SAP SuccessFactors ♡

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Managing User License Compliance

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Content

1 SAP SuccessFactors License Compliance Module Details

To help you better manage your SAP SuccessFactors licenses effectively, this topic provides information about license usage metric, usage measurement, ways to check current license usage, ways to reduce user count by deactivating users, and ways to reduce user count by deactivating module content. Please note that each license is measured against a product bundle, but to help you better manage user counts of each module, we list all modules separately in the table below. For example, Performance Management, Goal Management, 360 Reviews, and Continuous Performance Management all belong to the SAP SuccessFactors Performance and Goals bundle.

> ⓘ **Note**
>
> The intent of the document is to help you better manage your SAP SuccessFactors licenses effectively **after** you purchased the licenses. Please **do not** use this document as the guidance on making license purchasing decisions. To know more about SAP SuccessFactors product specifications, see Cloud Service Specifications🔗.

SAP SuccessFactors License Compliance

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Performance Management	Authorized User	Total number of Authorized Users who have an active status in the system and who have had an active performance form assigned. This number represents the total number of active profiles or status. *Active Users* under customer's *Performance Manager Summary*	You can create a Table report to check the current usage. Follow the steps on page 5 to page 14 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Performance & Goals 🔗	Setting User Status to Inactive Field Requirements for the User Data File 2088200🔗	Deleting Forms

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Goal Management	Authorized User	Total number of Authorized Users who have an active status in the system and who have had an active goal plan assigned. This number represents the total number of active profiles or status. *Active Users* under *Goal Management Summary*.	You can create a Table report to check the current usage. Follow the steps on page 16 to page 25 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Performance & Goals	Setting User Status to Inactive Field Requirements for the User Data File 2088200	Goal plan templates cannot be deleted, but they can be purged. You can refer to this document to know more about data purge functions: Data Retention Management You can bulk delete goal plans by following steps listed in this KBA: 2071929
360 Reviews	Authorized User	Total number of Authorized Users who have an active status in the system and who have been the subject of a 360 review. This number represents the total number of active profiles or status. *Active Users* under *360 Feedback Summary*.	You can create a Table report to check the current usage. Follow the steps on page 26 to page 36 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Performance & Goals	Setting User Status to Inactive Field Requirements for the User Data File 2088200	
Career Development Management	Authorized User	Total number of Authorized Users who have an active status in the system and who have had an active development goal assigned to them. This number represents the total number of active profiles or status. *Active Users* under customer's *Career Development Planning Summary*.	You can create a Table report to check the current usage. Follow the steps on page 17 to page 26 of this document: SAP Global License Auditing Services - SAP SuccessFactors Succession & Development	Setting User Status to Inactive Field Requirements for the User Data File 2088200	Data Retention Management 2071929

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Succession Management	Authorized User	Succession Solution - Succession Nominee User ID Total number of Authorized Users with an active status in the system and have been nominated as successors. "Active Users" nominated as successors.	You can create a Table report to check the current usage. Follow the steps on page 4 to page 15 of this document: SAP Global License Auditing Services - SAP SuccessFactors Succession & Development	Setting User Status to Inactive Field Requirements for the User Data File 2088200	Editing or Deleting MDF Positions Managing Talent Pool Nominations Editing or Reviewing Successor Nominations
Calibration	Authorized User	Total number of Authorized Users who have an active status in the system and who are using Calibration.	You can create a Table report to check the current usage: SAP Global License Audit & Compliance - SAP SuccessFactors Performance & Goals	Setting User Status to Inactive Field Requirements for the User Data File 2088200	Deleting Calibration Sessions
Opportunity Marketplace	Authorized User	Total number of Authorized Users who have an active status in the system and who are using Opportunity Marketplace.		Setting User Status to Inactive Field Requirements for the User Data File 2088200	
Compensation Management	Authorized User	Total number of Authorized Users who have an active status in the system and have been included in an active compensation planning form. This number represents the total number of active profiles or status. *Active Users* under customer's *Compensation Summary*.	You can create a Table report to check the current usage. Follow the steps on page 5 to page 13 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Compensation	Setting User Status to Inactive Field Requirements for the User Data File 2088200	Deleting Compensation Worksheet Adding, Moving, and Deleting Employees

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Variable Pay	Authorized User	Total number of Authorized Users who have an active status in the system and have been included in an active variable pay planning form. This number represents the total number of active profiles or status. *Active Users* under customer's *Variable Pay Summary*.	You can create a Table report to check the current usage. Follow the steps on page 15 to page 23 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Compensation	Setting User Status to Inactive Field Requirements for the User Data File 2088200	Deleting or Exporting Variable Pay Worksheets
Rewards and Recognition	Authorized User	Total number of employees eligible for all active Spot Award Programs. Target population of employees eligible for a milestone award. Target population of employees that can grant an award.	You can create a report to get to current number of users. Follow the steps in Accessing License Usage Data for Compensation, Variable Pay, and Rewards and Recognition to get to the number of users for the Compensation product.	Setting User Status to Inactive Field Requirements for the User Data File For spot awards refer to Creating Spot Award Program Settings For Milestone awards refer to Creating Milestone Award Programs For employees who can grant an award, refer to the permission roles with *Spot Award* permission.	

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Recruiting Management	User	Total number of Individuals who have an active status in the system. This number represents the total number of users with active profiles or status. ⓘ **Note** If you have an Active Subscription for Employee Central Functional User and/or Learning Functional User, your User Count will be the total number of Users with active status in the system, excluding the sum of active Functional Users of Employee Central and Learning Functional user profiles.	You can create a Table report to check the current usage. Follow the steps on page 5 to page 11 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Recruiting		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Recruiting Marketing	User	Total number of Individuals who have an active status in the system. This number represents the total number of users with active profiles or status. ⓘ **Note** If you have an Active Subscription for Employee Central Functional User and/or Learning Functional User, your User Count will be the total number of Users with active status in the system, excluding the sum of active Functional Users of Employee Central and Learning Functional user profiles.	You can create a Table report to check the current usage. Follow the steps on page 5 to page 11 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Recruiting📌		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Onboarding	User	Total number of Individuals who have an active status in the system. This number represents the total number of users with active profiles or status. ⓘ **Note** If you have Active Subscription for Employee Central Functional User and/or Learning Functional User profile, your User Count will be the total number of Users with active status in the system, excluding the sum of active Functional User of Employee Central and Learning Functional user profiles.	You can create a Table report to check the current usage. Follow the steps on page 5 to page 11 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Onboarding		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Workforce Planning	User	Total number of Individuals who have an active status in the system. This number represents the total number of users with active profiles or status. ⓘ **Note** If you have an Active Subscription for Employee Central Functional User and/or Learning Functional User, your User Count will be the total number of Users with active status in the system, excluding the sum of active Functional Users of Employee Central and Learning Functional User Profiles.	You can create a Table report to check the current usage. Follow the steps on page 4 to page 11 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Workforce Planning and Analytics		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Workforce Analytics	User	Total number of Individuals who have an active status in the system. This number represents the total number of users with active profiles or status. ⓘ Note If you have an Active Subscription for Employee Central Functional User and/or Learning Functional User, your User Count will be the total number of Users with active status in the system, excluding the sum of active Functional Users of Employee Central and Learning Functional User Profiles.	You can create a Table report to check the current usage. Follow the steps on page 4 to page 11 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Workforce Planning and Analytics		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Employee Central Payroll	Authorized User	Employees with active payroll results at a certain key date. Employees and business partners whose information is stored in ECP and who have an active profile or status against which transactions are processed. The system determines all employees in the system who have a payroll result on the first day of the month, which is 2 months before the current date. e.g. If current date is May 14, 2022, the calculation is done for key date March 1, 2022.	You can call transaction SE37 in Employee Central Payroll system. Follow the steps on page 4 to page 6 of this document: SAP Global License Auditing Services - SAP SuccessFactors Employee Central Payroll		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Employee Central - Full Use	Authorized Active User Profiles	Total number of Authorized Users is the count of Authorized Users with an active profile and with active employment information stored in Employee Central. This number represents the total number of active profiles or status. A single active user with multiple contracts or roles having concurrent employment or global assignments shall be counted as one user. *Active Users* under the customer's *User and Employee Info*.	You can create a Table report to check the current usage. Follow the steps on page 5 to page 14 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Employee Central - Full Use		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Employee Central - Functional Use	Active Functional User	Total number of Active Functional Users is the count of employees or individuals stored in Employee Central reflecting an active employment relationship or an ongoing pensioner status with the legal entity of the employer at the time of auditing. The term "active" in the "Active Functional User" refers not to the login user status (if the user can log in or not) but rather if the data of the employment or person of the "user" is being actively used. For example: an active employment mastered in an external HRIS System and (constantly) replicated to Employee Central, or an active pensioner relationship with the company (former employee receives a pension although their employment relationship is already inactive). • User is contingent or con-	You can create a Table report to check the current usage. Follow the steps on page 6 to page 15 of this document: SAP Global License Audit & Compliance - SAP SuccessFactors Employee Central - Functional Use		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
		tractor worker (non-employees).			
		• User has an active pensioner relationship with the company (is paid a pension or equivalent by the company, or their personal data and claims need to be still updated (after employment termination) for the purpose of outsourcing the execution of pensions, similar claims, or payments post termination).			
		• User/individuals for which Employee Central is not the system of record for their corresponding HR masterdata, rather the HR masterdata is recorded in SAP ERP HCM or any other core HR System.			
		• Individuals with a limited or temporary employee relationship during the course of a year or 12-month period			

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
		(Seasonal Employees).			
		• User is recorded and kept in the Employee Central, but the user isn't given access to the system.			
		A single active individual/person with multiple active contracts or roles (users) that have concurrent employment or global assignment shall be counted as one user.			

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Learning	Active User	Total number of users who have an active status AND are NOT identified as a Functional User in the LMS system AND meet at least one of the following three usage criteria: • User has a learning history record for an internal or external course OR • User has enrolled in a course and that course is on the user's learning plan OR • User has launched a course AND that course is on the user's learning plan. This number represents the total number of active profiles or status. *Number of Active Users Using Learning as of* under customer's report *LMS Usage Metrics*.	You can create an LMS Usage report to check the current usage. Follow the steps on page 6 to page 8 of this document: SAP Global License Auditing Services - SAP SuccessFactors Learning		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
	Active Functional User	Total number of users who have an active status AND are identified as a Functional User* in the LMS system, AND meet at least one of the following three usage criteria: • User has a learning history record for an internal or external course OR • User has enrolled in a course and that course is on the user's learning plan OR • User has launched a course AND that course is on the user's learning plan. This number represents the total number of functional use profiles or status. *Number of Functional Users Using Learning as of* under customer's report *LMS Usage Metrics*.			

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
	Learning Analytics	The number of users in the sum of Active Users and Active Functional Users as defined above. *Number of Active Users Using Learning as of* plus the *Number of Functional Users Using Learning as of* under customer's report *LMS Usage Metrics*.			

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Workforce Planning and Analytics	User	Total number of Individuals who have an active status in the system. This number represents the total number of users with active profiles or status. ⓘ **Note** If you have an Active Subscription for Employee Central Functional User and/or Learning Functional User, your User Count will be the total number of Users with active status in the system, excluding the sum of active Functional Users of Employee Central and Learning Functional User Profiles.	You can create a Table report to check the current usage. Follow the steps on page 4 to page 10 of this document: SAP Global License Audit & Compliance – SAP SuccessFactors Workforce Planning and Analytics		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
Time Tracking	SAP SuccessFactors Employee Central users with active status in the system who are authorized to use SAP SuccessFactors Time Tracking features.	Total number of Authorized Employee Central Users who have an active status and active employment status in the system and who have been granted permissions to use Time Tracking features. This number represents the total number of active profiles or status.	There're two options to review usage in the system: • Check Tool Check Overview: To get a holistic overview there's a dedicated Check Tool check provided in the system that allows customers to see the absolute count of Time Tracking users, broken down by Legal Entity. Note, if you are running multiple productive tenant instances , you need to run the check tool and the report in each one, and then add the totals for each of them to calculate the aggregated total number of users. • Detailed report by feature: To get a detailed understanding per Time Tracking feature, there's a dedicated Time Tracking report provided which shows the user count per feature, including		

Modules	Usage Metric	Usage Measurement	Check Current Usage	Reduce User Count by Deactivating Users	Reduce User Count by Deactivating Module Content
			additional information on those users. Follow the steps on page 5 to page 9 of this document: SAP SuccessFactors Time Tracking. More details about Time Tracking user analysis, see Time Tracking User Analysis.		

2 How User Types Affect Compliance

SAP SuccessFactors licenses consider the types of users in your system, so categorizing your users into the right type helps you stay in compliance with the licensing structure.

When a customer signs a contract to use SAP SuccessFactors software, they must set the number of users for the system.

These users can either be internal or external employees. Classifying these users as full or functional is based on the license agreement that the customer currently has. For example, if a customer has both full and functional license, then for auditing purposes, we will compare all active users with non-functional categories to the number of full users license that have been purchased and compare all active users with functional categories to the number of functional users license purchased by the customer.

In cases where a customer only has full license, then all internal or external users with active profiles in the system will be compared to full license purchased by the customer.

If the total number of users is more than the authorized number of users, that means that the customer is non-compliant with their contract.

This guide will help you understand the different user types, so that you can classify them correctly and then measure their usage in your instance to remain compliant with SAP SuccessFactors.

3   User Types in Employee Central

Since there is no direct flag in Employee Central to mark users as full or functional, customers need to correctly classify users in their instance.

For auditing purposes, users are measured as individuals with an active profile and active employment in the system. Users with an inactive profile or without active employment in the system are not counted for compliance measuring. Here, active employment means having an employment status of either Active, Paid Leave, Unpaid Leave, or Suspended.

> ⓘ **Note**
>
> Full vs Functional User comparison using the user type is only done if the customer is entitled (has active contract) for Employee Central Functional User licenses, otherwise all users are counted as full users.

Full User	Functional User
• Active employment in Employee Central • Employee Central is the system of record	• Non-employee (including contingent workers/contractors) Contingent worker flag set to Yes in Employee Central • User has an active pensioner relationship with the company (is paid a pension or equivalent by the company, or their personal data and claims need to be updated (after employment termination) for the purpose of outsourcing the execution of pensions, similar claims, or payments post termination). • Employee Central is not the system of record • Employee Central is the system of record, but employee does not have access to the system • Seasonal workers

> ⓘ **Note**
>
> Seasonal workers are people with a limited or temporary contract, where the time between Hire/Rehire and Termination events in the system is 12 months or less.

> ⓘ **Note**
>
> When loading employee records from other systems or through imports, make sure that the criteria for a full vs. functional user is also reflected in your data. For example, when you import Contingent Workers, set the *Is_Contingent_Worker* flag to *Yes*. For example, when importing employees from an SAP ERP HCM system, set the SourceOfRecord field with the picklist entry from the SourceOfRecord picklist. More information about this picklist is found in the **Additional Notes for Employees Recorded Outside of Employee Central** section.

Example: When to Use Functional User Classification?

A customer has both Full (User Quantity: 10,000) and Functional User License (User Quantity: 5,000). Here are some scenarios on how they have to classify their users as functional.

1. They have external workers that they want to manage within Employee Central. In such a scenario, the customer has to set the flag for IS_CONTINGENT_WORKER in Employment Information.
2. For former employees (or beneficiaries of former employees) for whom the master data records (address, bank account, name, identification, and so on) need to be stored and kept up-to-date so that the company (customer) can pay out a pension using their own payroll system or using an external insurance company. During the actual payout period, a functional license is needed for this record and the customer must use the Employee status field in Job Information with the value Retired to properly identify these records. Once the pension claim period is over (for example, due to death of the former employee), the employee status in Job Information must be changed from Retired to Terminated so that a functional license is no longer needed.
3. For any users that have SAP ERP HCM or any other core HR system as the leading system (meaning that their user records are not recorded in Employee Central), the customer needs to set the value of the *SourceOfRecord* field with a picklist entry that indicates the source system in the employmentInfo in the Business Configuration UI.
   For example, if SAP ERP HCM system 'IPP', client 200 is the leading system, then the entry would be 'IPPCLNT200' , or if System AB1 is the leading system, then the entry would be 'SystemAB1'.

   > ⓘ Note
   >
   > The migration tool (Infoporter) can fill this value using the standard mapping that reads the ERP system name from table T100. For more information, refer to Replicating Employee Data from SAP ERP HCM to Employee Central Using SAP Cloud Platform Integration as the Middleware or Replicating Employee Data from SAP S/4HANA to Employee Central.

4. The customer has seasonal employees and has a limited employment relationship for such users (less than or equal to 12 months). The Hire/Rehire and Termination events for a user are compared in the system. Refer to the Additional Notes for Seasonal Workers section for additional information.
5. The customer wants to have the records for users within Employee Central but doesn't want to provide them access to the system. This behavior is done by not assigning login permission role to those specific users. Refer to the System Access section for additional information.

For license compliance, we measure usage based on the count of active users across all the user categories.

Additional Notes for Seasonal Workers

For auditing purposes, a user is classified as seasonal if they have a hire/rehire event triggered before the current date and has a future-dated termination event and the difference between hire/rehire event date and termination event date is less than or equal to 12 months from the current date.

For example, we have 3 scenarios: (As of current date: April 22, 2019)

Scenario 1: A user is hired on April 1, 2019 and has a future-dated termination event as May 31, 2019.

Scenario 2: A user is hired on January 1, 2019 and has a termination event on April 20, 2019.

Scenario 3: A user is hired on January 1, 2019 and has no termination event.

Based on usage metric definition for seasonal users; scenario 1 will qualify as a seasonal user because the hire event was triggered before the current date and has future dated termination event. Also, the length of the service for this user is less than 12 months from the current date.

The users in scenario 2 and 3 do not qualify as seasonal users. Scenario 1 is the only scenario where the user is counted as a seasonal worker. The user in scenario 2 is not counted at all because both hire and termination events are in the past. The user in scenario 3 is counted as full user.

Additional Notes for Employees Recorded Outside of Employee Central

For auditing purposes, the *SourceOfRecord* field is the key field to distinguish if employees are recorded inside or outside of Employee Central. The customer must define the *SourceOfRecord* picklist. The picklist must contain the values 'EC' and 'ONB' plus additional values for each system where employee data is recorded. If that system is an SAP ERP HCM system, then add one value for each system from the client table T000 and put the name of the client into the picklist, for example, 'IPPCLNT200' for system IPP, client 200. For any other external systems, add a unique text string for the system to the picklist, for example, 'SystemAB1' for System AB1.

For Onboarding, onboardees are stored in Employee Central, and the *SourceOfRecord* field has the value 'ONB'. If Employee Central is not used, then the value remains unchanged for all Onboarding users. If Employee Central is used and the hire date is reached, then the value is automatically switched by the system to 'EC'.

> ⓘ Note
>
> Onboarding participants are NOT audited against the Employee Central license. They are audited only against the Onboarding license.

System Access

If you have a set of users for whom you don't want to provide access to the system, you can use a simple setting in role-based permissions, ▌▶ *User Permissions* ❯ *General User Permission* ❯ *User Login* ❱.

> ⓘ Note
>
> Users without login permissions qualify as functional users. By disabling this permission setting, you may not provide access to ANY other solution in the SAP SuccessFactors HCM suite. If it is required for them to access any other solution, then they are classified as a full user.

Related Information

Contingent Workforce Management
Using Role-Based Permissions

3.1 Classifying Users in Employee Central for License Compliance

Classify users in your instance correctly to remain compliant with your SAP SuccessFactors license.

Prerequisites

- Ensure that the *Source of Record* picklist is imported and updated in the system.

  > ⓘ Note
  >
  > All configuration files for Employee Central, for example, master data models, master picklists, as well as country/region-specific files, have moved from the SAP Help Portal to the Software Download Center🚢.

  You update picklists in ▶ *Admin Center* ❯ *Picklist Center* ❯. The picklist must contain the values "EC", "ONB", "FG", "MDI", "MDI_FG" as well as any values for each external system where employee data is recorded.

- Ensure that you understand the required settings needed for contingent workers. For more information, refer to the Required Properties for Contingent Worker Fields for employmentInfo in the Implementing Support for Contingent Workers in Employee Central as Part of Total Workforce Management guide on the SAP Help Portal. Contingent Workers integrated from SAP Fieldglass do not require a functional user license in Employee Central.

Context

A comparison of whether a user is a full or functional user can be done based on license entitlements that the customer currently has. In Employee Central, there is no one standard or custom field available to specifically classify users as full or functional, but they are identified based on configuration settings done in the system.

Procedure

1. Go to ▶ *Admin Center* ❯ *Manage Business Configuration* ❯.
2. Select ▶ *Employee Central* ❯ *employmentInfo* ❯.
3. Set the contingent worker fields.
   a. Find the *Is Contingent Worker* field and select *Details*. Fill out the required properties.

      > ⓘ Note
      >
      > Once enabled, only change this field using a data import.

   b. Select *Done*.

4. Find the *is EC Record* field. If it is not in the list, add the field. Set the *Enabled* field to *Yes*.

> **ⓘ Note**
>
> When you import employee data for the first time, the basic user import creates the user, employment, and person information. Since there is no way to distinguish whether the user record will be managed in Employee Central or not, the `<isECRecord>` field is set to 0.
>
> You can then use the Employment information import or the Job Information import to update the data. The import update means that the employment records are considered managed data in Employee Central, meaning that the `<isECRecord>` field is set to 1.
>
> This field is not editable.

5. Find the *Source of Record* field. If it is not in the list, add the field. Set the *Enabled* field to *Yes*.
   a. Select *Details*.
   b. In the *Type of Reference Object* field, select *Picklist*.
   c. In the *Picklist* field, select the *SourceOfRecord* picklist.
   d. Select *Done*.
6. Save your changes.

Next Steps

To update existing records, customer must export Employment Information and import with the correct picklist value. At the end they only need to update employments that are either managed in an external ERP system or are records with the value "ONB". For Employee Central records, they do not necessarily have to update any records because the system considers the values "EC" and Null as equal.

Complete the data import to update any contingent worker information.

Related Information

Importing Contingent Worker Data
Implementing Picklists

3.2 Measuring Functional User Usage in Employee Central

Measure functional users who are using Employee Central to verify your compliance with SAP SuccessFactors license agreements. This usage measurement for is **only** for non-employees (including contingent and contractor workers) and employees where Employee Central is not the system of record, but they are recorded in SAP ERP HCM or any other core HR System.

Prerequisites

- You must have all required permissions for Reporting.
- Users in Employee Central must be correctly classified.
- You have counted your seasonal workers.
  To do this, go the Seasonal Workers section of the Employee Central Advanced Reporting: How to Use Standard Reports guide found on the SAP Help Portal.

Context

You can create a report in your system to monitor the functional user usage in the system to ensure that you stay compliant with your license.

> ⓘ Note
>
> If you are running multiple productive tenant instances, you need to run this report in each one, and then add the totals for each of them to calculate the aggregated total number of users.

Procedure

1. Go to the *Report Center*.
2. Create a new report.
3. Select the *Report Table* template and then select *Select*.
4. For the *How would you like your data to be structured?* question, choose *Single Domain*. For the *What data would you like to start with?* question, select *Person and Employment Info (as of Date)*. Then *Select*.
5. Add the *Report Name* and the *Description* of the report, then select *Save*.
6. Select *People*.
7. On the *People* page, identify the view used for the report. Select *Refine Criteria*.

   You must have full access to the entire user population, otherwise, role-based permissions restricts the population that is included in the report.
8. In the *Define Team* view, select *Other Filters*. Select *OK*.

Make sure that the *Include inactive users* checkbox is selected.

9. Select *Columns* and select *Select Columns* to identify the columns necessary for the report.

10. From *Employee Information*, select *User/Employee ID*. From *Person Info*, select *Person ID*. From *Job Information*, select *Contingent Worker* and *Source of Record*. Select *Done*.

    The number of unique active Person IDs is the field used for usage measurement. The number of unique Person IDs can be created as a "measure", with other fields as groupings (for example, by "source of record") as needed.

11. Select *Filters* and then *Refine Criteria* to identify the filters to be used for your report.

12. In the *Filter* view, under *Columns*, select *Job Information*. Under *Filters*, select *Employee Status*, then select *Done*.

13. In the *Define Employee Status Filter* view, in the *By My Selection* section, select *By My Selection*. Select the following:

    - Active
    - Dormant
    - Paid Leave
    - Retired
    - Suspended
    - Unpaid Leave

    Select *Done*.

14. Also in *Job Information*, select the *Employment Details SourceOfRecord* checkbox.

15. Select *By My Selection* to create a rule by selecting the values based on your picklist configuration. Ensure that *ONB* is **NOT** selected.

16. Verify the selection and select *Done*.

17. To generate the report, select *Save* and *Generate*.

18. Review the report and download it to CSV, Excel, PDF, or PPT for further analysis. This report can also be viewed from the *Report Center* – select by *Last Modified* date or by report *Name*.

Results

The results are listed in the report. You may need to create a pivot table to count active users by Contingent Worker or Source of Record flag. The pivot table may also be necessary for the count if you have active users with concurrent employment or a global assignment.

3.3 Measuring Full User Usage in Employee Central

Measure full users who are using Employee Central to verify your compliance with SAP SuccessFactors license agreements.

Prerequisites

- You must have all required permissions for Reporting.
- Users in Employee Central must be correctly classified.

Context

You can create a report in your system to monitor the full user usage in the system to ensure that you stay compliant with your license.

> ⓘ Note
>
> If you are running multiple productive tenant instances, you need to run this report in each one, and then add the totals for each of them to calculate the aggregated total number of users.

Procedure

1. Go to the *Report Center*.
2. Create a new report.
3. Select the *Report Table* template and then select *Select*.
4. For the *How would you like your data to be structured?* question, choose *Single Domain*. For the *What data would you like to start with?* question, select *Person and Employment Info (as of Date)*. Then *Select*.
5. Add the *Report Name* and the *Description* of the report, then select *Save*.
6. Select *People*.
7. On the *People* page, identify the view used for the report. Select *Refine Criteria*.

   You must have full access to the entire user population, otherwise, role-based permissions restricts the population that is included in the report.
8. In the *Define Team* view, select *Other Filters*. Select *OK*.

   Make sure that the *Include inactive users* checkbox is not selected.
9. Select *Columns* and select *Select Columns* to identify the columns necessary for the report.
10. From *Employee Information*, select *User/Employee ID*. From *Person Info*, select *Person ID*. From *Job Information*, select *Employee Status* and *Country/Region*. Select *Done*.

The number of unique active User/Employee IDs is the field used for usage measurement. The number of unique User/Employee IDs can be created as a "measure", with other fields as groupings (for example, by "country/region") as needed.

11. Select *Filters* and then *Refine Criteria* to identify the filters to be used for your report.

12. In the *Filter* view, under *Columns*, select *Job Information*. Under *Filters*, select *Employee Status*, then select *Done*.

13. In the *Define Employee Status Filter* view, in the *By My Selection* section, select *By My Selection*. Select the following:

    - Active
    - Paid Leave
    - Suspended
    - Unpaid Leave

    Select *Done*.

14. Also in *Job Information*, select the *Employment Details SourceOfRecord* checkbox.

15. Select *By My Selection* to create a rule by selecting the values based on your picklist configuration. Ensure that *ONB* is **NOT** selected.

16. Verify the selection and select *Done*.

17. To generate the report, select *Save* and *Generate*.

18. Review the report and download it to CSV, Excel, PDF, or PPT for further analysis. This report can also be viewed from the *Report Center* – select by *Last Modified* date or by report *Name*.

Results

The report gives you the number of user/Employee IDs. This value reflects the number of users/employees who are flagged as active in the system. To check the count, select the User/Employee ID column to see the count displayed in the spreadsheet. This number shows how many active users are using Employee Central.

4 User Types in Learning

In Learning, users are considered to be either active or functional.

For auditing purposes, all functional users with active profiles in the system are compared to the number of functional licenses that have been purchased by the customer and all active users with active profiles in the system are compared to the number of full licenses purchased by the customer.

In cases where the customer only has full licenses, then all internal or functional/external users with active profiles in the system will be compared to full licenses purchased by the customer.

How users are defined

Active User	Functional User
Available for the following:	Available for following categories of individual:
• Users with active profiles in the system that are not classified as functional	• Non-employee (includes contingent/contractors) • Seasonal workers Individuals with a limited or temporary employee relationship during the course of a year of 12 month period • Employees and non-employees whose records are recorded within Learning but who don't have access to the system

How users are measured

Active User	Functional User

• Has the status active
• Is **not** a Learning Marketplace user
• Is **not** identified as Functional User
• Meets one of these criteria:
  • Has a learning history record for an internal or external course
  • Has enrolled in a course and that course is on the user's learning plan
  • Has launched a course and that course is on the user's learning plan
	• Has the status active
	• Is **not** a Learning Marketplace user
	• Is identified as Functional User
	• Meets one of these criteria
	  • Has a learning history record for an internal or external course
	  • Has enrolled in a course and that course is on the user's learning plan
	  • Has launched a course and that course is on the user's learning plan

4.1 Setting License User Types in Learning Administration

Classify users in your instance correctly to remain compliant with your SAP SuccessFactors license.

Context

If customers have purchased SAP SuccessFactors Learning external or functional licenses and are using shopping account type or any other custom field in the system to classify the users as external, then they need to run the steps given in the procedure to classify the users correctly.

Procedure

1. Go to *Learning Administration*, and then go to ▌ *Users* ❯ *Users* ▌.
2. Search for the user to find the user with the incorrect type and edit the record.
3. In *License User Type*, select the license type of the user:

   - *Active*
   - *Functional*

   > ⓘ Note
   >
   > By default, the *License User Type* field is set to *Active* in the system.

   For more information, refer to User Types in Learning.

   You may also find Marking Employees as Contingent Workers in Non-Employee Central Systems helpful.

4. Select *Apply Changes*.

   > ⓘ Note
   >
   > License User Type is available as a new search option when you search for users in Learning. The types of License User Types are **Active** and **Functional** users, who are added using the SAP SuccessFactors User connector. The SAP SuccessFactors User connector supports the two values of ACTIVE and FUNCTIONAL, which are case-sensitive. You can however, use custom values for this using the following configurations:
   >
   > - ```
   >   user.field.transform.data.LICENSE_USER_TYPE.ACTIVE=Active,active
   >   ```
   >
   > - ```
   >   user.field.transform.data.LICENSE_USER_TYPE.FUNCTIONAL=Functional,functiona
   >   l
   >   ```
   >
   > You can use custom fields in the SAP SuccessFactors HCM suite and map it to the SAP SuccessFactors Learning license type. However, you cannot use a custom field in SAP SuccessFactors Learning for license type. This is done using the following configuration:
   >
   > - ```
   >   user.field.mapping.data.LICENSE_USER_TYPE=
   >   ```

4.2 Enabling Administrators to Run the SAP SuccessFactors Learning Usage Metrics Report

Enable administrators to run the SAP SuccessFactors Learning Usage Metrics report to see whether the number of users in the system match your license agreement.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to ▶ *System Admin* ❯ *Security* ❯ *Role Management* ❯.
2. Open the role for the administrators who should be able to run the report.
3. Go to *Workflows* and add Run LMS Usage Metrics Report.

4.3 Running SAP SuccessFactors Learning Usage Metrics Report

Run the SAP SuccessFactors Learning Usage Metrics report to see whether the number of users in the system match your license agreement.

Context

You are running this report to measure functional users in Learning. You can use it to identify problems in your user classification.

> ⓘ Note
>
> If you are running multiple productive tenant instances, you will need to run this report in each one, and then add the totals for each of them to calculate the aggregated total number of users.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to *Reports*.
2. Select *System Admin* and then type `metrics` in *Search*.
3. Select *LMS Usage Metrics*.
4. In *Metrics From*, type the start date for the report or leave the date blank to return the most recent data points.

The report provides metric data for the most recently stored date. If you need metric data from multiple periods, enter a date into the *Metrics From* field.

The data in the report are computed and stored periodically and not when the report is run. Running the report retrieves previously computed and stored data.

5. Select *Run Report*.

Next Steps

To calculate the number of Learning users, add the Active Users and the Functional Users.

4.4 Running Reports in Learning

Run Learning reports when you want to get data from Learning.

Context

The value of the maximum time for reports to run has been fixed at 24 hours, and that of the maximum storage size for reports has been fixed at 5 GB in the system. These limits are set to a higher value to prevent any interruption in business, and they don't impact any recurring reports as per current analysis.

> ⓘ Note
>
> Learning reports are unique in SAP SuccessFactors. They don't pull data from other modules. If you want to run a report that gets data from outside Learning, use the suite-wide reporting tools. PRD doesn't provide backup, and file recovery capabilities that data extraction tools do. Avoid using PRD as a substitute for such tools, as it can cause timeout issues, or partial file extracts.

> → Remember
>
> Reports generated using Plateau Designer Report (PRD) aren't recommended to be used in place of integration or data extraction tools that SAP SuccessFactors offers. PRD doesn't provide backup, or file recovery capabilities that data extraction tools do. Avoid using PRD as a substitute for such tools, as it can cause timeout issues, or partial file extracts.
>
> SAP recommends you to use filters while running reports that produce large data, or have a long runtime.

Procedure

1. Find the report you want to run.

You can use the search facility or you can browse the reports. Read the report descriptions to determine if it's the right report for you.

2. If the report is a member of a report group, expand the group.

   Report groups are reports that run the same query but whose results are grouped differently. Look for the report that groups its results as you want to see them.

3. Select the title of the report that you want to run.

   The report form opens so that you can change the details of the report, including its format and the data that it includes.

4. Change the layout of the report with titles, page breaks, headers, and footers.

   Not all reports have the same layout options.

5. Select the information that you want the report to return by using the filters in the report form.

   > ⓘ Note
   >
   > • You can use wild card characters in your searches (_ for single character and **%** for multiple characters). To use these wild card characters, set the `enableSingleCharacterWildCard` and `enableMultipleCharacterWildCard` properties to **true** respectively. For more information about configuring the properties, refer the **Related Information** section.
   > • Unless otherwise stated, fields that filter by date will return data in the time zone of the user who generates the report. For example, if a user in India Standard Time generates a report with a *Required Date From* of May 25, 2022 and a *Required Date To* of May 31, 2022, the report will contain records with required dates between May 25, 2022 12:00:00 AM IST and May 31, 2022 11:59:59 PM IST.

6. Select *Mask User IDs* to mask user IDs for data privacy.

7. In *Report Destination*, select how you want to receive the report data.

   • Select *Browser* to view the report on a web browser.
   • Select *Local File* to save the report to your computer.

   > ⓘ Note
   >
   > CSV reports can only be saved as a local file.

8. In *Report Format*, select the file format of the report.

   Different formats offer different advantages. PDF reports, for example, are useful for presentations and CSV (delimited) reports are useful for pulling data out of Learning so that you can analyze it in a tool like Microsoft Excel.

   Although the format **CSV** is the initials of Comma-Separated Values, you can choose your own delimiter.

9. Run the report.

   • Select *Run Report* to run the report immediately.
   • Select *Save Report* to save the report.
   • Select *Schedule* to schedule the report to run later.

Related Information

4.5   Importing License User Types in Learning Administration (Batch Import)

To update multiple user licenses in one go, you can run a batch import for the changes.

Prerequisites

You have exported of all your users with their user ID (based on user-sys-ID).

Procedure

1. In your Learning instance, go to ▌▶ *System Admin* ❯ *Tools* ❯ *Import Data* ▌.
2. Select the *Record* type of User and then select *Download Template* to get the latest import template.
3. Add the users in the *User ID* column.
4. Add the correct *License User Type* for the users and save your changes.

   For new users, if this field is left blank, the system will default the type to *Active*.
5. Select *Import Data* to import the records.
6. Browse to find the file and select *Submit*.

   You are prompted to import as a background job. Here, you can choose whether to run the job immediately or to schedule to run the job at a later, determined date. At this time, you either want to enter or update the job description in the *Job Description* box.
7. Select *Finish*.
8. Select *Continue Importing Data*.

Results

When the file is uploaded, it appears in the *Import Results* log.

5 Generating Table Reports for Usage Hires in Recruiting

Generate table reports for Recruiting Usage Hires. Recruiting Hire Usage refers to the count of distinct Application IDs associated with either a hireable or hired status, or falling within the status categories of *HIRED*, *PRESTART*, *ONBOARD*, or *EMPLOYEE*

Prerequisites

- Ensure that you've configured the Application Status IDs and their corresponding Names designated as either Hireable or Hired.

  > ⓘ Note
  >
  > Here, *Hirable* and *Hire* are example options for the *Hireable Options* field. These options may be customized as per your requirements for your instance. When configuring the query for the table report, use the options for *Hireable Options* as configured in your instances.

- Additionally, include in the list all Application Status IDs and Names categorized under the following Application Status Group Categories: *HIRED*, *PRESTART*, *ONBOARD*, or *EMPLOYEE*.

Context

You want to generate a table report for Recruiting Usage Hires where the application status includes those statuses that meets either of the following criteria:

- The Application Status selected is either *Hireable* or *Hire* in ▏▶ *Application Status Settings* ❯ *Hirable Options* ❯.
- The Application Status where the *Application Statuses Categories* are *HIRED*, *PRESTART*, *ONBOARD*, or *EMPLOYEE*.

Procedure

1. In your SAP SuccessFactors application, go to *Reporting*.
2. Choose *New*.
3. Select the *Table* report type and choose *Select*.
4. Choose *Single Domain* option to structure the data.
5. Choose *Recruiting V2* from the dropdown.
6. In the *General Info* tab,

a. In the *Report Name* field, provide a suitable name.

　　　b. In the *Description* field provide a suitable description

　　　c. Choose *Save*.

7. In the *Columns* tab,

　　　a. Choose *Select Columns*.

　　　b. For *App Status Audit Trail*, select these columns: *Application ID*, *Application Status*, *Application Status Category* and *Created Date*.

　　　　　The selected columns are displayed under the *Edit Columns* section.

　　　c. Choose *Done*.

8. Go to *Filters* tab.

　　In this section, you will need to setup the filters required for *App Status Audit Trail*.

9. Choose *+ Add Group* and create two *Filter Groups*.

　　Create two *Filter Groups* that includes a combination of these filters - *Skipped Status*, *Created Date*, *Application Status Category* and *Application Status*.

　　For example, In Filter Group 1 you could set the criteria for *Created Date*, *Application Status Category* and *Skipped Status*. And, in Filter Group 2 you can set the criteria for *Created Date*, *Skipped Status* and *Application Status*. Creating two filter groups help derive accurate results.

10. For a given *Filter Group* choose *Refine Criteria* to configure the criteria for the report.

　　　a. Choose ▶ *App Status Audit Trail* ❯ *Skipped Status* ❯ .

　　　b. Choose *By My Selection* and select *Not Skipped*.

　　　c. Choose ▶ *App Status Audit Trail* ❯ *Created Date* ❯

　　　d. Choose *By Rule*.

　　　e. Choose *Add Rule*.

　　　f. Choose *Greater than or equal to* from the dropdown and choose a date from the adjacent dropdown.

　　　　　Choose a date that is at least one year before your contract anniversary date for subscription to capture the first transaction. For instance, for a 01/01/2023 contract date usage reporting, choose 01/01/2022. It's crucial to include all records related to the application in the dataset to maintain consistency and accuracy in the results.

　　　g. Choose *Done*.

　　　h. Choose ▶ *App Status Audit Trail* ❯ *Application Status Category* ❯ .

　　　i. Choose *By Rule*.

　　　j. Choose *Add Rule*.

　　　k. Choose *Equal to* from the dropdown.

　　　l. Choose *HIRED* from the adjacent dropdown.

　　　m. Repeat step **j** and **k** until you've created rules for *PRESTART*, *ONBOARD* and *EMPLOYEE*.

　　　n. Choose *Done*.

　　　o. Choose ▶ *App Status Audit Trail* ❯ *Application Status* ❯ .

　　　p. Choose *By My Selection*.

　　　q. Choose the application statuses as per your configuration in *Application Status Settings*.

　　　r. Choose *Done*.

11. Choose *Save*.

12. Go to ▶ *Report Center* ❯ *My Reports* ❯ and choose the report you just created.

13. In the *Execute* window, select *Download (CSV)* and choose *Generate Report* to generate the report.

Your report is downloaded to your local system.

> ⓘ Note
>
> - If you are running multiple productive tenant instances, you will need to run this report in each one, and then add the totals for each of them to calculate the aggregated total number of users.
> - The SAP Hire Usage is recorded daily, with an exception for situations where both a qualifying hire and a withdrawal takes place on the same day; in such cases, it is omitted from the tally. However, all other occurrences involving qualifying hires and withdrawals are considered in the count.

Next Steps

Visualize the report using pivot tables in Microsoft Excel. A Two-Pivot table is recommended to view the results.

1. The first pivot table is to find the minimum Created Date by Application ID to determine the Month of usage for this Usage Hire.
2. Copy and paste values along with their format from the first pivot table into a new worksheet in preparation for the second pivot table.
3. Create a second pivot table using the worksheet from the copied values, count the Row Labels (Application ID), filter out previous year's minimum date transactions, and in the rows select the **Min of Year** and **Min of Month** for you unique count of hires.

> ⓘ Note
>
> The results depend on the granularity of the generated report.

6   Change History

Learn about changes to the documentation for Managing User License Compliance for SAP SuccessFactors in recent releases.

2H 2024

Type of Change	Description	More Info
Changed	We added information about license usage measuring for Rewards and Recognition module.	SAP SuccessFactors License Compliance Module Details [page 3]
Changed	We added information that contingent workers integrated from SAP Fieldglass do not require a functional user license in Employee Central	Classifying Users in Employee Central for License Compliance [page 27]

1H 2024

Type of Change	Description	More Info
Added	We've added a new topic on generating table reports based on Usage Hires.	Generating Table Reports for Usage Hires in Recruiting [page 39]
Changed	We updated the SAP note links for Goal Management and Career Development Management.	SAP SuccessFactors License Compliance Module Details [page 3]
Removed	We removed information on Learning Marketplace users.	SAP SuccessFactors License Compliance Module Details [page 3]

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