Replace with
Customer Logo

<Customer Name>

Learning Configuration Workbook

SuccessFactors Version 6.4

Table of Contents

1) Introduction and Business Analysis

1.1 Company Background

Company Background here

1.2 About This Document

This configuration workbook is a formal deliverable under SuccessFactors Statement of Work <SOW #>. The information and details contained here are a direct result of a series of workshops between SuccessFactors consultants and <Customer> project team members. The configuration workbook includes all references necessary for configuring the SuccessFactors Learning application as identified in the workshops to support <Customer>'s learning management needs within the project's identified scope.

1.2.1 Attachments to this Document

Attachments to this document, such as Technical Deliverables listed in Appendix A and any other appendices and attachments are part of the formal deliverable.

1.2.2 Future Revisions to this Document

This configuration workbook, once it is accepted by <Customer Name>, can be updated by <Customer Name> as decisions are made over time to change or add to the solutions and configuration decisions contained in the document. It is the responsibility of <Customer Name> to maintain this document in those cases. Future releases of the SuccessFactors application may require changes to the configuration workbook.

1.3 Current State

Document the current state of your organization's learning management initiatives. This section should include information about distinct learning Administration groups, learning audiences, and applications used. Discuss online training delivery and tracking, as well as instructor led and virtual training delivery.

Notes

1.4 Gap Analysis

Listed below are gaps identified by <Customer Name> between the desired state and functionality available in the SuccessFactors Talent Management Suite. Solutions are documented where possible, whether involving creative uses of the application or changes to existing business process. Customizations are not recommended as they greatly increase the complexity of applying upgrades, service packs, and patches.

Gap Description	Solution Notes

2) User Management

Users are represented by database records which contain not only detailed demographic information (usually captured from an HR system of record), but also tied to a transcript of all completed training and non-training events (learning history). In order for an individual (employee or non-employee) to access online content or register for instructor led offerings, the individual must have a User record in SuccessFactors Learning. Make note in the document for the specific plans or no plans for using an HR Connector, and if used, identify the HR Connector workbook location or name.

2.1 User Attributes

Most User attributes are searchable and may be used to assign training via both manual and automatic processes (described later in this document). The following table summarizes the fields on a User record. A separate HR connector workbook (if applicable) is used to document actual mapping of data from the HR source(s) to SuccessFactors Learning. User record attributes are explained in more detail in the sections following this table.

Field	Character Limit	Suggestions	Source	Sample Value
User ID	30	*001123 (employee #)*		
Related Admin				
User Status	1	*Active / Inactive*		
Domain	30	*CORP (LOB)* *DC (Regional)*		
Role	30	*Default User*		
Last Name	50	*Smith*		
First Name	50	*John*		
Middle Initial	30	*M*		
Gender	1			
Comments	2000			
Organization	30	*HR (LOB or cost center)* *West (Regional)*		
Primary Supervisor ID	30	*001122 (employee #)*		
Coach*	30			
Job Title	100	*HR Director* *Sales Associate*		
Job Code	100	*HR-10001* *SALES_04-100*		
Job Location	30	*Washington, DC Headquarters*		
Employee Type	30	*Exempt* *Contractor* *Permanent*		
Employee Status	30	*Full Time* *Hourly*		
Region	30	*MD* *CA* *Northeast*		
Prior Years of Service	Float	*2 Years 4 Months*		

Field	Character Limit	Suggestions	Source	Sample Value
Resume	300	*Path to resume if applicable. This is not a hyperlink.*		
Hired Date	Date			
Terminated Date	Date			
Related Instructor	30	*001122 (employee #)*		
Address	300			
City	100			
State/Province	50			
Postal Code	50			
Country	100			
Email address	128	*john.smith@corphq.com*		
Phone Number (1)	30			
Alternate Job Code(s)	50			
Billing Name				
Address 1 (Billing)	300			
Address 2 (Billing)	300			
City (Billing)	100			
State/Province (Billing)	50			
Postal Code (Billing)	50			
Country (Billing)	100			
Contact Name (Billing)	100			
Contact Telephone (Billing)	30			
Fax (Billing)	30			
Email (Billing)	128			
Shipping Name	100			
Address 1 (Shipping)	300			
Address 2 (Shipping)	300			
City (Shipping)	100			
State/Province (Shipping)	50			
Postal Code (Shipping)	50			
Country (Shipping)	100			
Contact Name (Shipping)	100			
Contact Telephone (Shipping)	30			
Fax (Shipping)	30			
Email (Shipping)	128			
Make Shipping Address the same as Billing Address				Option Y/N
Account Code	30			
User Can Use Org Accounts:				Option Y/N
Active Locale ID	100	*English CA French*		
Currency ID	30	*USD US Dollar*		

Field	Character Limit	Suggestions	Source	Sample Value
Time Zone ID	100	*EDT America/NewYork*		

*Coach field is used for Career & Development (Separately Licensed).

2.1.1 User ID

This is the primary key for the User record in the database. The User ID is used for the User login into SuccessFactors Learning. User ID naming convention may distinguish certain types of Users; for example, contractors from the permanent employees.

Discuss how Users are created, and if created manually, identify a naming convention for new User records. Manually created User IDs may be auto-generated (sequential numeric ID).

Example User ID	Source
345322	*HR Database*
CON-873733	*Manually Added by Records Admin*

Notes

2.1.2 User Status

User records in SuccessFactors can be set to “active” or “inactive” status. This status determines whether or not the record appears in default administrator searches and reports. Record inactivation can be included as a part of role management and securities measures. Deleting User records is not recommended (for historical reporting purposes), but if necessary administrators may delete User records if they have the associated permissions.

In this section, discuss the business rules and process for inactivating User records.

Notes

2.1.3 Domain

User Domain refers to record ownership as determined by the domain model documented in section 11.1 of this configuration workbook. Domains are used to control which groups of administrators may work with the User record. For example, if a group of administrators should have access to assign training to a specific User population, those Users should reside in a unique domain.

Notes

2.1.4 Role (User Role)

User roles determine menu access on the User side of SuccessFactors Learning. Usually there is only one User Role assigned to all Users (Default User Role). If necessary, additional User Roles may be created and assigned to Users automatically via Assignment Profiles. This is necessary only if certain populations of Users require menu access that varies from the default role. User roles are documented in section 11.3.3 of this configuration workbook.

Notes

Notes

2.1.5 Comments

The comments field on the User record is administrator-facing and may be used at the administrator's discretion. Comments are sometimes used to document changes that administrators made to a User record that deviate from the normal business processes.

Notes

Talent Profiles - details are on pages 18 and 105.
Organizations - details are on page 18.

2.1.6 Supervisor

A User's supervisor is identified by the supervisor reference on the User's record. Additional supervisors can be defined for any employee. This allows organizations to model their structure even when matrix relationships are present. The existing supervisor or an administrator can define these relationships. Supervisors may have additional workflows to perform on subordinate records such as assigning and recording learning. If an administrator changes a User's supervisor and that prior supervisor had pending approvals (learning and/or performance related) SuccessFactors will prompt the administrator to choose to re-route the pending approvals to the new supervisor.
.

Supervisors will have the ability to delegate their responsibilities to other users. Delegation is dealt with in role management and under notifications that can be sent out.

Notes

2.1.7 Alternate Supervisor

A Supervisor (and an administrator) can add other users as an alternate supervisor for any of their subordinates. When defining an alternate supervisor, the user selected as the new alternate is responsible for filling out Performance Reviews and/or Competency Assessments.

Notes

2.1.8 Coach

The coach field is used by SuccessFactors Career & Development (My Plan). Unless this field is referenced as part of a customization, it is not used in SuccessFactors Learning.

Notes

2.1.9 Job Title

Job Title is not directly tied to Job Code, but may be used as part of the HR connector or manually updated to record the title of the Users Job Code. Job Title is not a searchable field and is not an available attribute for Assignment Profiles. There is no reference table that needs population.

Notes

2.1.10 Job Code

A job code is a job title in your organization. From a single job code, you create multiple positions, each an instance of the job code. Assign job codes to positions and users to help with assignment profiles, item or competency assignments, compensation, and succession planning. Job Codes may have an auto-assign function. This Job Code-to-Curriculum alignment may be an important method for auto-assigning training to new employees and those employees whose Job Codes change. Users may have only one Job Code. Job Codes, prior to 6.4, were called Job Positions.

Note: Job Codes have attributes which aid in Career and Succession Planning (separately licensed modules). “Leads to” and “Leads from” Job Codes determine a ‘Career Path’ for use in Career Planning. Degrees, Skills, Languages, and Security Clearances support Talent Searching. These fields are available to be populated without these licenses applied, but have no impact on Job Code functionality.

User Management > Job Codes

Example Job Code ID (50 Char)	Description (100 Char)	Domain
FIN-100876	*Account Manager*	*ABC*

Notes

2.1.11 Job Location

The Job Location is not directly tied to Job Code ID and is usually mapped to an employee’s office location in the HR system of record. This field could be used in an assignment profile to assign training to employees who have a common job location.

References > User Management > Job Locations

Example Job Location ID (30 Char)	Description (40 Char)
DC	*Washington DC Office*

Notes

2.1.12 Employee Type

Employee type is another way to categorize Users, and usually represents a pay type or employee/contractor differentiation.

References > User Management > Employee Types

Employee Type ID (30 Char)	Description (40 Char)
CNTR	*Contractor*
EX	*Exempt Employee*
HOUR	*Hourly Employee*
HOUR	*Hourly Employee*
INTERN	*Intern Employee*
NONEX	*Non exempt Employee*
SAL	*Salaried Employee*
UNION	*Union Employee*

Notes

2.1.13 Employee Status

The employee status indicates the current relationship of a User to the business. This field is often used in assignment profiles to distinguish between employees with other criteria in common. For example, grant catalog access to all employees in a specified organization if their employee status = 'permanent.'

References > User Management > Employee Statuses

Employee Status ID (30 Char)	Description (40 Char)
LEAVE	*On leave*
FT	*Full Time*
PERM	*Permanent*
PT	*Part Time*
TEMP	*Temporary*

Notes

2.1.14 Region

Regions are associated with User, facility, and instructor records. Region is a searchable criterion used by administrators to find instructor and facility records. When facilities are associated with regions, Users have the ability to locate Scheduled Offerings based on their region. This attribute may be included as an attribute in assignment profiles.

Below are regions chosen by <Customer Name> and comments on how they may be used.

User Management > Regions

Region ID (30 Char)	Description (100 Char)
NE	*Northeast*

Notes

2.1.15 Prior Years of Service

This is typically used to capture years and months of service from the HR system of record or customization to the HR connector.

Notes

2.1.16 Resume

This field may contain a path to a resume location on a network drive. It will not be a hyperlink in the SuccessFactors application; it will simply display the path information.

Notes

2.1.17 Hire Date

This field is typically populated by an HR connector and may be used as part of an Assignment Profile for assigning training to Users who fall within a hire date window. Administrators may search for users by hire date (using "before" and/or "after" operators).

Notes

2.1.18 Termination Date

Termination Date may be populated by an HR connector if a User is terminated and becomes an inactive record in SuccessFactors Learning. Inactive Users may be reactivated with all historical information intact if the User is re-hired.

Notes

2.1.19 Related Instructor

Related Instructor is a link to the instructor resource record. This is a one to one relationship and does not provide the user access to the administrator interface. It can potential be used to allow the user to approve a learning event if that user was the instructor in the scheduled offering.

Notes

2.1.20 Address, City, Postal Code

This is typically used to capture the address information that is used in SF-182 (separately licensed module).

Notes

2.1.21 Country

Countries are associated with User's main, shipping, and billing addresses.

Below are countries to be created by <Customer Name>.

References > Geography > Countries

Country ID (100 Char)	Description (100 Char)
US	*United States*

Notes

2.1.22 Email address

SuccessFactors offers the ability to notify Users automatically through various system triggers and manually via ad-hoc notifications. In order to receive email notifications, Users must have an email address specified for their record.

Notes

2.1.23 Phone Number

Each User record may have an unlimited number of phone numbers. However, each phone number must be unique – there cannot be two identical phone numbers with different descriptions.

Note: The User Interface Supervisor Org chart displays a phone number for subordinate users. This number is always the first *numerically* (phone number value – not description). To control which phone number is displayed first on the Org Chart, an alpha-numeric character such as a hyphen can be used as a prefix to the number so that phone number will be displayed first.

Notes

2.1.24 Alternate Job Codes

Additional Job Code IDs may be listed on the Alternate Job Codes tab of a User's record. These alternate Job Code references do not auto-assign curricula or competency profiles like the Job Code ID specified on the summary tab can. However, used in conjunction with Assignment Profiles (section 2.5), Users may be assigned curricula, catalogs, and competency profiles using alternate Job Code(s) as a criterion.

Notes
NOTE: Located under Related section in user's record.

2.2 User Talent Profile

Talent Profiles are configured globally. See section 12.2.8 for more information about Talent Profile configuration.

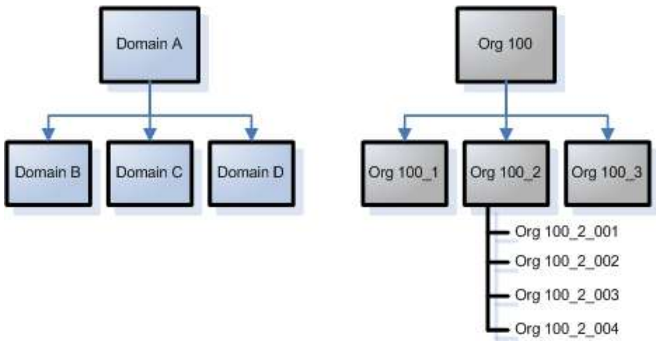
Listed below are the available Talent Profile Sections for SuccessFactors Learning. Workflow may allow an administrator access to the talent profile on the summary tab.

Talent Profile Sections	
Contact Information	Contact Numbers
Employee Information	Career Planner (Performance Module)
Awards	Competencies
Communities	Current Goals (Performance Module)
Curricula	External Work History
Education	Interests
Groups and Association	Internal Work History
Language Skills	Other
Learning History	Notes
Past Goals (Performance Module)	Promotion Readiness (Performance Module)
Skills (Performance Module)	Succession Planning (Performance Module)
Security Clearance	Projects
Professional Licenses / Certifications	
Performance (Performance Module)	
Preferences	

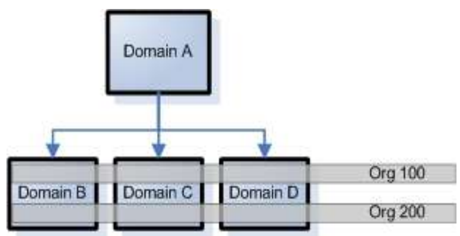
2.3 Organizations

Organizations are one of two hierarchical structures in which Users reside. (The domain structure is the other). Users' association with organizations allows for greater searching, reporting, and training assignment, and financial transaction capability.

Defining organizations usually follows one of two approaches: 1) Mirror the domain structure, but define organizations at a deeper level. 2) Cross-cut the domain structure to allow for a different assignment and reporting perspective. Organizations are directly associated with scheduling slots (see section 5.1.10). If anticipating using slots frequently, a simplified organization structure is recommended.



Example 1: Organizations mirror domain structure, but extend to a deeper level.



Example 2: Organizations span domains allowing for different assignment and reporting perspective.

Example organizations are listed below. Discussion on the use of organizations has been captured below in the Notes.

User Management > Organizations

Example Organization ID (30 Char)	Description (100 Char)	Domain
100_2_001	*Finance and Accounting*	*ABC*

Notes

2.3.1 Organization Group

Organization Groups are records that contain organizations. This allows for more efficient searching and reporting in a complex organization structure. Organizations may belong to more than one group. (Global Table).

User Management > Organization Groups

Example Organization Group ID (30 Char)	Description (100 Char)
SALES	*Sales Organizations*

2.3.2 Organization Type

Organization Types are categories for organizations. Administrators may search for organizations with common organization types. (Global Table)

User Management > Organization Type

Example Organization Type ID (30 Char)	Description (100 Char)
CORP	*Corporate Organizations*

Notes

2.3.3 Organization Custom Columns (Custom Fields)

Custom columns allow SuccessFactors administrators to capture additional information about organization records. Use the table below to list organization custom columns. (Column numbers are usually listed in increments of 100 to allow for future custom columns within the range.)

System Admin > Custom Columns > Organization

Label	Col #	Referenced	Ref. ID Value or Field Description
Office	*100*	*N*	*Headquarters*

Notes

2.4 Class

Classes are groups of Users who typically proceed through Scheduled Offerings together. The class entity allows Users to be auto-enrolled in the Scheduled Offerings associated with it, and automatically assigns a Curriculum to the Users. Users who are removed from the class are withdrawn from the offerings and the Curriculum is unassigned. If instructor led training is not tracked, classes are one way to create an Admin-defined group of Users (for searching and reporting).

Learning > Classes

Example Class ID (30 Char)	Description (100 Char)	Domain
HR_NewHire_2009	*2009 New Hire Cohort*	*ABC*

Notes

2.4.1 Class Status

Administrators may change a User's class status, which is used as an indicator of the User's progress. Class status is a referenced table that must be populated. Class status is not automatically applied based upon the User attending or completing Scheduled Offerings associated with the Class. Rather, class status must be manually updated by an administrator in the Class record. A Users' Class Status may be accessed in report form (Reports > Class Progress) but is not part of any other SuccessFactors functionality. Below is a list of class statuses.

References > Learning > Class Status

Class Status ID (30 char)	Description (40 char)
On Target	*User is meeting expectations.*

2.4.2 Class Custom Columns (Custom Fields)

Class custom columns are used to capture additional information about classes.

System Admin > Custom Columns > Class

Label	Col #	Referenced	Ref. ID Value or Field Description
Period	*100*	*Y*	*Q1-2007* *Q2-2007*

Notes

2.5 Assignment Profiles

Assignment Profiles are created by administrators for the purpose of assigning Curricula, Catalogs, User Roles and Competency Profiles to Users who match the attributes selected. Once an assignment profile is created and propagated, the Assignment Profile Synchronization APM (section 14.1.1) must be scheduled to run. This APM checks Users for matches to assignment profiles and assigns (or un-assigns) the appropriate entities. Therefore, assignment profiles allow ongoing automatic training assignment to new Users and Users whose attributes change.

When creating an assignment profile, the administrator must; (1) specify what domain(s) are affected by this assignment profile; (2) identify the User attributes to select the appropriate group of Users, and (3) specify what Catalog, Competency Profile, User Role, or Curriculum is to be assigned to those Users.

2.5.1 Assignment Profile Operators

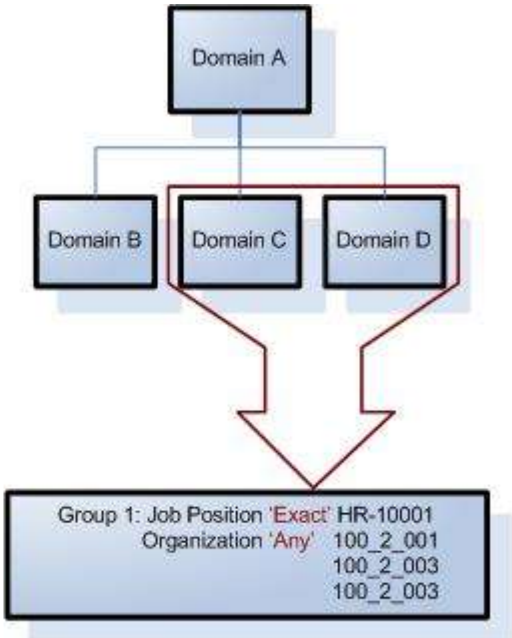
Assignment Profile Operators	
Matches	Starts With
Between	Does Not Match
Contains	Does Not Contain
Is Empty*	Is Not Empty
Equals	Does Not Equal
Greater Than or Equal to	Does Not Start With
Includes Sub Records of	On or After
Less Than or Equal to	On or Before

* ‘Is Empty’ Does not work with User Custom Column Values

2.5.2 Assignment Profile Attributes

Assignment Profile Attributes	
Address	Job Location ID
Alternate Job Code ID	Job Code ID
City	Organization ID
Country	Postal Code
Domain ID	Region ID

Assignment Profile Attributes	
Employee Status ID	State
Employee Type ID	User ID
Hire Date	Supervisor ID
Item Completion	All User Custom Columns



Domains Tab of Assignment Profile forces users to belong to specified domain before attributes are analyzed. This prevents admins from creating assignment profiles that affect users for whom they have no assignment permissions.

Attributes Tab of Assignment Profile is where groups of user attributes are defined. In order for users to match the AP, they must match all the attributes in at least one group. (This means there is an AND relationship between attributes with a group, and OR relationship between groups).

User Management > Assignment Profiles

Assignment Profile ID (50 char)	Domains	Attributes	Description (100 char)
CAT_ALL_GENERAL	*GENERAL (includes all sub-domains)*	*Group 1: Domain 'include sub domains' = GENERAL*	*Assigns the global catalog to all Users at General*
CURR_NHO_2009_HR	*HR*	*Group 1: Hire Date 'On or After' JAN/01/2009'*	*Assigns the 2009 New Hire Orientation curriculum to all 2009 New Hires in the HR domain*

Notes
An assignment profile naming convention suggestion is to include a prefix to indicate that the assignment profile is assigning a curriculum (CURR_), a User role (ROLE_), competency profile (CPCY_), or a catalog (CAT_). See samples in table above. Potential prefixes to be used in the naming convention for manually created/assigned assignment profiles:

Notes
• CURR_ (for curriculum) + general curriculum description • CAT_ (for catalog) + catalog title • CPCY_ (for competency profile) + competency profile title • ROLE_ (for User role) + User role title

2.6 User Custom Columns (Custom Fields)

User custom columns are used to capture additional information about Users which is not captured in any 'out of the box' field. Custom column may be referenced, and may be populated by the HR connector (if applicable). Administrators may use custom columns for searching and assigning purposes, including the assignment profile.

*After adding a User custom column, the Assignment Profile Synchronization APM must run to update the new custom column in the assignment profile attribute list (see section 14.1.2).

System Admin > Custom Columns > User

Label	Col #	Referenced	Source	Ref. ID Value or Field Description
Prior Supervisor	*100*	*N*	*HR Database (Prior_Sup)*	*Supervisor's Employee ID*
Is Supervisor?	*200*	*Y*	*Manually updated*	*Y (Yes)* *NULL (is not a supervisor)*

Notes

2.7 Job Code Custom Columns (Custom Fields)

Job Codes custom columns fields will improve the administrators' ability to track company-specific information related to Job Codes. Use the table below to list Job Code custom columns. Column #'s are usually listed in increments of 100 to allow for future custom columns within the range.

System Admin > Custom Columns > Job Codes

Label	Col #	Referenced
Finance manager	*100*	*N*

Notes

3) Learning Management

3.1 Items

Items are the building blocks of SuccessFactors learning management. They are the assignable units which typically represent all forms of training activities, including online and instructor led courses. They may also be used to represent non-training activities such as meetings and certifications as well as material goods (such as workbooks) made available for Users for purchase. When assigned to Users (via one of the many methods of assignment including User self-assignment), items populate Users' Learning Plans. Once an item is completed, a Learning Event is recorded against it and the item moves onto the User's Learning History. Therefore, items represent all completed training and non-training events listed in the User's historical transcript**. Note:** In 6.4 the process for adding an item has been consolidated to one page that adapts to the user's requests – only information necessary to the user's desired task is displayed.

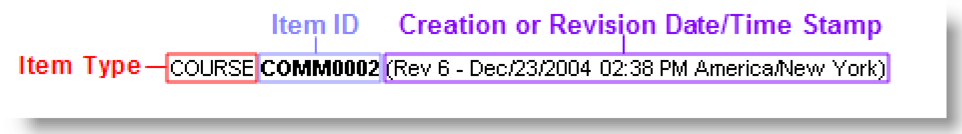
3.1.1 Item Classification

Item classifications determine how the item is used, and are automatically determined by SuccessFactors when the item is created and configured. There are four classifications in the system: Instructor-led now called Scheduled Only, Online only, Blended now called Scheduled and Online, and Other (i.e., physical goods). Items with online content (content objects and/or exam objects are classified as 'Online.' Items with instructor led segments are classified as 'Instructor Led.' Items with both segments and online content are classified as "Blended." Only Items with Instructor-led or Blended Classifications may be scheduled in SuccessFactors Learning. If there are no segments and no content, the Item is classified as "Other." It is recommended to identify segment/s in the Item Delivery Data tab for instructor-led items.

Item Classification	Typical Use
Instructor Led	Admin creates scheduled offering of item. Admin or supervisor registers user in scheduled offering, or user self-registers if available in a visible catalog. Admin may record completion for item based upon scheduled offering registrant list.
Online	Admin associates launchable online content (content objects or exam objects) with item. User is assigned (or self assigns) item and launches online content via Plateau User application. Learning event is recorded for item when all content is completed successfully and/or exam passed.
Blended	Admin associates launchable online content with item and scheduled offering(s) of item. Users may have option to complete online content if registered in an offering of the item. Content launch may be restricted to within the start and end dates and times of the offering.
Other	User self assigns item from catalog. If user is authorized to use an account code, the user may purchase the item and the appropriate account is charged the published price of the item.

3.1.2 Item Type

Item type determines the first of the three part unique item identifier (Item Key):



Item type is also directly associated with i**tem completion statuses**. For example, when an administrator records completion for the item type 'COURSE,' the completion status options could be 'Course Passed,' 'Course Failed' or 'Course Waiver Granted.' Some item types may have different grading options also, for example, a numeric grade may be used instead of a completion status. When an administrator records completion for this item type, a numeric value must be entered for each User which equates to a completion status as defined at the item type record level.

The table below contains a list of item types chosen by <Customer Name>:

References > Learning > Item Types

Item Type ID (30 char)	Grading Option	Description (40 char)
ASSESS	*None*	*Assessment*
BRIEF	*None*	*Briefing*
CERT	*None*	*Certification*
COURSE	*None*	*Course*
DOC	*None*	*Document*
EXAM	*None*	*Exam*
OJT	*None*	*On the Job Training*
ONLINE	*None*	*Online Course*
PRESENT	*None*	*Presentation*
READ	*None*	*Required Reading*
SELFSTUDY	*None*	*Self-Study*
SEMINAR	*None*	*Seminar*
SOP	*None*	*Standard Operating Procedure*
SURVEY	*None*	*Survey*
WRKSHP	*None*	*Workshop*

Notes

3.1.3 Item ID

The table below consists of a list of item ID naming conventions that apply to items created by administrators and those migrated from other sources. Defined are the rules associated with the creation of the records. Identify whether the <Customer Name> will use auto generate for id's.

Example Item ID (30 char)	Owner(s)	Naming Convention (40 char)	Domain
HR_001_Onboarding	*HR*	*2Char Dept_3Char Sequential#_Course Title*	*ABC*
NA-IT-SEC-001	*IT*	*2CharRegional Office ID-3Char DeptID-3Char Subject-Sequential#*	*DEF*

Notes

3.1.4 Completion Status

When administrators record successful completion for items (learning events), they must choose from a list of completion statuses associated with the item type (see Item Types above). Completion statuses are set to provide credit or not. An example of a 'not for credit' completion status is an item failure status. It is a best practice to create a 'substitute' or 'waiver' completion status if using substitute relationships between items. This allows the administrator to properly record a completion achieved through completion of another item and is documented as such. Listed below are completion statuses chosen by <Customer Name>.

In order for automatic assignment of level 1 and 3 evaluations (see page 36) to work when learning events are recorded, the flags for Item Evaluation and/or Follow-up Evaluation must be set. Some completion statuses, such as failures or substitutes, should not necessarily trigger a survey.

An administrator can determine whether or not an approval process should be used for a specific completion status. If approval processes are desired for completion of items, the e-sig functionality must be turned on globally. The e-sig process will trigger the approval process. If e-sig is not turned on (this is a global setting), the system will not display the drop down box for the approval process within the completion status record.

References > Learning > Completion Status

Completion Status ID (30 char)	Item Type ID	Credit	Description (40 char)	Triggers Item Evaluation	Triggers Follow-up Evaluation	Approval Process
ASSESS-PASS	*ASSESS*	*Y*	*Assessment Pass*	*Y*	*N*	*N*
ASSESS-FAIL	*ASSESS*	*N*	*Assessment Fail*	*Y*	*N*	*N*
						N
BRIEF-COMPLETE	*BRIEF*	*Y*	*Briefing Complete*	*Y*	*N*	*N*
BRIEF-SUB	*BRIEF*	*Y*	*Briefing Substitute*	*N*	*N*	*N*
BRIEF-INCOMPLETE	*BRIEF*	*N*	*Briefing Incomplete*	*N*	*N*	*N*
						N
CERT-COMPLETE	*CERT*	*Y*	*Certification Complete*	*Y*	*Y*	*N*
CERT-SUB	*CERT*	*Y*	*Certification Substitute*	*N*	*N*	*N*
CERT-INCOMPLETE	*CERT*	*N*	*Certification Incomplete*	*Y*	*N*	*N*
						N
CRSE-COMPLETE	*CRSE*	*Y*	*Course Complete*	*Y*	*Y*	*N*
CRSE-SUB	*CRSE*	*Y*	*Course Substitute*	*N*	*N*	*N*
CRSE-INCOMPLETE	*CRSE*	*N*	*Course Incomplete*	*Y*	*N*	*N*
CRSE-NOSHOW	*CRSE*	*N*	*Course No Show*	*N*	*N*	*N*
						N
DOC-COMPLETE	*DOC*	*Y*	*Document Complete*	*N*	*N*	*N*
DOC-SUB	*DOC*	*Y*	*Document Substitute*	*N*	*N*	*N*

Completion Status ID (30 char)	Item Type ID	Credit	Description (40 char)	Triggers Item Evaluation	Triggers Follow-up Evaluation	Approval Process
DOC-INCOMPLETE	*DOC*	*N*	*Document Incomplete*	*N*	*N*	*N*
EXAM-PASS	*EXAM*	*Y*	*Exam Pass*	*Y*	*Y*	*N*
EXAM-FAIL	*EXAM*	*N*	*Exam Fail*	*Y*	*N*	*N*
						N
OJT-COMPLETE	*OJT*	*Y*	*On the Job Training Complete*	*Y*	*Y*	*N*
OJT-SUB	*OJT*	*Y*	*On the Job Training Substitute*	*N*	*N*	*N*
OJT-INCOMPLETE	*OJT*	*N*	*On the Job Training Incomplete*	*Y*	*N*	*N*
OL-COMPLETE	*ONLINE*	*Y*	*Online Complete*	*Y*	*Y*	*N*
OL-SUB	*ONLINE*	*Y*	*Online Substitute*	*N*	*N*	*N*
OL-INCOMPLETE	*ONLINE*	*N*	*Online Incomplete*	*Y*	*N*	*N*
PRES-COMPLETE	*PRESENT*	*Y*	*Presentation Complete*	*Y*	*Y*	*N*
PRES-SUB	*PRESENT*	*Y*	*Presentation Substitute*	*N*	*N*	*N*
PRES-INCOMPLETE	*PRESENT*	*N*	*Presentation Incomplete*	*Y*	*N*	*N*
READ-COMPLETE	*READ*	*Y*	*Reading Complete*	*Y*	*Y*	*N*
READ-SUB	*READ*	*Y*	*Reading Substitute*	*N*	*N*	*N*
READ-INCOMPLETE	*READ*	*N*	*Reading Incomplete*	*Y*	*N*	*N*
SS-COMPLETE	*SELFSTUDY*	*Y*	*Self Study Complete*	*N*	*N*	*N*
SS-SUB	*SELFSTUDY*	*Y*	*Self Study Substitute*	*N*	*N*	*N*
SS-INCOMPLETE	*SELFSTUDY*	*N*	*Self Study Incomplete*	*N*	*N*	*N*
SEMR-COMPLETE	*SEMINAR*	*Y*	*Seminar Complete*	*Y*	*Y*	*N*
SEMR-SUB	*SEMINAR*	*Y*	*Seminar Substitute*	*N*	*N*	*N*
SEMR-INCOMPLETE	*SEMINAR*	*N*	*Seminar Incomplete*	*Y*	*N*	*N*
SOP-COMPLETE	*SOP*	*Y*	*SOP Complete*	*Y*	*Y*	*N*

Completion Status ID (30 char)	Item Type ID	Credit	Description (40 char)	Triggers Item Evaluation	Triggers Follow-up Evaluation	Approval Process
SOP-SUB	*SOP*	*Y*	*SOP Substitute*	*N*	*N*	*N*
SOP-INCOMPLETE	*SOP*	*N*	*SOP Incomplete*	*Y*	*N*	*N*
SRVY-COMPLETE	*SURVEY*	*Y*	*Survey Complete*	*N*	*N*	*N*
SRVY-INCOMPLETE	*SURVEY*	*N*	*Survey Incomplete*	*N*	*N*	*N*
WRKSHP-COMPLETE	*WRKSHP*	*Y*	*Workshop Complete*	*Y*	*Y*	*N*
WRKSHP-SUB	*WRKSHP*	*Y*	*Workshop Substitute*	*N*	*N*	*N*
WRKSHP-INCOMPLETE	*WRKSHP*	*N*	*Workshop Incomplete*	*Y*	*N*	*N*

Notes
Completion Status descriptions allow for use in multiple languages. Decide how this will be captured.

3.1.5 Item Revision Date and Time

When new items are created, the server date and time are defaults for this field and becomes the last part of the item key. Using the Revision Assistant administrators may revise items, creating a new item with a different date/time stamp (and the same item type and ID as the previous revision). Item revisioning is an important tool when items are updated and Users must be forced to complete the most recent version to maintain compliance.

3.1.6 Revision Number

Revision numbers prefix the Date/Time stamp in the Item Key. Revision numbers are not incrementally pre-populated when revising an Item, as different numbering methods may be in place across organizations; SuccessFactors alerts administrators when revising an Item if the revision number was not manually adjusted, but administrators may proceed with the revision provided the new Date/Time stamp is not identical to the last revision of the Item. Below are notes on Item revision numbering conventions:

Notes

3.1.7 Item Source

The item source identifies the origin of an Item and is an optional field which could be used for administrator searches. Listed below are item sources chosen by <Customer Name>.

References > Learning > Item Sources

Item Source ID (30 char)	Description (40 char)
EXTERNAL	*External*
HIGHED	*Higher Education Institution*
INTERNAL	*Internal*
NINTH	*Ninth House*
SKILLSOFT	*SkillSoft*
VENDOR	*Vendor*

Notes

3.1.8 Delivery Method (Method ID)

Method ID refers to the instructional delivery method. This does not determine the behavior of the item as does Item Classification. It could be used for additional Admin search capability and is an optional field at the item record level. Listed below are method ID's chosen by <Customer Name>.

References > Learning > Delivery Methods

Delivery Method ID (30 char)	Description (40 char)
AUDIO	*Audio*
BLEND	*Contains classroom and online components*
BOOK	*Book*
BRIEFING	*Briefing*
CORRESPONDENCE	*Correspondence*
DOC	*Online or Paper Document*
ILT	*Instructor Led Training*
OJT	*On the Job Training*
SIM	*Simulation*
SS	*Self Study*
VIDEO	*Video*
VLS	*Virtual Classroom Event*
WBT	*Web-Based Training*

Notes

3.1.9 Assignment Type

Assignment type determines the Item's default 'criticality' of User completion. When used in a Curriculum, the Item's assignment type is inherited and determines whether or not the Item must be complete for the Curriculum to be complete. All assignment types map to a required Y/N value, which refers to its criticality when used in a Curriculum. This field is displayed to the User. Below is a list of assignment types chosen by <Customer Name>:

References > Learning > Assignment Types

Requirement Type ID (30 char)	Required (Yes/No)	Description (40 char)
AOR	*NO*	*Area of Responsibility*
CAREER	*NO*	*Career Development*
LEAD	*YES*	*Leadership Training*
MAN	*YES*	*Mandatory*
MGR	*Yes*	*Manager Required*
OPT	*NO*	*Optional*
OSHA	*Yes*	*OSHA Required*
REC	*NO*	*Recommended*

Requirement Type ID (30 char)	Required (Yes/No)	Description (40 char)
REQ	*YES*	*Required*
REQNH	*Yes*	*New Hire Training*

Notes

3.1.10 Approval Process

Approval processes may be applied to Items, Scheduled Offerings, and Completion Statuses. They prevent user launch of online content, self registration in offerings, or recordation of learning events until approval is granted by other Users specified individually or by role as defined in the approval process record. When applied to an instructor led item, the approval process is inherited by the Scheduled Offerings, but may be removed or modified at the offering record.

Approval processes usually reference approval roles, which must be applied to User records. All supervisors (as determined by the system reporting structure) automatically have the Supervisor Level 1 system approval role and all users who are associated with an Instructor record automatically have the instructor role. There is no need to create a new role for supervisor levels 1 and 2 or instructors. However, all other roles need to be created and assigned to the appropriate users based on domain or organization. For example, if a Budget Coordinator must approve registration in Scheduled Offerings, an approval role must be created and assigned to specific Users. When administrators assign a role to a User, they must define the domains/organizations for which those Users will approve. The global setting in section 12.1.1 determines whether domain or organization is used to determine the User population for approval role control.

Typical 2 Step 'Finance' Approval Process

Step Name	Approval Role(s)	User(s)
Step 1: Supervisor	Supervisor Level 1	
Step 2: Finance	Finance	356789

Listed in the table below are example approval processes and roles that <Customer Name> may create.

References > System Admin > Approval Processes

Approval Process ID (30 Char)	Process Name (100 Char)	Domain
1 Step Supervisor	*One Level of Approval for Internal Items*	*ABC*

Notes

References > System Admin > Approval Processes > Approval Steps

Process ID (30 Char)	Approval Step #	Step Name (100 Char)	Approval Role / User ID	Approval Role / User ID
1 Step Supervisor	*1*	*Supervisor*	*Supervisor Level 1*	*Supervisor Level 1*

Notes

References > System Admin > Approval Roles

Approval Role ID (30 Char)	Description (100 Char)
Budget Approver	*Budget Approver*

Notes

3.1.11 Item Status

Items are active by default, but administrators may set items to an inactive status if desired. Once an item is inactive, it will not appear in the results of default item searches (but administrators may choose to search for and access inactive item records). If configured as part of the security model (section 11.3), some administrator roles may be restricted from accessing inactive records (record state restriction). Used in conjunction with an item revision process, inactivating previous revisions is an effective way to eliminate User launch of outdated online content.

Note: Although a state restriction exists for the 'Add Item' workflow (allowing administrators to add Item records as inactive only), the Add Item Wizard does not allow the admin to add inactive records. Item records must be created as active, and only when added, made inactive if required by business rules.

3.1.12 Hours

There are four types of hours associated with items: Credit, Contact, CPE (Continuing Professional Education) and Total hours. They all behave the same – when a learning event is recorded for an item, the User is credited for the number of hours of each type set at the item level unless the administrator overrides the hours at the time the event is recorded. Total hours are calculated by the number of hours in the delivery data segments of an instructor led item. Hour types are important when considering the use of Curriculum requirements (section 3.4). It is best practice for an organization to decide which of the hour types to use for various purposes.

Notes

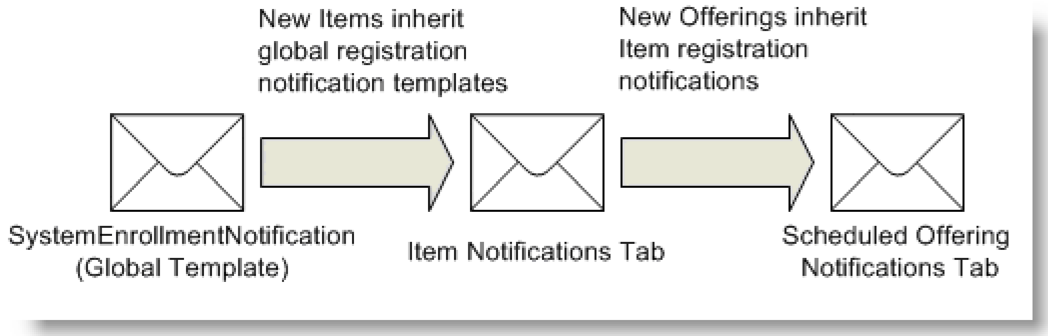
3.1.13 E-Signatures

E-Signatures force administrators and Users to enter a secondary authentication (PIN) when recording learning completion for an item. Before authenticating, learning events for items are 'unverified.' Enabling the use of e-signatures for items is a global setting (section 12.1), but must also be set at each individual item record which is subject to e-signature rules. Approval Processes can be attached to specific completion statuses, in addition to the e-signature setting.

Notes

3.1.14 Notifications

Administrators may modify the email notifications associated with Scheduled Offerings at the global level (see section 17.2), the item level, and the Scheduled Offering level. Email notifications triggered by Scheduled Offering actions include registration, User enrollment status change, Scheduled Offering segment change and offering cancellation. Administrators may attach a file to the emails that are delivered by the system.



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Notes

3.1.15 Subject Areas

When User's browse a catalog (if enabled), they land on the subject area listing page. This lists all of the subject areas associated with items that the User can see (because the item is in a catalog assigned to them via an assignment profile). The subject area structure is hierarchical, and items may reside in more than one subject area. Use of subject areas correlates with catalogs and User self-assignment of items, but it may also be used for Admin item record searches. Competency records may also be associated with subject areas, as part of an indirect item/Competency alignment model. Listed below is the subject area taxonomy as defined by <Customer Name>. Description is the User facing value in the Browse Catalog menu.

References > System Admin > Subject Areas

Subject Area ID (30 char)	Parent Subject Area ID	Description (40 char)
Software		*Software Application Training*
Office	*Software*	*Microsoft Office Products*

Notes

3.1.16 Period-Based Item Assignment (Initial Assignment)

When administrators assign items with required assignment types to Users (via any of the item and Curriculum assignment methods), SuccessFactors uses the Initial Period from the item record Design Data tab to calculate the required by date (due date). When items reside in a Curriculum, they may have a Retraining Period associated with them as well, which requires Users to complete the training on a recurring cycle in order to maintain Curriculum completion (compliance).

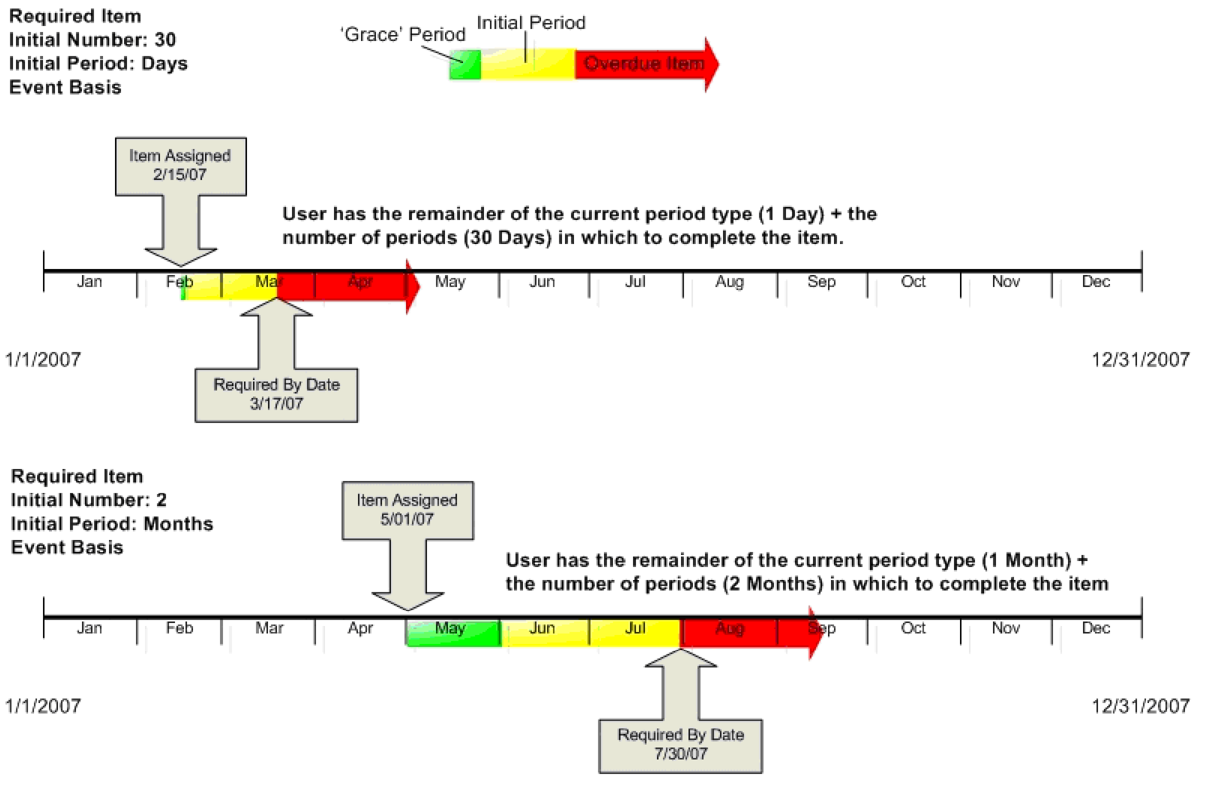
There are two types of period basis settings to choose from: **Event Basis** and **Calendar Basis**. Although no configuration setting must be determined to use either of the calculation methods, it is best that all learning administrators understand how they work:

The **required by** date is always calculated based upon the **assignment date** (for initial period) or the completion date (for retraining period). It is a common misconception that SuccessFactors allows administrators to base the required by date calculation from some other date, such as employee hire date.

Event Basis

Based upon the assignment date (or completion date for a retraining period) the User has X number of periods in which to complete the item, before it becomes overdue (item expiration email sent to User and supervisor, alert on home page). **The User always has the remainder of the current period type (e.g., 1 day, 1 week, 1 quarter, etc) + the number of periods defined.**

Event Basis Initial Period Examples:

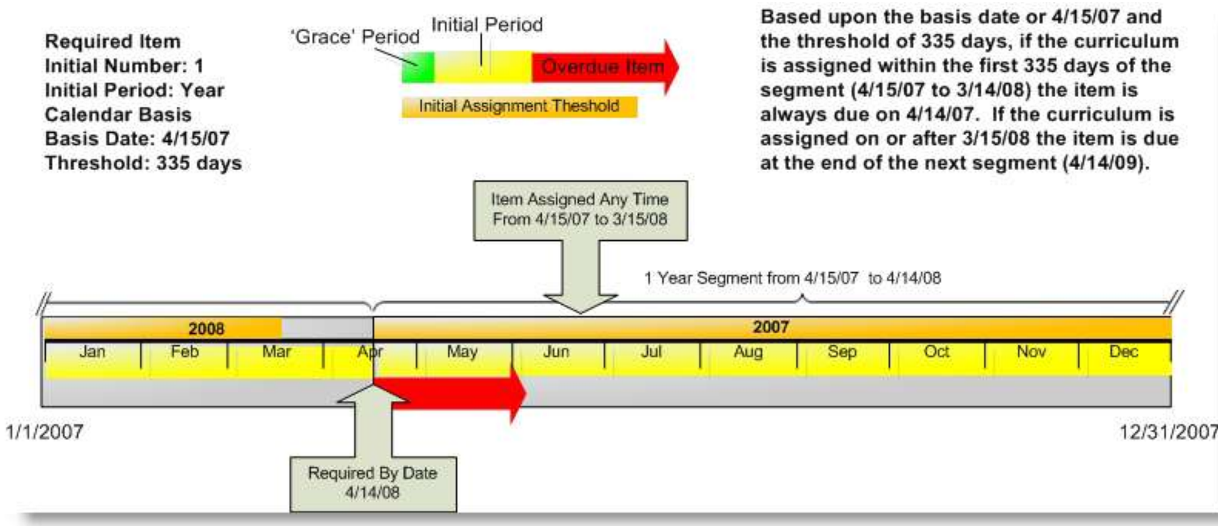


Calendar Basis

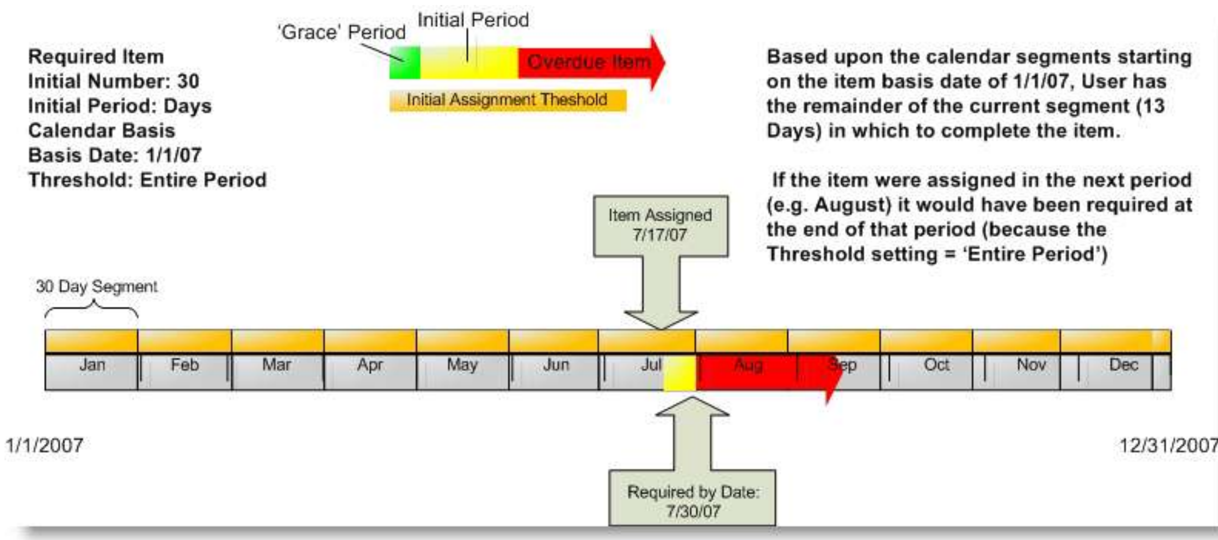
Calendar based intervals **rely upon a Curriculum** assignment to calculate properly (required items with calendar based intervals will always have a default required by date equal to the assignment date). At the Curriculum record level, a **basis date** is set (or the global default accepted – see section 12.1.1). Starting on the basis date, the calendar is divided into segments, determined by the initial (or retraining) number and period (e.g., 30 Days, 2 Months, 1 Quarter, etc.).

An additional parameter called **Initial Assignment Threshold** controls the 'Grace Period' when using Calendar Basis. If the item is assigned via a curriculum during the initial threshold, the item is due at the end of the **current** period in which it was assigned. If assigned after the initial threshold, the item is due at the end of the next full period.

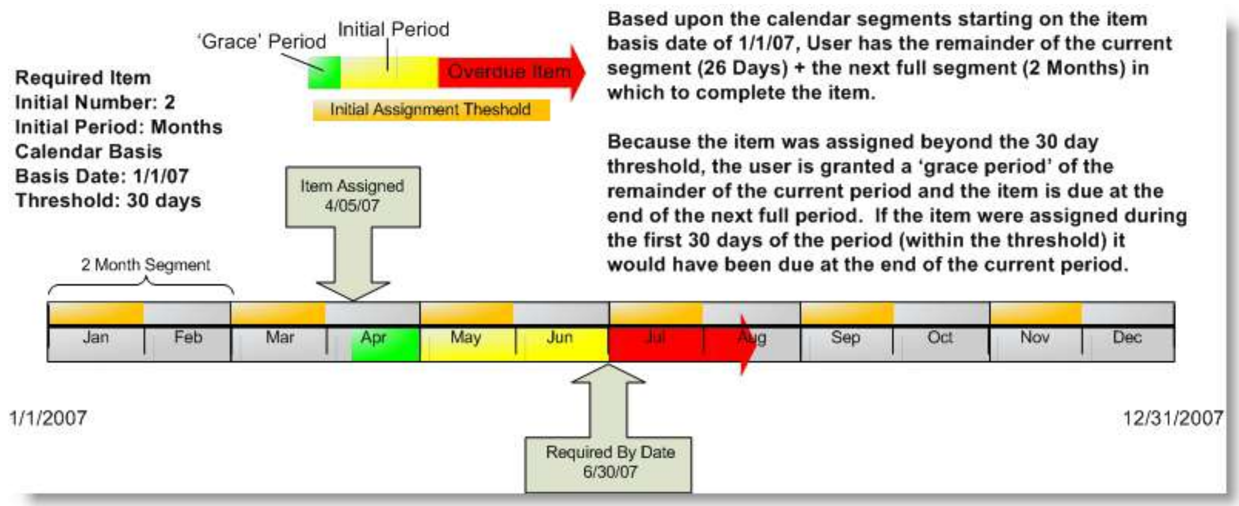
Calendar Basis Initial Period Example 1:
"Static" Required by Date



Calendar Basis Initial Period Example 2:
Curriculum Assigned Within Initial Threshold (Threshold = Entire Period)



Calendar Basis Initial Period Example 3:
Curriculum Assigned Outside of Initial Threshold



Notes

3.1.17 Item Substitute Relationships

Substitute relationships provide 'for credit' completion of Items based on the completion other Items. When a learning event is recorded for an item which has a substitute, both items are marked as complete for the User(s). The Force Credit option, when unchecked, results in substitute learning events recorded for Users only if the substitute item is on the learning plan of the User(s). This way, only the Users who have the substitute assigned to them receive credit. It is important to note that substitutes do not work with requirements. For example, if a user completes A and gets credit for B and B is part of an item pool, it does not count towards the total items needed.

If using substitute relationships between Items, it is recommended that a 'substitute' or 'collateral credit' Completion Status (Section 3.1.4) is created for every Item Type. This allows the proper documentation in User's Learning History of completion of an alternate Item which grants credit for another. (E.g., User completes Item A, which results in a for credit completion of Item B. The *for credit* status associated with Item B refers to 'Credit by Alternate Course Completion.')

Also, setting the **Effective Date** on an Item Substitute relationship allows for granting 'retroactive' credit for completion of an item. (E.g., User completes and Item A in Oct 2005. Admin adds Item A as substitute for Item B today with Effective Date of Sept 30 2005. User automatically receives credit for Item B because he completed it after the Effective Date).

Notes

3.1.18 Item Prerequisite Relationships

Prerequisite relationships between items prevent User action until all prerequisite items are completed successfully. Users cannot launch online content or register in Scheduled Offerings of items for which they have not completed the prerequisite items. There are no 'OR' relationships between prerequisites – all items listed on the Prerequisites Tab of an item must be complete. There is one exception to this rule, configured as a global User Setting (section 0) which allows Users to register in Scheduled Offerings of items with prerequisites if they are also registered in an offering of the prerequisite and it occurs before the subsequent offering.

Notes

3.1.19 Minimum Registration

Instructor led and blended items may have a minimum (and maximum) registration set at the Delivery Data Tab. These settings are inherited by new Scheduled Offerings created of the item. Minimum registration has added functionality. Users have the ability to 'request schedule' if an item on their learning plan or in their catalog has no Scheduled Offerings, or the available offerings do not meet their needs. When the number of requests equals the minimum registration number, an email (Item Scheduling Demand) is sent to the contact address listed on the item Design Data tab. If the Users are registered in an offering they are removed from the request list automatically, and as others request an offering, the email may be triggered again when the threshold is met. The Item Scheduling Demand APM must be running for this email to be triggered. (See Section 14.1.13)

3.1.20 Item Custom Columns (Custom Fields)

Custom columns allow administrators to collect and track information on items that may be unique to an organization and are not captured elsewhere on the item record. Custom columns are searchable criteria and therefore add another useful dimension to item records.

System Admin > Custom Columns > Item

Label	Col #	Referenced	Ref. ID Value or Field Description
Regulatory	*010*	*Y*	*Y/N*

Notes

3.2 Questionnaire Surveys (Item Evaluations)

Three levels of evaluation are captured in the TMS: 1) User Satisfaction, 2) Mastery of Content, and 3) Application of Learning. Surveys can be created for User Satisfaction, and the Application of Learning to evaluate the success of a given learning activity. Question types for surveys include Multiple Choice (checkbox), Rating Scale (uses existing competency rating scales), Single Choice (radio button) and Open Ended.

Surveys may be configured to be anonymous and can be required for Item completion (the Learning Event which triggers survey assignment is not finalized until the survey is completed by the user). Notifications are configurable at the survey level and support attachments.

One Item Evaluation: User Satisfaction (Level 1) and one Follow-up: Application of Learning (Level 3) Evaluation may be associated with an item. Learning Evaluation: Mastery of Content (Level 2) is addressed through the use of SuccessFactors Exams. If an exam is associated as online content (Online settings tab of the item) it may be flagged as a Pre-test or Post-test. This enables user performance on pre- and post-evaluations to be compared in a SuccessFactors report (Level 2 Evaluation Report).

Surveys must be associated with one of two levels: Item Evaluation: User Satisfaction (Level 1) or Follow-up Evaluation: Application of Learning (Level 3). Level 1 Surveys are automatically assigned to users when a learning event is recorded for the item (and the completion status is configured to allow the use of the user satisfaction survey). Level 3 surveys are automatically assigned to users and/or their supervisors after a pre-determined amount of time has passed since the learning event was recorded for the item (and the completion status is configured to allow the use of the application of learning survey). After Questionnaire Surveys are created they are associated with Items on the Evaluations tab. Questionnaires can utilize the competency rating scales found on page 55. An automatic process (see page 124) must run in order to assign the follow-up surveys and notify the users and/or supervisors.

Use the table below to document naming conventions for new surveys:

Learning > Questionnaire Surveys

Survey ID (30 Char)	Survey Name (300 Char)	Level	Anon?	Days to Complete	Description (2000 Char)	Domain
HR_CourseEval	*HR Course Evaluation*	*1*	*Y*	*7*	*2Char Dept_SurveyTitle*	*ABC*
NA-IT-SEC-L2Survey	*North America IT Security Level 2 Survey*	*2*	*N/A*	*6 months*	*2CharRegional Office ID-3Char DeptID-3Char Subject-SurveyTitle*	*DEF*

Notes
Discuss the use of rating scales in questionnaires. If needed go to competency section for creation of rating scale.

3.3 Curricula

Curricula have several purposes in delivering and tracking training in SuccessFactors Learning. Used as a compliance tool, administrators can track completion of a series of items and requirements (electives) as a whole. Standard reports are available that detail all of the Users who are assigned a Curriculum, its completion status, and the completion status of all the items and requirements within. The most efficient assignment methods (assignment profiles and Job Code/Curricula alignment) require the use of Curricula. Also, the use of retraining periods (see Period Based Assignments) and calendar basis requires items to be contained in a Curriculum.

Curricula may contain items, requirements and sub-Curricula. Depending upon the Curricula settings, different entities within the Curriculum must be complete for the Curriculum to be complete for a User. Curricula may also be published to catalogs which makes them available for User's to self-assign. Unlike self-assigned free-floating items, items within a self-assigned Curriculum maintain the assignment type (required, optional, etc) specified in the Curriculum record.

Example of Curricula (Naming convention)

Curriculum ID (30 char)	Title (50 Char)	Description (2000 char)	Domain

Curriculum ID (30 char)	Title (50 Char)	Description (2000 char)	Domain
ALL_NHO_ALL_Y2009	*New Hire Orientation for All Employees*	*ALL = All Domains NHO = NHO curriculum ALL = Audience Y2009 = Year*	*ABC*

Notes

3.3.1 Curriculum Status

A status of "Complete" is issued to the Curriculum when any of the following occur:

- All effective, required items and requirements are complete and all sub-Curricula are complete.
- The effective date of all required items and requirements is in the future.
- Some of the required items and requirements are complete and the remaining required items and requirements have an effective date in the future.

A status of "Incomplete" is in effect when any of the following occur:

- A new Curriculum is assigned to Users and the effective date for any required items or requirements is in the past.
- Any effective, required item or requirement has not been completed.
- A completed item or requirement has a retraining period and the required by date is in the past.
- The Curriculum is modified with a new or revised item and the effective date is in the past.

There are three date settings associated with items when used in Curricula: initial period, retraining period and effective date. The initial and retraining period set at the item record level is inherited when the item is added to a Curriculum and may be modified per Curriculum. This will not change the default at the item level. Effective date is applied only to required items within the Curriculum, and essentially determines 'when' the item is required for Curriculum completion. For example, in an existing Curriculum that is already assigned to Users and potentially already complete by some, administrators may want to add a new item to the Curriculum, but set the effective date to the future so Users have time to complete this item and remain compliant until that date. After the item becomes effective, it is required for Curriculum completion.

The chart below illustrates item date settings in relation to item 'overdue status' and Curriculum completion status.

Item Date Settings and their Effect on Users

Date Setting	Item Overdue Status Email to User and Supervisor ! User Home Page Alert	Curriculum Completion Status Incomplete Complete
Initial Period	✓	
Item Initial Period determines Required By Date. Overdue items trigger email and home page alerts.		
Retraining Period	✓	✓
Item Retraining Period determines Required By Date. Overdue items trigger email and home page alerts. Items within curricula with overdue retraining periods trigger curricula expiration (curricula marked incomplete).		
Effective Date		✓
Effective Date determines when an item within a curriculum is required for curriculum completion. If effective date for an item in a curriculum is in the future, it does not factor into curriculum completion status. Effective date does not trigger item overdue status.		

Notes

3.3.2 Curriculum Type

Curriculum Type is a way of categorizing Curricula and is a searchable criterion for administrators. Below is a list of Curriculum types chosen by <Customer Name>.

References > Learning > Curriculum Type

Curriculum Type ID (30 char)	Description (40 Char)
HEALTH	*Health and Safety*
HR	*Human Resources*
PDEV	*Personal Development*
SAFTY	*Safety*

Notes

3.3.3 Curriculum Force Incomplete

Used only with Curricula in conjunction with 'not for credit' completion statuses, force incomplete sets the User's Curriculum Status based on the last recorded Learning Event for the Item. Example: User completes Curriculum once, and later an Item failure is recorded. The Curriculum becomes incomplete based upon that recorded failure. If another 'for credit' Learning Event is recorded, the Curriculum becomes complete again.

Example of the use of Force Incomplete:
A User is 'released to task' (employee is granted access to perform a task because of successful Curriculum completion). If the User does not perform the task to expectations, specifications, etc, an Admin may record a Not-For-Credit Learning Event (No Longer Able to Perform Task) for the User. When Force Incomplete is enabled, the User's Curriculum becomes incomplete regardless of the Next Action Date for the Item.

Notes

3.3.4 Item Sequence

Sequencing is only used in conjunction with the Curriculum Scheduling admin tool. It is not the order in which Users must complete the items within a Curriculum. It provides the scheduling tool the order in which new Scheduled Offerings of the items within the Curriculum are scheduled.

Notes

3.3.5 Curriculum Custom Columns (Custom Fields)

Custom columns allow SuccessFactors administrators to capture additional information about organization records. Use the table below to list curriculum custom columns. (Column numbers are usually listed in increments of 100 to allow for future custom columns within the range.)

System Admin > Custom Columns > Organization

Label	Col #	Referenced	Ref. ID Value or Field Description
HQ Requirements	*100*	*N*	*Headquarters Curriculum*

Notes

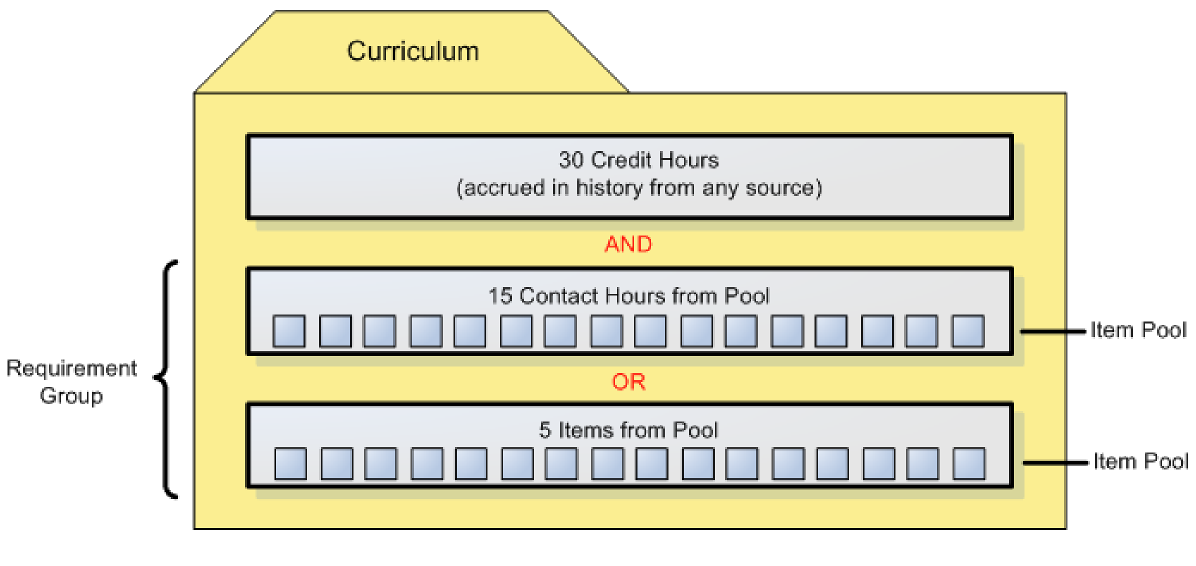
3.4 Requirements

Requirements are entities that extend the use of Curricula and items by offering Users choices of which training to complete to satisfy the Curricula. Users are required to complete a specified number of items and/or hours (of a certain type) to complete a requirement. The choices may be in the form of an item pool or from all available items in the Users' catalog or learning plan. Requirements, like items, may have initial and retraining periods which determine overdue status, and effective dates which determine when the requirement is required for Curriculum completion. If requirements are added to a Curriculum and made effective, all must be complete for a User to achieve Curriculum completion. However, if the requirements are grouped, an 'OR' relationship is created. Any of the requirements completed within a group satisfies the group, and if there are no items or sub-Curricula, the Curriculum is complete.

There are three types of requirements:

- Number of hours (of a specified hour type)
- Number of hours (of a specified hour type) from an item pool
- Number of items from an item pool

Requirements with item pools make item choices available to Users, however, the items must reside in catalogs assigned to the User for the User to launch online content or register for Scheduled Offerings of those items (the items in the pool do not display on the To-Do list until the user navigates to the curriculum requirement and manually selects the item.).



3.5 Catalogs

Catalogs control which items and Curricula Users can self-assign, and limit the Scheduled Offerings in which Users may self-register. Catalog access is transparent to the Users, in that one or many catalogs may be assigned to a User – but they cannot determine this via the User interface. The Catalog has search and link functionality and is located about Easy Links on the User interface. Users only see the subject areas for the items assigned, the items, and the Curricula which reside in all the catalogs. The Link will bring the user to a view of the Browse catalog form. The user can also search from here, or go to the Advanced Search area or the Calendar of Offerings area. The user can click on 'Search' to return to the browse form at any time. Catalogs are assigned via assignment profiles and therefore can be assigned to almost any unique population of Users. For example, a general access catalog may be assigned to all employees while another catalog may be assigned to all the members of a specified organization. Catalogs may be even be assigned to Users with certain Job Codes in common.

The table below identifies which catalogs <Customer Name> may create and the User populations who should receive the catalog assignment. Assignment profiles must be created that target the User populations which need access to the catalogs.

Learning > Catalogs

Catalog ID (30 Char)	Assigned to	Description (100 Char)	Domain
FINANCE	*Users in the FIN organization and all its child orgs*	*All Finance Related Items, Curricula and Scheduled Offerings*	*ABC*
GEN	*All Users in all domains*	*General Access*	*DEF*

Notes

3.6 Instructor

Instructors are unique entities in that they represent people, but do not have login accounts in the TMS but can be related to existing User account in the system. The relationship between an instructor and a user can be created at either the instructor or the user record under the summary tab of each record.

When associated with Scheduled Offerings, instructors receive email notifications and also may receive notifications when the roster or Scheduled Offering segments change. Instructors often represent training vendors, as the organization may not track the individual delivering training, but wish to notify the vendor when changes are made.

To help administrators find instructors for Scheduled Offerings of items, instructors may be authorize to teach those items. The scheduling module in SuccessFactors warns administrators who attempt to schedule unauthorized instructors. Instructors may also be identified as proctors for online exams and administrators may generate proctor codes which unlock exams for Users on specified calendar days. Below are example instructors and discussion on how instructor records will be created by <Customer Name>.

Learning > Instructors

Example Instructor ID (30 Char)	First Name (50 Char)	Last Name (50 Char)	Email Address	Authorized to Teach	Domain
938475 (Employee ID)	*Jennifer*	*Stuart*	*jstuart@corphq.com*	*COURSE-93934-rev1*	*ABC*

Notes
If <Customer Name> is using VLS, include the VLS information in this section. Will user records be associated with instructor records?

3.6.1 Instructor Custom Columns (Custom Fields)

Custom columns allow administrators to collect and track information on instructors that may be unique to an organization and are not captured elsewhere on the instructor record. Custom columns are searchable criteria and therefore add another useful dimension to instructor records.

System Admin > Custom Columns > Instructor

Label	Col #	Referenced	Ref. ID Value or Field Description
MS Office SMI	*010*	*Y*	*Y/N*

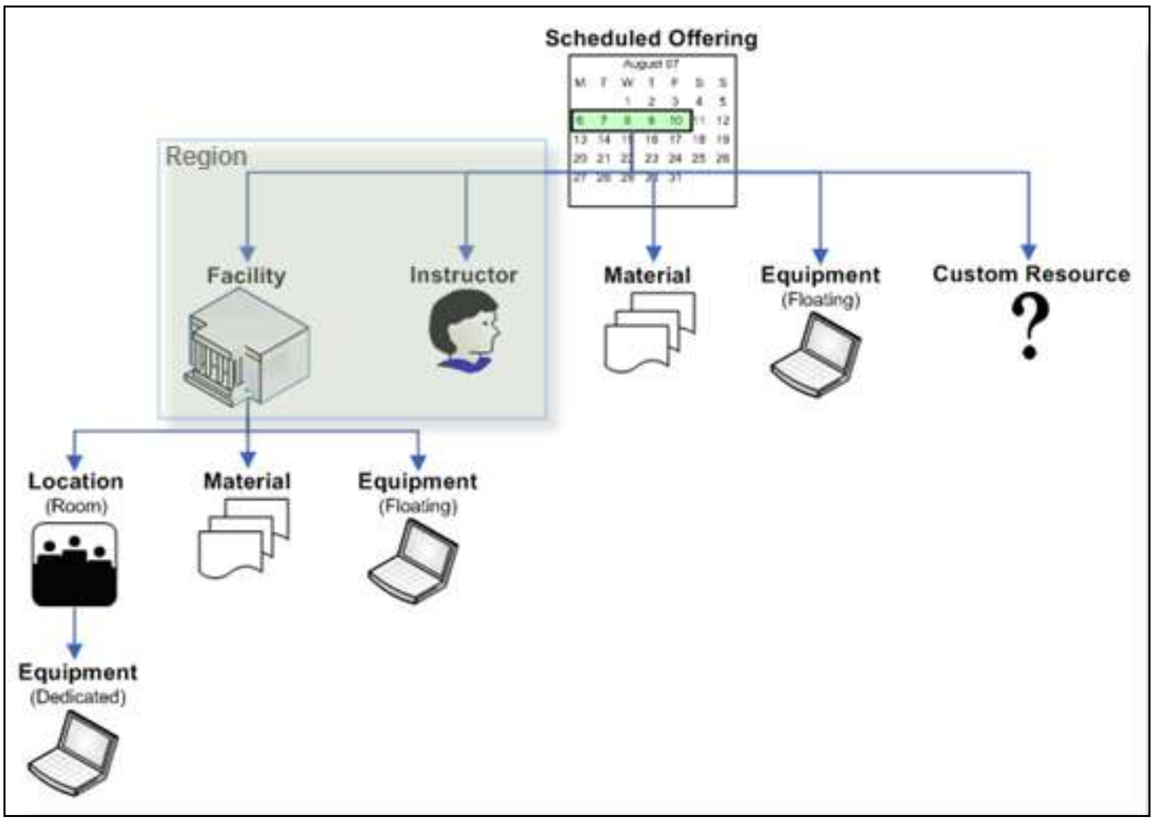
Notes

4) Physical Resources

Scheduled offerings (section 5.1) use resources to track physical entities associated with delivering instructor led training. These resources include locations (room level), facilities (building level), equipment and materials. Custom resources may also be created by administrators and applied to Scheduled Offerings. Resources may be used as part of a schedule conflict management solution as SuccessFactors helps administrators avoid overbooking instructors and locations. Costs associated with resources may also be tracked, and therefore the overall cost of instructor led delivery is derived. Resources also help communication with Users, as Scheduled Offering registration emails contain resource information such as the instructor, location and facility details.

New in 6.3, the resource search results provided during the scheduling process have been enhanced to display the resource's availability. The availability statuses include "not available", "available for entire scheduled offering", "available for segment", or "available for specific segments". This makes it easier to identify available instructors and locations, especially for those offerings that span multiple days or weeks.

The diagram below illustrates the relationship between Physical resources, Instructors and Scheduled Offerings:



4.1 Facility

Facilities usually represent the buildings in which training is delivered. Facilities contain locations, and are associated with regions which allow Users to search for offerings in the region in which they reside. The name of the facility can be included in the notification to the registered user. Below are example facilities and discussion on how facilities will be entered into SuccessFactors by <Customer Name>.

References > Physical Resources > Facilities

Facility ID (30 Char)	Description (200 Char)	External Facility (Y/N)	Work Week Profile ID	Holiday Profile ID	Time Zone	Domain
HQ	*Headquarters*	*N*	*5DAYWEEK*	*US HOLIDAYS08*	*American/New York*	*ABC*

Notes

4.2 Location

A location usually represents rooms within facilities. SuccessFactors manages schedule conflicts by warning administrators before double-booking locations. Locations are also an important means of notifying Users where to attend instructor led training and non-training events. Below is a list of example locations and discussion on how <Customer Name> will create and manage locations.

4.2.1 Location Type

Location types may be specified at the item record level so administrators who schedule the item can better choose the location for the training or event. Location types do not restrict the scheduling administrators; rather suggest the type of room the training is designed for. Below is a list of location types chosen by <Customer Name>:

References > Physical Resources > Location Types

Location Type ID (30 Char)	Description (40 Char)
CLASSROOM	*Classroom*
CONFERENCE	*Conference Room*
LAB	*Laboratory*
VIDEO	*Video-enabled room*

Notes

4.2.2 Locations

References > Physical Resources > Locations

Location ID (30 Char)	Description ¶(40 Char)	Location Type	Facility	Max Capacity
HQ-MAINCONF	*Headquarters Main Conference Room*		*HQ*	

Notes

4.3 Work Week Profile

Each facility may have a work week profile associated with it, which determines available scheduling days. SuccessFactors warns administrators when attempting to schedule on a non-working day, but administrators may choose to override the warning. If a facility has no work week profile, the system assumes a normal five-day work week when scheduling. Below are work week profiles chosen by <Customer Name>:

References > Calendars & Time > Work Week Profiles

Work Week Profile ID (30 Char)	Description (40 Char)
5 DAY WEEK	*Standard US 5-day Workweek (Mon – Fri)*

Notes

4.4 Holidays

Holidays must be added to SuccessFactors and maintained accordingly as they reference exact dates. One approach is to update holidays yearly – another is to create enough references for upcoming years, provided the references have unique IDs.

References > Calendars & Time > Holidays

Holiday ID (30 Char)	Description (40 Char)	Date
20090101	*New Year's Day*	*Jan 1, 2009*

Notes

4.5 Holiday Profile

Facilities may have holiday profiles associated with them which serve to alert administrators attempting to schedule offerings on those days. Administrators may always proceed through a holiday warning. Holiday records must be created and maintained to reflect the next year in which training may be scheduled. Below are example holidays and discussion on how holidays will be entered into SuccessFactors by <Customer Name>.

References > Calendars & Time > Holiday Profiles

Holiday Profile ID (30 Char)	Holiday ID (30 Char)	Date	Description (40 Char)
2009HOLIDAYS	*20090101*	*Jan 1, 2009*	*New Year's Day*

Notes

4.6 Materials

Materials are consumable supplies associated with the Scheduled Offering delivery. Materials may contain inventory information to facilitate reorder processes. Materials, like other resources may also have costs associated with them which calculate according to the chosen measure into the cost of Scheduled Offering delivery. Material quantity on hand per Facility does not deplete automatically when materials are used by Scheduled Offerings. Administrators must manually adjust the material quantity. Below is a list of example materials that <Customer Name> may create along with discussion of how materials may be created and used.

References > Physical Resources > Materials

Material ID (30 Char)	Description (40 Char)

Notes

4.7 Equipment

Equipment represents non-consumable goods associated with training delivery, including cameras, computers and projection systems. Equipment may be associated directly with locations, so if the location is booked for a Scheduled Offering, the equipment is also booked. Equipment may also be marked with a status indicator, such as 'out of service.' Below are examples of equipment records and discussion on how <Customer Name> may use equipment.

4.7.1 Equipment Type

Equipment type is a categorization of equipment, which allows administrators to search for equipment by type. Below is a list of equipment types chosen by <Customer Name>:

References > Physical Resources > Equipment Type

Equipment Type ID (30 char)	Description (40 char)
CAMC	*Camcorder*
DIGCAM	*Digital Camera*
DRYM	*Dry Erase Markers*
DVD	*DVD Player*
INET	*Ethernet Connection with access to the Internet*
LAN	*Ethernet Connection (LAN access only)*
LAP	*Laptop PC*
LCD	*LCD Projector*
MAC	*Macintosh/Apple Computer*
MARK	*Markers*
MIC	*Microphone*
NOTE	*Large Notepad*
OVER	*Overhead Projector*
PC	*Desktop PC*
PHONE	*Phone Line*
POD	*Podium*
TV	*Television*
TVDVD	*TV/DVD Combo*

Equipment Type ID (30 char)	Description (40 char)
VC	*Video Conferencing Equipment*
WB	*White Board*

Notes

4.7.2 Equipment Status

Equipment statuses help administrators track equipment that may be on loan or in need of repair, and prohibit some equipment from being scheduled. Below is a list of equipment statuses chosen by <Customer Name>:

References > Physical Resources > Equipment Status

Equipment Status ID (30 char)	Can Be Scheduled	Description (40 char)
AVAIL	*Y*	*Available for Use*
REPAIR	*N*	*Under Repair*

Notes

4.7.3 Equipment

References > Physical Resources > Equipment

Equipment ID (30 Char)	Description (40 Char)	Equipment Type	Equipment Status	Assigned Location	Assigned Facility

Notes

4.8 Regions

Regions are associated with User, facility, and instructor records. When Facilities are associated with Regions, Users have the ability to locate Scheduled Offerings based on their Region. Region can be included as a user attribute in assignment profiles. Regions are defined in section 2.1.14 of this document.

Notes

4.9 Custom Resources

To capture any other resources that do not qualify as instructors, locations, facilities, equipment or materials, custom resources may be created. Like other resources, they may have costs associated with them that factor into the cost of Scheduled Offering delivery. Below are custom resources <Customer Name> may create.

References > Physical Resources > Custom Resources

Custom Resource ID (30 Char)	Description (40Char)
Mary's Cafe	*Caterer*

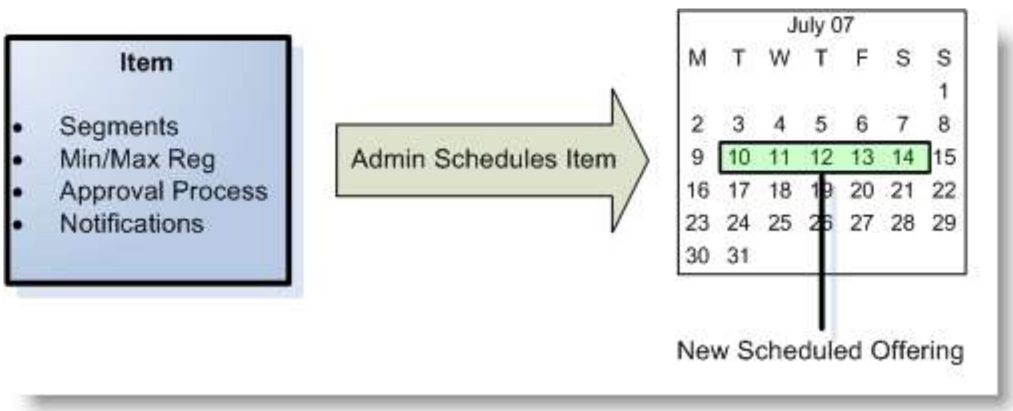
Notes

5) Scheduling

Instructor led and blended items must be scheduled to enable registration features, notifications and cost calculation of training or event delivery. Scheduled offerings may be made available for User self registration if the item and offering reside in a catalog assigned to the target audience. Administrators may control the Scheduled Offering registration list, including enrolling Users and changing any enrollment statuses.

The SuccessFactors scheduling assistant provide administrators with the ability to determine which resources (instructors, locations, equipment) are available for the desired schedule date in a calendar view. Instructors are checked for item authorization and the facility holiday and work week profile. Once scheduled, the Admin may modify notifications associated with the offering, update the scheduled segments, input contacts (other Users or instructors who should receive emails when the offering duration changes or Users self-register), and adjust costs and pricing. Scheduled offerings sometimes represent training or meetings delivered virtually, using SuccessFactors Learning VLS connector if available. Virtually delivered Scheduled Offerings may not have a facility associated with them.

New in scheduling, the admin can display total segments attended for each enrolled user (Registration Tab > Segments) and can record segment attendance and comments for enrolled users (Scheduled Offering > Segments tab).



5.1 Schedule Offering Attributes

5.1.1 Schedule Offering ID

The schedule offering ID is an auto-generated sequential numeric ID. It cannot be manually entered or modified once created.

5.1.2 Schedule Offering Status

Like other records, Scheduled Offering may be set to active or inactive. Inactivating Scheduled Offerings hides them from User view and is typically used after an offering has been delivered and closed. Closing a Scheduled Offering is used to process financial transactions (calculating costs of delivery).

5.1.3 Schedule Offering Time Zone and Show in this Time Zone Setting

An important consideration to make is how Users and administrators view the time of Scheduled Offering delivery. Both Users and Admin have a time zone preference setting which they may be able to update. In these preferences is the ability to 'always show Scheduled Offerings in this time zone.' This allows Users and Admin the option to convert the delivery time into the preferred time zone. If they have not chosen this option, administrators creating the offerings may choose to 'show in this time zone,' which forces the time zone of delivery to be used in display. This setting is typically chosen for offerings being delivered at facilities (Users especially may be traveling to the facility). For virtually delivered courses, the Users may prefer to view the Scheduled Offering according to their time zone preference.

Notes
Identify the time zone configuration options to <Customer Name>

5.1.4 Approval Process ID/Approval Required

Like items, Scheduled Offerings may have approval processes associated with them. If an approval process is referenced and the 'approval required' checkbox is enabled, Users will be forced to submit a request for approval when attempting to self-register. Administrators and Supervisors may always register Users without approval.

5.1.5 Registration Cut-Off Date

If self-registration is enabled, the Admin may choose to determine a registration cut-off date, which prohibits Users from self-registering or withdrawing from the Scheduled Offering after the specified date and time. Administrators may always register Users after this date and time, with a system warning.

5.1.6 Minimum and Maximum Registrations

At the offering level, minimum registration has no effects and is referential and can be used to search for scheduled offering that do not have the minimum enrollment met. Maximum registration prevents Users from self-registering with a status of 'enrolled' if the maximum as been met. Users have the option of registering with a status of 'waitlist' and are added to the roster as such. If set at the offering level, auto-fill registration automatically moves Users from the waitlist into the next available seat if another User withdraws. Administrators may manually change any User's registration status at any time.

5.1.7 Registration Statuses

Users registered in Scheduled Offerings may have one of the default registration statuses (ENROLL, WAITLIST, PENDING, CANCELLED) or any additional registration statuses created as a reference. E.g., if a User cancels because of a mission related reason, the registration status may be changed to CANCEL-MISSION. This allows administrators to report upon all the mission related cancellations. All new registration statuses must be associated with a registration type, which determines the type of action the status triggers (E.g., CANCEL-MISSION is a Cancel type, which means the user is un-enrolled from the offering if this status is chosen.)

Registration Status ID (30 Char)	Description (40Char)	Registration Type
CANCEL-MISSION	*Mission related cancellation*	*Cancelled*

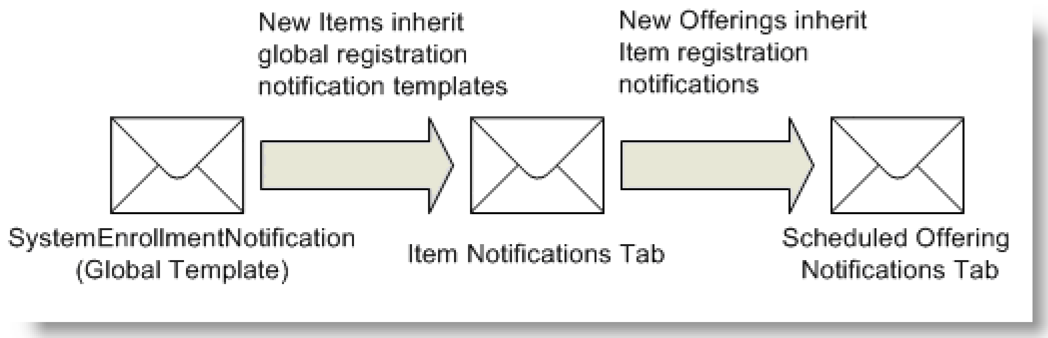
Notes

5.1.8 Self-Registration

Enabling self-registration allows Users to register for Scheduled Offerings, provided those offerings are in catalogs assigned to the target Users. Careful consideration of catalog creation allows administrators to restrict the Users who may register in offerings of items. Scheduled offerings cannot reside in catalogs in which the item does not reside. Users cannot self-register in offerings if the registration max has been met (they will have the option to waitlist), or if the registration cut-off date and time has passed.

5.1.9 Notifications

Administrators may modify the email notifications associated with Scheduled Offerings at the global level (see section 17.2), the item level, and the Scheduled Offering level. Email notifications triggered by Scheduled Offering actions include registration, User enrollment status change, Scheduled Offering segment change and offering cancellation. Administrators may attach a file to the emails that are delivered by the system.



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Notes

5.1.10 Slots

Administrators may reserve slots for Users within specific organizations. If self-registration is enabled, Users in the exact organization occupy the slot instead of the rest of the available seats. Sometimes administrators use slots to preserve an even distribution of Users in a Scheduled Offering. As a group of slots is associated with only one organization, it is important to understand how the organization structure may limit the use of this feature. For example, if the organization structure is deep, organizations may contain a relatively small number of Users and therefore slots must be created for each unique organization targeted. (Administrators cannot associate ‘rolled up’ organizations, or more than one organization with a group of slots).

Notes

5.1.11 Contacts (Others)

When Users self-register in Scheduled Offerings, all Users and instructors listed on the Contacts Tab receive the registration notification. Contacts also receive notification when the Scheduled Offering segments change. Administrators registering Users in Scheduled Offering have the option to notify the contacts.

5.1.12 Cancelling a Schedule Offering

Scheduled offerings that have not yet occurred may be cancelled by the Admin. This triggers an assistant and allows the Admin to move enrolled and waitlisted Users to the item request list (so they may be re-enrolled in another offering of the item) and capture any costs incurred. Notifications are sent to Users and the offering may be inactivated to prevent Users from self-registering.

Notes

Notes

5.1.13 Closing a Scheduled Offering

Unlike offering cancellation, closing a Scheduled Offering may only occur after the offering has been delivered. This process is solely to finalize costs associated with the Scheduled Offering (if associated resources and item has costs) and charges the appropriate account code. If commerce features are not in use, administrators need not close any Scheduled Offerings. Closing a scheduled offering also prevents any additional modifications to the roster.

Notes

5.1.14 Scheduled Offering Custom Columns (Custom Fields)

Custom columns allow administrators to collect and track information on scheduled offerings that may be unique to an organization and are not captured elsewhere on the scheduled offering record. Custom columns are searchable criteria and therefore add another useful dimension to scheduled offering records.

System Admin > Custom Columns > Scheduled Offering

Label	Col #	Referenced	Ref. ID Value or Field Description
Regulatory	*010*	*Y*	*Y/N*

Notes

5.2 Schedule Blocks

Schedule blocks are non-item Scheduled Offerings. They are intended to block resources from use in other Scheduled Offerings. When creating a schedule block, administrators must choose from a list of schedule block ID's (reference values). Below are schedule block ID's chosen by <Customer Name>:

References > Learning > Schedule Blocks

Schedule Block ID (30 Char)	Description (100 char)
CONF	*Conference*
MTG	*Meeting*
OFSM	*Off-site Meeting*
VAC	*Vacation*

Notes

6) Competency Management

SuccessFactors uses the following Competency definition: "A measurable pattern of skills, knowledge, abilities, behaviors and other characteristics that an individual needs to perform work roles or occupational functions successfully". Competencies in SuccessFactors are used to measure a User's proficiency in the various components (i.e., knowledge, skills, abilities, and behaviors) necessary for successful job performance.

Competencies can be grouped into Competency Profiles and assigned to Users via the same methods in which Curricula (Learning) are assigned: Job Code alignment allows administrators to assign Competencies to Users with a common Job Code. Assignment Profiles can also assign Competency Profiles to Users based upon any matching attributes.

Using one of several assessment methods (self, supervisor, Admin, item-based, and 360-assessments, if licensed) Users may close Competency gaps. Once all of the Competencies within a Profile have zero gap, the Competency Profile is complete.

Notes

6.1 Competencies and Competency Profiles

6.1.1 Competencies

In SuccessFactors Learning, each Competency must be assigned its own unique identifier. The customer can define the naming convention for Competency IDs any way they choose. Some customers prefer to use a numerical naming convention, while others prefer to use the name of the Competency itself. Users will not be able to view Competency IDs when looking under the Competency assignments tab.

Performance > Competencies

Example Competency ID (30 char)	Example Competency Description (100 char)
CD_001	*Identifies professional skill areas to be developed.*
COMM_004	*Ensures that regular communication occurs based on the needs of the project or the individual.*

Notes

6.1.2 Competency Category

A Competency Category is a text label (e.g., "Teamwork, Engineering Team") that is used to group similar Competencies. Used in conjunction with 360° Multi-Rater Assessments and/or Performance Goals and Appraisals (both separately licensed), Competency Category allows administrators to group the presentation order of Competencies to Users.

References > Performance > Competency Category

Competency Category ID (30 char)	Description (100 char)
LEAD	*Skills associated with Leadership roles.*

Notes

Notes

6.1.3 Competency Type

By default, SuccessFactors comes with four Competency types: Skill, Attitude Knowledge and Ability. You may also create custom Competency types if those within the LMS do not meet the need of the organization.

References > Performance > Competency Type

Competency Type ID (30 char)	Description (100 char)
Behavior	*Competency represents employee behavior.*

Notes
Identify if there will be any Competency-Item relationships and rating scales developed

6.1.4 Competency Source

A Competency source typically identifies the origin of the Competency. You can use Competency sources to identify the developer or author of the Competency, the organizational or regulatory body that requires the Competency, or for some other type of information that you define to best suit your needs. A Competency source is not required when the Competency is created in SuccessFactors Learning.

References > Performance > Competency Sources

Competency Source ID (30 char)	Description (100 char)
INT	*Internally Developed*

Notes

6.1.5 Competency Explanation

A Competency explanation is an optional User facing field that further clarifies the Competency. Some models use Competency Description to capture this detail, but other require this additional field to list all the behavior indicators incorporated into the Competency.

6.1.6 Competency Rating Scales and Labels

All Competencies must have a Rating Scale associated with them, as this is how Users score the level of proficiency during and assessment. Best practice recommends the use of one Rating Scale for all Competencies, but this may vary from model to model. Rating Labels identify each level of the Rating Scale. Ratings can be used in Questionnaire Surveys (Item Evaluations). See page **Error! Bookmark not defined.Error! Bookmark not defined.** for Questionnaire Surveys.

References > Performance > Rating Scales

Competency Rating Scale ID (30 char)	Description (100 char)	Rating Label (30 Char)
3 Level	*3 Level Proficiency Scale*	
		1 = Needs Improvement
		2 = Meets Expectations
		3 = Exceeds Expectations

Notes

6.1.7 Competency Profiles

Competency Profiles provide a way to group Competencies into meaningful clusters. An example of a Competency Profile may be “Communication”. Within the “Communication” Competency Profile may exist Competencies such as Oral Communication, Written Communication, and Presentation Skills.

Note: When Competencies are added to Competency Profiles, Required Ratings must be entered, and the default Required Rating is always the lowest rating on the Competency’s assigned Rating Scale. It is important to consider what the Required Rating per Competency should be, as it affects whether a User is marked as proficient when an assessment is completed.

Performance > Competency Profiles

Example Competency Profile ID (30 char)	Job Code	Assignment Profile	Example Competency Profile Description (100 char)
CD			*Continuous Development*
COMM			*Communication Skills*

Notes

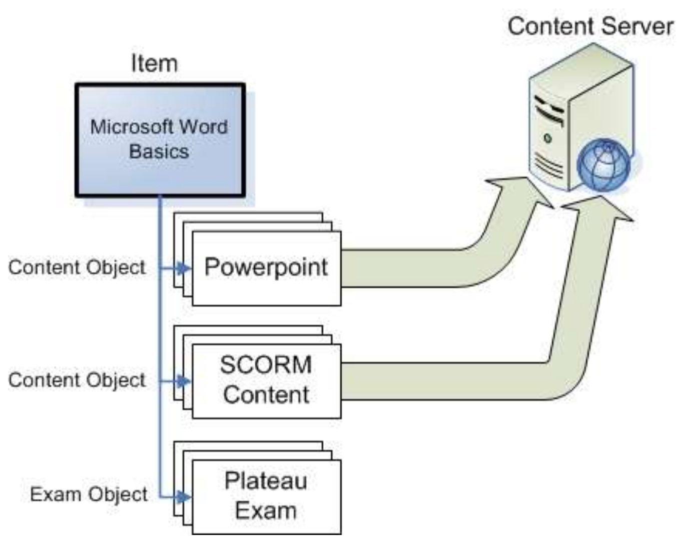
7) Online Content Management

Online learning refers to the electronic access of asynchronous training such as a slide show presentation, an audio or video presentation, a web-based exam, or a document (e.g., a Standard Operating Procedure manual). SuccessFactors Learning enables Users to launch online content directly from their Learning Plans, Catalogs or Curricula and can automatically record Learning Events for completed online Items.

7.1.1 Managing Online Content

Content Objects are the building blocks of an online Item. The Content Object contains the content type information which determines if it tracks using AICC or SCORM calls (or if it is non-tracking). The Content Object also contains the launch URL of the actual content residing on the content server. Online content does not reside within the SuccessFactors database, but on server that is accessible to the audience. SuccessFactors Exams are the exception as they are created in SuccessFactors and do not require uploading to a content server location.

The Item below has several Content Objects, one non-tracking (PPT), one tracking via SCORM, and another tracking via SuccessFactors Tracking functions. Simply put – the Item is the container of online content and is used to deliver course modules to Users, and the Content and Exam Objects are the references to that content.



7.1.2 Considerations

- WBT content files are not actually stored in the LMS. The AICC and SCORM importer only automatically creates the Content Object record information, not the actual content.
- SuccessFactors **v. 6.2** requires a Java Plugin of at least the following. Web Based content may not launch or track properly if an older version is used (especially affects SCORM content)

  — Sun Java 1.5 and 1.6 (latest versions)
- AICC and SCORM Content CANNOT pass a Non-Credited Completion Status (aka a "FAILURE")
- AICC and SCORM Assessments only track the User's MOST RECENT assessment scores. Score history and iteration information is NOT tracked.

- SCORM 2004 "User Interaction" data is stored as a CLOB in the SuccessFactors database. There are currently no SuccessFactors standard reports that can extract SCORM 2004 interaction data.
- Unless there is a specific need for the additional data tracked and communicated by SCORM 1.2 and SCORM 2004 data, your organization might consider using AICC content. There are often less issues (less likely a cross domain issue), and less impacted by JRE versions.
- SCORM content must be hosted behind the same DNS name as the SuccessFactors instance to avoid a "Cross Domain Issue." If content is hosted elsewhere, then there must be a reverse-proxy server, or a cross domain configuration in SuccessFactors for the content.
- SuccessFactors only supports the following tracking data for AICC/SCORM data.

  — **Completion** - Only at the Content Object level

  — **Score** - Only score at the Content Object level. Each new attempt overwrites the existing score value. This score is only available to administrators. It does not display in the user interface after completion of the course.

  — **Time spent** - Only at the Content Object level

  — **Bookmarking** - Yes

  — **Objective level Data** -Objective score and completion

  — **Interaction Data (i.e. Question level Data)** - Only supported for SCORM 2004 content
- The ability to "Review Content" from Learning History for courses that a User has already taken is ONLY available for AICC and SCORM content.
- Mastery Score - When Mastery Score is populated, it controls the passing score.

7.1.3 Mastery Score

Mastery Score may be configured at the Content Object level or specified at the Item record level (online settings tab). Instead of SuccessFactors interpreting the accepted object completion value, the score passed back to SuccessFactors determines whether the object is completed successfully, and therefore whether the item may be successfully completed. A specific SCORM or AICC content object can be considered completed once its mastery score has been achieved. The configuration done at the Item's Online Settings tab will override any setting done at the Content Object. If the content is SCORM, the settings found in the SCORM package will override any settings at the Item's Online Settings tab.

Note: When content is imported into the TMS the mastery score should, but does not always, automatically populate appropriately. For this reason, when troubleshooting for issues where content is not recording properly, you should verify that the mastery score exists in either the content object record or in the Item Online Settings Tab.

7.2 Content Types

As multiple content vendors and tools may be used in a single SuccessFactors implementation, it becomes important to maintain documentation of all types of online content. Below is a list of types of online content that <Customer Name> documented during workshops, along with notes detailing the extent of online content usage.

Provider or Tool	Standards	Hosted	Notes
Articulate (tool)	*SCORM 1.2*	*Internal*	*All internally developed web based training created in Articulate and exported as SCORM 1.2 conformant.*

Provider or Tool	Standards	Hosted	Notes
PDF Documents (tool)	*None*	*Internal*	*Non-tracking – may be marked as complete when launched.*
SuccessFactors Exams (tool)	*SuccessFactors Tracking*	*Internal*	*Settings vary per exam.*

Notes

7.3 Content Objects and Packages

Below are sample Content Objects using the naming convention decided upon in workshops:

Content > Content Objects

Content Object ID (30 Char)	Title (200 Char)
HR _BasicTraining_001	*New Employee Basic Training Module 1*

Notes

A content package is a group of Content Objects, and can be the result of importing a SCORM manifest which creates more than one Content Object and groups them in a package. Below are sample Content Packages using the naming convention decided upon in workshops:

Content > Content Packages

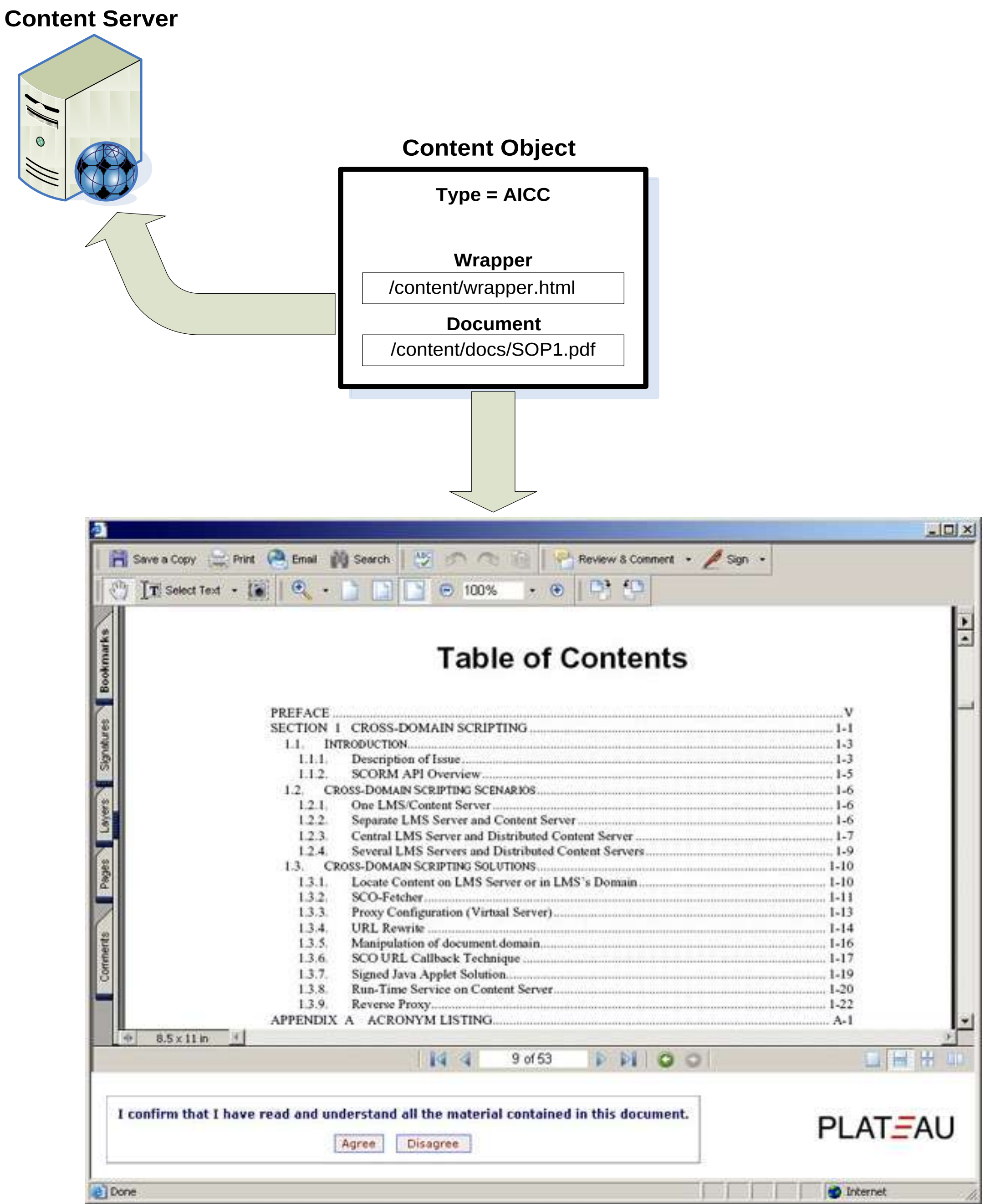
Content Package ID (30 Char)	Title (200 Char)
IT_Sec_2006	*2006 IT Security Awareness Courses*

Notes

7.3.1 AICC Document Wrapper

The SuccessFactors AICC Document Wrapper files encapsulate online documents into an HTML page. This "Wrapper" uses AICC standards to communicate with SuccessFactors Learning and record both the completion and the time spent in the content. Use the wrapper with content that does not contain any mechanism for communication with SuccessFactors (e.g., Adobe .pdf, MS Word .doc, etc).

An AICC Wrapper Content Object references a hosted Wrapper file (html) and a document and presents the document within the wrapper to the User. The wrapper is used to force acknowledgement before a Learning Event is recorded.



AICC Document Wrappers are available for download on the Content Integration Guide (http://content.plateausystems.com). They are easily modified with new logo, color scheme and acknowledgement statement, and come with complete instructions.

7.4 Documents

Documents in SuccessFactors are references to document locations, and may provide a URL for the user to launch a document via the User interface when associated with Items. When users access documents there is no tracking in SuccessFactors Learning. Documents are not 'uploaded' into the SuccessFactors database, but must reside in a location which is accessible to the user (intranet, document repository, LAN).

7.4.1 Document Types

Document Type is a way of categorizing documents and is a searchable criterion for administrators.

References > Learning > Document Type

Document Type ID (30 char)	Description (40 char)
MAN	*Manual*
OPS	*Operations Guide*
REF	*Reference Material*
REG	*Regulations Document*
SOP	*Standard Operation Procedure*
TEXT	*Text Book*

7.5 Objectives

Objectives are entities that link together SuccessFactors Exam Questions, Content Objects, Competencies and Items. Questions created with SuccessFactors Question Editor are always objective based, and these records are automatically created in SuccessFactors when questions are imported from PQE. Sometimes Exams test Users on objectives associated with the Content Objects in an Item. Depending upon the Exam settings, Users may receive credit (test out) of Content Objects if they complete an objective within an Exam. Conversely, they may lose previously earned credit for successfully completing Content Objects if they fail Exam objectives.

7.5.1 Objective Custom Field

Custom columns allow SuccessFactors administrators another option in searching for and reporting upon groups of objectives. Below is a list of Objective custom fields that will be created by <Customer Name>:

Content > Objectives

Label	Col #	Referenced	Ref. ID Value or Field Description
OSHA	*010*	*Y*	*Y/N*

Notes

7.6 Questions

Questions are typically created in SuccessFactors Question Editor and are presented to Users randomly in a SuccessFactors Exam. They are normally objective based, and may be therefore linked to Content Objects within the same Item.

7.6.1 Question Custom Field

Custom columns allow SuccessFactors administrators another option in searching for and reporting upon groups of questions. Below is a list of Question custom fields that will be created by <Customer Name>:

Content > Questions

Label	Col #	Referenced	Ref. ID Value or Field Description
Owner	*010*	*N*	*Compliance*

Notes

7.7 Exam Objects

Exam Objects are launch able online exams that use native SuccessFactors questions, created in PQE. Exam objects can be used in the Level 2 surveys. There are many important settings on the Exam Object record which determines its behavior, including requiring Instructor Proctor code to begin, allowing Users to stop and resume the exam, and setting or clearing Objective flags for other online content within same Item. Reports in SuccessFactors can supply and analyze all the exam results, User by User – or per Exam. This differentiates SuccessFactors Exams from third party SCORM or AICC exams, which cannot be used to generate question-level response data in SuccessFactors Learning.

7.7.1 Exam Custom Field

Custom columns allow SuccessFactors administrators another option in searching for and reporting upon groups of Exams. Below is a list of Exam custom fields that will be created by <Customer Name>:

System Admin > Custom Columns > Exam

Label	Col #	Referenced	Ref. ID Value or Field Description
Course #	*010*	*N*	*100-567*

Notes

8) SuccessFactors Mobile

As of 6.3.3, SuccessFactors Mobile allows employees and managers to access the talent management system via their mobile devices including the Android, Blackberry and iPhone. Users who login to SuccessFactors Talent Management from their mobile device will be able to perform the tasks below based on licensed modules and each user's workflows:

- View To-Do List
- View Item Details
- View Available Scheduled Offerings
- Launch online content*
  - AICC content
  - HTML web pages
  - PDF, Word, PPT files (as supported by the user's mobile device)
- Register/withdraw from Scheduled Offerings*
- View Learning Approvals
- Approve/Deny Learning Requests

*Commerce features are not yet supported on mobile devices.

8.1 Enabling SuccessFactors Mobile

Administrators can enable mobile access with a check box in the Global Variables page in System Administration. When enabled, the system will automatically detect that a user is accessing the login page from a mobile device and display the mobile-accessible version of SuccessFactors Talent Management.

Sys Admin > Configuration > Global Variables

	Default	Value
Enable SuccessFactors Mobile	N	Y/N

8.2 Enabling Content for Mobile Access

Each content object can be configured for mobile access by simply selecting a check box on the content object record. When mobile access is not enabled, users will see a note for the content indicating that it is not accessible on mobile devices.

Content > Content Objects > Summary

Notes

Additionally SuccessFactors supports mobile-specific versions of content: administrators can enter an alternate file path for content designed specifically for mobile devices. When users launch a content object from a mobile device, they will be presented with the content from the alternate file location.

Content > Content Objects > Launch Method

Notes

9) SF-182 Request External Learning (6.2.3)

This section will allow the administrator to choose fields that will display globally in the Standard Form -182 Request and Standard Form -182 Verification. Both forms are used by U.S. federal government clients. The SF-182 includes new functionality however, there are no new configurations required due to the enhancements. Please refer to the delta document for the improvements to the SF-182.

9.1 Request, Authorization, Agreement and Certification of Training

The following table indicates the configuration of the SF-182 external training request form. The configuration settings allow <Customer Name> to determine (1) which fields should be displayed, (2) which fields are mandatory, and (3) if the fields can be pre-populated with the User's information (only for certain fields and the data must exist in either the SuccessFactors standard fields or SuccessFactors custom fields).

Instructional Text for Section A:

Instructional Text for Section B:

Instructional Text for Section C:

Notes
Instructional Text box decisions: provide standard text from the SF-182 form itself (copy/paste) Could also include a document containing links for each of the components to provide specific instructions.

Note that "Custom/Reference" column is only available where noted unless the form is customized. Null indicates a blank field that the user must fill if required but will be shown as blank because a custom column was not selected to auto fill this field. When a field is auto-filled it is not editable by the user but will derive the values found in the user's record.

Field Name	Display?	Mandatory/ Required?	Custom /Reference	Auto-fill	EHRI
Section A: Trainee Information					
A. Agency Code: agency sub element and submitting office number	Yes/No	Yes/No	1129	Custom Column 1129 (ex. DJ##)	Yes
Applicant's Name					
First Five Letters of Last Name					
Social Security Number	Yes/No	Yes/No	Hidden Table	No	Yes
Date of Birth	Yes/No	Yes/No	Hidden Table	No	Yes
A4. Home Address				Summary Tab	
Street Address	Yes/No	Yes/No		Summary Tab	
City	Yes/No	Yes/No		Summary Tab	
State/Province	Yes/No	Yes/No		Summary Tab	
Postal Code	Yes/No	Yes/No		Summary Tab	
Country	Yes/No	Yes/No		Summary Tab	
Home Phone	Yes/No	Yes/No		Phone Numbers Tab (1st entry)	
A6. Position Level:	Yes/No	Yes/No			
A7. Organization Mailing Address				Org. address	
Org Name	Yes/No	Yes/No		Org. address	
Addr1	Yes/No	Yes/No		Org. address	

Field Name	Display?	Mandatory/ Required?	Custom /Reference	Auto-fill	EHRI
Addr2	Yes/No	Yes/No		Org. address	
City	Yes/No	Yes/No		Org. address	
State/Province	Yes/No	Yes/No		Org. address	
Postal Code	Yes/No	Yes/No		Org. address	
A8. Office Phone	Yes/No	Yes/No			
A9. Work Email Address	Yes/No	Yes/No			
A10. Position Title	Yes/No	Yes/No			
A11. Does applicant need special accommodation?	Yes/No	Yes/No			
A14. Pay Plan	Yes/No	Yes/No	CC #		
A15. Series	Yes/No	Yes/No	CC #		
A16. Grade	Yes/No	Yes/No	CC #		
A17. Step	Yes/No	Yes/No	CC #		
A12. Type of Appointment	Yes/No	Yes/No	CC #		
Education Level	Yes/No	Yes/No	CC #		
Section B: Training Course Data					
B1a. Name and Mailing Address of Training Vendor			Referenced		
Name	Yes/No	Yes/No	Referenced		
If Other, please specify:	Yes/No	Yes/No			
Street Address	Yes/No	Yes/No			
City	Yes/No	Yes/No			
State/Province	Yes/No	Yes/No			
Postal Code	Yes/No	Yes/No			
Country	Yes/No	Yes/No			
B1d. Vendor Telephone Number	Yes/No	Yes/No			
B1c. Vendor Email Address	Yes/No	Yes/No			
B1b. Location of Training Site	Yes/No	Yes/No			
If Same, mark box	Yes/No	Yes/No			
Street Address	Yes/No	Yes/No			
City	Yes/No	Yes/No			
State/Province	Yes/No	Yes/No			
Postal Code	Yes/No	Yes/No			
Country	Yes/No	Yes/No			
Course Title and Training Objective					
B2a. Course Title	**Yes (always)**	**Yes (always)**			Yes
Training Objective B18	Yes/No	Yes/No			
B2b. Course Number Code	Yes/No	Yes/No			
Training Period					
B3. Start	**Yes (always)**	**Yes (always)**			Yes
B4. Complete	**Yes (always)**	**Yes (always)**			Yes
Number of Course Hours					

Field Name	Display?	Mandatory/ Required?	Custom /Reference	Auto-fill	EHRI
B5. During Duty	Yes/No	Yes/No			Yes
B6. Non-Duty	Yes/No	Yes/No			Yes
Training Codes					
B7. Purpose	Yes/No	Yes/No	Referenced		Yes
B8. Type	Yes/No	**No**	None		Yes*
B9. Sub Type (in references this is Training Type)	Yes/No	Yes/No	Referenced		Yes
B10. Delivery Type	Yes/No	Yes/No	Referenced		Yes
B11. Designation Type	Yes/No	Yes/No	Referenced		Yes
B17. Training Source Type Code (B17)	Yes/No	Yes/No	Referenced		Yes
B12. Training Credit	Yes/No	Yes/No			Yes
B13. Credit Type	Yes/No	Yes/No			Yes
B14. Training Accreditation Indicator	Yes/No	Yes/No			Yes
B15. Continued Service Agreement Required Indicator	Yes/No	Yes/No			Yes
B16. Continued Service Agreement Required Expiration Date	Yes/No	Yes/No			
B19. Agency Use Only	Yes/No	Yes/No			
Section C: Costs and Billing Information					
C1. Direct Costs and appropriation Fund Charge					
a. Tuition - Amount	**Yes (always)**	**Yes (always)**			
a. Tuition – Appropriation Fund	Yes/No	Yes/No			
b. Books or Materials – Amount	**Yes (always)**	**Yes (always)**			Yes
b. Books of Materials – Appropriation	Yes/No	Yes/No			
C2. Indirect Costs and appropriation/fund Charges					
a. Travel – Amount	**Yes (always)**	**Yes (always)**			
a. Travel – Appropriation Fund	Yes/No	Yes/No			
b. Per Diem – Amount	**Yes (always)**	**Yes (always)**			Yes
b. Per Diem – Appropriation Fund	Yes/No	Yes/No			
C3. Total Training Non-Government Contribution Cost	Yes/No	Yes/No			
C4. Document/Purchase Order/Requisition No.	Yes/No	Yes/No			
C5. 8-Digit Station Symbol	Yes/No	Yes/No			
C6. Billing Instruction	Yes/No	Yes/No			
Verification					
V1. Course was Completed	**Yes (always)**	**Yes (always)**			

Field Name	Display?	Mandatory/ Required?	Custom /Reference	Auto-fill	EHRI
V2. Comments/Explanation	Yes/No	Yes/No			
V3. Actual Course Dates (Month/Day/Year)					
Commenced	Yes/No	Yes/No			
Complete	Yes/No	Yes/No			
V4. Actual Course Dates (Month/Day/Year)					
a. During Duty:					
b. Non Duty:					
V5. Academic Score	Yes/No	Yes/No			
V6. All Sessions were attended	Yes/No	Yes/No			
V7. All Sessions were attended Comments /Explanation	Yes/No	Yes/No			
*Cell B8, Type, is derived from the sub-type values when the SuccessFactors script runs the feed to OPM for ehri. Cells V4a and b are required values in the request form. Cells V8, V9, and V10 will display the values entered on the request form.					

System Admin>Configuration>Global Variables				
External Submission Default Process ID	Approval Process ID:			
External Verification Default Process ID	Approval Process ID:			
Enable External Submission User Message	Yes/No	Yes/No	This may be known as the Continuing Service Agreement. It will be turned on if required in the Global Variables. Get Message and place here.	Yes

The tables below contain a list for each of the SF-182 reference tables chosen by the <Client>:

References > Learning> Training Credit Type

Training Credit Type ID (30 char)	Training Credit Type Name (100 char)
01	Semester Hours
02	Quarter Hours
03	Continuing Education Unit
04	N/A

References > Learning > Training Purposes

Training Purpose ID (30 char)	Description (100 char)
01	Program/Mission Change
02	New Work Assignment
03	Improve Present Performance
04	Future Staffing Needs
05	Develop Unavailable Skills
06	Retention

References > Learning > Training Sources

Training Source ID (30 char)	Description (100 char)
01	Government Internal
02	Government External
03	Non-government
04	Government State/Local
05	Foreign Governments and Organizations

References > Learning > Training Types ***(this table is not created in the application but is in the backend and all values here will be derived from the table for Sub Type)***

Training Types ID (30 char)	Description (40 char)
01 - Training Program Area	Description: Functional or specialized training programs.
02 - Developmental Training Area	Description: Formal developmental/training programs.
03 – Basic Training Area	Description: Fundamental and/or required training programs.

References > Learning > Training Sub Types (This is Training Type under Reference menu)

Training Type Code	Training Type Sub-Code
01 - Training Program Area Description: Functional or specialized training programs.	01 – Legal Education or training in the concepts, principles, theories, or techniques of law.
	02 – Medical and Health Education or training in the concepts, principles, theories, or techniques of medicine.
	03 – Scientific Education or training in the concepts, principles, theories, or techniques of disciplines such as the physical, biological, natural, social sciences; education; economics; mathematics; or statistics.
	04 – Engineering and Architecture Education or training in the concepts, principles, theories, or techniques of disciplines such as architecture and engineering.
	05 - Human Resources Education or training in the concepts, principles, theories of such fields as public Administration; personnel; training; equal employment opportunity; human resources policy analysis; succession planning; performance management; classification; and staffing.
	06 - Budget/finance Business Administration Education or training in the concepts, principles, theories of business Administration, accounts payable and receivable; auditing and internal control; and cash management.
	07 – Planning and Analysis Education or training in the concepts, principles, theories of systems analysis; policy, program or management analysis; or planning, including strategic planning.
	08 – Information Technology Education and training in the concepts and application of data and the processing thereof; i.e., the automatic acquisition, storage, manipulation (including transformation), management, system analysis, movement, control, display, switching, interchange, transmission or reception of data, computer security and the development and use of the hardware, software, firmware, and procedures associated with this processing. This training type does not include any IT training on agency propriatory sytem.

Training Type Code	Training Type Sub-Code
	09 – Project Management Education and training in the concepts, principles, theories necessary to develop, modify, or enhance a product, service, or system which is constrained by the relationships among scope, resources, and time.
	10 – Acquisition Education or training in the concepts, principles, theories or techniques related to the 1102 occupation.
	11 – Logistic Specialty Training for professional skills of a specialized nature in the methods and techniques of such fields as supply, procurement, transportation, or air traffic control.
	12 – Security Training of a specialized nature in the methods and techniques of investigation, physical security, personal security, and police science.
	13 - Clerical (Non-supervisory clerical/Administrative) Training in skills such as office management, typing, shorthand, computer operating, letter writing, telephone techniques, or word processing.
	14 – Trade and Craft Training in the knowledge, skills, and abilities needed in such fields as electronic equipment installation, maintenance, or repair; tool and die making; welding, and carpentry.
	15 – Foreign Affairs Training for professional skills of a specialized nature in the methods and techniques of such fields as foreign languages, foreign culture, diplomacy, strategic studies.
	16 – Leadership/Manager/Communications Courses Training that address skill area such as Leadership/Management and Communication (i.e., written, oral and interpersonal) coursework.
02 - Developmental Training Area Description: Formal developmental/training programs.	20 - Presupervisory Program Development/training program for non-supervisors
	21 – Supervisory Program Development/training program which provides education or training in supervisory principles and techniques in such subjects as personnel policies and practices (including equal employment opportunity, merit promotion, and labor relations); human behavior and motivation, communication processes in supervision, work planning, scheduling, and review; and performance evaluation for first line supervisors.
	22 – Management Program Development/training program which provides mid-management level education or training in the concepts, principles, and theories of such subject matters as public policy formulation and implementation, management principles and practices, quantitative approaches to management, or management planning organizing and controlling. (Supervisors of supervisors; GS-14/15 supervisors; GS-14/15 direct reports to SES)
	23 – Leadership Development Program Formal developmental program that provide leadership training and development opportunities.
	24 – SES Candidate Development OPM-approved program to prepare potential SES members
	25 – Executive Development Continuing development for leaders above the GS-15 level
	26 – Mentoring Program Formal stand alone program with established goals, measured outcomes, access open to all who qualify, protégées and mentors paired to facilitate compatibility, training and support provided, company benefits directly.
	27 – Coaching Program Formal stand alone which provides ongoing partnership with an employee and coach that helps employee produce desired results in professional lives

Training Type Code	Training Type Sub-Code
03 – Basic Training Area Description: Fundamental and/or required training programs.	30 – Employee Orientation Training of a general nature to provide an understanding of the Organization and missions of the Federal Government, or the employing agency or activity, or a broad overview and understanding of matters of public policy.
	31 – Adult Basic Education Education or training to provide basic completeness in such subjects as remedial reading, grammar, arithmetic, lip reading or Braille.
	32 – Mandated Training Mandatory training for all employee Government wide. This includes training required by law and/or regulation; such as ethics, information system awareness, safety or health.
	33 – Work-life Training to promote worklife (e.g., health and wellness training, employee retirement/benefits training, etc).
	34 – Soft Skills Training involving development of employees' ability to relate to others (i.e., customer service, effective communication, dealing with difficult people, etc.).
	35 – Agency Specific Agency specific required training that is not addressed in Training Program Type 01 Appendix R. This training type does include IT training on agency proprietary system.

References > Learning > Training Vendors [please provide the values]

Training Vendor ID (30 char)	Description (40 char)

10) Commerce

Commerce is a set of features and tools in SuccessFactors that allows organizations to track the costs incurred during the development, delivery, and deployment of training in an organization, and to charge Users to attend training. Commerce is strictly a system that tracks transactions and credit/debit values; there is no exchange of money in SuccessFactors Learning.

10.1 Account Code

Account Codes are codes that will be assigned debits or credits for transactions in SuccessFactors Learning. Each transaction is called a Chargeback. When an Account Code receives a credit, it is referred to as a Profit Center. Account Codes may also be associated with multiple Profit Centers (other Account Codes which receive a distribution of profits). When the Account Code is debited, it is referred to as a Cost Center. If a chargeback method is used for Users to purchase training, they must have either a unique account code or may be authorized to use their Organization's account code. The chargeback methods may be one of the following for each item or scheduled offering:

- Authorized: user account code
- Specified: any valid account code
- None: displays price but no transaction in SuccessFactors
- Distribute charges: charges codes listed

Below is a list of sample account codes, along with discussion on the use of chargeback methods by <Customer Name>:

Commerce > Account Codes

Account Code ID (30 Char)	Profit Center	Description (100 Char)
MFG		*Manufacturing*

Notes

10.2 Cancellation Policies

A Cancellation Policy can be applied to items in the Master Inventory. You can create as many policies as you need, but only one policy can be applied to a single item. These policies contain a set of rules that dictate how Users should be charged (if at all) when they self-withdraw from a Scheduled Offering. Therefore, the Cancellation Policy is only active when there are Scheduled Offerings for an item. Below is a list of Cancellation Policies to be created by <Customer Name>:

References > Commerce > Cancellation Policies

Cancellation Policy ID (30 Char)	Description (100 Char)	Rules
7 Day	*7 Days Prior to Start*	*Delivery Offset Days = 7* *Charge 50%*

Notes

10.3 Cost Names

Cost Names represent additional costs associated with any Resource record, Items, Scheduled Offerings and Users. These 'custom costs' may be added to the cost calculation for the entity. For Resources, Items and Scheduled offerings, they may be factored into the delivery cost (E.g., Catering). For Users, the Cost Names are factored into the price of attending training (E.g., Lodging).

References > Commerce > Cost Names

Cost Name ID (30 Char)	**Description (40 Char)**	**Apply to**
Catering	*Catering and Food Services*	*Scheduled Offering*

Notes
Cost names may be needed for SF-182 (government clients only) to identify user travel costs

10.4 Currencies

If you conduct your business in a variety of geographic regions and regularly engage in transactions in those regions, multiple currencies will allow you alter your pricing for these regions. This includes the need to price and deliver training in any number of currencies that correspond to the various economies where they operate, and subsequently track the costs for this training in multiple currencies. This is more than just translating the price from one currency to another, but instead allows you to have separate pricing for different groups of users. Additionally, costs may be unique to the geographic region, so this also allows for separate costs for your resources.

Note: SuccessFactors comes with the currencies below. Administrators cannot add new currencies as they are part of product releases. The Global Default Currency is USD. This is modified in System Admin > Global Variables > General Settings and is accounted for in section 12.1.1 of this document.

References > Commerce > Currencies

- UAE Dirham (AED)
- Australian Dollar (AUD)
- Brazilian Real (BRL)
- Canadian Dollar (CAD)
- Swiss Franc (CHF)
- Yuan Renminbi (CNY)
- Euro (EUR)
- Pound Sterling (GBP)
- Yen (JPY)
- Won (KRW)
- Mexican Peso (MXN)
- Swedish Krona (SEK)
- Singapore Dollar (SGD)
- New Taiwan Dollar (TWD)
- US Dollar (USD)

Notes

10.5 Master Inventory

In the Master Inventory are references to all the items and their Scheduled Offerings, Curricula, and materials that have been created in SuccessFactors Learning. Catalogs are populated from the master inventory, and therefore there are references to published price. An item's Cancellation Policy is set here.

10.6 Order Status

Order Status is tracked in Order Management, and is the status associated with all transactions. They are assigned an Order Status Type (Submitted, Approved, Pending, Cancelled and Fulfilled). Order Status may be assigned as 'Default within Order Status Type' which means it is available for administrators when changing the status of a line item in Order Management.

References > Commerce > Order Status

Order Status ID (30 Char)	**Description (40 Char)**	**Order Status Type**	**Default within order status type**
Waiting	*Waiting on Approval Process*	*Pending*	*Y*

Notes

10.7 Pricing Rules

Pricing Rules are discounts that may be applied to Catalogs. Therefore if a User has access to a catalog with a discounted Pricing Rule applied, that percentage is deducted from the price of all items in the catalog. Below is a list of Pricing Rules to be created by <Customer Name>:

References > Commerce > Pricing Rules

Pricing Rule ID (30 Char)	**Description (100 Char)**	**Discount**
10_Percent	*10 Percent Discount*	*10%*

Notes

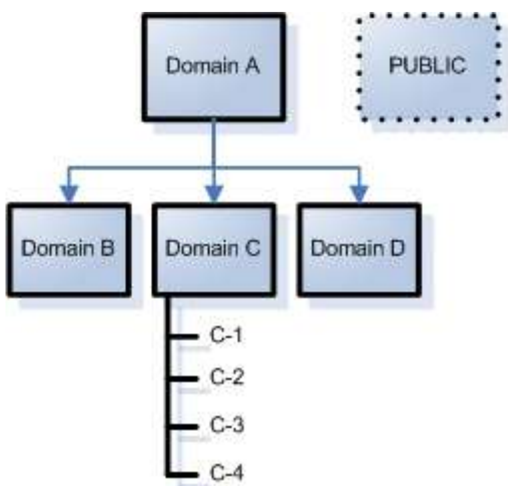
11) Security – Domains and Domain Restrictions

11.1 Domains

Most entities (Users, items, Curricula, etc) in SuccessFactors reside in a domain, which determines record ownership. Used in conjunction with Admin roles and domain restrictions, domains help control what records administrators may view, edit, copy etc. Domain structure should primarily be determined by the complexity, delegation and distribution of administrators. In environments controlled by a small team of Administrators, a complex domain structure may be unnecessary.

If Admin permissions are delegated regionally or by line of business for example, a more complex domain structure will allow for precise control of record ownership. Like directories on a network, administrators may have permissions to work with records in some but not others. The hierarchical nature of the domain tree(s) allows for easier distribution of Admin permissions from parent to child domains. The public domain is always present, and may be used by all administrators (if an Admin role specifies the 'add item' workflow, items may be added to the public domain). The public domain is best used as a 'share' in which administrators who cannot access mutual domains may place copies of records for other administrators to use.

Typical domain structures mirror the organization or regional structure. Depending upon the unique access requirements of groups of administrators, this model will vary widely. Best practice is to keep the domain structure small enough for ease of use yet large enough to accommodate the security needs of the organization. While it is important to put the proper domain structure(s) in place, domains may be added at any time.



Below is a list of domains <Customer Name> will create along with discussion of the security model of the <Customer Name> implementation:

System Admin > Security > Domains

Domain ID (30 Char)	Level	Parent Domain ID	Entity Types	Description (100 Char)
CORP	*1*		*ALL*	*Corporate*
HR	*2*	*CORP*	*ALL*	*Human Resources*

Notes

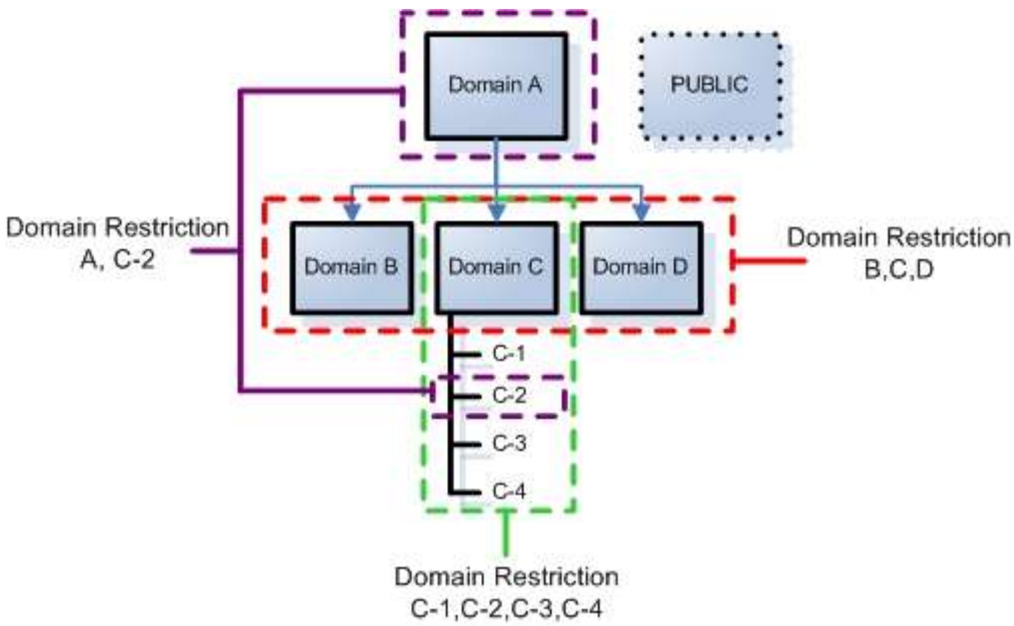
11.1.1 Domain Types

Domains by default may contain any entity type. Some security models incorporate domain type restrictions, allowing only entity types to be added to particular domains. With this approach, it is possible to create a specific domain structure for Users, learning entities, etc. As domains are defined in the following table, domains that are restricted by type are identified.

Notes

11.2 Domain Restrictions

Domain restrictions are records that determine in which domains administrators may perform workflows (add item, for example). If an Admin role workflow is unrestricted, any Admin with that role may perform the workflow to records in all domains. If restricted, the workflow may be performed only on records in domains included in the domain restriction. Domain restrictions may contain any combination of domains. In the graphic below, if administrator role workflows are restricted to Domain Restriction *B, C, and D* the administrator with that role can only perform those workflows in the B, C and D domains and the PUBLIC domain. There should be at least one domain restriction for every unique combination of domains in which a group of administrators must be able to perform workflows. This typically results in a domain restriction for every domain, every parent and child relationship and some 'mix and match' sets of domains.



Documented below are the Domain Restrictions <Customer Name> will create:

System Admin > Security > Domain Restrictions

Domain Restriction ID (30 Char)	Included Domain IDs	Include Sub-Domains	Description (100 Char)
A_C-2	*A, C-2*	*No*	*A and C-2 domains*

Notes

11.3 Role Management

11.3.1 Workflows

Admin roles consist of workflows – the combinations of functions (actions) and entities that grant system rights. There are over 800 possible workflows that could be assigned to an Admin role, many of which are individually available for domain restriction if required. Determining which workflows Admin roles should have is a challenging process and considerable time and resources should be invested in building and testing the Admin roles to perform the needed functions while keeping security and record access in place.

Admin Role

Function	Entity	Domain Restriction
Search	Item	A,C-2
View	User	
Add	Curriculum	B,C,D
Edit	Scheduled Offering	C-1,C-2,C-3,C-4
Delete	Catalog	

Each workflow may be restricted by domain, but only by one domain restriction record. This why domain restrictions contain more than one domain, and can contain any combination of domains. In the above example, Admin roles with the 'edit Scheduled Offering' workflow can edit offerings in the C-1, C-2, C-3 and C-4 domains (because those domains are referenced in that domain restriction record). The Admin role's 'view User' workflow is unrestricted. This Admin role may view all Users in the system.

11.3.2 Admin Roles

Admin roles consist of selected workflows with (or without) applied domain restrictions. Remember, domain restrictions are not applied to the Admin role – they are applied to each individual workflow within the role. Administrator roles are assigned to administrator accounts which in turn allow individual administrators access to SuccessFactors Learning. Admin accounts may have multiple Admin roles, as workflows do not interfere with each other. The Admin always has the combination of access provided by all assigned roles.

Listed below are the Admin Roles to be created by <Customer Name> along with notes from workshop discussions.

System Admin > Security > Role Management

Role ID (30 Char)	Description (100 Char)
INSTRUCTOR	*Administrator who trains of a group of users, accesses schedule offerings, generates reports and who has access to proctor codes.*
TRAINING ADMINISTRATOR	*Administrator who manages users, curricula, items, schedule offerings and resources.*
TRAINING COORDINATOR	*Administrator who manages the delivery aspects of training-scheduling, resources, registrations, etc.*
REPORT ONLY	*Administrator who has access to reports only.*
SYSTEM ADMINISTRATOR	*The default role with full access.*
VIEW AND SEARCH ONLY	*View and search access to the SuccessFactors LMS.*

Notes

11.3.3 User Roles

User Roles, like Admin Roles, are used to grant access in the SuccessFactors application. However, User Role workflows are primarily access to menus and Easy Links – not to records. There are no Domain Restrictions to apply. Typically, there is only one User Role (Default User) applied to all Users in an implementation. Sometimes there are needs recognized to grant different levels of menu access to different groups of Users. In which case, additional User Roles may be created and assigned automatically via Assignment Profiles to all the Users who match certain attributes. User Roles may also be assigned manually to individual Users.

Note: It is not necessary to create separate User Roles for Supervisors as they are subject to the User Role assigned to them and also the User Assumption Restriction Rules specified in the configuration xml file.

System Admin > Security > Role Management

Menu	Default User	Other User
Admin		
Admin Home (removed with 6.3.2)	*X*	
Career		
Access Competency Assessment History		
Access Career Planner [1]		
Access Competency Assessment Processes [3]		
Access Competency Assignments		
Access My Plan [1 or 2]		
Access Performance Reviews [2]		
Initiate Multi-Rater Assessments [3]		

Menu	Default User	Other User
Catalog		
Access Advanced Catalog Search	X	
Access Browse Catalog	X	
Access Calendar of Offerings	X	
Access Simple Catalog Search	X	
Learning		
Access Current Enrollment	X	
Access Qualification Status	X	
Access External Learning Requests [7]	X	
Access Learning Calendar	X	
Access Learning History	X	
Access Learning Plan	X	
Access SuccessFactors Offline Learning [8]	X	
Access Questionnaire Surveys	X	
Access Record Learning Events	X	
My Employees		
Cancel Subordinate Performance Review [2]	X	
Access My Plans [1 or 2]	X	
Access Employee Matrix	X	
Manage Alternate Supervisors	X	
Access Learning Plans	X	
Access Registrations	X	
Access Subordinate Competency Assessment Processes [3]	X	
Access Subordinate Deadline Dashboard	X	
Access Subordinate Goal Status Dashboard [1 or 2]	X	
Access Subordinate Performance Review Status Dashboard [2]		
Access Subordinate Performance Reviews [2]	X	
Access Subordinates	X	
Organization [4 or 5]		
Access Dashboard	X	
Access Initiatives [4]	X	
Access Succession Planner [5]	X	
Access Talent Pool	X	
Performance Management		
Access Advanced Career Planner [1]	X	
Access Development Planning [1]	X	
Access Goals Alignment [4]	X	
Access Performance Planning [2]	X	
View Review History [2]	X	
Access SuccessFactors Offline Multi Rater/360 [6]	X	
Personal		

Menu	Default User	Other User
Access Approvals	X	
Access Easy Link 1	X	
Access Easy Link 10	X	
Access Easy Link 2	X	
Access Easy Link 3	X	
Access Easy Link 4	X	
Access Easy Link 5	X	
Access Easy Link 6	X	
Access Easy Link 7	X	
Access Easy Link 8	X	
Access Easy Link 9	X	
Access Home	X	
Access Communities	X	
Access News	X	
Access Order Status	X	
Access Order Tickets	X	
Access Talent Gateway [9]	X	
Access Profile	X	
Access User Settings	X	
Access Shopping Cart	X	
Access Skills	X	
Reports		
Access Reports	X	

Note: License Dependencies (Selected workflows are not available without associated product licenses):
[1] Career and Development License Required
[2] Performance Goals and Appraisals License Required
[3] 360° Multi-Rater Assessments License Required
[4] Goal Alignment License Required
[5] Succession Planner License Required
[6] 360° Multi-Rater Assessments and SuccessFactors Offline Player Licenses Required
[7] External Learning Requests (SF_182)
[8] SuccessFactors Offline Player
[9] Talent Gateway

11.3.4 Delegate User Role

The delegate user role is assigned to a user who has been selected by a supervisor. The delegate will have most of the rights of the supervisor. The global setting for the delegate can be controlled from the User Proxy Role.

Menu	Delegate User
Career	
Access Competency Assessment History	x
Access Career Planner [1]	x
Access Competency Assessment Processes [3]	x

Menu	Delegate User
Access Competency Assignments	x
Access My Plan [1] or [2]	x
Access Performance Reviews [2]	x
Initiate Multi-Rater Assessments [3]	x
Catalog	
Access Advanced Catalog Search	x
Access Browse Catalog	x
Access Calendar of Offerings	x
Access Simple Catalog Search	x
Learning	
Access Current Enrollment	x
Access Qualification Status	x
Access External Learning Requests [7]	x
Access Learning Calendar	x
Access Learning History	x
Access Learning Plan	x
Access Questionnaire Surveys	x
Access Record Learning Events	x
My Employees	
Cancel Subordinate Performance Review [2]	x
Access My Plans [1 or 2]	x
Access Employee Matrix	x
Access Learning Plans	x
Access Registrations	x
Access Subordinate Competency Assessment Processes [3]	x
Access Subordinate Deadline Dashboard	x
Access Subordinate Goal Status Dashboard [1] or [2]	x
Access Subordinate Performance Review Status Dashboard [2]	x
Access Subordinate Performance Reviews ****	x
Access Subordinates [2]	x
Performance Management ****	x
Access Advanced Career Planner [1]	x
Access Development Planning [1]	x
Access Goals Alignment [4]	x
Access Performance Planning [2]	x
View Review History [2]	x
Personal	
Access Approvals	x
Access Easy Link 1	x
Access Easy Link 10	x
Access Easy Link 2	x
Access Easy Link 3	x
Access Easy Link 4	x
Access Easy Link 5	x
Access Easy Link 6	x
Access Easy Link 7	x
Access Easy Link 8	x
Access Easy Link 9	x
Access Home	x

Menu	Delegate User
Access Profile	x
Access User Settings	x
Access Skills	x
Reports	
Access Reports	x

12) System Configuration

12.1 Configuration - Global Variables

12.1.1 General Settings

System Admin > Configuration > Global Variables > General Settings

Setting	Details	Suggested Value	Selected Value
Currency	The Default Global Currency for the application. Administrators may choose currency preference for items, offerings and resources.	US Dollar is default value	
Percentage Symbol	All percentages are displayed with this symbol.	%	
Site Prefix	Used to prefix auto-generate ID's if applicable. If Auto-Generate ID's is enabled for a record type (System Admin > Application Admin), Site Prefix may be included when ID assigned.	None	
Admin User ID	Admin of record for LMS triggered processes including auto-filled registration of a User.	ADMIN,PLATEAU	
Introduction Panel ID	Default Admin Introduction (right-hand panel on Admin home page)	DEFAULT_ADMIN_INTRO	
Curriculum Basis Date	Curricula using items with Calendar based intervals default Basis Date (start date for calendar segmenting). Basis Date can be modified per Curriculum-Item.	1/1/2010	
Enable Substitutes	Allows SuccessFactors to record item completion for substitutes (if the relationships are created on the item records.	Yes	
Current revision completion removes previous Item revision assignment	If using item revisions, this setting prevents users from having old revisions on their Learning Plan after completing newer revisions.	Yes	
Enable software check for admins	Checks computer for correct software needed to run SuccessFactors Talent Management	Yes	
Enable software check for users	Checks computer for correct software needed to run SuccessFactors Talent Management	Yes	
Bypass second login after password	If checked, the system does not force the user to login a second time	Yes	

Setting	Details	Suggested Value	Selected Value
change:			
AICC Max-Normal	When you enter a value in the AICC Max-Normal box, the system places that value in the AICC Max-Normal box on the Online Settings tab when administrators create a new item record. This value represents the maximum number of content objects that the system can open simultaneously within that item.	99	
Enable Guide Me Mode	If checked, then the system places another **Enable Guide Me Mode** check box in each administrator's preferences. If you select the **Enable Guide Me Mode** check box for your preferences, then the system allows you to click **Use Guided Mode** when you click a *group* of quick links on your home page. Typically, the purpose of using the guided mode is to provide less experienced administrators with a guided process for completing routine, multi-step actions.	Yes	

Notes

12.1.2 Mail Settings

System Admin > Configuration > Global Variables > Mail Settings

Setting	Details	Suggested Value	Selected Value
Enable Email	Allows emails to be sent from SuccessFactors Learning.	No *Set to Yes when ready to use email notifications.	
SMTP Server:	Location of SMTP Server that sends SuccessFactors emails.	None (If Hosted: localhost)	
Enable SMTP Authentication	SMTP Server Authentication depends on server configuration.		
SMTP User ID:	If required for SMTP Authentication.		
SMTP User Password:	If required for SMTP Authentication.		
Admin Notification Email:	FROM address for emails sent from SuccessFactors to Administrators. Emails for locked Admin accounts and bounced emails are also sent TO this address.	Admin@<Customer Name>.com	
User Notification Email:	FROM address for emails sent from SuccessFactors to Users. Bounced emails are also sent TO this address.	Admin@<Customer Name>.com	
Email Frequency	How often emails in queue are sent to	5 (minutes)	

Setting	Details	Suggested Value	Selected Value
(minutes):	SMTP server.		
Enable vCalendar Attachments:	VCalendar attachments are associated with Scheduled Offering Registration emails to Users.	Yes	
Enable Email Archiving	If checked, then the system retains a copy of every notification message that it sends and enables the Purge Emails older than box.	No	
Send notification from	When administrators create and send ad hoc notifications, the system requires that those notifications contain a validly constructed email address that the notification should be sent from. If you select **Free-form** for **Send notification from**, then the system allows administrators to type a validly constructed email address. If you select **Admin**, then the system uses the email address for that administrator's record (System Admin>Application Admin>Admin Management>Summary tab). When you select **Admin,** administrators cannot change who the notification is sent from, which means that if the administrator does not have an email address, then that administrator cannot send an ad hoc notification. If you select **Select from list**, then you must provide a comma-delimited list of email addresses; the system adds the email address of the administrator who is attempting to send the notification to the top of this list automatically, and the administrator can select any one of those email addresses.	Free-form	

Notes

12.1.3 Electronic Signature Settings

Electronic signature settings provide another level of security in the form of a PIN when recording learning events. Once enabled all Users and administrators must enter a PIN at the next logon attempt.

The electronic signature feature for learning events supports the addition of multiple required electronic signature approvals. For the Learning Event approval process a second process can be initiated for additional approvals after the initial e-signature is signed. Additional approvers will be able to approve or deny a learning event from their approvals page, and “sign” the event with their electronic signatures.

For more information on approvals, see Approval Process settings.

Note: Disabling electronic signatures will automatically verify all unverified learning events.

System Admin > Configuration > Global Variables > Electronic Signature Settings

Electronic Signature Settings	
Enable electronic signatures:	Options: Y/N
Enable electronic signatures for external event:	Options: Y/N
External Event additional Approval Process ID: (approval process dropdown)	Default: Blank
Skip Additional Approval Process steps that do not have approvers:	Options: Y/N
Default Electronic Signature for new	
Default Electronic Signature for item: (Default setting for all new items)	Options: Y/N
Default Electronic Signature for completion status: (Default setting for all new statuses)	Options: Y/N
Completion Status additional Approval Process ID: (approval process dropdown)	Default: Blank
Default Electronic Signature for Curriculum:	Options: Y/N
Default Electronic Signature for Competency:	Options: Y/N
Default Electronic Signature for *Performance Review: (separately licensed)	Options: Y/N
Default Electronic Signature for *Assessment Process: (separately licensed)	Options: Y/N
Administrator Email:	Default: Blank
Enable PIN Expiration:	Options: Y/N
PIN Expires After (days):	Default: Blank
Count Between Repeated PIN: (cannot reset PIN to same as last x number of PINs)	Default: Blank
Minimum PIN Change Period (days): (must reset PIN with this range of days)	Default: Blank
Administrator Default Esig Meaning Code: (dropdown box)	Default: Blank
Users Default Esig Meaning Code: (dropdown box)	Default: Blank
Administrator Esig Message: (text box)	Default: Blank
Users Esig Message: (text box)	Default: Blank

Notes

12.1.4 Esig Meaning Code

A meaning code identifies the reason for entering the electronic signature: Adding, modifying or deleting a learning event are examples of the actions that may require e-signature entry by administrators and Users. Administrators may choose from the available list of meaning codes, while Users are forced to use the meaning code tied to the action they are performing (adding a learning event).

References > System Admin > ESig Meaning Code

Meaning Code ID (30 Char)	Admin/User	Description (40 Char)
RECORD	*Admin*	*Admin Recorded Learning Event*
MODIFY	*Admin*	*Admin Modified Learning Event*

12.1.5 Approval Process Settings

These are global settings that determine some behaviors associated with Approval Processes. An administrator can set up any number of approval processes with several steps of approval. Each step in the process can be assigned to a specific type of approver – employee, first level supervisor, second level supervisor, and the newly added Instructor role.

System Admin > Configuration > Global Variables > Approval Process Settings

Setting	Details	Selected Value
External Submission Default Process ID:	SF-182 only. Refer to separate EHRI configuration workbook.	N/A
External Verification Default Process ID:	SF-182 only. Refer to separate EHRI configuration workbook.	N/A
Enable External Submission User Message:	SF-182 only. Refer to separate EHRI configuration workbook.	N/A
External Submission User Message:	SF-182 only. Refer to separate EHRI configuration workbook.	N/A
Default Internal Approval Process ID:	Default approval process for all new items. Admin may change per item.	
Control Entity for Approval Role:	Determines if Users with Approval Roles may approve requests submitted by Users in specified Domains or Organizations. This is an important setting if using Approval Roles other than Supervisor Level I and II.	Options: Domain, Organization
Suppress final approval email notification for Registrations:	If 'N' Users receive two verifications – one for registration update, another for approval.	Options: Y/N
Suppress final rejection email notification for Registrations:	If 'N' Users receive two verifications – one for registration update, another for approval rejection.	Options: Y/N

Notes

12.1.6 Community Settings

Communities enable Users to consult with subject matter experts, form communities of practice, and participate in bulletin board-style discussion groups centered on training topics. Users can search threads for older discussions on a topic of interest in order to make use of institutional knowledge.

System Admin > Configuration > Global Variables > Community Settings

Community Settings	
Automatically create a community when an item is created:	Options: Y/N
Automatically create a community when a Schedule Offering is created:	Options: Y/N

Notes

12.1.7 Password Settings

System Admin > Configuration > Global Variables > Password Settings

Password Settings	
The following settings should be used if LDAP or SSO are in place as administrators and/or users should not be allowed to request or reset their passwords via SuccessFactors Learning.	
Allow user passwords to be changed	Options: Y/N
Allow users to request their ID and password:	Options: Y/N
Allow admin passwords to be changed	Options: Y/N
Allow admins to request their password	Options: Y/N
Note: Enabling both settings above for either Users and/or administrators results in the Security Question functionality becoming suppressed.	
The following settings apply to both admins and users for Native Authentication (non-LDAP/AD/SSO) only:	
Enable Password Aging:	Options: Y/N

Password Settings	
Password Expires After (days):	

Notes

12.1.8 Login Lockout Settings

These settings apply to both administrators and Users and are applicable only if SuccessFactors Native Authentication is in use (non-LDAP or SSO implementation). Users and administrators who lock their accounts due to unsuccessful login attempts must answer their security question and then receive a new encrypted password via email if they have an email address if the Login Lockout setting is enabled.

System Admin > Configuration > Global Variables > Login Lockout Settings

Login Lockout Settings	
Login Attempts:	*10*
Time Period for Login Attempts (hours):	*1*
Allow Admins and Users to Unlock Own Accounts:	*Options: Y/N*

Notes

12.1.9 Delegate Settings

Supervisor delegation allows supervisors (delegators) to entrust others with their responsibilities with the exception of the assessments and performance reviews of the delegator. A delegate is another user who is identified to perform the functions that the supervisor would normally perform.

If the administrator selects the Predefined Permissions check box, then supervisors can provide the predefined permissions to another user. If the administrator selects the Selected Permissions check box, then supervisor can select the workflows that he wants to grant to the user, allowing the supervisor to delegate specific tasks.

System Admin > Configuration > Global Variables > Delegate Settings

Login Lockout Settings	
Allow Supervisors to Delegate	
Predefined Permissions:	Options: Y/N
Selected Permissions:	Options: Y/N

Notes

12.2 (Basic) Configuration

12.2.1 Competency Assessment Settings

Theses global settings determine the factors that calculate into Users' Current Competency Rating (for assigned Competencies).

System Admin > Configuration > Competency Assessment

Setting	Details	Selected Value

Setting	Details	Selected Value
Competency Assessment Level Calculation:	Sets the required calculation variable for determining User's gap for assigned Competencies. For example, if set to 'Single Most Recent Assessment,' a User's Current Rating is based solely on the results of the last assessment – not an average of assessments over time.	Options: • Single Most Recent Assessment • Collection of recent Assessments in the last __Days • Collection of recent Assessments since __(date).
Assessments to Include:	Determines which of the 5 types of Competency Assessments factor into User's assigned Competency Current Rating.	Options: (select all that apply) • Assessment Process Results* • User Self (and Supervisor) Assessments • Admin Assessments • Item Completion • Performance Reviews (separately licensed)

*Assessment Process refers to 360° Multi-rater Assessments (separately licensed)

Notes

12.2.2 Content Players

The Content Player feature is used when the association between the player and the content object or exam is not automatic in the user's environment. The administrator can locate a player that will be accessible by all users attempting to launch the content for which the player is associated.
SuccessFactors compliant player refers to whether or not the selected player is able to read and interpret SuccessFactors Player command line parameters.
Prompt for bookmark usage prior to player execution will allow Talent Management to prompt the user to choose whether or not to resume an exam or content object at a specified bookmark. This feature works for SuccessFactors compliant players only.

System Admin > Configuration > Content Player

Content Player ID	Description	Executable Path	SuccessFactors compliant player	Prompt for bookmark usage prior to player execution
			Option Y/N	Option Y/N
			Option Y/N	Option Y/N

Notes

12.2.3 Easy Links

An Administrator can set up additional links that will display on the user interface called Easy Links. Navigate to System Admin>Configuration>Easy Links. These links point to URLs that you specify in the configuration screen shown below. The links open from the TMS window. The links will be listed for the users in the order they are listed in the configuration screen. The URL for these links must begin with http. The Label IDs are provided in the list but the label values must be edited under References>Geography>Labels.

Administrators can remove links from the application at any time by removing the URL from the Easy Links page. Some Easy Links can now to set to be hidden when viewing the end user form, as well as the supervisor links. The user can set some of the links to be hidden in a 'more' link. There is a configuration (wrench icon) on the links area that allows for this configuration. It is per user and also is across sessions. If the Admin adds a link, it is automatically displayed. The user must show at least one link.

System Admin > Configuration > Easy Links

ID	Label ID	URL Value	User Role
User Easy Link 1	data.menu.EasyLink1	http:\\companypolicies.com	DEFAULT
User Easy Link 2	data.menu.EasyLink2		
User Easy Link 3	data.menu.EasyLink3		
User Easy Link 4	data.menu.EasyLink4		
User Easy Link 5	data.menu.EasyLink5		
User Easy Link 6	data.menu.EasyLink6		
User Easy Link 7	data.menu.EasyLink7		
User Easy Link 8	data.menu.EasyLink8		
User Easy Link 9	data.menu.EasyLink9		
User Easy Link 10	data.menu.EasyLink10		

Notes

12.2.4 External Reports

The External Reports section contains links to external, HTTP accessible reporting tools. You can both configure and run the reports from this section.

Notes
Will the client use an external tool to generate reports from SuccessFactors Learning?

12.2.5 Quick Links Configuration

These settings control the groups or links you want to be shown on the Administration home page.

System Admin > Configuration > Quick Links Configuration

Quick Links Configuration		
Configure which groups or links to be shown on the Administration home page.		
Available	**Group Name**	**Selected**
AICC Import	Create Online Course	SCROM Import
Add Account Code	Create Online Course	Add Curriculum

Quick Links Configuration		
Configure which groups or links to be shown on the Administration home page.		
Available	**Group Name**	**Selected**
Add Administrator	Create Online Course	Users Needs Mgmt
Add Branding Style	Create Instructor-Led Course	Add Item
Add Class	Create Instructor-Led Course	Add Curriculum
Add Class Custom Column	Create Instructor-Led Course	Users Needs Mgmt
Add Community	Create Instructor-Led Course	Registration Assistant
Add Competency		Add User
Add Competency Profile		Add Item
Add Content Object		Add Catalog
Add Content Package		Add Scheduled Offering
Add Content Player		Add Assignment Profile
Add Curriculum		Record Learning - Multiple
Add Curriculum Custom Column		Users Needs Mgmt
Add Document		
Add Domain		
Add Domain Restriction		
Add Exam Custom Column		
Add Exam Object		
Add Group Instance		
Add Instructor		
Add Instructor Custom Column		
Add Item Custom Column		
Add Job Code		
Add Job Code Custom Column		
Add Objective		
Add Objective Custom Column		
Add Organization		
Add Organization Custom Column		
Add Organization Group		
Add Position		
Add Question		
Add Question Custom Column		
Add Questionnaire Surveys		
Add Region		
Add Requirement		
Add Role		
Add Scheduled Offering Custom Column		
Add Site		
Add Task		
Add User Custom Column		

Quick Links Configuration		
Configure which groups or links to be shown on the Administration home page.		
Available	**Group Name**	**Selected**
Attachments Utilization		
Cancel Scheduled Offering		
Catalog Price Change		
Chargeback Adjustment		
Close Scheduled Offering		
Competency Assessment Editor		
Competency Assessment Recorder		
Competency Gap Assistant		
Curriculum Scheduling		
Direct Link		
Import Data		
Label Import/Export		
Learning Event Editor		
Master Inventory Price Change		
Merge Users		
Printed Exam Template		
Purchasing Assistant		
Question Import/Export		
Record Learning – Financial		
Registration Assistant		
Required Dates Editor		
SCORM Import		
Scheduled Offering Notifications		
Send Notifications		
Supervisor Assistant		

12.2.6 Record Configuration

These settings control the layout of data when administrators view a record of the following types; Assignment Profile, Catalog, Curriculum, Item, Scheduled Offering, User.

System Admin > Configuration > Record Configuration

Assignment Profile

Assignment Profile Configuration – Basic Configuration		
Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	**Required Y/N**	**Display**
	N	Assignment Rules Summary
	N	Contact Email
	N	Created By

Assignment Profile Configuration – Basic Configuration		
Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	**Required Y/N**	**Display**
	N	Created For
	Y	Domain
	N	Notes
	N	Status

Assignment Profile Configuration - Record		
Select which fields you want on the basic record view. All other fields will still be accessible on the More section and in other areas of the application.		
Available	**Required Y/N**	**Display**
	N	Status
	Y	Domain
	N	Contact Email
	N	Created By
	N	Created For
	N	Notes

Assignment Profile Configuration – Related Info	
Select which sections you want displayed in the Associations area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**
	Catalogs
	Competency Profiles
	Curricula
	Plans
	Reviews
	Role

Assignment Profile Configuration - Related Info (more)	
Select which sections you want displayed in the Advanced area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**

Catalog

Catalog Configuration – Basic Configuration
Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.

Available	Required Y/N	Display
	N	Active
	N	Contact Email
	Y	Domain
	N	Pricing Rule

Catalog Configuration - Record		
Select which fields you want on the basic record view. All other fields will still be accessible on the More section and in other areas of the application.		
Available	**Required Y/N**	**Display**
	Y	Domain
	N	Contact Email
	N	Active
	N	Pricing Rule

Catalog Configuration – Related Info	
Select which sections you want displayed in the Associations area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**
	Items
	Curricula
	Assignment Profiles

Catalog Configuration - Related Info (more)	
Select which sections you want displayed in the Advanced area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**

Curriculum

Curriculum Configuration – Basic Configuration		
Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	**Required Y/N**	**Display**
Display in Catalog	N	Active
SKU	N	Creation Date
	N	Curriculum Type
	N	Custom Columns (list each one out if defined)
	N	Description
	Y	Domain

Curriculum Configuration – Basic Configuration		
Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	**Required Y/N**	**Display**
	N	Enable electronic signature
	N	Force Incomplete

Curriculum Configuration - Record		
Select which fields you want on the basic record view. All other fields will still be accessible on the More section and in other areas of the application.		
Available	**Required Y/N**	**Display**
Custom Columns (list each one out if defined)	N	Creation Date
Enable electronic signature	Y	Domain
	N	Curriculum Type
	N	Active
	N	Force Incomplete

Curriculum Configuration – Related Info	
Select which sections you want displayed in the Associations area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**
	Assignment Profiles
	Catalogs
	Contents
	Documents
	Job Codes

Curriculum Configuration - Related Info (more)	
Select which sections you want displayed in the Advanced area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**

Item

Item Configuration – Basic Configuration		
Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	**Required Y/N**	**Display**

Item Configuration – Basic Configuration		
Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	**Required Y/N**	**Display**
Approval Date	N	Active
Approved	N	Approval Process
Approved By	N	Approval Required
Audience	N	Assignment Type
Auto Fill Registration	N	CPE Hours
Catalog SKU	N	Classification
Comments	N	Contact Hours
Delivery Method	N	Contact's Email
Instructor Materials	N	Creation Date
Item Goals	N	Credit Hours
Lesson	N	Custom Columns (list each one out if defined)
Prep Time	N	Description
Rating	N	Do Auto Competency
Reviser	Y	Domain
Safety Related	N	Enable Orders
Shipping Required	N	Enable User Requests
Show in Catalog	N	Enable Users to Waitlist
User Materials	N	Enable electronic signature
User can access online content without being registered in offering	N	Initial Basis
	N	Initial Number
	N	Initial Period
	N	Length
	N	Max Registration
	N	Min Registration
	N	Registration Threshold Days
	N	Retraining Basis
	N	Retraining Number
	N	Retraining Period
	N	Self Registration
	N	Source
	N	Supervisors can record Learning Events for subordinates
	N	Users can record Learning Events for themselves

Item Configuration - Record

Select which fields you want on the basic record view. All other fields will still be accessible on the More section and in other areas of the application.		
Available	**Required Y/N**	**Display**
Active	N	Classification
CPE Hours	N	Enable Orders
Contact Hours	Y	Domain
Creation Date	N	Approval Process
Custom Columns (list each one out if defined)	N	Approval Required
Do Auto Competency	N	Assignment Type
Enable User Requests	N	Contact's Email
Enable Users to Waitlist	N	Credit Hours
Enable electronic signature		
Initial Basis		
Initial Number		
Initial Period		
Length		
Max Registration		
Min Registration		
Registration Threshold Days		
Retraining Basis		
Retraining Number		
Retraining Period		
Self Registration		
Source		
Supervisors can record Learning Events for subordinates		
User can record Learning Events for themselves		

Item Configuration – Related Info	
Select which sections you want displayed in the Associations area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**
	Segments
	Online Content
	Catalogs
	Competencies
	Curricula
	Prerequisites
	Subjects Areas
	Substitutes
	Scheduled Offerings

Item Configuration - Related Info (more)	
Select which sections you want displayed in the Advanced area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	Display
	Evaluations
	Instructors
	Notifications
	Objectives
	Requests
	Profit Centers
	Cost Calculation
	Documents
	Grading Options
	Materials
	Pricing
	Request Reasons
	Tasks

Scheduled Offering

Scheduled Offering Configuration – Basic Configuration		
Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	Required Y/N	Display
Auto Fill Registration	N	Active
Cancelled	N	Approval Process
Cancelled Date	N	Approval Required
Closed	N	Automatically record learning events after scheduled offering has completed
Closed Date	N	Custom Columns (list each one out if defined)
Comments	N	Contact
Fax	N	Description
Group Instance	Y	Domain
Phone	N	Email
	N	Email confirmation to the Contacts
	N	Email confirmation to the Instructor
	N	Email confirmation to the Supervisor
	N	Email confirmation to the User
	N	Enable Users to Waitlist
	N	End Date
	N	End Time
	N	Facility

Scheduled Offering Configuration – Basic Configuration		
Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	**Required Y/N**	**Display**
	N	For Credit Completion Status
	N	Instructor
	N	Item
	N	Location
	N	Maximum Registration
	N	Minimum Attendance Percentage for Credit
	N	Minimum Registration
	N	Non-Credit Completion Status
	N	Published Price
	N	Registration Cut-off Date
	N	Registration Cut-off Time
	N	Registration Cut-off Time Zone
	N	Registration Status
	N	Schedule Block ID
	N	Self Registration
	N	Start Date
	N	Start Time
	Y	Time Zone
	N	Use Time Zone of this Offering

Scheduled Offering Configuration - Record		
Select which fields you want on the basic record view. All other fields will still be accessible on the More section and in other areas of the application.		
Available	**Required Y/N**	**Display**

Scheduled Offering Configuration - Record		
Select which fields you want on the basic record view. All other fields will still be accessible on the More section and in other areas of the application.		
Available	**Required Y/N**	**Display**
Active	N	Item
Automatically record learning events after scheduled offering has completed	N	Scheduled Block ID
Custom Columns (list each one out if defined)	N	Approval Process
Contact	N	Approval Required
Email	Y	Domain
Email confirmation to the Contacts	N	End Date
Email confirmation to the Instructor	N	End Time
Email confirmation to the Supervisor	N	Facility
Email confirmation to the User	N	Instructor
Enable Users to Waitlist	N	Start Date
For Credit Completion Status	N	Start Time
Location	Y	Time Zone
Maximum Registration	N	Registration Status
Minimum Attendance Percentage for Credit		
Minimum Registration		
Non-Credit Completion Status		
Published Price		
Registration Cut-off Date		
Registration Cut-off Time		
Registration Cut-off Time Zone		
Self Registration		
Use Time Zone of this Offering		

Scheduled Offering Configuration – Related Info	
Select which sections you want displayed in the Associations area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**
	Registration
	Catalogs
	Segments

Scheduled Offering Configuration - Related Info (more)	
Select which sections you want displayed in the Advanced area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**

Scheduled Offering Configuration - Related Info (more) Select which sections you want displayed in the Advanced area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**
	Contacts
	Materials
	Notifications
	Cost Calculation
	Cost Summary
	Pricing
	Chargeback

User

User Basic Configuration - Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	**Required Y/N**	**Display**
Address	N	Active
City	N	Annualization Factor
Comments	N	Coach
Country	N	Custom Columns (list each one out if defined)
Gender	N	Compensation Manager
Locked	N	Current Salary
Postal Code	Y	Current Salary Currency
State/Province	Y	Domain
Terminated	N	Email Address
	N	Emp Status
	N	Emp Type
	Y	FTE Factor
	N	First Name
	N	Hired
	N	Job Code
	N	Job Family
	N	Job Grade
	N	Job Location
	N	Job Profession
	N	Job Title
	N	Last Name
	N	MI
	N	New Job Code
	N	New Password
	N	Organization

User Basic Configuration - Configure which fields are going to be used within the application in general. If a field is not needed, leave it in the Available area. All fields that you want as part of the application should be in the Display area.		
Available	**Required Y/N**	**Display**
	N	Picture
	N	Plateau Talent Gateway Access
	N	Position
	N	Primary Supervisor
	N	Prior Months of Service
	N	Prior Years of Service
	N	Region
	N	Rehire Date
	N	Related Admin
	N	Related Instructor
	N	Resume
	Y	Role
	N	Salary Range - Maximum
	N	Salary Range - Minimum
	N	Salary Range Currency
	N	Verify Password

User Record - Select which fields you want on the basic record view. All other fields will still be accessible on the More section and in other areas of the application.		
Available	**Required Y/N**	**Display**
Active	N	MI
Annualization Factor	N	First Name
Coach	N	Last Name
Custom Columns (list each one out if defined)	N	Picture
Compensation Manager	N	Job Code
Current Salary	N	Position
Current Salary Currency	N	Email Address
Emp Status	Y	Domain
Emp Type	N	Organization
FTE Factor	N	Primary Supervisor
Hired	N	Related Admin
Job Family	N	Plateau Talent Gateway Access
Job Grade		
Job Location		
Job Profession		
Job Title		
New Job Code		
New Password		

User Record - Select which fields you want on the basic record view. All other fields will still be accessible on the More section and in other areas of the application.		
Available	**Required Y/N**	**Display**
Prior Months of Service		
Region		
Rehire Date		
Related Instructor		
Resume		
Role		
Salary Range – Maximum		
Salary Range – Minimum		
Salary Range Currency		
Verify Password		

User Related Info - Select which sections you want displayed in the Associations area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**
	Learning Plan
	Learning History
	Curricula
	Competency Profiles
	Competencies
	Performance Review
	External Requests
	Assignment Profiles

User Related Info (more) - Select which sections you want displayed in the Advanced area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**
	Phone Numbers
	Registration
	Requests
	Online Status
	Assessments
	Commerce
	Account Code
	Catalog Preview
	Preferences
	Approval Role
	Approvals

User Related Info (more) - Select which sections you want displayed in the Advanced area. Any section not needed can be moved to the Available column and can be brought back later.	
Available	**Display**
	Organization Dashboard
	Organization Initiatives
	Succession Planning
	Alternate Job Codes
	Surveys
	Skills Inventory

12.2.7 Registration Settings

These settings control global Scheduled Offering behaviors. Registration statuses must be entered as Learning References before they may be referenced as a default status.

System Admin > Configuration > Registration Statuses

Setting	Details	Selected Value
Default Self-Registration Setting for New Items	Sets the Self Registration flag (Summary Tab) for new items by default.	Options: Y/N
Apply Registration Cut-off to Auto Fill Registration:	Disallows system auto-registration if Scheduled Offering cut-off date/time is in the past.	Options: Y/N
Supervisors can Override Item Prerequisites	Allows (or disallows) supervisors to register subordinates in scheduled offerings if users have not met prerequisites.	Options: Y/N
Supervisors can Override Maximum Capacity	Allows (or disallows) supervisors to register subordinates in scheduled offerings that have met capacity.	Options: Y/N
Confirmation Notification Defaults:	All Scheduled Offering notification settings default to these recipients. Admins may override these settings per offering.	Options: (select all that apply) • User • Instructor • Supervisor • Contacts • Organization (slot confirmation only)
Registration Statuses	Maps registration statuses (References> Learning) as the default Enrolled, Waitlisted, Cancelled and Pending Status. Only change if there are additional registration statuses that should replace default statuses.	Enrolled: *ENROLL* Waitlisted: *WAITLIST* Cancelled: *CANCELLED* Pending: *PENDING*

Notes

12.2.8 Talent Profile Configuration

One talent profile is configured to be used globally for all SuccessFactors Learning users. Users may update their own talent profile (editable sections) and some sections are populated with data from SuccessFactors Learning.

System Admin > Configuration > Talent Profile

General Settings for Sections and Expiration

Setting	Description	Chosen Value
Talent Profile Administrator Email	Allows users to submit an email to the admin if there are sections of the talent profile they cannot edit etc.	
Instructional Text	Provides page level instructions to users for editing/updating their talent profile. (accepts 1323 characters)	
Notify the User when the Talent Profile Expires	Email will be sent to user	Option: Y/N
Scheduled Expiration	Automatically expire the Talent Profile every	Option 1-12 (Months)
Start Date	Date field	3/24/2010
For : All Users For : Users in the selected organizations and their sub organizations	Automatically expire the Talent Profile option is for all users or selected users	Option: Y/N Option: Y/N
Add an Organization	If organization is selected, you can select one or more orgs.	

Layout for Talent Profile - Sections

Section	Displayed to Employee	Used	Editable
Contact Information		Y (Always)	Y
Employee Information		Y (Always)	Y
Contact Numbers			
Awards			
Communities			
Competencies			N (Never)
Curricula			N (Never)
Education			
External Work History			
Groups and Association			
Interests			
Internal Work History			N (Never)
Language Skills			
Learning History			N (Never)
Notes	N (Never)		
Other	N (Never)		
Skills			N (Never)
Preferences			

Section	Displayed to Employee	Used	Editable
Professional Licenses / Certifications			
Projects			
Security Clearance			

Layout for Talent Profile – Section Attributes

Display and Required columns indicate default settings. Always and Never mean default state cannot be changed.

Contact Information

Attribute	Display	Required
User First Name	Y (Always)	Y
User Middle Initial	Y (Always)	Y
User Last Name	Y (Always)	Y
Job Code	Y (Always)	Derived from user record
Organization Description	Y (Always)	Derived from user record
Job Location	Y (Always)	Derived from user record
User Picture	Y	N
Tags	Y	N
Email address	Y	Y
address-Street	Y	Y
address-City	Y	Y
address-State/Province	Y	Y
address-Postal Code	Y	Y
address-Country		N
Yahoo Messenger	Y	N
AIM Screename	Y	N
MSN Messenger	Y	N
Linkedin Public Profile	Y	N
Facebook Profile	Y	N
Personal Website	Y	N
Map for Address		

Contact Numbers

Attribute	Display	Required
Contact Description	Y (Always)	Y
Contact Number	Y (Always)	Y (Always)

Employee Information

Attribute	Display	Required
User ID	Y	Derived from user record
Gender	Y	Derived from user record
Date of Birth	Y	N

Attribute	Display	Required
Employee Type	Y	Derived from user record
Employee Status	Y	Derived from user record
Coach First Name	Y	N
Coach Middle Initial	Y	N
Coach Last Name	Y	N
Supervisor First Name	Y	Derived from user record
Supervisor Middle Initial	Y	Derived from user record
Supervisor Last Name	Y	Derived from user record
Hire Date	Y	Derived from user record
Length of Service	Y	Derived from user record
Number of Direct Reports	Y	Derived from user record
Resume Location	Y	N
Domain	Y	Derived from user record
Role	Y	Derived from user record
Summary Statement	Y	N

Awards

Attribute	Display	Required
Award Description	Y	Y
Date Awarded	Y	Y

Communities

Attribute	Display	Required
Community Type	Y	Derived from user record
Community Title	Y	Derived from user record
Role	Y	Derived from user record

Competencies

Attribute	Display	Required
Competency Description	Y	Derived from user record
Competency Rating	Y	Derived from user record

Curricula

Attribute	Display	Required
Curriculum Title	Y	Derived from user record
Curriculum Status	Y	Derived from user record

Education

Attribute	Display	Required
School Name	Y	Y
School address-City	Y	N
School address-State/Region	Y	N
School address-ZIP	Y	N

Attribute	Display	Required
School address-Country	Y	N
Degree Type Description	Y	Y
Year Graduated	Y	Y
Area of Study/Major	Y	N

External Work History

Attribute	Display	Required
Company Name	Y	Y
Job Title	Y	Y
City	Y	N
State	Y	N
ZIP Code	Y	N
From Date	Y	N
To Date	Y	N
Organization	Y	N
Description	Y	N

Groups and Association

Attribute	Display	Required
Group Type	Y	N
Group Name	Y	Y
Role	Y	N
Member Since	Y	Y
Member Until	Y	Y
Website	Y	N

Interests

Attribute	Display	Required
Interest Description	Y	Y
Interest Type	Y	Y

Internal Work History

Attribute	Display	Required
Job Title	Y	Derived from user record
Job Description	Y	Derived from user record
Job Location	Y	Derived from user record
Organization Description	Y	Derived from user record
From Date	Y	Derived from user record
To Date	Y	Derived from user record

Language Skills

Attribute	Display	Required
Language Description	Y	Y

Attribute	Display	Required
Proficiency in Reading	Y	Y
Proficiency in Writing	Y	Y
Proficiency in Speaking	Y	Y

Learning History

Attribute	Display	Required
Learning Item Title	Y	Derived from user record
Type	Y	Derived from user record
Completion Date	Y	Derived from user record
Status	Y	Derived from user record

Notes

Attribute	Display	Required
Notes	Y	N/A

Other

Attribute	Display	Required
Add User Custom Column Here	Y/N	Y/N

Preferences

Attribute	Display	Required
Willing to Travel	Y	N
Willing to Relocate	Y	N
Relocation Preferences	Y	N

Professional Licenses / Certifications

Attribute	Display	Required
License/Certification Name	Y	Y
ID	Y	N
Issuing Authority Country	Y	Y
Description	Y	N
Effective Date	Y	Y
Expiration Date	Y	N

Projects

Attribute	Display	Required
Project Name	Y	N
Project Description	Y	N
Position/Role	Y	N
Start Date	Y	N
End Date	Y	N

Security Clearance

Attribute	Display	Required
Security Clearance Type	Y	Y
ID	Y	N
Issuing Authority	Y	Y
Country	Y	Y
Description	Y	N
Valid From	Y	N
Expiration Date	Y	Y
First Issued	Y	N

Skills

Attribute	Display	Required
Skill Category Name	Y	Derived from user record
Skill Description for User	Y	Derived from user record
Experience Rating	Y	Derived from user record
Knowledge Rating	Y	Derived from user record
Frequency Rating	Y	Derived from user record
Importance Rating	Y	Derived from user record

Notes

12.2.9 User Password Settings

If using SuccessFactors Native Authentication (not LDAP or SSO) this is the default User password all Users must enter upon initial login. All Users must change this password to their own (compliant with password rules set in section 17.4.6).

System Admin > Configuration > User Passwords

User Password (1-40 Char)	Suggested Value	Selected Value
User Password	*STUDENT, P@ssw0rd*	

Notes

12.2.10 User Settings

These settings affect all SuccessFactors Users. Some are dependent upon menu level access determined by the User Role assigned to the User.

System Admin > Configuration > User Settings

User Settings

User Settings	
Prevent Users scheduling conflicts. (Users and Administrators may never double book a User in a Scheduled Offering) *Note: Users are ALWAYS prevented from scheduling conflicts when self-registering even if this setting is 'N.' Supervisors and administrators are unable to over-ride a schedule conflict when enrolling users if 'Y.'	Options: Y/N
Enable User to choose the Schedule Offering Time Zone display.	Options: Y/N
Default to User's Time Zone for display of Schedule Offerings.	Options: Y/N
Allow Users to change Regional Information.	Options: Y/N
Allow self-registration to proceed as long as the prerequisites will be completed prior to the scheduled start date.	Options: Y/N
Remove associated item from learning plan when Admin withdraws User(s) from Scheduled Offering(s).	Options: Y/N
Allow Users to assess Competencies of their own.	Options: Y/N
Allow users to initiate multi-rater assessment process for themselves	Options: Y/N
Allow Users to access online content without registration. (refers only to Blended Items)	Options: Y/N
Allow Users to change currency	Options: Y/N
Enable User Item Requests (Default Setting- may be overridden at Item level).	Options: Y/N

Notes

12.2.11 User Security Question Settings

If using SuccessFactors Native Authentication (no LDAP or SSO), all Users must enter a Security Question and answer at initial login. This is used for password retrieval purposes if the User forgets password.

System Admin > Configuration > User Settings

User Security Question Settings	
Security Answer Minimum Length	*6*

Notes

12.2.12 Users Learning Event Recording Defaults

These settings require additional User workflows in the User Role, granting access to the Record Learning page. At the Item record level, Administrators may choose enable or disable the ability for Users and/or supervisors to record learning events for that specific Item.

System Admin > Configuration > User Settings

User Learning Event Recording Defaults	
Users can record learning events for items:	Options: Y/N
Supervisors can record learning events for items:	Options: Y/N
Users can record learning events for external events:	Options: Y/N
Supervisors can record learning events for external events:	Options: Y/N

Notes

12.2.13 Learning Plan Notification Settings

These settings control the User Learning Plan notifications – whether Users/Supervisors should receive the notifications and if they may choose themselves.

Note: These notifications are triggered by the Learning Plan Notification APM (11.1.10) and include a rolled up list if applicable.

System Admin > Configuration > User Settings

Learning Plan Notification Settings	
Notify User when an Item is added to their Learning Plan:	Options: Y/N
Notify User when an Item is modified in their Learning Plan:	Options: Y/N
Notify User when an Item is removed from their Learning Plan:	Options: Y/N
Notify Supervisor when a User successfully completes an Item:	Options: Y/N
Notify Supervisor when a User unsuccessfully completes an Item:	Options: Y/N
Allow User to modify Learning Plan notification settings:	Options: Y/N

Notes

12.2.14 User Login/New Account Panels

User Login Panel displays the HTML below on the User side login screen (if using SuccessFactors Native Authentication or LDAP and no custom login screen). User New Account Panel displays the HTML below if the New User option is enabled (User Settings: Allow Users to create a new account at the SuccessFactors Learning login page.)

System Admin > Configuration > User Settings

User Login/New Account Panels	Display
User Login Panel:	* To login, enter your user ID and password in the space provided to the right. If you have forgotten your user ID or password, links below the login box will assist you in recovering your credentials. If you do not have an ID and would like to register, please click the "New User?" link below the login box. *
User New Account Panel:	

Notes

12.2.15 User-Created Account

Administrators can configure the fields that will be displayed on the new user screen. Administrators will be able to configure fields as mandatory, thus enabling customers to present important fields to users while hiding unnecessary or undesired fields of information.

System Admin > Configuration > User-Created Account

New User Settings	
Allow Users to create a new account at the SuccessFactors Learning login page.	Options: Y/N
Allow Users to choose an ID while creating a new account.	Options: Y/N
User-Created Account Introduction Message: *Please complete the "Create New Account" form and click Submit. After you create an account, you can view your To-Do List, add items to your cart, and check out.*	Default selected
User-Created Account Success Message: *Thank you for registering. Your user ID is now active in the system and your To-Do List will be updated within 24 hours based on any auto assignments your administrator has set up.*	Default selected

New User-Created Account Screen		
Field	**Display**	**Mandatory**
Contact Information		
User ID:	Yes	Yes
Password/Re Enter Password:	Yes	Yes
Security Q&A:	Yes	Yes
First Name:	Options: **Y**/N	Options: **Y**/N
Middle Initial:	Options: **Y**/N	Options: Y/N
Last Name:	Options: **Y**/N	Options: **Y**/N
Email Address:	Options: **Y**/N	Options: **Y**/N
Contact Address	Options: **Y**/N	Options: Y/N
Main Address:	Options: **Y**/N	Options: Y/N
City:	Options: **Y**/N	Options: Y/N
State / Province:	Options: **Y**/N	Options: Y/N

New User-Created Account Screen		
Field	**Display**	**Mandatory**
Postal Code:	Options: **Y**/N	Options: Y/N
Telephone Number:	Options: **Y**/N	Options: Y/N
Employee Information		
Job Location:	Options: Y/N	Options: Y/N
Commerce		
Billing Address:	Options: Y/N	Options: Y/N
Billing Phone Number:	Options: Y/N	Options: Y/N
Shipping Address:	Options: Y/N	Options: Y/N
Shipping Phone Number:	Options: Y/N	Options: Y/N
Preferences		
Locale:	Options: Y/N	Options: Y/N
Default Currency:	Options: Y/N	Options: Y/N
Default Time Zone:	Options: Y/N	Options: Y/N
Custom Columns (5 available)		
1.	Options: Y/N	Options: Y/N
2.	Options: Y/N	Options: Y/N
3.	Options: Y/N	Options: Y/N
4.	Options: Y/N	Options: Y/N
5.	Options: Y/N	Options: Y/N

Notes

12.3 Auto Generate IDs

These settings determine if ID's are automatically generated and assigned when certain types of entities are created by Administrators (or Users creating their own account).

System Admin > Application Admin > Auto Generated IDs

ID	Enable	ID Prefix	Site Prefix	Ordering
Item	Options: Y/N		Options: Y/N	Options: Site, ID ID, Site
Equipment	Options: Y/N		Options: Y/N	Options: Site, ID ID, Site
Instructor	Options: Y/N		Options: Y/N	Options: Site, ID ID, Site
User	Options: Y/N		Options: Y/N	Options: Site, ID ID, Site

Notes

12.4 Branding Styles

If more than one User interface branding style is necessary, SuccessFactors requires Branding Styles to reference additional style sheets. Branding Styles are associated with Domains and Organizations, as such that a User in a Domain that references a Branding Style will see that style applied upon login. Domains supersede Organization if a User resides in both a Domain and an Organization that reference alternate Branding Styles. Suborganizations and subdomains inherit the brand of their parent organization/domain.

System Admin > Application Admin > Branding Styles

Branding Style	File Location	User Introduction	Domains/Organizations
Customers	*/content/branding/customers*	*CUST_INTRO*	*Domain: CUSTOMERS*

Notes

12.5 Sites

Sites allow external Users access to SuccessFactors to view catalogs and create their own User account to access Items and/or Curricula. All Users created via this process have ‘external’ shopping account types, which requires them to use the shopping cart to self-assign Items. External Users never require approval if approval processes are associated with the Items and/or Scheduled Offerings. One benefit to using Sites is controlling the Domain and Organization of new User-created accounts. Users may also create their own accounts (if enabled) but the new accounts are created in the Public Domain unless Sites are used.

System Admin > Application Admin > Sites

Site	Description	Default Domain	Default Organization	Default Active Locale ID	Default Currency ID	Default Time Zone
EXT	*External Users*	*EXT*	*EXT*	*English*	*USD*	*America/New York*

Notes

12.6 User Introduction

The User Introduction represents the first screen that is displayed to the user when they access the User interface and is also referred to as the “News Page”. The Default User Introduction is often modified to configure the introduction page for all Users. If Branding Styles are in place, additional User Introductions may be created to further modify the content displayed to unique User populations. Note: If the DisplayNewsPageOnLogin element is set to “Never” in the LMS_ADMIN configuration, users will never see this page.   User Introductions support HTML and may reference content that is web accessible.

System Admin > Application Admin > User Introductions

User Introduction	Data
DEFAULT_LEARNER_INTRO	*div style="padding:10px 10px 0px"> How To Get The Most Out Of The SuccessFactors TMS <hr style="border: 1px solid #CCCCCC; height:2px"> <table border="0" cellspacing="0" cellpadding="0" style='border-collapse:collapse;width:100%'> <tr> <td colspan="4" height="10"> </td> </tr> <tr> <td style="width:10%; padding-top:10px; padding-bottom:10px;"> <img src="<ResourcePath/>/images/todo_list.png" border="0" alt="To-Do List"> </td> <td style="width:40%; padding-top: 10px; padding-left:10px;padding-right:15px;"> Work From Your To-Do List Your to-do items are conveniently listed in due date order, so that you can easily plan your work. </td> <td style="width:10%; padding-top:10px; padding-bottom:10px;"> <img src="<ResourcePath/>/images/status_pods.png" border="0" alt="Status Pods"> <td style="width:40%;padding-top: 10px;padding-left:5px;padding-right:10px;"> Stay On Target Review your Status Pods frequently. Click on any pod to drill into details. </td> ------------------------------truncated------------------------------*

Notes

12.7 Date/Time Format Patterns

References already exist for date and time format patterns but more may be added if necessary. The tables below contain all the existing patterns and is used to document need for additional patterns. Date/Time Format Patterns are associated also with Locales, so Administrators and Users may automatically have the patterns applied. Administrators may manually change their preferences for each pattern.

12.7.1 Date Patterns

Date Pattern ID	Example	Description
M/d/yyyy	*1/2/2008*	*System type date pattern*
MMM/d/yyyy	*JAN/2/2008*	*System type date pattern*
d/M/yyyy	*2/1/2008*	*System type date pattern*
d/MMM/yyyy	*2/JAN/2008*	*System type date pattern*
yyyy/M/d	*2008/1/2*	*System type date pattern*
yyyy/MMM/d	*2008/JAN/2*	*System type date pattern*

12.7.2 Time Patterns

Date Pattern ID	Example	Description
HH:mm:ss	*14:30:15*	*System type date pattern*
hh:mm:aaa	*02:30 PM*	*System type date pattern*
hh:mm:ss:aaa	*02:30:15 PM*	*System type date pattern*

12.7.3 Attachment Framework

The attachment framework is used within the application to attach external documents to Learning Events and Performance Reviews. The attachments utilization tool is used to gather attachment statistics. The statistics displayed are up to, but not including, the date you entered. If you click Purge, then the system removes all of the attachments from all associated records if the files that were attached before, but not including, the date you entered.

****Take caution with this feature because you cannot undo a purge.****

SuccessFactors recommends that attachments are carefully managed at the individual Learning Event and Performance Review. Some of the statistics displayed in the tool (for example, total attachment size allocated and maximum size allowed per attachment) come from a setting in the ATTACHMENT configuration xml file. The type of attachments allowed can be added or removed from the configuration xml file.

System Admin > Tools > Attachments Utilization

Notes

13) Tools

The Tools section allows System Administrators with the ability to manage certain aspects of the application on an “as needed” basis. The following sections do not require configuration decisions but decisions should be made as to when these processes will be run, if ever, by whom, and for what reason.

System Admin > Tools

13.1.1 Admin Passwords

The system administrator can click the button in this screen in order to force the expiration of all administrator passwords. Expiring all passwords requires all administrators to create a new password when they next log in. Administrators are asked to provide their old password for verification then create a new password. Passwords can also be managed from the Global Variables under Password Settings.

Notes

13.1.2 Attachments Utilization

Use the attachments utilization tool to gather more information to manage the attachments in the system. Click Show Statistics to view the attachment statistics up to, but not including, the date you entered or the date already displayed in the date field. Some of these statistics (for example, total attachment size allocated and maximum size allowed per attachment) come from a setting in the ATTACHMENT configuration ID (System Admin>Configuration>System Configuration).Click Purge to remove all of the attachments from the associated records if the files were attached before, but not including, the date you entered.

Note: If you plan to purge attachments, then we recommend that you check and double-check your dates because you cannot undo a purge.

Notes

13.1.3 Direct Links

The Direct Link wizard builds links to specific pages in SuccessFactors Learning. You can send the links to users so that they can access the pages by clicking the link. You can embed the links in any environment that accepts URL links. The use of direct links does not compromise security. Users will have access to only those sections of the application that their assigned workflow restrictions allow. Users are asked to provide login information if they are not already logged in.

Notes
An administrator can paste notification links into notification messages or paste the URL links into an e-mail message or Web page. Determine whether or not this functionality will be used for notifications. If URL will be pasted into a web page or an email, you may want to consider adding the html coding that will provide the user with a simply view, such as *Click Here to Access*.

13.1.4 Label Import/Export

You can use the Label Import/Export wizard in the following situations, for example:

- To export labels from a staging environment to import them into a production environment.
- To export labels that need to be edited, then import the changes back into the application.
- To import labels changed or added for new reports designed in SuccessFactors Report Designer.

Notes
There is a section later in this document that is used to capture label changes but it is recommended that you keep a copy of the original label file, should you need to resort to it at a later time. Determine when or if you will import the label file and where it will be stored for future reference. Determine who should be responsible for tracking label changes and who should be allowed to import and export. Keep in mind that an administrator can edit a label in the application without exporting the label file.

13.1.5 Learning Event Syncronization

Run the Learning Event Synchronization background job if you added learning events or learning plan records without using Talent Management (for example, if you ran a SQL statement against the database). It synchronizes the learning events with related records in the database.

Notes
Determine if there is a need at your organization for this tool to be run, by whom, and how often. It may be possible that you will not have a need for this tool.

13.1.6 Import Data

User data, learning events, and preferences that exist in another database can be imported into SuccessFactors Administration using this tool. Because each record type must include certain data and all data must be in a specific order, you must start the process by clicking the Download Template link, which allows you to save a copy of a correctly designed Excel workbook. . After you download the template and insert your data, you can import that data from the Excel workbook into SuccessFactors Administration.

Note: We recommend that you review the comments that are associated with every column header for each worksheet so that you know which data is required and in what format that data must be.

Notes
Will this tool be used? If so, how and who will import data? How will it get validated?

14) Automatic Process Settings

Automatic Process Modules (APMs) are scheduled jobs used to handle system email notifications, clean up processes, and update User assignments. Depending upon the SuccessFactors features being utilized, some APMs need not be scheduled. Listed below are APMs associated with SuccessFactors Learning. The email address identified in each of these processes is the recipient email for the log file that is generated each time the process runs.

APM Sequencing: There are no dependencies between Automatic Processes, so they may be sequenced to run according to need. However, it is wise to schedule the Assignment Profile Synchronization APM to run before any other APM to ensure training assignments are updated first. This is especially important if an HR connector is updating User records. E.g., HR Connector runs nightly at 1 am – Assignment Profile Synchronization should run nightly at 2 am to process all the new and modified User records and make appropriate training assignments / un-assignments before other APMs run.

System Admin > Automatic Processes

14.1.1 Assessment Notification

This APM is associated with the Multi-Rater Assessment module and need not be configured for SuccessFactors Learning customers. If there is a Performance implementation, refer to the Performance configuration workbook.

14.1.2 Assignment Profile Synchronization

This process reconciles changes in the attributes of Users and/or the Assignment Profiles with which they are associated. For example, if new Users are added to SuccessFactors via an HR interface, this process runs to assign or remove the Curricula, Role, and/or Catalog access assigned to any Assignment Profiles that the new records match or no longer match.

Assignment Profile Synchronization APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ## of Hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*Suggestion: American/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.3 Attachment Quota Watch Notification

This process sends a notification to an administrator when the system approaches a threshold limit which is a percentage of the maximum that is set in the ATTACHMENT configuration ID. The new notification template is called “ApmAttachmentQuotaWatch”.

Attachment Quota Watch Notification APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	(which Day)

Attachment Quota Watch Notification APM			
	☐	Weekly	Day:
	☐	Monthly	Date:
	12 - 5 AM Maintenance Timeslot (sequenced with other APMs)		
Time of Day:	*Suggestion: American/New York*		
Time Zone:	***EST***		
Utilization Threshold: (%)	***75***		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.4 Background Job Synchronization

This automatic process cycles through all scheduled reports, recurring report jobs, and automatic processes to ensure that they are all scheduled properly with the FLUX scheduling engine. If the system finds one that is not scheduled properly, then it reschedules it for the same date and time. The process also attempts to move customers from a file-based to a database-based reporting system. In doing so, the process uses the maxReportSize attribute of the <storage> element in the REPORT_SYSTEM configuration (System Admin>Configuration>System Configuration). When the process finds a report that is less than or equal to the value of the maxReportSize attribute, it imports the file to the database. If the file is too large, then the process does not import the file; however, it will check this report each time it executes until it successfully imports the file (or until the file is removed from disk by some other process, such as deleting it manually). An administrator could change the value of maxReportSize attribute between two executions of this process in order to allow the report to run.

Background Job Synchronization APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	
	☐	Daily	(which Day)
	☐	Weekly	Day:
	☐	Monthly	Date:
	12 - 5 AM Maintenance Timeslot (sequenced with other APMs)		
Time of Day:	*Suggestion: American/New York*		
Time Zone:			
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.5 Catalog Price Update

This automatic process monitors and periodically notifies the designated Administrator of catalog price changes according to the interval set. The APM is intended to aid in tracking catalog price changes.

Catalog Price Update APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.6 Clean-up Approval Processes

When business processes (Approval Processes) are withdrawn or cancelled the process remains on the User's record as an active business process. This APM will remove the withdrawn or cancelled processes.

Cleanup Approval Processes APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hours	Every # of Hours:
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.7 Clean-up Background Report Job

This process cycles through all of the background and recurring report jobs in the database. If any of the report jobs have been scheduled for longer than or equal to the number of days in the daysToExpire attribute of the <storage> element in the REPORT_SYSTEM configuration (System Admin>Configuration>System Configuration>), then the system retains the report job but removes the report from the database.

Cleanup Background Report Job APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every # of Hours:
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		

Cleanup Background Report Job APM	
Email address:	*ADMIN@<Customer Name>.com*

14.1.8 Curriculum Clean-Up

This process searches for two or more versions of an Item found in the same Curriculum. If two (or more) revisions of an Item are related to the same Curriculum, and both are "effective" (have an effective date before today's date), then the earlier Item(s) is removed from the Curriculum. Note: When and Item that is contained in Curricula is revised and the Curriculum update options are selected, both the old and new revisions of the Item reside in the Curriculum until this process runs. It is best practice for all Administrators to schedule the revision job to run overnight before this job to ensure Users never see duplicate Items on their Learning Plans or Curriculum Status pages.

Curriculum Cleanup APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		
Include Free-floating Item Assignments:	*Option: Y/N*		

Notes

14.1.9 Deny Expired Approval Processes

This process denies any pending registration or external learning type approval processes if the start date for the registration or external learning has passed. If this process is not scheduled, Users could potentially have approval processes pending for offerings that have already been delivered.

Deny Expired Approval Processes APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hours	Every # of Hours:
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.10 Evaluation Synchronization

The Evaluation Synchronization automatic process performs two tasks: it sends survey assignment notifications for both Item Evaluations and Follow-up Evaluations, and assigns Follow-up Evaluations to Users and their supervisors based on the assignment period configured for the Item. This automatic process uses the 'ItemEvaluationAssignmentNotification' template to send Item Evaluation email notifications to the affected users and uses the 'FollowupEvaluationAssignmentNotification' template to send email notification to Follow-up Evaluation participants.

Evaluation Synchronization APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ## of Hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		

Notes

14.1.11 External Verification Reminder

This APM is for SF-182 customers only. Add the APM if using SF-182.

14.1.12 Inventory Reorder

This automatic process searches for material type quantities on hand that are lower than the reorder value specified in the Materials tab of Facilities. For each quantity on hand that is equal to or lower than the reorder value, an email notification is sent to the facility contact person (listed on Contact tab of the Facilities record) reminding them of the need to reorder more materials. In addition, you can specify an additional email recipient in the Email address field and a comprehensive list of all materials that need to be reordered at any facility will be sent to that email address as well.

Inventory Reorder APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.13 Item Request Clean-up

Entries from the item request list will be removed automatically when one of the following events occurs;

1.) A User enrolls in the requested item or Admin enrolls the User into the requested item
2.) An Admin or User removes the request
3.) Learning event recorded that is a later completion date than the requested date

However, some item requests may still remain in the system. This Item Request Clean-up automatic process is intended to purge item requests identified by an Admin as no longer valid. It will purge all item requests that are older than the number of days listed in the **Threshold** box. For example, if “365” is listed in the **Threshold** box, then the system purges all requests that were made more than 365 days ago.

Item Request Clean-up APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	
	☐	Weekly	Day: Suggestion: Sunday
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Threshold:	*365*		

Notes

14.1.14 Item Scheduling Demand

When Users choose to ‘Request Schedule’ for an instructor led or blended Item on their Learning Plan or in a Catalog, the User is added to the queue of Item Requests. When the number of request matches the Minimum Registration on the Deliver Data tab of the Item, this process notifies the contact email specified on the Design Data tab of the Item. If Users are enrolled in a Scheduled Offering of the Item, they are removed from the request list. Triggers ApmComponentRequest Notification Template.

Item Scheduling Demand APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	
	☐	Weekly	Day: Suggestion: Sunday
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Reminder Period:	*15*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.15 Learning Expiration

This process sends e-mail notifications to Users and their Supervisors when assigned Items are approaching the Required By date. They will continue to receive the notifications according to the Reminder Period until the Item is complete or unassigned. Select the recipients for this email as user, supervisor or both. Triggers ApmTrainingExpiration Notification Template.

Note: The recipients set in this global APM can be set differently at the item level.

Learning Expiration APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	

Learning Expiration APM			
	☐	Weekly	Day:
	☐	Monthly	Date: Suggestion: 15th day
Time of Day:	12 - 5 AM Maintenance Timeslot (sequenced with other APMs)		
Notification Defaults			
Email Recipients:	User: *Yes/No*		Supervisor: *Yes/No*
Threshold:	*30 Days*		
Reminder Period (determines the interval, in days, between notification messages to Users regarding their need to complete expiring items. For example, if the value in **Threshold** is set to **30** and the **Reminder Period** is set to **7**, then a User will receive 4 email messages before the Item expires, and 1 per week after it expires.)	*15*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.16 Learning Plan Notification

This process notifies Users when Items are added to, removed from or modified on their Learning Plan since the last time the process ran. This process also notifies supervisors of learning events (for credit or not for credit) that have been recorded for Users since the last time the process ran. Note: User Learning Plan notification receipt is variable depending on settings configured in section 12.2.13. Triggers **ApmStudentLearningPlanNotification** and **ApmSupervisorLearningPlanNotification** Notification Templates.

Learning Plan Notification APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ## of Hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		

Notes

14.1.17 Power Search Synchronization

SuccessFactors created multiple tables so that localized data could be managed more efficiently. When you edit data for a record type that supports data localization, the system does not automatically synchronize the multiple database tables. Therefore, we recommend that you run the Power Search Synchronization automatic process to occur at least daily if not in minutes to synchronize the records in the database tables that support data localization. If you do not schedule this process, then your full-text search results will not return records that should be included for a search; thus, the results of a full-text search become increasingly unreliable over time.

Power Search Synchronization APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Minutely	Every # of Minutes:
	☐	Hours	Every # of Hours:
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes
Is this APM necessary for clients who have not localized?

14.1.18 Power Search Optimization

To make full text searching more efficient, SuccessFactors created full-text search indexes for many record types (for example, users, items, curricula, and so on). Each time you add a record or change part of a record (for example, the title of an item), the system updates the full-text search however, the system does not automatically update full-text search indexes. Therefore, we recommend that you schedule the Power Search Optimization automatic process. If you do not schedule this process, then full text searches will execute progressively slower over time.

Power Search Optimization APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hours	Every # of Hours:
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.19 Purge Expired Catalog Items

This process removes items from catalogs if the item catalog expiration is in the past. The APM also notifies the Item contact (Design Data tab) the Item is about to expire from Catalog(s) based upon the pre-expiration notification threshold. The contact email is notified according to the Pre-expiration Notification Threshold.

Purge Expired Catalog Items APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hours	Every # of Hours:

Purge Expired Catalog Items APM			
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Pre-expiration Notification Threshold:	*7*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.20 Refresh Org Dashboard Data

The organization dashboard uses temporarily saved data because some data is based on complex calculations that would take a long time to generate each time a User accesses the organization dashboard. The Refresh Org Dashboard Data automatic process is intended to set the periodicity for refreshing the saved data utilized by the organization dashboard in the User interface.

Refresh Org Dashboard Data APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	
	☐	Weekly	Day: Suggestion: Sunday
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*lmsadmin@plateau.com*		

Notes

14.1.21 Reset Online Item

This process finds all online items that were initially launched more than the number of days specified at the Item Online Settings tab level and resets Users online status, forcing them to re-launch and complete all content to complete the Item.

Reset Online Item APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.22 Scheduled Offering Delivery

This process sends e-mail "Registration Reminders" to Users (and their supervisors) who are enrolled in upcoming Scheduled Offerings. This is a one-time email reminder and is sent to all Users registered with an Enrolled status within the specified date threshold. Triggers **ApmInstanceDelivery** Notification Template.

Scheduled Offering Delivery APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Threshold (An offering is included in this process if its scheduled start date is within the number of calendar days you specify in the **Threshold** field)**:**	*15 days*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.23 VLS Attendance Processing

This automatic process records Item completion for Users who were enrolled in Scheduled Offerings delivered virtually if they met the required percentage of participation specified at the Offering level. Note: this auto-recording requires a VLS integration and does not apply to Scheduled Offerings delivered with an online collaboration tool that is not integrated with SuccessFactors Learning.

VLS Attendance Processing APM			
Schedule This Process:	Yes		
Schedule Frequency:	☐	Hours	Every # of Hours:
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Schedule End Date Threshold: When APM runs, processes the attendances for the VLS offerings which have ended. Select the offerings that are within 'X' days from the end date of the Scheduled Offering.	Options: 10/20/30		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

14.1.24 Waitlist to Request List

This process finds all Scheduled Offerings that have a start date/time in the past and adds any Users who remain registered with a Waitlist status to the Request List of the Item. Their registration status of Waitlist does not change for historical record keeping purposes.

Waitlist to Request List APM			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

15) Reports

There are over 90 SuccessFactors standard reports, depending upon licensed modules. Each report offers options for selecting, grouping and sorting your output in various ways. Output types include XML, CSV, HTML, and PDF formats – and some newer reports (built with SuccessFactors Report Designer) may be run in MS Excel. Reports may be run in a browser view mode or downloaded locally. Reports may also be scheduled to run on a recurring basis, and configured to send an email copy of the report to one recipient. Aside from these report configurations, standard reports cannot be configured to contain additional fields and data.

15.1.1 Reports Dashboard

Administrators use a searchable dashboard to locate, schedule, run and possibly import/export reports. The dashboard allows for filtering by Category, Publication Status (unpublished reports are accessible only to the Admin who imported the report), and Admin/User side reports (User reports can be imported/exported if created in SuccessFactors Report Designer but not run from the Admin side of SuccessFactors Learning). The search queries the report description field, making it easy to locate a report which contains certain types of data. Saved Reports and scheduled Report Jobs are also accessible to the admin via the dashboard.

15.1.2 SuccessFactors Report Designer

SuccessFactors allows you to create custom reports using SuccessFactors Report Designer (Powered by BIRT), which is a free application which is not built in to the SuccessFactors Administration interface. Administrators with the appropriate workflows may export reports to customize them in SuccessFactors Report Designer, and re-import them. Reports may also be built ‘from scratch’ using SuccessFactors Report Designer and imported into SuccessFactors Learning. Reports are all available in the Reports Dashboard depending upon the domain access (Standard and Custom reports are all located in the same searchable menu). When new reports are imported into SuccessFactors Learning, workflows for administrators are automatically created so access to that specific report can be completely controlled through Admin Roles.

Additional Notes:

Non-hosted customers: Report designers must have read access granted to the Staging database to use SuccessFactors Report Designer. It is highly recommended that unique accounts are created for each designer. Designers will not be restricted by domain (as administrators in the SuccessFactors application may be) and will have access to browse all database tables.

Hosted customers: SuccessFactors hosted customers do not have access to the Staging database and therefore a solution has been developed to allow hosted customers to utilize SuccessFactors Report Designer. This process involves adding an Admin Role to SuccessFactors which is used to grant access to the Staging database. Designers will not be restricted by domain (as administrators in the SuccessFactors application may be) and will have access to browse all database tables. The SuccessFactors Project Manager can provide details on this process and what steps the customer must take to grant access to designated report designers.

15.1.3 Report Domain

By default all SuccessFactors Reports are ‘in’ the PUBLIC domain – meaning any admin with the Search Reports workflow can see the report in the dashboard. They will need the associated ‘run’ workflow to run the report. This is an important consideration to make as the security of reports is taken into consideration. New reports designed for specific admin audiences could be completely hidden from other audiences based upon the report domain and Search Reports domain restrictions set at the admin role level.

15.1.4 Report Restriction Entities

Report details display the domain restriction entity which controls the data which appears on reports. E.g., a Class Roster report is restricted by the Scheduled Offering entity – therefore an admin with the Run Class Roster Report workflow can only include rosters based upon the domains included in the domain restriction applied to their workflow. This information is important in understanding what data is displayed to the admin when the report is run – and how it can be controlled.

15.2 User Management Reports

Reports > User Management Category

15.2.1 Account Data

The Account Data report displays a repository of User information.

- **Summary Version** includes only basic Human Resources-type information for the Users specified.
- **Detail Version** includes a comprehensive report of the Users' Curriculum status, current item needs and required dates, Competency profile assignments, assigned Competencies with required and assessed mastery levels, and the User's Learning History.

15.2.2 Certificate of Completion

Generates .pdf reports of Item completion for selected Users and Items. The Certificate is not configurable, but is often customized by SuccessFactors with watermarks, logos, etc. if custom report hours are available per SOW.

15.2.3 Certificate of Completion for Offerings

Generates .pdf reports of Scheduled Offering completion for selected offerings. The Certificate is not configurable, but is often customized by SuccessFactors with watermarks, logos, etc. if custom report hours are available per SOW.

15.2.4 Compensation Management Employee ID

The Compensation Management Employee ID report maps a user's ID in Talent Management to the matching employee ID in SuccessFactors Compensation.

15.2.5 Competency Assessment

The User Competency Assessment Report displays, for the Users and Competencies included in the report, the User's required mastery level, their assessed mastery level, and for each Competency, the date of the last assessment. Output may be grouped by either by User or by Competency. Grouping the report by User is a convenient way to view the Competency profile of each User included in the report.

15.2.6 Competency Assessment Comparison

The Competency Assessment Comparison Report to compares the competency ratings for a user with the organization average and the company average.

15.2.7 Competency Assessment Trend

The Competency Assessment Trend checks an employee's competency ratings for improvement over time.

15.2.8 Competency Profiles Status

The User Competency Profile Status Report displays, for the Users and Competency profiles included in the report, the date when the Competency profile was assigned to the User and whether or not the User has completed the requirements of the Competency profile. Output may be grouped either by User or by Competency profile, can show Competency detail.

15.2.9 Conflict

The User Conflict report shows the dates, times and schedule offerings conflict for the specified Users.

15.2.10 Cumulative Gap Analysis

The Cumulative Gap Analysis Report displays, for those Competencies and those Users selected, the average gap between the Users' current rating and the mastery level required in the User's Competency profile.

15.2.11 Curriculum Item Status

The User Curriculum Status Item Report displays, for the Users and Curricula included in the report, the Curriculum assigned to each User and their items. The completion date, completion status, and required date for each item are included.

15.2.12 Curriculum Status

The User Curriculum Status report displays the Curriculum status of the selected User(s) for the selected curricula. The report displays Curricula that are complete, incomplete or both, and the completion status of the Items within each Curriculum.

15.2.13 External Request Data

The External Request Data report returns all data related to an external request that a user has submitted. It returns the external request form that the user completed.

15.2.14 External Request Tuition

This report can be generated by By Fund, Group By Vendor, Group By Tuition, Group By User, Group By Title. The External Request Tuition report returns the list of external requests for tuition by user.

15.2.15 Item Status

The User Item Status report shows each User's completion status for the items they participated in during the date range specified. If no date range is specified, all records will be included. Substitute relationships and other completion statuses can also be displayed in this report. Note: Adding additional completion status as search selections for this report requires a custom report solution.

15.2.16 Job Code Detail

The Job Code Detail Report displays, for each Job Code included in the report output, the Curricula and/or Competency profiles associated with it.

15.2.17 Learning History

The User Learning History report shows all learning completions during the date range specified. The output is always grouped by item. Note: There is no filter for Items on this report. All recorded completions during the specified date range are displayed.

15.2.18 Learning Hours

The User Learning Hours report shows the total number of "hours" of a specified type that the User has completed. The report can show total hours by credit hours, CPE hours, contact hours or total hours.

15.2.19 Learning Needs

The User Learning Needs report shows the Users' outstanding training requirement(s) for the item or items specified. Required dates of training for each item are also included, where applicable.

15.2.20 Learning Plan

The User Learning Plan report shows the items that currently on Users' Learning Plans, required dates, and whether/when the User has completed the item if there is a retraining interval. The report is organized by User and can be sorted chronologically, by item or by Curriculum.

15.2.21 Multi-Rater Peer Vs User
The 360 Assessment Peer vs User Report compares the most recent 360 assessment competency ratings.

15.2.22 Online Item Status
The User Online Item Status report shows the User's current progress through online items. The report is organized by item. A User's progress through an online course is reported at the content module level of detail.

15.2.23 Organizational Assessment Data
This report lists information about organizations and their related Competencies.

15.2.24 Region Data
The Region Data report shows the facilities located within the region, and the instructors that have been assigned to the region.

15.2.25 Self-Registration/Withdrawal
The User Self-Registration/ Withdrawal report shows each User's ID, name, the Scheduled Offering ID, the related items, registration status, registration cut off date, tuition refund date, and registration date.

15.2.26 User Created Account
The User Created Account report shows all User self-created accounts including the User ID, name, date time the record was created, and the User's phone number.

15.2.27 User Costs
The User Costs report returns information about each selected User's cost for each item that they have completed. User Costs refers to Cost Names, which are additional costs incurred by the User.

15.3 Performance Reports

Reports > Performance Category

15.3.1 Assessment Process Results
The Assessment Process Results report describes the status of run-time assessment processes and the current results of the process (as added to the assessment by the users involved).

15.3.2 Assessment Survey Data
The Assessment Survey Data report describes information about the competencies assigned to an assessment survey and the assessment processes that use the survey.

15.3.3 Calculated/Supervisor Gap
You can use the Employee/Supervisor Ratings Gap report to see users whose self-rating was significantly different from their supervisor's rating. The gap can be positive or negative: the supervisor can have the higher or lower rating of the two. The report shows all gaps from the most recent performance review.

15.3.4 Competencies with Related Competency Profiles
The Competencies with Related Competency Profiles Report displays, for the Competencies included in the report, the Competency Profiles which contain them.

15.3.5 Competencies with Related Items

The Competencies with Related Items report displays the Competencies included in the report and the items related to the selected Competencies. The system groups the data in this report by Competency.

15.3.6 Competency Assessment Data

The Competency Assessment Data report, given competencies, returns the details of the competencies, including their associations to other objects like assessment processes and assessment surveys.

15.3.7 Competency Data

The Competency Data Report displays, for each Competency included in the report, the Competency type and domain, and its related subject areas and Competency profiles.

15.3.8 Competency Profile Data

The Competency Profile Data Report displays, for each Competency profile included on the report, the date the Competency Profile was created, the date last modified and User who last modified the Competency profile, and any related Competencies. By default, the output is grouped by Competency profile.

15.3.9 Competency Profile with Related Job Codes

The Competency Profiles with Related Job Codes Report displays, for the Competency profiles included on the report, the Job Codes aligned with the Competency profile. The report output is grouped by Competency profiles.

15.3.10 Employee Dropoff

The Employee Dropoff report returns users whose supervisor rating has fallen significantly from the previous review to the most recently published review.

15.3.11 Employee/Supervisor Gap

The Employee/Supervisor Gap report returns the users whose self rating was significantly different from their supervisor's rating.

15.3.12 Employees At Risk

The Employees at Risk report returns employees who are at risk to leave their Job Code, based on the last published performance review.

15.3.13 Employees Ready for Promotion

The Employees Ready for Promotion report returns employees who have been marked as ready for promotion (as of the most recent review) and their readiness rating, which is a value assigned to how or when the employee is ready to be promoted.

15.3.14 Performance Review Question Response

You can use the Performance Review Question Responses report to show the questions and responses on the most recent performance review. Responses include both numeric rating and comments of both the supervisor and employee.

15.3.15 Performance Review Score Summary

The Performance Review Score Summary report returns users' overall scores on their performance reviews.

15.3.16 Performance Review Status

The Performance Review Status report returns users' status (progress) in their performance reviews.

15.3.17 Talent Pools User Report Template

The Talent Pools User Report Template specifies the format for the Print User Report action available in Talent Pools. This report can include any data from the Talent Profile.

15.3.18 Targeted Job Summary

The Talent Pools User Report Template specifies the format for the Print User Report action available in Talent Pools. This report can include any data from the Talent Profile.

15.3.19 User Plan Status

You can use the Plan Status report to show the status of employee's plans. Employees and their supervisors create plans to set goals for the employee. The plans are in effect for a given plan period; a time during which employees work to meet goals. At the end of the plan period; plans expire.

15.4 Learning Reports

Reports > Learning Category

15.4.1 Class Data

The Class Data report displays all of the information about a class. This includes the basic information such as description, domain, and maximum capacity. It also includes the custom columns, the related Users, and the related Scheduled Offerings.

15.4.2 Class Location

The Class Location report displays, by class and by date, where a User in the class is supposed to be on a given date. The report shows the Users and the schedule offering segments on the axis of a matrix, and the location that the User was supposed to be for the segment

15.4.3 Class Progress

The Class Progress report displays, by class, the progress of all of the Users in a class. The report shows the Users and the schedule offerings of the class in a matrix format, with the completion status of each offering for each User inside the matrix.

15.4.4 Curricula with Related Job Codes

The Curriculum with Related Job Code report shows the Job Codes associated with the Curriculum. The report is always grouped by Curriculum.

15.4.5 Curriculum Data

The Curriculum Data report shows the Curriculum's domain, whether or not it is active, the date of creation, and details about any related items, Job Codes, and documents.

15.4.6 Custom Resource Data

The Custom Resource Data report shows any base or additional costs associated with the custom resource(s) selected.

15.4.7 Document Data

The Document Data report displays information for the selected documents, including the document type, source, location, revision and approval information. All linkages between a document, and tasks, Curricula, and items, are listed on the report.

15.4.8 Document Review Flag

The Document Review Flag report shows whether the relationship between the documents that are listed in the report and any tasks, Curricula, and items for the documents included in the report, should be reviewed because of an item revision.

15.4.9 Equipment Data

The Equipment Data Report displays a separate page of information for each individual piece of equipment of the equipment types that included in the report. The report shows for equipment record, the ID, Serial Number, Assigned Location, Status, Domain, and Hourly Cost of operation.

15.4.10 Equipment Status

The Equipment Status report displays with a separate line of information for each individual piece of equipment of the equipment types and statuses that included in the report (you must provide both criteria in order to run the report). The report includes each item's ID, assigned location, status, and domain.

15.4.11 Equipment Utilization

The Equipment Utilization Report displays, for the equipment types you select within a specified date range, the number of offerings for which each individual piece of equipment has been scheduled, and the total number of hours the equipment is scheduled to be in use.

15.4.12 Follow-Up Evaluation

This report shows the mean score (the average results of the rating scale questions) for each follow-up survey; survey page; and survey question.

15.4.13 Follow-Up Evaluation By Individual Response

This report shows the mean score (the average results of the rating scale questions) for each follow-up survey and survey page.

15.4.14 Instructor Data

The Instructor Data report shows the instructor's cost, shipping and email address, and items the instructor is authorized to teach.

15.4.15 Instructor Proctor Codes

The Instructor Proctor Codes report prints the proctor codes for the date range and instructors specified. The report can be sent to proctors for reference. Proctor codes unlock SuccessFactors Exams configured to use them.

15.4.16 Item Data

The Item Data report displays item data. If many items will be included in a detail report, the result can be quite lengthy.

15.4.17 Item Evaluation

The report shows the mean score (the average results of the rating scale questions) for each survey; survey page; and survey question and the percentage of users who selected each response.

15.4.18 Item Evaluation By Individual Response

This report shows each users responses to the survey questions.

15.4.19 Item Evaluation By Instructor

This report shows the mean score (the average results of the rating scale questions) for each survey and survey page; grouped according to the instructor.

15.4.20 Item List

The Item List report shows the item type and item ID, the revision date, and the title.

15.4.21 Item Object Details

The Item Object Details report contains details about the groups of Content Objects, the Content Objects themselves, and exams or surveys that are included in the online item.

15.4.22 Item Requests

The Item Requests report shows which Users have requested items but have not yet been enrolled or waitlisted in a schedule offering of the item.

15.4.23 Item Type List

The Item Type List Report displays, for the item(s) you have selected to include in the report, the item type and item ID, the revision date, and the title.

15.4.24 Items with Prerequisite Items

The Items with Prerequisite Items report lists those items that have been defined as prerequisites.

15.4.25 Items with Related Documents

The Items with Related Documents report shows the documents related to the item(s). The output is always grouped by item; you cannot change the default grouping.

15.4.26 Learning Calendar

The Learning Calendar report shows all the training events scheduled for the day. The report output is shown in a table, rather than in calendar format.

15.4.27 Learning Evaluation

This report shows the training effectiveness of items based on the average pre-test and post-test mean scores.

15.4.28 Material Data

The Material Data Report displays, for each material type included in the report, the facilities where inventories of the material type are traced, and the items to which the material record is associated. The facility data includes the current inventory level and the reorder point.

15.4.29 Registration Status

The Registration Status report shows a detailed list of registration information. When grouped by Scheduled Offering, it could serve as a class roster for an instructor. When grouped by User, it takes on the appearance of a class schedule for each individual User. Administrators may choose to include Users with specified registration statuses.

15.4.30 Resource Conflict

The Resource Conflict report shows existing scheduling conflicts involving locations, instructors, and equipment.

15.4.31 Schedule Offering Data

The Schedule Offering Data report shows detailed information about schedule offerings including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

15.4.32 Scheduled Offering Roster

The Scheduled Offering Roster report references Scheduled Offerings (NOT Classes). It shows the instructor and Users who have been scheduled. This useful report provides space for Users who are on the registration list to sign their names and date their signatures.

15.4.33 Slot Status

The Slot Status report shows the current status of any slots that have been purchased. Where User names have been identified to fill the slots, the User names are included on the report, along with the registration status and schedule information.

15.4.34 Substitute Relationship

The Substitute Relationship report shows those items for which a substitute relationship has been established, and what completion status goes on a User's record when he or she is given credit for completing an item via substitute.

15.5 Content Reports

Reports > Content Category

15.5.1 Exam Item Analysis

The Exam Item Analysis report returns the questions that were associated with an exam at run time. Exams can be randomized; their questions drawn from a pool. The report accounts for randomization and pools..

15.5.2 Exam Objects

The Exam Objects report returns metadata about exams, including its objectives and questions, scoring data, and analysis actions.

15.5.3 Score Summary Group By Organization

The Score Summary report summarizes how users scored on selected content objects during a specified time period. The report provides a final score that reflects the score of users' latest attempts to complete the corresponding content object; the time spent on each content object; the title of the selected content objects with the related items; and the number of attempts made by each user to complete the selected content objects. The content objects you select MUST be AICC or SCORM compliant.

15.5.4 User Exam Data

The User Exam Data Report returns (for all selected users, exams, and surveys) the details of users' performance on exams and surveys, including external exams. You can choose whether the report should include details of the users' performance with regard to individual questions, to the exam's associated objectives. You can also print each question on the report.

15.6 System Admin Reports

Reports > System Admin Category

15.6.1 Approval Process Data

The Approval Process Data report shows related approval process data such as; the Process ID, Process Name, Version, Domain ID, Owner Email, Process steps, etc. The report also shows the Items and Scheduled Offerings related to the Approval Process.

15.6.2 Approval Role Coverage

The Approval Role Coverage report shows the Users and the approval role assigned to approve their items and Scheduled Offerings.

15.6.3 Approval Role Data

The Approval Role Data report shows the approval processes assigned to each role, the Users that are tied to the process, as well as related approval data information such as; approval role ID and description.

15.6.4 Approvals Status

The Approvals Status report shows all information related to approvals. Information includes items and Scheduled Offerings submitted for approvals and their related status: (Approved, denied, etc.)

15.6.5 Facility Data

The Facility Data report shows the management and identifying information of each facility record included on the report. It then lists each facility's location, assigned equipment, and material types, quantity on-hand, and reorder level.

15.6.6 Holiday Profile

The Holiday Profile Report displays, for each holiday profile selected, the facilities to which it has been applied; and the names, dates, and database ID of each holiday that is included in each profile.

15.6.7 Licensing Audit

Run the User License Audit report annually and send the results via email or fax to SuccessFactors Systems, Ltd to ensure that you receive the maintenance support to which you are entitled.

15.6.8 Location Data

The Location Data report shows management data for each location included in the report; including location type, domain, capacity, operating cost rate, and any equipment that is assigned to the location.

15.6.9 Location Utilization

The Location Utilization report shows the number of schedule offerings in each location listed on the report and the total number of hours associated with those schedule offerings. The report is organized by location type.

16) Interface Modification

16.1 User Interface

<Customer Name> may request color changes for most of the User interface options. All colors must be provided in hexadecimal format (e.g., #000000) which can be filled out in the table at the end of this section. Some elements of the User interface are .jpg or .gif images which must be modified to match the branding scheme.

The following images detail the User interface sections which may be updated with new color values. Any additional User interface modifications require additional SuccessFactors resources on a time and materials basis.

Logo Requirements:

- Recommended size (width, height): see branding guide
- The logo must be a .gif file
- The logo should have a transparent background color or a background which matches the logo bar color.

Since version 6.1, SuccessFactors has introduced Flex technology that implements vector graphic images. This kind of technology replaces the use of cascading style sheet (css) files in some, but not all, parts of the application. A client would need to use a vector editing tool (like Flash or Illustrator) on the image files found in the assets folder. Eventually, all user screens will utilize the Flex technology.

PLEASE REFER TO THE BRANDING GUIDE FOR SPECIFIC INFORMATION ON INTERFACE CHANGES.

16.2 Label Changes

Label values may be modified throughout the User and Admin interfaces to accommodate necessary terminology changes. Labels may be identified and modified at **References> Geography > Labels**. Search for the label by its ‘Label Value’ or ‘Label ID’ and edit the values on the Locale tab of the label to make changes. The number of Locales is determined by licensed Language Packs. To do a larger find/replace of label values, it is possible to export labels as text from **System Admin > Tools > Label Import/Export**. Make the modifications in a text editor and re-import the labels.

Below are required label changes captured during the Learning Configuration Workshop:

Label ID	Locale	Locale Value	New Locale Value
data.menu.MyEmployees	*English*	*My Employees*	*My Team*
data.menu.EasyLink1	*English*	*User Easy Link 1*	*Company Policy*

Notes

17) Advanced System Configuration

17.1 Module Tab

The Module Tab Configuration file is a tool to configure the admin display of entity tabs and should be left to system Administrators to change. Changes to the module tabs are global and therefore affect all administrators with access to the entities modified. It is recommended that no changes be made to the Module Tab files in the application configuration phase, as it is difficult to identify what entity's tabs should be reordered and what tabs should be removed until administrators become more familiar with the interface. Changes may be made to these file at any time. It is also recommended to make a text file copy of the Module Tab files before editing.

Note: Starting with v6.4 the Record Configuration can also be used for specific entities (Assignment Profile, Catalog, Curriculum, Item, Scheduled Offering, User) to not display tabs which aren't used by the customer.

17.1.1 Module Tab Entities

Module Tab files are available for the entities listed below. Note: There are two files ("Simple" and "Advanced") associated with Items, Scheduled Offerings and Users. The simple file lists and orders the tabs shown to Admin in 'Simple View.' To add additional tabs to the simple view, copy and paste tab sections from the advanced file for the entity. The 'Advanced View' lists all the tabs displayed to administrators when the 'More Options' link is selected.

Module Tab Entities	
Item	Item Types
Scheduled Offering	Requirement
Curricula	User
Catalog	Assignment Profile
Custom Resource	Equipment
Facility	Instructor
Job Code	Location
Material	Organization
Task	Competency
Competency Profile	Competency Type
Competency Category	Competency Source
Cost Name	Region
Objective	Learning Event Editor
Questionnaire Survey	

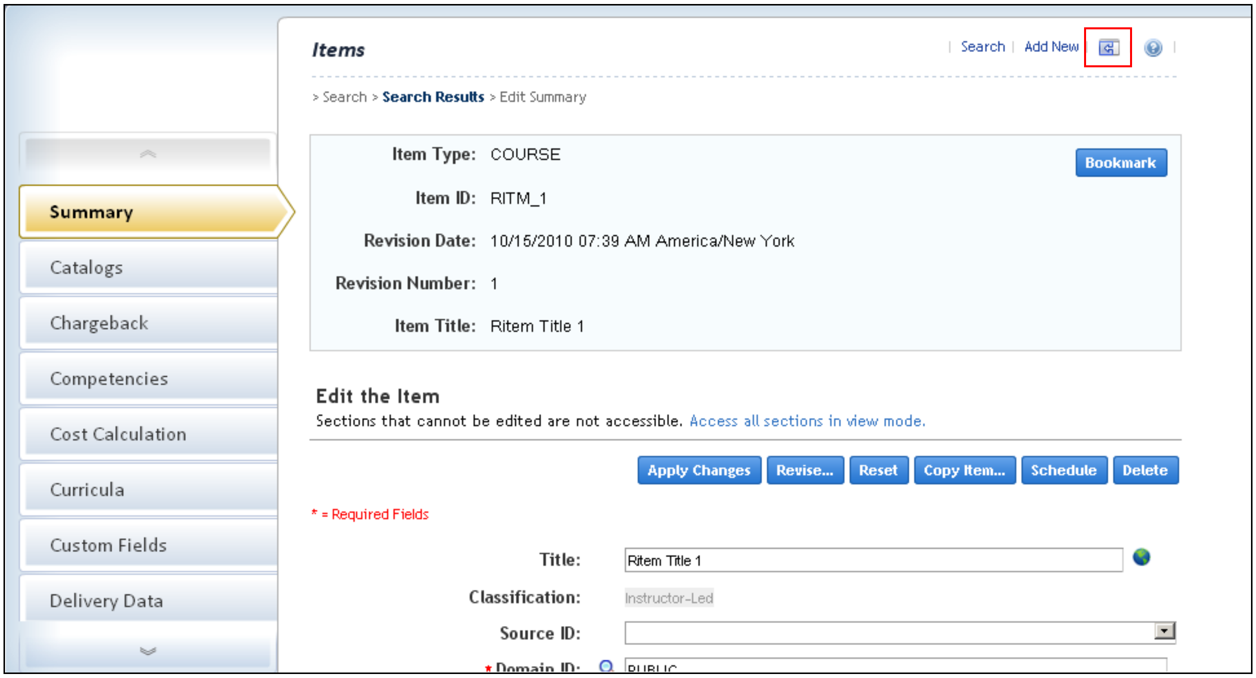
Note: There are references to legacy terms in the module tab IDs and syntax. A conversion table is provided below:

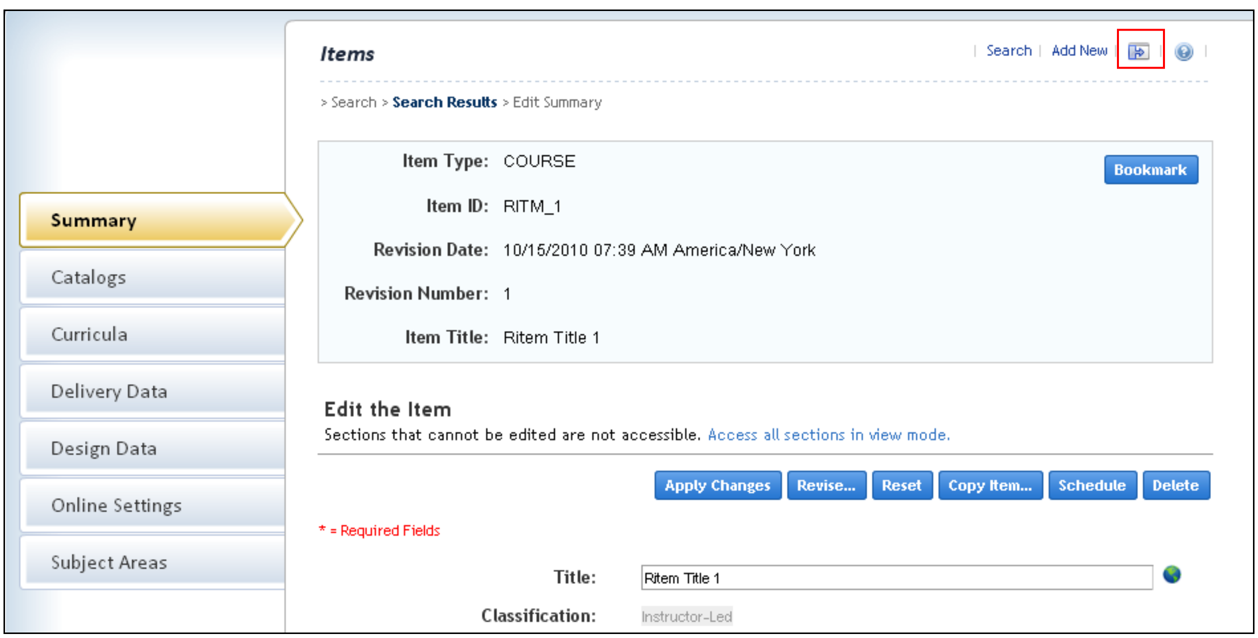
Legacy Term	Current Term
Student	User
Component	Item
Qualification	Curriculum
Schedule Instance	Scheduled Offering

17.1.2 Module Tab Edits

In the Module Tab properties files, tabs may be reordered or removed. Reordering tabs requires a change to the LMS_ADMIN file. It is recommended that removal of tab sections be accomplished by entering false (replace true) for the tab you want to remove. Any changes to these files should be documented by <Customer Name> in this configuration workbook. Add additional tables to this document to capture any changes to Module Tabs. The description of the module tab record should be added include the word “modified”.

The two figures below show the tabs on a Item record for a Learning Only license. The top figure shows the “Advanced View” (all the tabs) and the following figure shows the simple view, (“standard options.”) The option button used to change the view is shown below with a red box.





System Admin > Configuration > Module Tab

Advanced User (AdvanceStudent)

Tab	Remove (Y/N)	Order Number (bottom left to top right)
Summary	N	1
PhoneNumbers	N	2
CustomFields	N	3
LearningPlan	N	4
LearningHistory	N	5
Curricula	N	6
ProfProfiles (Competency Profiles)	N	7
Competencies	N	8
Enrollment	N	9
Requests	N	10
OnlineStatus	N	11
Assessments	N	12
Commerce	N	13
AccountCode	N	14
CatalogPreview	N	15
Preferences	N	16
JobRole (Approval Role)	N	17
Approvals	N	18
OrgDashboardOwnership	N	19
OrganizationInitiatives	N	20
SuccessionPlanning	N	21
AlternateJobPositions	N	22
PerformanceReview	N	23
ExternalRequests	N	24
Surveys	N	25
SkillsInventory	N	26

Simple User (SimpleStudent)

Tab	Remove (Y/N)	Order Number (bottom left to top right)
Summary	N	1
Learning Plan	N	2
Learning History	N	3
Competencies	N	4
Performance Review	N	5
Custom Fields	N	6
Curricula	N	7
ProfProfiles	N	8
Assessments	N	9

Notes

17.2 Notification Templates

Notification templates define emails delivered to Users, Instructors, Contacts, Supervisors and administrators for various triggers. For all system generated email notifications, there is a template which may be modified. Some notification templates are associated with APMs (Section 14). As part of a sound rollout strategy, each notification template that will be in use during the implementation should be reviewed and possibly edited. Users' first introduction to the SuccessFactors Talent Management System often is delivered in the form of an email notification.

The list below does not include the notifications sent out for performance modules (see the performance workbook). This section does not contain the actual syntax of the global notification templates. The SuccessFactors consultant may provide a Notifications document which may be used to reference the template syntax, or they may be accessed via SuccessFactors before modifications are made.

17.2.1 Template List

System Admin > Configuration > Notification Templates

Template ID	Description	Trigger	Recipient
ApmAttachmentQuotaWatch	Attachment Quota Watch Notification	When the combined size of the attachments in the system equals or exceeds the percentage in the Utilization Threshold box	APM email address
ApmCancelGeneratedScheduledOfferings	Scheduled Offerings that were marked will be cancelled.	Schedule Builder Process	Administrators
ApmComponentRequest	APM Item Request Notification Email Template	Item Scheduling Demand APM	Contact email at Item record level; APM email address
ApmInstanceDelivery	APM Offering Delivery Notification Email Template	Scheduled Offering Delivery APM	Users, Supervisors, APM email address
ApmInventoryReOrder	APM Inventory Re Order Notification Email Template	Inventory Reorder APM	Facility email, APM email address
ApmQualificationCleanup	APM Curriculum Clean Up Notification Email Template	Curriculum Cleanup APM	APM email address
ApmResetOnlineComponents	APM Reset Online Items Notification Email Template	Reset Online Item APM	APM email address
ApmStudentLearningPlanNotification	Notify Learner of Learning Plan changes	Learning Plan Notification APM	Users (Learning Plan Changes), APM email address
ApmSupervisorLearningPlanNotification	Notify Supervisor of Learning Plan changes	Learning Plan Notification APM	Supervisors (User Item Completion), APM email address
ApmSynchronizeStudentChangesAssignmentProfile	APM Assignment Profile Synchronization	Assignment Profile Synchronization APM	APM email address
ApmTrainingExpiration	APM Learning Expiration Notification Email Template	Learning Expiration APM	Users and supervisors, APM email address

Template ID	Description	Trigger	Recipient
ApmUpdateCatalogPrice	APM Update Catalog Price Email Template	Catalog Price Update APM	APM email address
ApmVlsAttendanceProcessing	APM VLS Attendance Processing Notification Email Template	VLS Attendance Processing APM	APM email address
ApmWaitlistRequest	APM Waitlist to Request List Notification Email Template	Waitlist to Request List APM	Users, APM email address
ApprovalProcessApprovalProgressed	Notify learner of progress in approval status	Approval Process new step reached	User
ApprovalProcessApprovalRequired	Notify approver of action required	Approval Process initiated	Requested approver
ApprovalProcessApprovalWithdrawn	Notify Learner of withdrawn request		
ApprovalProcessInitialRequest	Confirmation of Learner request submission	Approval process initiated	User
ApprovalProcessRequestApproved	Notify Learner of approved request	Approval granted	User
ApprovalProcessRequestDenied	Notify Learner of denied request	Approval denied	User
ApprovalProcessRequestExpired	Notify Learner of expired request	*	
BackgroundJobNotification	Email Notification Template for background jobs	Background Job Complete	Background Job email (Admin entered)
BackgroundReportJobNotification	Email Notification Template for Background Report Jobs	Background Report Job Complete	Background Report Job email (Admin entered)
CERTIFICATE_OF_COMPLETION	Email Notification for Sending Certificate of Completion	Learning Event Recorded – Admin email Certificate	User
DelegateeEmail	Delegatee Email Notification	A user has been selected by another user as a delegate	User
DelegationAssignment	Delegation Assignment Notification	Notification sent to user when supervisor selects user as a delegate	User
ESigPinExpiredNotification	Notification for Expired ESIG PIN	E-sig Expiration	User
ESigPinFailedNotification	Notification for ESIG PIN Failure	E-sig Verification Unsuccessful	E-sig Admin email (Sys Admin > Global Variables)
EnrollmentSlotCancellation	Registration Slot Cancellation Notification Email Template	Slots removed from Scheduled Offering	Organization email
EnrollmentSlotChangeConfirmation	Registration Slot Change Confirmation Notification Email Template	Slots changed on Scheduled Offering	Organization email
EnrollmentSlotConfirmation	Registration Slot Confirmation Notification Email Template	Slots created for Scheduled Offering	Organization email
ExpiredCatalogItemsNotification	Email Notification Template for Expiration of catalog items	Purge Expired Catalog Items APM	Item Contact email, APM email address

Template ID	Description	Trigger	Recipient
ExternalVerificationReminder	External Verification Reminder	Reminders for SF-182 forms that need verification	User
FollowupEvaluationAssignmentNotification	Questionnaire Survey Assignment Notification RollUp Email Template	Learning Event is recorded for an item with a Follow-up Evaluation and the Follow-up Evaluation APM runs.	User (if set at the item level), Supervisor (if set at the item level)
ItemEvaluationAssignmentNotification	Questionnaire Survey Assignment Notification Email Template	Learning Event is recorded for an item with an Item Evaluation associated.	User
PasswordNotification	Password Notification Email Template	User request Password	User
PreExpirationNotificationForCatalogItems	Email Notification Template for Pre Expiration of catalog items	Purge Expired Catalog Items APM	Item Contact email, APM email address
ReassignStudentComponentNotification	Reassign student component notification	User reassigned Item	User
RecurringReportJobNotification	Email Notification Template for Recurring Report Jobs	Admin creates recurring report Job	Recurring Report Job email address
SELF_REGISTRATION_ADMIN	Self Registration Admin Notification Template	User creates own User account	Admin Notification email (System Admin > Global Variables > Mail Settings)
SELF_REGISTRATION_STUDENT	Self Registration Learner Notification Template	User Creates own User account	User
SystemEnrollmentNotification	System Registration Notification	User self registers or Admin/Supervisor registers User in Scheduled Offering	User, Supervisor, Instructor, Contacts, *Admin/Supervisor may choose recipient groups. All are notified if User self registers.
SystemPendingEnrollmentNotification	System Pending Registration Notification	User self registers in Scheduled Offering with Approval Process	User, Supervisor, Instructor, Contacts
SystemScheduleCancellationNotification	System Scheduled Offering Cancellation Notification	Scheduled Offering cancellation	User, Supervisor, Instructor, Contacts, *Admin chooses recipient groups
SystemUnenrollmentNotification	System Unregistration Notification	User withdraws or Admin withdraws User from Scheduled Offering	User, Supervisor, Instructor, Contacts, *Admin chooses recipient groups, All are notified if User self-withdraws.

Template ID	Description	Trigger	Recipient
SystemWaitlistNotification	System Waitlist Notification	User registers or Admin registers User with Waitlist status	User, Supervisor, Instructor, Contacts, *Admin chooses recipient groups, All are notified if User self-registers
SystemWaitlistRemovalNotification	System Waitlist Removal Notification	Admin removes waitlisted user from scheduled offering registration list.	User, Supervisor, Instructor, Contacts, *Admin chooses recipient groups, All are notified if User automatically enrolled via auto-fill.
UserTalentProfileExpired	User Talent Profile Expiration Template	If 'Notify user when talent profile expires' is checked at System Admin > Configuration > Talent Profile > Expiration.	Users who belong to Organizations added to the Talent Profile Expiration list (scheduled or ad hoc).
VLE_ENROLLMENT	VLE Registration Notification Email Template	Users are enrolled in Scheduled Offering with VLS component.	Users
VLE_EVENT_CREATION	VLE Event Creation Notification Email Template	Scheduled offering segment has VLS server applied to it.	Instructor
VLE_EVENT_DELETION	VLE Event Deletion Notification Email Template	Scheduled offering segment has VLS server value removed..	Instructor
VLE_EVENT_UPDATE	VLE Event Update Notification Email Template	Scheduled offering segment has VLS time frames modified.	Instructor
VLE_EVENT_UPDATE_STUDENTS	VLE Event Update Learner Notification Email Template	Scheduled offering segment has VLS time frames modified.	User
VLE_UNENROLLMENT	VLE Unregistration Notification Email Template	Users are un-enrolled in Scheduled Offering with VLS component.	User

17.2.2 Editing Notification Templates

Notification templates consist of labels and syntax tags, and while they are not formatted with HTML out-of-box, administrators may use HTML to format system emails, add links, images and more. Labels may be easily modified if the goal is to change the wording of system emails. Considerations must be made when modifying labels with multiple language values (language packs), as the additional languages are not automatically updated and may require additional translation services (this is not a SuccessFactors service). Label changes also require application server reboot to propagate. Syntax tags call the SuccessFactors database for information, such as User names, item titles, scheduled offering segment information, etc. There is a limited set of syntax tags that may be included in notifications by group. Administrators may created new syntax tags in SuccessFactors Learning, BUT cannot add them to existing notification templates. This functionality exists to support customization of email templates.

Notes

17.3 Search Selectors

Search selector files handle the configuration of global search properties. When administrators search for entities, they may select from a list of available criteria (Add/Remove Criteria). When they view the results of a search, the Field Chooser allows them to choose which columns to display. Both of these settings are controlled per entity in search selector files. Making any configuration changes to the mandatory, default and optional criteria in the Add/Remove Criteria and Field Chooser is done from these files.

The search selector files control the global search interface, including which entity criteria require a sub-search to populate or a drop-down menu option.

The Search All Locales radio buttons are displayed on the administrator search pages where data has been localized. Data that has been localized refers to text that appears on the screen in the locale selected for the administrator. For example, the title of an item can be displayed in multiple languages, depending on the language packs installed. Not all searchable fields will have multiple language selections, but for those that do, the search will include all locales in the keyword search when enabled. When disabled, only the administrator's locale will be searched and no other languages will be displayed.

Search selectors are modified in xml and should only be edited by designated system Administrators with an understanding of xml syntax.

System Admin > Configuration > Search Selectors

Notes
Consideration of the use of searching for all locales; the default view of available criteria for search screens; the use of a drop-down box or the search icon (also known as "Picker" – shown as a magnifying glass); and the page that displays in a default search screen. For changes to the search defaults you can navigate to System Admin > Configuration > Search Selectors>*File to edit* and change these values: *properties.EntitySearchDefaultToResultPage=false* *properties.PickerSearchDefaultToResultPage=false* *dropDownEnabled=false* *dropDownId=null* *dropDownDisplay=null*

17.4 System Configuration Files

In 6.2.3, SuccessFactors switched from XML System Configuration files to .properties files. The following sections document the configuration of system properties files which control much of the global application settings. We recommend that you read the comments to understand how changing the file affects the system. To avoid accidental modification of any one of the files, we recommend that you create backup files for each one. Some changes to the configuration files require restarting the server.

System Admin > Configuration > System Configuration > FILE_NAME_TO_BE_EDITED

17.4.1 ADMIN QUICK LINKS

This configuration contains the default Quick Links and Groups that are provided with the system (System Admin>Configuration>Quick Links Configuration).

System Admin > Configuration > System Configuration > ADMIN QUICK LINKS

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
The link id is a combination of action type and menu_id. If any changes are made, enter those in the chosen value column. Be sure to edit the display order of all links if any are added or removed.			
	Not Displayed		links.AddAccountCode.id=AddAccountCode links.AddAccountCode.type=tab.Commerce links.AddAccountCode.descriptionKey=label.adminQuickLinks.description.AddAccountCode links.AddAccountCode.nameKey=data.workflow.AddAccountCode links.AddAccountCode.display.order=0.0 links.AddAccountCode.display.icon=commerce links.AddAccountCode.display.visible=false links.AddAccountCode.display.enabled=true links.AddAccountCode.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Not Displayed		links.AddAssessmentProcess.id=AddAssessmentProcess links.AddAssessmentProcess.type=data.menu.Performance links.AddAssessmentProcess.descriptionKey=label.adminQuickLinks.description.AddAssessmentProcess links.AddAssessmentProcess.nameKey=data.workflow.AddAssessmentProcess links.AddAssessmentProcess.display.order=0.0 links.AddAssessmentProcess.display.icon=performance links.AddAssessmentProcess.display.visible=false links.AddAssessmentProcess.display.enabled=true links.AddAssessmentProcess.display.isDefault=true links.AddAssessmentSurvey.id=AddAssessmentSurvey links.AddAssessmentSurvey.type=data.menu.Performance links.AddAssessmentSurvey.descriptionKey=label.adminQuickLinks.description.AddAssessmentSurvey links.AddAssessmentSurvey.nameKey=data.workflow.AddAssessmentSurvey links.AddAssessmentSurvey.display.order=0.0 links.AddAssessmentSurvey.display.icon=performance links.AddAssessmentSurvey.display.visible=false links.AddAssessmentSurvey.display.enabled=true links.AddAssessmentSurvey.display.isDefault=true
6	Displayed		links.AddAssignmentProfiles.id=AddAssignmentProfiles links.AddAssignmentProfiles.type=data.menu.Students links.AddAssignmentProfiles.descriptionKey=label.adminQuickLinks.description.AddAssignmentProfiles links.AddAssignmentProfiles.nameKey=data.workflow.AddAssignmentProfile links.AddAssignmentProfiles.display.order=6.0 links.AddAssignmentProfiles.display.icon=students links.AddAssignmentProfiles.display.visible=true links.AddAssignmentProfiles.display.enabled=true links.AddAssignmentProfiles.display.isDefault=true
	Not Displayed		links.AddBrandingStyle.id=AddBrandingStyle links.AddBrandingStyle.type=data.menu.SystemAdmin links.AddBrandingStyle.descriptionKey=label.adminQuickLinks.description.AddBrandingStyle links.AddBrandingStyle.nameKey=data.workflow.AddBrandingStyle links.AddBrandingStyle.display.order=0.0 links.AddBrandingStyle.display.icon=systemAdmin links.AddBrandingStyle.display.visible=false links.AddBrandingStyle.display.enabled=true links.AddBrandingStyle.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
4	Displayed		links.AddCatalog.id=AddCatalog links.AddCatalog.type=data.menu.Learning links.AddCatalog.descriptionKey=label.adminQuickLinks.description.AddCatalog links.AddCatalog.nameKey=data.workflow.AddCatalog links.AddCatalog.display.order=4.0 links.AddCatalog.display.icon=learning links.AddCatalog.display.visible=true links.AddCatalog.display.enabled=true links.AddCatalog.display.isDefault=true
	Not Displayed		links.AddClass.id=AddClass links.AddClass.type=data.menu.SystemAdmin links.AddClass.descriptionKey=label.adminQuickLinks.description.AddClass links.AddClass.nameKey=data.workflow.AddClassCustomColumn links.AddClass.display.order=0.0 links.AddClass.display.icon=systemAdmin links.AddClass.display.visible=false links.AddClass.display.enabled=true links.AddClass.display.isDefault=true
	Not Displayed		links.AddClasses.id=AddClasses links.AddClasses.type=data.menu.Learning links.AddClasses.descriptionKey=label.adminQuickLinks.description.AddClasses links.AddClasses.nameKey=data.workflow.AddClass links.AddClasses.display.order=0.0 links.AddClasses.display.icon=learning links.AddClasses.display.visible=false links.AddClasses.display.enabled=true links.AddClasses.display.isDefault=true
	Not Displayed		links.AddCompetencies.id=AddCompetencies links.AddCompetencies.type=data.menu.Performance links.AddCompetencies.descriptionKey=label.adminQuickLinks.description.AddCompetencies links.AddCompetencies.nameKey=data.workflow.AddCompetency links.AddCompetencies.display.order=0.0 links.AddCompetencies.display.icon=performance links.AddCompetencies.display.visible=false links.AddCompetencies.display.enabled=true links.AddCompetencies.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Not Displayed		links.AddComponent.id=AddComponent links.AddComponent.type=data.menu.SystemAdmin links.AddComponent.descriptionKey=label.adminQuickLinks.description.AddComponent links.AddComponent.nameKey=data.workflow.AddComponentCustomColumn links.AddComponent.display.order=0.0 links.AddComponent.display.icon=systemAdmin links.AddComponent.display.visible=false links.AddComponent.display.enabled=true links.AddComponent.display.isDefault=true
3	Displayed		links.AddComponents.id=AddComponents links.AddComponents.type=data.menu.Learning links.AddComponents.descriptionKey=label.adminQuickLinks.description.AddComponents links.AddComponents.nameKey=data.workflow.AddComponent links.AddComponents.display.order=3.0 links.AddComponents.display.icon=learning links.AddComponents.display.visible=true links.AddComponents.display.enabled=true links.AddComponents.display.isDefault=true
	Not Displayed		links.AddContentObjects.id=AddContentObjects links.AddContentObjects.type=label.Content links.AddContentObjects.descriptionKey=label.adminQuickLinks.description.AddContentObjects links.AddContentObjects.nameKey=data.workflow.AddContentObject links.AddContentObjects.display.order=0.0 links.AddContentObjects.display.icon=content links.AddContentObjects.display.visible=false links.AddContentObjects.display.enabled=true links.AddContentObjects.display.isDefault=true
	Not Displayed		links.AddContentPackages.id=AddContentPackages links.AddContentPackages.type=label.Content links.AddContentPackages.descriptionKey=label.adminQuickLinks.description.AddContentPackages links.AddContentPackages.nameKey=data.workflow.AddContentPackage links.AddContentPackages.display.order=0.0 links.AddContentPackages.display.icon=content links.AddContentPackages.display.visible=false links.AddContentPackages.display.enabled=true links.AddContentPackages.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.AddContentPackages.id=AddContentPackages links.AddContentPackages.type=label.Content links.AddContentPackages.descriptionKey=label.adminQuickLinks.description.AddContentPackages links.AddContentPackages.nameKey=data.workflow.AddContentPackage links.AddContentPackages.display.order=0.0 links.AddContentPackages.display.icon=content links.AddContentPackages.display.visible=false links.AddContentPackages.display.enabled=true links.AddContentPackages.display.isDefault=true
	Not Displayed		links.AddContentPlayers.id=AddContentPlayers links.AddContentPlayers.type=data.menu.SystemAdmin links.AddContentPlayers.descriptionKey=label.adminQuickLinks.description.AddContentPlayers links.AddContentPlayers.nameKey=data.workflow.AddContentPlayer links.AddContentPlayers.display.order=0.0 links.AddContentPlayers.display.icon=systemAdmin links.AddContentPlayers.display.visible=false links.AddContentPlayers.display.enabled=true links.AddContentPlayers.display.isDefault=true
	Not Displayed		links.AddCustomReports.id=AddCustomReports links.AddCustomReports.type=label.Report links.AddCustomReports.descriptionKey=label.adminQuickLinks.description.AddCustomReports links.AddCustomReports.nameKey=data.workflow.AddCustomReport links.AddCustomReports.display.order=1.0 links.AddCustomReports.display.icon=report links.AddCustomReports.display.visible=false links.AddCustomReports.display.enabled=false links.AddCustomReports.display.isDefault=true
	Not Displayed		links.AddDocuments.id=AddDocuments links.AddDocuments.type=label.Content links.AddDocuments.descriptionKey=label.adminQuickLinks.description.AddDocuments links.AddDocuments.nameKey=data.workflow.AddDocument links.AddDocuments.display.order=0.0 links.AddDocuments.display.icon=content links.AddDocuments.display.visible=false links.AddDocuments.display.enabled=true links.AddDocuments.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Not Displayed		links.AddDomainRestriction.id=AddDomainRestriction links.AddDomainRestriction.type=data.menu.SystemAdmin links.AddDomainRestriction.descriptionKey=label.adminQuickLinks.description.AddDomainRestriction links.AddDomainRestriction.nameKey=data.workflow.AddDomainRestriction links.AddDomainRestriction.display.order=0.0 links.AddDomainRestriction.display.icon=systemAdmin links.AddDomainRestriction.display.visible=false links.AddDomainRestriction.display.enabled=true links.AddDomainRestriction.display.isDefault=true
	Not Displayed		links.AddDomains.id=AddDomains links.AddDomains.type=data.menu.SystemAdmin links.AddDomains.descriptionKey=label.adminQuickLinks.description.AddDomains links.AddDomains.nameKey=data.workflow.AddDomain links.AddDomains.display.order=0.0 links.AddDomains.display.icon=systemAdmin links.AddDomains.display.visible=false links.AddDomains.display.enabled=true links.AddDomains.display.isDefault=true
	Not Displayed		links.AddExamandSurveyObjects.id=AddExamandSurveyObjects links.AddExamandSurveyObjects.type=label.Content links.AddExamandSurveyObjects.descriptionKey=label.adminQuickLinks.description.AddExamandSurveyObjects links.AddExamandSurveyObjects.nameKey=data.workflow.AddExamObject links.AddExamandSurveyObjects.display.order=0.0 links.AddExamandSurveyObjects.display.icon=content links.AddExamandSurveyObjects.display.visible=false links.AddExamandSurveyObjects.display.enabled=true links.AddExamandSurveyObjects.display.isDefault=true
	Not Displayed		links.AddExam.id=AddExam links.AddExam.type=data.menu.SystemAdmin links.AddExam.descriptionKey=label.adminQuickLinks.description.AddExam links.AddExam.nameKey=data.workflow.AddExamCustomColumn links.AddExam.display.order=0.0 links.AddExam.display.icon=systemAdmin links.AddExam.display.visible=false links.AddExam.display.enabled=true links.AddExam.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.AddForum.id=AddForum links.AddForum.type=data.menu.Learning links.AddForum.descriptionKey=label.adminQuickLinks.description.AddForum links.AddForum.nameKey=data.workflow.AddForum links.AddForum.display.order=0.0 links.AddForum.display.icon=learning links.AddForum.display.visible=false links.AddForum.display.enabled=true links.AddForum.display.isDefault=true
	Not Displayed		links.AddGroupInstances.id=AddGroupInstances links.AddGroupInstances.type=data.menu.Learning links.AddGroupInstances.descriptionKey=label.adminQuickLinks.description.AddGroupInstances links.AddGroupInstances.nameKey=data.workflow.AddGroupInstance links.AddGroupInstances.display.order=0.0 links.AddGroupInstances.display.icon=learning links.AddGroupInstances.display.visible=false links.AddGroupInstances.display.enabled=true links.AddGroupInstances.display.isDefault=true
	Not Displayed		links.AddIDPGoalCustomColumn.id=AddIDPGoalCustomColumn links.AddIDPGoalCustomColumn.type=data.menu.SystemAdmin links.AddIDPGoalCustomColumn.descriptionKey=label.adminQuickLinks.description.AddIDPGoalCustomColumn links.AddIDPGoalCustomColumn.nameKey=data.workflow.AddIDPGoalCustomColumn links.AddIDPGoalCustomColumn.display.order=0.0 links.AddIDPGoalCustomColumn.display.icon=systemAdmin links.AddIDPGoalCustomColumn.display.visible=false links.AddIDPGoalCustomColumn.display.enabled=true links.AddIDPGoalCustomColumn.display.isDefault=true
	Not Displayed		links.AddIDPGoals.id=AddIDPGoals links.AddIDPGoals.type=data.menu.Performance links.AddIDPGoals.descriptionKey=label.adminQuickLinks.description.AddIDPGoals links.AddIDPGoals.nameKey=data.workflow.AddIDPGoal links.AddIDPGoals.display.order=0.0 links.AddIDPGoals.display.icon=performance links.AddIDPGoals.display.visible=false links.AddIDPGoals.display.enabled=true links.AddIDPGoals.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Not Displayed		links.AddIDPPlans.id=AddIDPPlans links.AddIDPPlans.type=data.menu.Performance links.AddIDPPlans.descriptionKey=label.adminQuickLinks.description.AddIDPPlans links.AddIDPPlans.nameKey=data.workflow.AddIDPPlan links.AddIDPPlans.display.order=0.0 links.AddIDPPlans.display.icon=performance links.AddIDPPlans.display.visible=false links.AddIDPPlans.display.enabled=true links.AddIDPPlans.display.isDefault=true
	Not Displayed		links.AddInstructor.id=AddInstructor links.AddInstructor.type=data.menu.SystemAdmin links.AddInstructor.descriptionKey=label.adminQuickLinks.description.AddInstructor links.AddInstructor.nameKey=data.workflow.AddInstructorCustomColumn links.AddInstructor.display.order=0.0 links.AddInstructor.display.icon=systemAdmin links.AddInstructor.display.visible=false links.AddInstructor.display.enabled=true links.AddInstructor.display.isDefault=true
	Not Displayed		links.AddInstructors.id=AddInstructors links.AddInstructors.type=data.menu.Learning links.AddInstructors.descriptionKey=label.adminQuickLinks.description.AddInstructors links.AddInstructors.nameKey=data.workflow.AddInstructor links.AddInstructors.display.order=0.0 links.AddInstructors.display.icon=learning links.AddInstructors.display.visible=false links.AddInstructors.display.enabled=true links.AddInstructors.display.isDefault=true
	Not Displayed		links.AddJobPosition.id=AddJobPosition links.AddJobPosition.type=data.menu.SystemAdmin links.AddJobPosition.descriptionKey=label.adminQuickLinks.description.AddJobPosition links.AddJobPosition.nameKey=data.workflow.AddJobPositionCustomColumn links.AddJobPosition.display.order=0.0 links.AddJobPosition.display.icon=systemAdmin links.AddJobPosition.display.visible=false links.AddJobPosition.display.enabled=true links.AddJobPosition.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Not Displayed		links.AddJobPositions.id=AddJobPositions links.AddJobPositions.type=data.menu.Students links.AddJobPositions.descriptionKey=label.adminQuickLinks.description.AddJobPositions links.AddJobPositions.nameKey=data.workflow.AddJobPosition links.AddJobPositions.display.order=0.0 links.AddJobPositions.display.icon=students links.AddJobPositions.display.visible=false links.AddJobPositions.display.enabled=true links.AddJobPositions.display.isDefault=true
	Not Displayed		links.AddObjective.id=AddObjective links.AddObjective.type=data.menu.SystemAdmin links.AddObjective.descriptionKey=label.adminQuickLinks.description.AddObjective links.AddObjective.nameKey=data.workflow.AddObjectiveCustomColumn links.AddObjective.display.order=0.0 links.AddObjective.display.icon=systemAdmin links.AddObjective.display.visible=false links.AddObjective.display.enabled=true links.AddObjective.display.isDefault=true
	Not Displayed		links.AddObjectives.id=AddObjectives links.AddObjectives.type=label.Content links.AddObjectives.descriptionKey=label.adminQuickLinks.description.AddObjectives links.AddObjectives.nameKey=data.workflow.AddObjective links.AddObjectives.display.order=0.0 links.AddObjectives.display.icon=content links.AddObjectives.display.visible=false links.AddObjectives.display.enabled=true links.AddObjectives.display.isDefault=true
	Not Displayed		links.AddOrganizationGroups.id=AddOrganizationGroups links.AddOrganizationGroups.type=data.menu.Students links.AddOrganizationGroups.descriptionKey=label.adminQuickLinks.description.AddOrganizationGroups links.AddOrganizationGroups.nameKey=data.workflow.AddOrganizationGroup links.AddOrganizationGroups.display.order=0.0 links.AddOrganizationGroups.display.icon=students links.AddOrganizationGroups.display.visible=false links.AddOrganizationGroups.display.enabled=true links.AddOrganizationGroups.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.AddOrganization.id=AddOrganization links.AddOrganization.type=data.menu.SystemAdmin links.AddOrganization.descriptionKey=label.adminQuickLinks.description.AddOrganization links.AddOrganization.nameKey=data.workflow.AddOrganizationCustomColumn links.AddOrganization.display.order=0.0 links.AddOrganization.display.icon=systemAdmin links.AddOrganization.display.visible=false links.AddOrganization.display.enabled=true links.AddOrganization.display.isDefault=true
	Not Displayed		links.AddOrganizations.id=AddOrganizations links.AddOrganizations.type=data.menu.Students links.AddOrganizations.descriptionKey=label.adminQuickLinks.description.AddOrganizations links.AddOrganizations.nameKey=data.workflow.AddOrganization links.AddOrganizations.display.order=0.0 links.AddOrganizations.display.icon=students links.AddOrganizations.display.visible=false links.AddOrganizations.display.enabled=true links.AddOrganizations.display.isDefault=true
	Not Displayed		links.AddPerformanceReviewProcess.id=AddPerformanceReviewProcess links.AddPerformanceReviewProcess.type=data.menu.Performance links.AddPerformanceReviewProcess.descriptionKey=label.adminQuickLinks.description.AddPerformanceReviewProcess links.AddPerformanceReviewProcess.nameKey=data.workflow.AddPerformanceReviewProcess links.AddPerformanceReviewProcess.display.order=0.0 links.AddPerformanceReviewProcess.display.icon=performance links.AddPerformanceReviewProcess.display.visible=false links.AddPerformanceReviewProcess.display.enabled=true links.AddPerformanceReviewProcess.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Not Displayed		links.AddPerformanceReviewTemplate.id=AddPerformanceReviewTemplate links.AddPerformanceReviewTemplate.type=data.menu.Performance links.AddPerformanceReviewTemplate.descriptionKey=label.adminQuickLinks.description.AddPerformanceReviewTemplate links.AddPerformanceReviewTemplate.nameKey=data.workflow.AddPerformanceReviewTemplate links.AddPerformanceReviewTemplate.display.order=0.0 links.AddPerformanceReviewTemplate.display.icon=performance links.AddPerformanceReviewTemplate.display.visible=false links.AddPerformanceReviewTemplate.display.enabled=true links.AddPerformanceReviewTemplate.display.isDefault=true
	Not Displayed		links.AddPositionNumbers.id=AddPositionNumbers links.AddPositionNumbers.type=data.menu.SystemAdmin links.AddPositionNumbers.descriptionKey=label.adminQuickLinks.description.AddPositionNumbers links.AddPositionNumbers.nameKey=data.workflow.AddPositionNumber links.AddPositionNumbers.display.order=0.0 links.AddPositionNumbers.display.icon=systemAdmin links.AddPositionNumbers.display.visible=false links.AddPositionNumbers.display.enabled=true links.AddPositionNumbers.display.isDefault=true
	Not Displayed		links.AddProficiencyProfiles.id=AddProficiencyProfiles links.AddProficiencyProfiles.type=data.menu.Performance links.AddProficiencyProfiles.descriptionKey=label.adminQuickLinks.description.AddProficiencyProfiles links.AddProficiencyProfiles.nameKey=data.workflow.AddProficiencyProfile links.AddProficiencyProfiles.display.order=0.0 links.AddProficiencyProfiles.display.icon=performance links.AddProficiencyProfiles.display.visible=false links.AddProficiencyProfiles.display.enabled=true links.AddProficiencyProfiles.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.AddQualification.id=AddQualification links.AddQualification.type=data.menu.SystemAdmin links.AddQualification.descriptionKey=label.adminQuickLinks.description.AddQualification links.AddQualification.nameKey=data.workflow.AddQualificationCustomColumn links.AddQualification.display.order=0.0 links.AddQualification.display.icon=systemAdmin links.AddQualification.display.visible=false links.AddQualification.display.enabled=true links.AddQualification.display.isDefault=true
	Not Displayed		links.AddQualifications.id=AddQualifications links.AddQualifications.type=data.menu.Learning links.AddQualifications.descriptionKey=label.adminQuickLinks.description.AddQualifications links.AddQualifications.nameKey=data.workflow.AddQualification links.AddQualifications.display.order=0.0 links.AddQualifications.display.icon=learning links.AddQualifications.display.visible=false links.AddQualifications.display.enabled=true links.AddQualifications.display.isDefault=true
	Not Displayed		links.AddQuestion.id=AddQuestion links.AddQuestion.type=data.menu.SystemAdmin links.AddQuestion.descriptionKey=label.adminQuickLinks.description.AddQuestion links.AddQuestion.nameKey=data.workflow.AddQuestionCustomColumn links.AddQuestion.display.order=0.0 links.AddQuestion.display.icon=systemAdmin links.AddQuestion.display.visible=false links.AddQuestion.display.enabled=true links.AddQuestion.display.isDefault=true
	Not Displayed		links.AddQuestionnaireSurveys.id=AddQuestionnaireSurveys links.AddQuestionnaireSurveys.type=data.menu.Learning links.AddQuestionnaireSurveys.descriptionKey=label.adminQuickLinks.description.AddQuestionnaireSurveys links.AddQuestionnaireSurveys.nameKey=data.workflow.questionnaireSurvey.AddSurvey links.AddQuestionnaireSurveys.display.order=0.0 links.AddQuestionnaireSurveys.display.icon=learning links.AddQuestionnaireSurveys.display.visible=false links.AddQuestionnaireSurveys.display.enabled=true links.AddQuestionnaireSurveys.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.AddQuestions.id=AddQuestions links.AddQuestions.type=label.Content links.AddQuestions.descriptionKey=label.adminQuickLinks.description.AddQuestions links.AddQuestions.nameKey=data.workflow.AddQuestion links.AddQuestions.display.order=0.0 links.AddQuestions.display.icon=content links.AddQuestions.display.visible=false links.AddQuestions.display.enabled=true links.AddQuestions.display.isDefault=true
	Not Displayed		links.AddRegions.id=AddRegions links.AddRegions.type=data.menu.Students links.AddRegions.descriptionKey=label.adminQuickLinks.description.AddRegions links.AddRegions.nameKey=data.workflow.AddRegion links.AddRegions.display.order=0.0 links.AddRegions.display.icon=students links.AddRegions.display.visible=false links.AddRegions.display.enabled=true links.AddRegions.display.isDefault=true
	Not Displayed		links.AddRequirements.id=AddRequirements links.AddRequirements.type=data.menu.Learning links.AddRequirements.descriptionKey=label.adminQuickLinks.description.AddRequirements links.AddRequirements.nameKey=data.workflow.AddRequirement links.AddRequirements.display.order=0.0 links.AddRequirements.display.icon=learning links.AddRequirements.display.visible=false links.AddRequirements.display.enabled=true links.AddRequirements.display.isDefault=true
	Not Displayed		links.AddRoleManagement.id=AddRoleManagement links.AddRoleManagement.type=data.menu.SystemAdmin links.AddRoleManagement.descriptionKey=label.adminQuickLinks.description.AddRoleManagement links.AddRoleManagement.nameKey=data.workflow.AddRole links.AddRoleManagement.display.order=0.0 links.AddRoleManagement.display.icon=systemAdmin links.AddRoleManagement.display.visible=false links.AddRoleManagement.display.enabled=true links.AddRoleManagement.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Not Displayed		links.AddRoleManagement.id=AddRoleManagement links.AddRoleManagement.type=data.menu.SystemAdmin links.AddRoleManagement.descriptionKey=label.adminQuickLinks.description.AddRoleManagement links.AddRoleManagement.nameKey=data.workflow.AddRole links.AddRoleManagement.display.order=0.0 links.AddRoleManagement.display.icon=systemAdmin links.AddRoleManagement.display.visible=false links.AddRoleManagement.display.enabled=true links.AddRoleManagement.display.isDefault=true
5	Displayed		links.AddScheduleInstances.id=AddScheduleInstances links.AddScheduleInstances.type=data.menu.Learning links.AddScheduleInstances.descriptionKey=label.adminQuickLinks.description.AddScheduleInstances links.AddScheduleInstances.nameKey=data.workflow.AddScheduleInstance links.AddScheduleInstances.display.order=5.0 links.AddScheduleInstances.display.icon=learning links.AddScheduleInstances.display.visible=true links.AddScheduleInstances.display.enabled=true links.AddScheduleInstances.display.isDefault=true
	Not Displayed		links.AddSchedule.id=AddSchedule links.AddSchedule.type=data.menu.SystemAdmin links.AddSchedule.descriptionKey=label.adminQuickLinks.description.AddSchedule links.AddSchedule.nameKey=data.workflow.AddScheduleCustomColumn links.AddSchedule.display.order=0.0 links.AddSchedule.display.icon=systemAdmin links.AddSchedule.display.visible=false links.AddSchedule.display.enabled=true links.AddSchedule.display.isDefault=true
	Not Displayed		links.AddSite.id=AddSite links.AddSite.type=data.menu.SystemAdmin links.AddSite.descriptionKey=label.adminQuickLinks.description.AddSite links.AddSite.nameKey=data.workflow.AddSite links.AddSite.display.order=0.0 links.AddSite.display.icon=systemAdmin links.AddSite.display.visible=false links.AddSite.display.enabled=true links.AddSite.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
2	Displayed		links.AddStudentInformation.id=AddStudentInformation links.AddStudentInformation.type=data.menu.Students links.AddStudentInformation.descriptionKey=label.adminQuickLinks.description.AddStudentInformation links.AddStudentInformation.nameKey=data.workflow.AddStudent links.AddStudentInformation.display.order=2.0 links.AddStudentInformation.display.icon=students links.AddStudentInformation.display.visible=true links.AddStudentInformation.display.enabled=true links.AddStudentInformation.display.isDefault=true
	Not Displayed		links.AddStudentIntroduction.id=AddStudentIntroduction links.AddStudentIntroduction.type=data.menu.SystemAdmin links.AddStudentIntroduction.descriptionKey=label.adminQuickLinks.description.AddStudentIntroduction links.AddStudentIntroduction.nameKey=data.workflow.AddStudentIntroduction links.AddStudentIntroduction.display.order=0.0 links.AddStudentIntroduction.display.icon=systemAdmin links.AddStudentIntroduction.display.visible=false links.AddStudentIntroduction.display.enabled=true links.AddStudentIntroduction.display.isDefault=true
	Not Displayed		links.AddStudent.id=AddStudent links.AddStudent.type=data.menu.SystemAdmin links.AddStudent.descriptionKey=label.adminQuickLinks.description.AddStudent links.AddStudent.nameKey=data.workflow.AddStudentCustomColumn links.AddStudent.display.order=0.0 links.AddStudent.display.icon=systemAdmin links.AddStudent.display.visible=false links.AddStudent.display.enabled=true links.AddStudent.display.isDefault=true
	Not Displayed		links.AddTasks.id=AddTasks links.AddTasks.type=data.menu.Learning links.AddTasks.descriptionKey=label.adminQuickLinks.description.AddTasks links.AddTasks.nameKey=data.workflow.AddTask links.AddTasks.display.order=0.0 links.AddTasks.display.icon=learning links.AddTasks.display.visible=false links.AddTasks.display.enabled=true links.AddTasks.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.AddUserManagement.id=AddUserManagement links.AddUserManagement.type=data.menu.SystemAdmin links.AddUserManagement.descriptionKey=label.adminQuickLinks.description.AddUserManagement links.AddUserManagement.nameKey=data.workflow.AddUserProfile links.AddUserManagement.display.order=0.0 links.AddUserManagement.display.icon=systemAdmin links.AddUserManagement.display.visible=false links.AddUserManagement.display.enabled=true links.AddUserManagement.display.isDefault=true
	Not Displayed		links.ToolsAICCImportAssistant.id=ToolsAICCImportAssistant links.ToolsAICCImportAssistant.type=label.Content links.ToolsAICCImportAssistant.descriptionKey=label.adminQuickLinks.description.ToolsAICCImportAssistant links.ToolsAICCImportAssistant.nameKey=data.menu.AICCImportAssistant links.ToolsAICCImportAssistant.display.order=0.0 links.ToolsAICCImportAssistant.display.icon=content links.ToolsAICCImportAssistant.display.visible=false links.ToolsAICCImportAssistant.display.enabled=true links.ToolsAICCImportAssistant.display.isDefault=true
	Not Displayed		links.ToolsAttachmentsUtilization.id=ToolsAttachmentsUtilization links.ToolsAttachmentsUtilization.type=data.menu.SystemAdmin links.ToolsAttachmentsUtilization.descriptionKey=label.adminQuickLinks.description.ToolsAttachmentsUtilization links.ToolsAttachmentsUtilization.nameKey=data.menu.AttachmentsUtilization links.ToolsAttachmentsUtilization.display.order=0.0 links.ToolsAttachmentsUtilization.display.icon=systemAdmin links.ToolsAttachmentsUtilization.display.visible=false links.ToolsAttachmentsUtilization.display.enabled=true links.ToolsAttachmentsUtilization.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.ToolsCancelScheduleInstance.id=ToolsCancelScheduleInstance links.ToolsCancelScheduleInstance.type=data.menu.Learning links.ToolsCancelScheduleInstance.descriptionKey=label.adminQuickLinks.description.ToolsCancelScheduleInstance links.ToolsCancelScheduleInstance.nameKey=data.menu.CancelScheduleInstance links.ToolsCancelScheduleInstance.display.order=0.0 links.ToolsCancelScheduleInstance.display.icon=learning links.ToolsCancelScheduleInstance.display.visible=false links.ToolsCancelScheduleInstance.display.enabled=true links.ToolsCancelScheduleInstance.display.isDefault=true
	Not Displayed		links.ToolsCatalogPriceChangeAssistant.id=ToolsCatalogPriceChangeAssistant links.ToolsCatalogPriceChangeAssistant.type=tab.Commerce links.ToolsCatalogPriceChangeAssistant.descriptionKey=label.adminQuickLinks.description.ToolsCatalogPriceChangeAssistant links.ToolsCatalogPriceChangeAssistant.nameKey=data.menu.CatalogPriceChangeAssistant links.ToolsCatalogPriceChangeAssistant.display.order=0.0 links.ToolsCatalogPriceChangeAssistant.display.icon=commerce links.ToolsCatalogPriceChangeAssistant.display.visible=false links.ToolsCatalogPriceChangeAssistant.display.enabled=true links.ToolsCatalogPriceChangeAssistant.display.isDefault=true
	Not Displayed		links.ToolsChargebackAdjustment.id=ToolsChargebackAdjustment links.ToolsChargebackAdjustment.type=tab.Commerce links.ToolsChargebackAdjustment.descriptionKey=label.adminQuickLinks.description.ToolsChargebackAdjustment links.ToolsChargebackAdjustment.nameKey=data.menu.ChargebackAdjustment links.ToolsChargebackAdjustment.display.order=0.0 links.ToolsChargebackAdjustment.display.icon=commerce links.ToolsChargebackAdjustment.display.visible=false links.ToolsChargebackAdjustment.display.enabled=true links.ToolsChargebackAdjustment.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.ToolsCloseScheduleInstance.id=ToolsCloseScheduleInstance links.ToolsCloseScheduleInstance.type=data.menu.Learning links.ToolsCloseScheduleInstance.descriptionKey=label.adminQuickLinks.description.ToolsCloseScheduleInstance links.ToolsCloseScheduleInstance.nameKey=data.menu.CloseScheduleInstance links.ToolsCloseScheduleInstance.display.order=0.0 links.ToolsCloseScheduleInstance.display.icon=learning links.ToolsCloseScheduleInstance.display.visible=false links.ToolsCloseScheduleInstance.display.enabled=true links.ToolsCloseScheduleInstance.display.isDefault=true
	Not Displayed		links.ToolsCompetencyAssessmentEditor.id=ToolsCompetencyAssessmentEditor links.ToolsCompetencyAssessmentEditor.type=data.menu.Performance links.ToolsCompetencyAssessmentEditor.descriptionKey=label.adminQuickLinks.description.ToolsCompetencyAssessmentEditor links.ToolsCompetencyAssessmentEditor.nameKey=data.menu.CompetencyAssessmentEditor links.ToolsCompetencyAssessmentEditor.display.order=0.0 links.ToolsCompetencyAssessmentEditor.display.icon=performance links.ToolsCompetencyAssessmentEditor.display.visible=false links.ToolsCompetencyAssessmentEditor.display.enabled=true links.ToolsCompetencyAssessmentEditor.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Not Displayed		links.ToolsCompetencyAssessmentRecorder.id=ToolsCompetencyAssessmentRecorder links.ToolsCompetencyAssessmentRecorder.type=data.menu.Performance links.ToolsCompetencyAssessmentRecorder.descriptionKey=label.adminQuickLinks.description.ToolsCompetencyAssessmentRecorder links.ToolsCompetencyAssessmentRecorder.nameKey=data.menu.CompetencyAssessmentRecorder links.ToolsCompetencyAssessmentRecorder.display.order=0.0 links.ToolsCompetencyAssessmentRecorder.display.icon=performance links.ToolsCompetencyAssessmentRecorder.display.visible=false links.ToolsCompetencyAssessmentRecorder.display.enabled=true links.ToolsCompetencyAssessmentRecorder.display.isDefault=true
	Not Displayed		links.ToolsCreateDirectLinkAssistant.id=ToolsCreateDirectLinkAssistant links.ToolsCreateDirectLinkAssistant.type=data.menu.SystemAdmin links.ToolsCreateDirectLinkAssistant.descriptionKey=label.adminQuickLinks.description.ToolsCreateDirectLinkAssistant links.ToolsCreateDirectLinkAssistant.nameKey=data.menu.DirectLink links.ToolsCreateDirectLinkAssistant.display.order=0.0 links.ToolsCreateDirectLinkAssistant.display.icon=systemAdmin links.ToolsCreateDirectLinkAssistant.display.visible=false links.ToolsCreateDirectLinkAssistant.display.enabled=true links.ToolsCreateDirectLinkAssistant.display.isDefault=true
	Not Displayed		links.ToolsEnrollmentAssistant.id=ToolsEnrollmentAssistant links.ToolsEnrollmentAssistant.type=data.menu.Learning links.ToolsEnrollmentAssistant.descriptionKey=label.adminQuickLinks.description.ToolsEnrollmentAssistant links.ToolsEnrollmentAssistant.nameKey=data.menu.EnrollmentAssistant links.ToolsEnrollmentAssistant.display.order=0.0 links.ToolsEnrollmentAssistant.display.icon=learning links.ToolsEnrollmentAssistant.display.visible=false links.ToolsEnrollmentAssistant.display.enabled=true links.ToolsEnrollmentAssistant.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.ToolsEntityImport.id=ToolsEntityImport links.ToolsEntityImport.type=data.menu.SystemAdmin links.ToolsEntityImport.descriptionKey=label.adminQuickLinks.description.ToolsEntityImport links.ToolsEntityImport.nameKey=data.menu.EntityImport links.ToolsEntityImport.display.order=0.0 links.ToolsEntityImport.display.icon=systemAdmin links.ToolsEntityImport.display.visible=false links.ToolsEntityImport.display.enabled=true links.ToolsEntityImport.display.isDefault=true
	Not Displayed		links.ToolsImport/ExportLabels.id=ToolsImport/ExportLabels links.ToolsImport/ExportLabels.type=data.menu.SystemAdmin links.ToolsImport/ExportLabels.descriptionKey=label.adminQuickLinks.description.ToolsImport/ExportLabels links.ToolsImport/ExportLabels.nameKey=data.menu.ImportExportResources links.ToolsImport/ExportLabels.display.order=0.0 links.ToolsImport/ExportLabels.display.icon=systemAdmin links.ToolsImport/ExportLabels.display.visible=false links.ToolsImport/ExportLabels.display.enabled=true links.ToolsImport/ExportLabels.display.isDefault=true
	Not Displayed		links.ToolsInventoryAssistant.id=ToolsInventoryAssistant links.ToolsInventoryAssistant.type=data.menu.Learning links.ToolsInventoryAssistant.descriptionKey=label.adminQuickLinks.description.ToolsInventoryAssistant links.ToolsInventoryAssistant.nameKey=data.menu.InventoryAssistant links.ToolsInventoryAssistant.display.order=1.0 links.ToolsInventoryAssistant.display.icon=learning links.ToolsInventoryAssistant.display.visible=false links.ToolsInventoryAssistant.display.enabled=false links.ToolsInventoryAssistant.display.isDefault=true
	Not Displayed		links.ToolsLearningEventEditor.id=ToolsLearningEventEditor links.ToolsLearningEventEditor.type=data.menu.Students links.ToolsLearningEventEditor.descriptionKey=label.adminQuickLinks.description.ToolsLearningEventEditor links.ToolsLearningEventEditor.nameKey=data.menu.LearningEventEditor links.ToolsLearningEventEditor.display.order=0.0 links.ToolsLearningEventEditor.display.icon=students links.ToolsLearningEventEditor.display.visible=false links.ToolsLearningEventEditor.display.enabled=true links.ToolsLearningEventEditor.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
7	Displayed		links.ToolsLearningEventRecorderMultiple.id=ToolsLearningEventRecorderMultiple links.ToolsLearningEventRecorderMultiple.type=data.menu.Students links.ToolsLearningEventRecorderMultiple.descriptionKey=label.adminQuickLinks.description.ToolsLearningEventRecorderMultiple links.ToolsLearningEventRecorderMultiple.nameKey=data.menu.LearningEventRecorderMultiple links.ToolsLearningEventRecorderMultiple.display.order=7.0 links.ToolsLearningEventRecorderMultiple.display.icon=students links.ToolsLearningEventRecorderMultiple.display.visible=true links.ToolsLearningEventRecorderMultiple.display.enabled=true links.ToolsLearningEventRecorderMultiple.display.isDefault=true
	Not Displayed		links.ToolsLearningEventRecorder.id=ToolsLearningEventRecorder links.ToolsLearningEventRecorder.type=data.menu.Students links.ToolsLearningEventRecorder.descriptionKey=label.adminQuickLinks.description.ToolsLearningEventRecorder links.ToolsLearningEventRecorder.nameKey=data.menu.LearningEventRecorder links.ToolsLearningEventRecorder.display.order=0.0 links.ToolsLearningEventRecorder.display.icon=students links.ToolsLearningEventRecorder.display.visible=false links.ToolsLearningEventRecorder.display.enabled=true links.ToolsLearningEventRecorder.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.ToolsMasterInventoryPriceChangeAssistant.id=ToolsMasterInventoryPriceChangeAssistant links.ToolsMasterInventoryPriceChangeAssistant.type=tab.Commerce links.ToolsMasterInventoryPriceChangeAssistant.descriptionKey=label.adminQuickLinks.description.ToolsMasterInventoryPriceChangeAssistant links.ToolsMasterInventoryPriceChangeAssistant.nameKey=data.menu.MasterInventoryPriceChangeAssistant links.ToolsMasterInventoryPriceChangeAssistant.display.order=0.0 links.ToolsMasterInventoryPriceChangeAssistant.display.icon=commerce links.ToolsMasterInventoryPriceChangeAssistant.display.visible=false links.ToolsMasterInventoryPriceChangeAssistant.display.enabled=true links.ToolsMasterInventoryPriceChangeAssistant.display.isDefault=true
	Not Displayed		links.ToolsMergeStudents.id=ToolsMergeStudents links.ToolsMergeStudents.type=data.menu.Students links.ToolsMergeStudents.descriptionKey=label.adminQuickLinks.description.ToolsMergeStudents links.ToolsMergeStudents.nameKey=data.menu.MergeUsers links.ToolsMergeStudents.display.order=0.0 links.ToolsMergeStudents.display.icon=students links.ToolsMergeStudents.display.visible=false links.ToolsMergeStudents.display.enabled=true links.ToolsMergeStudents.display.isDefault=true
	Not Displayed		links.ToolsPrintedExamTemplate.id=ToolsPrintedExamTemplate links.ToolsPrintedExamTemplate.type=label.Content links.ToolsPrintedExamTemplate.descriptionKey=label.adminQuickLinks.description.ToolsPrintedExamTemplate links.ToolsPrintedExamTemplate.nameKey=data.menu.PrintedExamTemplate links.ToolsPrintedExamTemplate.display.order=0.0 links.ToolsPrintedExamTemplate.display.icon=content links.ToolsPrintedExamTemplate.display.visible=false links.ToolsPrintedExamTemplate.display.enabled=true links.ToolsPrintedExamTemplate.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.ToolsPurchasingAssistant.id=ToolsPurchasingAssistant links.ToolsPurchasingAssistant.type=tab.Commerce links.ToolsPurchasingAssistant.descriptionKey=label.adminQuickLinks.description.ToolsPurchasingAssistant links.ToolsPurchasingAssistant.nameKey=data.menu.PurchasingAssistant links.ToolsPurchasingAssistant.display.order=0.0 links.ToolsPurchasingAssistant.display.icon=commerce links.ToolsPurchasingAssistant.display.visible=false links.ToolsPurchasingAssistant.display.enabled=true links.ToolsPurchasingAssistant.display.isDefault=true
	Not Displayed		links.ToolsQualificationScheduling.id=ToolsQualificationScheduling links.ToolsQualificationScheduling.type=data.menu.Learning links.ToolsQualificationScheduling.descriptionKey=label.adminQuickLinks.description.ToolsQualificationScheduling links.ToolsQualificationScheduling.nameKey=data.menu.QualificationScheduling links.ToolsQualificationScheduling.display.order=0.0 links.ToolsQualificationScheduling.display.icon=learning links.ToolsQualificationScheduling.display.visible=false links.ToolsQualificationScheduling.display.enabled=true links.ToolsQualificationScheduling.display.isDefault=true
	Not Displayed		links.ToolsQuestionImportExportAssistant.id=ToolsQuestionImportExportAssistant links.ToolsQuestionImportExportAssistant.type=label.Content links.ToolsQuestionImportExportAssistant.descriptionKey=label.adminQuickLinks.description.ToolsQuestionImportExportAssistant links.ToolsQuestionImportExportAssistant.nameKey=data.menu.QuestionImportExportAssistant links.ToolsQuestionImportExportAssistant.display.order=0.0 links.ToolsQuestionImportExportAssistant.display.icon=content links.ToolsQuestionImportExportAssistant.display.visible=false links.ToolsQuestionImportExportAssistant.display.enabled=true links.ToolsQuestionImportExportAssistant.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Not Displayed		links.ToolsRequiredDatesAssistant.id=ToolsRequiredDatesAssistant links.ToolsRequiredDatesAssistant.type=data.menu.Learning links.ToolsRequiredDatesAssistant.descriptionKey=label.adminQuickLinks.description.ToolsRequiredDatesAssistant links.ToolsRequiredDatesAssistant.nameKey=data.menu.RequiredDatesAssistant links.ToolsRequiredDatesAssistant.display.order=0.0 links.ToolsRequiredDatesAssistant.display.icon=learning links.ToolsRequiredDatesAssistant.display.visible=false links.ToolsRequiredDatesAssistant.display.enabled=true links.ToolsRequiredDatesAssistant.display.isDefault=true
	Not Displayed		links.ToolsSCORMImportAssistant.id=ToolsSCORMImportAssistant links.ToolsSCORMImportAssistant.type=label.Content links.ToolsSCORMImportAssistant.descriptionKey=label.adminQuickLinks.description.ToolsSCORMImportAssistant links.ToolsSCORMImportAssistant.nameKey=data.menu.SCORMImportAssistant links.ToolsSCORMImportAssistant.display.order=0.0 links.ToolsSCORMImportAssistant.display.icon=content links.ToolsSCORMImportAssistant.display.visible=false links.ToolsSCORMImportAssistant.display.enabled=true links.ToolsSCORMImportAssistant.display.isDefault=true
	Not Displayed		links.ToolsScheduleInstanceNotificationAssistant.id=ToolsScheduleInstanceNotificationAssistant links.ToolsScheduleInstanceNotificationAssistant.type=data.menu.Learning links.ToolsScheduleInstanceNotificationAssistant.descriptionKey=label.adminQuickLinks.description.ToolsScheduleInstanceNotificationAssistant links.ToolsScheduleInstanceNotificationAssistant.nameKey=data.menu.ScheduleInstanceNotificationAssistant links.ToolsScheduleInstanceNotificationAssistant.display.order=0.0 links.ToolsScheduleInstanceNotificationAssistant.display.icon=learning links.ToolsScheduleInstanceNotificationAssistant.display.visible=false links.ToolsScheduleInstanceNotificationAssistant.display.enabled=true links.ToolsScheduleInstanceNotificationAssistant.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.ToolsSendNotificationsAssistant.id=ToolsSendNotificationsAssistant links.ToolsSendNotificationsAssistant.type=data.menu.Students links.ToolsSendNotificationsAssistant.descriptionKey=label.adminQuickLinks.description.ToolsSendNotificationsAssistant links.ToolsSendNotificationsAssistant.nameKey=data.menu.SendNotifications links.ToolsSendNotificationsAssistant.display.order=0.0 links.ToolsSendNotificationsAssistant.display.icon=students links.ToolsSendNotificationsAssistant.display.visible=false links.ToolsSendNotificationsAssistant.display.enabled=true links.ToolsSendNotificationsAssistant.display.isDefault=true
8	Displayed		links.ToolsStudentNeedsManagement.id=ToolsStudentNeedsManagement links.ToolsStudentNeedsManagement.type=data.menu.Students links.ToolsStudentNeedsManagement.descriptionKey=label.adminQuickLinks.description.ToolsStudentNeedsManagement links.ToolsStudentNeedsManagement.nameKey=data.menu.StudentNeedsMgmt links.ToolsStudentNeedsManagement.display.order=8.0 links.ToolsStudentNeedsManagement.display.icon=students links.ToolsStudentNeedsManagement.display.visible=true links.ToolsStudentNeedsManagement.display.enabled=true links.ToolsStudentNeedsManagement.display.isDefault=true
	Not Displayed		links.ToolsSuccessionPlanning.id=ToolsSuccessionPlanning links.ToolsSuccessionPlanning.type=data.menu.Performance links.ToolsSuccessionPlanning.descriptionKey=label.adminQuickLinks.description.ToolsSuccessionPlanning links.ToolsSuccessionPlanning.nameKey=data.menu.SuccessionPlanning links.ToolsSuccessionPlanning.display.order=0.0 links.ToolsSuccessionPlanning.display.icon=performance links.ToolsSuccessionPlanning.display.visible=false links.ToolsSuccessionPlanning.display.enabled=true links.ToolsSuccessionPlanning.display.isDefault=true

ADMIN QUICK LINKS			
Order of Display	Default Value	Chosen Value	Description
	Not Displayed		links.ToolsSupervisorAssistant.id=ToolsSupervisorAssistant links.ToolsSupervisorAssistant.type=label.Students links.ToolsSupervisorAssistant.descriptionKey=label.adminQuickLinks.description.ToolsSupervisorAssistant links.ToolsSupervisorAssistant.nameKey=data.menu.SupervisorAssistant links.ToolsSupervisorAssistant.display.order=0.0 links.ToolsSupervisorAssistant.display.icon=students links.ToolsSupervisorAssistant.display.visible=false links.ToolsSupervisorAssistant.display.enabled=true links.ToolsSupervisorAssistant.display.isDefault=true
#	Displayed		links.CreateOnlineCourse.id=CreateOnlineCourse links.CreateOnlineCourse.type=label.adminQuickLinks.Group links.CreateOnlineCourse.descriptionKey=label.adminQuickLinks.description.CreateOnlineCourse links.CreateOnlineCourse.nameKey=label.adminQuickLinks.name.CreateOnlineCourse links.CreateOnlineCourse.display.order=0.0 links.CreateOnlineCourse.display.icon=group links.CreateOnlineCourse.display.visible=true links.CreateOnlineCourse.display.enabled=true links.CreateOnlineCourse.display.isDefault=true
	Not Displayed		links.CreateOnlineCourse.childrenDisplay.ToolsSCORMImportAssistant.order=0.0 links.CreateOnlineCourse.childrenDisplay.ToolsSCORMImportAssistant.visible=true links.CreateOnlineCourse.childrenDisplay.ToolsSCORMImportAssistant.enabled=true links.CreateOnlineCourse.childrenDisplay.ToolsSCORMImportAssistant.isDefault=true links.CreateOnlineCourse.childrenDisplay.ToolsSCORMImportAssistant.icon=content

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Displayed		links.CreateOnlineCourse.childrenDisplay.AddQualifications.order=1.0 links.CreateOnlineCourse.childrenDisplay.AddQualifications.visible=true links.CreateOnlineCourse.childrenDisplay.AddQualifications.enabled=true links.CreateOnlineCourse.childrenDisplay.AddQualifications.isDefault=true links.CreateOnlineCourse.childrenDisplay.AddQualifications.icon=learning links.CreateOnlineCourse.childrenDisplay.ToolsStudentNeedsManagement.order=2.0 links.CreateOnlineCourse.childrenDisplay.ToolsStudentNeedsManagement.visible=true links.CreateOnlineCourse.childrenDisplay.ToolsStudentNeedsManagement.enabled=true links.CreateOnlineCourse.childrenDisplay.ToolsStudentNeedsManagement.isDefault=true links.CreateOnlineCourse.childrenDisplay.ToolsStudentNeedsManagement.icon=students
1	Displayed		links.CreateInstructorLedCourse.id=CreateInstructorLedCourse links.CreateInstructorLedCourse.type=label.adminQuickLinks.Group links.CreateInstructorLedCourse.descriptionKey=label.adminQuickLinks.description.CreateInstructorLedCourse links.CreateInstructorLedCourse.nameKey=label.adminQuickLinks.name.CreateInstructorLedCourse links.CreateInstructorLedCourse.display.order=1.0 links.CreateInstructorLedCourse.display.icon=group links.CreateInstructorLedCourse.display.visible=true links.CreateInstructorLedCourse.display.enabled=true links.CreateInstructorLedCourse.display.isDefault=true
	Not Displayed		links.CreateInstructorLedCourse.childrenDisplay.AddComponents.order=0.0 links.CreateInstructorLedCourse.childrenDisplay.AddComponents.visible=true links.CreateInstructorLedCourse.childrenDisplay.AddComponents.enabled=true links.CreateInstructorLedCourse.childrenDisplay.AddComponents.isDefault=true links.CreateInstructorLedCourse.childrenDisplay.AddComponents.icon=learning

ADMIN QUICK LINKS			
Order of Display	**Default Value**	**Chosen Value**	**Description**
	Displayed		links.CreateInstructorLedCourse.childrenDisplay.AddQualifications.order=1.0 links.CreateInstructorLedCourse.childrenDisplay.AddQualifications.visible=true links.CreateInstructorLedCourse.childrenDisplay.AddQualifications.enabled=true links.CreateInstructorLedCourse.childrenDisplay.AddQualifications.isDefault=true links.CreateInstructorLedCourse.childrenDisplay.AddQualifications.icon=learning
	Displayed		links.CreateInstructorLedCourse.childrenDisplay.ToolsStudentNeedsManagement.order=2.0 links.CreateInstructorLedCourse.childrenDisplay.ToolsStudentNeedsManagement.visible=true links.CreateInstructorLedCourse.childrenDisplay.ToolsStudentNeedsManagement.enabled=true links.CreateInstructorLedCourse.childrenDisplay.ToolsStudentNeedsManagement.isDefault=true links.CreateInstructorLedCourse.childrenDisplay.ToolsStudentNeedsManagement.icon=students
	Displayed		links.CreateInstructorLedCourse.childrenDisplay.ToolsEnrollmentAssistant.order=3.0 links.CreateInstructorLedCourse.childrenDisplay.ToolsEnrollmentAssistant.visible=true links.CreateInstructorLedCourse.childrenDisplay.ToolsEnrollmentAssistant.enabled=true links.CreateInstructorLedCourse.childrenDisplay.ToolsEnrollmentAssistant.isDefault=true

17.4.2 ATTACHMENT

The Attachment configuration contains the document attachment settings.
System Admin > Configuration > System Configuration > ATTACHMENT

ATTACHMENT		
Default Value	**Chosen Value**	**Description**
[jpeg]=true		supportedAttachmentTypes[*file extension*]=true This is a list of the supported attachment(file) types that will considered as a valid attachment. The values are not case sensitive. You can add to this list using the format shown to the left. To remove a file type simply comment out the line or delete the line.
[jpg]=true		
[png]=true		
[doc]=true		
[pdf]=true		
[xls]=true		
[xlsx]=true		
[ppt]=true		
[txt]=true		
[xml]=true		

ATTACHMENT		
Default Value	**Chosen Value**	**Description**
		Additional file types can be listed here.
800		maximumSizePerAttachmentKB=800 The maximum size of a single attachment in KB. 1KB=1024 bytes
2048000		totalAttachmentsSpaceAllocatedKB=2048000 Total attachment space allocated in KB

17.4.3 AUTHENTICATION

The Authentication file contains general security settings and process information.
System Admin > Configuration > System Configuration > AUTHENTICATION

AUTHENTICATION		
Default Value	**Chosen Value**	**Description**
False		casEnabled=false The authentication settings are set to true if CAS is enabled for Single Sign On
True		crossAppEnabled=true Set to true if related admins and users can switch between the admin and user interface without re-logging in
1800 (seconds)		httpSessionTimeout=1800 The value of HTTPSessionTimeout is passed to HTTPSession.setMaxInactiveInterval() each time a session is created. 1800 represents seconds and is equal to 30 minutes. This overrides the value specified in web.xml for the session timeout (in the session-config/session-timeout element).
Admin – true User - true		loginPolicy.ADMIN.lockout=true loginPolicy.USER.lockout=true Determines the system behavior during user login process. "Lockout" enables/disables the check for the number of times an admin/user tries to login. # If it is set to true the LMS will lock out the admin/user after n login failures (The number of login failures can be set in Admin/System Admin/Login Attempts). If it is set to false the number of login failures cannot be edited and the admin/user may attempt to login any number of times.
Admin – true User - true		loginPolicy.ADMIN.forcePasswordExpiration=true loginPolicy.USER.forcePasswordExpiration=true Specifies to turn on or off the "immediately change password" feature. This allows clients with LDAP to turn this feature off, which prevents users from having to immediately change their passwords (after first login or after administrator forced password reset).
Admin – true User - true		loginPolicy.ADMIN.caseSensitivePassword=true loginPolicy.USER.caseSensitivePassword=true Specifies whether the password match during User login should be a case sensitive match or not.

AUTHENTICATION		
Default Value	**Chosen Value**	**Description**
Admin – true User - true		loginPolicy.ADMIN.caseSensitiveID=true loginPolicy.USER.caseSensitiveID=true If the userId element is set to true, then end user IDs are case sensitive. The end user IDs JOHN_DOE and john_doe are treated as two different IDs. If set to false, then JOHN_DOE and john_doe are treated as the same ID. The adminId element has the same behavior, but it applies to administrator IDs and not end user IDs. By default both the adminId element and the userId element are set to true. The system won't allow duplicate users with Ids differ only in case to be created if the element is turned off

17.4.4 CONNECTORS

This configuration contains the properties for the SuccessFactors connectors. The connectors allow an administrator to input and update various types of data/entities. The configuration settings in this file impact the connectors that are scheduled via System Admin > Connectors in the Administrator Interface.

System Admin > Configuration > System Configuration > CONNECTORS

CONNECTORS		
Default Value	**Chosen Value**	**Description**
Input File Settings		
FTP		connector.input.file.location=FTP Indicates location of the input files used during connector runs. Possible values for input.file.location: FTP, local. SaaS customers must use the FTP value.
/home/connector/InputFiles		connector.ftp.input.remoteDirectory=/home/connector/InputFiles Input file location. If input file will be placed on an FTP server, specify the absolute path to the directory.
/home/psotech/connectors/inputFiles		connector.local.input.localDirectory=/home/psotech/connectors/inputFiles Input file location. If input file will be on a local drive, specify the address for the local drive.
/home/psotech/connectors/archiveFiles		connector.input.archive.directory=/home/psotech/connectors/archiveFiles If input files should be archived after processing, specify an archive directory. Note: This represents a folder on the app server not the remote FTP server.
true		connector.input.file.name.tenant.suffix.enable=true For SaaS customer use only.
		connector.input.file.name.tenant.suffix.override= For SaaS customer use only. Specify tenant suffix for input files.
Output File Settings - Connector reports may be sent to an FTP server, to specified email addresses, or both.		
false		connector.ftp.output.report.enable=false
/home/connector/Output		connector.ftp.output.report.remoteDirectory=/home/connector/Output
true		connector.report.email.enable=true
		connector.report.email.toAddresses=
		connector.report.email.CCAddresses=

CONNECTORS		
Default Value	**Chosen Value**	**Description**
=$interfaceId$ - Connector Results		connector.report.email.mailSubject=$interfaceId$ - Connector Results
true		connector.report.email.enableDetailReportAttachments=true
Exception,Warning,FATAL		connector.report.detail.displayMessageTypes=Exception,Warning,FATAL Specify details to be included in report output. Possible values for connector.report.detail.displayMessageTypes: Exception, Warning, FATAL, Info.
FTP connection settings - Complete this section if either input or output files will be provided via FTP.		
sftp		connector.ftp.protocol=sftp Possible values: ftp, sftp. SaaS customers must use sftp.
fileupload.plateau.com		connector.ftp.server=fileupload.plateau.com
22		connector.ftp.port=22
		connector.ftp.userID=
		connector.ftp.password=
Organization Connector		
PUBLIC		organization.connector.defaultValue.domainID=PUBLIC
PUBLIC		organization.connector.defaultValue.finAcctDomainID=PUBLIC
		organization.connector.defaultValue.orgTypeID=
User Connector		
PUBLIC		user.connector.defaultValue.domainID=PUBLIC
		user.connector.defaultValue.parentOrgID=
		user.connector.defaultValue.parentDomainID=
PUBLIC		user.connector.defaultValue.orgDomainID=PUBLIC
PUBLIC		user.connector.defaultValue.finAcctDomainID=PUBLIC
DEFAULT USER		user.connector.defaultValue.studentRoleID=DEFAULT USER
LEARNING_USER		user.connector.defaultValue.sfLearningStudentRoleID=LEARNING_USER
Y		user.connector.defaultValue.jpAutoAssignQuals=Y Valid values; N or Y
Y		user.connector.defaultValue.jpAutoRemoveQuals=Y Valid values; N or Y
Y		user.connector.defaultValue.jpAutoAssignPPRF=Y Valid values; N or Y
Y		user.connector.defaultValue.jpAutoRemovePPRF=Y Valid values; N or Y
America/New_York		user.connector.defaultValue.preferenceTimeZone=America/New_York
English		user.connector.defaultValue.preferenceLocale=English
USD		user.connector.defaultValue.preferenceCurrency=USD
N		user.connector.defaultValue.supervisorReRouteItemApprovals=N Valid values; N or Y
N		user.connector.defaultValue.supervisorReRouteScheduleOfferingApprovals=N Valid values; N or Y

CONNECTORS		
Default Value	**Chosen Value**	**Description**
N		user.connector.defaultValue.supervisorReRouteSF182Approvals=N Valid values; N or Y
N		user.connector.defaultValue.supervisorReRoutePerformanceReview=N Valid values; N or Y
N		user.connector.defaultValue.supervisorReRouteAssessmentApprovals=N Valid values; N or Y
N		user.connector.defaultValue.accessToOrgFinAcct=N Valid values; N or Y
User Connector (Federal Customers Only)		
PUBLIC		federaluser.connector.defaultValue.domainID=PUBLIC
		federaluser.connector.defaultValue.parentOrgID=
		federaluser.connector.defaultValue.parentDomainID=
PUBLIC		federaluser.connector.defaultValue.orgDomainID=PUBLIC
PUBLIC		federaluser.connector.defaultValue.finAcctDomainID=PUBLIC
Y		federaluser.connector.defaultValue.jpAutoAssignQuals=Y Valid values; N or Y
Y		federaluser.connector.defaultValue.jpAutoRemoveQuals=Y Valid values; N or Y
Y		federaluser.connector.defaultValue.jpAutoAssignPPRF=Y Valid values; N or Y
Y		federaluser.connector.defaultValue.jpAutoRemovePPRF=Y Valid values; N or Y
America/New_York		federaluser.connector.defaultValue.preferenceTimeZone=America/New_York
English		federaluser.connector.defaultValue.preferenceLocale=English
USD		federaluser.connector.defaultValue.preferenceCurrency=USD
N		federaluser.connector.defaultValue.supervisorReRouteItemApprovals=N Valid values; N or Y
N		federaluser.connector.defaultValue.supervisorReRouteScheduleOfferingApprovals=N Valid values; N or Y
N		federaluser.connector.defaultValue.supervisorReRouteSF182Approvals=N Valid values; N or Y
N		federaluser.connector.defaultValue.supervisorReRoutePerformanceReview=N Valid values; N or Y
N		federaluser.connector.defaultValue.supervisorReRouteAssessmentApprovals=N Valid values; N or Y
N		federaluser.connector.defaultValue.accessToOrgFinAcct=N Valid values; N or Y
Item Connector		
PUBLIC		item.connector.defaultValue.domainID=PUBLIC
America/New_York		item.connector.defaultValue.timezone=America/New_York
Schedule Offering Connector		

CONNECTORS		
Default Value	**Chosen Value**	**Description**
PUBLIC		scheduleoffering.connector.defaultValue.domainID=PUBLIC
America/New_York		scheduleoffering.connector.defaultValue.timezone=America/New_York
Position Connector		
PUBLIC		position.connector.defaultValue.domainID=PUBLIC
1.0		position.connector.defaultValue.fteFactor=1.0
no		position.connector.defaultValue.jobSharingEnabled=no
SF BizX User Connector - When SF Learning is used with other SF BizX modules (integrated) and user data to SF Learning is coming from SF core then the SF BizX User connector is used. This SF user connector usage is turned on by setting SUCCESSFACTORS_LEARNING.successFactorsLearningEnabled=true or making the below user.connector.successfactors.learning.forceEnable=true. In a scenario where SF Learning is used with other SF BizX modules (SUCCESSFACTORS_LEARNING.successFactorsLearningEnabled=true) but user data is coming from customer's HR system directly (not using SF BizX user connector) then SF BizX user connector can be disabled by specifying user.connector.successfactors.learning.disable=true.		
true		user.connector.successfactors.learning.disable=true
false		user.connector.successfactors.learning.forceEnable=false

17.4.1 DIRECT_LINK

This file will manage the Direct Link Configuration. The Direct Link functionality allows an administrator to create a URL to use in emails, media, etc that allows Users to click on the link and go straight to the page within the LMS (if SSO is enabled) or after logging in. There is no need to enter the host name, context, or protocol values as the system will determine those settings automatically.

- Learning Plan
- Home Page
- Catalog Simple Search
- Learning History
- Current Registration
- External Requests
- Employee Subordinates
- Item Details
- Scheduled Offering Details
- Registration
- Online Content
- Reports
-
- Reports With Criteria
- Performance Review
- Competency Assessment
- My Plan
- Curricula
- Questionnaire Surveys
- Pending Reviews and Approvals – Performance Management
- Pending Reviews and Approvals – Training
- Talent Profile

Any removals or additions to direct links would be created in this file.

17.4.2 ENTITY_IMPORT

This configuration contains the entity import settings. It provides a list of the attachment (file) types that will considered as a valid attachment for importing user data.

System Admin > Configuration > System Configuration > ENTITY_IMPORT

ENTITY_IMPORT		
Default Value	**Chosen Value**	**Description**

ENTITY_IMPORT		
Default Value	**Chosen Value**	**Description**
[xls]=true [xlsx]=true		supportedAttachmentTypes= Allowable file formats for import
600		maximumSizePerAttachmentKB= The maximum size of a single attachment in KB. 1KB=1024 bytes. A value of "0" indicates that there is no limit.
-1		backgroundJobThreshold= Total rows allowed for online import job. If rows more than this setting, the import will be executed as background job

17.4.3 LEARNER_SECURITY

User Roles grant access to menus in the User application. This configuration contains the workflows and restrictions settings for users. The section of the file with the heading of "…*restricted user-side…"* contains all user workflows (menus) that are inaccessible to Supervisors when viewing a Subordinate record, regardless of the User Role assigned. E.g., If a Supervisor's User Role specifies access to 'Browse Catalog,' and the Browse Catalog workflow is listed here, Supervisors may browse their own catalog, but not those of their subordinates when in subordinate view mode

Workflows may be removed from this file if necessary, but it is recommended that XML comments be used instead of deleting the references. Workflows may also be added. Adding workflows to this file requires duplicating the syntax of the other workflows in the file. Find the User workflow in System Admin > Security > Role Management, copy and paste the workflow name into this file. It is recommended to use XML comments to document the addition.

System Admin > Configuration > System Configuration > LEARNER_SECURITY

LEARNER_SECURITY	
Mapping user-side URLs to the Workflows in which the URLs are used. Enter any changes to the existing file.	
# Mapping user-side URLs to the Workflows those URLs are used in. Add default value and change value below.	
Default Value	**Changed Value**
See configuration file in application.	
# A list of restricted user-side URLs	
Default Value	**Changed Value**
userRestrictionWorkflows.AccessSubordinateCompetencyAssessmentProcesses=STUDENT Access Subordinate Competency Assessment Processes	
userRestrictionWorkflows.AccessLearningPlans=STUDENT Access Learning Plans	
userRestrictionWorkflows.AccessSubordinatePerformanceReviews=STUDENT Access Subordinate Performance Reviews	
userRestrictionWorkflows.AccessSubordinates=STUDENT Access Subordinates	
userRestrictionWorkflows.AccessSubordinateDeadlineDashboard=STUDENT Access Subordinate Deadline Dashboard	
userRestrictionWorkflows.AccessSubordinateGoalStatusDashboard=STUDENT Access Subordinate Goal Status Dashboard	
userRestrictionWorkflows.AccessSubordinatePerformanceReviewStatusDashboard=STUDENT Access Subordinate Performance Review Status Dashboard	
userRestrictionWorkflows.AccessEmployeeMatrix=STUDENT Access Employee Matrix	
userRestrictionWorkflows.AccessDevelopmentPlans=STUDENT Access Development Plans	
# A list of restricted user-side URLs when assuming the identity of another user	
Default Value	**Changed Value**
userAssumptionRestrictionWorkflows.AccessCompetencyAssessmentProcesses=STUDENT Access Competency Assessment Processes	
userAssumptionRestrictionWorkflows.AccessPerformanceReviews=STUDENT Access Performance Reviews	
userAssumptionRestrictionWorkflows.AccessAdvancedCatalogSearch=STUDENT Access Advanced Catalog Search	
userAssumptionRestrictionWorkflows.AccessBrowseCatalog=STUDENT Access Browse Catalog	
userAssumptionRestrictionWorkflows.AccessCalendarofOfferings=STUDENT Access Calendar of Offerings	
userAssumptionRestrictionWorkflows.AccessSimpleCatalogSearch=STUDENT Access Simple Catalog Search	

LEARNER_SECURITY	
Mapping user-side URLs to the Workflows in which the URLs are used. Enter any changes to the existing file.	
userAssumptionRestrictionWorkflows.AccessSubordinateCompetencyAssessmentProcesses=STUDENT Access Subordinate Competency Assessment Processes	
userAssumptionRestrictionWorkflows.AccessDevelopmentPlans=STUDENT Access Development Plans	
userAssumptionRestrictionWorkflows.AccessLearningPlans=STUDENT Access Learning Plans	
userAssumptionRestrictionWorkflows.AccessRegistrations=STUDENT Access Registrations	
userAssumptionRestrictionWorkflows.AccessSubordinatePerformanceReviews=STUDENT Access Subordinate Performance Reviews	
userAssumptionRestrictionWorkflows.AccessSubordinates=STUDENT Access Subordinates	
userAssumptionRestrictionWorkflows.AccessSubordinateDeadlineDashboard=STUDENT Access Subordinate Deadline Dashboard	
userAssumptionRestrictionWorkflows.AccessSubordinateGoalStatusDashboard=STUDENT Access Subordinate Goal Status Dashboard	
userAssumptionRestrictionWorkflows.AccessSubordinatePerformanceReviewStatusDashboard=STUDENT Access Subordinate Performance Review Status Dashboard	
userAssumptionRestrictionWorkflows.AccessEmployeeMatrix=STUDENT Access Employee Matrix	
userAssumptionRestrictionWorkflows.AccessCompensationManagement=STUDENT Access Compensation Management	
userAssumptionRestrictionWorkflows.AccessApprovals=STUDENT Access Approvals	
userAssumptionRestrictionWorkflows.AccessMyCommunities=STUDENT Access My Communities	
userAssumptionRestrictionWorkflows.AccessOrderStatus=STUDENT Access Order Status	
userAssumptionRestrictionWorkflows.AccessOrderTickets=STUDENT Access Order Tickets	
userAssumptionRestrictionWorkflows.AccessShoppingCart=STUDENT Access Shopping Cart	
userAssumptionRestrictionWorkflows.AccessSkills=STUDENT Access Skills	

17.4.4 LMS_ADMIN

The LMS_ADMIN file contains general environmental settings, including some security, locations of other servers and paths in the environment, and process information. This file is organized into the following basic sections:

- SYSTEM: Contains settings for TMS Globally (and not a particular module)
- I18N BEHAVIOR: Contains settings for the internationalization system of Talent Management
- HELP SYSTEM: Contains settings for the help system of Talent Management
- LEARNING CONTENT: Contains settings for the delivery of learning content to users
- BACKGROUND JOB: Contains settings for background job processing
- ALL USERS/APPLICATION INTERACTION SETTINGS: Contains settings to control how all users (both admin and end) interact with the application
- END USERS/APPLICATION INTERACTION SETTINGS: Contains settings to control how end users interact with the application
- ADMIN/APPLICATION INTERACTION SETTINGS: Contains settings to control how administrators interact with the application

System Admin > Configuration > System Configuration > LMS_ADMIN

LMS_ADMIN: Encryption		
SuccessFactors Talent Management can have only one encryption handler, described in the <Encryption> element. When you install the application, SuccessFactors includes three encryption handlers and the configuration to point to them. Two are commented out, and the recommended Sun JCE handler (option 3) is uncommented.		
Encryption 1		1 – supports UTF-8 characters but is not compatible with legacy Admin/student passwords.
Encryption 2		2 – supports UTF-8 characters but is not compatible with legacy Admin/student passwords. DES algorithm
Encryption 3 (Default Value)		3 – supports UTF-8 characters and is compatible with legacy Admin/student passwords. Triple-DES algorithm

LMS_ADMIN: Database Preferences

Modify this configuration before implementation. **Do <u>not</u> change these settings after Administrators add data to the database**. These settings specify date/time translation between the database and application server. This element resolves problems when the database and application server are in different locales.

- The settings below <u>must match</u> the database OS settings.
- This is default time zone for Administrator and User records.
- This is the current time zone for instances in notifications.

Default Value	Chosen Value	Description
MM/dd/yyyy		Date Pattern
hh:mm:ss aaa		Time Pattern
mm/dd/yyyy		DB Date Pattern
hh:mi:ss AM		DB Time Pattern
En		ISO Language Code
US		ISO Country Code
9999		Max Supported Year

LMS_ADMIN: Help Files		
Default Value	**Chosen Value**	**Description**
"/help"		baseHelpRedirectURL=/help To point to the location where the help.war file is deployed. By default this is a WAR file inside of the plateau.ear, so the context path is simply /help. If deployed outside the EAR, you should give a complete URL.
"/getHelpRedirector.do"		helpRedirectorURI=/getHelpRedirector.do Change the helpRedirectorURI only if you change the struts action or want to go thru a custom redirector

LMS_ADMIN: Learning Content Settings: Content		
Default Value	**Chosen Value**	**Description**
Window options when launching different course types. Create a new row for each course type to be changed. The settings below are the same for aicc, scorm, browser, and document, but can be changed individually for each one.		
width=800 height=600 top=0 left=0 toolbar=0 location=0 directories=0 status=1 menubar=0 scrollbars=1 resizable=1		contentWindowOpenOptions.aicc contentWindowOpenOptions.scorm contentWindowOpenOptions.browser contentWindowOpenOptions.document
120 (seconds)		contentStructurePageExpireDuration=120 The Online Content Structure page expires after being idle for this amount of time (in seconds). The expired page transitions to a page that supports content communication (AICC and SCORM). When the user returns to the Online Content Structure page it is updated with content statuses.
0		contentStructurePageKeepAliveInterval=0 The Online Content Structure page has a keep alive feature that is based on this amount of time (in seconds). 0 - Session timeout-600 (i.e. 10 minutes) Minimum : 120 (i.e. 2 minutes)

LMS_ADMIN: Virtual Learning System Settings – Separate License Required		
The Vle element enables connection between SuccessFactors and Virtual Learning Servers (VLS) such as WebEx, Live Meeting, Adobe Connect Pro, Centra. When you set attribute enabled to true, you must also configure the VLS.		
Default Value	**Chosen Value**	**Description**
false		vleEnabled=falseSetting Vle to true shows the VLS tabs in the administration environment. This functionality is only available if licensed and will require further configuration. See VLS Configuration Guide.

LMS_ADMIN: Online Support		
It is recommended to leave all the default Online Support settings unless otherwise specified during Content Enabling Workshops.		
Default Value	**Chosen Value**	**Description**
Comment only		aiccSecurityEnabled=false Uncomment AICC Security to enforce security on AICC content. This will prevent users from copying URLs that will allow them to take over other user's AICC sessions.
False		contentTestPagesEnabled=false Keep this to false in production. May be useful in a staging environment to change to true in order to track issues.
False		userIdentityInformationCookieEnabled=false Enabling this setting would store the current User ID, name in the cookie. This information may be required for certain third party content to work properly and may be useful if this is necessary.
False		cookieCrossDomainSupportEnabled=false Cookie Cross-Domain Support enables launching and tracking API dependent courseware, such as SCORM or SuccessFactors Tracking, with a different domain name than SuccessFactors Learning (e.g., a content server). The LMS and the content server must share the top-level domain.
<Customer Name>.com		cookieCrossDomainSupportDomainName=plateausystems.com The Domain Name is the top-level domain. SuccessFactors Learning with the domain learning.plateausystems.com and a content server with the domain content.plateausystems.com share the top-level domain plateausystems.com. Enabling this setting loads SuccessFactors Learning communication APIs under the configured domain name. In addition, the actual courseware must include JavaScript to truncate its Domain Name to the top-level domain.

LMS_ADMIN: Online Support		
False		communicationCrossDomainSupportEnabled=false Cookie Cross-Domain Support enables launching and tracking API dependent courseware, such as SCORM or SuccessFactors Tracking, with a different domain name than SuccessFactors Learning (e.g., a content server). This solution deploys SuccessFactors Learning courseware communication APIs on the content server and utilizes a communication proxy running on the content server. The communication proxy relays courseware data to SuccessFactors Learning. Unlike the Cookie Cross-Domain solution, the content server and the SuccessFactors Learning server need not share a common top-level domain. Use this setting in conjunction with the Cross-Domain tab of Content Object and question records.
Out-of-box		defaultContentServerPath=http://contentserver:7000/content This path is the default value for the folder containing the LMS files deployed to the content server. Administrators can override this value in the Cross-Domain tab of a Content Object or question record. (Sample) http://cms.com:80/content Absolute URL can be specified, or else a URI path that is relative to the LMS base URL (must start with a slash).
http://cms.com:80/content main_content_wrapper.html		contentWrapperPageName=main_content_wrapper.html The Content Wrapper Page is the name of the wrapper frameset that loads SuccessFactors Learning courseware APIs and the training content.
scorm_2004_content_wrapper.html		scorm2004ContentWrapperPageName=scorm_2004_content_wrapper.html The SCORM 2004 Content Wrapper is the name of the SCORM 2004 wrapper frameset that loads SCORM 2004 courseware APIs and the training content.
main_question_wrapper.html		externalURLQuestionWrapperPageName=main_question_wrapper.html The External URL Question Wrapper Page is the name of the wrapper frameset that loads the Exam APIs and an external question configured to work with a SuccessFactors Exam.
main_content_opener.html		contentOpenerPageName=main_content_opener.html The Content Opener Page is the name of the page that loads the SuccessFactors Learning courseware APIs. Unlike the wrapper page, the opener page opens the actual training content in a new window.

LMS_ADMIN: Online Support		
http://cms:8080/proxlet		defaultProxletPath=http://contentserver:7000/proxlet lmsSessionId=JSESSIONIDThe Default Proxlet Path is the default value for the communication proxy loaded on the content server. This path does not include the Servlet Alias. Absolute URL can be specified, or else a URI path that is relative to the LMS base URL (must start with a slash). Administrators can override this value in the Cross-Domain tab of a Content Object or question record.
False		Netg NETg support enables offline NETg data to upload to the SuccessFactors Learning server when the User logs into the application. If set to “true”, SuccessFactors Learning displays a popup window to the User asking user to accept downloaded Netg content.

LMS_ADMIN: Background Job Scheduling		
Default Value	**Chosen Value**	**Description**
5		onlineOperationMaxRecordsCount=5 This is the maximum number of affected records that an Administrator can perform a batch procedure (e.g., User Needs Management). For example, if set to 5, an Administrator cannot use User Needs Management to assign an Item to more than 5 User record at one time. If the number of records exceeds this count, the Administrator must schedule the procedure to run as a background job. This number varies depending on the hardware running SuccessFactors and the network environment.
All Times available		Background jobs are asynchronous jobs that an administrator can set up and pass to the Scheduler. Background jobs can be scheduled only during allowable time frames described the settings shown below. Each Timeframe element defines a window: a date and time during which administrators can run a background job. By default, each day is contained in brackets. '...[Monday].enabled' means that background jobs will run on Mondays. However, the bracketed text is just a string to denote one window. You could also for example create a [Weekdays] and [Weekends] window. The default below shows one example of a non-day bracketed value, [Christmas]. For each bracketed day, you can define start and end minutes, hours, dates, months, etc. A * means any of the unit so if you have a * in minutes and start/end hours between 0 and 5, then jobs can start on any minute between the hours of Midnight and 5 AM. Note that hours are in 24-hour format so that 0 is Midnight and 13 is 1 PM For procedures which require more processor time and resources to create settings that restrict timeframe from 12:00am through 5:00am, Monday through Friday
Use the spaces below to record the available time frames for background jobs: • Create as many time frames as needed • Use an * to indicate “all” • All “end” values must be greater than “start” values • End hours include the specified hour. For example, 0 – 5 = 12:00 AM – 5:59:59 AM. Time frames are relative to the DB time zone. SuccessFactors does not display the allowed time frames in the Administrator specified time zone. • Days of week are identified as sun, mon, tue, wed, thu, fri, sat • Day and Month are identified in two-digits. For example January is 01, December is 12		

LMS_ADMIN: Background Job Scheduling

Example:

Start	Minute **1**	Hour **20**	Day *	Month *****	Year *****	Day of Week **Thu**
⇩	⇩	⇩	⇩	⇩	⇩	⇩
End	Minute **30**	Hour **24**	Day *****	Month *****	Year *****	Day of Week **Sat**
Explanation	Between minutes 1 and 30 of each hour listed in the hour column.	Between 8:00 pm and midnight on the days in the interval listed in the days.	On every day	Of Every month	In every year.	On Thursday, Friday, and Saturday.

allowableBackgroundJobTimeframes[Monday].enabled=true
lowableBackgroundJobTimeframes[Monday].startMinute=*
allowableBackgroundJobTimeframes[Monday].startHour=*
allowableBackgroundJobTimeframes[Monday].startDate=*
allowableBackgroundJobTimeframes[Monday].startMonth=*
allowableBackgroundJobTimeframes[Monday].startYear=*
allowableBackgroundJobTimeframes[Monday].startDayofWeek=mon
allowableBackgroundJobTimeframes[Monday].endMinute=*
allowableBackgroundJobTimeframes[Monday].endHour=*
allowableBackgroundJobTimeframes[Monday].endDate=*
allowableBackgroundJobTimeframes[Monday].endMonth=*
allowableBackgroundJobTimeframes[Monday].endYear=*
allowableBackgroundJobTimeframes[Monday].endDayofWeek=mon
allowableBackgroundJobTimeframes[Tuesday].enabled=true
allowableBackgroundJobTimeframes[Tuesday].startMinute=*
allowableBackgroundJobTimeframes[Tuesday].startHour=*
allowableBackgroundJobTimeframes[Tuesday].startDate=*
allowableBackgroundJobTimeframes[Tuesday].startMonth=*
allowableBackgroundJobTimeframes[Tuesday].startYear=*
allowableBackgroundJobTimeframes[Tuesday].startDayofWeek=tue
allowableBackgroundJobTimeframes[Tuesday].endMinute=*
allowableBackgroundJobTimeframes[Tuesday].endHour=*
allowableBackgroundJobTimeframes[Tuesday].endDate=*
allowableBackgroundJobTimeframes[Tuesday].endMonth=*
allowableBackgroundJobTimeframes[Tuesday].endYear=*
allowableBackgroundJobTimeframes[Tuesday].endDayofWeek=tue
allowableBackgroundJobTimeframes[Wednesday].enabled=true
allowableBackgroundJobTimeframes[Wednesday].startMinute=*
allowableBackgroundJobTimeframes[Wednesday].startHour=*
allowableBackgroundJobTimeframes[Wednesday].startDate=*
allowableBackgroundJobTimeframes[Wednesday].startMonth=*
allowableBackgroundJobTimeframes[Wednesday].startYear=*
allowableBackgroundJobTimeframes[Wednesday].startDayofWeek=wed
allowableBackgroundJobTimeframes[Wednesday].endMinute=*
allowableBackgroundJobTimeframes[Wednesday].endHour=*
allowableBackgroundJobTimeframes[Wednesday].endDate=*
allowableBackgroundJobTimeframes[Wednesday].endMonth=*
allowableBackgroundJobTimeframes[Wednesday].endYear=*
allowableBackgroundJobTimeframes[Wednesday].endDayofWeek=wed

LMS_ADMIN: Background Job Scheduling
allowableBackgroundJobTimeframes[Thursday].enabled=true allowableBackgroundJobTimeframes[Thursday].startMinute=* allowableBackgroundJobTimeframes[Thursday].startHour=* allowableBackgroundJobTimeframes[Thursday].startDate=* allowableBackgroundJobTimeframes[Thursday].startMonth=* allowableBackgroundJobTimeframes[Thursday].startYear=* allowableBackgroundJobTimeframes[Thursday].startDayofWeek=thu allowableBackgroundJobTimeframes[Thursday].endMinute=* allowableBackgroundJobTimeframes[Thursday].endHour=* allowableBackgroundJobTimeframes[Thursday].endDate=* allowableBackgroundJobTimeframes[Thursday].endMonth=* allowableBackgroundJobTimeframes[Thursday].endYear=* allowableBackgroundJobTimeframes[Thursday].endDayofWeek=thu allowableBackgroundJobTimeframes[Friday].enabled=true allowableBackgroundJobTimeframes[Friday].startMinute=* allowableBackgroundJobTimeframes[Friday].startHour=* allowableBackgroundJobTimeframes[Friday].startDate=* allowableBackgroundJobTimeframes[Friday].startMonth=* allowableBackgroundJobTimeframes[Friday].startYear=* allowableBackgroundJobTimeframes[Friday].startDayofWeek=fri allowableBackgroundJobTimeframes[Friday].endMinute=* allowableBackgroundJobTimeframes[Friday].endHour=* allowableBackgroundJobTimeframes[Friday].endDate=* allowableBackgroundJobTimeframes[Friday].endMonth=* allowableBackgroundJobTimeframes[Friday].endYear=* allowableBackgroundJobTimeframes[Friday].endDayofWeek=fri allowableBackgroundJobTimeframes[Saturday].enabled=true allowableBackgroundJobTimeframes[Saturday].startMinute=* allowableBackgroundJobTimeframes[Saturday].startHour=* allowableBackgroundJobTimeframes[Saturday].startDate=* allowableBackgroundJobTimeframes[Saturday].startMonth=* allowableBackgroundJobTimeframes[Saturday].startYear=* allowableBackgroundJobTimeframes[Saturday].startDayofWeek=sat allowableBackgroundJobTimeframes[Saturday].endMinute=* allowableBackgroundJobTimeframes[Saturday].endHour=* allowableBackgroundJobTimeframes[Saturday].endDate=* allowableBackgroundJobTimeframes[Saturday].endMonth=* allowableBackgroundJobTimeframes[Saturday].endYear=* allowableBackgroundJobTimeframes[Saturday].endDayofWeek=sat allowableBackgroundJobTimeframes[Sunday].enabled=true allowableBackgroundJobTimeframes[Sunday].startMinute=* allowableBackgroundJobTimeframes[Sunday].startHour=* allowableBackgroundJobTimeframes[Sunday].startDate=* allowableBackgroundJobTimeframes[Sunday].startMonth=* allowableBackgroundJobTimeframes[Sunday].startYear=* allowableBackgroundJobTimeframes[Sunday].startDayofWeek=sun allowableBackgroundJobTimeframes[Sunday].endMinute=* allowableBackgroundJobTimeframes[Sunday].endHour=* allowableBackgroundJobTimeframes[Sunday].endDate=* allowableBackgroundJobTimeframes[Sunday].endMonth=* allowableBackgroundJobTimeframes[Sunday].endYear=* allowableBackgroundJobTimeframes[Sunday].endDayofWeek=sun allowableBackgroundJobTimeframes[Christmas]enabled=true allowableBackgroundJobTimeframes[Christmas]startMinute=*

LMS_ADMIN: Background Job Scheduling
allowableBackgroundJobTimeframes[Christmas]startHour=* allowableBackgroundJobTimeframes[Christmas]startDate=25 allowableBackgroundJobTimeframes[Christmas]startMonth=12 allowableBackgroundJobTimeframes[Christmas]startYear=* allowableBackgroundJobTimeframes[Christmas]startDayofWeek=* allowableBackgroundJobTimeframes[Christmas]endMinute=* allowableBackgroundJobTimeframes[Christmas]endHour=* allowableBackgroundJobTimeframes[Christmas]endDate=25 allowableBackgroundJobTimeframes[Christmas]endMonth=12 allowableBackgroundJobTimeframes[Christmas]endYear=* allowableBackgroundJobTimeframes[Christmas]endDayofWeek=*

LMS_ADMIN		
1000		learningEventResynchronizationStudentCommitCount=1000 As the Learning Event Synchronization process runs, SuccessFactors commits, or “saves”, batches of records. If the process fails, only the current non-committed batch of User Synchronization information is lost. Set to “0” to commit all records at process completion. Student Commit Count
10485760 (10Mb)		fileUploadMaxSizeThis setting limits the number of bytes which may be posted back to the application server. This affects the size of files which may be attached to email notifications but also the amount of data sent in typical transactions, such as editing records. It is highly recommended that this is never set below 10485760 bytes.
255		fileUploadFilenameMaxSize This is the maximum amount of characters for a file name to be uploaded to the server
524288		resourceUploadMaxSize=524288 This is the limit, in bytes, of any image file uploaded to the server through PQE. Question authors can change the "size" of an image file, but they are not changing the actual size in the database. Rather, they are constraining the rendering size.
262144		resourceUploadWarningSize=262144 This is the limit, in bytes, of images that are uploaded to PQE without warning. If the image size is over the resourceUploadWarningSize, but below resourceUploadMaxSize, the question author is warned, but not prevented from uploading the file.
True		Chart Framework: Cache Chart Formats If set to true, SuccessFactors caches the chart format after loading it from the database.
True		hideUserPhotosGlobally=true If set to true all employee photos will be hidden EVERYWHERE in the application (admin and end user interfaces).

LMS_ADMIN: Privacy Act		
Default Value	**Chosen Value**	**Description**
*********		privacyActDefaultMask=********* Privacy Act masks enable the student ID and/or the instructor ID to be hidden when a notification is sent or when a report is printed. Admin running the report can change it at report time. Default Mask. This setting configures the appearance of the mask.

LMS_ADMIN: Privacy Act		
Masking in Email Notifications		
True		privacyActMaskEnabled.Notification.StudentID=true
True		privacyActMaskEnabled.Notification.InstructorID=true
Masking in Reports		
True		privacyActMaskEnabled.Report.StudentID=true
True		privacyActMaskEnabled.Report.InstructorID=true

Log Settings and Password Validation		
Default Value	**Chosen Value**	**Description**
false		reportStackTraceToUser=false (default setting) to display a ticket number to user in the browser (recommended for production environments). Set to true to display the stack trace to the user in browser (recommended for development and test environments). Whether set to true or false, errors are always logged through *Log4J* with a ticket number by default in the plateau.log file
True		emailValidationEnabled=true SuccessFactors Learning verifies that the entered email contains a Period '.' and an '@' symbol.

true		restrictAccessToOtherComponentObjectsDuringExam=true Global setting whether to freeze the item's content objects while the exam is in progress. Set to false to allow "open book" tests.

LMS_ADMIN: End User Interaction Behavior: Learning Plan Configuration		
Default Value	**Chosen Value**	**Description**
False		showDaysRemaining=false Set to true to show the Days Remaining Column rather than the Required by column in the Learning Plan Page and the Curriculum Details page. Default: false.
False		showAssignmentType=false Set to true to show the Assignment Type Column in the Learning Plan Page, the Curriculum Details page, and in the Home page. Default: false.
Configuration to define which data/fields are displayed on the Learning Plan, in the expandable area under the Item Name.		
True		showItemKeyField=true
False		showItemRevisionField=false
True		showItemDescriptionField=true
True		showAssignmentTypeField=true
True		showAssignedByField=true
False		showCPEsField=false
False		showCreditHoursField=false
False		showContactField=false
True		showRegistrationDateField=true
True		showStartDateField=true
True		showLocationField=true
The *Learning Plan Fields Chooser Items* controls the columns that users can enable and disable on the learning plan and some properties of the column. The settings have attributes that identify the column, control the user interaction, call the column title, and control the width. The attributes are: visibility - controls if user is forced to show column (mandatory), if column shows by default (default) or if the column can be turned on or off by the user (optional) / titleLabelID - the label (from the I18N settings in the admin environment) that appears at the top of the column / width - the default width of the column.		
TRUE		learningPlanFieldsChooserItems.title.enabled=true
title		learningPlanFieldsChooserItems.title.columnID=title
label.Title		learningPlanFieldsChooserItems.title.titleLabelID=label.Title
mandatory		learningPlanFieldsChooserItems.title.visibility=mandatory
50		learningPlanFieldsChooserItems.title.width=50
TRUE		learningPlanFieldsChooserItems.itemID.enabled=true
itemID		learningPlanFieldsChooserItems.itemID.columnID=itemID
label.ID		learningPlanFieldsChooserItems.itemID.titleLabelID=label.ID
optional		learningPlanFieldsChooserItems.itemID.visibility=optional
4		learningPlanFieldsChooserItems.itemID.width=4
TRUE		learningPlanFieldsChooserItems.itemType.enabled=true
itemType		learningPlanFieldsChooserItems.itemType.columnID=itemType
label.Type		learningPlanFieldsChooserItems.itemType.titleLabelID=label.Type
default		learningPlanFieldsChooserItems.itemType.visibility=default
4		learningPlanFieldsChooserItems.itemType.width=4

LMS_ADMIN: End User Interaction Behavior: Learning Plan Configuration		
TRUE		learningPlanFieldsChooserItems.requiredBy.enabled=true
requiredBy		learningPlanFieldsChooserItems.requiredBy.columnID=requiredBy
label.RequiredBy		learningPlanFieldsChooserItems.requiredBy.titleLabelID=label.RequiredBy
default		learningPlanFieldsChooserItems.requiredBy.visibility=default
4		learningPlanFieldsChooserItems.requiredBy.width=4
TRUE		learningPlanFieldsChooserItems.status.enabled=true
status		learningPlanFieldsChooserItems.status.columnID=status
label.Status		learningPlanFieldsChooserItems.status.titleLabelID=label.Status
default		learningPlanFieldsChooserItems.status.visibility=default
8		learningPlanFieldsChooserItems.status.width=8
TRUE		learningPlanFieldsChooserItems.daysRemaining.enabled=true
daysRemaining		learningPlanFieldsChooserItems.daysRemaining.columnID=daysRemaining
label.DaysRemaining		learningPlanFieldsChooserItems.daysRemaining.titleLabelID=label.DaysRemaining
optional		learningPlanFieldsChooserItems.daysRemaining.visibility=optional
4		learningPlanFieldsChooserItems.daysRemaining.width=4
TRUE		learningPlanFieldsChooserItems.assignmentType.enabled=true
assignmentType		learningPlanFieldsChooserItems.assignmentType.columnID=assignmentType
label.AssignmentType		learningPlanFieldsChooserItems.assignmentType.titleLabelID=label.AssignmentType
optional		learningPlanFieldsChooserItems.assignmentType.visibility=optional
8		learningPlanFieldsChooserItems.assignmentType.width=8

Default Value	Chosen Value	Description
None		learningPlanSystemPreferences.groupPlanFilter=None The system default user learning plan settings. User can override with their own preferences. Defaults the Group By drop-down. Possible values: None, ItemType, AssignmentType,DueWithin, StatusTowardCompletion.
All		learningPlanSystemPreferences.itemsFilter=All Defaults the Filter By drop-down. Possible values: All, With Online Content, Registered, In progress
All		learningPlanSystemPreferences.requiredByFilter=All Defaults the Required By drop-down. Possible values: All, Next 30 Days, Next 60 Days, Next 90 Days.

LMS_ADMIN: End User Interaction Behavior: Home Page Settings
Home Page Configuration to indicate which modules are displayed on the home page for users

LMS_ADMIN: End User Interaction Behavior: Home Page Settings		
Default Value	**Chosen Value**	**Description**
True		showHomeCatalogModule=true
True		showHomeAlertsModule=true
True		showHomeLearningPlanModule=true
True		showHomeCareerPlanModule=true
True		showHomeCurriculumModule=true
True		showHomeNewItemModule=true
True		showHomeFeaturedItemModule=true
True		showHomeRevisedItemModule=true
5		homeLearningPlanModuleRecordsToDisplay=5
5		homeCareerPlanModuleRecordsToDisplay=5
5		homeCurriculumModuleRecordsToDisplay=5
25		homeFlaggedCatalogItemsToDisplay=25

LMS_ADMIN: End User Interaction Behavior: Catalog Settings		
Default Value	**Chosen Value**	**Description**
True		showItemRatingInCatalog=true When set to true, the item rating appears in the user catalog. Max item rating is controlled in the maxItemRatingValue element.
100		displayMaxItemDescriptionLength=100 The maximum length (in characters) of a learning item description that displays in the catalog.

LMS_ADMIN: Calendar		
Default Value	**Chosen Value**	**Description**
True		Calendar Lazy Persistence This setting specifies if the persistence is lazy (does not have to happen immediately). SuccessFactors recommends setting this to “true” for best performance. The User’s sort preferences are “remembered” by SuccessFactors Learning. It does not save these preferences immediately. If preferences do not save, change this setting to “false” (this may occur in a clustered environment).
Out-of-box		UI Preference Handler This setting specifies the handler class that “persists” the UI state preferences related to Calendar.
Learning/Catalog Calendar Preference Defaults These settings are defaults that Users can change.		
Default Value	**Chosen Value**	**Description**

LMS_ADMIN: Calendar		
Saturday Sunday		excludedWeekDays.Sunday=true excludedWeekDays.Saturday=true(Choose the days to exclude from the Calendar)
Monday		firstDayOfWeek=Monday (Choose one)
0700 1900 60		calendarDailyTimeSlotStartTime=0700 calendarDailyTimeSlotEndTime=1900 calendarDailyTimeSlotSize=60 Time Display for Daily Events (in 24 hour time) Start Time End Time Slot Minutes
False		rememberCalendarMode=falseSuccessFactors remembers the User's last Calendar view (day, week, or month).
2		monthlyLearningCalendarDailyEventDisplayLimit=2 This setting is the maximum number of events to display in a single day cell within the Month View of the Learning Calendar.
3		monthlyCatalogCalendarDailyEventDisplayLimit=3This setting is the maximum number of events to display in a single day cell within the Month View of the Catalog Calendar.

LMS_ADMIN: Employee Subordinates		
Default Value	**Chosen Value**	**Description**
True		studentSubordinatesLazyPersistence=trueThis setting specifies if the persistence is lazy (does not have to happen immediately). SuccessFactors recommends setting this to "true" for best performance. The User's sort preferences are "remembered" by SuccessFactors Learning. It does not save these preferences immediately. If preferences do not save, change this setting to "false" (this may occur in a clustered environment).
Out-of-box		UI Preference Handler This setting specifies the handler class that "persists" the UI state preferences related to Calendar.
True		studentSubordinatesShowPictures=true This setting shows/hides employee subordinate pictures (if applicable) on the subordinate dashboard and succession planner. Setting to true makes 'show pictures' the default for supervisors and organization owners. If HideUserPhotosGlobally is set to True this setting is irrelevant.
True		studentSubordinatesShowStatus=true This setting shows/hides employee subordinate status by default on the subordinate dashboard and succession planner.

LMS_ADMIN: Employee Subordinates		
True		studentSubordinatesShowSuccessors=trueThis setting shows/hides successors by default. (Requires Succession Planner license).

LMS_ADMIN: End User Interaction Behavior: Miscellaneous		
Default Value	**Chosen Value**	**Description**
tab.InstructionalText		managerDashboardInstructionalText=tab.InstructionalText Controls the instructional text that appears on the Dashboard page (supervisor).
True		showCompetencyType=true This setting determines if the competency type is displayed to the user when competencies are displayed.

LMS_ADMIN: Talent Pool Max Group Size		
Default Value	**Chosen Value**	**Description**
1000		talentPoolMaxGroupSize=1000 Used only if Succession Planning is licensed. Contained in system xml even if the module is not licensed.

LMS_ADMIN: Search New Posts To Communities In The Last Days (new in 6.1)		
Default Value	**Chosen Value**	**Description**
14		searchNewPostsToCommunitiesInTheLastDays=14 Indicates the number of days from the current date to search for a new post in the communities to which the user has access. This setting is used on the user's home page in the Communities button. Valid values are zero and any value greater than zero.

LMS_ADMIN: To Do List Display Revision Information		
Default Value	**Chosen Value**	**Description**
False		displayRevisionInformationInToDoList=false This setting would turn on or off the display of revision date time and number for items on the User's To-Do List.

LMS_ADMIN: Controls News Page Upon Login		
Default Value	**Chosen Value**	**Description**

LMS_ADMIN: Controls News Page Upon Login		
UserDiscretion		displayNewsPageOnLogin=UserDiscretion This configuration controls the display of the user interface News page upon login. Valid values are below: **Never**: News page would not display on login. The user would still have the ability to get to news page from the Easy Link menu. **Always**: News page would always display on user login. The User cannot dismiss this – the page would appear every time they logged in. **UserDiscretion**: News page would display upon login and the user would have the ability (via check box) to not display it each time. This is the default value.

LMS_ADMIN: Configuration Specific to Administrator		
Default Value	**Chosen Value**	**Description**
Advanced		userUIDefaultTabDisplayMode=advancedSet to “simple” to default the records to show “simple” mode (i.e., SuccessFactors displays a single row of the most commonly used tabs). Administrators can change their setting upon login.
True		userUILazyPersistence=trueThis setting specifies if the persistence is lazy (does not have to happen immediately). SuccessFactors recommends setting this to “true” for best performance. The Administrator’s sort preferences are “remembered” by SuccessFactors Learning. It does not save these preferences immediately. If preferences do not save, change this setting to “false” (this may occur in a clustered environment).
True		learningPlanDisplayInLearnerTimezone=trueSet value to “true” to display the User’s *Required* and *Expiration* date in the User’s preferred time zone within the Administrator application.

LMS_ADMIN: Admin Application UI Behavior Configuration: Sticky Preferences		
Default Value	**Chosen Value**	**Description**
Advanced		userUIDefaultTabDisplayMode=advanced Set default tab display mode to "simple" or "advanced". Simple mode displays core tabs. Advanced mode displays all tabs. Default: advanced.
True		userUILazyPersistence=true Specify if the persistence can be lazy (does not have to happen immediately).
True		learningPlanDisplayInLearnerTimezone=true Defaults the administrator's view of users' learning plans. Administrator can set own preference. If the option is true then, by default, dates are displayed in the User's preferred time zone. If false, it is displayed in the Admin's preferred time zone.

LMS_ADMIN: Admin Application UI Behavior Configuration: Limits		
Default Value	**Chosen Value**	**Description**

LMS_ADMIN: Admin Application UI Behavior Configuration: Limits		
5.0		maxItemRatingValue=5.0 The maximum number of rating stars that SuccessFactors Learning displays in the Catalog(s) for an Item.
50		scheduleCopiesLimit=50Limits the amount of copies that the Copy Scheduled Offering Wizard can make in the Admin Environment Setting a reasonable limit prevents admins from mistakenly overwhelming database.
true		restrictUserSelfModification=true Admin Application UI Behavior Configuration: Security/Self Modification *** When restrictUserSelfModification is set to "true" administrators cannot change their own records. For example, when set to true, an administrator "jdoe" with permissions to change administrator accounts can change all other administrator password and permissions *except* for his own. Default value is true. We recommend true. Possible values are true or false. You might set to false in development or training environments, for convenience.
True		displayModuleTabsInAlphabeticalOrder=true This flag is used to order module tabs alphabetically. By default, it is true and module tabs will be displayed in alphabetical order except for the Summary tab. Setting it to false will result in module tabs being ordered as they historically have been before this configuration was introduced.

LMS_ADMIN: WEB SERVICES		
Default Value	**Chosen Value**	**Description**
False		<webServices enabled="false" /> Set the enabled attribute to true if you want the Web Services to be accessible

17.4.5 FINANCIAL

These are general global commerce related settings.

System Admin > Configuration > System Configuration > FINANCIAL

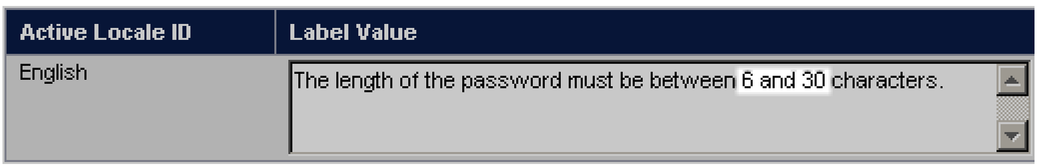
FINANCIAL: General Financial Settings		
Default Value	**Chosen Value**	**Description**
Gray Cell Indicates Default Setting is Strongly Recommended.		
True		Payment Method – Chargeback Option for tracking chargeback payments by external users.
False		Payment Method – Credit Card Option for tracking credit card payments by external users. Requires credit card integration – additional LOE.

FINANCIAL: General Financial Settings		
True	True	Auto Order Approval This value must remain “true.” SuccessFactors does not support the “false” setting.
True		Auto Create Master Inventory If “false”, Administrators must manually add Items to the Master Inventory. Note: Administrator cannot add Items to Catalogs that are not in the Master Inventory.
True		Financial Transaction Approval Required If set to “true” the financial transactions are approved by an Administrator before SuccessFactors allows extraction of the transactions.
SKU-		SKU Prefix
ORDNO-		Order Number Prefix
ORDTKTNO-		Order Ticket Number Prefix
SHPNGACCTID-		Shopping Account Prefix
Internal		Default Shopping Account Types User (Student)
Internal		Default Shopping Account Types Organization

FINANCIAL: External Student		
Default Value	**Chosen Value**	**Description**
True		Payment Methods: Chargeback
False		Credit Card
False		Credit Card Online Authorization This setting enables credit card payments in the SuccessFactors User application.
Out-of-box		Handler Class This setting specifies the class that handles credit card authorization.
Out-of-box		Refund Transaction
Out-of-box		Chargeback Refund TX Handler Class This setting specifies the class that handles chargeback refunds.
Out-of-box		Credit Card Refund TX Handler Class This setting specifies the class that handles credit card refunds.

17.4.6 PASSWORD_POLICY

Note: When password policies are enabled, 'rule hint' labels are displayed to users when resetting or establishing initial passwords. The rule hint labels by default correspond to the default password policy setting, therefore the corresponding rule hint label must be modified if the password policy deviates from the default. E.g., if Password Length Rule is enabled and min/max is set to 6/30, the corresponding rule hint label (instruction.passwordvalidation.PasswordLengthRuleHint) value should be modified to read appropriately. Each active locale ID (Language Packs – if applicable) should be modified to display properly to users:



Active Locale ID	Label Value
English	The length of the password must be between 6 and 30 characters.

System Admin > Configuration > System Configuration > PASSWORD_POLICY

PASSWORD_POLICY: Password Length Rule: This setting determines the required length of the password.		
Description	**Value Options**	**Chosen Value**
Enabled	TRUE, FALSE	
Rule Type	ALL – Always applicable CREATE - applicable only when an User account is being created CHANGE - applicable only when password is changed CREATE_AND_CHANGE - applicable when password is created or changed.	
User Type	LEARNER, ADMINISTRATOR, ALL	
Minimum Password Length	*1*	
Maximum Password Length	*40*	

PASSWORD_POLICY: Required Characters Rule: This setting determines the characters required to be within a password.		
Description	**Value Options**	**Chosen Value**
Enabled	TRUE, FALSE	
Rule Type	ALL – Always applicable CREATE - applicable only when an User account is being created CHANGE - applicable only when password is changed CREATE_AND_CHANGE - applicable when password is created or changed.	

PASSWORD_POLICY: Required Characters Rule: This setting determines the characters required to be within a password.		
User Type	LEARNER, ADMINISTRATOR, ALL	
Required Characters	EnglishUpperCaseLetters ("A" - Z") EnglishLowerCaseLetters" ("a" – "z") ArabicNumerals ("0"-"9") NonAlphaNumericCharacters (!@#$%^&*()- _+={}[]<>?/'";:|)	

PASSWORD_POLICY: Successive Character Repetition Rule: The number of times a character can be repeated successively.		
Description	**Value Options**	**Chosen Value**
Enabled	TRUE, FALSE	
Rule Type	ALL – Always applicable CREATE - applicable only when an User account is being created CHANGE - applicable only when password is changed CREATE_AND_CHANGE - applicable when password is created or changed.	
User Type	LEARNER, ADMINISTRATOR, ALL	
Max Repetition Count	2	

PASSWORD_POLICY: Un-Broken Login ID Rule: Password cannot contain the User's login id. Check can be case sensitive or case insensitive.		
Description	**Value Options**	**Chosen Value**
Enabled	TRUE, FALSE	
Rule Type	ALL – Always applicable CREATE - applicable only when an User account is being created CHANGE - applicable only when password is changed CREATE_AND_CHANGE - applicable when password is created or changed.	
User Type	LEARNER, ADMINISTRATOR, ALL	
Case Sensitive	TRUE, FALSE	

PASSWORD_POLICY: First and Last Name Rule: Password cannot contain User's first name or last name or both together.		
Description	**Value Options**	**Chosen Value**
Enabled	TRUE, FALSE	

PASSWORD_POLICY: First and Last Name Rule: Password cannot contain User's first name or last name or both together.		
Rule Type	ALL – Always applicable CREATE - applicable only when an User account is being created CHANGE - applicable only when password is changed CREATE_AND_CHANGE - applicable when password is created or changed.	
User Type	LEARNER, ADMINISTRATOR, ALL	
Check Type	The valid values for are: 1. FIRSTNAME_ONLY - implies the password cannot contain Users first name. It can contain Users lastname. 2. LASTNAME_ONLY - implies the password cannot contain Users lastname. It can contain Users firstname. 3. FIRSTNAME_OR_LASTNAME - implies the password cannot contain Users firstname or lastname 4. FIRST_NAME_AND_LAST_NAME- implies the password cannot contain Users firstname and lastname together. But it can contain either the firstname or the lastname but not both.	
Case Sensitive	TRUE, FALSE	

PASSWORD_POLICY: Previous Passwords Rule: Password cannot be same as specified number of previous passwords. This check can be case sensitive or case insensitive.		
Description	**Value Options**	**Chosen Value**
Enabled	TRUE, FALSE	
Rule Type	ALL – Always applicable CREATE - applicable only when an User account is being created CHANGE - applicable only when password is changed CREATE_AND_CHANGE - applicable when password is created or changed.	
User Type	LEARNER, ADMINISTRATOR, ALL	
Case Sensitive	TRUE, FALSE	
# of previous passwords		

PASSWORD_POLICY: Sub-String from Last Password Rule: Password cannot contain substring of last password. This check can be case sensitive or case insensitive.		
Description	**Value Options**	**Chosen Value**
Enabled	TRUE, FALSE	
Rule Type	ALL – Always applicable CREATE - applicable only when an User account is being created CHANGE - applicable only when password is changed CREATE_AND_CHANGE - applicable when password is created or changed.	
User Type	LEARNER, ADMINISTRATOR, ALL	
Length	Password cannot contain substring from last password containing same # of characters	
Case Sensitive	TRUE, FALSE	

PASSWORD_POLICY: Minimum Time Between Password Change Rule: Password cannot be changed before the minimum time between password change has elapsed.		
Description	**Value Options**	**Chosen Value**
Enabled	TRUE, FALSE	
Rule Type	ALL – Always applicable CREATE - applicable only when an User account is being created CHANGE - applicable only when password is changed CREATE_AND_CHANGE - applicable when password is created or changed.	
User Type	LEARNER, ADMINISTRATOR, ALL	
Number of Days	90	

PASSWORD_POLICY: Password Same As Esig Rule: Password cannot be same as the Users electronic signature (PIN).		
Description	**Value Options**	**Chosen Value**
Enabled	TRUE, FALSE	

PASSWORD_POLICY: Password Same As Esig Rule: Password cannot be same as the Users electronic signature (PIN).		
Rule Type	ALL – Always applicable CREATE - applicable only when an User account is being created CHANGE - applicable only when password is changed CREATE_AND_CHANGE - applicable when password is created or changed.	
User Type	LEARNER, ADMINISTRATOR, ALL	
Case Sensitive	TRUE, FALSE	

17.4.7 REPORT_SYSTEM

This section allows for the setting of which reports can only be run during scheduled background jobs timeframes. This is to prevent large reports being running during peak business times and having a potential performance impact on the system.

System Admin > Configuration > System Configuration > REPORT_SYSTEM

REPORT_SYSTEM: Asynchronous Report Generation		
Default Value	**Chosen Value**	**Description**
Configuration of how to store asynchronous (background) report data in the DB		
10MB		asyncStorageMaxSize=10485760 This is the maximum size (in bytes, or KB/MB/GB) to store, after which the report is aborted.
30		asyncStorageTTLDays=30 This is the number of days after which a report stored in the DB will be removed (the job will remain, however).
Background jobs and emailing reports.		
Report		asyncEmailedReportFileName=report Name to use in emailing the report file; output format appended as extension. The filename of reports SuccessFactors emails to administrators.
PLATEAU		asyncLastUpdateUser=PLATEAU This setting is the last update Administrator to use in creating/updating database records from the report served.

REPORT_SYSTEM: Report Execution		
Default Value	**Chosen Value**	**Description**

REPORT_SYSTEM: Report Execution		
300		onlineTimeoutPeriod=300 Timeout period for running reports online in **seconds**. This value has to be less than the HttpRequest timeout set on the web server or app server.
1000		backgroundTimeoutPeriod=1000 Timeout period for running reports as background job in **seconds**. This value has to be less than the transaction timeout specified on the app server.
UserCurriculumStatus		scheduleOnlyReports.UserCurriculumStatus=true List of reports that can only be scheduled to run in the background.

REPORT_SYSTEM: Report Format		
Default Value	**Chosen Value**	**Description**
/WEB-INF/fonts/arialuni.ttf		baseFontFile=/WEB-INF/fonts/arialuni.ttf This must be an actual font file; will look in the servlet context first, then as an actual file. Specify a unicode font for full utf-8 compatibility.
Identity-H		baseFontEncoding=Identity-H The encoding defines the association between a code and a character. This is not typically changed. Some common codes: Identity-H: horizontal Identity-V: vertical Cp1250: Central Europe Cp1252: Western Europe Cp1257: Baltic
Size: 16		Font Styles: Title
Size: 12		Table Header
True		Bold Table Header
Red: 102 Green: 102 Blue: 153		Color
Size: 10		Table Column Header
True		Bold Column Header
Size: 8		Summary Column Header
True		Bold Summary Column Header

REPORT_SYSTEM: Report Format		
Size: 10		Data
Size: 8		Page Header
Size: 8		Page Footer
Size: 8		Separator
3%		Query Indent Width This setting is the percent of the page width per level of indent that the query table/data indents.
Red: 240 Green: 240 Blue: 240		Query Resumption Indicator Color After the query prints detail, SuccessFactors prints a line of this specified color.
Red: 240 Green: 240 Blue: 240		Tabular Row Alternating Background Color Alternating rows in a tabular style query use this background color.
Red: 220 Green: 220 Blue: 220		Summary Row Border Color SuccessFactors boxes summary rows using this border color.

REPORT_SYSTEM: Adobe Download Link		
Default Value	**Chosen Value**	**Description**
Out-of-box		Href This setting is the download URL of Adobe Acrobat Reader.
Adobe Acrobat Image		
Out-of-box		Src
Out-of-box		Label
Width: 88 Height:31 Border: 0		Size

17.4.8 SEARCH

This configuration contains the general administrator settings for the search framework.

System Admin > Configuration > System Configuration > SEARCH

SEARCH: General Search Settings		
Default Value	**Chosen Value**	**Description**
2000		resultMaxRowAllowed= This entry would now limit the maximum number of rows returned by Flex searches.
10		resultRowsPerPage= Default number of rows displayed per page.
5		Available options to the User for rows per page.

SEARCH: General Search Settings		
Default Value	**Chosen Value**	**Description**
10 25		rowsPerPageOptions[5]=true rowsPerPageOptions[10]=true rowsPerPageOptions[25]=true
false		studentShowAllOption=
label.All		studentShowAllLabel=
5 10 25 50 500		Available options to the Admin for rows per page. adminRowsPerPageOptions[5]=true adminRowsPerPageOptions[10]=true adminRowsPerPageOptions[25]=true adminRowsPerPageOptions[50]=true adminRowsPerPageOptions[500]=true
false		adminShowAllOption=
label.All		adminShowAllLabel=
The following two values (Entity Search and Picker Search) only apply if GlobalSearchContext is enabled. The name attribute can be set to EntitySearchDefaultToResultPage or PickerSearchDefaultToResultpage. Entity Search appears when an administrator clicks a menu (like User Management > References > Employee Types). Picker Search appears when an administrator clicks the Picker icon . If you set either entity search or picker search property to true, then, by default, all searches of that type open a results page instead of a sub search page.		
false		[EntitySearchDefaultToResultPage]= If Global Search Context is "true" and this setting is "true", then the search skips the search criteria page and show search results directly.
false		[PickerSearchDefaultToResultPage]=
false		showSQL= Setting this to true will print out SQL for debugging purposes.
1		catalogSearchResultsDisplayPriceType= A list a valid display prices. 0 - Show All Prices 1 - Show Min Price 2 - Show Max Price
true		catalogSearchResultsOrderBy=
CPNT_TYP_ID, CPNT_ID, REV_DTE		catalogSearchResultsOrderByColumns= The selected column must be one of the columns in the validColumns list. Valid order by columns are CPNT_TYP_ID,CPNT_ID,REV_DTE,SKU,DESCRIPTIO N,CPNT_CLASSIFICATION
1000		maxInListItems= Limit the number of in list items in SQL statement
500		maxResultsAllowedForAdminPowerSearch= Max results per Admin search are set here, any numbers higher than 10000 will be ignored and a max of 10000 will be used
-_'/\\		powerSearchWhitespaceCharacters= Characters that are treated as blank spaces between tokens. The predefined default values for whitespace are 'space' and 'tab'. The BASIC_LEXER uses whitespace

SEARCH: General Search Settings		
Default Value	**Chosen Value**	**Description**
		characters (in conjunction with punctuations and newline characters) to identify character strings that serve as sentence delimiters for sentence and paragraph searching.
true		useGlobalCaseSensitivitySetting= For all searches in the application, enable="true" disregards each individual search selector setting, enable="false" uses the settings in the selector file.
true		globalCaseSensitive= If Global Case Sensitivity is “true”, then this setting configures the default *Case Sensitivity* value of all searches (“true” defaults to Case Sensitive, “false” defaults to not Case Sensitive).
[OP_STARTWITH]=true		matchOptionDefaults All the criteria in all the searches will default to the first matched value in this list The options are: OP_EXACTMATCH = OP_EQUAL = OP_STARTWITH = OP_CONTAINS = OP_ANYMATCH = "in" OP_ANYMATCH_NOT = "not in" OP_GREATER = OP_LESS = OP_GREATER_EQUAL = OP_LESS_EQUAL = OP_NULL = OP_NOTNULL =
[OP_GREATER]=true		matchOptionDefaults

17.4.9 SUCCESSFACTORS_INTEGRATION

This configuration contains the settings for setting up SuccessFactors BizX Integration.

System Admin > Configuration > System Configuration > SUCCESSFACTORS_INTEGRATION

SUCCESSFACTORS_INTEGRATION		
Default Value	**Chosen Value**	**Description**
		inWebservicesHeaderParameterName=sessionID
		cdpServiceEndpoint=https://qamain2.successfactors.com/sfapi/v1/soap12
		cdpServiceHeaderSessionIdName=sessionID
		cdpServiceParameterUsername=admin
		cdpServiceParameterPassword=77dc7de0bd043051
		cdpServiceParameterDeveloperKey=NOT_USED

17.4.10 SUCCESSFACTORS_LEARNING

This configuration contains the settings for setting up SuccessFactors BizX Learning.

System Admin > Configuration > System Configuration > SUCCESSFACTORS_LEARNING

SUCCESSFACTORS_LEARNING		
Default Value	**Chosen Value**	**Description**
false		successFactorsLearningEnabled=false
Plateau1		successFactorsCompanyID=Plateau1
https://learning.successfactors/sf/learning		successFactorsDeepLinkURL=https://learning.successfactors/sf/learning The SuccessFacotrs App URL. can use the DNS entry to map it to the real host. It is used such as in the plateau generated deep links in the integration mode. No slash at the end.

17.4.11 USER TODO LIST

The User Config. functionality allows an administrator to control the calendar ordering of the User interface To Do list which groups everything into several buckets. The "noduedate" bucket covers actions that don't have an associated due date. The buckets "overdue", "later" and "noduedate" should not be changed except, if desired, to change the wording of the associated labels.

Rules for adding/modifying the buckets;

- Bucket ID must be unique
- Matching label must be defined
- The "overdue" bucket ID must have the "days" value set to 0
- Non-overdue buckets with "days" defined can be added/modified/customized
- The enabled flag controls whether this bucket is shown by the UI

System Admin > Configuration > System Configuration > USER TODO LIST

USER TODO LIST		
Bucket	**Default Values**	**Chosen Values**
Overdue	timeline.buckets.overdue.id=overdue timeline.buckets.overdue.enabled=true timeline.buckets.overdue.label=label.todo.view.Timeline.Overdue timeline.buckets.overdue.days=0	**Same**
Due in the next week	timeline.buckets.next1weeks.id=next1weeks timeline.buckets.next1weeks.enabled=true timeline.buckets.next1weeks.label=label.todo.view.Timeline.Next7Days timeline.buckets.next1weeks.days=7	Enabled = **false**
Due in the next month	timeline.buckets.next30days.id=next30days timeline.buckets.next30days.enabled=true timeline.buckets.next30days.label=label.todo.view.Timeline.Next30Days timeline.buckets.next30days.days=30	**Same**
Due more than a month from now	timeline.buckets.later.id=later timeline.buckets.later.enabled=true timeline.buckets.later.label=label.todo.view.Timeline.Later timeline.buckets.later.days=null	**Same**
No due date	timeline.buckets.noduedate.id=noduedate timeline.buckets.noduedate.enabled=true timeline.buckets.noduedate.label=label.todo.view.Timeline.NoDueDate timeline.buckets.noduedate.days=null	**Same**

18) Connectors

You can use the connectors to schedule when you want the system to import data into SuccessFactors Administration. The system uses the information that you supply in the CONNECTORS configuration ID (System Admin>Configuration>System Configuration) when a scheduled connector executes. Because the file that you import must be structured specifically for the data type (for example, domain, enrollment, item, job code, and so on) that you're importing, you should contact a SuccessFactors representative to obtain a properly structured file. Before you schedule a connector to execute, you should review the settings in the CONNECTORS Configuration ID (System Admin>Configuration>System Configuration).

18.1.1 Domain Connector

System Admin > Connectors > Domain Connector

Connector Scheduling			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ___ number of hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

18.1.2 Item Connector

System Admin > Connectors > Item Connector

Connector Scheduling			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ___ number of hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

18.1.3 Job Code Connector

System Admin > Connectors > Job Code Connector

Connector Scheduling	
Schedule This Process:	Options: Y/N

Connector Scheduling			
Schedule Frequency:	☐	Hourly	Every ___ number of hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

18.1.4 Learning History Connector

System Admin > Connectors > Learning History Connector

Connector Scheduling			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ___ number of hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

18.1.5 Organization Connector

System Admin > Connectors > Organization Connector

Connector Scheduling			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ___ number of hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

18.1.6 Position Connector

System Admin > Connectors > Position Connector

Connector Scheduling		
Schedule This Process:	Options: Y/N	
Schedule Frequency:	☐ Hourly	Every ___ number of hours
	☐ Daily	
	☐ Weekly	Day:
	☐ Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*	
Time Zone:	*America/New York*	
Email address:	*ADMIN@<Customer Name>.com*	

Notes

18.1.7 Registration Connector

System Admin > Connectors > Registration Connector

Connector Scheduling		
Schedule This Process:	Options: Y/N	
Schedule Frequency:	☐ Hourly	Every ___ number of hours
	☐ Daily	
	☐ Weekly	Day:
	☐ Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*	
Time Zone:	*America/New York*	
Email address:	*ADMIN@<Customer Name>.com*	

Notes

18.1.8 Scheduled Offering Connector

System Admin > Connectors > Scheduled Offering Connector

Connector Scheduling		
Schedule This Process:	Options: Y/N	
Schedule Frequency:	☐ Hourly	Every ___ number of hours
	☐ Daily	
	☐ Weekly	Day:
	☐ Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*	
Time Zone:	*America/New York*	
Email address:	*ADMIN@<Customer Name>.com*	

Notes

18.1.9 User Connector

System Admin > Connectors > User Connector

Connector Scheduling			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ___ number of hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

18.1.10 User Connector - Federal

System Admin > Connectors > User Connector - Federal

Connector Scheduling			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ___ number of hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

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18.1.11 User Compensation Connector

System Admin > Connectors > User Compensation Connector

Connector Scheduling			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ___ number of hours
	☐	Daily	

Connector Scheduling			
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

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18.1.12 User Compensation History Connector

System Admin > Connectors > User Compensation History Connector

Connector Scheduling			
Schedule This Process:	Options: Y/N		
Schedule Frequency:	☐	Hourly	Every ___ number of hours
	☐	Daily	
	☐	Weekly	Day:
	☐	Monthly	Date:
Time of Day:	*12 - 5 AM Maintenance Timeslot (sequenced with other APMs)*		
Time Zone:	*America/New York*		
Email address:	*ADMIN@<Customer Name>.com*		

Notes

19) Admin Roles and Domain Restrictions

Use the embedded Excel spreadsheet below to identify and track administrator Roles and Domain Restrictions, and document each Role with the appropriate workflows and Domain Restrictions. Double click the file to open in Excel. Saving the file will update the embedded file but you may wish to save it locally as well.

C:\SVN_Current\PSO'
ENABLE\trunk\Phase

A) Technical Deliverables

An overview of each technical deliverable for the implementation should be documented in this section. Do not document the actual requirements in this section. Reference the actual separate document that includes the detailed requirements. Add/remove sections as necessary.

Customizations

Notes

Data Migration

Notes

SSO Interface

Notes

HR Interface

Notes

Learning History Interface

Notes

Custom Report(s)

Notes