SuccessConnect

HOL106 DE&I
Cultivate Diversity, Equity, and Inclusion Using SAP SuccessFactors Solutions

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Contents

Processes and systems in human resources lay the foundation of inclusiveness. In this hands-on lab, learn how to use the people profile to capture pronunciations and preferred pronouns. Understand how to define name format and include additional gender identification values at the country level using configurations in the SAP SuccessFactors Employee Central solution. By accurately and consistently displaying this information across SAP SuccessFactors solutions, you can help foster an inclusive work environment that allows employees to feel seen and represented.

Lab 1: Configuring the General Display Name

In this activity, you will configure employee names that can be displayed consistently across the SAP SuccessFactors HXM Suite. With this enabled, employees' chosen names are displayed in all interactions where a legal name isn't required, while administrators and HRBPs can also access a person's legal name whenever needed.

Prerequisites

- You have the **Administrator Permissions Manage System Properties Company System and Logo Settings** permission.
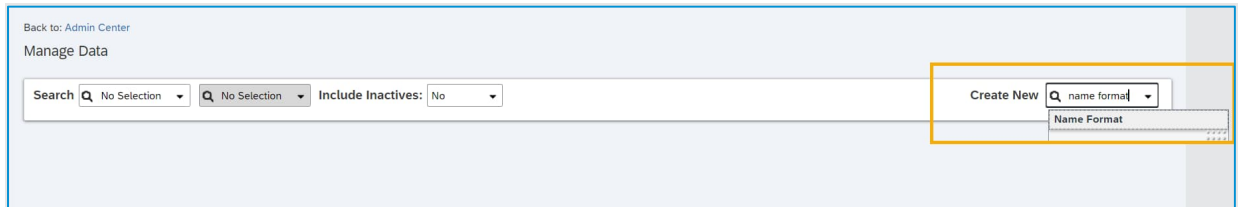
There are two ways to adopt the general display name feature. One is to assign a name format to be used as a general display name to the legal entity, and the second is to assign the name format globally through People Profile. In this lab, we will only use the first one.

Note: For those with SAP SuccessFactors Recruiting solution, refer to this article on how Recruiting adapts the general display name: 3340377 - Adoption of General Display Name in Recruiting - SAP for Me.
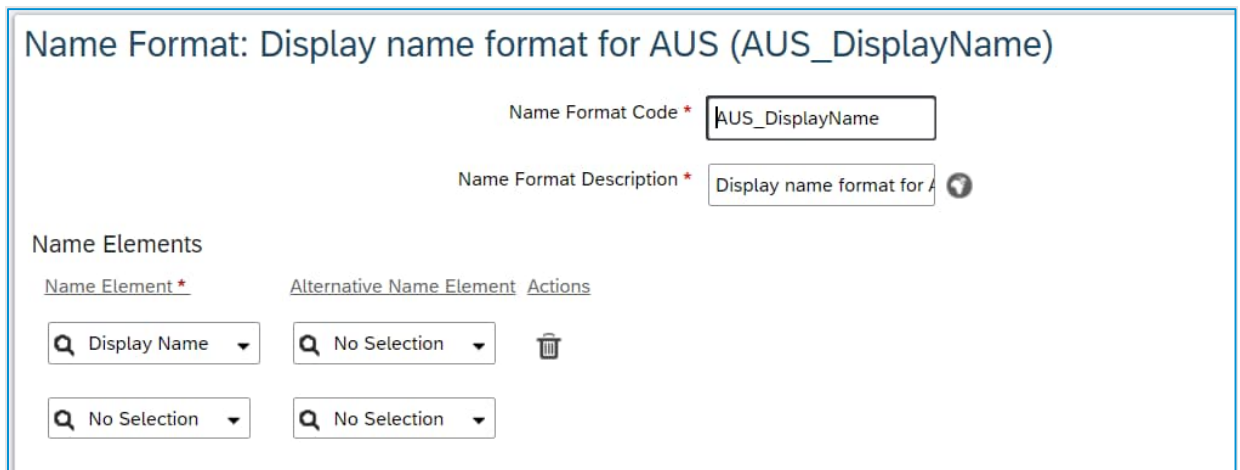
Task 1.1: Assign the Display Name format to a Legal Entity

NOTE: *Our system already has preconfigured name formats, but we will create a new name format for this lab and assign it to a Legal Entity.*

1. Navigate to **Manage Data** using **Action Search**
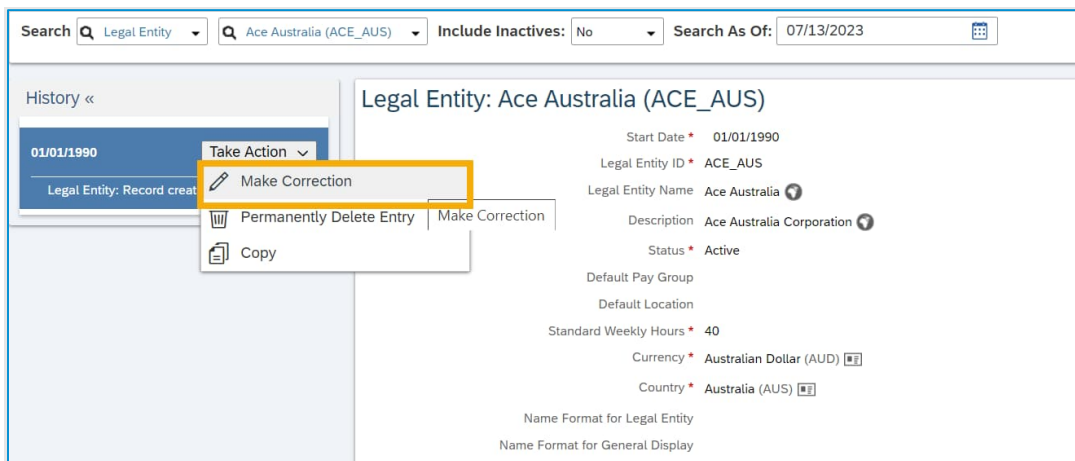2. In the **Create New** dropdown, select **Name Format**

3. Enter **AUS_DisplayName** in the **Name Format Code** field. Enter **Display Name format for AUS** in the **Name Format Description** field.
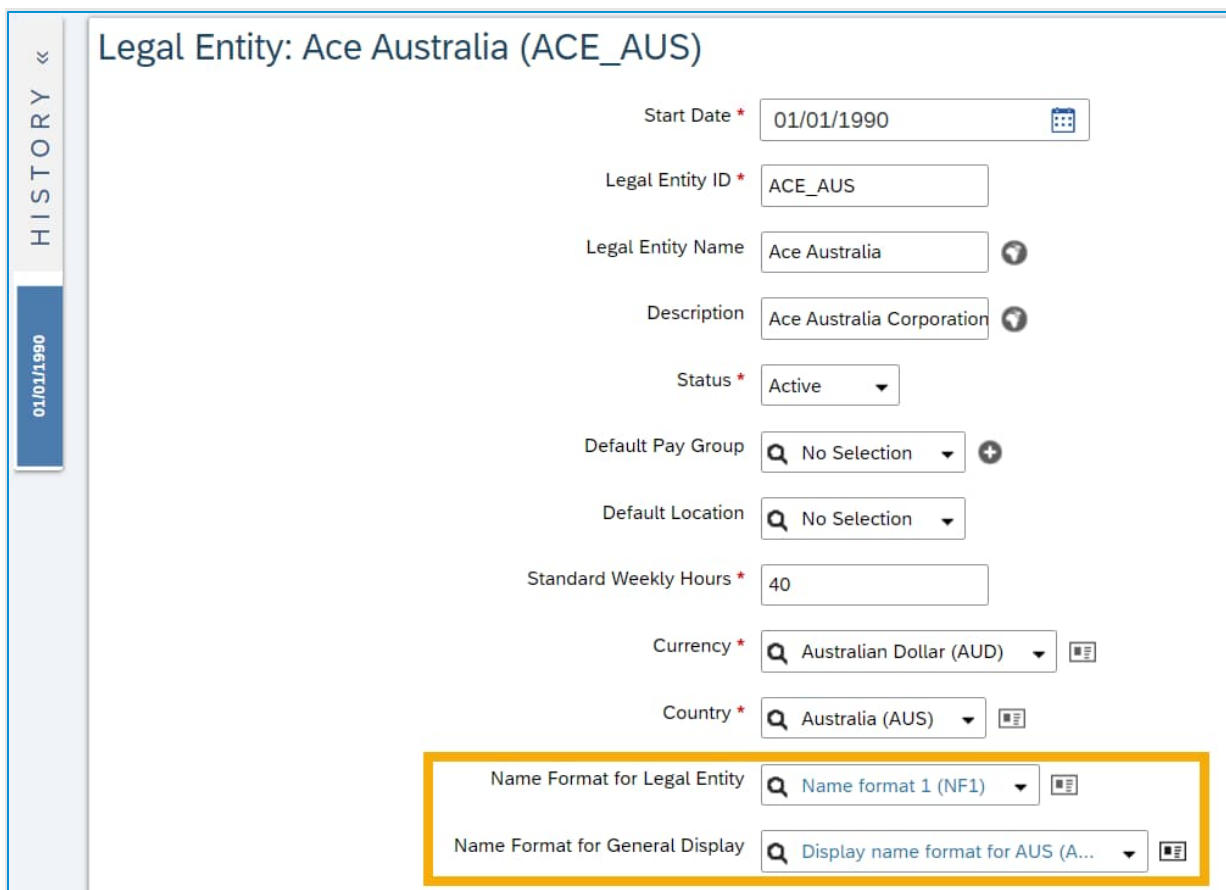

4. The Name Element dropdown has all the name fields that come standard in the Personal Information object. For this lab, select **Display Name** in the dropdown. Leave the Alternate Name Element blank.
5. Select **Save.**
6. Still, in the Manage Data page, choose **Legal Entity** in the first dropdown.

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7. Select **Ace Australia (ACE_AUS)** in the second dropdown. Select **Take Action → Make Correction** to open the record.

8. In the **Name Format for Legal Entity** dropdown, select **Name Format 1 (NF1).** In the **Name Format for General Display** dropdown, select **Display Name for AUS (AUS_DisplayName).** Select the card icon to preview the name content.

By assigning a name format for general display to ACE Australia, Australian employees could use the display name field in Personal Information for the name they chose to display in the system, e.g., People Profile.

9. Select **Save.**

Before we enable the adoption of the General Display Name, let's look at two employee profiles. Gina Walker from ACE Australia and Marcus Hoff from ACE USA.

10. Navigate to **Gina Walker's profile** using the **Action Search**. Note that the name in the profile header is the default, first name + last name.

11. Go to the **Personal Information** block. Notice the name entered in the Display Name field, **Gigi Walker.**

12. Navigate to **Marcus Hoff's profile** using the **Action Search**.

13. Go to the **Personal Information** block. Notice the name entered in the Display Name field, **Mark Hoff.**

Now, let's go ahead and enable the adoption of a general display name.

14. Navigate to **Company System and Logo Settings** using **Action Search**

15. Use **CTRL+F** on the keyboard and search for **Enable Adoption.** Select the **Enable adoption of General Display Name** checkbox.

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Admin Center

Back to Admin Center

Go To Customer Community   Admin Resources   Handout Builder

Company Logo

Use this page to set the company logo's URL

Logo Requirement
Format: Transparent GIF (RGB Recommended)
Dimensions: Should be no larger than 210 pixels wide by 40 pixels high

URL of the Company Logo

/ui/uicore/img/logo_7a5a3299cc5f1e01f0aeb737

[Set Company Logo URL] [Reset]

Company System Setting

Use this page to change the system setting for the company

☑ Outlook Calendar Integration
☑ Enable Centralized Services for Dependents (Applicable for data imports from UI and API and saving changes on Editing UI)
☑ Enable Centralized Services to Save Changes on the Manager Self-Service UI for Change Job and Compensation Info
☑ Enable Centralized Services to Save Changes on the Manager Self-Service UI for Termination Details
☐ Enable rating label localization on Live Profile trend blocks. This applies to the rating data that comes from forms. (Note: After you turn on this option, in some cases, for example, when you change rating scales after form completion, rating label inconsistencies might occur. We don't recommend that you change rating scales associated to launched forms.)
☐ Display Performance Score in HR Inbox
☑ Activate Email Validation in scorecard
☐ Enable To-Do Panel
☑ Enable adoption of General Display Name ⓘ
[Refresh General Display Name] ⓘ
☐ Enable the name format selected in Configure People Profile to apply globally
☐ Hide job title in People Search and org charts (Company Org Chart, Calibration Org Chart, and Succession Org Chart)
☑ Show all active employments (for Global Assignment and Concurrent Employment) on Quickcard, Org Chart, and Global Search results
☐ Show Current Absence Status
    Limit to:
    [None ▾]
    ("None" specifies that there is no limit to who will see current absence statuses, and "All" specifies that all of the currently configured Role-based Permission roles and groups have been selected for the limit.)
☐ Show inactive user in people search (requires Role-based Permissions)
☑ Search for people by additional keywords such as job title, location, department, or division (requires Role-based Permissions)
☐ Search People by Employee Central Name Fields
☐ Enable fuzzy search function for People Search
☐ Enhanced screen reader support and keyboard navigation.
☑ Enable Show Me (Last updated by admin on 11/29/2012. Read Show Me Agreement)
☐ Do not overwrite the Manager field when it contains 'NO_MANAGER' value in the user import file
☐ Disable Presentations Folder Home Page
Video Help Settings
☑ Show Getting Started Help videos on home page.
☐ Selecting a user from global header search will show the quickcard
☐ Hide Global Navigation Menu (Module Picker)
☑ Use System Generated Password by Default (Only applies to Employee Import, Bulk Employees Import and Delta Employees Import in Provisioning and APIs.)
Please select preferred method to handle a change to this form template's name:
    ○ All documents will display their form template name at the time the document was created. This option does not support translations of the document name.

NOTE: If you would like to adopt the same general display name format across all entities, choose the setting *Enable the name format selected in Configure People Profile to apply globally. Use the Refresh General Display Name setting* whenever there is a change in the display name format to a legal entity or to toggle between the legal entity and people profile format.

16. Scroll down and select **Save Company System Setting**. This will start a migration job.

Migration job started. The "Enable adoption of General Display Name" option will be enabled when the migration job is completed.

To test whether the display name works, search again for Gina Walker using the action search. You will notice that the name format is now displaying Gigi Walker.

Gigi Walker (gwalker) ⌄
Client Service Director, Australia
Client Service (SVCS), Professional Services (SVC)
Sydney (AU_SYD) (CST)

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If we search for Marcus Hoff, the name used is still his first name + last name format because we only configured the general display name format to legal entity Australia but not legal entity USA.

Marcus Hoff (mhoff) ⌄
Sales Director, NE
Sales (SALES), Industries (IND)
Philadelphia, PA (US_PHL) (US/Eastern)
Local time: Thursday, 10:31:59 PM

This feature allows employees across different countries to choose what name they want to display in the system.

This completes Lab #1.

Lab 2: Configuring Country-Specific Gender Values

The gender field in the Personal Information element currently supports five gender values: **Female**, **Male**, **Unknown**, **Undeclared**, and **Others**. However, some countries have their own defined values, but since the gender values in Personal Information are hard-coded, you cannot add any other values to the standard five.

To collect country/region-specific information related to genders, a predefined Gender field (field ID:gender-country-specific) can be enabled in the Global Information section with the picklist ID **'gender_XXX,'** where **XXX** is a 3-letter ISO country/region code.

In this lab, you will learn how to create the picklist and enable the country-specific gender field in Global Information.

This exercise does not cover how the standard gender field is updated.

Note: For those with SAP SuccessFactors Recruiting solution, please refer to the Implementation Design Principle for how gender mapping can be configured between Employee Central and Recruiting. This is not part of the lab.

Task 2.1: Create a Country-Specific Gender Picklist

Let's start with creating a picklist for the United States and Germany. You will use the provided **CSV files** in this task.

1. Navigate to **Import and Export Data** using Action Search.
2. Select **Import Data** in the Action to perform dropdown

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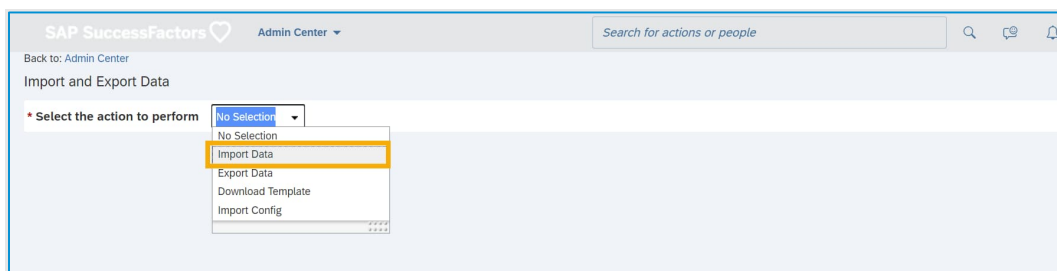
3. Select **Picklist** in the Generic Object dropdown. Browse for the **Picklist File.csv** provided for this lab. Select Unicode (UTF-8) as the file encoding. Leave all other fields to their default values.

4. Select **Validate.**

5. Select **View Result.** The Scheduled Job Manager opens in a different tab. Verify that the validation has been completed with no failed records.

6. Go back to the **Import and Export** page.

7. Choose the **Picklist File.csv** again and select **Import.**

8. Select **View Result** to verify if the import is complete.

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9. Go back to the **Import and Export** tab. Select **Picklist-Values** from the Select Generic Object dropdown. Browse for the Picklist-Values.csv file provided for this lab. File encoding is Unicode (UTF-8).

10. Select **Validate.**

11. Select **View Result**. The Scheduled Job Manager opens in a different tab. Verify that the validation has been completed with no failed records.

12. Go back to the **Import and Export** page. Choose the Picklist-Values.csv again and select Import. Select **View Result** to verify if the import is complete.

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13. Navigate to **Picklist Center** using Action Search.

14. Search for **gender_USA**. Select **gender_USA.**

Picklists (1)	As of date	Jul 17, 2023		gender_USA		
Code	Name		Status	Effective Start Date		Parent Picklist
○ gender_USA	gender_USA		Active	Jan 1, 1900		

15. Select the **Active** version to open the values. You can see the three values we created using the CSV file. We will be adding additional gender values.

gender_USA

Versions (1)			
Status	Effective Start Date	Last Modified Date	Last Modified By
Active	Jan 1, 1900	Jul 4, 2023, 11:08:18 PM	Jay Garcia

16. Select the + Add New Value

gender_USA
Effective Jan 1, 1900

Name: gender_USA   Status: Active
Code: gender_USA   Effective Start Date: Jan 1, 1900
Parent Picklist: –   Legacy Picklist ID: gender_USA
Display Order: Alphabetical

Picklist Values (3)			
External Code	Label	Status	Parent Picklist Value
F	Female 🌐	Active	
M	Male 🌐	Active	
USA-X	Non-Binary 🌐	Active	

17. Enter **USA-U** in the External Code. Enter **Undeclared** in the Label. Select **Active** in the Status.

18. Select **Create.**

19. You should now have four values in the gender_USA picklist

gender_USA
Effective Jan 1, 1900

Name: gender_USA   Status: Active
Code: gender_USA   Effective Start Date: Jan 1, 1900
Parent Picklist: –   Legacy Picklist ID: gender_USA
Display Order: Alphabetical

Picklist Values (4)			
External Code	Label	Status	Parent Picklist Value
USA-U	Undeclared 🌐	Active	
F	Female 🌐	Active	
M	Male 🌐	Active	
USA-X	Non-Binary 🌐	Active	

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Task 2.2: Enable the Country-Specific Gender Field in Global Information

Now that you've created the picklist, let's enable the field to store the information.

1. Navigate to **Manage Business Configuration** using **Action Search**

2. Expand the **globalInfo** from the HRIS Elements and choose **globalInfo_DEU.** Select **Take Action → Make Correction**
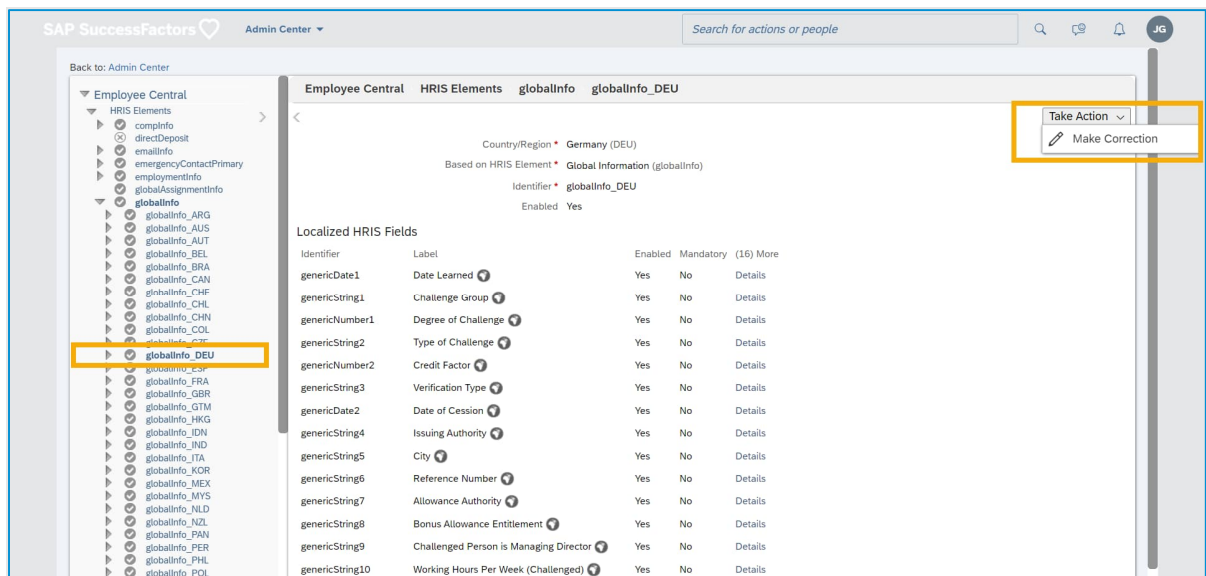
3. Enter **gender-country-specific** in the last field row. Enter **Gender** in the label and select **Yes** in the Enabled column.
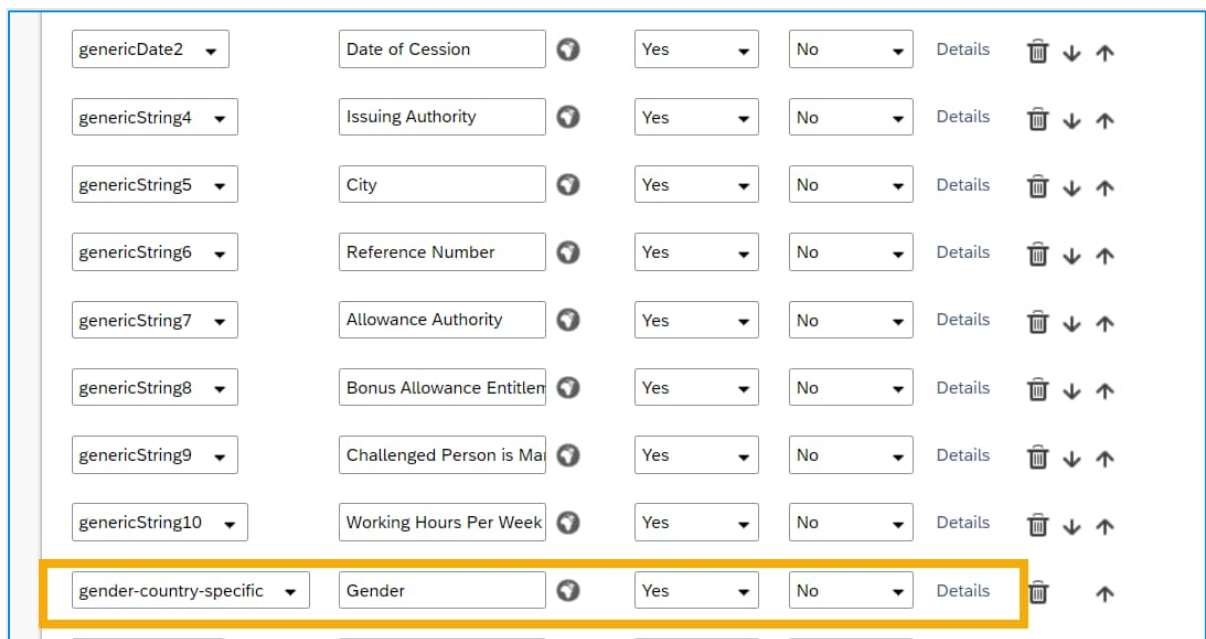
4. Select **Details** to open the attributes. In the **Default Label**, enter **Gender.** In the **Type of Reference Object** attribute, choose **Picklist.** In the **Picklist** attribute, select the **gender_DEU.**

5. Select **Done**.

6. Select **Save**.

7. Select **Confirm** if a message about max length appears.

8. Go to **globalInfo_USA**

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9. Select **Take Action → Make Correction**

10. Enter **gender-country-specific** in the last field row. Enter **Gender** in the label and select **Yes** in the Enabled column.

11. Select **Details.** In the **Default Label**, enter **Gender.** In the **Type of Reference Object** attribute, choose **Picklist.** In the **Picklist** attribute, choose the **gender_USA.**

12. Select **Done**.

13. Select **Save**.

14. Select **Confirm** if a message about max length appears.

Task 2.3: Set the Field Permissions

We must set the permissions to access the field in the profile.

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Note: *Full administration permissions must be limited to an admin group; the role used in this lab is assigned to everyone for expediency and is not indicative of best practices.*

1. Navigate to **Manage Permission Roles** using **Action Search**

2. Select the **System Admin ALL PERMISSIONS** role. Select **Permission.** Go to **Employee Central Effective Dated Entities. In the** Personal Information section, locate the USA-Gender and DEU-Gender fields and select all permission levels. You'll see USA-Gender first before the DEU-Gender in the field list.
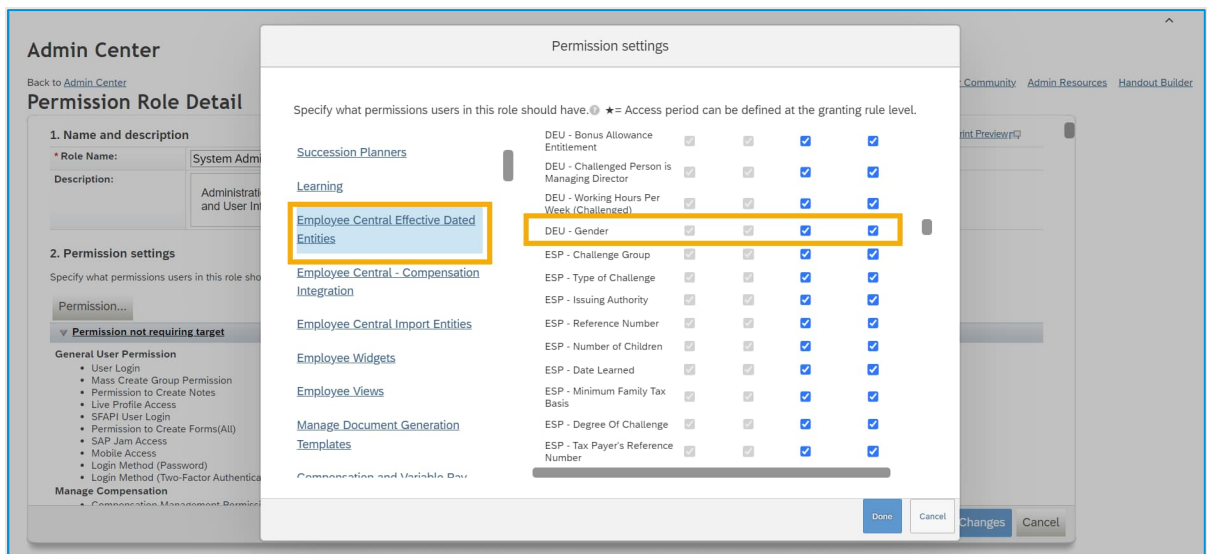
3. Select **Done**. Select **Save Changes.** If prompted to confirm the number of affected users, select **Yes.**

4. **Log out** and **Log back in.**

5. To test if the field is activated, navigate to **Paul Horn's profile**, a German employee. Type Paul Horn in the Action Search to navigate to his profile.

6. Go to **Personal Information** and select **Edit**

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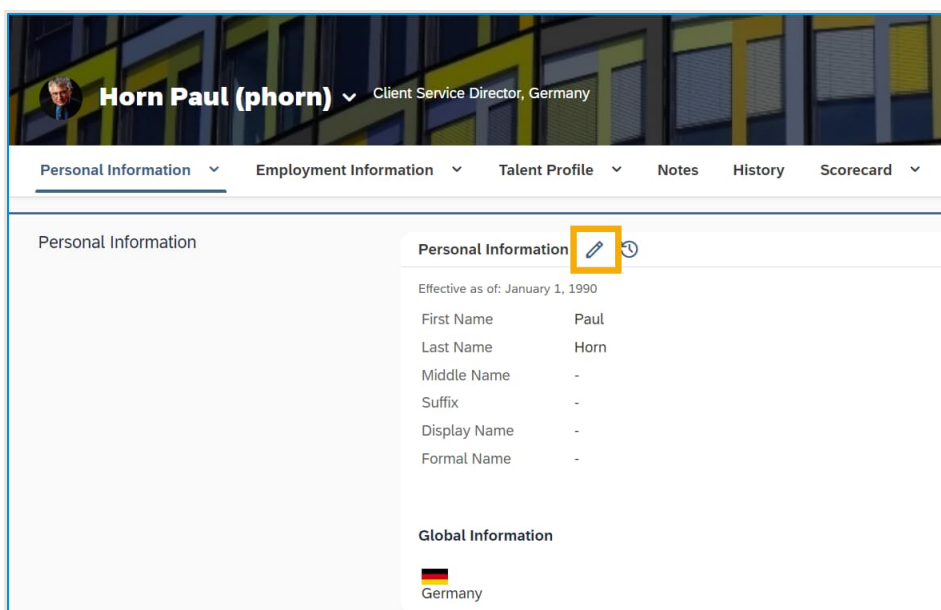
7. Enter **today's date.** Scroll down (select Show More for other fields to appear) to the **Global Information Gender** field and check if the values are visible.

8. Select **Cancel** to close Paul Horn's Personal Information block.

9. Let's also check a US employee's profile. Navigate to **Wilma Sown** using **Action Search.** Go to **Personal Information** and select **Edit**. Enter **today's date.** Select **Add Global Information.**

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10. Select the **United States** from the Country list. Scroll down to the **Gender** field to see the four new values. Select **Cancel** to close the Personal Information block.

This concludes Lab #2.

Lab 3: Configuring Pronouns

Pronouns like "she/her" are increasingly used as designations in emails and profiles. To enable pronouns, you need to configure a PersonPronouns picklist.

Task 3.1: Create the PersonPronouns Picklist

1. Navigate to **Picklist Center** using **Action Search**

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2. Select **+** Create a Picklist. Create the **PersonPronouns** picklist. Enter details as you see in the screenshot. **The Code is space and case-sensitive.**

3. Select **Save**

4. Select **Add New Value**. Create the following values:

Task 3.2: Enable the Pronouns Field

1. Navigate to **Manage Business Configuration** using **Action Search**

2. Go to **Employee Profile→Standard→pronouns.** Select **Take Action → Make Correction**

3. Enter **Pronouns** as the **Label** and **Default Label.** Set **Enabled** to **Yes.** Choose **PersonPronouns** in the **Picklist.**

4. Select **Save.**

Task 3.3: Set the Field Permissions

Set the permissions to access the field in the profile.

Note: Since time is of the essence, we'll only add the permissions to the System Admin role in this lab.

1. Navigate to **Manage Permission Roles** using **Action Search**

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2. Select the **System Admin ALL Permissions** role

3. Select **Permission.** Go to **Employee Data.** Select **Edit** permission of the Pronouns field.

4. Select **Done**.
5. Select **Save Changes**. Select **Yes**. If prompted to confirm the affected population.
6. Log out and Log back in.

Task 3.4: Enable Pronouns, Audio, and Video in the Profile Header

1. Navigate to **Configure People Profile** using **Action Search**
2. Select the **General Settings** header. Select **Allow employees to upload an audio file for name pronunciation. Accept** the End User License Agreement. Select **Allow employees to upload an About Me video. Accept** the End User License Agreement.

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3. Select **Allow employees to maintain their pronouns.**

4. Select **Save.**

Let's test the configuration.

5. Navigate to **My Employee File** using the main navigation menu
6. Select **Header→ About Me.** You can choose **the video file saved in your desktop folder** and **Save**.

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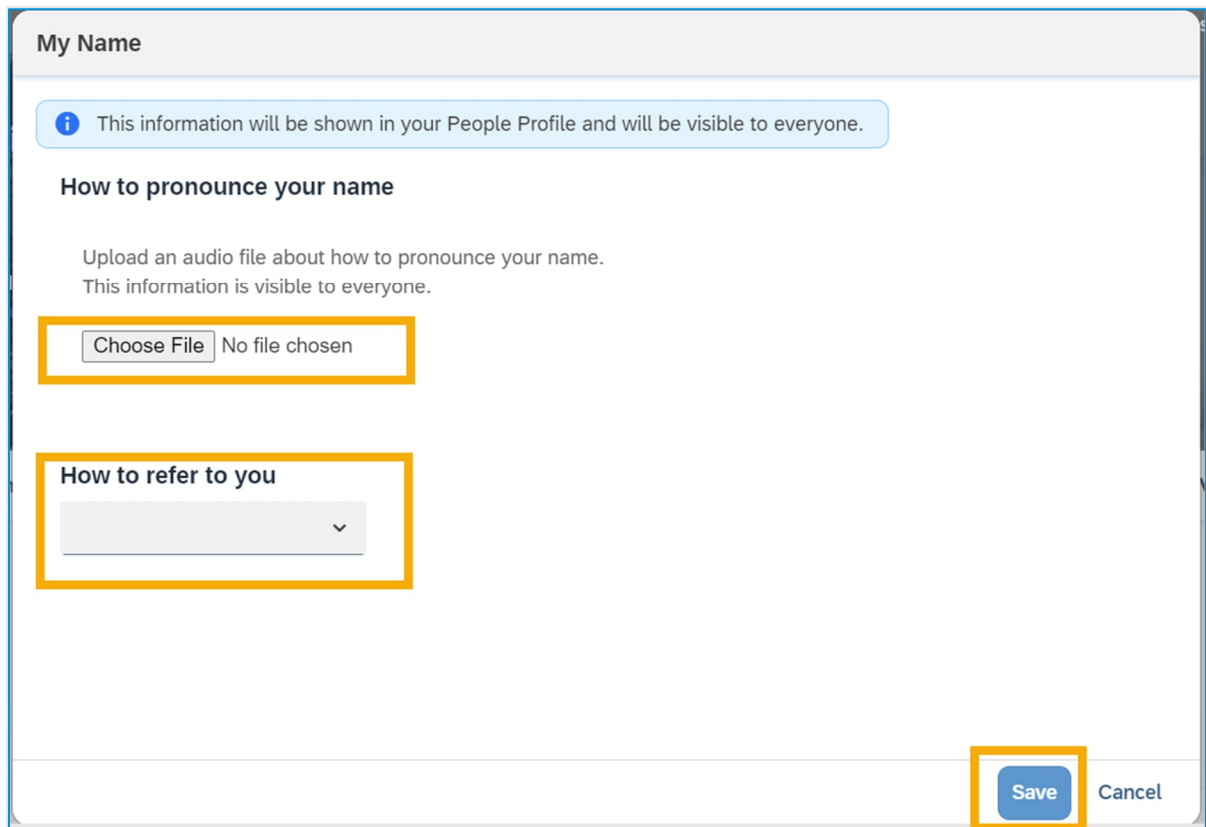
7. Select **Header→My name.** You can choose the **audio file saved in your desktop folder**. Select your choice of pronoun and Save.

8. Refresh the profile page. You will now see the pronoun and the audio and video icons in the profile header for other employees to see.

This concludes Lab #3.

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