allow non-English language users to search in English for Action Search (Including the Tools Section of Admin Center)* to the permission role. Choose *Done*.
5. Still in *Permission Role Detail* screen, choose *Grant this role to...* > *Add...* and grant this permission role to the permission group you've configured for Action Search users in Step 1. In our example, the group is **`Action Search`**. Choose *Done*.

   After being granted with this permission, the employees who are allocated to this permission role can use the cross-language lookup functionality.
6. Save changes.

   To find out how long it takes for your above changes to take effect, see details in How Do Permissions Update When User Information Changes? And if the changes don't take effect within 10 minutes, you could manually refresh the permissions according to Refreshing RBP after Changes in Provisioning Configuration.

Results

Certain employees can now search actions in English in the global header or in the *Tools* section of *Admin Center* even if they log in with non-English language.

Related Information

List of Role-Based Permissions

2.4 How Action Search Works

2.4.1 Actions in Action Search

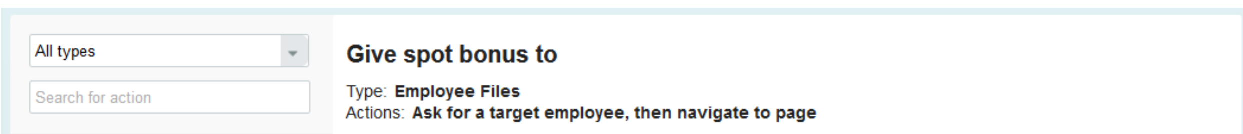
In action search, an "action" refers to a specific system behavior. It describes what the application should do when a user selects a particular search result in action search, such as navigate to a certain page or open a certain dialog window. Finding the right action helps the user accomplish a task more quickly by taking them where they need to go.

Actions are defined by the following properties:

The following table describes action properties:

Property	Description
Action name	This is an internal name visible only in *Manage Action Search*. It is not visible to end-users.
Action type	For default actions, this is the name of the SAP SuccessFactors solution with which the action is performed. For custom actions, the action type is *Custom*.
Action behavior	This is the system behavior that results when users select a corresponding paraphrase in search results. There are three possible action behaviors: • navigate to page (URL) • ask for target and then navigate to page • open pop-up

Actions properties are displayed at the top of the *Manage Action Search* page. For example, here are the action properties of the action *Give Spot Bonus To*:



> ⓘ Note
>
> Properties of default actions are system-defined and cannot be edited or deleted. Properties of custom actions are changed using the *Configure Custom Navigation* tool.

2.4.2 Paraphrases of an Action

In action search, a "paraphrase" defines how users can search for and find actions. Paraphrases define the search terms that can be used to find a particular action and how it appears in search results.

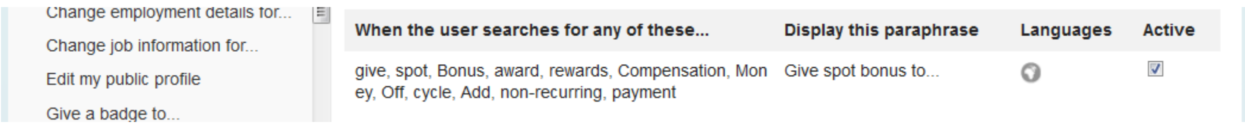
In other words, paraphrases describe user intentions, a specific task that a user wants to perform. One action can be associated with any number of paraphrases.

A paraphrase consists of the following attributes:

Attribute	Description
Search terms	These are the search terms associated with the paraphrase. Search terms can be one or more words in length and are separated by commas. Search terms do not have to be unique. Different paraphrases can share the same search terms.

Attribute	Description
Display label	This is the text label displayed in the action search results. One action might have multiple paraphrases and, therefore, multiple display labels appear in search results. This allows you to search for and trigger the same action in multiple ways. If two paraphrases share an identical display label, they are not duplicated in search results. They behave as one paraphrase and the display label appears only once.
Action status	This checkbox indicates whether the paraphrase is active or not. Paraphrases marked as “active” are included in action search results. An unchecked paraphrase is inactive and is not available to end users. Only paraphrases can be marked as "active" or "inactive", not actions. An action is disabled by marking as "inactive", or deleting, all of its associated paraphrases.

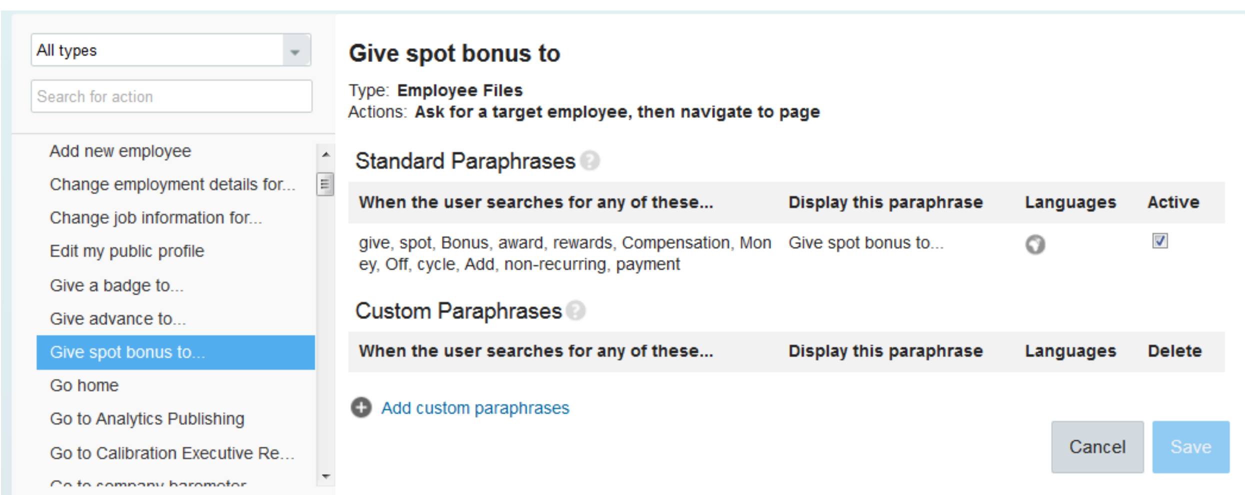
You can view paraphrases for each action in the *Manage Action Search* tool. For example, here is a paraphrase of the action *Give Spot Bonus To*:



> **Note**
>
> In this example, the name of the action and the display label of the paraphrase are the same (*Give Spot Bonus To*), but this is not always the case. Remember: the action name is an internal name that isn't visible to users but the paraphrase display label

2.4.2.1 Actions with One Paraphrase

To better understand the difference between action properties and paraphrases, take a look again at the details of the default action *Give Spot Bonus To*.



In this example, the action properties indicate that this action is part of Employee Files (the name given to Employee Central in this instance) and that, when triggered, you will first be asked to select a target employee and then navigated to the appropriate page.

There is only one paraphrase defined for this action. You can see that this paraphrase is active and, therefore, is currently available in action search. Therefore, if you enter any of the search terms defined for this paraphrase—such as **`give`**, **`spot`**, **`bonus`**, or **`reward`** — the paraphrase's display label *Give spot bonus to...* is included in the action search results.

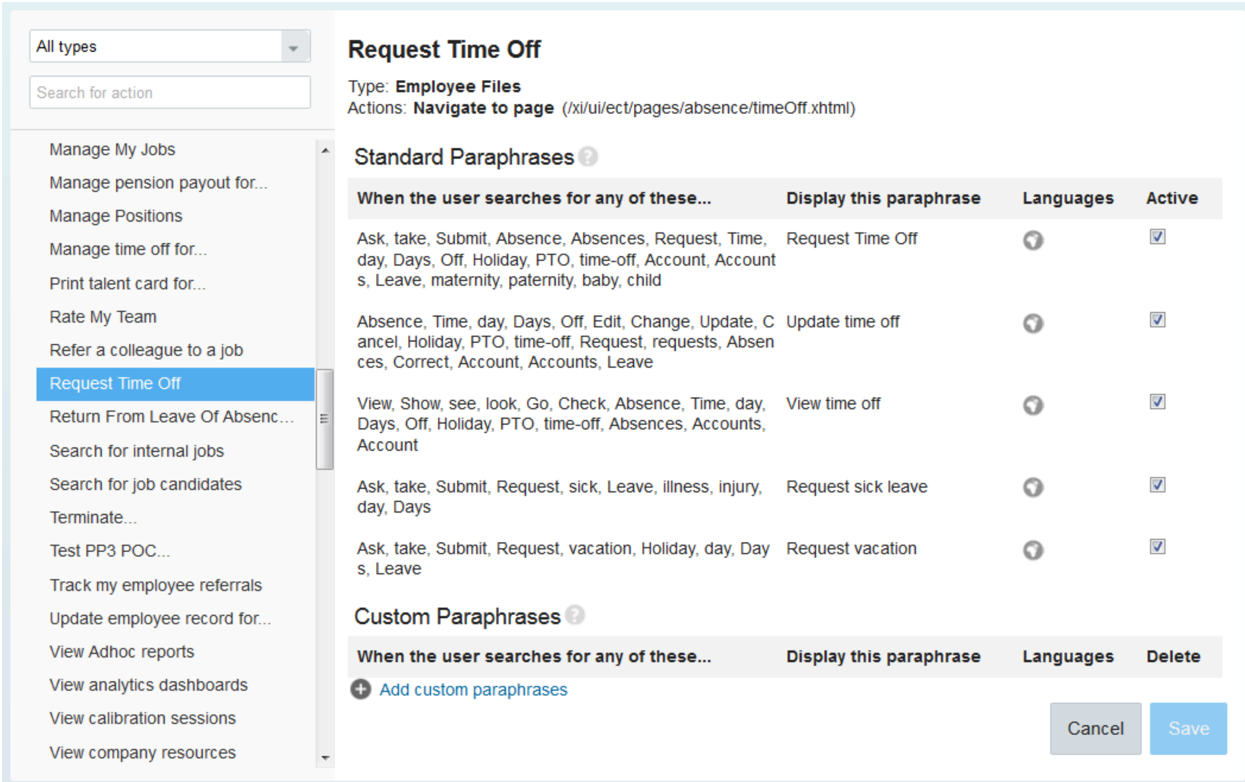
2.4.2.2 Actions with Multiple Paraphrases

Why Use Multiple Paraphrases

One action can be associated with multiple paraphrases. This is useful when if there are several different reasons why you might want to visit a particular application page. For example, you might want to visit your employee profile in order to change information or to view information. The paraphrases *View my profile* and *Update my profile* reflect different user intentions— in one case, you're thinking "I want to look up some information on my profile" and, in the other, you might be thinking, for example, "I want to change my address." However, both of these actions are performed on the same page in Employee Files, so both of these paraphrases are associated with the same system action. Selecting either of these paraphrases from action search results navigates you to the appropriate page of your profile.

Example

Now, look at another example with multiple paraphrases. Below are details of the default action *Request Time Off*.



In this example, you can see that the *Request Time Off* action is also part of Employee Files and that, by selecting the action, you're navigated directly to the appropriate page (at the URL indicated). This action does not require a target user.

This action is associated with five different paraphrases. Each paraphrase triggers the same action—i.e., navigates to the same page, but each reflects a different user intention. You might want to request sick leave or vacation time or another type absence, or you might want to view or edit your existing absences.

Look at the first paraphrase, in row four. If you enter any of the associated search terms— such as **`request`**, **`sick`**, **`leave`**, **`ask`**, or **`submit`** — the paraphrase *Request sick leave* appears in the search results. Selecting this action navigates you to the URL indicated, where you can request sick leave.

Now, look at the fifth paraphrase. Similarly, you might type the term **`vacation`** or **`holiday`** and be presented with the paraphrase *Request vacation*. Selecting this action navigates you to the same URL, where you can also request vacation time.

You might also type a more general term like **`leave`** or **`days`** or **`request`**, which are defined as search terms for both of these paraphrases. In this case, only one of the paraphrases is displayed in action search results, as are any other paraphrases containing these terms.

In this way, you're able to search for and view actions in your own words, without knowing the technical name of a particular application page or tool or the navigation path that leads to it. You can just tell action search what you want to do, and get it done quickly.

2.4.3 Default Actions and Custom Actions

There are two types of actions in action search: default actions and custom actions.

Default actions are a built-in part of the action search feature and are shared by all SAP SuccessFactors customers. They are available in every instance, based on its configuration. Each default action is delivered with one or more standard paraphrases.

Custom actions are actions that you create and that are specific to your instance.

> → Remember
>
> "Actions" describe system behavior, so, adding a "custom action" means introducing new system behavior—that is, the ability to navigate to new location with action search that is not included among the default actions.
>
> It is **not** just a new way of searching for or displaying a default action. If you want to introduce a new way for users to search for and find an existing default action, create a new paraphrase, not a new action.

2.4.4 Standard Paraphrases and Custom Paraphrases

There are two types of paraphrases in action search: standard paraphrases and custom paraphrases.

Standard paraphrases are a built-in part of the action search feature and are shared by all SAP SuccessFactors instances. Therefore, you cannot edit or delete standard paraphrases. You can, however, choose to disable a standard paraphrase so that it doesn't appear in action search results in your instance.

Custom paraphrases are paraphrases that you create and that are specific to your instance. You can add, edit, or delete custom paraphrases. You can customize the end-user behavior of action search by:

- Disabling a standard paraphrase and replacing it with a new custom paraphrase
- Adding additional custom paraphrases to complement a standard paraphrase.

2.5 Action Search Use Cases

You can use a combination of standard and custom paraphrases to customize the behavior of action search for end-users. Here are a few example use cases to illustrate how to achieve different results.

Use Case	What You Need to Do
You have an internal career development program called “Pathway to Success” that uses the SAP SuccessFactors career worksheet. You think people in your company are likely to search using this internal name, so you want to add the search terms "pathway" and "success" to the standard paraphrases *View my career worksheet* and *Plan my career*.	• Create a custom paraphrase with new search terms but the same display labels as the standard paraphrase. • Disable the standard paraphrase.

Use Case	What You Need to Do
You have an internal career development program called “Path-way to Success” that uses the SAP SuccessFactors career worksheet. You think people in your company are likely to search using this internal name, so you want to add the search terms "pathway" and "success" to the search terms. You also want these search terms to return a search result that says *Pathway to Success*.	• Create a custom paraphrase with new search terms and a new display label. • Disable the standard paraphrase.
You use employee profile badges for peer-to-peer recognition in your company, but you don’t use the term “badge”. Instead, you want it to say *Recognize*.	• Create a custom paraphrase with a new display label but the same search terms as the standard paraphrase. • Disable the standard paraphrase.
You use the skills management portlet on the employee profile. The standard paraphrase says simply *View my profile*. To en-courage people to update the skills on their profile, you might users who search for "skills" or similar words to see a search result for "Update my skills" that would take them to their employee profile.	• Create a custom paraphrase with new search terms and a new display label.

2.5.1 Changing Search Terms for a Default Action

As an administrator, you can add additional search terms to a default action.

Context

> → Remember
>
> Paraphrases define the end-user behavior of an action. To change search behavior that leads to a particular action, you need to create a custom paraphrase of that action.

Procedure

1. Create a new custom paraphrase, using the option to *Copy to custom* to create a copy of the standard paraphrase.

   > ⓘ Note
   >
   > Using the *Copy to custom* option ensures that the display label is unchanged and identical to the standard paraphrase.

2. Edit search terms as desired. You can add new search terms or remove default ones.
3. Disable the standard paraphrase.

> ⓘ Note
>
> Technically, this step is not necessary. Action Search recognizes paraphrases with identical display labels and does not display them as duplicate search results. As a best practice, however, it is less confusing as an administrator to manage only one paraphrase for a given display label.

4. Save changes.

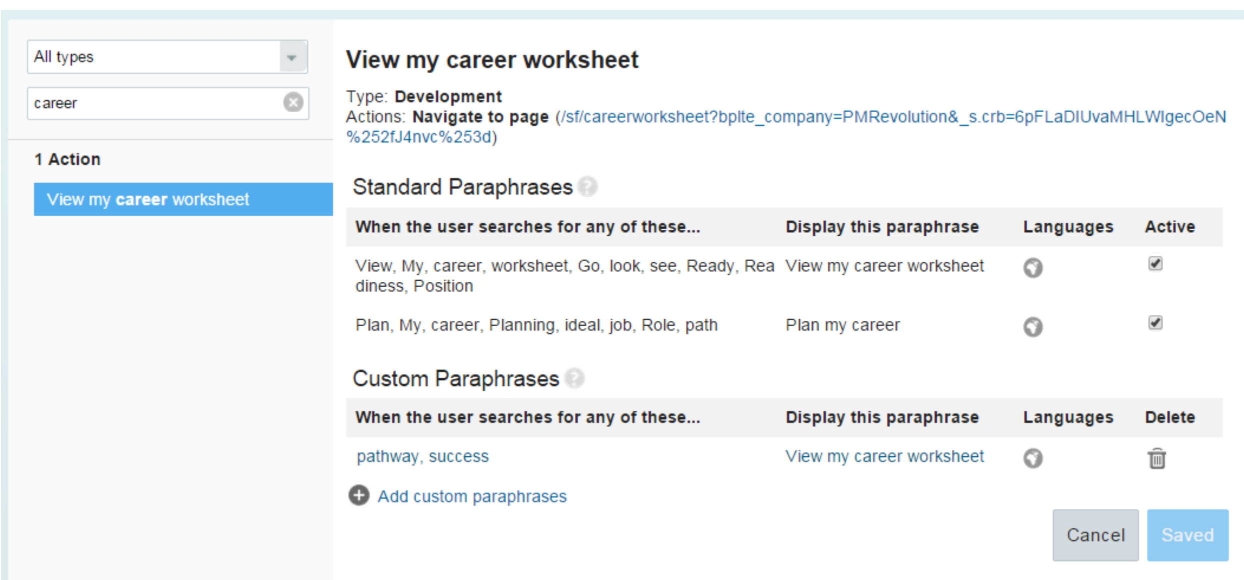
Results

The search terms you added now also return the same search result defined in the standard paraphrase.

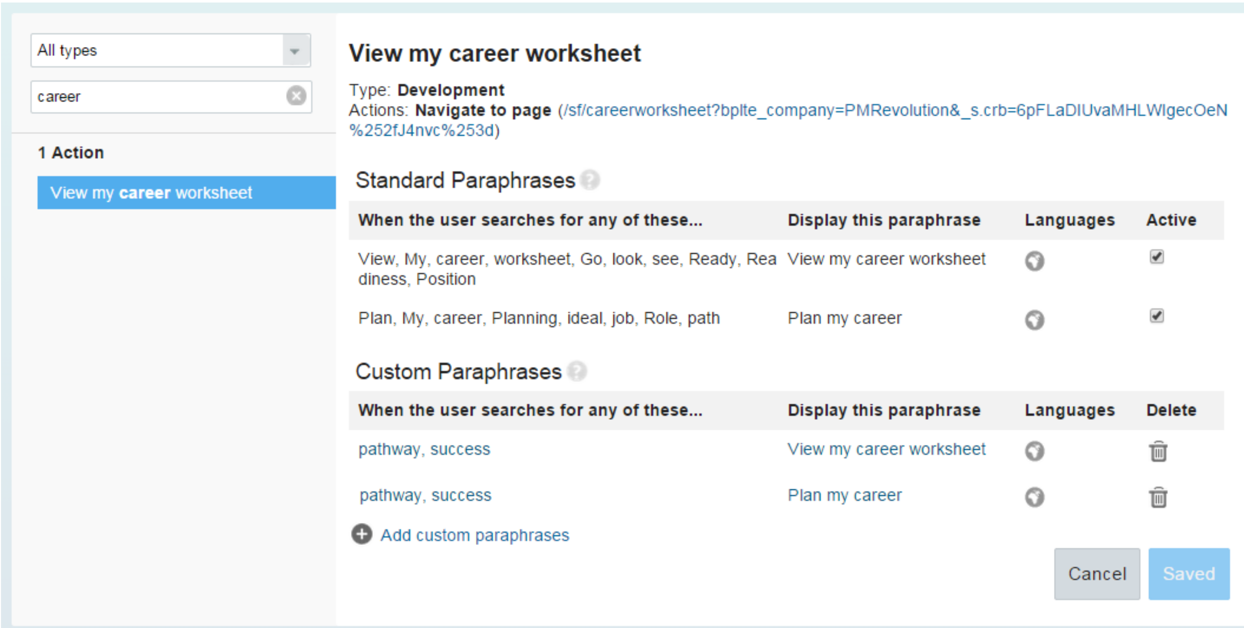
Example

For example, let's say you have an internal career development program called "Pathway to Success" that uses the SAP SuccessFactors career worksheet. You think people in your company are likely to search for the career worksheet using this internal name, so you want to add the search terms pathway and success to the default action *View my career worksheet*.

To do this, you would create a custom paraphrase re-using the standard display label (*View my career worksheet*) but with added search terms (**`pathway`** and **`success`**), as shown here:



In this scenario, you might want to also add these new search terms to the other standard paraphrase for this action, *Plan my career*. In the same way, you can add another custom paraphrase using the *Plan my career* display label, as shown here:



Now, if you search for **`pathway`** or **`success`**, you see both options—*View my career worksheet* and *Plan my career* — in action search results.

Related Information

Adding a New Custom Paraphrase in the Admin UI [page 68]
Disabling a Standard Paraphrase [page 67]

2.5.2 Changing the Search Results for a Default Action

As an administrator, you can change the display label or labels shown in search results for a default action.

Context

> → Remember
>
> Paraphrases define the end-user behavior of an action. To change search behavior that leads to a particular action, you need to create a custom paraphrase of that action.

Procedure

1. Create a new custom paraphrase, using the option to *Copy to custom* to create a copy of the standard paraphrase.

> **Note**
>
> Using the *Copy to custom* option ensures that the search terms are unchanged and identical to the standard paraphrase.

2. Add a new display label.
3. Disable the standard paraphrase.
4. Save changes.

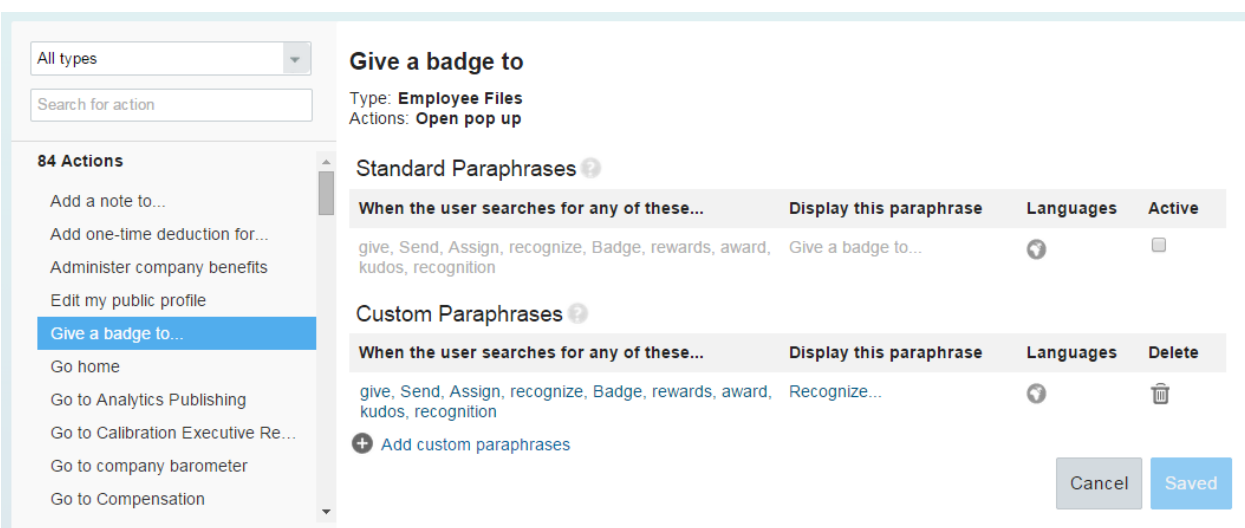
Results

The default search terms in the standard paraphrase now return a search result to end users using your new display label. The target of the action (usually a page in the application) is unchanged.

Example

For example, suppose you use employee profile badges for peer-to-peer recognition in your company, but you don't use the term "badge". Instead, you want it to say "Recognize."

To do this, you would disable the standard paraphrase *Give a badge to*, and then create a custom paraphrase using the same search terms (copied from the standard paraphrase) but with the new display label (`Recognize…`), as shown here:



Related Information

Adding a New Custom Paraphrase in the Admin UI [page 68]
Disabling a Standard Paraphrase [page 67]

2.5.3 Changing Both Search Terms and Search Results for a Default Action

As an administrator, you change both the search terms and the display for a default action.

Context

> → Remember
>
> Paraphrases define the end-user behavior of an action. To change search behavior that leads to a particular action, you need to create a custom paraphrase of that action.

Procedure

1. Create a custom paraphrase.
    - If the search terms and label you want to use are similar to an existing standard paraphrase, use the *Copy to custom* option.
    - If the search terms and label you want to use are very different, use the *Add custom paraphrase* option to start from scratch.
2. Add your search terms and display label.
3. Disable the standard paraphrase that you want to replace.
4. Save changes.

Results

New search terms return the new display label. The disabled paraphrase is no longer available and will not appear in search results.

Example

For example, let’s say you have an internal career development program called “Pathway to Success” that uses the SAP SuccessFactors career worksheet. You think people in your company are likely to search using this internal name, so you want to add the search terms "pathway" and "success" to the search terms. You also want these search terms to return a search result that says *Pathway to Success*.

Related Information

Changing Search Terms for a Default Action [page 58]
Changing the Search Results for a Default Action [page 60]
Adding a New Custom Paraphrase in the Admin UI [page 68]
Disabling a Standard Paraphrase [page 67]

2.5.4 Adding a New Search Result to a Default Action

As an administrator, you can add a brand new search result to a default action.

Context

> → Remember
>
> Paraphrases define the end-user behavior of an action. To add new search behavior that leads to a particular action, you need to create a new custom paraphrase of that action.

Procedure

1. Create a custom paraphrase, using the *Add custom paraphrase* option.
2. Add your search terms and display label.
3. Save changes.

Results

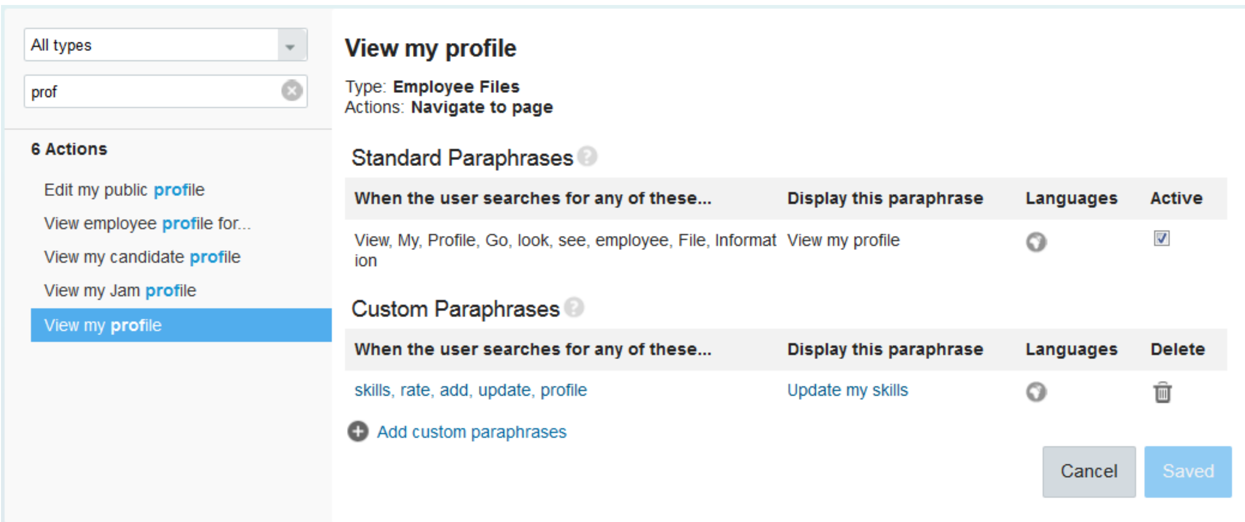
Your new search terms will return your new display label. Other existing paraphrases are unchanged and are still available in search results.

Example

You might also want to add a whole new search option to the existing search results for a default action. In this case, rather than just change the on-screen terminology, you want to describe a whole new task that users can perform on a page already supported in action search, but not yet included in the standard paraphrases. You can do this by adding a new custom paraphrase, while leaving the standard paraphrases active. This gives users a new way of finding and triggering the existing default action.

For example, imagine you use the skills management portlet on the employee profile. The standard paraphrase says simply *View my profile*. To encourage people to update the skills on their profile, you might want users who search for "skills" or similar words to see a search result for "Update my skills" that would take them to their employee profile.

To do this you would create a custom paraphrase, using new search terms such as **`skills`**, **`rate`**, **`add`**, **`update`**, **`profile`**, etc.) and a new display label such as **`Update my skills`**), as shown here:



2.5.5 Removing a Default Action from Action Search

As an administrator, you can remove paraphrases of a default action so that they no longer appear in search results.

In general, the more options that are included in action search results, the better. Because search results respect system configuration and permissions, users should only see actions that they are already able to perform elsewhere in the application. Action search just makes finding and navigating to those actions quicker and easier.

However, if, for some reason you want to remove certain actions from action search entirely, you can do this by disabling any unwanted standard paraphrases and deleting any unwanted custom paraphrases.

Related Information

Disabling a Standard Paraphrase [page 67]

Deleting a Custom Paraphrase [page 78]

2.6 Action Search Configuration Tool

The *Manage Action Search* tool enables you to configure action search to change its default behavior.

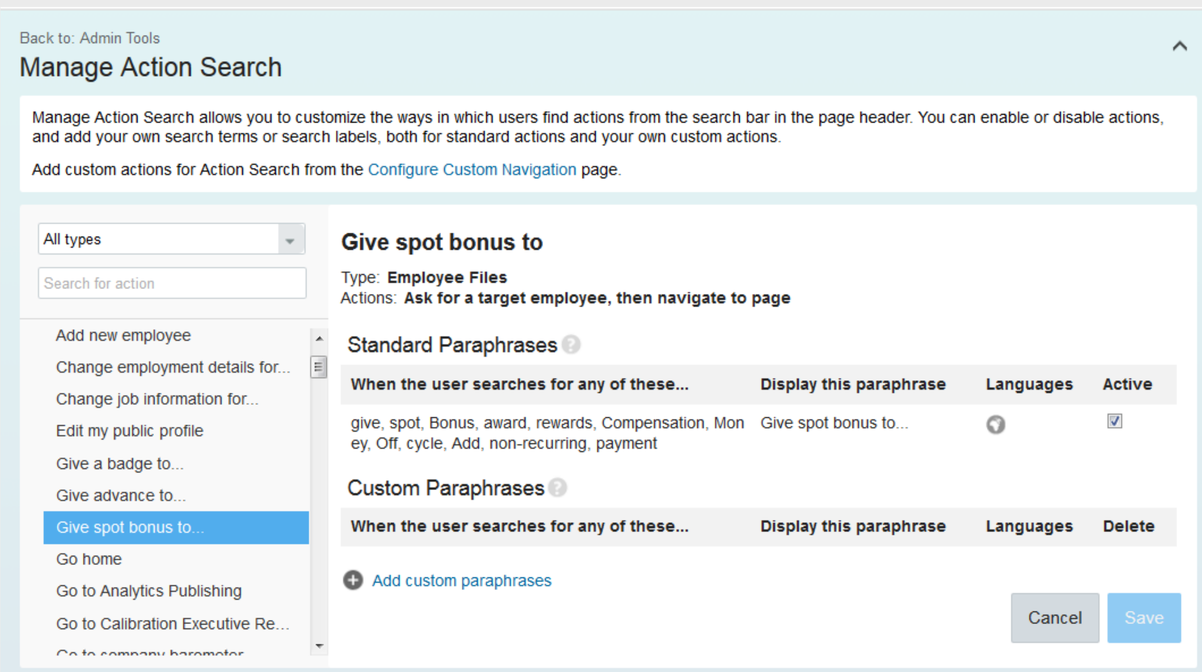
Viewing the Available Actions

A large number of system-defined actions are available by default, based on your instance configuration. You can also create new custom actions. A full list of all the available actions—both default and custom— is visible in a filterable side panel of the *Manage Action Search* tool.

When you select an action in the filter panel, more details about that action are displayed. Action details include action properties, standard paraphrases, and custom paraphrases.

Example

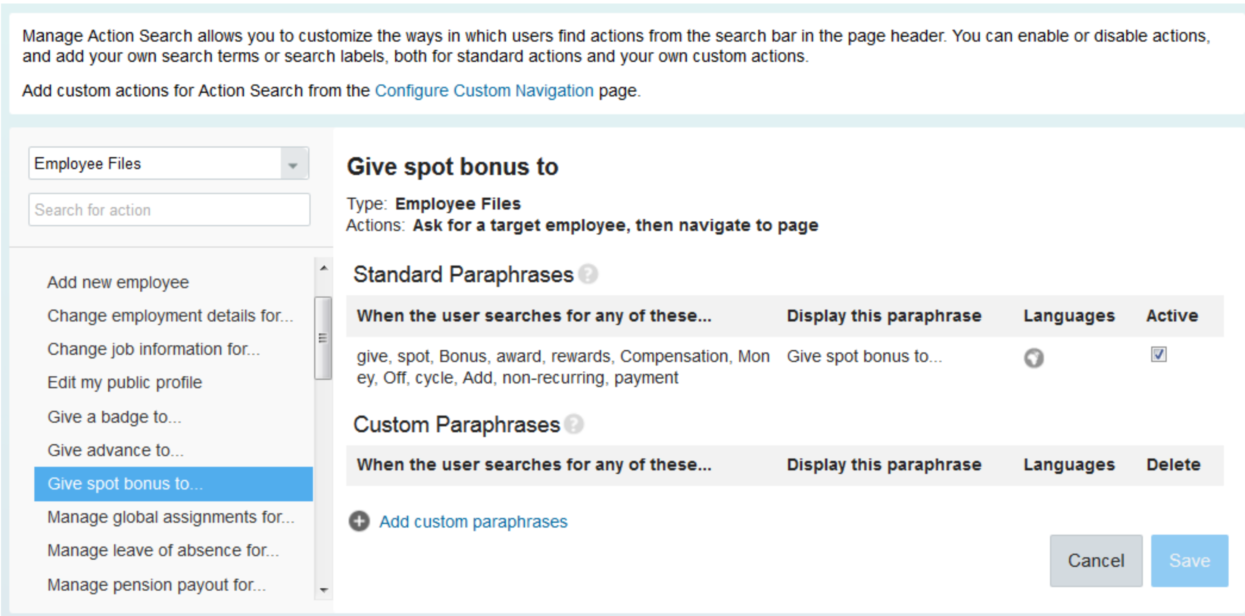
In the following example, you can details about the action *Give Spot Bonus To*.



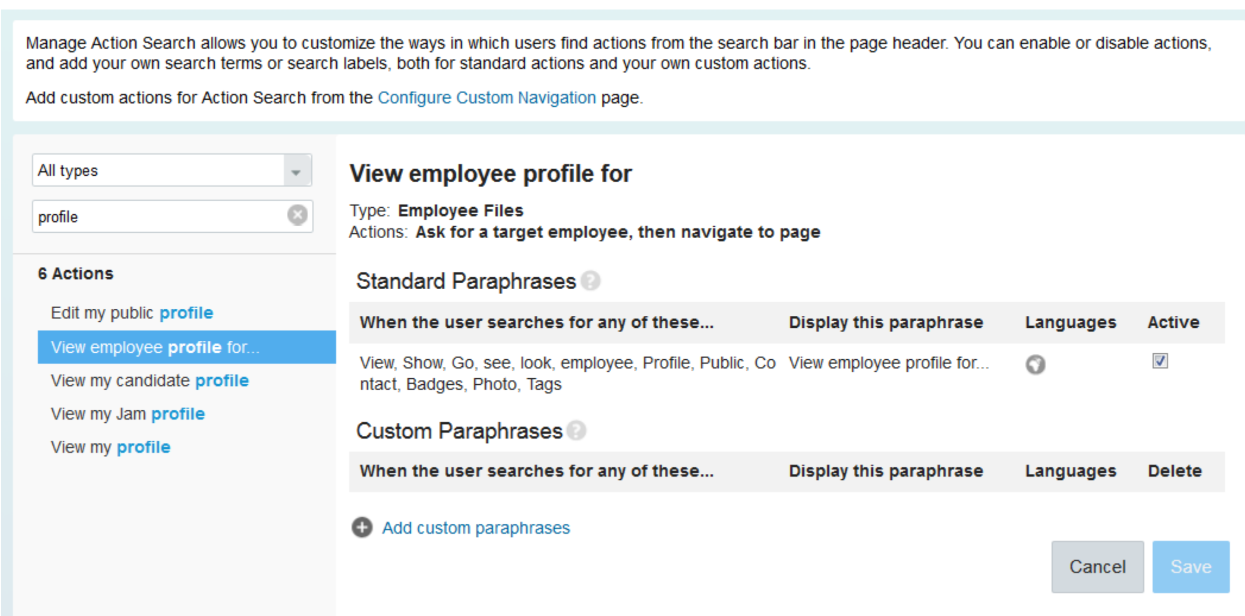
Filtering Available Actions

You can filter the list in the filter panel to find actions more quickly. You can filter by solution (e.g., Analytics, Calibration, Performance, etc.) or you can search for actions by name.

In the following example, the filter is used to display only actions in *Employee Files*:



In this example, the search term **`profile`** is used to display all of the actions containing that word in their name:



Viewing Action Details

After you have selected an action in the filter panel, you can see information about that action in the details panel. Details are divided into two areas- action properties and paraphrases of the action.

> ⓘ Note
>
> Important
>
> Understanding the difference between an “action” and a “paraphrase" is critical to using the *Manage Action Search* tool and to understanding the behavior of action search. This distinction is explained further in the following sections.

2.7 Managing Action Search

2.7.1 Disabling a Standard Paraphrase

As an administrator, you can disable a standard paraphrase.

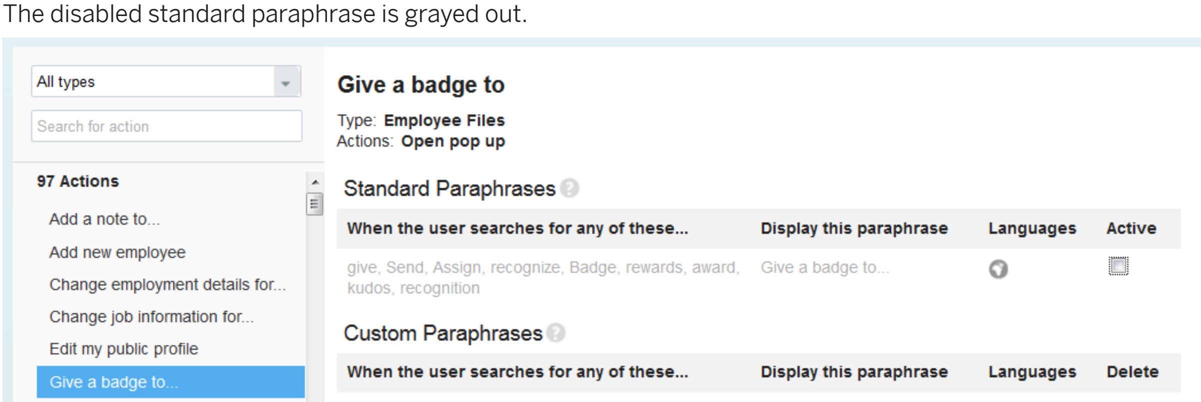
Prerequisites

- *Manage Action Search* permission

Procedure

1. Go to *Manage Action Search* and find the standard paraphrase you want to disable.
2. Click the gear icon next to the standard paraphrase and select *Inactivate*.

   The disabled standard paraphrase is grayed out.



Results

The disabled standard paraphrases are no longer visible in search results for end users.

2.7.2 Adding a New Custom Paraphrase in the Admin UI

Add a custom paraphrase to any action using the *Manage Action Search* tool.

Prerequisites

- *Manage Action Search* permission

Context

There are two ways to create or edit custom paraphrases: one-by-one in the UI or in bulk with a CSV import. If you want to add or edit a single custom paraphrase, use the *Manage Action Search* admin tool. If you want to add or edit multiple custom paraphrases at once or localize custom paraphrases in different languages, use the CSV import.

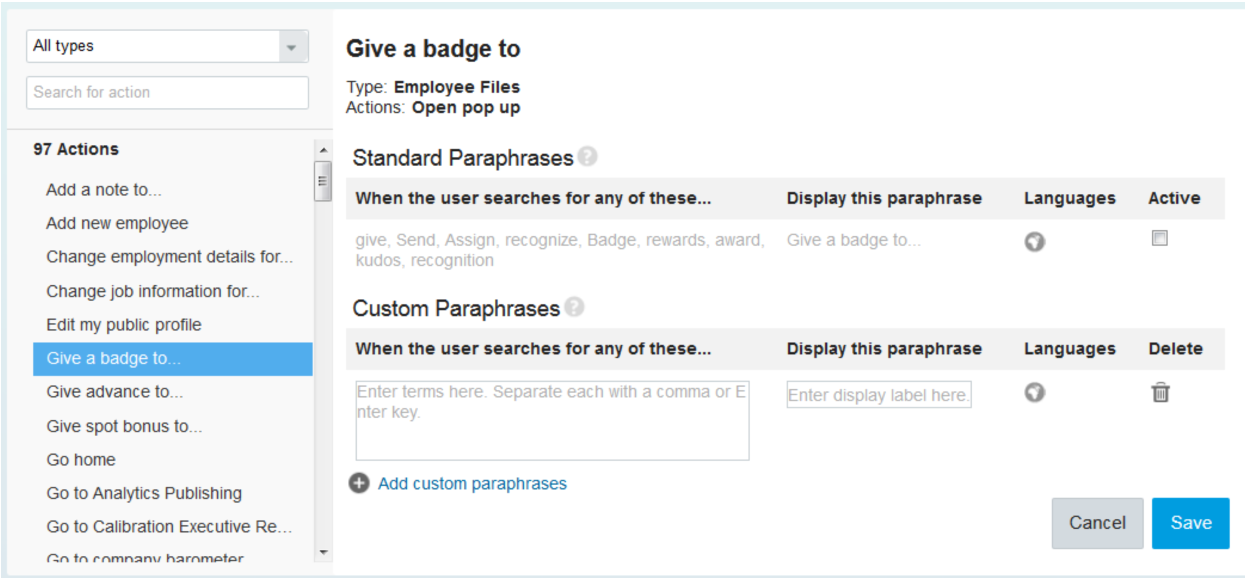
Procedure

1. Go to *Manage Action Search* and find the action to which you want to add a paraphrase.
2. Choose one of the following options:
   - Click the "gear" icon next to the standard paraphrase and select *Copy to custom* to copy the search terms and label into a new custom paraphrase
   - Click *Add custom paraphrase* to create a new blank paraphrase.
3. Enter search terms for your new paraphrase.
   Search terms can be multi-word and are separated by a comma or by hitting `Enter`.
4. Enter a display label for your new paraphrase.

   Display labels can be any text string. By convention, standard paraphrases of transitive actions use a display label ending with an ellipsis (...) to indicate that the user needs to select a target of the action, but this is not required.
5. Click *Save*.

Example

The following example shows a new custom paraphrase in edit mode:



2.7.3 Editing an Existing Custom Paraphrase in the Admin UI

Edit search terms or the display label of an existing custom paraphrase in the *Manage Action Search* admin tool.

Prerequisites

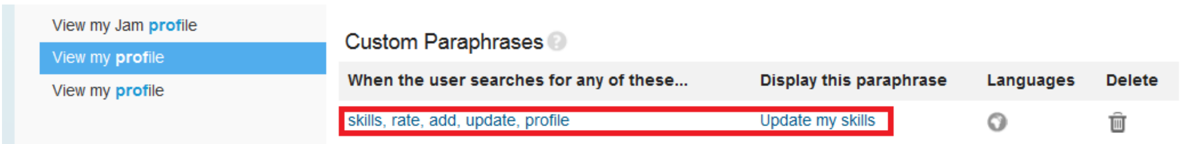
- *Manage Action Search* permission

Context

There are two ways to create or edit custom paraphrases: one-by-one in the UI or in bulk with a CSV import. If you want to add or edit a single custom paraphrase, use the *Manage Action Search* admin tool. If you want to add or edit multiple custom paraphrases at once or localize custom paraphrases in different languages, use the CSV import.

Procedure

1. Go to *Manage Action Search* and find the action and the custom paraphrase that you want to edit.
2. Click any of the search terms or the display label to enter edit mode.



3. Make your changes to search terms or display label.
4. Click *Save*.

2.7.4 Adding or Editing Paraphrases with a CSV Import

Add or edit any number of custom paraphrases at once using a CSV import.

Context

There are two ways to create or edit custom paraphrases: one-by-one in the UI or in bulk with a CSV import. If you want to add or edit a single custom paraphrase, use the *Manage Action Search* admin tool. If you want to add or edit multiple custom paraphrases at once or localize custom paraphrases in different languages, use the CSV import.

1. Exporting a List of Paraphrases as a CSV File [page 70]
   Export a list of all the standard and custom paraphrases for a given locale as a CSV file.
2. Editing Paraphrases in a CSV File [page 73]
3. Importing Custom Paraphrases as a CSV File [page 77]

2.7.4.1 Exporting a List of Paraphrases as a CSV File

Export a list of all the standard and custom paraphrases for a given locale as a CSV file.

Prerequisites

- *Manage Action Search* permission

Context

There are two ways to create or edit custom paraphrases: one-by-one in the UI or in bulk with a CSV import. If you want to add or edit a single custom paraphrase, use the *Manage Action Search* admin tool. If you want to add or edit multiple custom paraphrases at once or localize custom paraphrases in different languages, use the CSV import.

This is the first step in the process of adding or editing paraphrase with a CSV import. You may also simply want to keep an export file as a reference.

Procedure

1. Go to *Manage Action Search*.
2. Click the link to *go to the import and export page*.
3. In the *File Locale* menu, select the locale for which you want to export paraphrases.

   You can download one export file for each locale used in your instance.
4. For locales that require a specific character encoding, such as Chinese, use the *File Encoding* menu to select the correct encoding type.
5. Click the link *Current Paraphrases* to download the CSV to your computer's temp folder.
6. Open the CSV file in a spreadsheet (such as Microsoft Excel) for easier editing and save it to the desired location on your machine or network.

Results

You can now use this export file as a template for creating and importing new custom paraphrases. Or, you can keep the export file as a reference list of all the available actions and paraphrases.

Task overview: Adding or Editing Paraphrases with a CSV Import [page 70]

Next task: Editing Paraphrases in a CSV File [page 73]

2.7.4.1.1 Contents of the Paraphrase CSV Export

Understand the contents of your paraphrase export file and how to use it.

> ⚠ Caution
>
> The export file contains some information that need and other information you do not. Be sure to edit only the required data and nothing else or your import will fail.
>
> The table below describes each of the attributes contained in the CSV export and how to use them.

Paraphrase Attribute	Description
actionType	The type of paraphrase, *standard* or *custom*. To create a new custom paraphrase, use an existing *standard* paraphrase as a template. To change an existing *custom* paraphrase, edit the *searchTerms* and/or *label* values.
paraphraseId	A system-generated unique identifier for each paraphrase. Editable custom paraphrases have a *paraphraseId* with the prefix **`pid_`** followed by a long string of characters, such as **`pid_1ee5dbc9-168e-4bbc-bb6e-b1b6de4409da`** To create a paraphrase, leave the *paraphraseId* value blank and the system will generate one during import. To change an existing paraphrase, edit the *searchTerms* and/or *label* values but do not change the *paraphraseId*. ⚠ Caution Never change or create a *paraphraseId* or your import will fail. Always use an existing system-generated value or leave the column blank.
actionId	A system-generated unique identifier that associates each paraphrase with an existing system action. This is the action that is triggered when a user selects the paraphrase from search results. To create a new paraphrase, use an existing paraphrase as a template, keeping the *actionId* value unchanged. ⚠ Caution Never change or create an *actionId* or your import will fail. Always use an existing system-generated value.
searchTerms	Search terms people can use to find the paraphrase in search results. You can add or edit search terms, separated by commas, in the CSV file.
label	Display label shown in search results. You can edit display labels in the CSV file.
module	Internal category indicating the SAP SuccessFactors solution related to the action. ⚠ Caution Do not change these values.
link	Internal target of the paraphrase, usually a URL ⚠ Caution Do not change these values.

2.7.4.2 Editing Paraphrases in a CSV File

Task overview: Adding or Editing Paraphrases with a CSV Import [page 70]

Previous task: Exporting a List of Paraphrases as a CSV File [page 70]

Next task: Importing Custom Paraphrases as a CSV File [page 77]

2.7.4.2.1 Adding New Custom Paraphrases in a CSV File

Add new custom paraphrases to your offline CSV to prepare it for import.

Prerequisites

A saved CSV export of current paraphrases in your instance

Context

Create a new custom paraphrase when you want to:

- Edit the search terms or display label of an existing standard paraphrase
- Create an all-new paraphrase of any action

If you want to change the search terms or display label of an existing **custom** paraphrase, do **not** follow these steps. Instead, follow steps for editing existing custom paraphrases in a CSV file.

Procedure

1. Open your CSV export of current paraphrases in a spreadsheet, such as Microsoft Excel.
2. In the CSV file, find a row containing an existing paraphrase of the action that you can use as a template.

   For example, if you wanted to edit the standard paraphrase *Go home*, you would look for the row with *Go home* in the *label* column. You would find it in the row with a *paraphraseId* value of **`pid_54-1`**, a system-defined unique identifier.

3. Insert a new row at the end of your CSV file and copy-and-paste the contents the existing row you are using as a template, creating a duplicate.

   > → Tip
   >
   > Add your new row at the end of your file or in a new sheet, rather than insert it within the exported list of current paraphrases. Later, you will delete the current paraphrases from your file and only import the change. So, be careful to keep them separate.

4. In your new duplicate row, delete the *paraphraseId* value and leave the cell in this column blank.

   Now, you have a new row that is exactly the same as an existing row, minus the *paraphraseId*. When this new row is imported into your instance, the system will generate a new unique *paraphraseId*, thus creating a new custom paraphrase.
5. In your new duplicate row (without a *paraphraseId*), edit the *searchTerms* and *label* columns as desired. You can:
   - Make edits to the existing values, such as adding search terms or rewording the display label
   - Delete the existing values and start from scratch to create an all-new paraphrase

   > ⚠ Caution
   >
   > Do not change the *actionId*. This is a system-generated unique identifier that is required to associate your new custom paraphrase with an action. You cannot create new **actions** with the CSV import, only new **paraphrases**, so you cannot import new *actionId* values.

   > ⓘ Note
   >
   > You can ignore the *actionType*, *module*, and *link* columns. The *actionType* value in the CSV is ignored, as any imported paraphrase will be, by definition "custom".

6. Repeat steps for each new custom paraphrase you want to import.
7. Delete all of the unchanged rows for existing paraphrases, so that your file only contains new rows that you have changed.

   > → Tip
   >
   > Paraphrase imports are incremental and do **not** overwrite existing paraphrases, so importing blank rows does **not** delete existing paraphrases. Therefore, you can delete any unchanged rows as a precaution against accidentally changing paraphrases you didn't intend to change.

8. Save your CSV file with a new name, using a naming convention for version control.

Results

You now have your CSV file ready for import.

Example

	A	B	C	D	E	F	G
1	actionType	paraphraseId	actionId	searchTerms	label	module	link
2	standard	pid_54-1	54	Go,Home,Homepage	Go home	Homepage	/sf/home
3							

Standard Paraphrase in CSV Export

	A	B	C	D	E	F	G
1	actionType	paraphraseId	actionId	searchTerms	label	module	link
2	standard		54	Go,Home,Homepage, Page	My Home Page	Homepage	/sf/home
3							

New Custom Paraphrase in CSV Export

Task overview: Editing Paraphrases in a CSV File [page 73]

Related Information

Editing Existing Custom Paraphrases in a CSV File [page 75]
Contents of the Paraphrase CSV Export [page 71]

2.7.4.2.2 Editing Existing Custom Paraphrases in a CSV File

Edit custom paraphrases in your offline CSV to prepare it for import.

Prerequisites

A saved CSV export of current paraphrases in your instance

Context

Edit an existing custom paraphrase when you want to:

- Add or remove search terms of a custom paraphrase
- Change the display label of a custom paraphrase

If you want to change the behavior of an existing **standard** paraphrase, do **not** follow these steps. Instead, follow steps for creating new custom paraphrases in a CSV file.

Procedure

1. Open your CSV export of current paraphrases in a spreadsheet, such as Microsoft Excel.
2. In the CSV file, find the rows corresponding to the existing custom paraphrases you want to edit.

   Custom paraphrases have an *actionType* of **`custom`** and a *paraphraseId* that consists of the prefix **`pid_`** followed by a long string of characters, such as **`pid_1ee5dbc9-168e-4bbc-bb6e-b1b6de4409da`**.

   For example, let's say you have previously added a custom paraphrase *My Homepage* that points to the user's personal home page and you want to change it to read *My Home Page*. You also want to add the search terms "portal" and "launchpad". In the CSV, you would look for a row with **`custom`** in the *actionType* column and *My Homepage* in the *label* column. It will also have a long *paraphraseId* that is unique to your instance.
3. Edit the *searchTerms* and *label* columns as desired, while keeping the *paraphraseId* unchanged.

   > ⓘ Note
   >
   > As long as the *paraphraseId* value remains the same, when the row is imported into your instance, it will be treated as the same pre-existing custom paraphrase. You can ignore the *actionId*, *module* and *link* columns.
4. Repeat steps for each existing custom paraphrase you want to edit.
5. Delete all of the unchanged rows for existing paraphrases, so that your file only contains the rows that you have changed.

   > → Tip
   >
   > Paraphrase imports are incremental and do **not** overwrite existing paraphrases, so importing blank rows does **not** delete existing paraphrases. Therefore, you can delete any unchanged rows as a precaution against accidentally changing paraphrases you didn't intend to change.
6. Save your CSV file with a new name, using a naming convention for version control.

Results

You now have your CSV file ready for import.

Example

	A	B	C	D	E	F	G
1	actionType	paraphraseId	actionId	searchTerms	label	module	link
2	custom	pid_3c8a8503-e49a-4f2e-9816-7fafe7cf4b2c	54	Go,Home,Homepage, Page	My Homepage	Homepage	/sf/home
3							

Existing Custom Paraphrase

	A	B	C	D	E	F	G
1	actionType	paraphraseId	actionId	searchTerms	label	module	link
2	custom	pid_3c8a8503-e49a-4f2e-9816-7fafe7cf4b2c	54	Go,Home,Homepage, Page, Launchpad, Portal	My Home Page	Homepage	/sf/home
3							

Updated Custom Paraphrase

Task overview: Editing Paraphrases in a CSV File [page 73]

Related Information

Adding New Custom Paraphrases in a CSV File [page 73]

2.7.4.3 Importing Custom Paraphrases as a CSV File

Prerequisites

- *Manage Action Search* permission
- A prepared CSV import file containing the paraphrases you want to add or edit

Context

Paraphrase imports are incremental and do **not** overwrite existing paraphrases, so importing blank rows does **not** delete the paraphrases currently present in your instance. Therefore, you can delete any unchanged rows as a precaution against making accidental changes.

Procedure

1. Go to *Manage Action Search*.
2. Click the link to *go to the import and export page*.
3. In the *File Locale* menu, select the locale for which you want to import paraphrases.
4. For locales that require a specific character encoding, such as Chinese, use the *File Encoding* menu to select the correct encoding type.
5. Click *Browse* to select the CSV file you want to import.
6. Click *Import* to import your new or updated paraphrases to your instance.

   > ⓘ Note
   >
   > It may take some time to complete the import and rebuild the search index. Wait until you see a confirmation message indicating your import was successful.

Results

You can now see and use your new paraphrases in action search.

> → Remember
>
> Importing paraphrases with a CSV file does **not** delete any existing paraphrases. If you intended to replace an existing paraphrase with a new one, you still need to disable or delete the old paraphrases in the *Manage Action Search* admin tool.

Task overview: Adding or Editing Paraphrases with a CSV Import [page 70]

Previous task: Editing Paraphrases in a CSV File [page 73]

Related Information

Contents of the Paraphrase CSV Export [page 71]

2.7.5 Deleting a Custom Paraphrase

Delete a custom paraphrase so that it isn't visible in search results.

Prerequisites

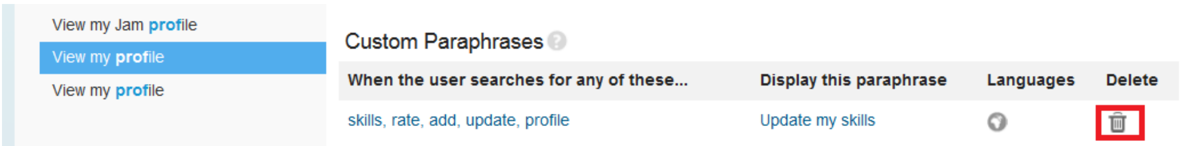
- *Manage Action Search* permission

Context

Unlike standard paraphrases, you cannot mark a custom paraphrase as “inactive." . To remove it from search results, you must delete it.

Procedure

1. Go to *Manage Action Search* and find the custom paraphrase you want to delete.
2. Click 🗑 (*Delete*) next to the custom paraphrase to delete it.



2.7.6 Saving and Viewing Your Changes

You can save your changes in *Manage Action Search* by clicking the *Save* button.

> ⓘ Note
>
> Changes may take up to 30 minutes to be visible in action search results. The action search index is refreshed on a regular basis and your changes will be applied at the time of the next refresh.
>
> Having the permission to *Manage Action Search* does not necessarily mean that you have the access to all actions. To be able to search an item in *Action Search*, you need to have the corresponding permission.

2.8 Managing Custom Actions

2.8.1 Custom Actions

Custom actions are actions that you create and that appear in action search only in your instance.

Currently, there are two supported types of custom actions— custom navigation actions and custom Reporting and Analytics actions.

Custom navigation links enable users to navigate directly from SAP SuccessFactors to an external application or web page. Custom navigation links can be added to many places in the user interface, including action search, using the *Configure Custom Navigation* tool.

Reporting and Analytics actions provide easy access to your new reports and dashboards, directly from action search. Any reports and dashboards that you create after action search is enabled become automatically available in action search without any additional manual steps. Existing reports and dashboards are not included in action search at this time.

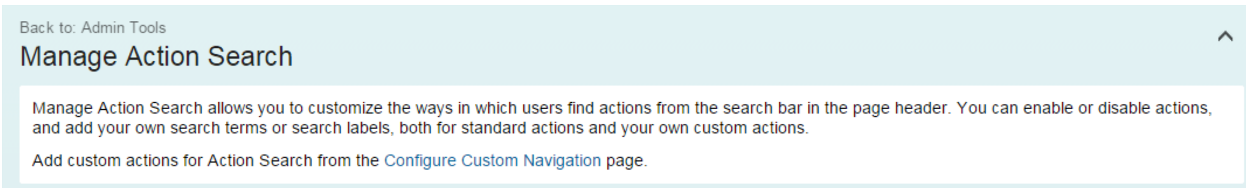
Once you have added the custom navigation actions or custom Reporting and Analytics actions to action search, you can associate them with paraphrases in the usual manner, using *Manage Action Search*.

> ⓘ Note
>
> Custom actions introduce the ability to navigate to a new location that is not accessible using default actions— such as an external URL or a custom report that you've created. They are not just a new option in action search results. Remember, that action search results reflect paraphrases, not actions. So, if you simply want to introduce a new way for users to find an existing action, you only need to add a new custom paraphrase.

2.8.2 Adding Custom Navigation Actions

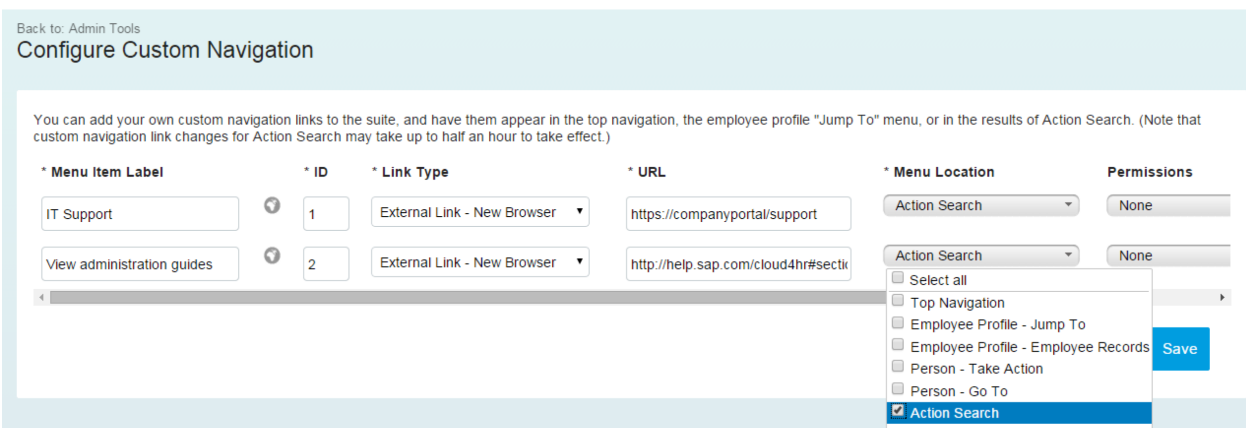
Accessing the Configure Custom Navigation Tool

If *Configure Custom Navigation* is enabled in your instance, you access it by going to *Admin Tools* > *Company Settings* > *Configure Custom Navigation* or by clicking the link to it at the top of the *Manage Action Search* page:



Adding Custom Navigation Links to Action Search

You can add a custom navigation link to action search by selecting *Action Search* as one of the locations in the *Menu Location* dropdown menu of the *Configure Custom Navigation* tool.



Configuring Custom Navigation Links

The following table describes all of the configuration options available in the *Configure Custom Navigation* tool:

Field	Description
Menu Item Label	This is how the link appears in the user interface. For custom actions, this becomes the "display label" in action search.

Field	Description
Localization	**For custom actions, it is recommended that you add localized translations in *Manage Action Search* rather than in *Configure Custom Navigation*.** For other link locations, you can use this icon to access the local editor and provide translations of the menu item label in other languages.
ID	This can be any text or numeric value. You can use any convention you wish, but every custom navigation link, regardless of its location or locations, must have a unique ID.
Link Type	**Custom actions do not reflect these settings. Action search only supports "same browser" behavior. Both internal and external custom navigation actions open in the same browser tab.** For other custom links, you can select: • Internal Link • Used with a SAP SuccessFactors deep link in URL field • External Link - Same Browser • Used with an external URL. Opens in the same browser window. • External Link - New Browser • Used with an external URL. Opens in a new browser window.
URL	Enter the URL or deep link that you want to make available in action search.
Location	To create a custom action, select *Action Search* in the dropdown menu. **For custom actions, it is recommended that you only one select one location, *Action Search*, in this menu. This is due to the fact that localization and link types are handled differently in action search than with other custom link locations.** For other link locations, you can select one or more locations.
Permissions	If you are using role-based permissions, you can use this dropdown menu to select which permission roles and groups can see the custom action. Only members of these roles and groups can see this link in action search.

> **Note**
>
> Custom actions are visible in *Manage Action Search* immediately but may take up to 30 minutes to be visible in action search results. The action search index is refreshed on a regular basis and your changes will be applied at the time of the next refresh.

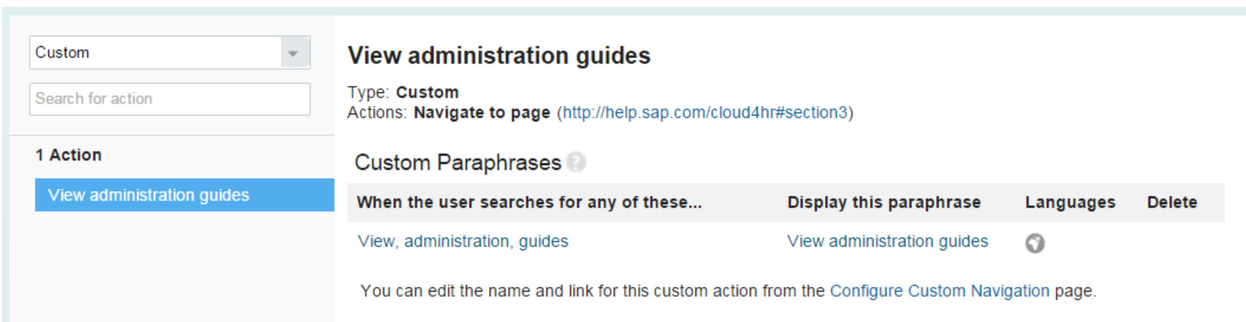
2.8.3 Adding Custom Reporting and Analytics Actions

You do not need to take any additional steps to add newly-created reports and dashboards to action search. Any reports and dashboards that you create after action search is enabled become available in action search automatically. With action search, you can search for new ad hoc reports, ORD reports, and dashboards 2.0—including tiles, collections, standard models, and custom models.

Existing reports and dashboards are not included automatically in action search at this time.

2.8.4 Viewing Custom Actions

Once a custom navigation link or a custom report or dashboard is added to action search, it becomes a custom action. To view all your custom actions, select *Custom* in the filter panel of *Manage Action Search*.



2.8.5 Properties of a Custom Action

For custom navigation actions, the action name of the custom action is the same as the menu item label defined in *Configure Custom Navigation*.

For custom Reporting and Analytics actions, the action name is the same as the name of the report or dashboard. For both types of custom action, the action type is always “custom” and the only supported action behavior is “navigate to page.”

2.8.6 Editing Paraphrases of a Custom Action

Initial Paraphrase

When a custom action is created, one initial paraphrase is automatically created and associated with the action. The display labels reflect either the menu item label defined in *Configure Custom Navigation* or the name of the corresponding report or dashboard. Each word in the display label then becomes a separate search term.

This initial paraphrase of a custom action behaves, for the most part, like any other custom paraphrase and can be edited in a similar manner, but with the following minor differences:

- Unlike other custom paraphrases, you cannot edit the display label in *Manage Action Search*. The display label can only be changed by editing the menu item label, or the name of the corresponding report or dashboard.
- Unlike other paraphrases, you neither delete it nor mark it as "inactive" in *Manage Action Search*. You cannot remove the initial paraphrase of a custom action, unless you remove the action entirely from action search.

Additional Custom Paraphrases

Like default actions, custom actions can be associated with more than one paraphrase. You can create and edit custom paraphrases of custom actions in the same manner as for default actions, as described in the Standard Paraphrases and Custom Paraphrases [page 57] section.

2.8.7 Deleting a Custom Action

Delete a custom action so that it is removed from action search.

To delete a custom navigation action, go to *Admin Tools* > *Company Settings* > *Configure Custom Navigation* and uncheck *Action Search* in the menu location dropdown of the appropriate custom navigation. Save your changes.

To delete a custom Reporting and Analytics action, remove the corresponding report or dashboard.

> **Note**
>
> Deleted custom actions are removed from the *Manage Action Search* page immediately but may take up to 30 minutes to disappear from search results.

2.9 Search Results Ranking

Search result ranking is a process of sorting the results from most to least relevant (that is, in descending score order) in accordance with the keywords used in a user query.

Action Search returns the results whose search terms are fully matched or prefix-partially matched with every keyword in a user query. In the dropdown list of the search results, the actions are displayed in a particular order. Generally, Action Search distributes rankings to action candidates based on the display label (higher weighting) or custom search terms (lower weighting) entered by the user, which means an action with more relevant keywords gets higher match score and higher ranking. If the keywords used in a user query match at least one of the defined search terms of an action in *Manage Action Search*, Action Search scores that action and gives it the corresponding ranking. And usually, the fully matched actions get higher rankings than partially matched ones.

Related Information

Paraphrases of an Action [page 53]

2.10 Localizing Action Search

Introduction

Action search is available in all forty languages supported by the SAP SuccessFactors application. Action search appears in the same language as the rest of the application, based on the language packs configured in your instance and the user's language preference setting.

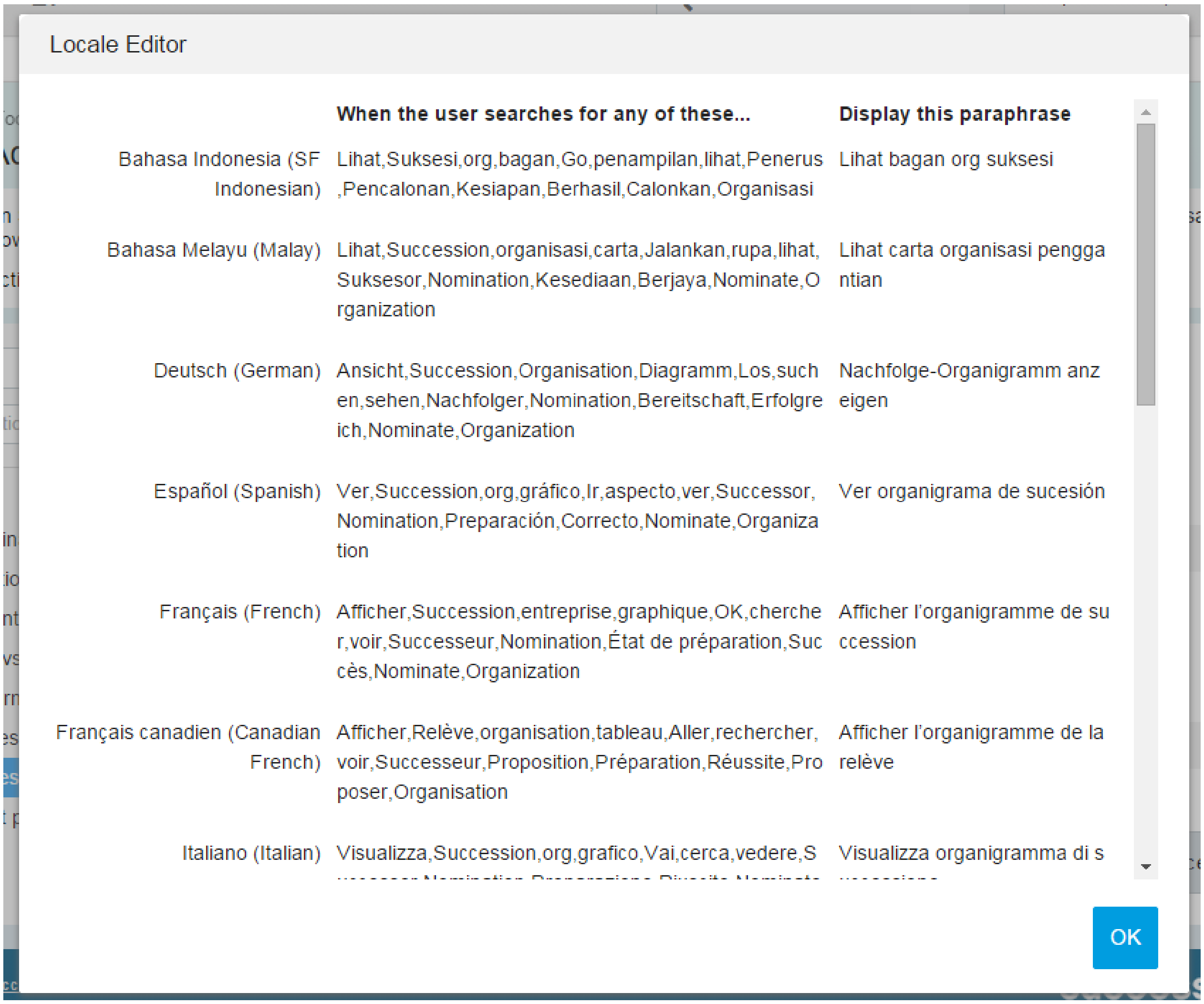
Default text is translated and localized automatically, as the rest of the application. You can use *Manage Action Search* to add translations of custom text, such as display labels and search terms.

Viewing and Editing Translations

You can use the localization icon to access the local editor, where you can view or edit translations of a paraphrase.

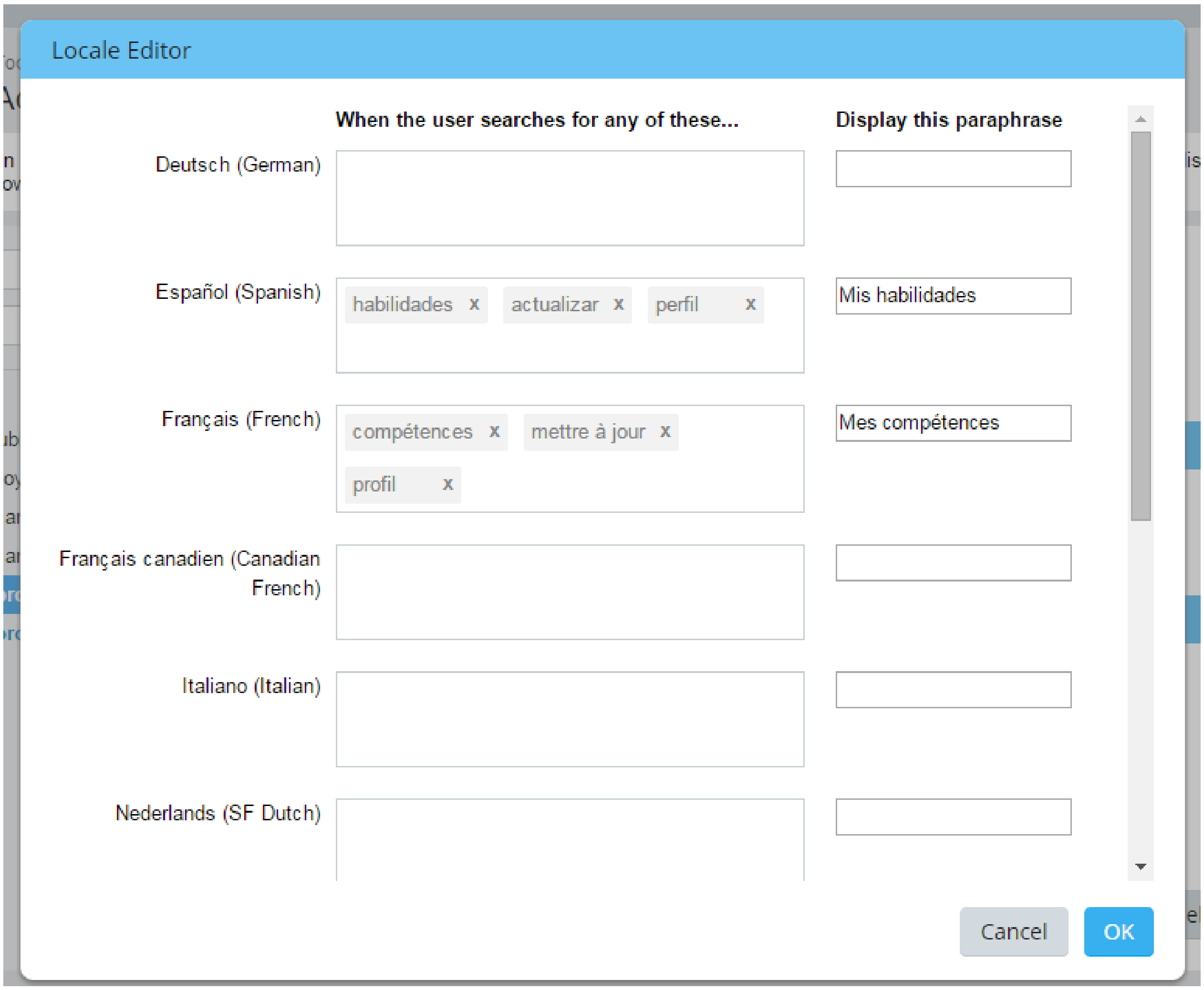
Standard Paraphrases

For standard paraphrases, you can only view the existing translations, which are delivered and maintained as part of your language packs. The following example shows translations of the paraphrase *View succession org chart*.



Custom Paraphrases

For custom paraphrases, you can use the local editor to provide translations of custom search terms or custom display labels. The following example shows some translations of the custom paraphrase *Update my skills*:



Custom Actions

You can localize the search terms and display labels in all paraphrases of a custom action in *Manage Action Search*, in the same way as any other custom paraphrase.

2.10.1 Localizing a Custom Paraphrase with the Locale Editor

Prerequisites

- *Manage Action Search* permission

Procedure

1. Go to *Manage Action Search* and find the custom paraphrase you want to localize.
2. Click the "globe" icon in the *Languages* column to open the local editor.
3. Use the locale editor to add translations of custom display labels and custom search terms.

2.11 Ability to Disable Main Navigation Menu

The option to disable the main navigation menu in the global page header enables you to adopt action search as the primary means of navigating the user interface and makes the SAP SuccessFactors user experience more consistent with other SAP applications.

The main navigation menu is present on most pages in the HCM suite and can be used to navigate to the different pages. If you disable this menu, you need to ensure that your users have other ways to navigate the system. The primary alternative to the main navigation menu is the action search feature, but you can also configure other means of navigations, such as home page tiles, deep links, custom navigation links, and supplemental to-dos.

Disabling the Main Navigation Menu [page 87]
Disable the main navigation menu in the global page header if you want to promote the use of search and home page as the primary means of navigation.

2.11.1 Disabling the Main Navigation Menu

Disable the main navigation menu in the global page header if you want to promote the use of search and home page as the primary means of navigation.

Prerequisites

- Ensure that action search is enabled.

- Ensure that custom navigation links that have been added to the main navigation menu can also be accessed by other means, such as action search or home page.

Context

> ⚠ Caution
>
> If you disable the main navigation menu, users must be provided with other methods for navigating the system, such as action search. Before you disable it, verify that other means of navigation are configured and working as expected.

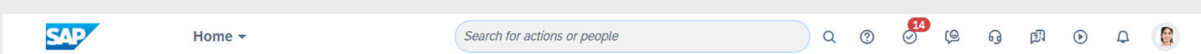
Procedure

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

Results

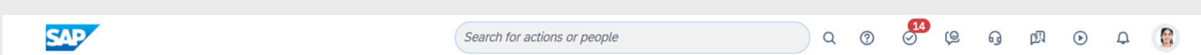
The main navigation disappears immediately from view, for all users.

> Example
>
> By default, both the main navigation menu and action search are shown in the global page header. Here's an example of the header on the *Performance* page.



Global page header with main navigation menu

> If the main navigation menu is disabled, action search is the primary means of navigation and there's no indication of the current page in the global page header. Here's an example.



Global page header without main navigation menu

Task overview: Ability to Disable Main Navigation Menu [page 87]

2.12 Deactivating Action Search

The administrator can contact implementation partner or Product Support to deactivate Action Search from Provisioning.

Context

After enabling Action Search in the Upgrade Center, you can undo this upgrade in the first 10 days. See details in Enabling Action Search [page 50]. After 10 days, you can only get it deactivated in Provisioning.

Procedure

Turn off *Company Settings* > *Enable Action Search (requires Role-based Permission and Generic Objects)* in Provisioning.

Results

Action Search is now deactivated in your instance.

3 Change History

Learn about changes to the documentation for People Search and Action Search in recent releases.

1H 2024

Type of Change	Description	More Info
Changed	We added an example to better explain the name matching logic.	Name Matching Logic in Universal People Search [page 7]
Changed	We updated this topic to remove the outdated restriction.	Prerequisites and Restrictions of People Search in the Global Header [page 13]
Changed	We updated this topic to add the last optional step to let administrators know about the usage of *User Directory* permission.	Enabling People Search [page 14]
Changed	We added a Remember note for **Division**, **Location**, and **Department**, as well as for the criterion **Username**.	Configuring Search Criteria for People Search [page 16]
Added	We added a topic to demonstrate the ranked weighting of different search criteria.	Ranked Weighting of People Search Results [page 42]
Added	We added a topic to list the typical problems when using People Search.	Troubleshooting [page 43]
Added	We added a topic to show how to return accurate employees for Japanese and Chinese queries.	Showing Accurate Employees for Japanese and Chinese Queries in People Search [page 43]
Added	We added the Action Search contents into this guide, and will deprecate its old guide map.	Action Search [page 45]
New	We added a topic to tell administrators how to allow certain employees to search actions using English in the global header search box or in the *Tools* section of Admin Center even if they log in with non-English language.	Enabling Cross-Language Lookup for Action Search [page 51]
Changed	We updated this topic to tell customers that the ranked weight of display label is higher than search terms.	Search Results Ranking [page 84]

2H 2023

Type of Change	Description	More Info
March 15, 2024		
Changed	We updated this topic to clarify that only the external users that adopt 360 Degree Multi-rater can be displayed in the global header.	Global Header People Search [page 12] Showing External Users in People Search Results [page 40]
October 20, 2023		
Changed	We have moved the Change History to the end of the guide.	What Is People Search? [page 4]
Changed	We added a note to clarify that fuzzy search does not support Chinese, Japanese, and Korean.	Enabling Fuzzy Search in People Search [page 16]

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Example Code

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