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# First Steps in SAP® SuccessFactors Performance and Talent Management

- ▶ Fundamentals of SAP SuccessFactors Talent Management functionality
- ▶ Key functionality including tiles, menus, company information, admin center & upgrade center
- ▶ Talent search and success planning tools
- ▶ Reporting tools including list view, spotlight view, and classic view

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## 2 Platform & Employee Profile

In Chapter 1, you learned the very basic concept of what SuccessFactors is, a little history as of how SuccessFactors got started and evolved, and about the structure of these books and what I will cover about SuccessFactors Talent Management modules.

This chapter will describe the basics of the platform, as well as the Employee Profile, which is an extremely important module since it brings many other modules together.

Let's take a look at what the SuccessFactors platform looks like.

### 2.1 Platform overview

The first step to start learning about SuccessFactors is to have access to the system. Since SuccessFactors is a cloud solution it is accessed via a web browser.

The most commonly used browsers that are compatible with SuccessFactors are:

- ▶ Mozilla Firefox
- ▶ Google Chrome
- ▶ Microsoft Windows Internet Explorer
- ▶ Microsoft Edge
- ▶ Apple macOS Safari

#### SuccessFactors instance




A SuccessFactors instance is simply your SuccessFactors system.

Depending on which data center your SuccessFactors instance is hosted, you will have a different URL that you would use to access.

When SuccessFactors is implemented, your partner will let you know exactly which URL you need to access the system.

A user will enter the Company ID, which is how the system will know the company you are trying to access, and then you will enter your Username and Password like shown on Figure 2.1, just like any other cloud system you might have already used.

**Data centers are assigned based on geographical location**



If your company is based in the US, most likely your instance will be hosted in one of the data centers located physically in the United States. Same for Europe, Asia, etc. Normally data centers are assigned based on geographical location of the main company offices.



Figure 2.1: SuccessFactors login page sample

Notice in Figure 2.1—a sample of the login page, how there is a background image and the SuccessFactors logo.

The majority of images in this book are taken from my personal SuccessFactors demo system, so there are several items I have “customized” to match my preferences.

### Look and feel of the system



I do switch between different themes to make a point of how this affects the look and feel of the system.

The background image and logo of course will be adjusted to match your company’s brand if desired.

At this point I would like to pause to point out that the majority of companies who use SuccessFactors take advantage of Single Sign-On (SSO) capabilities, which SuccessFactors supports.

By using SSO, the SuccessFactors URL for your company would be hosted in your SSO provider, which means that users would never have to enter their SuccessFactors credentials (username/password).

They would just simple login into their computer, or their “company portal”, or into whatever SSO architecture they have, and they would get access to everything, including SuccessFactors, by just entering their “master” credentials once.

Depending on whether you are using regular access to the system by going to a specific URL and then entering your username and password, or taking advantage of SSO technology, the first page you will see (landing page) will be the SuccessFactors home page.

## 2.1.1 Home page

The home page will be the landing page every time any user enters the system.

## Go directly to Admin Center



If you are a SuccessFactors administrator, you can configure the system so that once you log in, it will take you directly to Admin Center. More on Admin Center later on.

The home page, as pages for all modules in the system can be “themed” according to your company brand, including the logo.

As shown in Figure 2.2, you will see your company logo, then two menus, which we will discuss in detail later in this chapter.

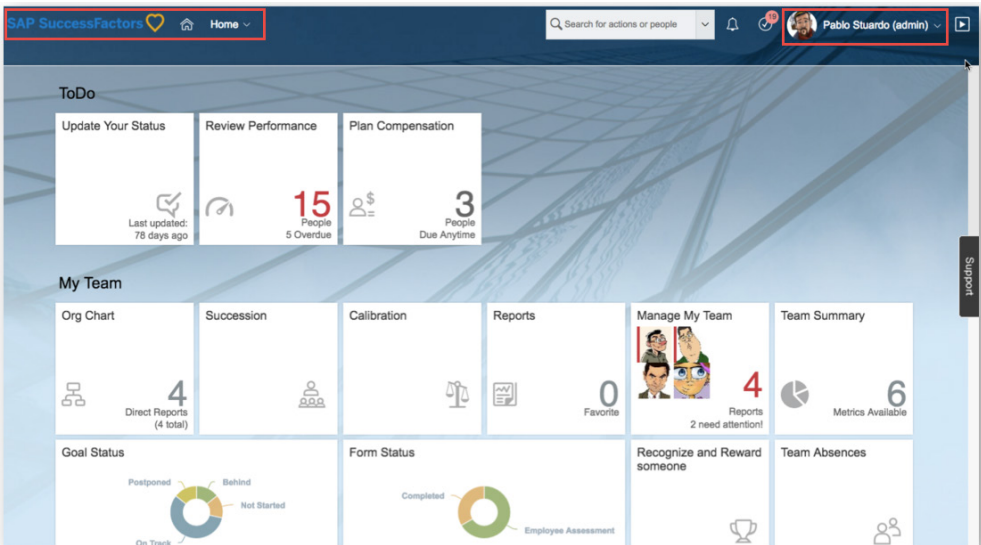


Figure 2.2: SuccessFactors home page sample

The core items on the home page are called “tiles”. Let’s learn more about them.

## 2.1.2 Tiles

Tiles, as shown in Figure 2.2, are squared-shaped items that contain some type of information.

The idea behind tiles is to offer users a dashboard all on one screen in which they can see, navigate and monitor a huge range of items across the suite.

It is important to understand that the home page is quite flexible. Tiles can be dragged and dropped into different positions within the screen and their names can be changed.

Tiles can be configured in various ways:

- ▶ Mandatory for all users (all users will see that particular tile).
- ▶ Optional, which means that each user has the ability to hide any tile that is not mandatory.
- ▶ Dynamic, which means that the system would only display tiles that are relevant to each user. For example, the “Manage My Team” tile would only display to users who actually have direct reports. Anyone without direct reports would never see the tile.

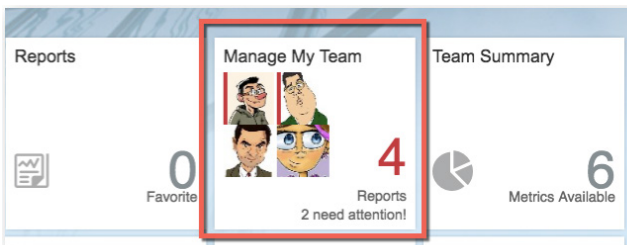


Figure 2.3: Manage My Team tile in the SuccessFactors home page

The majority of tiles shown in Figure 2.2 and Figure 2.3 are standard tiles, which means that they are automatically enabled when each SuccessFactors module is implemented.



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