

SuccessFactors Best Practices

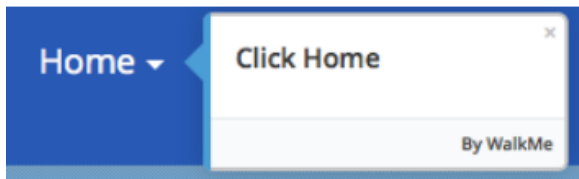
SuccessFactor's expansive portal offers a fully customizable and role-based interface. The intricacy and scope of the software impose restrictions on usage and require certain structures for productive Walk-Thrus.

Walk-Thru Structure

All Walk-Thrus on SuccessFactors should begin by making sure the user is in the correct Module.

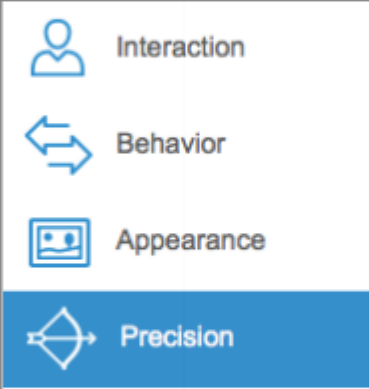
To confirm that the user is on the correct Module, add the following steps to the beginning of all SuccessFactor Walk-Thrus:

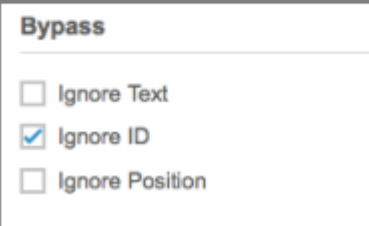
1. Add a step and select the Main Navigation Menu as your element. In the title write, "Click to Open the Menu." Make sure the Click trigger is selected. Open the Precision tab in the Step Options Menu and use Ignore ID.



How to Ignore ID

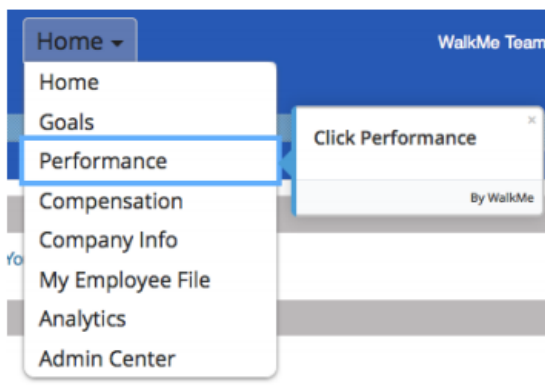
To ignore ID within a step, enter the Step Options Menu:

1. Click on Precision
 

The screenshot shows a menu with four options: Interaction (person icon), Behavior (double arrows icon), Appearance (picture icon), and Precision (target icon). The Precision option is highlighted with a blue background.
2. Select Ignore ID
 

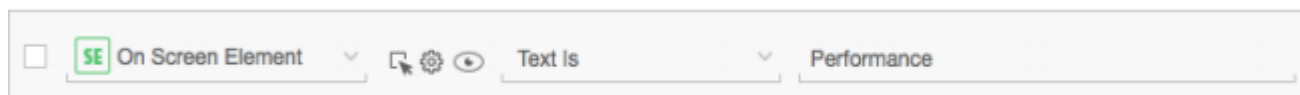
The screenshot shows a 'Bypass' menu with three options: Ignore Text (unchecked), Ignore ID (checked), and Ignore Position (unchecked).

2. Add a second step and select the Module dropdown menu as your element. In the title text, write "Click Here." Make sure the Click trigger is selected. Open the Precision tab in the Step Options Menu and use Ignore ID.



In order to avoid repeating steps if the user is already in the correct Module, use a Start Point

1. Create a new step
2. Make it a Start Point by hovering over the step and clicking on the three dots and choosing "Add Start Point"
3. Add a Rule so that the Start Point to occurs only if the correct Module is listed in the Main Navigation. For example: On Screen Element - Text Is - "..."

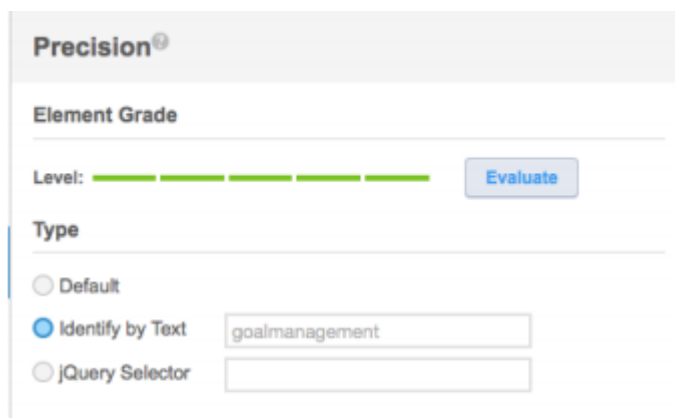
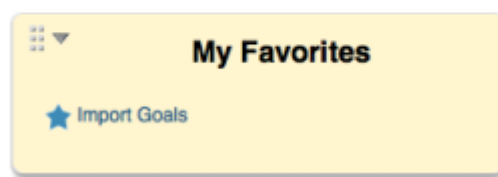


Admin Center

Finding Elements

When creating Walk-Thrus in the Admin Center in SuccessFactors, most elements within the Company Process & Cycles Menu need to be identified by their text to work.

1. Click on the step to open Step Options
2. Go to Precision
3. Select the "Identify by Text" radio button

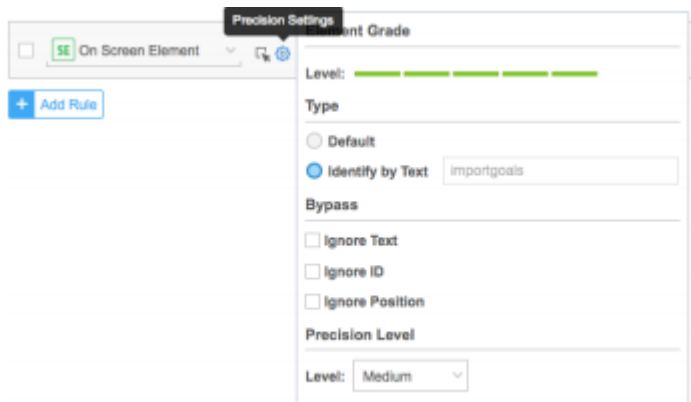



Using Shortcuts

Some items in the Admin Center can be favorited and placed in a sidebar for one-click access.

Even if an item is favorited, the user may be asked to go through the menu and complete an additional step. To avoid redundancy, use a Step Play Rule on the step that opens the dropdown. In order to avoid repeating steps if the user is already in the correct Module, use a Start Point

1. Click on the step to open Step Options
2. Go to Behavior
3. Click Create a Step Play Rule
4. Add a Rule so that the Step Plays only if the favorited item is not visible. Use On Screen Element Is Visible.
5. Click the Gear to open Precision settings for the Rule and select Identify by Text.



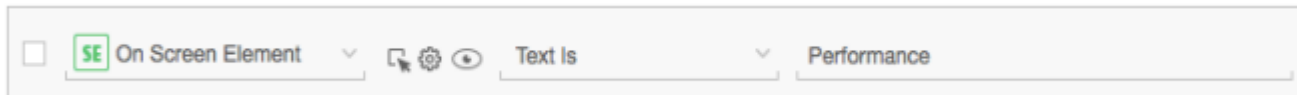
Segmentation

By Module

Due to the extensive range of actions that can be completed within SuccessFactors, you may create so many Walk-Thrus that your WalkMe Player Menu becomes cluttered and hard to navigate. If so, we recommend using the Segmentation Center to ensure that users only see Walk-Thrus in relevant Modules. To make menu items appear only when the user is in a specific Module, define the Segment:

1. Click the Segmentation Center
2. Add a New Segment
3. Enter a name and select a color
4. Hover over your step and click the Define Segment button
5. Add a Rule so that items only appear if the correct Module is listed in the Main Navigation.

For example: On Screen Element - Text Is - "..."



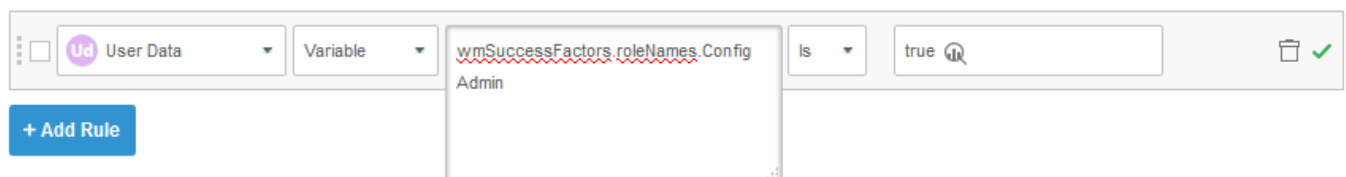
By Variable

Upon request, WalkMe can enable a feature that allows you to use SuccessFactors variables such as Role Name, Role ID, and User Language in the Rule Engine. This means that you can make specific menu items appear only to certain user groups in SuccessFactors depending on their role (either by name, ID, or language). To create a Segment with these variables use the following steps:

1. Click Segmentation Center
2. Add a New Segment
3. Enter a name and color
4. Click on Segment Name
5. Click "Define this Segment"
6. Create a rule that with one of the following variables:
 - `wmSuccessFactors.roleNames.enterRoleNameHere`
 - `wmSuccessFactors.roleIDs.enterRoleIdHere`
 - `wmSuccessFactors.defaultLocale.enterLanguageHere`

For Example:

User Data - Variable-`wmSuccessFactors.roleNames.Config Admin`- is- true



User Data- Variable- `wmSuccessFactors.roleIDs.713`-is-true

Ud User Data

Variable

wmSuccessFactors.roleids.713

is

true

✓

+ Add Rule