



PUBLIC

SAP SuccessFactors Learning: Sustainable System Design

RIZING

pentos

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THE BEST RUN 

GroupeX
SOLUTIONS

Stepping  Cloud

Cognizant

Document Details

| Name | Objective | Audience |
|--|--|---|
| SAP SuccessFactors Learning: Sustainable System Design | Provides guidance on how to set up the learning management configuration effectively and sustainably to avoid unnecessary rework, issues, and extensive maintenance. | SAP SuccessFactors Customers: IT and HR SAP SuccessFactors Implementation Partners: Consultants, solution architects, and project managers |

Change Log

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|---------|------------|--------------------|
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| Product | Release - From | Release-Valid till |
|-----------------------------|----------------|--------------------|
| SAP SuccessFactors Learning | 2H 2020 | |

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Implementation Design Principle (IDP) are documents that complement existing implementation handbooks by addressing real-life implementation challenges as well as frequently asked questions. They are best practices verified by the SAP SuccessFactors product in collaboration with our experienced implementation partners and SAP services. IDPs will give structured guidance to address challenges via product configuration and/or provide workarounds to avoid typical implementation pitfalls. Some of the guidance especially technical solutions may require custom development which may require partner support.

The recommendations in this document are based on the features and functionality available up to SuccessFactors release at the time of writing. Future functionality can impact the recommendations provided by this document. We strive to keep these recommendations up-to-date, however, in case you find that a recent functionality has not yet been considered in the latest version of this document, please send an email to SAPSuccessFactorsIDPDoc@sap.com. In addition, the reader is advised to read and familiarize with essential and additional product-related documentation which includes Implementation Guides, SAP Notes, SAP Knowledge Base Articles, and additional assets as referenced in this document, see chapter 7.

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1 TERMINOLOGY

The following table explains some abbreviations used in this document.

| Abbreviation | Description |
|---------------|---|
| Class | A class is a scheduled instance of an instructor-led course that is conducted at a time, place, and with resources such as instructors. (The previous term was 'scheduled offering'.) |
| Agenda | Times, locations, and resources are linked to time slots defined within a class. |
| UI | User Interface |
| SF LMS | SuccessFactors Learning Management System |
| AICC | Aviation Industry Computer-Based Training Committee – an eLearning standard |
| SCORM | Sharable Content Object Reference Model – an eLearning standard |
| OCN | Open Content Network – a group of third-party learning content vendors, with standard configuration, included in SuccessFactors Learning |
| APM | Automatic Process Module |

2 ABSTRACT

A learning system that is sustainable and effective must meet the customer's business needs to their satisfaction, without generating complex maintenance for the customer post the go-live. This document shows how to set up the learning management configuration effectively and sustainably, avoiding rework, issues, and high-effort maintenance.

3 INTRODUCTION

The key to creating a manageable and sustainable learning environment is to make optimal use of certain features and components. Following are the common learning components and features that are explained in this document and their best practices for implementation:

- Assignment profiles
- How to build the home page to enhance the user experience
- Using Time Slots
- Features to enable during go-live
- Managing content on the content server
- User integration imports
- Using PERSON_GUID and PERSON_ID_EXTERNAL during imports
- Importing learning history

4 BUSINESS REQUIREMENT

This document explains the key learning system features, best practices, recommendations, and solutions that are crucial to implementing and maintaining a successful SuccessFactors Learning Management System (LMS).

5 DETAILED SOLUTION

5.1 Assignment Profiles

The Assignment Profile is a powerful administrator tool for automating training assignments to employees who share common training needs. Before creating an Assignment Profile, consider these questions:

- Should the training be available for a user to register or consume as a self-service through the library?
- Is the training a requirement for a specific target group?
- What can you do to ensure you are assigning the right training to the right people?

A system that answers all those questions can be a lot to implement and, without following best practices, may result in an overly complex setup. As the system matures, it leads to complexity in setup and maintenance of Assignment Profiles, typically done by LMS Administrators.

To avoid this problem, a general guideline is to grant permissions to add and edit the Assignment Profiles to Learning Administrators who are more experienced. The Assignment Profile is a dynamic and powerful tool, and any changes made to a profile can affect many users. As a best practice, Administrators should test and verify large and more complex Assignment Profiles within the preview LMS instance before making the setup production-ready. This must be done manually, because currently there is no automated process to safely copy assignment profile settings from one instance to another. Note that, if global notifications are enabled in the preview instance, and the learning plan and learning expiration APM's are scheduled, then direct assignments to the Learning Plan will trigger notifications to users and managers.

5.1.1 Assignment Profile Administration

This section focuses on key recommendations on how to create and maintain assignment profiles.

5.1.1.1 Assignment Profile Set Up

Naming Convention

A simple but consistent naming convention that includes meaningful attributes allows Administrators to better organize and manage the Assignment Profile records. A recommendation for a naming convention is to include a prefix that indicates the audience.

Here are some examples:

| Assignment Profile ID | Description | Rule |
|-----------------------|---|---|
| AP_ALLMGRS_DE | Assigns the core library and individual item assignments to all Managers in Germany | <i>Security domain = GERMANY</i> 1. User is a Managers equals Yes |
| AP_ALLNH_DE_2020 | Assigns the 2020 New Hire Orientation program to all 2020 new hires in Germany. | <i>Security domain = GERMANY</i> 1. User ID is not empty 2. Hire Date must be a date between Jan/1/20 – Dec/31/20 |

To ensure Assignment Profiles are created in a sustainable manner, and to make administration more manageable, Administrators can use a single Assignment Profile to assign different types of entities (for example, libraries, items, and programs), based on the training needs of the target group. In some organizations, you may need to create a more granular structure. For example, you can create an Assignment Profile that assigns a global library to all users and a separate Assignment Profile that assigns a single entity (for example, compliance curriculum) to all users. The separate Assignment Profile makes it easier to administrate Assignment Profiles because Administrators can clearly distinguish which entities are being assigned by a particular Assignment Profile. However, as the LMS matures, be aware that granular structures will result in higher administrative efforts.

In summary, it is recommended to follow these practices:

- Use a single Assignment Profile for Global learning assignments.
- Use separate Assignment Profiles only when specific or non-global learning assignments are necessary.

Administrators should also maintain a description in the Assignment Profile record to inform other Administrators about the purpose of the Assignment Profile. This will help prevent other Administrators from adding users or changing other attributes that must not be changed.

Assignment Profile Attributes

This list of available user attributes depends on the data that is imported to LMS. The fields are defined during the implementation project, together with the Implementation Partner. When creating an Assignment Profile, there are several options to build a set of rules to capture the correct target users. Before running the new Assignment Profile, Administrators can preview and download a list of all users that match the rule(s) and who are included in the assignment. As a secondary check, Administrators can run a search from the People > User menu and filter according to any of the user data attribute to compare with the downloaded list. It is recommended to always preview the Assignment Profile population before running any changes, to ensure the correct audience is set and no incorrect assignments and notifications are triggered.

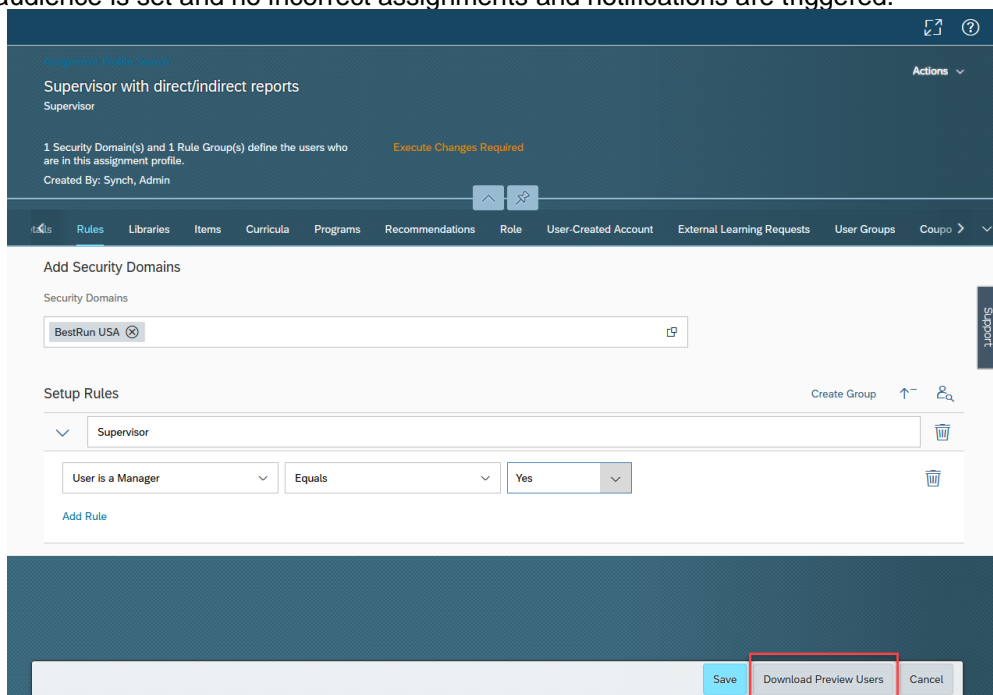


Image 1: Assignment Profile sample from demo instance, showing the 'Download Preview Users' options

The complexity of the Assignment Profile setup can vary depending on the organization and the training requirements. Multiple rules can be added and grouped together as and/or in combinations as shown in the following example. However, to reduce complexity, it is recommended to keep the number of rules to a minimum.

Supervisor with direct/indirect reports

Supervisor

Assignment Details Rules Libraries Items Curricula Programs Recommendations Role User-Created Account External Learning Requests User >

Security Domains

BestRun USA

Setup Rules

Create Group

Supervisors from Germany

User is a Manager Equals Yes

Country Matches DE

Add Rule

Supervisors from Leadership Team Germany

User is a Manager Equals Yes

Organization ID Matches Leadership Team Germany (50140000)

Add Rule

Save Download Preview Users Cancel

Image 2: Assignment Profile sample from demo instance, showing the and/or conditions

A good starting point is to examine the training needs across the organization to avoid creating Assignment Profiles with a narrow scope, or use „exclude“ parameters instead of listing out all possible values for a “matches” or “equals” parameter.

One of the most straightforward Assignment Profiles to create is with the rule “User ID is not empty”. This rule targets all users from the security domain defined in the assignment profile.

Assignment Profile Search

For All Employees - Core Catalogs, Recommendations and Individual Item Assignments
EMP

5 Security Domain(s) and 1 Rule Group(s) define the users who are in this assignment profile.
Created By: LMS, Admin

Execute Changes Required

Assignment Details Rules Libraries Items Curricula Programs Recommendations Role User-Created Account External Learning Requests User G >

Add Security Domains

Security Domains

BestRun SB - 10000 External Site Domain Default Public Access Domain 2 More

Setup Rules

Create Group

All Users

User ID Is Not Empty

Add Rule

Save Download Preview Users Cancel

Image 3: Assignment Profile sample from demo instance, showing how to select all users

| Security Domain ID | Organization ID | Job Code ID | Alternate Job Code ID |
|--------------------|-----------------|-------------------|-----------------------|
| Address | City | State | Postal Code |
| Country/Region | Job Location ID | User is a Manager | Employee Type ID |
| Employee Status ID | Is Full-Time | Regular/Temporary | Hire Date |
| Hire Month | Item Completion | User ID | Manager ID |

User Custom Columns

Note: With the use of Custom Fields within Assignment Profiles, the fields can be created/maintained as a referenced or non-referenced field. A referenced field displays a list of allowed values in a dropdown menu from which Administrators select the appropriate value. This avoids mistakes and minimizes the risk that users are excluded from the Assignment Profile due to data quality. Non-referenced fields force the Administrator to enter the value using the keyword search. This could result in discrepancies in the resulting number of users. For these reasons, it is strongly recommended to use referenced user custom fields instead of non-referenced user custom fields.

Curricula Assignment based on Function

Function

1 Security Domain(s) and 1 Rule Group(s) define the users who are in this assignment profile.
Created By: Sing, Aanya

Execute Changes Required

Assignment Details Rules Libraries Items Curricula Programs Recommendations Role User-Created Account External Learning Requests User G >

Add Security Domains

Security Domains

BestRun USA

Setup Rules

Supply Chain Function

Function Matches

Add Rule

When non referenced field, there is no option to open a drop down menu

Curricula Assignment based on Function

Function

1 Security Domain(s) and 1 Rule Group(s) define the users who are in this assignment profile.
Created By: Sing, Aanya

Execute Changes Required

Assignment Details Rules Libraries Items Curricula Programs Recommendations Role User-Created Account External Learning Requests User G >

Add Security Domains

Security Domains

BestRun USA

Setup Rules

Supply Chain Function

Function Matches

Add Rule

When the field is referenced, there is an option to open a drop down menu

Image 4: Assignment Profile samples from demo instance, showing how referenced and non-reference custom fields appears in the Assignment Profile

The Assignment Profile Execute Updates APM job runs according to the schedule set by the organization to check for changes to the user attributes, and assign learning entities (item, curricula, and program) accordingly. For example, if the Assignment Profile rule is “Job Code ID matches Sales,” the APM will find users with the Job Code matching “Sales” and add these users to the Assignment Profile. If the User’s Job Code changes to “Operations”, the APM will remove any user assignments made by the Assignment Profile.

5.1.2 Assignment Profile Maintenance

Assignment Profiles should be reviewed and maintained regularly by the Administrators to ensure content is current and relevant to users. If regular review and maintenance isn’t possible, make Assignment Profiles inactive to help support correct usage (unassignment of learning content) within the LMS. Administrators can decide whether to deactivate the Assignment Profile to keep any existing assignment in place and prevent future assignments, or to deactivate and unassign training from the pool of users.

Always run the Assignment Profile Execute Updates job during periods of low system usage, such as in the evening or night, or at the lowest user login period for a global customer. Do not overlap the assignment profile synchronization with connector runs, because this can cause delays in users having access to training courses, libraries, and curricula. If the SuccessFactors User Connector is scheduled to run daily, make sure to schedule the APM after the connector runs so that the job can run the latest changes.

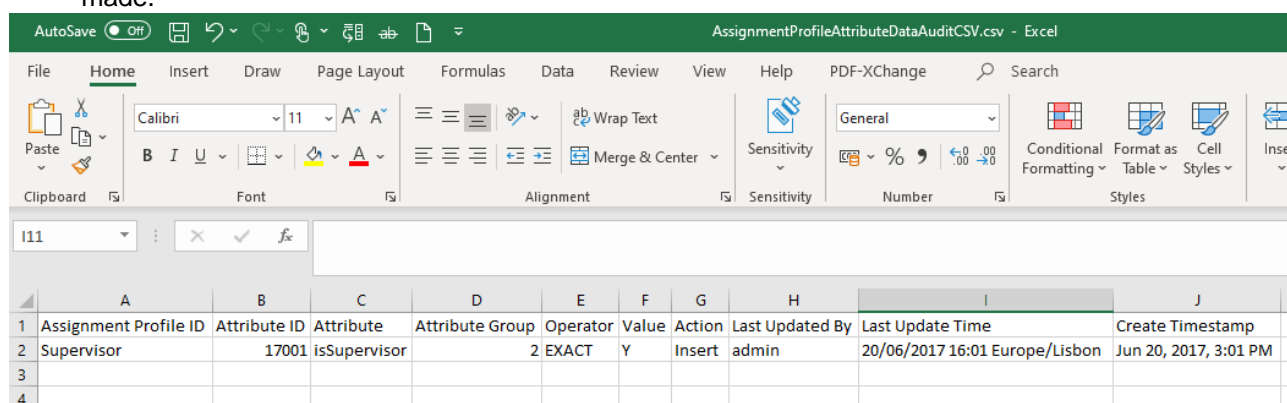
Assignment Profiles can be accessed by going to **Manage User Learning -> Assignment Profiles**.

For best practices on how to use assignment profiles, see the following Knowledge Based Article (KBA): [2781830 - Assignment Profiles Best Practices - Learning Administration](#).

5.1.3 Assignment Profiles Related Reports

Standard Reports

- Assignment Profile Attribute Data Audit – The Assignment Profile Attribute Data Audit Report shows a history of attribute changes for a selected assignment profile. The Learning Administrator can filter for added, modified, deleted, or updated records, and see who last made the change and when they were made.



| | A | B | C | D | E | F | G | H | I | J |
|---|-----------------------|--------------|--------------|-----------------|----------|--------|--------|-----------------|--------------------------------|-----------------------|
| 1 | Assignment Profile ID | Attribute ID | Attribute | Attribute Group | Operator | Value | Action | Last Updated By | Last Update Time | Create Timestamp |
| 2 | Supervisor | 17001 | isSupervisor | 2 EXACT | Y | Insert | admin | | 20/06/2017 16:01 Europe/Lisbon | Jun 20, 2017, 3:01 PM |
| 3 | | | | | | | | | | |
| 4 | | | | | | | | | | |

Image 5: Sample of the Assignment Profile Attribute Data Audit report

- Assignment Profile Related Data Audit – The Assignment Profile Related Data Audit report, shows a history of entity record changes (for example, item, curricula, and program) for a selected assignment profile. The Learning Administrator can filter for added, modified, deleted, or updated records, and see who last made the changes and when they were made.

| | A | B | C | D | E | F | G | H | I | J |
|---|-------------|-----------------------|-----------------------|--------|--------|-----------------|--------------------------------|-----------------------|---|---|
| 1 | Entity Type | Entity ID | Assignment Profile ID | Status | Action | Last Updated By | Last Update Time | Create Timestamp | | |
| 2 | Curriculum | LD-01 | Supervisor | A | Insert | admin | 14/11/2018 06:48 Europe/Lisbon | Nov 14, 2018, 6:48 AM | | |
| 3 | Curriculum | LD-01 | Supervisor | V | Modify | admin | 14/11/2018 08:13 Europe/Lisbon | Nov 14, 2018, 8:13 AM | | |
| 4 | ITEM | RS-2:BRIEF:02/01/2017 | Supervisor | A | Insert | PLATEAU | 10/09/2020 14:32 Europe/Lisbon | Sep 10, 2020, 1:32 PM | | |
| 5 | | | | | | | | | | |
| 6 | | | | | | | | | | |
| 7 | | | | | | | | | | |

Image 6: Sample of the Assignment Profile Related Data Audit report

The reporting functionality can be accessed by going to **Home -> Reports**

Custom Reports

If the standard reports don't provide all the necessary information, you can find related custom reports in the [Learning Custom Report Exchange Forum](#) in the Customer Community.

5.2 How to build the Home Page to Enhance the User Experience

We all understand how important first impressions are in business. The same is true for the first impression a learning system makes on end-users. The learning landing page provides that first impression to the end-user, and the impression needs to be as engaging to them as possible. This home page of the learning system represents the learning culture of the organization. Also, a strong first-impression can go a long way towards bringing users back to the LMS. The learning landing page can be customized to the organization's branding to remain familiar and friendly to users.

Creating a demo of different types of Learning Landing Pages:

During the early phase/iteration of the project of the configuration workshop is important so that the client understands what level of configuration is possible for the learning landing page.

To access the learning landing page configuration console, go to **System Administration -> Application Administration -> Landing Page Settings**.

The functionalities available from this console are as follows:

- Choosing a tile to display on the learning landing page
 - Control the visibility of custom tiles for a specific set of users.
- Size of the tiles
 - Both custom and standard
- The order in which the tiles are displayed
 - The screen is generated from left-to-right and downward, as the allowable width of the screen is reached by the default tile placement per row.
- Lock or free tiles
 - You can lock the tiles or make them free-floating to allow users to design their learning landing page on their own. However, a general recommendation would be to not let end users be in control of managing their tiles, because that situation can get unwieldy and difficult to support.
- Resolution of the Learning Landing Page

- The ideal resolution of the landing page is 1366 pixels.

The SuccessFactors LMS is a tile-based platform that provides standard tiles for the important functionalities, along with the option to create custom tiles.

5.2.1 Use of Standard Tiles and their Functionalities

- **MyLearningAssignments:**
This tile contains all the learning items, programs, curricula, and surveys assigned to the user, whether they are self-assigned, auto-assigned, manager assigned, or admin assigned. The title displays the assignment type, due date, and description. It also contains the link to the action that needs to be performed against the item, such as to start a course, register, and/or request approval.
- **Find Learning**
This helps the user search and find available training, and it provides a Catalog Search Type Ahead functionality that completes the word typed in the search bar. The functionality is disabled by default. To enable it, choose **System Administration -> Configuration -> System configuration -> Configuration ID: Library -> enableCatalogSearchTypeAhead=true**

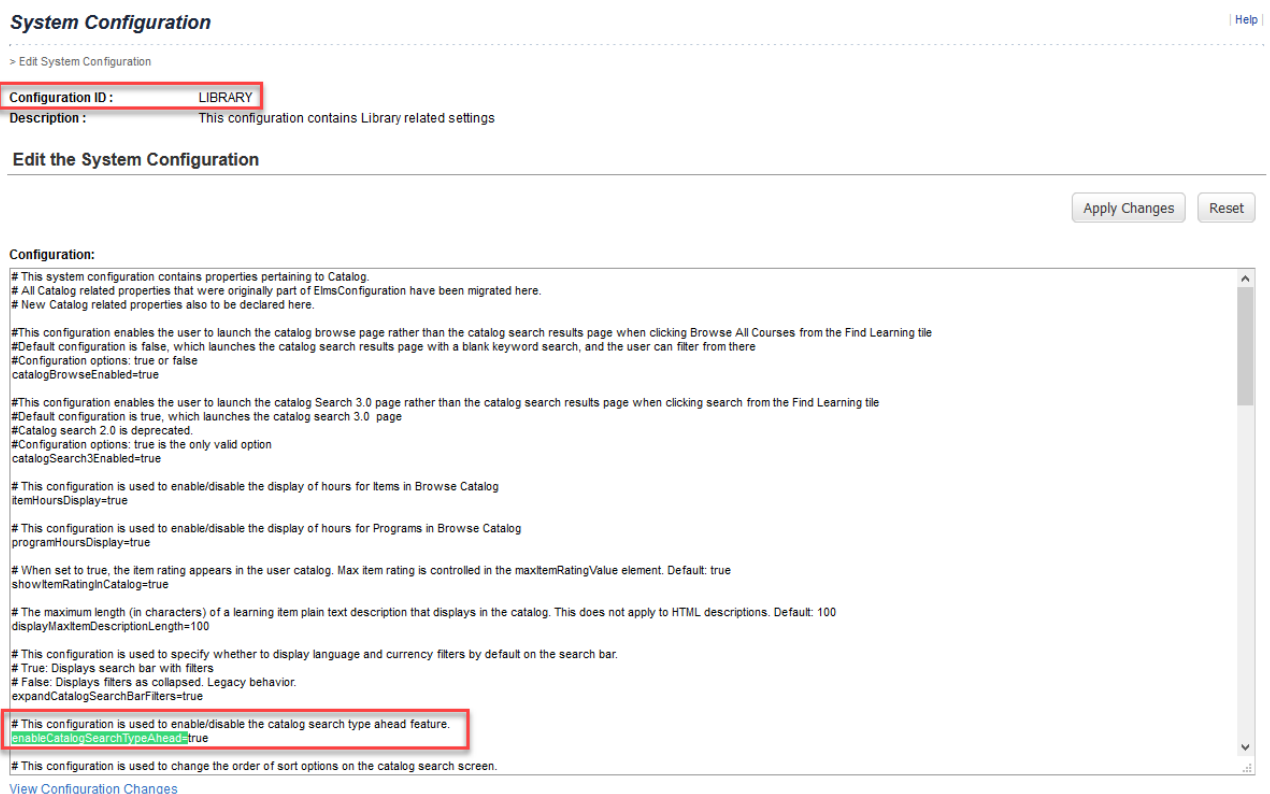


Image 7: Sample of enableCatalogSearchTypeAhead=true setting in the Library file.

- **LearningHistory**
This tile provides the details of the training completed by the user in the last 30 days. The user can view all trainings completed over the period and can print certificates that would have been formatted based on the organization's branding.
- **MyCurricula**
This tile reflects user status for all curricula assigned (for example, whether curricula completion is overdue, due in 30 days, due later, and so on). Curricula construct is widely used by organizations for compliance training.
- **MyTeam**
Provides a visual overview, based on a manager's direct reports, of the status of the learning done

(for example, learnings due in 7 days, ones overdue, and so on). Choosing this tile redirects the manager to the My Team page. This tile is visible only to users who are managers in the system.

- **Links**
Lists various links to other areas in the LMS, as applicable (for example, to My quick guides, Collections, Achievement, links to Approvals, Dashboard, Easy Links, Options & Settings, and so on). You can add external website links too, for easy access.
- **AvailableClasses**
Provides a shortlist of upcoming classes for courses on the user's learning plan. It's a quick visual representation of potential classes that may interest the user, to save users time searching for them.
- **Recommendations**
Lists training recommended to the user either by an Administrator (using an Assignment Profile) or even by another peer in the organization. This tile can be leveraged for displaying training you want to show to the user without assigning it. To enable the tile, choose **System Admin -> Configuration -> System configuration -> Configuration ID: LMS_ADMIN -> enableItemRecommendations=true**
- **Featured**
Promotes specific training, whether it is a flagship item (featured), a revised version of an earlier training, or a new training in the organization.
- **Bookmarks**
Contains the bookmarks for the collections and quick guides marked by the user for future consumption.
- **Self-Assigned**
Displays the training the user has self-enrolled in.
Note: If this tile is enabled, the self-enrolled training will not be visible in the My Learning Assignment tile.

5.2.2 Custom Tiles

Custom Tiles are useful to customers who need to accommodate several pieces of information that are outside of the standard learning Items within the LMS. Also, a Custom Tile is a great way to separate any information that needs to be made available to only a certain group of people. You can restrict the view based on User Groups and Organization, and can make the tile's visibility time-bound if needed.

Custom Tiles can be used for the following purposes:

- **Branding**
You can have a tile use a large image as a banner for the page. You can animate the banner or do other customizations on that tile through HTML, given the need and expertise available.
- **Directed Search**
- **External Links**
Such as to TED talks, or to a company's other networks.

Create and demo a simple Custom Tile with an external link and with Images (possibly hyperlinked). The following KBAs provides information on how to create and use Custom Tiles:

[2369631 - How to add Custom Tile with image and link](#)

[2596546 - Custom Tiles | How to assign them to a restricted group of people?](#)

5.2.3 Branding

The overall branding style for LMS is controlled through the Platform Branding (Theme).

Admin Center->Theme Manager <https://apps.support.sap.com/sap/support/knowledge/en/2369631>

5.2.4 Categories (Subject Areas)

Categories are a vital part of making sure that learning courses are organized and grouped in such a way that users find them easy to view and search for.

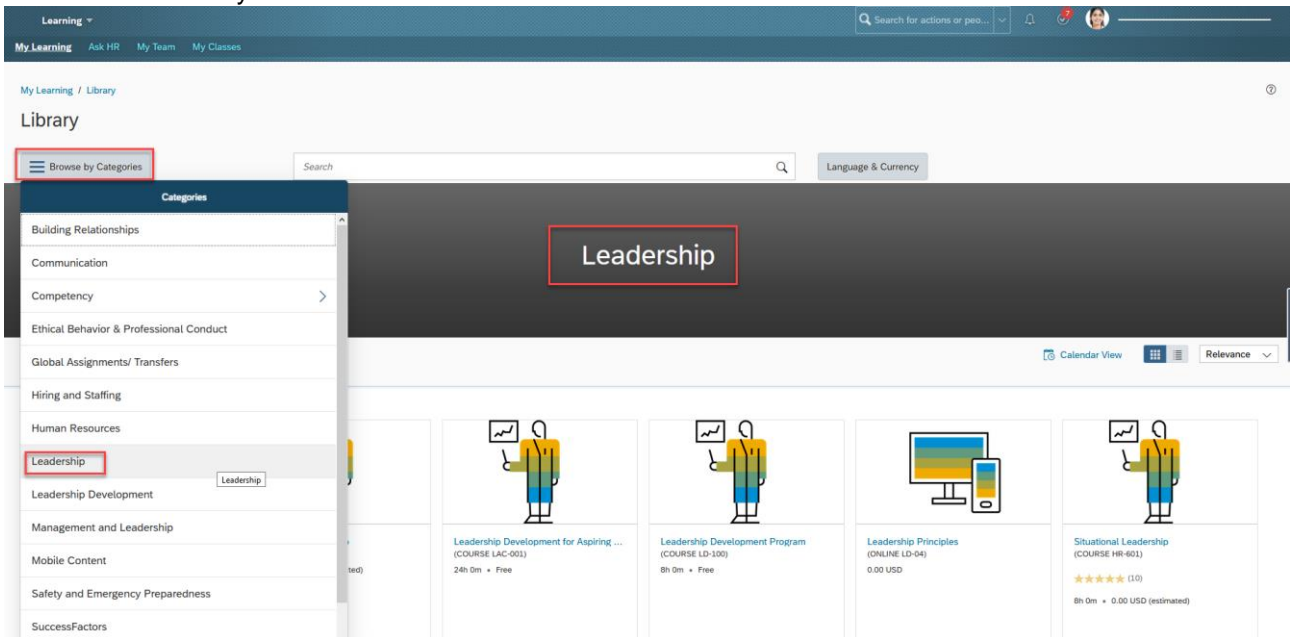


Image 8: Sample of Library categories (image from demo).

Provide examples of different kinds of Categories to the client through the Configuration Workbook. Use the following to help users understand how the Categories can be updated for each course:

- Item records
- Item Connectors

The Categories can also be arranged in a familiar tree-level structure, allowing users to easily navigate to courses located in different Categories.

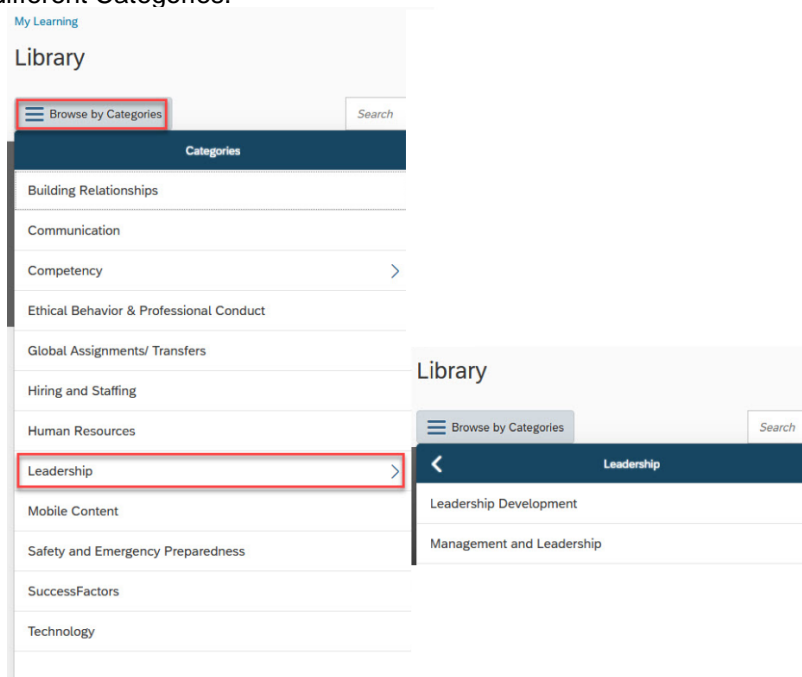


Image 9: Sample of tree-level structure category (image from demo).

To enhance user experience, all or most of the Categories created should be labeled.

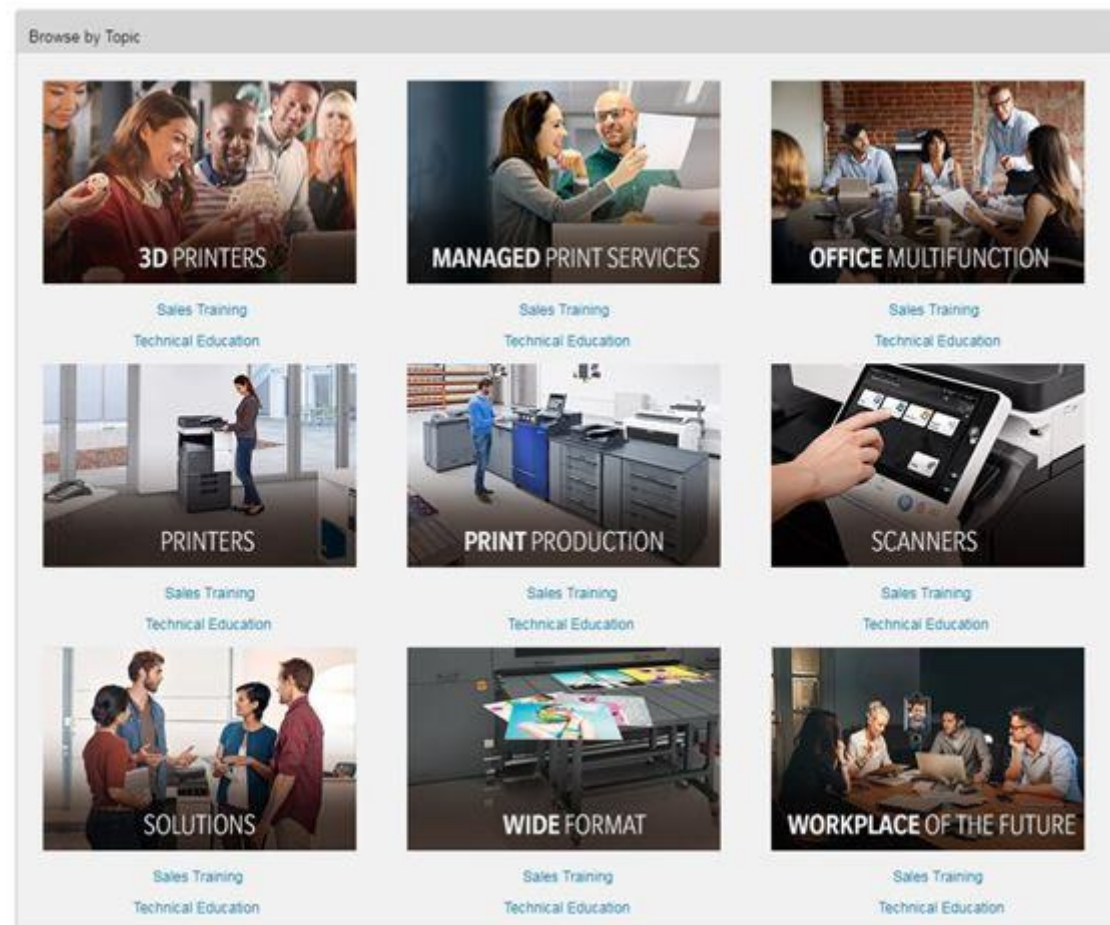


Image 10: Example of Categories configured in the demo instance

5.2.5 Direct Link

This is a feature you'll want the Customer to be made aware of. A Direct Link can take users to specific pages in SAP SuccessFactors Learning. Companies that have a strong learning culture and want to push segmented learning to its users will benefit from using Direct Link. Several Direct Link types can be used by the client for any directed search through Custom Tiles.

Direct Link can be used for library-directed Search, using the options of Category or Item Classification:

- ILT (Instructor Led Training)
 - Online
 - Other
 - Curricula
 - Program
- Collection



Image 11: Example of Categories using Direct Links to curriculum, online courses, and more.

The direct link can be generated on the Learning Admin Page by choosing **System Administration > System Management Tools > Generate Direct Link**

5.2.6 News Page

Through the Learning News Page, customers can broadcast and promote information related to their Learning Platform to all users and/or to a restricted specific set of users. On the News page, a customer can do the following:

- Broadcast Global courses (Monthly/Quarterly/Yearly) and promote specific ones.
- Promote learning events/seminars.
- Broadcast links to external learning videos (for example, to YouTube, TED talks, or to a company's web portals, and so on).
- Broadcast messages from Management regarding learning initiatives.

The News Page is set to 'User Discretion' by default, which is the recommended setting. Users can select what information they would like to appear on this page. The Learning News Page can be designed using HTML and can also use web-accessible content. Choose **System Administration > Application Administration > User Introductions > DEFAULT LEARNER INTRO**.

For more information, see the following KBAs:
KBA: 2398524 - Adding Video to the News Page

KBA: 2398563 - How to Edit News Page (User Side)

5.3 How to use Time Slots

Classes can be divided into a time slot for resource planning. Times, locations, and resources are linked to the time slots defined. You could have multiple time slots: for example, if the course is scheduled over three days, each day will be a time slot. A day can also be divided into multiple time slots, with breaks in between.

Overview to Effective Business Communication

19999

| | | | |
|--|---|----------------|---|
| Start Date: 18/01/2021 13:00 | Instructor: Mya Cooper | Enrolled: 0 | Status: Active |
| End Date: 20/01/2021 22:00 | Location: Amsterdam Classroom 01 (CLASS-AMS-01) | Waitlisted: 0 | |
| Time Zone: Western European Time (Europe/Lisbon) | Facility: Amsterdam Office (AMS) | Open Seats: 20 | |

[Course ID: 123 \(New\) | - 20192014-16-000](#)

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[Special Requests](#)
[Libraries](#)
[Contacts](#)
[Materials](#)
[Document Links](#)
[Registration Financial Details](#)
[Cost Calculation](#)
[Cost Summary](#)
[Pricing](#)

Agenda

| <input type="checkbox"/> | Title | Primary Location | Primary Instructor | Time Slot Description | Conflict Item | Virtual | |
|-------------------------------------|------------------|------------------------|--------------------|---|---------------|---------|-----|
| <input type="checkbox"/> | ▼ Mon 18/01/2021 | | | | | | |
| <input checked="" type="checkbox"/> | 13:00 - 17:00 | Amsterdam Classroom 01 | Mya Cooper | Business Communication Simulation, Part I | | | ... |
| <input type="checkbox"/> | 18:00 - 22:00 | Amsterdam Classroom 01 | Mya Cooper | Business Communication Simulation, Part I | | | ... |
| <input type="checkbox"/> | ▼ Tue 19/01/2021 | | | | | | |
| <input type="checkbox"/> | 13:00 - 17:00 | Amsterdam Classroom 01 | Mya Cooper | Business Communication Simulation, Part I | | | ... |
| <input type="checkbox"/> | 18:00 - 22:00 | Amsterdam Classroom 01 | Mya Cooper | Business Communication Simulation, Part I | | | ... |
| <input type="checkbox"/> | ▼ Wed 20/01/2021 | | | | | | |
| <input type="checkbox"/> | 13:00 - 17:00 | Amsterdam Classroom 01 | Mya Cooper | Business Communication Simulation, Part I | | | ... |
| <input type="checkbox"/> | 18:00 - 22:00 | Amsterdam Classroom 01 | Mya Cooper | Business Communication Simulation, Part I | | | ... |

Image 12: Example of Time Slots (image from demo).

This section explains the implications for the user and administrator when too many time slots for classes are created. We provide a recommendation on how to keep time slots usage simple and useful.

5.3.1 Creating Multiple Time Slots for Classes

When creating multiple time slots for classes, be aware of the problems they can cause around receiving email notifications and recording attendance:

Email notifications

A notification will behave as follows when a class has multiple time slots:

- The notification will have a long list of all the time slots, without descriptions. There is currently no syntax tag available to show the description of the time slot.
- The recipients (User/ Manager/ Primary Instructor/ Other) will receive an invite to each time slot, and this may become overwhelming to them.

Recording attendance

The instructor will have to record attendance for each time slot. There is currently no standard way to report on this attendance captured - a custom report will have to be developed for this purpose.

Keeping time slots simple and useful

Based on the implications/limitations of creating multiple time slots, the recommendation is to keep the number of time slots for a class to a minimum, and use them only in the following scenarios:

- An online exam needs to be taken during a classroom session and the exam can be made available only during a specific time slot.
- The class needs to move to a different venue.
- A class needs to be presented over many weeks. For example, a language class.
- A change of instructor is required.

5.4 Go-Live Features Recommendation

The LMS environment is constantly innovating and new functionality is added to SuccessFactors updates every six months. Although this is exciting for seasoned users, the many possibilities can be overwhelming to new customers.

Your LMS can grow even after go-live. You need to prioritize what components or features to activate for the go-live. If no meaningful content or strategy for a specific feature is available at go-live, consider implementing the feature at a later stage.

This section considers the functionalities that new customers might want to implement later in their roadmap. Planning the post-implementation steps for the learning roadmap helps customers direct the attention of the business onto the LMS after implementation, and it prepares administrators for supporting the marketing efforts involved with each functionality that's added. If possible, it's better to create a roadmap for future activation of learning features during the design phase. Be sure to involve the change management team to ensure meaningful communication about the new features to the business.

The following features can be considered for later activation:

5.4.1 Marking Items as Featured or New in a Library

To have an item appear on the user's Featured tile, Administrators need to mark items as features in a specific library. Administrators will often not be ready for this level of detail initially and can remove the Featured tile from the user Home Page until ready to use it.

For best practices on how to use libraries, see the following KBA: [2784345 - Course Catalog Best Practices - Learning Administration](#)

5.4.2 Accomplishments

Learning Accomplishments is a tool in which users can set target learning goals against topics that interest them and track their training over time against those goals.

Until you know what to do with the data collected from Learning Accomplishments, this tool can be considered for later activation. When ready to be used with a proper communication strategy, Learning Accomplishments can focus the attention of the users on the LMS to foster greater user engagement.

5.4.3 User-Created Content (Collections and Quick Guides)

These features can also be considered for later activation, once users are comfortable with the system, and the need for user-created content arises.

Also, customers are often concerned that there isn't an approval workflow within the Quick Guides and Collections features for user-created content though businesses want to curate user-generated content and they want it to be high-quality.

The following are recommendations for how to best manage user-created content without an approval process. For more information, see KBA [2784084](#). The recommendations in the KBA address collections, but the same principles apply to quick guides.

5.4.3.1 Create a New User Role

Create a new user role and add permissions to create a collection and quick guides. The business will then determine who should receive the role. This will ensure that only an approved group of users can create content.

5.4.3.2 Create a User Content Library

You might also want to restrict who can see the content created by users. To limit access, you can enable a single library to receive user-generated content, and then assign that library to users who you want to receive the content. You can also use reports, custom or standard, to monitor the popularity of content in the library.

5.5 <https://launchpad.support.sap.com/https://help.sap.com/viewer/5fae31b1299d4033b665edabea7b9087/latest/en-US/f624b39dca114c59b3d2424cd062467b.html?q=RecommendationsContent> Management Factors

When it comes to obtaining learning content, there are two primary options – build or buy.

When building content, customers will need to determine which of the following eLearning standards to use:

- Aviation Industry Computer-Based Training Committee (AICC), or
- Sharable Content Object Reference Model (SCORM) eLearning standards.

These standards allow the content to communicate with SuccessFactors Learning Management System to automatically send information that can include completion, test scores, duration of interaction, bookmarking, and more. Some of the most popular tools for this type of content development are SAP Enable Now, Adobe Captivate/Presenter, and Articulate Storyline.

For content that isn't designed with these eLearning standards, SuccessFactors Learning provides a feature called the AICC Wrapper that lets customers track completion and duration for other web-friendly content (for example, PDFs, videos, and Microsoft Power Point). AICC Wrapper lets customers repurpose corporate media and content for learning. The build approach is normally used for content that is custom to the organization.

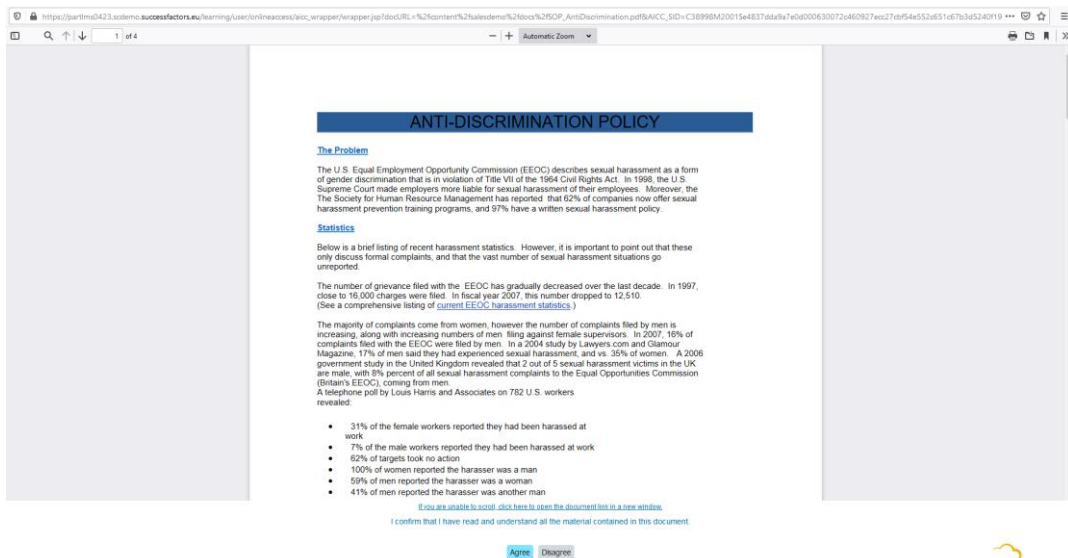


Image 13: Example of AICC Wrapper (image from demo).

5.5.1 Content Purchase Strategies

Buying content is the option used when customers require off-the-shelf content that generally applies across various types of organizations (for example, safety training, certification courses, and compliance-based training). Many 3rd party content vendors provide high-quality media and content at a lower overall cost compared to custom-developed content. SuccessFactors Learning has partnered with many of these vendors through the development of the Open Content Network (OCN). The base configuration for OCN vendors is included in a configuration file in the Learning Administration. In many cases, customers just need to know their customer site and credentials to enter it into the standard configuration, and then the content is seamlessly delivered and tracked through SuccessFactors Learning. For more information on OCN, see KBA [2419830](#).

5.5.2 Content Storage Strategies

The 25GB of content server space is set up as a Deployment Location in the Learning Administration. This is the primary method for importing content to the iContent server. Customers who have more than 25GB of content should first identify SCORM files and make them the priority for this storage space. This is based on domain restrictions inherent with the SCORM standard – essentially requiring the content to reside on the same domain as the learning management system. When this is not the case, and customers instead use their own content server, there are other solutions for dealing with the domain restriction. But using the standard storage is the simplest option. For more information on how to manage cases that involve proprietary content servers, see KBA [2407011](#).

Other file types in addition to SCORM files (AICC, PDF, PPT, video formats, and so on) can also be loaded to the content server as space allows. Customers may elect to purchase more space on this content server or consider other learning content management solutions. Each content server should be set up as a Deployment Location on the Learning Administration page. This allows customers to use the Import Content tool on the Content menu to load content to the server, create the Content Object, and optionally also to create the Item as the assignable unit for this content.

Another method for managing the content stored in iContent is to define space for testing and finalizing content. Two folders need to be created at the root of the iContent server: “Stage” and “Production.” The Stage folder is set up in the Deployment Location of the SuccessFactors Learning Stage environment. This provides the storage location for content that is uploaded through the Import Content tool in Stage for testing purposes. Once the content is fully tested, customers would then move to the Production environment, which would have the Deployment Location set to the Production folder. This environment is where the live content resides. Once the content is working as expected in Production, return to the Stage folder to remove the content. This process ensures that there is only one final version of the content and it will reduce the potential for duplicate copies using up valuable storage space.

There is a standard maximum file size configuration setting and a timeout limit of five minutes for the Content Import tool. The maximum file size can be adjusted as follows to allow for importing larger files:

System Admin>Configuration>System Configuration>Content Import>maximumFileSizeKB
 # The maximum size of a single attachment in KB. 1KB=1024 bytes
 maximumFileSizeKB=2147483

The five-minute timeout may still cause the import to fail even when this maximum file size is adjusted. In these cases, you should consider using file compression options, with tools such as Adobe Premiere or Media Encoder to reduce the file size to under 500MB. When this is not possible, use an FTP client as an interface to import large files to the content server.

Another option for file storage is to have SuccessFactors Learning customers use their corporate file servers or content that is externally available on the Internet (for example, on YouTube). Content can reside almost anywhere as long as it can be accessed from the network. For example, your customer may have some internal policy documents stored on their corporate portal. Rather than making copies of these documents to the content server (and risk them becoming outdated when the policies are revised), a Content Object can be created with the URL pointing to the original file location. Note however that if this file is stored behind a firewall, it may cause launch errors for users who are accessing SuccessFactors Learning externally. Also, it's important to safeguard these files (either through password protection or saving them as PDFs) to avoid possibly corrupting the original files.

5.5.3 Content Management Strategies

The initial process of loading content, creating the content objects and items, and content troubleshooting can be daunting within the scope of a new SuccessFactors Learning implementation. For this reason, SuccessFactors provides the Premium Content Management Services as a subscription-based offering. Even after the initial implementation project, customers can expect to have either the support or know-how for ongoing content troubleshooting and version management.

This table shows common content issues and recommended strategies:

| Issue | Recommended Strategy |
|---|--|
| Launch behavior is different based on different browsers (for example, a video in Internet Explorer prompts to be downloaded, but in Chrome it plays without needing to be downloaded). | Conduct user acceptance testing with various testers on different browsers before the item is rolled out. Make browser suggestions in the description of the course. For more information, see the HXM Suite End User System Requirements guide. |
| HTTP Error when launching the content | Check the Content URL in the Launch Method setting of the Content Object. Check for spaces or special characters that were not in the original filename. It's also good practice to use underscores in place of spaces in the filename to ensure an exact match of the link to the source. For more information, see the Internet Explorer settings to launch online content guide. |
| Issues experienced when uploading content. | See the Delivering Structured Content guide. |
| Understanding different supported versions of AICC and SCORM | Additional Info on SCORM Versions 1.2, 2004 2nd & 4th Editions & AICC here . |
| Troubleshooting AICC and SCORM content | Use the following troubleshooting guides: <ul style="list-style-type: none"> - SCORM & AICC Content Troubleshooting Guide - SCORM 1.2 AICC Troubleshooting Guide - SCORM2004 Troubleshooting Guide - How to collect JavaScript SCORM API logs |
| SCORM course sends message "completed" but the Content Object does not get marked Completed. | See KBA article 2527194 – "SCORM course sends "completed" but Content Object does not get marked Completed." |

5.6 Learning Integration Considerations

From an integration perspective, LMS is more “attached” to SuccessFactors HXM Suite than integrated with it. This means some data must be synced between the two databases. The main data element that needs to be synchronized is the employee user data that’s maintained in SuccessFactors. Other data elements can include Organization and Job information.

Traditionally, the only way to synchronize employee data between SuccessFactors and LMS was to leverage the standard employee export job from Provisioning, which was a simple UDF export. That export job could be set up only by SAP or your implementation partner and did not offer much flexibility in how the different data fields were displayed and output. It also offered minimal access for any customer wanting to update the job or the scheduling, requiring dependence on SAP or your implementation partner.

With the enhanced flexibility and features that the Integration Center has added to the SuccessFactors HXM Suite in recent releases, Using the Integration Center is now the recommended approach for all SuccessFactors to LMS data synchronization jobs. Instead of leveraging the standard employee export from Provisioning, you can now create and replicate that same job using the Integration Center tool. This offers more possibilities and fewer limitations compared to the legacy job and it allows better data integration.

If the customer has Employee Central (EC), the number of extract jobs required may be different. Here’s the summary of what you need to know:

For Employee Central customers, the following extract jobs must be created in the Integration Center:

- User Data
- Organization Data
- Job Code Data

For Non-Employee Central customers, the following extract jobs must be created in the Integration Center:

- User Data
- Job Code Data (considering HXM Suite Job Code information from Employee Profile)

The important difference between the EC and non-EC landscapes is the available entities and related tables and the amount of data to be extracted. Therefore, there are two options. These are based on your landscape, because some tables are not available in a non-EC environment. You have to first analyze your environment and the different data elements before going into the Integration Center tool to start creating the extract jobs.

Always include the following fields in any user data extract job, regardless of landscape:

- PERSON_GUID
- PERSON_ID_EXTERNAL

Those two fields are important to sync in LMS because they are key fields for the SuccessFactors HXM Suite integration. It is recommended to include those fields and map them to the LMS according to the standard mapping available in the CONNECTORS property file. We do not recommend altering the standard mapping for those fields.

The Integration Center tool lets you manipulate the fields and control the output and appearance of the data that is sent to LMS.

Integration Center allows you to do the following:

- Easily concatenate fields.
- Using only a substring of a field, create logical statements to derive information based on an existing data element.

For example, you can derive a user’s domain based on either their location or their business unit, and send the derived domain through the extract job, which does not require any transformation rules in LMS. Please refer to the IDP [SAP SuccessFactors Learning: Implementation Considerations for Efficient Security Design](#) for this use case. A second example would be to decide to take only the description from a field instead of the description and ID. In a non-EC environment, some data elements like Department, Division, and Job Codes are presented as ID and description concatenated.

For more information and details about the [jobs](#) and how to create them yourself, see the Implementation Design Principle (IDP) '[Impact of Implementing SAP SuccessFactors Employee Central](#)'. All three possible export jobs are detailed in that document.

5.7 Learning History Import Considerations

Learning History Connector and Import Data tools are used to record course completion for existing users and existing item records in the SF LMS module. The Learning History Connector is commonly used for a one-time data load for large amounts of data or on-going jobs, whereas the Import Data – Learning History tool is used for a one-time history record import of a smaller number of records.

When to use Learning History Connector or Import Data - Learning History:

Learning History Connector is a powerful import tool that you can schedule to run periodically. You provide a delimited file to SF LMS and it imports the file on a schedule. Use this tool when you import a large amount of data and when you need to schedule the import to run frequently and to process multiple batches of data.

The “Import Data – Learning History” tool is an easy tool to use. Download the Learning History template from SF LMS, fill out the template, and then upload the Learning History template to import the data. You cannot schedule, map fields, or save past uploads for troubleshooting. Sometimes it is easy to manually create history records directly in Learning Administration UI with fewer errors.

Here are some use-case scenarios and best practice recommendations:

Use Case 1:

A business wants to migrate all the active and inactive employee history records-- approximately 16 billion history records to make available across all environments in the SuccessFactors learning environment. During the discovery phase, a consultation is made with the business to understand how far they want to go back for the historical completion records, and to ask the business to consider migrating not more than 4-5 years of data into SF LMS. If the business wants to keep the older data, it can consider archiving the old data on its own server for any operational needs, and to meet legal and regulatory requirements.

Workflow Steps to Migrate the Learning History Records Using Learning History Connector:

- Step 1: Extract the user history record data to examine the history details based on the requirement.
- Step 2: Do data cleanup, manipulation, and then apply transformation logic.
- Step 3: Generate the output file in the SuccessFactors Learning History connector format.
- Step 4: Verify the manipulated data through the pre-migration testing process, to ensure data quality and quantity are correct.
- Step 5: Log in to the SF LMS SFTP path.
- Step 6: Place the connector file to process the data. For more information, see KBA article [KBA 2642344 - Learning History Connector template filename and headers](#).
- Step 7: Schedule the History Connector to fetch the data from SFTP and update it into SF LMS.
- Step 8: After the History Connector has been successfully run, view the process log by logging into SF LMS.
- Step 9: In the process log, check that all the records are successfully processed. Also, update the process log in the Data migration summary report to keep track of the migration process.
- Step 10: If any issues are found in the process log, repeat steps 3 to 8.
- Step 11: Do the post validation process for verifying the migrated data.
- Step 12: Check that user history records are created successfully in SF LMS.

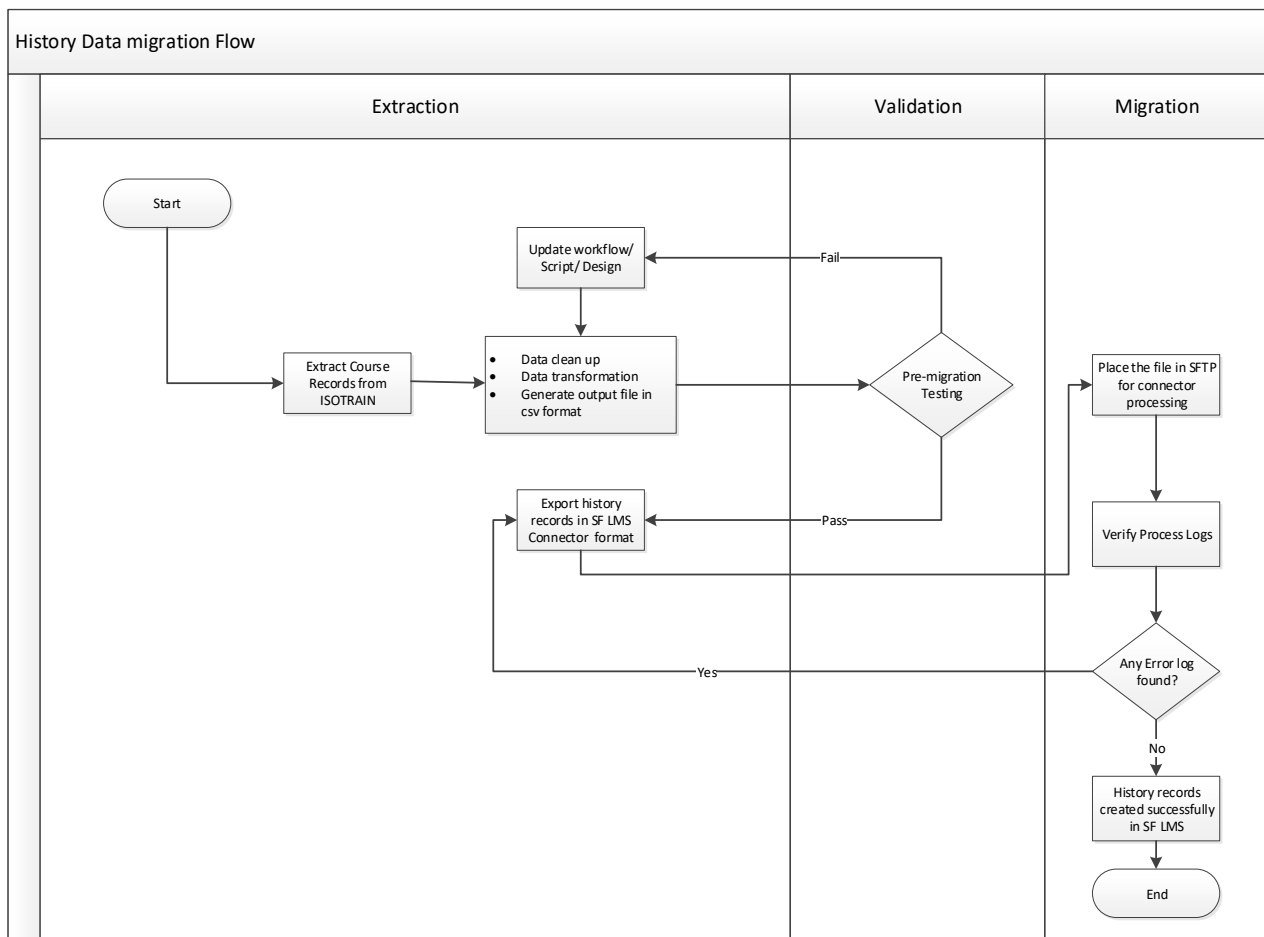


Image 14: History Data Migration Flow

The data elements must be mapped between the legacy learning system to SF LMS, before data transformation. The transformation logic and business rules will be applied in the extracted data and converted into SF Learning History Connector format. The final file will be sent to SF LMS. As a best practice, do the following:

- First, load a sample Learning History record with different item types and completion types format, to test the file format and data elements and fix any issues in the files.
- Then load all records in batches of 100,000 records in SuccessFactors LMS. It should take less than 30 minutes to complete the import process. A large amount of data will take more time to import and the log file will be generated only after all the records have been imported. Therefore, it is recommended to load the data in batches to reduce the cycle time and to make troubleshooting easier.

5.7.1 File Extract Overview

The data extract file must contain the following elements to be consistent with SF LMS:

- The character set must be UTF-8.
- The column delimiter character must always be a pipe ("|").
- The row delimiter character must be !##!.
- The header record must be the first row of the input file.
- All columns indicated in the header row must be supplied in the input file with either a value or a null ("|").
- Data extracted must not contain any unaccepted characters (such as foreign typesets).

Unless otherwise noted, the date format must be MON-DD-YYYY HH24:MI:SS.

Best Practices for Learning History Import

Before the import, it is recommended to do the following:

- Complete the data mapping between the Legacy Learning System and SF LMS. For more information, see KBA [2318341 - Connector Knowledge support and tips](#).
- Review the connector configuration in SF LMS to make sure all the details are updated correctly.
- Review the reference data to see that Completion Status, Item Type, and E-Signature Code are created in SF LMS.
- Check that all the items and User accounts are created in the SF LMS. Note: Items that are only required for history and will not be used going forward should be marked as inactive.
- Make sure special characters are not used in the comments.
- Make sure character limitations are followed in the Learning History connector template.
- Before the import, check that all mandatory columns in the connector are updated.
- Check that data transformation starts after all the relevant reference data has been defined.
- Start loading the data in SF LMS after all the relevant reference data and configuration has been configured in the SF LMS.

6 ASSUMPTIONS AND EXCLUSIONS

N/A

7 REFERENCES

SAP Help Portal

- Guide

[SuccessFactors Learning administrators](#)

SAP Notes/KBA

- [2369631 - How to add a custom tile with image and link - SAP SuccessFactors Learning](#)
- [2596546- Custom Tiles | How to assign them to a restricted group of people?](#)
- [2398524 - Adding Video to the News Page](#)
- [2398563 - How to edit the News page \(User side\)](#)
- [2784345 - Course Catalog Best Practices - Learning Administration](#)
- [2784084 – Collections Best Practices - Learning Administration](#)
- [2642344 - Learning History Connector template filename and headers](#)
- [2318341 - LMS Connector Knowledge support and tips](#)

IDPs

- [Impact of Implementing SAP SuccessFactors Employee Central](#)
- [SAP SuccessFactors Learning: Implementation Considerations for Efficient Security Design](#)

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