Administration Guide CUSTOMER

SAP SuccessFactors Learning
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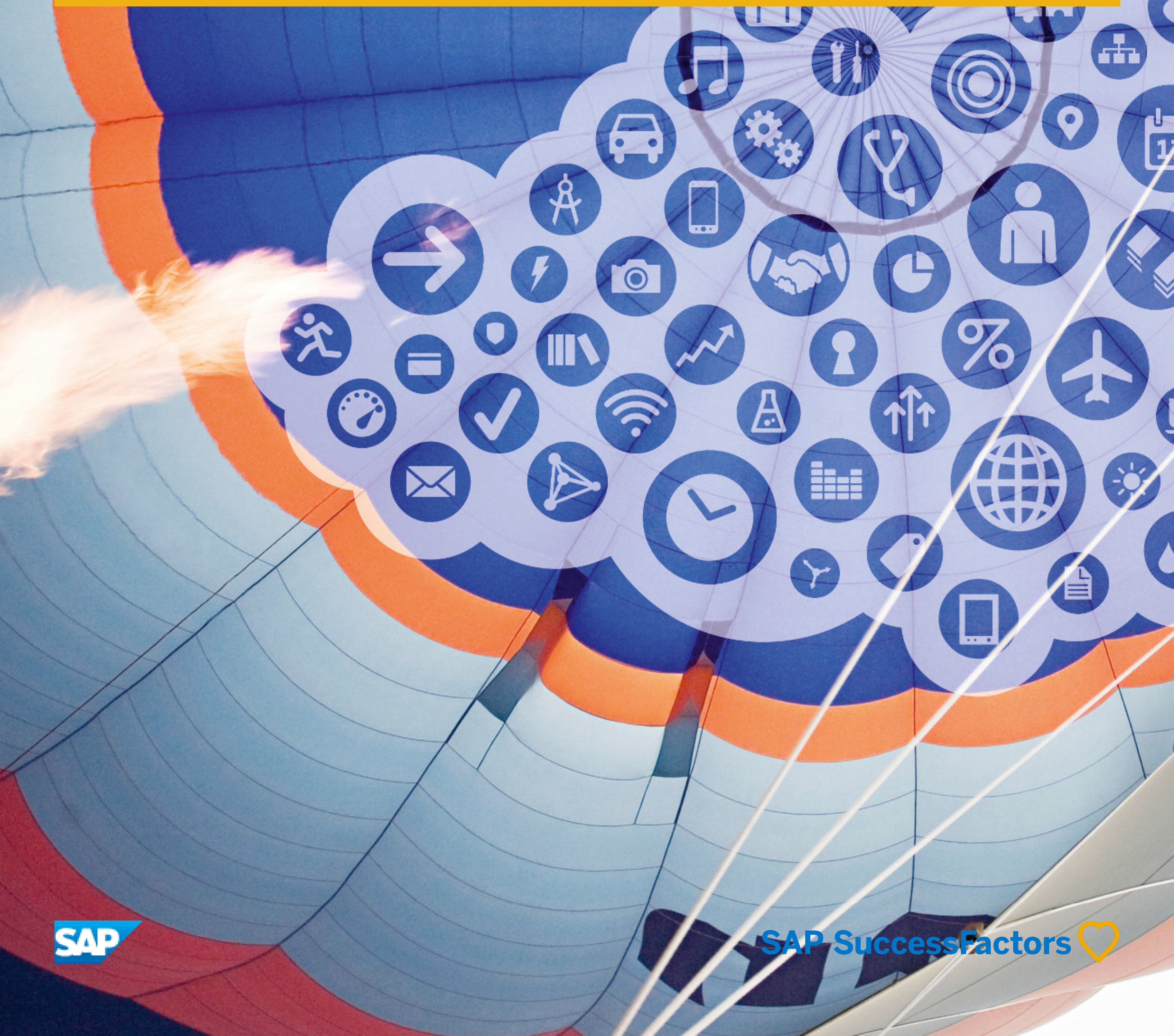
Commerce



SAP SuccessFactors

Content

What's New in This Guide

Q3 2016

Table 1: The following table summarizes changes to this guide for the Q3 2016 release

What's New	Description	More Info
Initial Publication	The Commerce guide is for understand-ing commerce functionality within SAP SuccessFactors Learning	

1 Commerce

View this section if you want to know about commerce.

Commerce has a set of available functions and tools that allow administrators to track resource costs incurred in the delivery of training and the tuition (pricing) charged for a user to attend or launch a training event. Commerce is strictly a system that tracks transactions such as credit and debit values. There is no exchange of money in Commerce without the addition of an optional eCommerce integration such as PayPal Pro. eCommerce does, however, introduce a new payment method within Commerce.

OData APIs, Supervisor Tools, Record Learning for User and Supervisor are not supported in Commerce.

> **Note**
>
> In *System Admin* > *Configuration* > *System Configuration*, there is a commerce toggle controlling the display of currency and price for internal and external users (external user configuration also includes sites):
>
> **Sample Code**
>
> ```
> # This configuration is used to show/hide price related search features and
> indicators in specific user screens.
> # When set to false, catalog search will not include currency filter or price
> sorting and prices will not be displayed in user catalog, user registration and
> available offerings.
> # WARNING: This configuration does not turn off commerce functionality and
> should not be set to false if any learning has a Price associated for the
> respective user group.
> showPricingInternalUsers=true
> showPricingExternalUsers=true
> ```
>
> We highly recommend that this feature never be turned on when pricing is used for that user type.

2 Master Inventory

View this section if you want to know about master inventory for commerce.

The master inventory stores all items and materials available in the application and sets their default price. Catalogs are populated from the master inventory.

Table 2:

This field...	...Is Used as Follows
SKU	Stock Keeping Unit is a unique inventory ID of the selected item.
Item or Material	The name and last revision of the item or the name of the material.
Inventory Type	The inventory type of the selected item: Item or Material.
Classification	The type of classification: Instructor-led, Online, or Other. Other can include such as books or documents.
Published Price (@)	The price published for one unit of the selected item.
Cancel Policy ID	The ID of the cancellation policy for the selected item. Cancellation policies are managed in *Commerce* > *Cancellation Policies*.
Display in Catalog	This check box, when selected, indicates that the selected item appears in the master catalog.
Scheduled Offering ID	The unique ID of the scheduled offering.
Date/Time	The date and time of the scheduled offering. The date and time appears in the time zone defined in the *Scheduled Offering Summary*.
Facility	The facility associated to the scheduled offering.
Published Price	The price published in the catalog for the selected offering.

3 Account Codes

View this section if you want to know about account codes for commerce.

The account code is one way to track the transactions. It is a unique code created to track the chargeback information of a transaction for the ledger. You define the unique *Account Code* when you create it. Once the code has been created, you cannot edit the *Account Code* field. Like organizations, groups have an account code association to allow for slot commerce purchase validation.

3.1 Summary Tab

View this section if you want to know about the Account Codes Summary tab.

In the *Summary* tab, you can view, add, or edit information in the *Description* and *Domain* fields of the selected account code. Once the account code has been created, you cannot edit the *Account Code* field.

Table 3:

This field...	...Is Used as Follows
Account Code	The unique ID of the account code. Like organizations, groups have an account code association to allow for slot commerce purchase validation.
Description	A description of the account code. This description should be intuitive for others to relate to easily.
Domain	You can associate a record with an access domain to control the administrators who can access the record. What an administrator can access and do for a record depends on how you configured the entity, function, and workflow domain restrictions of the role ID that is associated with the administrator. For more information about how you can configure access to records, see Security.
Account Code Type ID	This is the account code type from *References* > *Commerce*. Account codes help outside systems understand the categories of transactions. Your account codes depend on how you set up your outside financial system to categorize accounts.

This field...	...Is Used as Follows
Company Code	The company code is a unique ID for a company in your outside financial system. The codes that you use depend on how your external system is configured.
Controlling Area	The controlling area is a unique ID for your accounting controlling area. In most cases, you have only one controlling area for all account codes. In some more complex financial systems, however, you can have more than one controlling area. Your controlling area depends on the configuration of your external financial system.

3.2 Profit Centers Tab

View this section if you want to know about the Profit Centers tab for Account Codes.

In the *Profit Centers tab*, you can view, add, or edit the entities/accounts that are credited for the selected account code.

Table 4:

This field...	...Is Used as Follows
Account Code	The account code that is credited as part of the profit center.
Description	A description of the account credited.
Distribution	Percentage of the total credit to be distributed to the account line item.

3.3 The Importance of Account Code Type, Company Code, and Controlling Area

If you are using commerce features, you likely pull data from the transactions table, where account code type, company code, and controlling area are important categorization tools.

External financial systems need attributes to categorize transactions. The attributes help the external system categorize the transaction. You might want to see all transactions in a given company code, for example, or all transactions of a given account code type.

SAP SuccessFactors Learning does not use account code type, company code, or controlling area for itself. We simply make them available on the accounts. Your particular values for these three fields will depend on your external financial system.

4 Order Management

View this section if you want to know about order management.

Order Management (*Admin* › *Commerce* › *Order Management*) is used to view and edit orders in the system. You see the order number, status, and the items in individual orders. You can also create refunds for a whole order or for an individual line item.

4.1 Summary Tab

View this section if you want to know about the Order Management Summary tab.

The Summary tab (*Admin* › *Commerce* › *Summary*) contains the status and contents of the selected Order Number.

Table 5:

This field...	...Is Used as Follows
Order Type	The system has four order types: SEAT-ENROLL, SHOPPING-CART, SLOTTING, and EVHST. • SEAT-ENROLL-Orders placed through registration into a scheduled offering. • SHOPPING-CART- Orders placed using the shopping cart. • SLOTTING: Orders placed by the purchase of slots. Like organizations, groups have a commerce association to allow for a slot commerce purchase. • EVHST: Orders created by the learning event editor.
SKU	Stock Keeping Unit (SKU) is an inventory mapping mechanism used in catalogs.
ID	The title, ID, and revision of an item in the order.
Course Details	The Item Name and date of most recent revision.
Offering Details	The indicated time of delivery of the selected order.
Qty (Quantity)	The quantity of item in the order.
Unit Price	The price per unit of the item in the order. Click *Add Refund* to add a refund to the item.

This field...	...Is Used as Follows
Extended Price	The first row of this column displays the price for the entire order. All other rows display the amount of refunds for the corresponding line item and for the entire order.
Charged Amount	The charged amount is the amount that was actually charged for the order. Pending order, for example, appear with a zero (0.00) charged amount when a user is on the waitlist or registration approval is pending and the charged amount is still zero. **Note** In *Learning* > *Scheduled Offering* > *Registration* > *Advanced*, the *Advanced Settings* popup includes a *Charged Amount* column.
Cost Center	The account code debited in the transaction. To change the cost center, click *Change Cost Center*. Like organizations, groups have an account code association to allow for slot commerce purchase validation.
Profit Center	The entity/account credited in the transaction. To change the profit center, click *Change Profit Center*.
Order Status	Current status of the line item. You can create a new order status (*References* > *Commerce* > *Order Status*). To change the status, click *Change Status*. You can also remove a refund from an item by clicking the *Remove Refund* link in the Status column.
Add Refund Link	Use this link to make a refund to a line item. • Price Paid: The paid cost of the order. • Additional Refund Possible: This is the grand total and therefore the maximum amount for which you can make a refund. • Refund Amount: The amount you wish to deduct from the Price Paid as a refund for a line item. **Note** In *Learning* > *Scheduled Offering* > *Registration* > *Advanced*, the *Advanced Settings* popup includes a *Refund Amount* column. • Comments: In the text box you can include comments regarding the refund.

This field...	...Is Used as Follows
Add Refund Button	Click the *Add Refund* button to add a refund for the entire order. • Order Total: The total amount for the order. • Refund Amount: The amount you wish to deduct from the Order Total as a refund for the entire order. • Comments: In the text box you can include comments regarding the refund. • Cost Center: May be provided based on line items on the order but the admin can change it. Click the Cost Center link to add an account code. When one or more account codes have been added, you can edit the Account Code Distribution list. • Profit Center: May be provided based on line items on the order but the admin can change it. Click the Cost Center link to add an account code. When one or more account codes have been added, you can edit the Account Code Distribution list.
Grand Total	The total for the entire order minus the refunds. Both the extended price total and the charged amount total are displayed.

4.1.1 Creating a Purchase Refund

View this section if you want to know about creating a purchase refund.

You can create refunds for the whole order or for an individual line item.

Order Refunds and Line Items Refunds

There are two kinds of refunds that you can create:

- Order Refunds: This is a refund that is deducted from the entire order total.
- Line Item Refunds: This refund deducts a given amount from the cost of a single line item. For example, if there is an order for three scheduled offerings and one is canceled you would perform a line item refund for that item. You can override the cancellation policy assigned to the scheduled offering by entering a different refund amount. The Cancellation Policy is the set of rules used by the system to calculate what the user is charged upon canceling the scheduled offering of an entry or activity.

You can change the Cost Center and Profit Center for an ORDER REFUND but you cannot make those changes for a LINE ITEM unless you make adjustments in the ORDER REFUND first. Then the changes are automatically applied to the line item.

Refund Amount Limitations

There are limitations on refund amounts.

- A maximum order refund is calculated in the following way:

1. Add all (non-refund) line item prices.
2. Subtract all line item and order refunds from the total calculated in the previous step.

- A maximum line item refund is calculated in the following way:

1. Subtract all the line item refunds from the item price to have the line item total
2. Select least amount from the max order refund and the maximum line item refund.

Refund Rules

The following is a list of rules you must follow in order to perform a refund:

- You can create a refund only if the Order Status is Approved, Fulfilled, or Cancelled.
- The refund amount cannot be less than or equal to zero.
- In the case of an order refund, the total refund amount cannot exceed the order total.
- In the case of a line item refund, the line item refund amount cannot exceed the current line item total or the current order total, whichever is lower.
- The Refund Amount is editable if the Transaction Type is “Chargeback”.

4.1.2 Canceling an Order

View this section if you want to know about canceling an order.

An order can be canceled in the Order Management's *Summary* tab. Find the order ID and go to the corresponding Status column. Click the *Change Status* link. From the *Change Order Status To* drop-down menu, select *Cancelled* and click *Apply Changes*.

You can also cancel an order in the Scheduled Offering module. There are a couple of ways to accomplish this:

- Remove a User from the Offering: Navigate to *Admin* > *Learning* > *Scheduled Offerings*. In the *Edit the Registered Users for the Scheduled Offering* section, find the user you wish to remove and click the corresponding *Select* check box. Click the *Remove* button.
- Cancel the Enrollment: As an alternative, navigate to *Admin* > *Learning* > *Scheduled Offerings*. In the *Edit the Registered Users for the Scheduled Offering* section, find the user you wish to remove, go to the Registration Status column and click the *Edit* link. From the *Registration* drop-down menu, select *Cancelled* and click *Apply Changes*.

4.1.2.1 User-Facing Cancellation Policy

In *References* > *Commerce* > *Cancellation Policies*, an administrator with Edit Cancellation Policy workflow can create a cancellation policy description that can be displayed to a user, supervisor or approver in their language before registering, purchasing or approving learning that has a cancellation policy.

The description can be rich text if you go into *System Admin* > *Configuration* > *System Configuration* > *LMS_ADMIN* and enable HTMLDescriptions=true.

The user-facing cancellation policy applies to blended or scheduled offerings with a price greater than zero and cancellation policy.

Approval notification for registration and withdraw will also include the cancellation policy.

When an administrator enters a user-facing cancellation policy with HTML descriptions enabled, new cancellation policies or those existing before a system upgrade will not be enabled and have a blank description.

When entering a user-facing cancellation policy with HTML descriptions **not** enabled in *Cancellation Policies* > *Edit the Cancellation Policy* > *User-Facing Cancellation Policy*, please check the *Enable* check box and then provide a description. Translation functionality is available by clicking the open localization icon. When finished, click *Apply Changes*.

After providing your user-facing cancellation policy descriptionin non-HTML, you can review the and enable the user-facing cancellation policy description by selecting the *Enable* check box and click *Apply Changes*.

Internal users can view the cancellation policy by clicking the *Cancellation Policy* link from the Registration page.

External users can view the cancellation policy by clicking the *Cancellation Policy* link from Checkout.

When a user withdraws from a scheduled offering and it has a cancellation policy, a *Cancellation Policy* link is available for the user.

Approvers can view a cancellation policy from the *Registration* or *Withdraw Confirmation* screens by clicking the *Cancellation Policy* link.

When a supervisor registers others from the catalog or bulk registration tool, the supervisor can view a cancellation policy by clicking the *Cancellation Policy* link.

> **Note**
>
> The Cancellation Policy is not available in the old Supervisor tools.

An administrator with General System Settings workflow can optionally set a Default Item Cancellation Policy in *System Admin* > *Configuration* > *Global Variables* > *General Settings* section by selecting a cancellation policy from the “Default Item Cancellation Policy” pull down menu.

> **Note**
>
> Any new item created after the item cancellation policy is set will automatically have the default cancellation policy.

4.1.2.2 Setting Cancellation Policy on Item Pricing or Scheduled Offering

Administrators can set, change or remove a cancellation policy on the Pricing tab of an item or scheduled offering.

If you have access to an Item and Edit Item Cost/Price workflow, you can now set, change or remove a cancellation policy on the pricing tab of an item. If the item has active scheduled offerings with an end date in the future, you can propagate the setting or change the item's cancellation policy to those scheduled offerings.

If “Scheduled Offering Can Override Item Cancellation Policy” is checked on a learning item, an administrator with access to a Scheduled Offering and Edit Scheduled Offering Cost/Price workflow can set a cancellation policy on a scheduled offering.

The cancellation policy on the item and scheduled offering can be set independently. An item's cancellation policy could be blank and a scheduled offering for that item could have a cancellation policy if an override at the scheduled offering level is enabled.

Table 6:

This Function...	...Is Used as Follows
New Item or Scheduled Offering	When a new item is created, the cancellation policy is set to the system default (which can be blank) and the Scheduled Offering override is checked. When a new scheduled offering is created, it will have the cancellation policy of its item.
Master Inventory	A Search Master Inventory workflow is no longer required to set a cancellation policy. The cancellation policy can be set for an item in the Master Inventory without requiring the existence of scheduling offerings. Scheduled offering cancellation policy information will be displayed in the Master Inventory, but not editable.
Copy	When an item or scheduled offering is copied, the cancellation policy of the item or scheduled offering copied will be set on the new item or scheduled offering.
Revision	When an item is revised, the cancellation policy is on the new revision; however, the cancellation policy is not available on the old revision.
View Workflows	Administrators with View Item Cost/Price or View Scheduled Offering Cost/Price workflows can view the cancellation policy on the *Pricing* tab.

This Function...	...Is Used as Follows
Connectors	Item or Scheduled Offering Connector is updated to include a Cancellation Policy ID. If blank, when creating an item, the cancelation policy will be set to the system default; when creating a scheduled offering, the cancellation policy will be set to that of the parent item. When updating an existing item or scheduled offering, if blank, any existing cancellation policy will not be deleted.
System Upgrade	Any pre-existing items that had a cancellation policy associated to its SKU or scheduled offerings associated to those items will have a cancellation policy after Q3 2015 release upgrade.

4.1.2.3 Full Refund to Users Who Withdraw then Re-Enroll for Same Scheduled Offering

Cancellation policy enables administrators to issue a full refund if a user withdraws and then re-enrolls for the same scheduled offering.

If your company has a policy where any cancellation fee is waived if the user re-enrolls for the same scheduled offering, you can enable an automatic issuance of this refund in support of such a policy through a configuration.

When a user withdraws and receives a partial refund; then, at any time, re-enrolls for the same scheduled offering, the system automatically issues a full refund on the previous withdrawal.

- The refund is applicable to internal and external users, supervisor, delegate or an administrator registering a user.
- User will receive an information message and can continue or cancel.
- The refund is processed using the same payment method as original order and will be the financial transaction type CANCEL REFUND.
- The refund amount may be limited if order level refunds exist.

When a user re-enrolls for the same scheduled offering, or when administrator or supervisor re-enrolls a user for the same scheduled offering, the message is typically the same on the *Registration* page. For example:

- *User re-enrolls message* - "Your previous order, ORDNO-3001, for this scheduling offering was cancelled. Completing this registration will create a new order and a refund of 60.00 USD will be applied to the previous order."
- *Connector Run Details message* - "The User has a previous order for this scheduled offering that was cancelled. A refund was applied to the previous order. User ID:Bipin-1511-user1"
- *Admin re-enrolls user Warning details* - "The User, Bains, Cathy, has a previous order for this scheduled offering that was cancelled. Completing this registration will create a new order and a refund will be applied to the previous order."
- *Delegate with learning plan permission re-enrolls user message* - "Your previous order, ORDNO-4004, for this scheduling offering was cancelled. Completing this registration will create a new order and a refund of 80.00 USD will be applied to the previous order."

- *Supervisor re-enrolls user message* - "Your previous order, ORDNO-4002, for this scheduling offering was cancelled. Completing this registration will create a new order and a refund of 80.00 USD will be applied to the previous order."

Additional impacts where the re-enroll message applies typically across the board:

- Data import tool for registration entity
- Registration assistant (if user was previously removed)
- Purchasing assistant

When you are in an order as the finance administrator in *Order Management* > *Summary* > *Edit the Order* > *View Order Status* > *Edit Order Items*, you can see that the user received a refund because they re-enrolled. The order number that triggered the re-enroll refund will be recorded in the financial transaction comment. The re-enroll order number is not recorded when triggered from the connector.

4.2 Commerce Tab

View this section if you want to know about the Order Management Commerce tab.

On this tab, you can add, edit, or view the shipping information.

Table 7:

This field...	...Is Used as Follows
Name	The name of the addressee for shipping.
Address 1	The first address line.
Address 2	The second address line.
City	The city of the addressee.
State/Province	The state or province of the addressee.
Country	The country of the addressee.
Postal Code	The postal code of the addressee.
Contact Name	The contact name of a recipient.
Contact Telephone	Contact telephone of the recipient..
Fax	The fax number of the recipient..
Email	The email address of the recipient.

4.3 Financial Transactions Tab

View this section if you want to know about the Order Management Financial Transactions tab.

You can view financial transaction information for an order via *Commerce* > *Order Management* > *Financial Transactions* tab. You can view the transaction type, item/material, order information, total price, account codes, whether the order has been approved and posting status. Under the Account Codes column, you can view account code, cost center and profit center details of a financial transaction. This information can aid you when troubleshooting customer issues or performing financial investigations.

4.3.1 Domain Restrictions and Access to Financial Transactions from Order

Administrators can set domain restrictions on order and financial workflows.

You can now set a domain restriction on the following order and financial workflows based on a purchased item or scheduled offering:

- Order: Search, Edit, View
- Financial Transaction: Approve, Search, View

The data import/export tool for the record type Admin Roles now includes the Domain Restriction ID for a workflow.

When copying a role and “Copy Workflow Domain Restrictions” is selected, restrictions on order or financial transaction workflows will be on the new role.

Run Financial Transaction CSV Report has been changed universally to support domain restriction based on the item or scheduled offering purchased versus the user. The report excludes financial transactions that are not accessible to the admin.

You can now view all financial transactions associated to an order from *Order Details* or the *Order* link from *Scheduled Offering* > *Advanced* if you can view or approve financial transaction workflow.

Order search results in *Commerce* > *Order Management* > *Search* are based on the Search Order workflow domain restriction. View and edit icons are displayed if the corresponding workflow is in the admin's role. Domain restriction for *View* and *Edit* is enforced on the *Order Detail*.

In *Commerce* > *Order Management* > *Order Detail - Summary*, if the item or scheduled offering is associated to the order line is in a domain that you can access, that line is displayed.

If at least one line has an item or scheduled offering that is not your Domain Restriction, the message, "You do not have permission to edit all items in this order" is displayed.

Visible lines are editable (add refund, edit payment information, or price) if the user has the Edit Order workflow.

> **Note**
>
> Order total reflects all transactions.

In *Commerce* > *Order Management* > *Order Detail - Summary - No Domain Restriction*, Commerce data is editable if any purchased item or scheduled offering is in the user's domain restrictions for *Edit Order*.

> **Note**
>
> The order level refund is not available unless you have edit workflow for all items on the order.

In *Commerce* > *Order Management* > *Order Detail - Financial Transactions*, for *Financial Transaction*, the system is using the domain restriction on the financial transaction workflow and not the order workflow.

If the item or scheduled offering associated to the financial transaction is in a domain that you can access, that transaction is displayed.

If at least one transaction is for an item or scheduled offering not in your domain restriction, the message, “You do not have the required permissions to view all financial transactions for this order” is displayed.

In *Commerce* > *Order Management* > *Order Detail - Financial Transactions*, for *Financial Transaction - No Domain Restriction*, with view only workflow, you would not see actions and Approve status is read-only.

In *Learning* > *Scheduled Offerings* > *Registration* > *Advanced* > *Order Detail* > *Financial Transactions*, if the item or scheduled offering associated to the financial transaction is in a domain that the admin can access, that transaction is displayed.

In *Learning* > *Scheduled Offerings* > *Registration* > *Advanced* > *Order Detail* > *Financial Transactions - No Domain Restriction*, if at least one transaction is for an item or scheduled offering not in your domain restriction, the message, “You do not have the required permissions to view all financial transactions for this order” is displayed.

In *Learning* > *Scheduled Offerings* > *Registration* > *Advanced*, all order numbers associated with a user are displayed through the enrollment with the most recent first.This allows you to actively track orders associated with a user.

5 Unused Order Tickets

View this section if you want to know about unused order tickets.

The Unused Order Ticket wizard (*Admin* > *Commerce* > *Unused Order Tickets*) displays unused tickets of a shopping cart.

Table 8:

This field...	...Is Used as Follows
Item ID	A unique ID for the selected item.
Ticket Number	A system-generated unique ID for each purchase in the system. An order ticket can include multiple units of the entry purchased.
Usages	Displays the number of times the order tickets for the selected entry has been used. It is displayed in the format **number used** of **total number** of items purchased.

6 Financial Transaction Fields

View this section if you want to know about Financial Transaction fields.

Table 9:

This field...	â€¦Is Used as Follows
Transaction Type	The type of transaction for the line item: Adjust Refund, Adjust Charge, Cancel Refund, Cancel Charge Register, or Purchase.
Item/Material	The Type, ID, and Revision Date and Time of the item/material. The Schedule ID also appears with its Date and Time.
Order Information	The Shopping Account ID, Order ID, and Date and Time the order was placed.
Total Price	The price per item/material.
Account Codes	The Cost and Profit centers associated with the corresponding item/material. Like organizations, groups have an account code association to allow for slot commerce purchase validation. Click the *View Details* link to view the details of the Account Code.
Approve	Select to mark a line item for approval. Approved financial transactions are available to a client that gets financial transactions for an outside financial system.
Posting Status	The status of the transaction related to an external financial system. Although the exact status can differ depending on your external financial system, a status of FAILED is common. It tells you that something was wrong with your transaction (a bad amount or bad account code, for example). The financial system can provide an explanation under the status. Use the explanation, if provided, to troubleshoot the transaction.
Retry	Select *Retry* after you have fixed failed transactions and you want to queue the transaction for reposting to the financial system.

Related Information

Approving Financial Transactions [page 22]
Fixing and Reposting Financial Transactions [page 22]

6.1 Approving Financial Transactions

Approve financial transactions to mark them for posting to your financial system.

Procedure

1. Go to *Admin* > *Commerce* > *Financial Transactions*.
2. Search for financial transactions in the *Non-Approved* or *Both* status.

   Tip

   If you do not see the financial transactions search filter, click *Add/Remove Criteria*.
3. Look at the transactions and decide which transactions you want to approve.

   Approved transactions can be fetched by your external financial system. The external financial system fetches them through SAP SuccessFactors Learning web services. Even if you do **not** have an external financial system, approval is still useful for your records.
4. For the transactions that you want to approve, select the *Approve* check box.

   Tip

   To approve all in a page, select the check box in the heading of the *Approve* column.
5. Click *Save*.

Related Information

Fixing and Reposting Financial Transactions [page 22]

6.2 Fixing and Reposting Financial Transactions

Fix and repost financial transactions when your external financial system rejects the transaction.

Prerequisites

To repost financial transactions, you must be posting them to an external financial system. You must also have the security workflow: Manage Financial Transactions Posting.

Context

If you post financial transactions to an external system, SAP SuccessFactors Learning makes all approved transactions available. Your financial controllers, however, might view a transaction that posted to the financial system and reject it. If the transaction is rejected, it returns to *Admin* > *Commerce* > *Financial Transactions* with a failed or rejected status and a reason for the rejection. For example: “invalid account code”.

> **Note**
>
> Both the exact status and the reason differ depending on your external financial system and company policy.

Procedure

1. Go to *Admin* > *Commerce* > *Financial Transactions*.
2. Use the search criteria to narrow the list of financial transactions.

   > **Tip**
   >
   > Look for approved financial transactions over a recent time frame.

3. Look in the *Posting Status* column for FAILED.

   > **Remember**
   >
   > The status FAILED is common, but the exact text depends on your financial system. For example, your financial system might use the phrase REJECTED instead. We represent the exact string that your financial system sends us because it has a specific meaning in your business case, but this means that these instructions cannot know the exact text.

4. Look in the same column for the reason that the failed transaction was rejected, and then investigate and fix the transaction.
5. After you fix the transaction, go back to *Admin* > *Commerce* > *Financial Transactions*, find the transaction, select *Retry*, and then click *Save*.

Next Steps

When you select *Retry* and save, SAP SuccessFactors Learning marks the transaction for retry the next time the financial system fetches the transactions. Depending on how you built your client to get the transactions, there could be a delay between marking the transaction for retry and the client getting the transaction.

Related Information

Approving Financial Transactions [page 22]

7 Coupons

View this section if you want to know about coupons.

The main purpose for creating coupon records (*Admin* > *Commerce* > *Coupons*) is to offer incentives, and thereby offset the costs, to groups of users for their course offerings. For example, you could create coupons for all new items that you create as a way to market and increase participation in a course.

Coupon descriptions are now Rich Text Editor enabled. During checkout, users have the ability to review all available coupons by clicking the *Enter Coupon Code* link, if coupons are available.

7.1 Setting Up Coupons

View this section if you want to know about setting up coupons.

Setting Up or Modifying User Records

To get started with coupons, you need to ensure that you have users who can add items to a shopping cart from the user interface. To add items to a shopping cart, users must have their shopping account enabled. On the *Commerce* tab of the user record (*Admin* > *Commerce* >), select *External* from the Shopping Account Type list and select the *Enable Shopping Account* check box. In the user interface, the shopping cart is available only to external users.

Setting Up or Modifying Coupon Records

After creating the coupon record, you must associate it with one or more item records (*Admin* > *Commerce* > *Coupons* > *Items tab*). The system allows end users to apply the coupon only to items that appear on this tab. If the coupon type is Specified Amount (set when you create the new coupon record), then you can add a specified amount off any item on the *Coupon Values* tab for any currency record (*References* > *Commerce* > *Currencies*) that you have defined.

Setting Up or Modifying the Assignment Profile Records

If the assignment profile records don't exist, for the group of users you want to target, then create them now.

While you can associate coupons with assignment profiles from the coupon record, we recommend that you use the *Coupons tab* of the assignment profile record because you must propagate the assignment profile record after you modify it by adding the coupon records, and you can propagate an assignment profile only from an assignment profile record. After you propagate the assignment profile, **external** users who have their **shopping carts enabled** and who are part of the **assignment profile** can add apply the **coupon** to any item that was **on the** *Items* **tab** of the coupon record after they add the item to their shopping carts.

Using a Coupon in the User Interface

You can choose to display a Coupons window always, never, or only when a user has active coupons by selecting that option in the Coupon Display Settings area of User Settings (*System Admin* > *Configuration* > *User Settings*). To redeem or apply the coupon, the user must hover the mouse on *Available* or *Expiring* symbols in the Coupons window and take note of or write down the **coupon code** (the coupon code is the value that you type in the *Coupon Code* box as you create a new coupon record). After adding one of the items that appear on the Items tab (*Commerce* > *Coupons* > *Items tab*) of the coupon record, the user can click the *View Shopping Cart* link from the Easy Links area of the home page. The user must type this **coupon code** in the *Enter Coupon Code* box when checking out the shopping cart.

Maintaining a Coupon Record (for Administrators)

You can configure the Coupon Expiration Notification automatic process (*System Admin* > *Automatic Processes* > *Coupon Expiration Notification*) to send an email notification to the value in the *Owner Email* box of the expiring coupon record. The system uses the ApmCouponExpiry notification template for this notification.

Related Information

Assignment Profiles Tab [page 31]
Coupons [page 25]

7.2 Coupons Summary Fields

View this section if you want to know about Coupons' Summary fields.

A system administrator can choose which controls to display and the order in which they display by modifying the record configuration; therefore, we list each control that you might be able to access in alphabetical order.

Table 10:

This Field...	...Is Used as Follows
Active	When you make a record inactive, the system does not include that record in any searches or reports by default; however, some searches and reports allow you to override the default so that you can include inactive records. You might make a re-cord inactive (rather than delete it) if you no longer want to use it but keep it for a historical record. Because you cannot restore a deleted record, we recommend that you delete a re-cord only when you make a mistake in some way (for example, if the record ID is simply incorrect).
Coupon Code	You can only edit the value in the *Coupon Code* box as you are adding a new coupon record. The coupon code serves as the unique ID for the coupon record. To redeem a coupon in the user interface, users must provide the value from the *Coupon Code* box. Therefore, we recommend that you expose this value to users by including it in the *Coupon Name* or *Description* boxes. For example, you could include something like the following in one of these boxes: “To redeem this cou-pon, enter coupon code COUP-123.”
Coupon Name	Because the content of this box appears in the user interface and in reports, we recommend that you use the box to sum-marize the purpose of the record. To fully explain the purpose, you can use the *Description* box. To redeem a coupon in the user interface, users must provide the value from the *Coupon Code* box. Therefore, we recommend that you expose this value to users by including it in the *Coupon Name* or *Description* boxes. For example, you could include something like the following in one of these boxes: “To redeem this cou-pon, enter coupon code COUP-123.”

This Field...	...Is Used as Follows
Coupon Type	If you select *Specified Amount* from the *Coupon Type* list, then you can use the *Coupon Values tab* to identify the value of the coupon in multiple currencies. If you select *Percentage* from the *Coupon Type* list, then you do not need to use the *Coupon Values* tab: in this case, the system provides a percentage discount regardless of the item's currency. **Note** After you create a coupon, you can change the coupon type from *Specified Amount* to *Percentage*, and vice versa. However, when you do so, you must also modify the value in the *Percentage* box (type a value when switching to *Percentage* and clearing the value when switching to *Specified Amount*). If you switch from *Percentage* to *Specified Amount*, then you must add at least one currency to the *Coupon Values* tab.

<table>
<tr><th>This Field...</th><th>...Is Used as Follows</th></tr>
<tr><td>Coupon Value</td><td>As you add a new record, the choice that you make for the Coupon Type list determines how you manage the value (specified amount or percent) of the coupon.

Table 11:
<table>
<tr><th>As you add a new record, if you select....</th><th>Then...</th></tr>
<tr><td>Specified Amount from the Coupon Type list,</td><td>the system allows you to enter a value into the Coupon Value box that for the global default currency. After you add the coupon record, you can configure and manage all of the (specific amount) discounts on the Coupon Values tab, where you can identify the value of a coupon in any one of the currencies that you have created.</td></tr>
<tr><td>Percentage from the Coupon Type list,</td><td>the system allows you to enter a percentage value into the Coupon Value box. After you add the coupon record, you can manage the percentage off that the coupon is worth by using the Percentage box (Commerce > Coupons > Summary tab).</td></tr>
</table></td></tr>
<tr><td>Description</td><td>Because the content of this box appears in the user interface and in reports, we recommend that you enter a description that helps users identify the record or its purpose. To redeem a coupon in the user interface, users must provide the value from the Coupon Code box. Therefore, we recommend that you expose this value to users by including it in the Coupon Name or Description boxes. For example, you could include something like the following in one of these boxes: “To redeem this coupon, enter coupon code COUP-123.”</td></tr>
</table>

This Field...	...Is Used as Follows
Domain	You can associate a record with a domain to control the administrators who can access the record. What an administrator can access and do for a record depends on how you configured the entity, function, and workflow domain restrictions of the role ID that is associated with the administrator. For more information about how you can configure access to records, see Security.
Max Uses	If you want to limit the total number of times a coupon can be applied (regardless of the user), then you can type that value in the *Max Uses* box. If you provide no value in the *Max Uses* box, then there is no limit on the maximum number of times that the coupon can be applied. However, if you also provide a value for the *Per User Limit* box, then the system allows a user to apply the coupon if 1) the value of the *Max Uses* box has not been reached and 2) the value of the *Per User Limit* box for that user has not been reached.
Owner Email	We recommend that you record the e-mail address of the person who maintains or owns the record so that other administrators have a contact if they need to use or modify the record.
Per User Limit	If you include a value in the *Per User Limit* box, then that value is the maximum number of times **any one user** can use that coupon in the user interface. If you provide no value in the *Per User Limit* box, then there is no limit on the maximum number of times **any one user** can apply the coupon. However, the system does not allow a user to apply a coupon if the value in the *Max Uses* box has already been reached.
Percentage	If you select *Percentage* from the *Coupon Type* list, then you can specify the percentage off value that the coupon is worth in the *Percentage* box.
Remaining Uses	This is a read-only value that displays the remaining number of times that users can redeem the coupon.
Unique Items	This is a read-only value that displays the total number of unique items that users have applied the coupon to.
Unique Users	This is a read-only value that displays the number of times a unique user redeemed the coupon.
Uses	This is a read-only value that displays the total number of times that all users have redeemed the coupon.

This Field...	...Is Used as Follows
Valid From	If you provide a date in the *Valid From* box, then users cannot redeem the coupon until on or after that date. If you leave the *Valid From* box empty, then users can redeem the coupon immediately.
Valid To	If you provide a date in the *Valid To* box, then users cannot redeem the coupon after that date has passed. If you leave the *Valid To* box empty, then users can redeem the coupon.

7.3 Items Tab

View this section if you want to know about Coupons' Items Tab

If you want to enable users to redeem a coupon for an item, then you must add that item to this tab (*Commerce* > *Coupons* > *Items tab*). The coupon is valid only for items on this tab.

7.4 Assignment Profiles Tab

View this section if you want to know about Assignment Profiles tab for Coupons.

On the *Assignment Profiles tab* (*Commerce* > *Coupons* > *Assignment Profiles tab*), you can view, add, or remove the coupons from an assignment profile. You must propagate the assignment profile, however, from the assignment profile record. Propagating updates the coupons window in the user interface, based on the settings that you selected for showing coupons in the Coupon Display Settings area of User Settings (*System Admin* > *Configuration* > *User Settings*). The assignment profile can have one of the following statuses: Valid (the assignment profile has been propagated), Add Pending (the assignment profile has not been propagated), and Delete Pending (the assignment profile has not been propagated).

Related Information

Propagating an Assignment Profile [page 32]
Synchronizing an Assignment Profile [page 32]

7.4.1 Propagating an Assignment Profile

View this section if you want to know about propagating an assignment profile.

After you create an assignment profile, you must propagate it so that users have assignments (curricula, competency profiles, catalogs, roles, or reviews) added or removed from their user record. Each time you update any part of the assignment profile, you must propagate it so that all users (existing or new) have the assignments added or removed from their user record. Because propagating an assignment profile can affect many records and be very time-consuming, you might have to propagate the assignment profile as a background job.

> **Note**
>
> The system never removes **an approved plan or its goals** when you propagate or synchronize an assignment profile.

7.4.2 Synchronizing an Assignment Profile

View this section if you want to know about synchronizing an assignment profile.

The system allows you to synchronize an assignment profile only after you have propagated it. When you click *Synchronize Assignment Profile*, you can schedule the job to run immediately or in the background. When the job runs, the system executes the Assignment Profile Synchronization automatic process but only for **this assignment profile**.

> **Note**
>
> The system never removes **an approved plan or its goals** when you propagate or synchronize an assignment profile.

When to Synchronize an Assignment Profile

Let's say that you just added 10 new user records for people who are starting with your company today. If they log in to the user interface, they have no items in their To-Do List and no access to any catalogs. For all new hires, however, your company wants them to take some "New Hire" orientation training, and your company has created a "New Hire" assignment profile that includes all new hires. In this situation, you could access the "New Hire" assignment profile and click *Synchronize Assignment Profile*. If you run the job immediately, then the new hires could log in to the user interface and access their orientation training on their first day of employment.

> **Note**
>
> The *Assignment Profiles tab* has a write-write relationship with the *Coupons tab* of the assignment profile record (*Users* > *Assignment Profiles* > *Coupons tab*), which means that you can manage the association between a coupon and assignment profile in either location.

8 Subscriptions

View this section if you want to know about Commerce subscriptions.

Subscriptions allow administrators to identify catalogs and organizations who should be granted free access to those catalogs. Catalog permissions are still managed by the assignment profile, but the subscription will override all pricing within the catalog. This free access can be granted for a limited time by applying an expiration date. The subscription record supports renewals by allowing an administrator to renew a subscription based on a set subscription period.

9 Purchase Orders

View this section if you want to know about purchase orders.

Purchase orders (*Commerce* > *Purchase Orders*) are used by organizations to allocate a monetary level of training for organizations and specific users. In the summary area, you can edit general information about the purchase order.

9.1 Adding a Purchase Order

View this section if you want to know about adding a purchase order.

Context

Navigate *Commerce* > *Purchase Orders* > *Add New* > *Add New Purchase Order* .

Procedure

1. Enter a Purchase Order ID number in the *Purchase Order ID* field.
2. Enter a name for the purchase order in the *Name* field.
3. Enter the domain name or select from a list of domain names by using the magnifying glass icon for the purchase order in the *Domain* field.
4. Check the *Active* check box to ensure your purchase order is enabled for editing and searches.
5. Enter a purchase order balance in the *Balance* field.
6. Enter a purchase date (or select the calendar icon to select a date) for the date the purchase order was created in the *Purchase Date* field.
7. Set your Low Balance Notification Threshold amount (currency) in the *Low Balance Notification Threshold* field.
8. Enter a description of the purchase order in the *Description* field. For example, you may want to note what courses have been purchased.
9. Add email(s) to the *Balance Notification Email(s)* field to receive a purchase order balance notification.
10. Enter relevant information for your purchase order in the *Notes* field.

10 Actions Menu

10.1 Bookmarking a Purchase Order

Follow this procedure to bookmark a purchase order in your *Bookmarks* tab. After you bookmark the purchase order, you can access the record quickly from the *Bookmarks* tab.

Context

To bookmark a record, it must be a primary record type, like users, learning items, or scheduled offerings. Primary record types have an *Actions* menu. Secondary types like Class or Position cannot be bookmarked.

Procedure

1. In the *Actions* menu, click *Bookmark*.
   The Bookmark As dialog appears.
2. Select the location for the bookmark.
   - Click *Add Folder* to add the bookmark to a new folder.
   - Select an existing folder from the list.
3. Click *Save*.

Results

The record is added to *Bookmarks*. Click *Bookmarks* to see the record and all other bookmarked records.

Next Steps

When you no longer need a record to be bookmarked, click *Unbookmark* in the *Actions* menu of the record.

10.2 Copying a Purchase Order

View this section if you want to know how to copy a purchase order.

Context

Navigate to *Commerce* > *Purchase Orders* > *Actions* > *Copy* > *Copy Purchase Order*.

Procedure

1. Enter a new Purchase Order ID number in the *New Purchase Order ID* field.
2. Check the *Copy User Data* check box to include user data.
3. Check the *Copy Organization Data* check box to include organization data.
4. Click the *Reset* button to clear the *New Purchase Order ID* field, the *Copy User Data* check box, and the *Copy Organization Data* check box if you need to start over.
5. Click the *Copy* button when finished.

10.3 Deleting a Purchase Order

View this section if you want to know how to delete a purchase order.

When you delete a purchase order in *Admin* > *Commerce* > *Purchase Orders* > *Actions* > *Delete*, you remove the purchase order completely from the system. You cannot recover the purchase order. The advantage of deleting a purchase order is that the purchase order no longer takes space in the database. Consider deleting purchase orders when you simply make an mistake: for example, if you add a purchase order that you didn't intend to add.

Alternative to Deleting a Purchase Order: Inactivation

As an alternative to deleting a purchase order, consider making it inactive. When you inactivate a purchase order, you keep its data in place, but remove it from active use. To inactivate a purchase order, clear: *Commerce* > *Purchase Orders* > *Summary* > *Active*.

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

Inactive users still count against the Max Headcount and Total FTE fields in a shared position. Administrators are warned but not prevented from exceeding max headcount and max FTE. Max Headcount and Total FTE are part of Plateau Legacy products.

11 Related Objects and Information

11.1 Purchase Orders' Organizations

View this section if you want to associate the purchase order with one or more organizations.

In *Commerce* > *Purchase Orders* > *Related* > *Organizations*, you can associate the purchase order with one or more organizations. The organization's description and Organization ID are displayed. You can also remove one or more organizations from the purchase order.

11.2 Purchase Orders' Users

View this section if you want to associate the purchase order with one or more users.

In *Commerce* > *Purchase Orders* > *Related* > *Users*, you can associate the purchase order with one or more users. The user's User Id, User Name, and Organization information are displayed. You can also remove one or more users from the purchase order.

12 Tools

View this section if you want to know about Commerce tools.

The tools section provides a set of easy-to-use wizards for the common tasks in its section. For example, tools in the learning section cover the closing and canceling of scheduled offerings, the scheduling of curricula, or sending notifications about scheduled offerings, and so on. The tools in the user management section deal with recording or editing learning events for users, merging multiple records for a single user, user needs management, and so on. The grouping of the tools by section may not always perfectly suit your needs. Therefore, if you cannot locate a tool in the specific section, please look at other sections.

Wizards make complex tasks simple. Some of these wizards span multiple sections, which means that they could bring records from the User Management, Learning, or Performance sections into one place and in a workflow that allows you to complete complex tasks.

12.1 Purchasing Assistant

View this section if you want to know about the Purchasing Assistant wizard for Commerce.

The Purchasing Assistant wizard is used to facilitate purchases of items and/or scheduled offerings in the system. You can purchase by using the catalog or the shopping cart methods. In both methods, you may pay using the Chargeback or Credit Card options.

12.1.1 Purchasing Assistant Fields

View this section if you want to know about Purchasing Assistant fields.

Table 12:

This field...	...Is Used as Follows
Subject Area ID	The ID of a predefined category of subjects/discipline.
Description	A brief description of the corresponding subject area in the catalog.
Search by Title	In the catalog, you can search by the name of the Item or the name of the Subject Area.

12.1.2 Catalog Transactions

View this section if you want to know how to make Catalog transactions.

Context

Follow these steps to make a Catalog transaction.

Procedure

1. Navigate *Commerce* › *Tools* › *Purchasing Assistant* .
2. Type the Shopping Account ID you want to use for the purchase or use the search page to select one from a list.
3. Click *Catalog*
4. Type your Catalog search criteria, and then click *Search*.
5. Find the Item Title and then click the corresponding *Add to Cart* button.
6. If you like, change the quantity and click *Update Quantities*.
7. Click *Checkout*.
8. If you are using the Chargeback method of payment, click the *Chargeback* option button. Click *Continue*. Review or change the shipping information and click *Continue* or *Place Order*. The Order Confirmation page appears. It is the receipt for the order.
9. If you are using a credit card, click the *Credit Card* option button. Click *Continue*.
10. Type the Name On Card, Card Type (VISA, Mastercard, or American Express), Card Number, Expiration Month (numeric), Expiration Year (numeric), and Security Code (optional). Click *Continue*.
11. Type the Billing Address.
12. Review the information and click *Place Order*.

12.1.2.1 Performing a Catalog Transaction When the Approval Process is Used

View this section if you want to know how to perform a Catalog transaction when using the approval process.

Context

This transaction happens when the user is an internal user, he or she is buying a scheduled offering, AND, the approval process is associated with the registration of the item.

Procedure

1. Navigate *Commerce* > *Tools* > *Purchasing Assistant*.
2. Type the Shopping Account ID you want to use for the purchase or use the search page to select the shopping account information.
3. Click *Catalog*.
4. Type your Catalog search criteria and click *Search*.
5. Find the Item Title.
6. Click the corresponding *Add to Cart* button.
7. If there are still approvers to be assigned, you will see the *Add Missing Approvers* link. You cannot proceed until you have clicked the link and added approvers to the process because the system requires that the learning item be approved. .
8. Click *Checkout*.
9. If you want to proceed, click *Yes*.
10. Review the information and click *Place Order*.

    The Order Confirmation page appears. This is your receipt. You can view your order at any time by selecting *Order Management* on the left menu.

12.1.3 Shopping Cart Transactions

View this section if you want to know how to make Shopping Cart transactions.

Context

Follow these steps to make a Shopping Cart transaction.

Procedure

1. Navigate *Commerce* > *Tools* > *Purchasing Assistant*.
2. Type the Shopping Account ID you want to use for the purchase or use the search page to select one from a list.
3. Click the *Shopping Cart* button.
4. Change the Quantity as needed and then click the *Update Quantities* button.
5. Click *Checkout*.
6. If you are using the Chargeback method of payment, click the *Chargeback* option button. Click *Continue*. Review the information and click *Place Order* to display the Order Confirmation page.
7. If you are using a credit card, click the *Credit Card* option button. Click *Continue*.

8. Type the Name On Card, Card Type (VISA, Mastercard, or American Express), Card Number, Expiration Month (numeric), Expiration Year (numeric), and Security Code (optional). Click *Continue*.
9. Type the Billing Address.
10. Review the information and then click *Place Order*.

12.2 Chargeback Adjustment

View this section if you want to know how to make a Chargeback adjustment.

The Chargeback Adjustment wizard *Commerce* > *Tools* > *Chargeback Adjustment* reconciles chargeback transactions after the closure of a scheduled offering. It credits the related cost centers and credit profit centers of the selected scheduled offering. A scheduled offering cannot be closed with an open segment.

12.2.1 Chargeback Adjustment Fields

View this section if you want to know about Chargeback Adjustment fields.

Table 13:

This field...	...Is Used as Follows
Scheduled Offering	A specific scheduled event of an item; such as "the HR101 class scheduled for October 15 in Room 320 at the Main Office," for which a database record is created in the *Scheduled Offerings* section. Two types of events can be scheduled in an offering: items and activities.
Order ID	The unique ID of the order for the selected scheduled offering.
Price Paid	The amount of money paid for the selected scheduled offering.
Cost Center Accounts	The account code that is being debited for the purchase of the selected scheduled offering.
Profit Center Accounts	The account code credited for the purchase of the selected scheduled offering.
Payment Order Ticket	The order ticket to use by the user to pay for the selected scheduled offering.
Number of Seats	The number of seats ordered by the corresponding organization of the selected scheduled offering.

Note

In *System Admin* > *Configuration* > *System Configuration* > *FINANCIAL*, the following configuration enables a user to register for a scheduled offering that is not free without entering an Order Ticket number if their organization has an unused slot. The available options are false or true (default).

Sample Code

```
requireOrderTicketWhenSlotAvailable=false
```

12.2.2 Chargeback Basics

View this section if you want to know how to perform a chargeback.

Context

Procedure

1. Navigate *Commerce* > *Tools* > *Chargeback Adjustment*.
2. Select the scheduled offering for which you want to adjust the chargeback, click *Next*.
3. Edit the Chargeback Data for the selected scheduled offering, click *Next*.
4. Review the Chargeback Summary and click *Finish*.

   The system will prompt you that the selected scheduled offering chargeback has been adjusted.

12.2.3 Updating User Chargeback Data

View this section if you want to know how to update user chargeback data.

Context

Procedure

1. Navigate *Commerce* > *Tools* > *Chargeback Adjustment*.
2. Select the scheduled offering for which you want to adjust the chargeback and then click *Next*.
3. On the Edit Scheduled Offering Chargeback Data page, go to the Update User Chargeback Data section.
   - To change the Price Paid for the selected scheduled offering, edit the corresponding amount and click *Next*.
   - To edit Cost Centers for the selected scheduled offering, click the corresponding *Edit* link in the Cost Center Accounts column and then click *Next*.
   - To edit Profit Centers for the selected scheduled offering, click the corresponding *Edit* link in the Profit Center Accounts column and then click *Next*.
   - If an order ticket is required, type the corresponding Payment Order Ticket.

4. Review the Chargeback Summary and click *Finish*.

   The system will prompt you that the selected scheduled offering chargeback has been adjusted.

12.2.4 Editing the Scheduled Offering Cost Center Accounts

View this section if you want to know how to edit Scheduled Offering Cost Center accounts.

Context

Procedure

1. Navigate *Commerce* > *Tools* > *Chargeback Adjustment*.
2. Select the scheduled offering for which you want to adjust the chargeback and then click *Next*.
3. On the Edit Scheduled Offering Chargeback Data page, go to the Update User Chargeback Data section.
4. To edit Cost Centers for the selected scheduled offering, click *Edit* in the Cost Center Accounts column.
5. You can add new account codes to the selected scheduled offering, remove an account code, and/or revise the distribution of selected account codes.
6. Click *Apply Changes*.
7. Click *Finish* to return to the return to the Edit Scheduled Offering Chargeback Data page.
8. 8.Click *Next* to review the Chargeback Summary.
9. Click *Finish*.

   The system will prompt you that the selected scheduled offering chargeback has been adjusted.

12.2.5 Editing the Scheduled Offering Profit Center Accounts

View this section if you want to know how to edit Scheduled Offering Profit Center accounts.

Context

Procedure

1. Navigate *Commerce* > *Tools* > *Chargeback Adjustment*.
2. Select the scheduled offering for which you want to adjust the chargeback and then click *Next*.
3. On the Edit Scheduled Offering Chargeback Data page, go to the Update User Chargeback Data section.
4. To edit Cost Centers for the selected scheduled offering, click *Edit* in the Profit Center Accounts column.
5. You can add new account codes to the selected scheduled offering, remove an account code, and/or revise the distribution of selected account codes.
6. Click *Apply Changes*.
7. Click *Finish* to return to the return to the Edit Scheduled Offering Chargeback Data page.
8. Click *Next* to review the Chargeback Summary.
9. Click *Finish*.

   The system will prompt you that the selected scheduled offering chargeback has been adjusted.

12.2.6 Updating the Organization Chargeback Data

View this section if you want to know how to update organization chargeback data.

Context

Procedure

1. Navigate *Commerce* > *Tools* > *Chargeback Adjustment*.
2. Select the scheduled offering for which you want to adjust the chargeback and click *Next*.
3. On the Edit Scheduled Offering Chargeback Data page, go to the Update Organization Chargeback Data module.
   - To change the Price Paid for the selected scheduled offering, edit the corresponding amount and then click *Next*.
   - To edit Cost Centers for the selected scheduled offering, click *Edit* in the Cost Center Accounts column and then click *Next*.
   - To edit Profit Centers for the selected scheduled offering, click *Edit* in the Profit Center Accounts column and then click *Next*.
   - To change the Number of Seats, edit the number of seats and click *Next*.
4. Review the Chargeback Summary and then click *Finish*.

   The system will prompt you that the selected scheduled offering chargeback has been adjusted.

12.3 Catalog Price Change

View this section if you want to know about the *Catalog Price Change* wizard.

The *Catalog Price Change* wizard (*Commerce* > *Tools* > *Catalog Price Change*) is used to change the price of an item and/or scheduled offering in the catalog including pending and submitted items.

12.3.1 Catalog Price Change Fields

View this section if you want to know about Catalog Price Change fields.

Table 14:

This field...	...Is Used as Follows
New Price	Enter the price you wish to replace the old price with.
Item	This information includes the Type, ID and Revision Date and Time of the item/material. It also gives the ID, Date, and Time as well as the facility and default price of the schedules of the corresponding item.
Default/Old Price	The price of the selected item before the price change.

12.3.2 Using the Catalog Price Change Wizard

View this section if you want to know how to use the *Catalog Price Change* wizard.

Context

Procedure

1. Navigate *Commerce* > *Tools* > *Catalog Price Change*
2. Type a SKU or use the search page to select one from a list and then click *Next*.
3. Select the item or scheduled offering you want the price change to affect and then click *Next*.
4. Change the price of the selected scheduled offering and/or items/materials.
5. Select the orders of the selected item/material that you want the price change to affect and then click *Next*.

6. The system displays a Summary of the price change. Click *Finish*.

   The system prompts you that the price change was successful.

12.4 Master Inventory Price Change

View this section if you want to know about the *Master Inventory Price Change* wizard.

The Master Inventory (*Commerce* > *Tools* > *Master Inventory Price Change*) stores all the items and scheduled offerings in your system. Catalogs are populated from the master inventory. The *Master Inventory Price Change* wizard changes the price of an item or scheduled offering in the Master Inventory. You can also choose to have the price change propagated to related catalogs.

12.4.1 Master Inventory Price Change Fields

View this section if you want to know about Master Inventory Price Change fields.

Table 15:

This field...	...Is Used as Follows
New Price	The price to replace the old price that is being changed.
Apply Price Change to Catalog	This check box, when selected, allows you to select from cata-log that is affected by the price change.
Item	This information includes the Type, ID, and Revision Date and Time of the item/material. It also gives the ID, Date, and Time of schedules of the corresponding item.
Price	The current price of the item.

12.4.2 Using the Master Inventory Price Change Wizard

View this section if you want to know how to use the *Master Inventory Price Change* wizard.

Context

Procedure

1. Navigate *Commerce* > *Tools* > *Master Inventory Price Change*
2. Type a SKU or use the search page to select one from a list. Click *Next*.
3. Type the New Price of the item and select the related scheduled offerings of the item you want the price change to affect where applicable. To apply the New Price to catalogs with the selected item/material, click the *Apply price change to catalogs* check box. Click *Next*.
4. Select the catalogs to be affected by the price change. Click *Next*.
5. Select the orders of the selected item/material that you want the price change to affect. Click *Next*.
6. The system displays a Summary of the price change. Click *Finish*.

   The system prompts you that the price change was successful.

13 Overview of SAP SuccessFactors Learning Approval Processes

Create learning approval processes when you want users' actions to require approval in SAP SuccessFactors Learning.

You can use the SAP SuccessFactors Learning approval process framework for many different actions. For example, you might require that users seek approval to enroll in a course or to create an account to SAP SuccessFactors Learning.

Any approval process in SAP SuccessFactors Learning is composed of the following elements:

- Approval Roles, which define a type of person who can grant approval. For example, you can create a role called Human Resources Business Partner (HRBP) and assign users to the role. In an approval process, the HRBP role can be a step in the approval process.
- Approval Processes, which define the order of the approval roles or the particular users. You can define a process for enrollment, for example, that first goes to the employees' supervisors (a role) and then goes to an HRBP role. You can add users or roles to the steps.

For any action that requires approval, there are usually these components to set up the approval process:

- Enable the approval process. For example, you can enable the approval process for enrollment into a learning item by enabling approval on the learning item.
- Associating the approval process with the individual object. For example, associating a particular approval process with a particular learning item.
- Setting a default, or fall-back process if none can be associated with the object. For example, if a user cannot be associated with an account approval process, the system falls back on the default.

14 Creating Approval Processes

Create an approval process to require that users seek approval for requests.

Prerequisites

Configure the global behavior of your approval processes in *System Admin* > *Configuration* > *Global Variables* > *Approval Process Settings*.

If your approval process will use custom roles, create the custom roles. Creating Custom Approval Roles [page 51]

Context

In many places in SAP SuccessFactors Learning, you might want users to seek approval for something. For example, you might want users to seek approval to enroll or withdraw from a course. You set up an approval process to define how the user must seek the approval.

Procedure

1. Go to *References* > *System Admin* > *Approval Processes* and click *Add New*
2. Complete the basic information of the approval process and click *Next*.

   The system prompts you to add your first approval step.
3. In *Step Name*, type a step name to describe the first step of the approval process.

   Step names are visible to the user and localizable (translatable). For example, if the first step in an approval is for the supervisor to approve the request, the name could be "Supervisor Approval".
4. Add an approval role or a user to the approval step.
   - In most cases, you want to add an approval role. An approval role is an alias for an actual user. For example, the approval role of Supervisor Level 1 dynamically routes the employee's approval request to his or her own supervisor. Add the approval role in the *Approval Role ID* box.
   - In some cases, you want to add a particular user. For example, if you are a small company with a small external site and you want all site login requests to go to the same user, you can provide that user's ID in the *User ID* box.
5. For each additional step in the process click *Next Step* and repeat the actions of adding a step name and approver.
6. When you are finished adding steps, click *Finish*.

Next Steps

Assign the approval process to the default processes in global variables, to particular learning items or through an assignment profile.

Related Information

[Creating Custom Approval Roles [page 51]]
[Setting an Approval Process for Withdrawing from Courses [page 55]]
[Setting an Approval Process for Enrolling into a Course [page 54]]
[Advice for Creating Approval Processes for Self-Registration [page 58]]

14.1 Creating Custom Approval Roles

Create custom approval roles if you cannot use the default approval role.

Prerequisites

Create a domain or organization structure that matches your company, including the hierarchy of organizations or domains. Assign users into the organizations or domains.

Configure the global behavior of your approval processes in *System Admin* > *Configuration* > *Global Variables* > *Approval Process Settings*.

Procedure

1. Go to *References* > *System Admin* > *Approval Roles* and click *Add New* for each approval role you want to create.

   For example, you might create an approval role called "Training Manager" for each organization. Requests for training within that organization (where organization is the control entity) go through a user in the training manager role and who is controlling that organization.
2. For each user that you want to assign to the role, go to *Users* > *Users* > *Approval Role*.
3. Click *add one or more from list* and then find the approval role you added, select it, and assign it to the user.
4. Click *Control Domains* or *Control Organizations* to add the domains or organizations whose employees this user approves for.

If you selected domains as your control entity, you see the *Control Domains* link. If you selected organizations as your control entity, you see *Control Organizations*.

You must add at least one control entity and you can add many control entities to the user. You do not need complete coverage for all domains or organizations because the system falls back to the default processes if you do not add a requester's organization or domain to an approval role and user.

Next Steps

Assign the approval role to an approval process.

Related Information

Advice for Creating Approval Processes for Self-Registration [page 58]

14.2 Default Approval Roles vs Custom Approval Roles

Before you create an approval process, decide if you need custom approval roles or if you can use the default approval roles.

When possible, use the default approval roles. When you use default approval roles, you need less configuration of your system, including a less strict domain or organization structure. Use custom approval roles if you have a strict organization or domain structure and you cannot use the default approval roles.

Default Approval Roles

SAP SuccessFactors Learning installs with several default approval roles. We recommend that you use default approval roles when possible to simplify your configuration. When you include one of these roles in your approval process, you do not need additional configuration:

- Employee: The employee himself or herself. You might have an approval process for the employees to acknowledge enrollment requests before they are forwarded to supervisors.
- Supervisor Level 1: The person in this role is always the employees' immediate supervisor.
- Supervisor Level 2: The person in this role is the second level supervisor (the employees' supervisors' supervisor).
- Instructor: The instructor of the course that the user wants to enroll into or withdraw out of (for example).

Custom Approval Roles

Custom approval roles require additional configuration so that the system knows where to route the approval. Users inhabit custom approval roles at run time under the following conditions:

- A user makes a request and the request is associated with an approval process. For example, a user requests to enroll into a learning item, and that learning item has an enrollment approval process.
- The approval process has an approval role that the user belongs to. For example, a learner requests to enroll into an IT Training course, and the approval process for that learning item includes an approval role called “IT Training Approvers”. If a user is in that “IT Training Approvers” role, he or she can be an approver.
- The learner seeking approval is a member of the domain or organization that the user in the approval role controls.
  For example, two users can both be in the “IT Approvers” role, but controlling two different organizations, like SALES and FINANCE. Learners from the sales organization who request approval are routed to the person who controls SALES approvals and learners from the finance organization who request approval are routed to the person who controls FINANCE approvals.

15 Applying Approval Processes

15.1 Setting an Approval Process for Enrolling into a Course

Set an approval process for enrolling into courses if you want users to seek approval before they are allowed to enroll.

Prerequisites

Create at least one approval process. Creating Approval Processes [page 50]. You usually create approval processes during implementation or when you review your implementation, so chances are that this is already done for you.

Check your registration settings. You usually configure your registration settings during implementation or when you review your implementation, so chances are that your registration settings are as you want them.

Procedure

1. Go to *Learning* > *Items*, search for the learning item that you want to add the enrollment approval process to, and open it.
2. Click *View All*.
3. Find *Approval Required* and set it to *Yes*.
4. Find *Approval Process* and set it to the enrollment approval process that you want to associate with course.

   All instances of this course (scheduled offerings) associated with this learning item inherit the settings. You can break the inheritance in the scheduled offering record.

Related Information

Breaking the Approval Inheritance from Item to Scheduled Offering [page 57]
Setting an Approval Process for Withdrawing from Courses [page 55]

15.2 Setting an Approval Process for Withdrawing from Courses

Set an approval process for withdrawing from courses if you want users to seek approval before they are allowed to unenroll.

Prerequisites

Create at least one approval process. Creating Approval Processes [page 50]. You usually create approval processes during implementation or when you review your implementation, so chances are that this is already done for you.

Check your registration settings. You usually configure your registration settings during implementation or when you review your implementation, so chances are that your registration settings are as you want them.

Context

If you have enrolled users into a course, you might want them to seek approval before they withdraw from it. For example, if you have paid for them to attend the course, and if you will lose your payment if they withdraw, you might ask them to seek approval to withdraw.

Procedure

1. Go to *Learning* > *Items*, search for the learning item that you want to add the withdraw approval process to, and open it.
2. Click *View All*.
3. Find *Withdraw Approval Required* and set it to *Yes*.
4. Find *Withdraw Approval Process* and set it to the withdraw approval process that you want to associate with course.

   All instances of this course (scheduled offerings) associated with this learning item inherit the settings. You can break the inheritance in the scheduled offering record.

Related Information

Creating Approval Processes [page 50]
Setting an Approval Process for Enrolling into a Course [page 54]
Breaking the Approval Inheritance from Item to Scheduled Offering [page 57]

15.2.1 Course Withdraw Approval

Administrators can require an approval process to withdraw from a couse.

Withdraw approval requires a user to seek approval before withdrawing from a course (a scheduled offering). Withdraw approval uses the standard approval process framework. It applies to enrolled or waitlisted users. If users are pending approval for enrollment and withdraws, the withdraw approval process is not initiated.

When an enrolled or waitlisted user attempts to withdraw from a scheduled offering that requires withdraw approval, the user sees that approval is required to withdraw and sees a refund amount, if applicable. If users see that approval is required and decide to remain enrolled, they can cancel their withdraw request as long as they have not submitted it.

If users sumbit their requests to withdraw, the users remain enrolled until the approval process completes. The impact on the roster is as follows:

- The seat remains reserved (occupied) by the user who has requested the withdraw until the approval process completes.
- The status of the user in the roster is *Pending Withdraw Approval*. the user sees the status in the *My Learning Assignments* tile, in the item details, registration page, and catalog course dates list.
- If approval honor cut-off date is enabled and the approval is **not** completed before registration cut-off, the approval will not be visible to the approver and user remains enrolled.
- If the approval is *not* timely, the refund amount may vary from amount displayed to the user.

If users' withdraw requests are approved, the user is withdrawn and refunds are processed according to the cancellation policy on the date of approval. If the withdraw requests are denied, users remain enrolled in the scheduled offering.

Related Information

How Withdraw Approval is Initiated [page 56]
Setting an Approval Process for Withdrawing from Courses [page 55]

15.2.2 How Withdraw Approval is Initiated

The withdraw approval process can be initiated from multiple places and by different roles.

Users can initiate the withdraw approval process when they withdraw from a course at any place in the application (for example, from the details page).

Supervisors can initiate the withdraw process when they withdraw a user from the *My Employees* pages.

If supervisors or administrators withdraw users in bulk using, for example, *My Employees* > *Supervisor Links* > *Withdraw Employees*, the withdraw process is **not** initiated.

Related Information

Course Withdraw Approval [page 56]

15.3 Breaking the Approval Inheritance from Item to Scheduled Offering

If you do not want the instance of a course (a scheduled offering) to inherit its approval process configuration from the default configuration of the course (learning item), you can break the inheritance.

Procedure

1. Go to *Learning* > *Scheduled Offerings*, search for the scheduled offering that you want to break inheritance for, and then open it.
2. Click *View All*.
    - If you want to turn on or turn off the enrollment approval, find *Approval Required* and set it.
    - If you want to turn on or turn off the withdraw approval, find *Withdraw Approval Required* and set it.
    - If you want to change the approval process required for enrollment, find *Approval Process* and set it.
    - If you want to change the approval process for withdrawing, find *Withdraw Approval Process* and set it.

Related Information

Setting an Approval Process for Withdrawing from Courses [page 55]
Setting an Approval Process for Enrolling into a Course [page 54]

15.4 Account Self-Registration Approval

You can insert an approval process between users requesting an account for SAP SuccessFactors Learning and their access to the system.

In some configurations, users can create their own SAP SuccessFactors Learning. For example, learning administrators can tell to external partners to go to a URL and register themselves for the Learning Management System. When the partners arrive at the site URL, they see a button that allows them to create an account.

In most cases, you want to require an approval for the account so that you can monitor who is creating accounts to your sites (or your internal LMS). The approval process can, for example, route the approval to a learning administrator for approval. When the learning administrator grants permission to enter the system, the user can log in.

The approval process for self-registration uses the standard approval process framework, and it works as follows:

1. When a user completes the self registration form, in either the native SAP SuccessFactors Learning environment or in Sites, and submits the registration form, the process begins.
2. When the Set Account Request Approval Process Automatic Process Manager (APM) runs, it matches pending user requests with an approval process.
    - The APM can match users through an assignment profile that you have created. For example, if the users are in North America, they might follow one process (assigned through an assignment profile) and if the users are in Europe, the users might follow a different process.
    - If the system cannot find an assignment profile to match users to an approval process, it falls back to the default assignment profile, set in *System Admin* > *Configuration* > *Global Variables* > *Approval Process Settings*. Assignment profiles are optional. If you would like all users to use the same approval process, you can set a default process and ignore assignment profiles.
    - If the system finds two assignment profiles that match the user to two different approval process, the last one found is assigned. You cannot control which process runs last, so please design your assignment profiles to be mutually exclusive. Do not design assignment profiles where two different assignment profiles can match the same user.
3. At the end of the approval process, the user is notified that the account request is approved or denied.
    - If the user is approved, an active user is created in the system and the user receives an email with login instructions.
    - If the user is denied, they receive an email that their request is denied.
4. To send reminders to approvers who have not yet approved pending requests, schedule the User-Created Account Reminder APM. This step is optional but recommended.

Related Information

Creating Approval Processes [page 50]
Self-Registration Approval Notes [page 64]
Approving Account Requests as an Administrator [page 63]
Creating Self-Registration Approval for Sites [page 60]
Creating Self-Registration Approval for Native Users [page 59]

15.4.1 Advice for Creating Approval Processes for Self-Registration

When creating an approval process for self-registration, consider that the approvals are for users who are not yet in the system.

We recommend the following when you are creating an approval process for use with self-registration:

- Do **not** use default approval roles like Supervisor Level 1 or Employee. Because the person seeking approval is not yet an active user in the system, he or she does not have the relationships (like a supervisor relationship) that the default approval roles require. Instead, use custom approval roles.

- Do **not** use approval processes for learning sites if you send external users to SAP SuccessFactors suite.
- When creating self-registration approval processes for sites, assign the site a default organization and a default domain. Custom roles require that an approver be a member of a domain or organization and a person seeking approval for a site will be originally assigned to the Site's default domain and organization. You choose domains or organizations in global variables.
- When creating self-registration approval processes for the native application, be sure that your approval roles use the PUBLIC domain. Users who are pending are in the PUBLIC domain until they are active in the system (when the domain can be changed). In native self-registration approval processes, approval roles **cannot** use organizations as their control entity. You set the control entity in *System Admin* > *Global Variables* > *Approval Process Settings* > *Control Entity for Approval Role*.
- If you cannot use custom approval roles, then directly assigning a user in all approval steps in your approval process. You might also create the understanding that the user tries to keep up with all self-registration, but that administrators assist through *Users* > *Account Requests*.

Related Information

Default Approval Roles vs Custom Approval Roles [page 52]
Creating Self-Registration Approval for Sites [page 60]
Creating Self-Registration Approval for Native Users [page 59]
Creating Approval Processes [page 50]

15.4.2 Creating Self-Registration Approval for Native Users

Create a self-registration approval process for native users when you want users who register for your native environment (as opposed to Sites) to be approved before they can log in.

Prerequisites

Create at least one approval process. Creating Approval Processes [page 50]. Advice for Creating Approval Processes for Self-Registration [page 58]

Configure the global behavior of your approval processes in *System Admin* > *Configuration* > *Global Variables* > *Approval Process Settings*.

Procedure

1. Go to *System Admin* > *Configuration* > *User-Created Account*.
2. Select both *Allow Users to create a new account at SuccessFactors Learning login page* and *Approval Required*.

3. Complete the rest of the information in *System Admin* > *Configuration* > *User-Created Account* to assist users in registering.

   Consider writing something about your approval process in *Instructional Text*. For example, you could type **`Registration requests require approval. You will receive a notification at the end of the approval process. If you are approved, you receive an email with instructions about logging in.`**. If you decide to provide instructional text, consider writing it in every language of your native users because the text box is not internationalized.

Next Steps

Optionally, you can create an assignment profile to route approval processes by user attributes (from the request form). This step is optional and recommended only if you need it. To keep your registration process simple, use the default approval process setting in *System Admin* > *Configuration* > *Global Variables* > *Approval Process Settings*. When you use the default process only, all users who self-register from any site or the native application use the same process.

Configure the Set Account Request Approval Process Automatic Process Manager (APM) to associate approval processes with pending user-created account requests. Go to *System Admin* > *Automatic Processes* > *Set Account Request Approval Process*.

Optionally, configure the User Created Account Reminders Automatic Process Manager (APM). This APM sends notifications to remind approvers of pending approvals. Go to *System Admin* > *Automatic Processes* > *User Created Account Reminders*

Related Information

Creating Self-Registration Approval Processes with Assignment Profiles [page 62]

15.4.3 Creating Self-Registration Approval for Sites

Create a self-registration approval process for Sites when you want users who register for external sites to be approved before they can log in.

Prerequisites

> **Restriction**
>
> You cannot use *Approval Process* if you are integrating your sites to the larger SAP SuccessFactors suite (for access to other modules like SAP Jam). Instead, use Registration Codes or make the site public.

Create at least one approval process. Creating Approval Processes [page 50]. Advice for Creating Approval Processes for Self-Registration [page 58]

Configure the global behavior of your approval processes in *System Admin* > *Configuration* > *Global Variables* > *Approval Process Settings*.

Create at least one site in *System Admin* > *Application Admin* > *Sites*.

Procedure

1. Go to SAP SuccessFactors Learning administration, and then go to *System Admin* > *Application Admin* > *Sites*, search for the Site that should have the approval process, and edit it.
2. In *Summary*, select *Approval Process* in *Registration Validation*.

   Restriction

   You cannot use both registration codes and approval processes for registration validation.
3. In *Summary*, set a default domain and organization in *Default Domain ID* and *Default Organization ID*.

   You set the default domain and organization so that custom approval roles can work properly. Custom approval roles depend on either domains or organizations to route approves to the correct person within the role.

   For example, two users can both be in the “IT Approvers” role, but controlling two different organizations, like SALES and FINANCE. Learners from the sales organization who request approval are routed to the person who controls SALES approvals and learners from the finance organization who request approval are routed to the person who controls FINANCE approvals.
4. Save and close the Site.

Next Steps

Optionally, you can create an assignment profile to route approval processes by user attributes (from the request form). This step is optional and recommended only if you need it. To keep your registration process simple, use the default approval process setting in *System Admin* > *Configuration* > *Global Variables* > *Approval Process Settings*. When you use the default process only, all users who self-register from any site or the native application use the same process.

Configure the Set Account Request Approval Process Automatic Process Manager (APM) to associate approval processes with pending user-created account requests. Go to *System Admin* > *Automatic Processes* > *Set Account Request Approval Process*.

Optionally, configure the User Created Account Reminders Automatic Process Manager (APM). This APM sends notifications to remind approvers of pending approvals. Go to *System Admin* > *Automatic Processes* > *User Created Account Reminders*

Related Information

Approving Account Requests as an Administrator [page 63]
Self-Registration Approval Notes [page 64]
Account Self-Registration Approval [page 57]
Default Approval Roles vs Custom Approval Roles [page 52]

15.4.4 Creating Self-Registration Approval Processes with Assignment Profiles

Create self-registration approval processes with assignment profiles when you want users who request access to SAP SuccessFactors Learning to use more than one approval process.

Prerequisites

Create an approval process. Creating Approval Processes [page 50] Advice for Creating Approval Processes for Self-Registration [page 58]

If you want to use assignment profiles for site registration processes, create a self-registration approval process for sites. Creating Self-Registration Approval for Sites [page 60]

If you want to use assignment profiles for native user registration processes, create a native self-registration approval process. Creating Self-Registration Approval for Native Users [page 59]

Create an assignment profile.

Context

This is optional. A simpler configuration of self-registration approval processes is to funnel all requests for approval to a single process.

Procedure

1. Go to *Users* > *Assignment Profiles*, find the assignment profile that you created to pool your users for the approval process.
2. Go to *User-Created Account*.
3. In *User-Created Account Process ID*, select the approval process that should be applied to the users in the assignment profile.

Next Steps

Configure the Set Account Request Approval Process Automatic Process Manager (APM) to associate approval processes with pending user-created account requests. Go to *System Admin* > *Automatic Processes* > *Set Account Request Approval Process*.

Optionally, configure the User Created Account Reminders Automatic Process Manager (APM). This APM sends notifications to remind approvers of pending approvals. Go to *System Admin* > *Automatic Processes* > *User Created Account Reminders*

Related Information

Approving Account Requests as an Administrator [page 63]
Creating Self-Registration Approval for Sites [page 60]
Creating Self-Registration Approval for Native Users [page 59]

15.4.5 Approving Account Requests as an Administrator

As an administrator, you can approve account requests that are stuck in the approval process.

Context

You can require people who request SAP SuccessFactors Learning accounts to go through an approval process. If the process stalls at an approval step, you can step in as an administrator to approve the requests and grant access to the users.

Procedure

1. Go to *Users* > *Account Requests* and search for the user requesting the account.
2. Click *Registration Data* to see the form that the user completed to request the account and to make sure that you are approving the correct request by the correct user.
3. When you find the correct user, click *Edit Approval*.

   The *Edit User Approvals* page shows the separate steps of the approval. You can approve a single step or all steps in the process. In many cases, you need only to approve a single step. For example, if the person responsible for one step is on vacation or leave, but the people responsible for later steps are still present, then you can approve the step blocked by the employee on vacation or leave. The process continues to later approvers as if the person on vacation or leave approved the step.
4. Approve or deny the relevant steps in the process with the *Approve* or *Deny* buttons.

   > Tip
   >
   > Type comments in the *Comments* box for the audit trail. For example, you could type "Approver is on leave, but spoke to her supervisor. Supervisor said to approve".
5. Click *Apply Changes*.

Next Steps

If you must approve many of these, consider rethinking your approval process for user-created accounts. You can revisit any of these steps:

- You can change how users are associated with approval processes in *Users* > *Assignment Profiles* > *User-Created Accounts*.
- You can change the reminder frequency to remind approvers of pending approvals more often or for longer periods. Go to *System Admin* > *Automatic Processes* > *User Created Account Reminders*.
- You can edit the approval processes to simplify them. Go to *References* > *System Admin* > *Approval Processes*.

15.4.6 Self-Registration Approval Notes

The approval process to register for a SAP SuccessFactors Learning account has unique behavior.

- Account requests are not stored in the same location as active users until the account request is approved.
- Any place where users are added (connectors, data import, or the administration environment) applies its validation rules to both the active users and users pending approval. For example, if you attempt to add a user with the user name jdoe, the system checks the uniqueness of the user ID in both existing, active users and also in the list of pending user requests. If it finds jdoe in either place, you see a validation warning telling you that the user ID must be unique.
- Users receive notification both when the account request is approved and when it is denied. The self-registration email is suppressed.

- Approvers in self-registration approval process see the registration form so that they can check the user making the request. The default form contains contact information, so the approver can contact the requester if necessary.
- Administrators can unblock self-registration processes in *Users* > *Account Requests*.

Related Information

Account Self-Registration Approval [page 57]
Approving Account Requests as an Administrator [page 63]
Creating Self-Registration Approval for Sites [page 60]
Creating Self-Registration Approval for Native Users [page 59]
Creating Self-Registration Approval Processes with Assignment Profiles [page 62]

15.5 Adding Primary E-Signatures Approval Processes for Learning Events

If you your courses lead to compliance through a regulator who audits your system, you might need e-signatures for extra identity verification when your employees post learning results.

Prerequisites

Enable electronic signatures (e-signatures) in *System Admin* > *Configuration* > *Global Variables*. You enable e-signatures as part of your implementation process, at the security stage, which is your implementation process initial phase. As part of your e-signature implementation, you probably configured a default approval process for e-signature events.

If you want this completion status to have a different approval process, then create it in *References* > *System Admin* > *Approval Process*.

Finally, your e-signature completion status usually fits into a larger credit system. Consult your plans for offering credit to your users.

Context

Some customers are regulated for compliance. Compliance applies to regulated industries, like life sciences. An auditor can look through a company's training records to check that employees have been properly certified for their jobs. If an employee is not certified, then the regulator can fine the company. Companies in this situation want to avoid mistakes or fraud when their employees post learning results.

Procedure

1. Log in to SAP SuccessFactors Learning administration and then go to *References* > *Learning* > *Completion Status*.
2. Open each completion status that requires additional identity verification.
3. Select *Enable electronic signature*.
4. To change the approval process, select it in *Approval Process*.

   You set the default approval process for e-signatures in *System Admin* > *Configuration* > *Global Variables*.
5. Click *Apply Changes*.

Related Information

Creating Approval Processes [page 50]
Setting Default E-Signatures Approval Process Behavior [page 66]
How SAP SuccessFactors Learning Uses E-Signatures [page 72]

15.5.1 Setting Default E-Signatures Approval Process Behavior

Set the default e-signature approval process so that when other administrators create completion statuses that require an e-signature and approval, the completion status is defaulted to your selected approval process.

Prerequisites

Create the approval processes for your e-signatures.

Although it is not required for this process, you should also create e-signature meaning codes before you set the default approval processes.

Context

You can set a primary approval process for a completion status, but you can also set secondary processes

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to *System Admin* > *Configuration* > *Global Variables*.
2. In *Completion Status additional Approval Process ID*, select the default approval process for new completion statuses.
3. Set *Enable electronic signatures for External Events*.
   - True: When users run the record learning event wizards,SAP SuccessFactors Learning forces the users to enter electronic signatures for external events. External events are courses that a user completed that were are not tracked as learning items inside SAP SuccessFactors Learning.
   - False: SAP SuccessFactors Learning automatically verifies all unverified external learning events that require an electronic signature.
4. If you set *Enable electronic signatures for External Events* to true, select a default process for external events in *External Event additional Approval Process ID*.
5. Set *Skip Additional Approval Process steps that do not have approvers*.
   - True: SAP SuccessFactors Learning skips any steps that require an additional approval process if those steps do not have approvers. For example, when you record a learning event, the system checks the learning record to see if the instructor has an associated user ID. If the instructor does not have an associated user ID, then the system automatically approves the step and skips to the next one.
   - False: SAP SuccessFactors Learning prevents any user from completing the e-signature if there are approvers missing from the approval process. Most likely, an end user can resolve this independently; for example, if the process requires a supervisor's e-signature and the user does not have a supervisor, then the only way to resolve the issue is to add a supervisor to the user's record or have an administrator change the associated process.

Next Steps

Consider setting the other electronic signature variables in *System Admin* > *Configuration* > *Global Variables*.

Related Information

SAP SuccessFactors Learning Electronic Signature Global Variables [page 68]
SAP SuccessFactors Learning E-Signature Meaning Code [page 68]
User Uniqueness for SAP SuccessFactors LearningSecurity [page 68]
Creating Approval Processes [page 50]

15.5.2 SAP SuccessFactors Learning E-Signature Meaning Code

E-Signature meaning codes identify the reason that a person is entering their secondary user identification (e-signature).

If you work in a regulated industry, you might use electronic signatures (e-signatures). E-Signatures verify that users are who they say they are. E-Signature **meaning codes** describe why users or administrators are typing their e-signatures. For example, you might create e-signature meaning codes for adding, updating, and deleting learning events. When users enter their e-signatures, they select one of the meaning codes that you provide.

To manage e-signature meaning codes, go to SAP SuccessFactors Learning administration and then go to *References* > *System Admin* > *Esig Meaning Code*. You set default e-signature meaning codes in *System Admin* > *Configuration* > *Global Variables*.

15.5.3 User Uniqueness for SAP SuccessFactors LearningSecurity

When identifying unique users for security purposes, SAP SuccessFactors Learning uses these methods.

When identifying unique users, SAP SuccessFactors Learning starts like other systems: each user has a unique user ID and password. The encryption of passwords is handled by an encryption scheme described in LMS_ADMIN. In addition to a simple user ID and password, the application offers the following to help administrators and users manage identity:

- e-Signitures (also known as a PIN) – e-Signatures are special codes known only to the user. The administrators cannot enter an e-signature. Instead, they can only reset the e-Signature in *Users* > *Users* > *Actions*. e-Signatures are required to uniquely identify users when they execute certain commands such as approvals.
- Merge Users – Users sometimes accumulate unique identities. They might, for example, have an old user ID from a time that they were a contractor and you might assign them a new user ID when they become a full time employee.
- Security Question – Users are asked a security question to retrieve their lost passwords.

15.5.4 SAP SuccessFactors Learning Electronic Signature Global Variables

These are the electronic signature global variables in SAP SuccessFactors Learning

You can edit electronic signature global variables in SAP SuccessFactors Learning administration by going to *System Admin* > *Configuration* > *Global Variables*.

Enabling Electronic Signatures

You must select the *Enable electronic signatures* to enable these controls.

Table 16:

This Field...	...Is Used as Follows
Enable electronic signatures	If you select this, then the system forces electronic signatures for other records (for example, items, curricula, and so on). If you clear this, then the system automatically verifies all unverified learning events that require an electronic signature.
Enable electronic signatures for External Events	If you select this, then the system forces electronic signatures for learning events that do not correspond to items in Talent Management. If you clear this, then the system automatically verifies all unverified external learning events that require an electronic signature.
External Event additional Approval Process ID	You can assign an additional approval process ID to an external learning event.
Skip Additional Approval Process steps that do not have approvers	If you select this, then the system skips any steps that require an additional approval process if those steps do not have approvers. For example, when you record a learning event, the system checks the learning record to see if the instructor has an associated user ID. If the instructor does not have an associated user ID, then the system automatically approves the step and skips to the next one. If you clear this, then the system prevents any user from completing the e-signature if there are approvers missing from the approval process. Most likely, an end user can resolve this independently; for example, if the process requires a supervisor's e-signature and the user does not have a supervisor, then the only way to resolve the issue is to add a supervisor to the user's record or have an administrator change the associated process.

Enabling Default Electronic Signatures for New Controls

You must select *Enable electronic signatures* to enable these controls.

Table 17:

This Field...	...Is Used as Follows
Item	If you select this, then the system automatically selects the Enable electronic signature check box (*Learning* *Items* *Summary*) each time you create a new item. After you create a new item, you can override this global setting by clearing the check box on the Summary tab.
Completion Status	If you select this, then the system automatically selects *Enable electronic signature* (*References* *Learning* *Completion Status*) each time you create a new completion status. After you create a new completion status, you can override this global setting by clearing the check box on the Summary tab.
Completion Status additional Approval Process ID	You can assign a default approval process to a new completion status when a majority of records require the same approval. When you select an additional approval process, the system automatically assigns it to every new completion status that you create.
Curriculum	If you select this, then the system automatically selects *Enable electronic signature* (*Learning* *Curricula* *Summary*) each time you create a new curriculum. After you create a new curriculum, you can override this global setting by clearing the check box on the Summary tab.
Competency	If you select this, then the system automatically selects *Enable electronic signature* (*Performance* *Competencies* *Summary*) each time you create a new competency. After you create a new competency, you can override this global setting by clearing the check box on the Summary tab.

Personal Identification Number (PIN) Settings

Table 18:

This Field...	...Is Used as Follows
Administrator Email	In this box, you can enter the e-mail address where you want to receive automatic notifications when a user unsuccessfully attempts to enter his or her PIN multiple times.
Enable PIN Expiration	If you select this, then the system enables the PIN Expiration feature so that PINs expire after the number of days you indicate in *PIN Expires After*.

This Field...	...Is Used as Follows
PIN Expires After	In this box, you can indicate the number of days after which you want a user's PIN to expire, requiring the user to create a new PIN. A user's PIN and password are different things. Users use their PIN number for electronic signatures, and they use a password to log on to the user interface. You can manage passwords in *Password Settings* (*System Admin* > *Configuration* > *Global Variables*).
Count Between Repeated PIN	In this box, you can indicate the number of times that a user must enter a unique PIN before he or she can reuse a PIN value. For example, if you set the count to three, then a user must select three different PIN values before he or she can reuse the first value.
Minimum PIN Change Period	In this box, you can indicate the number of days before a user can change his or her PIN. The system does not account for partial days when it counts days between PIN changes. For example, if a user changes his or her PIN at 5:00 p.m. on 01/01/2009, and you set the Minimum PIN Change Period to three, then the user may change his or her PIN at any time on 01/04/2009.

Electronic Signature Meaning Code Settings

Table 19:

This Field...	...Is Used as Follows
Administrator/User Default Esig Meaning Code	When the system prompts administrators or users for their e-signature, the e-signature meaning code defaults to what you select for either the Administrator or User Default Meaning Code. You can edit existing or create new meaning codes in *References* > *System Admin* > *Esig Meaning Code* . Meaning Code can now be localized in addition to other fields already enabled.
Administrator/User Esig Message	You can add an instructional message (for example, explaining the e-signature process) that administrators or users see when the system prompts them for their e-signature. Administrator Esig Message and User Esig Message can now be localized in addition to the other fields already enabled.

Related Information

SAP SuccessFactors Learning E-Signature Meaning Code [page 68]

15.5.5 How SAP SuccessFactors Learning Uses E-Signatures

Use e-signatures to provide a secondary identity verification if you are overseen by a regulatory organization.

E-Signatures are part of a system that ensures user uniqueness in SAP SuccessFactors Learning. They are a secondary form of identification most often used by companies that must meet compliance from an oversight body. For example, U.S. drug manufacturers are overseen by the Food and Drug Administration (FDA) in the U.S. Federal Government. If you are **not** overseen by a compliance organization, then chances are that you do not use e-signatures.

When any user posts a learning completion status, if that completion status requires e-signature approval, then SAP SuccessFactors Learning starts an approval process that requires e-signatures. For example, imagine that an administrator records a learning event for users and two things are true:

- The learning event has electronic signatures enabled (for example, the user completed a learning item, and *Learning* > *Items* > *Summary* > *Enable Electronic Signature* is set to *Yes*.
- The completion status requires an e-signature and it has a defined approval process.

In this case, the administrator is asked to provide an e-signature. If the approval process also requires the e-signature of a manager, that manager also provides his or her e-signature, and so on through a process that you define. At each stage in the process, the users must enter e-signature meaning codes to define their actions.

Related Information

Adding Primary E-Signatures Approval Processes for Learning Events [page 65]
SAP SuccessFactors Learning E-Signature Meaning Code [page 68]

15.6 Approval Process and Cut-Off Dates

When a user seeks approval after a registration cut-off date, you can hide it from approvers.

If a user requests enrollment or withdraw approver, but the registration cut-off date has already passed, you can hide the approvals from approvers. Go to *System Admin* > *Configuration* > *Registration Settings* and select *Apply Registration cut-off and Start Date to Approval Process*.

- When you hide approvals in this way, **enrollment (registration)** approvals remain pending until the *Deny Expired Approval* Automatic Process Manager (APM) runs. You can configure the APM in *System Admin* > *Automatic Processes*.
- When users look up the approvals that they sent after the cut-off date, they see them in a pending status.

- For both enrollment and withdraw approvals, you can see the approvals in the approval status report. As an administrator, you can bypass approval and add the user in *Scheduled Offering* > *Registration*

16 Change History

The following table provides a historical overview of the most important changes made to this document since its initial publication.

Date	Version	Description
May 6, 2016	1.0	Initial release

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