

**SuccessConnect**



INTERNAL – SAP AND CUSTOMERS ONLY

## **HOL106 DE&I**

Cultivate Diversity, Equity, and Inclusion Using SAP  
SuccessFactors Solutions

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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.

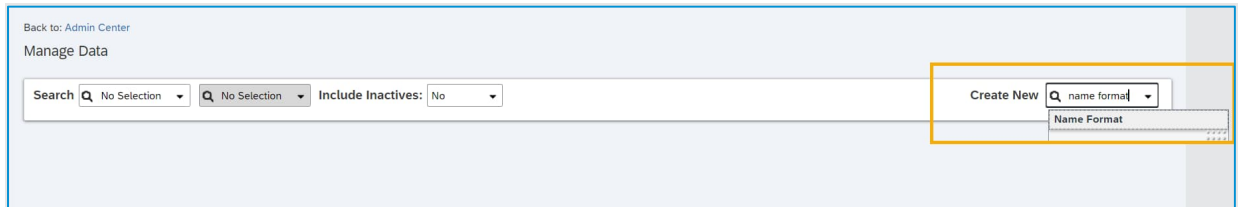
There are two ways to adopt the general display name feature. One is to assign a name format to be used as a general display name to the legal entity, and the second is to assign the name format globally through People Profile. In this lab, we will only use the first one.

**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](#).

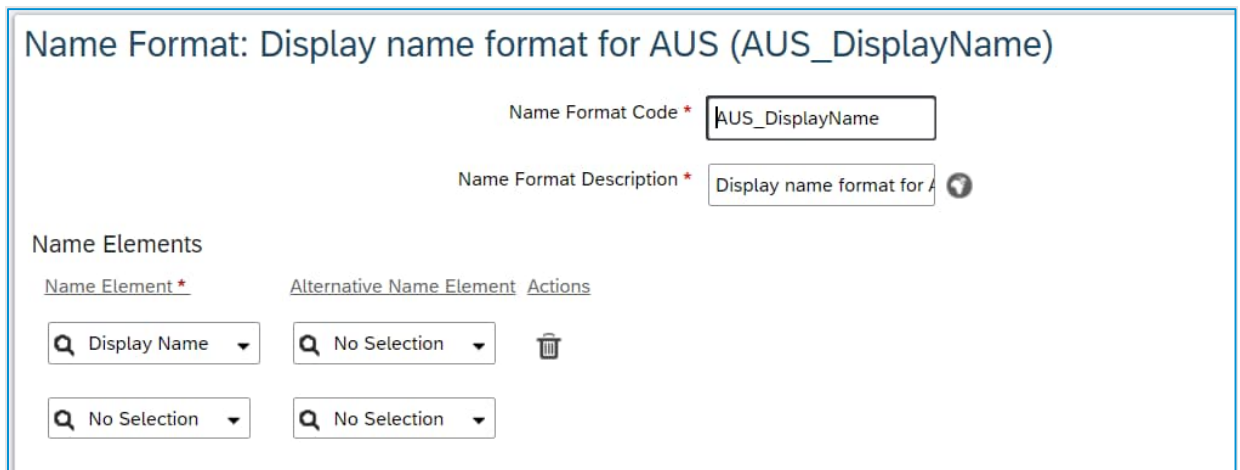
## Task 1.1: Assign the Display Name format to a Legal Entity

**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**

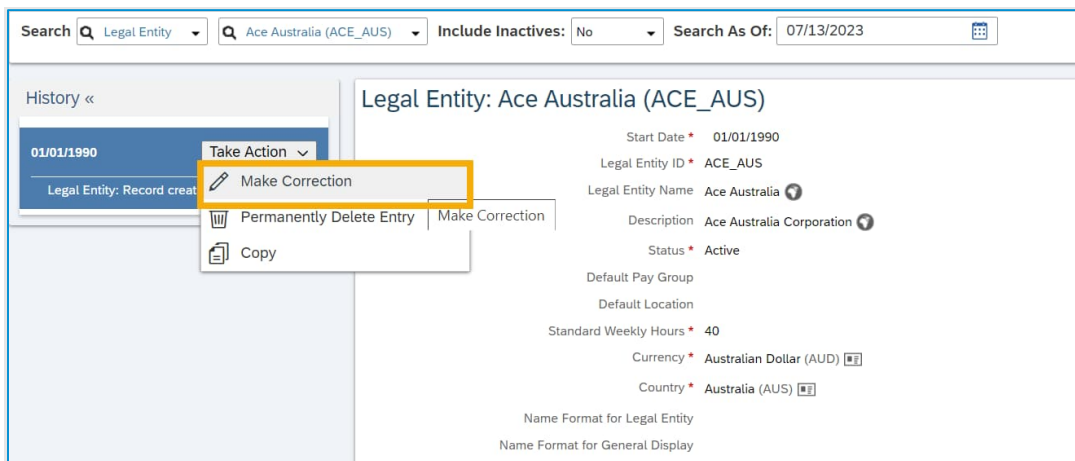


3. Enter **AUS\_DisplayName** in the **Name Format Code** field. Enter **Display Name format for AUS** in the **Name Format Description** field.

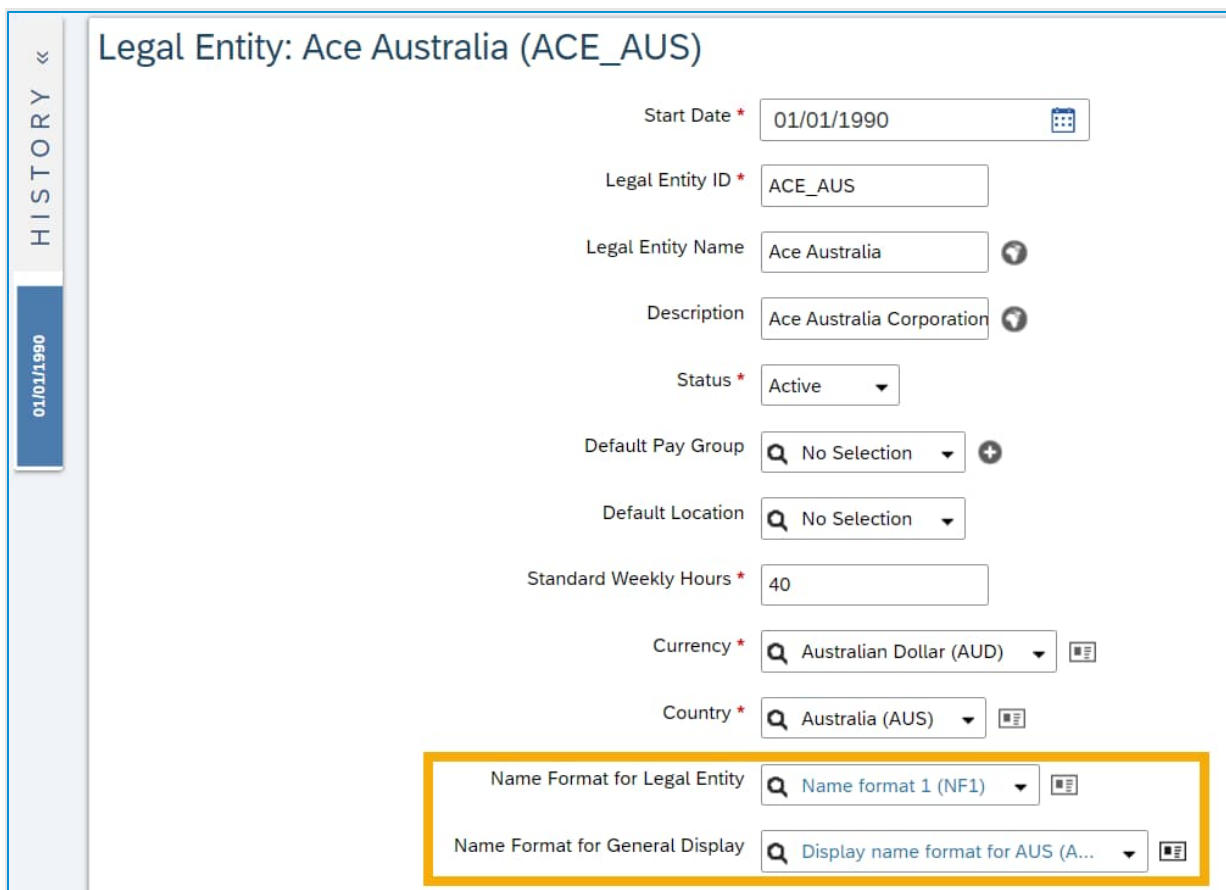


4. The Name Element dropdown has all the name fields that come standard in the Personal Information object. For this lab, select **Display Name** in the dropdown. Leave the Alternate Name Element blank.
5. Select **Save**.
6. Still, in the Manage Data page, choose **Legal Entity** in the first dropdown.

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**.

The screenshot shows the 'Personal Information' tab of an employee profile for Gina Walker. The 'Display Name' field is highlighted with a yellow box and contains the text 'Gigi Walker'. Other fields include 'First Name' (Gina), 'Last Name' (Walker), 'Middle Name' (-), 'Suffix' (-), and 'Format Name' (Gina Walker). The 'Global Information' section shows the Australian flag and the text 'Australia'.

Personal Information	
Effective as of: August 31, 2023	
First Name	Gina
Last Name	Walker
Middle Name	-
Suffix	-
Display Name	Gigi Walker
Format Name	Gina Walker

**Global Information**

Australia

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**.

The screenshot shows the 'Personal Information' tab of an employee profile for Marcus Hoff. The 'Display Name' field is highlighted with a yellow box and contains the text 'Mark Hoff'. Other fields include 'First Name' (Marcus), 'Last Name' (Hoff), 'Middle Name' (-), 'Suffix' (-), and 'Format Name' (Marcus Hoff). The 'Global Information' section shows the United States flag and the text 'United States'.

Personal Information	
Effective as of: August 31, 2023	
First Name	Marcus
Last Name	Hoff
Middle Name	-
Suffix	-
Display Name	Mark Hoff
Format Name	Marcus Hoff

**Global Information**

United States

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.

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\_7a5a329cc5f1e01f0aeb737

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)

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.



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.

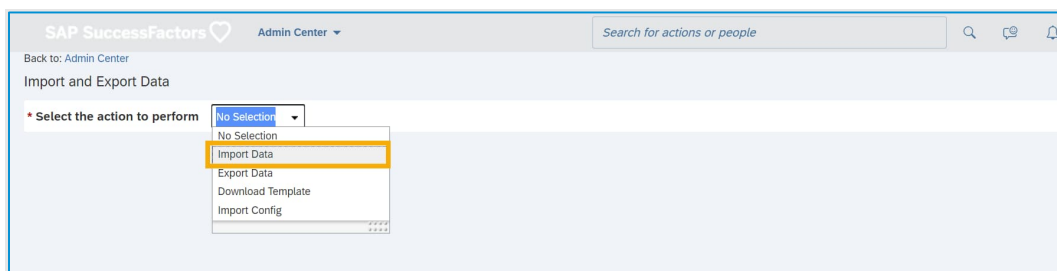
This exercise does not cover how the standard gender field is updated.

**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





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.

\* Select the action to perform Import Data

CSV File ZIP File SuccessStore

\* Select Generic Object Picklist

\* File Choose File Picklist File.csv

File Encoding Unicode (UTF-8)

Purge Type Incremental Load

Suppress Redundant Date-Effective Records Yes

Key Preference Business Key

Use Locale Format No

Identity Type User ID

Date Format MM/DD/YYYY

View Result Validate Import

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.

Admin Center / Scheduled Job Manager

## Scheduled Job Manager

**Job Monitor** Job Scheduler Upcoming Jobs

Job Request ID: Job Name: Job Type: MDF Data Import Status: All Start Date: MMM d, y - MMM d, y Go

Job...	Job Re...	Job Name	Job Type	Status	Start Time (Local Ti...	Progress	Actions
2039	102720	PickList_MDFImp...	MDF Data Import	Completed	Jul 17, 2023, 4:21:17 AM (-04:00)	Job Running Progress: Total:1/Processed:1,Passed:1/Failed:0	<a href="#">View Details</a>

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.

Admin Center / Scheduled Job Manager

## Scheduled Job Manager

**Job Monitor** Job Scheduler Upcoming Jobs

Job Request ID: Job Name: Job Type: All Status: All Start Date: MMM d, y - MMM d, y Go

Job ID	Job Request ID	Job Name	Job Type	Status	Progress	Actions
2040	102721	PickList_MDFImport_Import_2023-07-17	MDF Data Import	Completed	Job Running Progress: Total:1/Processed:1,Passed:1/Failed:0	<a href="#">View Details</a>
2039	102720	PickList_MDFImport_Validate_2023-07-17	MDF Data Import	Completed	Job Running Progress: Total:1/Processed:1,Passed:1/Failed:0	<a href="#">View Details</a>



- 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).

\* Select the action to perform Import Data

CSV File ZIP File SuccessStore

\* Select Generic Object Picklist-Values

\* File Choose File Picklist-Values.csv

File Encoding Unicode (UTF-8)

Purge Type Incremental Load

Suppress Redundant Date-Effective Records Yes

Key Preference Business Key

Use Locale Format No

Identity Type User ID

Date Format MM/DD/YYYY

View Result Validate Import

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

Admin Center / Scheduled Job Manager

### Scheduled Job Manager

Job Monitor Job Scheduler Upcoming Jobs

Job Request ID: Job Name: Job Type: Status: Start Date: Go

Job ID	Job Request ID	Job Name	Job Type	Status	Progress	Actions
2041	102722	PickList_MDFImport_Validate_2023-07-17	MDF Data Import	Completed	Job Running Progress: Total:3/Processed:3,Passed:3/Failed:0	View Details
2040	102721	PickList_MDFImport_Import_2023-07-17	MDF Data Import	Completed	Job Running Progress: Total:1/Processed:1,Passed:1/Failed:0	View Details
2039	102720	PickList_MDFImport_Validate_2023-07-17	MDF Data Import	Completed	Job Running Progress: Total:1/Processed:1,Passed:1/Failed:0	View Details

- 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.

Admin Center / Scheduled Job Manager

### Scheduled Job Manager

Job Monitor Job Scheduler Upcoming Jobs

Job Request ID: Job Name: Job Type: Status: Start Date: Go

Job ID	Job Request ID	Job Name	Job Type	Status	Progress	Actions
2042	102723	PickList_MDFImport_Import_2023-07-17	MDF Data Import	Completed	Job Running Progress: Total:3/Processed:3,Passed:3/Failed:0	View Details
2041	102722	PickList_MDFImport_Validate_2023-07-17	MDF Data Import	Completed	Job Running Progress: Total:3/Processed:3,Passed:3/Failed:0	View Details
2040	102721	PickList_MDFImport_Import_2023-07-17	MDF Data Import	Completed	Job Running Progress: Total:1/Processed:1,Passed:1/Failed:0	View Details
2039	102720	PickList_MDFImport_Validate_2023-07-17	MDF Data Import	Completed	Job Running Progress: Total:1/Processed:1,Passed:1/Failed:0	View Details

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		
<input type="radio"/>	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
<input type="radio"/>	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 Code: gender_USA Parent Picklist: -- Display Order: Alphabetical		Status: Active Effective Start Date: Jan 1, 1900 Legacy Picklist ID: gender_USA	
Picklist Values (3)		Search	
<input type="checkbox"/>	External Code	Label	Status Parent Picklist Value
<input type="checkbox"/>	F	Female 🌐	Active >
<input type="checkbox"/>	M	Male 🌐	Active >
<input type="checkbox"/>	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**.

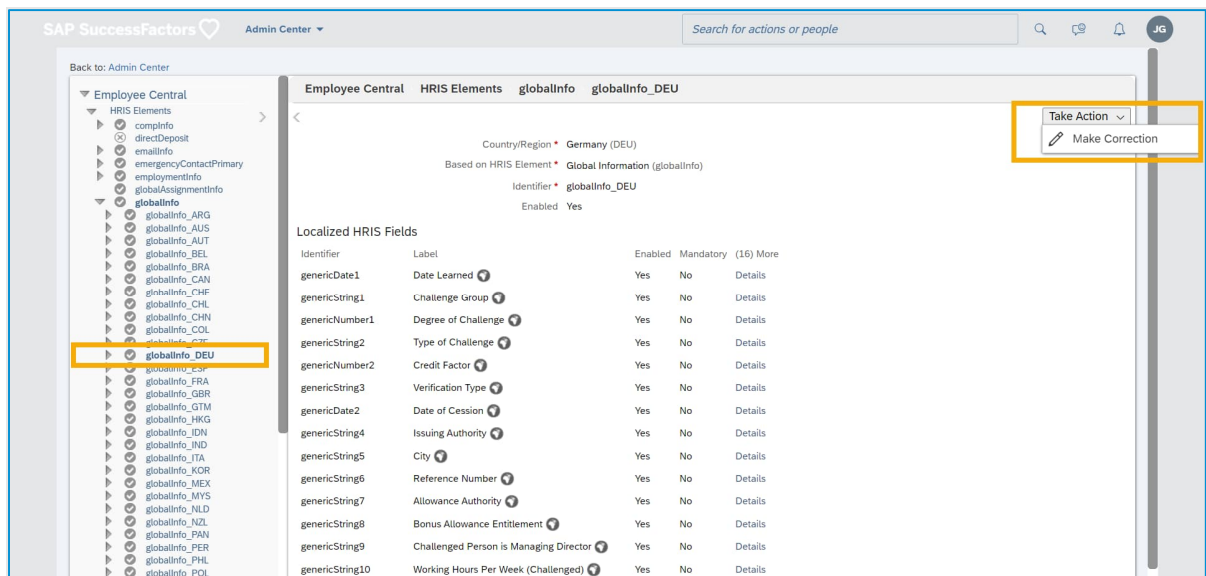
19. You should now have four values in the gender\_USA picklist

gender_USA			
Effective Jan 1, 1900			
Name: gender_USA Code: gender_USA Parent Picklist: -- Display Order: Alphabetical		Status: Active Effective Start Date: Jan 1, 1900 Legacy Picklist ID: gender_USA	
Picklist Values (4)		Search	
<input type="checkbox"/>	External Code	Label	Status Parent Picklist Value
<input type="checkbox"/>	USA-U	Undeclared 🌐	Active >
<input type="checkbox"/>	F	Female 🌐	Active >
<input type="checkbox"/>	M	Male 🌐	Active >
<input type="checkbox"/>	USA-X	Non-Binary 🌐	Active >

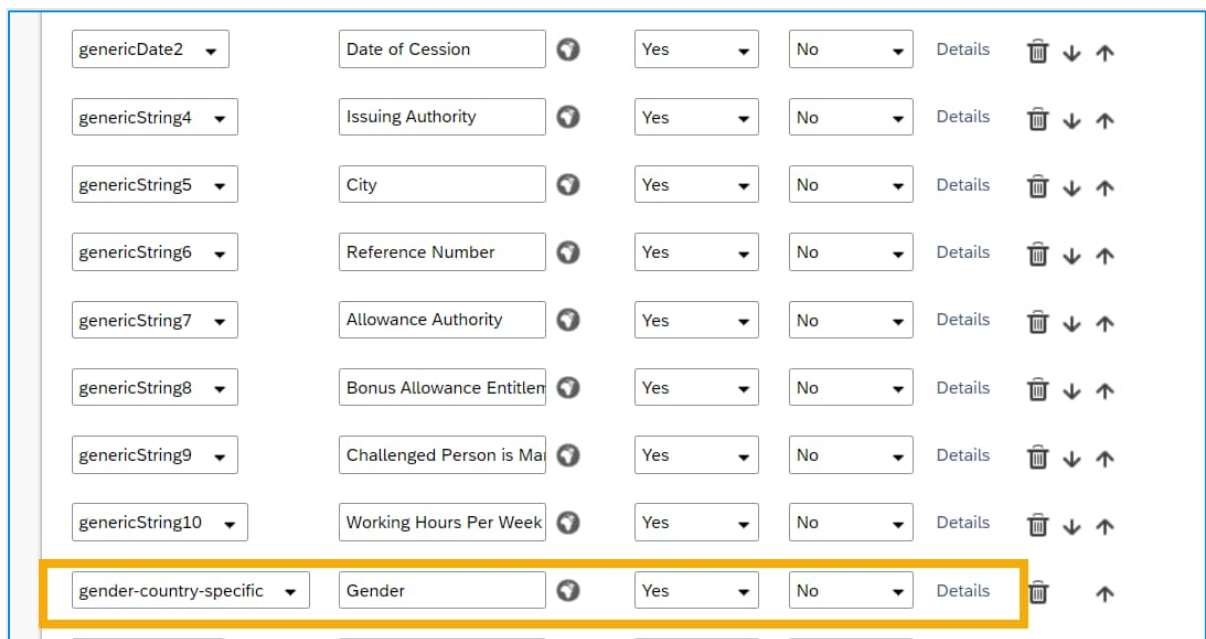
## Task 2.2: Enable the Country-Specific Gender Field in Global Information

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**.

Details

Identifier \*

Label

Enabled

Mandatory

Default Label

Data Type

Type of Reference Object

Reference Object

Picklist

Parent Field for Picklist

Visibility

5. Select **Done**.
6. Select **Save**.
7. Select **Confirm** if a message about max length appears.

Country/Region \*

Based on HRIS Element \*

Identifier \*

Enabled

Localized HRIS Fields

Identifier	Label	Enabled	Mandatory	(16) More
genericDate1	Date Learned	Yes	No	<a href="#">Details</a>
genericString1	Challenge Group	Yes	No	<a href="#">Details</a>
genericNumber1	Degree of Challenge	Yes	No	<a href="#">Details</a>
genericString2	Type of Challenge	Yes	No	<a href="#">Details</a>
genericNumber2	Credit factor	Yes	No	<a href="#">Details</a>
genericString3	Verification Type	Yes	No	<a href="#">Details</a>
genericDate2	Date of Cession	Yes	No	<a href="#">Details</a>
genericString4	Issuing Authority	Yes	No	<a href="#">Details</a>
genericString5	City	Yes	No	<a href="#">Details</a>
genericString6	Reference Number	Yes	No	<a href="#">Details</a>
gender-country-specific	Gender	Yes	No	<a href="#">Details</a>

8. Go to **globalInfo\_USA**

## 9. Select Take Action → Make Correction

The screenshot shows the SAP SuccessFactors Admin Center interface. On the left, the 'Employee Central' navigation menu is expanded, and 'globalInfo\_USA' is selected. The main content area displays the configuration for 'globalInfo\_USA' under the 'HRIS Elements' tab. The 'Country/Region' is set to 'United States (USA)'. The 'Based on HRIS Element' is 'Global Information (globalInfo)'. The 'Identifier' is 'globalInfo\_USA' and it is 'Enabled'. A table of 'Localized HRIS Fields' is shown with columns for Identifier, Label, Enabled, and Mandatory. The 'Take Action' button is highlighted with a yellow box, and the 'Make Correction' option is selected.

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

The screenshot shows the SAP SuccessFactors Admin Center interface. The 'globalInfo\_USA' configuration page is displayed. The table of 'Localized HRIS Fields' is shown with columns for Identifier, Label, Enabled, and Mandatory. The last row of the table is highlighted with a yellow box, showing the field 'gender-country-specific' with the label 'Gender' and 'Yes' selected in the Enabled column.

Identifier	Label	Enabled	Mandatory	(16) More
genericString1	Ethnic Group	Yes	No	Details
genericNumber1	Veteran	Yes	No	Details
genericNumber2	Challenged Veteran	Yes	No	Details
genericNumber3	Other Protected Veteran	Yes	No	Details
genericNumber4	Armed Forces Medal Veteran	Yes	No	Details
genericNumber5	Recently Separated Veteran	Yes	No	Details
genericNumber6	Special Disabled Veteran	Yes	No	Details
genericNumber7	Vietnam Era Veteran	Yes	No	Details
genericNumber8	Other Disabled Veteran	Yes	No	Details
genericNumber9	Visa Type	Yes	No	Details
genericString2	Challenge Group	Yes	No	Details
genericNumber10	Degree of Challenge	Yes	No	Details
genericString3	Type of Challenge	Yes	No	Details
genericDate1	Date Learned	Yes	No	Details
genericString4	Issuing Authority	Yes	No	Details
genericString5	Reference Number	Yes	No	Details
genericNumber12	Status Given in Form CC-305	Yes	No	Details
genericDate5	Submission Date of Form CC-305	Yes	No	Details
genericString6	Challenged	Yes	No	Details
genericDate2	Date of Determination of Challenge Status	Yes	No	Details
genericString9	Smoker	Yes	No	Details
genericString10	On Military Service	Yes	No	Details
genericString11	Financially Independent	Yes	No	Details
genericString12	Physician Name	Yes	No	Details
genericNumber11	Physician ID Number	Yes	No	Details
genericDate4	Date Of Providing Proof C	Yes	No	Details
genericDate3	Date of Separation from	Yes	No	Details
gender-country-specific	Gender	Yes	No	Details

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**.

Details

Identifier \*

Label

Enabled

Mandatory

Default Label

Data Type

Type of Reference Object

Reference Object

Picklist

Parent Field for Picklist

Visibility

12. Select **Done**.
13. Select **Save**.
14. Select **Confirm** if a message about max length appears.

Country/Region \*

Based on HRIS Element \*

Identifier \*

Enabled

Localized HRIS Fields

Identifier	Label	Enabled	Mandatory	(16) More
genericString1	Ethnic Group	Yes	No	<a href="#">Details</a>
genericNumber1	Veteran	Yes	No	<a href="#">Details</a>
genericNumber2	Disabled Veteran	No	No	<a href="#">Details</a>
genericNumber3	Other Protected Veteran	Yes	No	<a href="#">Details</a>
genericNumber4	Armed Forces Medal Veteran	Yes	No	<a href="#">Details</a>
genericNumber5	Recently Separated Veteran	Yes	No	<a href="#">Details</a>
genericNumber6	Special Disabled Veteran	Yes	No	<a href="#">Details</a>
genericNumber7	Vietnam Era Veteran	Yes	No	<a href="#">Details</a>
genericNumber8	Other Disabled Veteran	Yes	No	<a href="#">Details</a>
genericNumber9	Visa Type	Yes	No	<a href="#">Details</a>
gender-country-specific	Gender	Yes	No	<a href="#">Details</a>

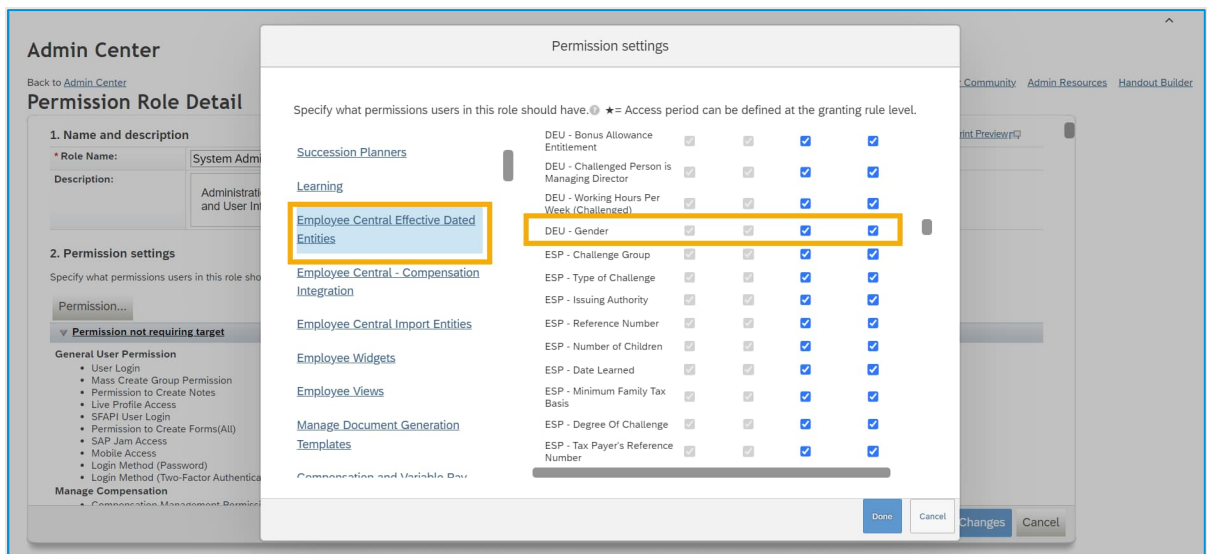
## Task 2.3: Set the Field Permissions

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

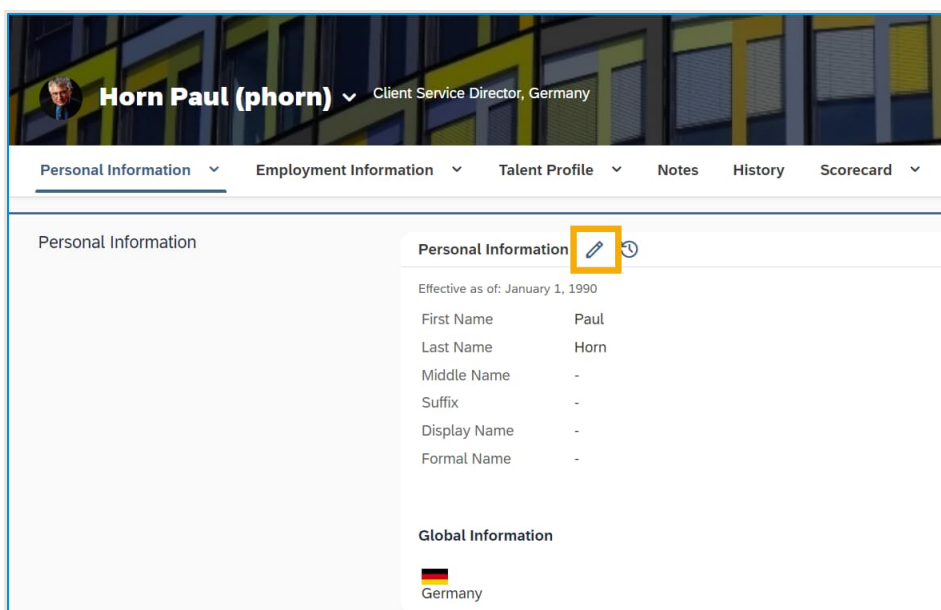


**Note:** Full administration permissions must be limited to an admin group; the role used in this lab is assigned to everyone for expediency and is not indicative of best practices.

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**





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.

SAP SuccessFactors My Employee File

Search for actions or people

Personal Information

Global Information

Country/Region \*  
Germany

Date Learned  
Jan 01, 2000

Working Hours Per Week (Challenged)

Gender  
No Selection  
Female  
Male  
Non-Binary  
Undeclared

Save Cancel

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**.

SAP SuccessFactors My Employee File

Search for actions or people

Personal Information

When would you like your changes to take effect? \*  
Jul 17, 2023

Personal Information

First Name \*  
Wilma

Last Name \*  
Sown

Middle Name

Suffix  
No Selection

Display Name

Formal Name

Title

Birth Name

Initials

Prefix

Show 10 more fields

Name in Alternate Language 1  
Add Global Information

Save Cancel

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.

The screenshot shows the 'Personal Information' block in an SAP interface. The block contains several input fields: 'Date Learned' with a date picker icon, 'Issuing Authority', 'Reference Number', and a 'Gender' dropdown menu. The 'Gender' dropdown is open, showing four options: 'No Selection' (highlighted in blue), 'Female', 'Male', and 'Undeclared'. Below the dropdown is a 'No Selection' button and a downward arrow. The block is titled 'Personal Information' and has an 'Add Global Information' button at the bottom.

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**

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

Create a New Picklist

Code: *	PersonPronouns
Name:	Person Pronouns
Status:	Active
Effective Start Date:	Jan 1, 1900
Display Order:	Alphabetical
Parent Picklist:	
Legacy Picklist ID:	

**Save** **Cancel**

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

PersonPronouns  
Effective Jan 1, 1900

Name:	Person Pronouns	Status:	Active
Code:	PersonPronouns	Effective Start Date:	Jan 1, 1900
Parent Picklist:	—	Legacy Picklist ID:	PersonPronouns
Display Order:	Alphabetical		

Picklist Values (3)

<input type="checkbox"/>	External Code	Label	Status	Parent Picklist Value
<input type="checkbox"/>	she/her	she/her	Active	
<input type="checkbox"/>	he/him	he/him	Active	
<input type="checkbox"/>	they/them	they/them	Active	

## 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**

Employee Central

Employee Profile

View Template

Background Elements

Standard

addressLine1

matrixManager

meritEffectiveDate

meritTarget

mi

minority

multiBonusExtra

nationality

newToPosition

nickname

objective

on-leave-status

payGrade

performance

personalCombinedStatement

personalCompensationSt...

personalVarPayStatement

photo

potential

previousEmployer

previousPosition

promotionAmount

pronouns

proxy

raiseProrating

reasonForLeaving

retirementDate

Employee Profile Standard pronouns

Identifier \* pronouns

Label Pronouns

Default Label Pronouns

Enabled No

Maximum Length 0

Picklist No Selection

Parent Field for Picklist

Mandatory No

Masked No

Log Read Access No Selection ?

Take Action

Make Correction

Updated by Jay Garcia(adminjay) on Monday, July 17, 2023 5:20:35 AM EDT

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

Employee Profile Standard pronouns

Identifier \* pronouns

Label Pronouns

Default Label Pronouns

Enabled Yes

Maximum Length 0

Picklist PersonPronouns

Parent Field for Picklist No Selection

Mandatory No

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**

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

**Permission Role List**

Different users should have different access to the information in the application. A role controls the access rights a user (or a group) has to the application or employee data. Each role has its own set of access permissions that you define. You can also limit exactly what a group can access.

Type role name...

[Switch to the Latest Role-Based Permissions](#)

Create New Create New Role for External User

Items per page 10 << < Page 1 of 4 > >>

ID	Permission Role	User Type	Description	Status	RBP-Only	Created From	Last Modified	Action
2	System Admin		Administration of System Behaviors and User Info	ACTIVE	<input type="checkbox"/>		2023-07-12	Take action

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

**Permission Role Detail**

1. Name and description

Role Name: System Admin

Description: Administration of System Behaviors and User Info

2. Permission settings

Specify what permissions users in this role should have. ⚙️ ★= Access period can be defined at the granting rule level.

Permission...

▼ Permission not requiring target

General User Permission

- User Login
- Mass Create Group Permission
- Permission to Create Notes
- Live Profile Access
- SFAPI User Login
- Permission to Create Forms(All)
- SAP Jam Access
- Mobile Access
- Login Method (Password)
- Login Method (Two-Factor Authentication)

Manage Compensation

- Compensation Management Permission
- Manage Salary Pay Matrices
- Manage Currency Conversion Rate Tables
- Manage Stock Value Tables
- Manage Stock Factors Tables
- Manage Families And Groups
- Manage Merit Matrices
- Manage Job Code and Pay Grade Matrices
- Generate Compensation Hierarchy

Employee Data

Permission settings

Specify what permissions users in this role should have. ⚙️ ★= Access period can be defined at the granting rule level.

Manage Document Generation	New to Position	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Templates	Nickname	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Compensation and Variable Pay	Objective	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payroll Permissions	On Leave Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recruiting Permissions	Pay Grade	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports Permission	Performance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics permissions	Photo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee Data	Potential	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General User Permission	Promotion	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAP System Configuration	Pronouns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payroll Integration Permission	Protected Vet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Proxy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Raise Prorating	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Reason for Leaving	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Retirement Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Done Cancel

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.

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

Configure People Profile

English US (English US)

**General Settings**

**Personal Information**

National ID ... National ID Information Place block here

Address Inf... Address Information Place block here

Personal In... Personal Information

Biographic... Biographical Information

**General Settings**

**Header Settings**

Configure Header Fields

☒ Allow employees to edit background image

☐ Disable background image uploading by employees

Manage background image library

☐ Allow employees to upload an audio file for name pronunciation

Read My Name Agreement

☐ Allow employees to upload an About Me video

Read About Me Agreement

☒ Allow employees to enter introductory text

☐ Allow employees to maintain their pronouns

☒ Show percent complete

☐ Set all fields as expanded by default

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**.

SAP SuccessFactors My Employee File

Search for actions or people

Actions Header As of Today

Edit Profile Picture Header

Edit Background Image

About Me

My Name

**About Me**

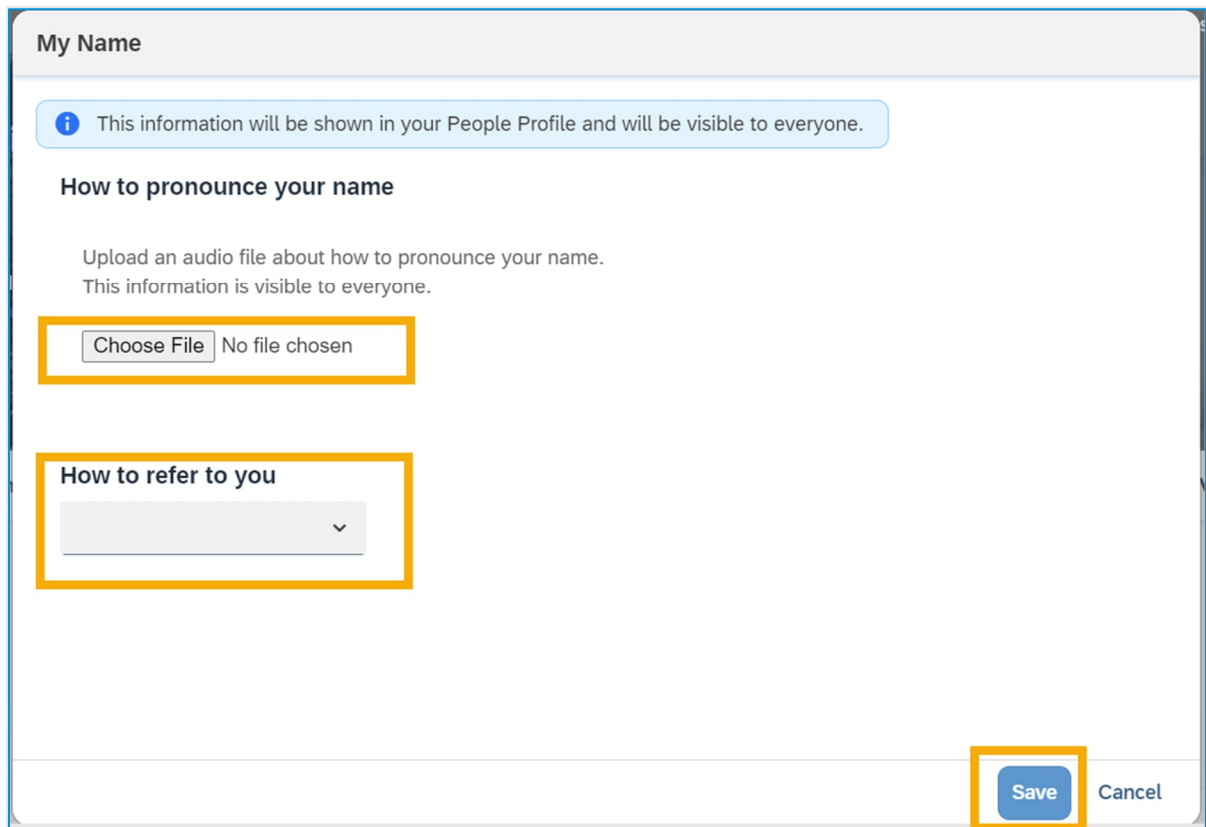
Upload a video to introduce yourself to your colleagues. This information is visible to everyone.

No file chosen

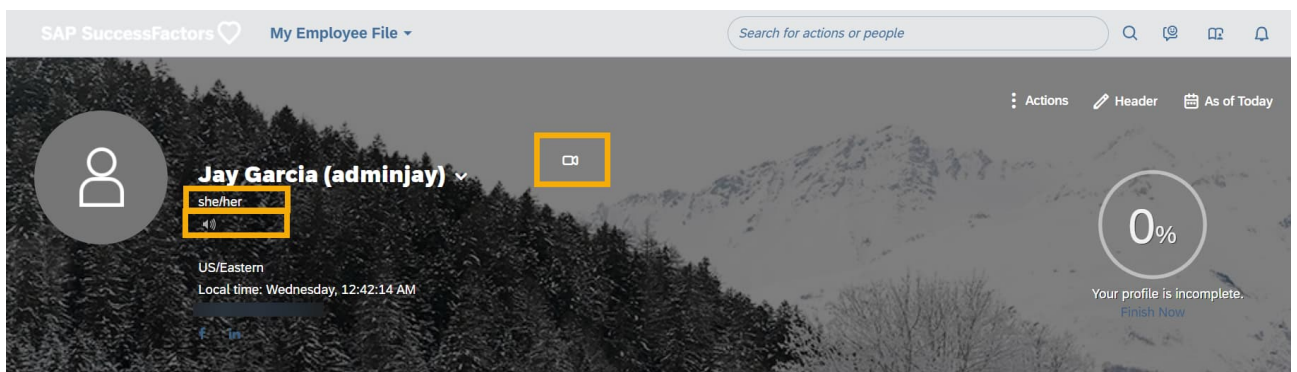
Say something about yourself. This information is visible to everyone.

Your profile is incomplete. Finish Now

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.