CONFIDENTIAL

LEARNING ADMINISTRATION TRANSITION GUIDE

Phase 1 – March 2019

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New Learning Administration Interface - Introduction

SAP SuccessFactors is planning to release a new Learning Administration interface. The new user interface replaces all Adobe Flash elements with HTML-based elements in anticipation of the announced end of browser support for Flash by the end of 2020. This document provides information about the new interface to help customers prepare in advance of its release.

The new Learning Administration interface will provide an enhanced user experience consistent with the SuccessFactors suite of products. Customers will benefit from streamlined navigation and terminology, reorganized menus and field groupings. The redesigned menu removes duplicate functions, consolidates day-to-day tools and reorganizes menu options for optimal use. The administration application has a clean, modern look and includes a work area that can be taken full screen to allow administrators to focus on the task at hand. These enhancements make performing tasks within Learning easier and more efficient.

The new Learning Administration is planned to be accessible from a dedicated tile on the platform home page. The Flash version will remain available in its current location (Learning Administration link from Admin Center) for two releases after the new application is generally available to provide Learning Administrators ample time to transition to the new interface and carry out essential change management activities.

Due to the level of effort and time required to develop the new interface and our desire to provide guidance to our customers as early as possible, we are publishing this transition guide in two phases. Phase 1 of this document contains the majority of the changes you will experience in the new interface. Phase 2 will expand to include the remainder of the terminology and layout changes.

Visit the [Customer Community blog]() to stay informed on the upcoming release of the new Learning Administration Interface. Share feedback on this guide and post questions in the comments section.

NOTE: All customer-owned and created Flash-based Learning materials (videos, etc.) are the responsibility of the customer to update and change.

CAUTION: The information contained in this document is for general guidance only. These are only visual design samples of what is under development, these are not from an actual, live environment. Detailed level field terminology shown on the images will change. These images reflect a system with all the configurations enabled.

1. Pre-requisites for Accessing the New Admin UI

A SuccessFactors user must have a platform role with Learning Administration permission and New Home Page enabled.

Note: This prerequisite goes into effect once the new UI is generally available.

2. Terminology Changes

The Learning application's terminology is being improved for clarity, consistency, and alignment across the SuccessFactors suite ensuring it is insightful, clear, approachable and optimistic. There is an impact to language packs. The Localization and Internationalization team is working with language experts to ensure the terms are effectively translated to their respective languages. Main navigation and term changes are included in Phase 1 of the transition guide. Detailed fields and settings at the entity level will be included in Phase 2 of the transition guide.

Phase 1 Terminology Changes

See Section 5 for the Main Navigation terminology changes.

LMS Area	Current Term	New Term	User Side Impact
Content	Document	Document Links	Yes, currently it is Attached Documents
Content	Content Network	Open Content Network	No
Content	Follow-Up Evaluation: Application of Learning	Follow-Up Survey	Yes, currently it is called Survey
Content	Item Evaluation: User Satisfaction	Course Evaluation	No
Content	Questionnaire Survey	Survey	No
Item	Blended course	Instructor-Led with Online Content	Yes, currently it is called Instructor-Led and Online Course
Item	Length	Duration	Yes
Item	Thumbnail File	Image	No
Item	Learning Event	History Record	Yes
Finance	Order ticket	Voucher	Yes
Finance	Subscription	Free of Charge Subscription	No
General	Notification	Email Notification	No
General	Subordinate	Direct Report	No
Learning Activities	Requirements	Curriculum Requirements	Yes

LMS Area	Current Term	New Term	User Side Impact
Learning Activities	Group Instances	Class Groups	No
Learning Activities	Scheduled Offering	Class	Yes
Learning Activities	Slots Reserved	Reserved Seats	No
Learning Activities	Schedule Block	Resource Block	Yes
Library	Catalog	Library	Yes
Library	Subject Area	Category	Yes, currently it is Topics
People	Classes	Cohorts	No
People	Group	User Group	No
Role	Alternate Supervisor	Alternate Manager	Yes
Role	Supervisor	Manager	Yes
System Admin	Custom Columns	Custom Fields	No
System Admin	Deployment locations	Content Deployment Locations	No
System Admin	Domains	Security Domains	No
System Admin	Global variables	Global Application Settings	No
System Admin	Record	Entity	No
System Admin	Subdomains	Security Subdomains	No
System Admin	Time Slots	Time frames	No
System Admin	Workflows	Permissions	No
User	External Requests	External Learning Requests	Yes

3. Access, Navigation and General Guidelines

Accessing SuccessFactors Learning Administration (Platform/Learning Integrated Environment)

The "Learning Administration" tile will be present on the Platform home page. The tile is available if the administrator has been granted the *Manage Learning > Learning Admin Access Permission*. This permission is set within Platform.

How to Customize the Administrator Learning Home Page Content

The out-of-the box *Welcome to SuccessFactors Administration* video/tutorial and the administrator Quick Links currently on the Learning application homepage will not be available in the new admin interface. To prepare for this change, an administrator with the proper permissions can set up an introduction message that is displayed to administrators upon logging in to the system. This introduction message is set up by updating the contents within the Introduction Panel ID, titled DEFAULT_ADMIN_INTRO, found within the *System Admin > Application Admin > User Introductions >* menu option.

4. New Administrator Navigation

When logging into Learning, administrators will see the new administrator interface. Below is an example image of the new administrator interface. Note that these options are highly dependent on the system configurations and the system permissions granted to the administrator.

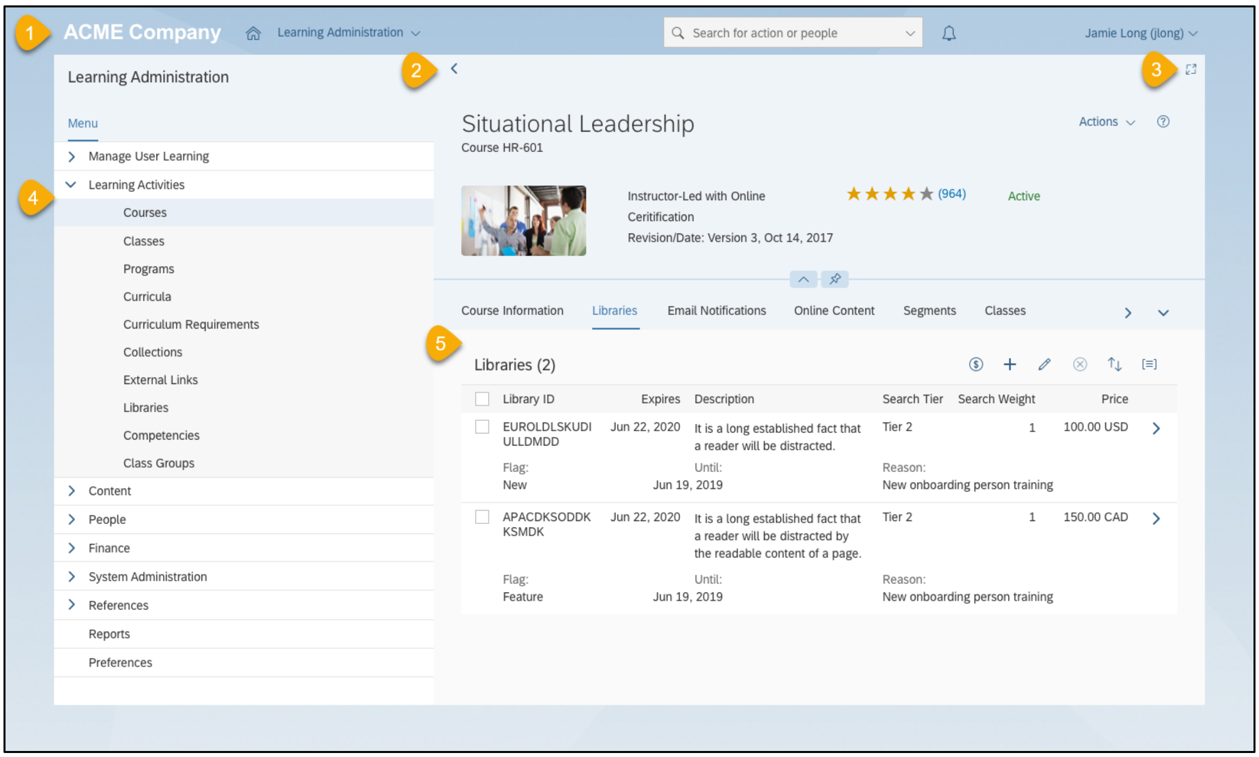


Figure 1.1 – New Administrator Interface Navigation

New Administrator Navigation Components and Description

Components	Description
1. HCM Platform Header	It is present on all pages as the administrator navigates within the LMS.
2. Shell Bar	It sits above the Entity Header and it is present as the administrator navigates within the LMS. It contains the Full Screen Mode feature.
3. Full Screen Mode	On selection, the left-side Menu Navigation will either show or hide. It expands the Workspace Area as it increases the real estate for the admin to work with.
4. Menu Navigation	In the current Admin UI, these are the top horizontal menus which on selection render a left-side vertical menu of additional functions. The new design follows a tree navigational structure on the left frame of the page, granting access to a primary menu, with secondary and tertiary menus rendering the relevant menu options.

Components	Description
	Manage User Learning: • Manage User Learning is a new primary menu created to group current tools that are specifically for managing the user's learning. This provides the administrator with a focal point to conduct tasks such as assigning and adding to users' learning history. **Manage Email:** • Manage Email is a new menu created under the System Admin primary menu. It groups the tasks that involve setting up email notifications. **Relocated Menu Options:** • Currently, Tools exist under the main menus Users, Learning, Content, and System Admin. The functions within Tools have been moved and organized under appropriate primary menus to provide an organized menu structure. • Content Network, Activate/Deactivate Content Network, Tasks have been relocated as secondary menus under Content primary menu. Currently these functions exist under the Learning main menu. • Instructors have been relocated to People, as it is the creation and management of these individuals. To see the full updated menu navigation structure, **see** Section 5 **Menu Navigation Structure**. **Removed Menu Options:** Some menus and functions have been removed because either they were a duplicate of another function in the system or are no longer supported. **See** Section 9 **Removed Functionality for more information.**
5. Workspace Area	The workspace area is the area to the right side of the menu navigation. It renders the pages driven by the selections made from the menu navigation. When an entity search is conducted, the workspace area will present the current search functionality. When creating, editing, or managing one of nine (9) major entities, the workspace area will render the entity manager which is the new look and feel to access the entities in the system. **See** Section 6 **The Workspace Area for more information.**

5. Menu Navigation Structure

Click HERE to download the current menu navigation and terminology mapped to the new menu navigation structure and terminology.

6. The Workspace Area

The workspace area located to the right-side of the menu navigation, renders the search functionality, the entity manager, and overall system admin functions which include system configuration, references, and overall administrator management tasks.

The Search Functionality and System Administrator Functions

The search functionality across all the entities and system functions such as Automatic Processes, Connectors, Background Jobs, Environment, Configurations, including current tools that will be secondary menu options, will remain as currently designed. These functions designs are not changing at this time.

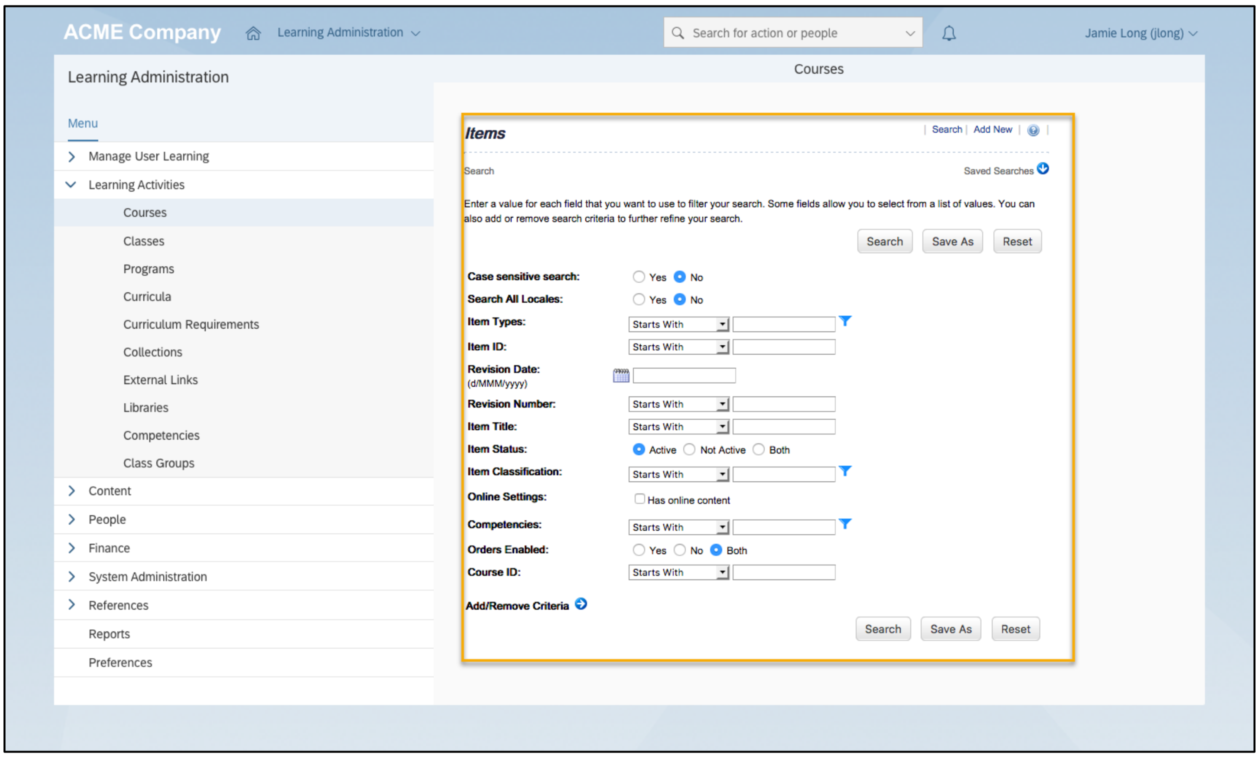


Figure 1.2 – Search Functionality

Entity Manager

The entity manager is the new layout presented when creating, editing, or managing the nine (9) major entities in the system, which are:

- User
- Assignment Profile
- Item
- Class (Scheduled Offering)
- Library (Catalog)
- Curriculum
- Coupons
- Free of Charge Subscriptions (Subscriptions)
- Purchase Order (Prepaid Account)

The entity manager is made-up of three main components: the entity header, the entity tabs, and the Entity Detail Area. Below are images and a descriptive table of the entity manager and its components.

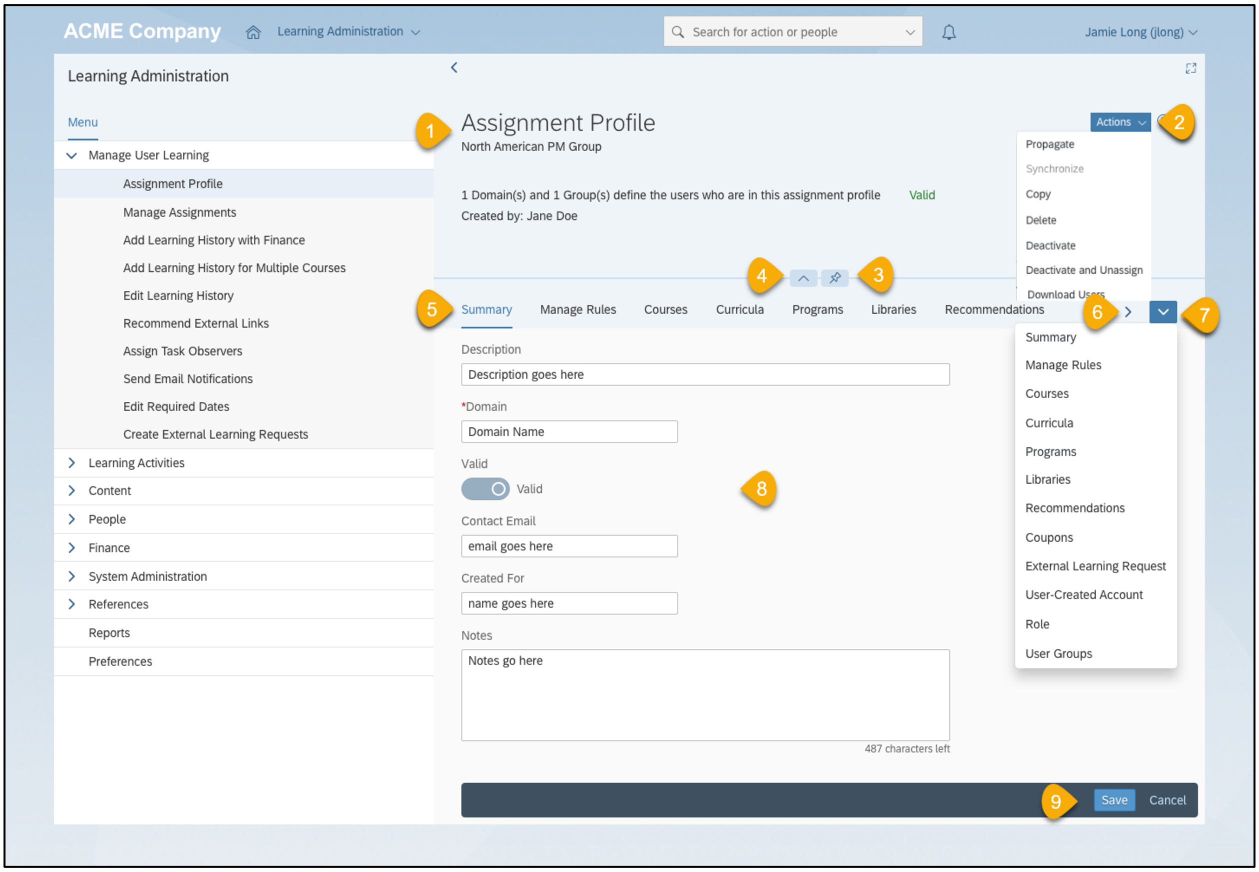


Figure 1.3 – Entity Manager Navigation

Entity Manager Components and Description

Components	Description
1. Entity Header	The Entity Header provides immediate entity information. It contains primary information such as title, description, respective entity status, and additional entity specific information. For example, average rating for items.
2. Header Actions	Depending on the entity and the permissions granted to the administrator, the header actions will display the relevant actions the administrator can take against the entity. For instance, if the entity is a an item, then one of the header actions will display the Assign action.
3. Push-Pin Icon	Located below the Entity Header, on selection it pins the entity header, making it static, so that when the admin scrolls up or down to view the data that is on the entity detail area, the header will remain visible.
4. Caret Arrow Icon	Located next to the Push-Pin icon, on selection it shows or hides a portion of the Entity Header.

Components	Description
5. Entity Tabs	In the current Admin UI, these are all the Related and Related More tabs available from an entity. With the new design, all the related associations pertaining to the entity will be shown in a tab form across the top of the entity detail area. The related associations are each of the actions needed in creating, editing or managing an entity.
6. Entity Tabs Overflow Arrows	Scrolls to the end or beginning of related associated tabs by selecting the right or left arrow of the entity tabs, respectively.
7. Entity Tabs Drop-Down	Displays a complete menu of the entity tabs per entity including the summary.
8. Entity Detail Area	The central area where the administrator performs multiple tasks such as create, edit, and manage an entity. It renders specific fields, settings, and functions based on the entity tab that is selected. Provides the administrator with a focused view of the tasks they are completing per each entity tab.
9. Entity Footer	Save and Cancel actions are available for the admin to save the information entered.

7. Common Components Across All Entities

Entity Tabs

On accessing an entity, the first entity tab is the default landing tab. If the administrator has permissions to edit the entity, then the first tab's Entity Detail Area will render in edit mode, otherwise it's a view-only area. Subsequent tabs will render as view-only, if the administrator has permission to edit then the edit function (Pencil icon) is available to make modifications to the entity.

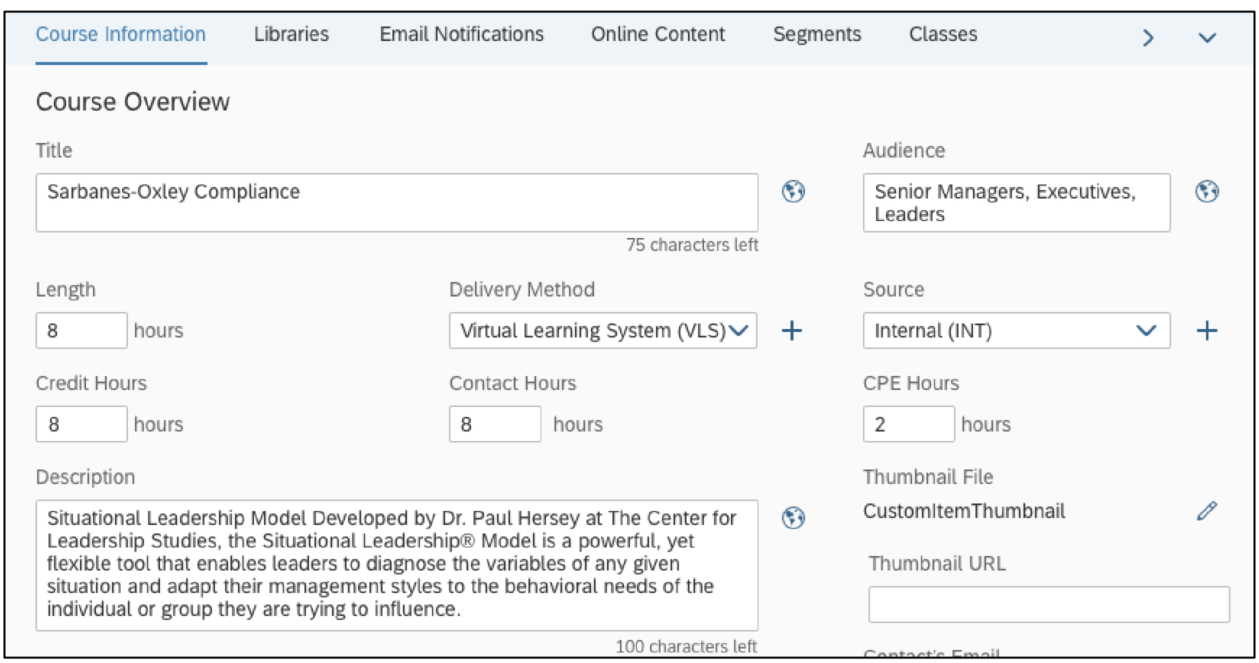


Figure 1.4 – First Tab Entity Detail Area – Edit Mode

Table and Table Toolbar

Depending on the entity and the selected entity tab, the data associated is presented in a table format. If no data has been associated, the table will present a message communicating that there are no associations with the entity. The functions that are shown from the table toolbar are specific to the related tab.

Figure 1.5 – Table and Table Toolbar

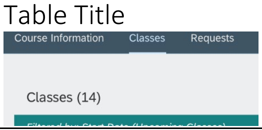
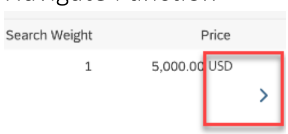
Table Components	Description
Table Title 	Displays the Entity Tab Title followed by the number of associations tied to the entity in parenthesis. Example: Classes tab menu is selected and the associated classes with the Item would display as “Classes (14)”
Table Toolbar	The table toolbar is available within specific entity tabs where the associated data is presented in a table format. The table toolbar includes specific functions relevant to the related tab, followed by the Add, Copy, Edit, Remove, Sort, and Grouping functions if the entity tab supports these functions. If there aren’t any associations that have been made yet then the only active function is the Add function; the Edit, Remove, Sort, and Grouping functions will be available but inactive. If the admin only has the view permission, then only Sort and Grouping functions will be available to them. The Add, Edit & Remove functions will not be available.
Dollar Sign Icon	This function is specific to the Library entity tab within the Item entity. On selection, it brings up the Change Library Price dialog window.
Add Icon	This function brings up the related association search function. The admin can conduct a search and select from the search results to Add and make the association.
Pencil Icon	On selection, the data within the related tab becomes editable. The admin can make edits where needed and either save or cancel the changes.

Table Components	Description
Remove Icon 	At least one of the related data's checkbox must be selected for the remove icon to become active. On selection, the association is removed.
Sorting Icon 	On selection, a dialog window prompts the administrator to select which column to sort by, and whether it should be in an ascending or descending order.
Grouping Icon 	On selection, a dialog window prompts the administrator to select which column to group by, and whether it should be in an ascending or descending order.
Navigate Function 	Available in the form of an angle bracket (>) per each data row. On selection it navigates directly to the selected entity's detail area.

Validation Error Indication and Error Messages

If any of the required fields and/or settings are left blank or do not meet the validations, the system will outline the field in red. A message will outline the fields that require attention.

Figure 1.6 – Error Indicators

Confirmation Message Toast

A popup confirmation message displays for a few seconds on the successful modification of an entity.

Figure 1.7 – Changes Saved Confirmation Pop-Up

8. Checklist to Prepare in Advance

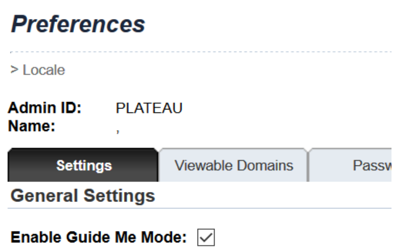
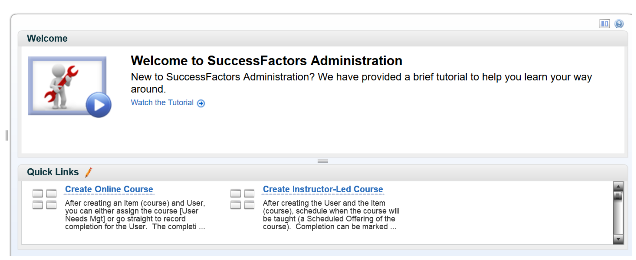
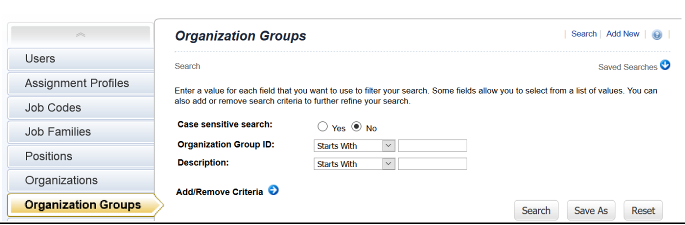
The table below lists configurations and set ups that an administrator can review now in preparation to the new Administrator interface.

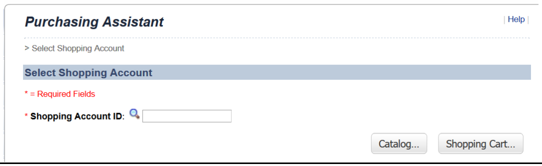
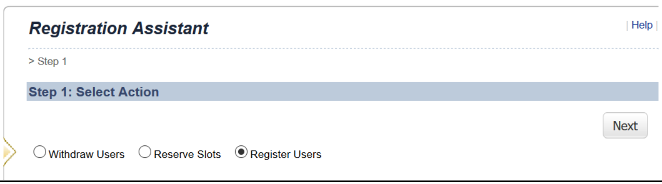
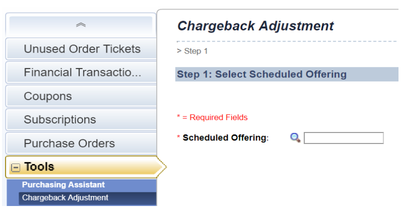
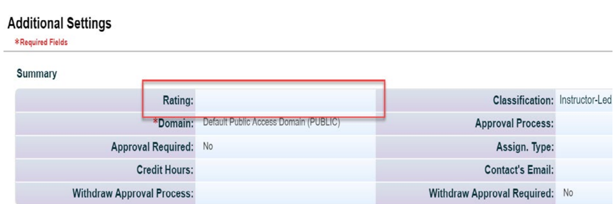
Configuration/Set Up Question	If Yes, Take this Action	Explanation
Is *System Admin> Configuration> System Configuration> LMS_ADMIN> emailValidationEnabled* set to false?	Ensure all email addresses are properly formatted for the following: • *User> Email Address Assignment* • *Profile> Contact Email* • *Item> Contact's Email* • *Scheduled Offering> Email* • *Catalog> Contact Email* • *Coupon> Owner Email* • *Subscription> Owner Email* • *Purchase Order> Balance Notification Email(s)*	Since email addresses are used by the system to send email notifications, all email addresses on major entities will be validated when saving the entity in the new Learning Administration application. Note that connectors will not be impacted.
Are you using *Item> Ratings field*?	Enable user to rate items instead of an admin populating this field.	This field has been deprecated and removed as the functionality is replaced by allowing user ratings. The intent of this field was to allow an admin to manually tabulate a rating based on learner surveys. Now that learners can rate the item, this field is no longer necessary.
Are any major entity related entity tabs hidden in *System Admin> Configuration> Record Configuration*?	Check the current records configurations, take note of the entity tabs that are not visible and check for its respective workflows. Remove workflow from admin role to maintain it being hidden.	Related Entity tab visibility in the new admin UI is controlled via workflow versus record configuration. The tab will always appear if there is not a specific workflow for that tab.
Do you have users with view only access?	Be aware that they will now be able to view the value for Approval Process fields without needing the Search Approval Process workflow.	Currently in view or edit mode an admin cannot see the value for domain, approval process, withdraw approval process unless they have the corresponding search workflow. In the new application, Admins will be able to view the Domain set on an entity without Search, Edit or View Domain workflow as long as they have the View Item or Edit Item workflow. The value will be read only when the admin is in either view or edit mode without Search Domain workflow and the admin will be able to change the Domain for an

Configuration/Set Up Question	If Yes, Take this Action	Explanation
		entity if they have Search Domain workflow. Note that a workflow is still required to view any custom column labels and values.
Do your admin roles, that can access reports, exclude the Search Reports workflow?	Add Search Reports for admins with this role to access the Reports menu.	The Search Reports workflow controls access to reports in the new Learning Administration.
Do you have number fields on an item with values greater than 99,999? (Length, Credit Hours, Contact Hours, CPE Hours, Min Registration, Max Registration, Registration Threshold, Gamification Base Points or Prep Time)	Ensure that field values that exceed 99,999 are reduced to a value of 99,999 or less.	Item 'number' fields will be limited to values 'blank' and 0 through 99,000 (whether decimal or whole numbers), except for the two fields: Initial Number, and Retraining Number, as they have special validation rules based on the associated Basis field selection. This change streamlines the validation messages to the administrator.
Are you using Organization Groups?	Create an Organization Custom Column to manage grouping. Limitation: An organization can only have 1 referenced value for a custom column.	As noted in Section 9. This functionality is being deprecated.
Are you using *User> Coach, Position, Resume, Prior Months of Service, Prior Years of Service*?	Migrate this data to the HCM platform.	These fields have been deprecated as the functionality is replaced by managing users in the HCM platform.
Do you have administrator roles with a workflow that grants access to a related entity tab, for any of the 9 major entities, and that related entity tab is disabled via the *System Admin > Configuration > Module Tab?*	Remove the workflows from the admin role to prevent admins from accessing the related entity tab.	The new entity manager displays the related tabs primarily based on workflows and does not honor the Module Tab configurations.

9. Removed Functionality

Below is a list of all removed functionality. Related configurations and permissions (workflows) associated with these functionalities will also be removed. With the release of the new Learning Administration Application, SAP SuccessFactors will no longer support the features below in the legacy Learning Administration application. This means Customer Support will answer how-to questions but will not fix or patch the legacy application. Click [HERE]() to download the legacy menu navigation and terminology mapped to the new menu navigation structure and terminology.

Removed Functionality	Information/Notes
Admin Power Search bar with command and keyword Search  	Power Search Synchronization and Optimization automatic processes are also being removed.
Guide Me Mode and Recommended Next for performing a task  	Related configuration is also being removed.
The out-of-the-box *Welcome to SuccessFactors Administration* video/tutorial and the Home page quicklinks  	These are aspects of the Flash application interface that are being removed. Recommendation is provided in [Section 3]() of this document.
Configuring fields and tab order of the 9 major entities and corresponding personalized views. The 9 major entities are Class, Item, Curriculum, Library, User, Assignment Profile, Coupon, Prepaid Account, and Free of Charge Subscription	Additionally, these entities will be removed from System Admin> Configuration> Module Tab. Field and tab order will be set based on best practices which will apply to all administrator users.
Organization Groups  	Customers can create an Organization Custom Field to manage grouping.

<table>
<tr><th>Removed Functionality</th><th>Information/Notes</th></tr>
<tr><td>External Reports</td><td>Lack of use.</td></tr>
<tr><td>Purchasing Assistant

</td><td>An administrator can purchase on behalf of a learner using proxy mode.</td></tr>
<tr><td>Registration Assistant

</td><td>An administrator can register a learner into a class from the class entity.</td></tr>
<tr><td>Chargeback Adjustment tool within Commerce (functionality is available via other means)

</td><td>An administrator can adjust a charge via Scheduled Offering> Advanced; Learning Event Editor or Order Management.</td></tr>
<tr><td>Admin’s ability to rate an Item

</td><td>Enable user to rate items instead of an admin populating this field.</td></tr>
<tr><td>User entity’s Prior months of Service, Prior years of Service, coach, position and Resume fields


Note: Image only shows two fields. Remaining fields are accessible by selecting the View All link.</td><td>Customers should use the platform for this employee information.</td></tr>
</table>

Removed Functionality	Information/Notes
Organization Dashboard (User side and settings on User record)	Customers can use Work Force Analytics (for a cost), develop a custom report, or wait for new reports through SAC.
Performance main menu Talent Profile Competency Assessment Performance references (Competency Categories, Competency Sources, Competency Types)	These are now managed in Talent.

Removal of Legacy Plateau Features

The new Learning Administration Application will run concurrently with the legacy application for two releases. The legacy version containing Flash will be removed and all Flash components within Learning will be removed from the user and administrator side. This will include the following Legacy Plateau features. For any removed feature the corresponding settings or configuration will also be removed:

- Organization Initiative, Succession Planning, Assessments and Skills Inventory on User entity
- Ability to Add Competency
- Talent Profile
- Job Family
- Positions

Job Family and Positions were part of the Performance Module of Plateau which has been deprecated. Customers should use the platform Job Profile Builder functionality.

Accessibility Notes

The "Turn Accessibility On" link in Flash is not necessary in the new administration interface as the application can be used with standard keyboard shortcuts so no onscreen instructions are required for navigation and removing Flash improves the use of screen readers.

10. For More Information

Visit the [Customer Community blog] to stay informed on the upcoming release of the new Learning Administration Interface. Share feedback on this guide and post questions in the comments section.

Phase II of The Transition Guide

As indicated earlier, Phase II of this guide will have more detail information on the flash replacement of major entities, for instance Assignment Profile will have the function to Download Users. Other entities that will be included are Class (Scheduled Offering) and Online Item. Additionally, the terminology changes for the entities' detail fields will be provided.