



SAP SuccessFactors 

The Road to Release: Innovation, Co-Created

Administrator Release Process Overview

THE BEST RUN 

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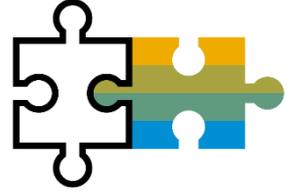
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“SAP SuccessFactors Releases deliver more than features and functionality. For technology to matter, it must serve a purpose.

Together, we will share what's coming, answer questions along the way, and prepare you for your company's continual transformation.”

Understanding Update Scenarios

Before we get started, it's important to first understand the various ways that your instance will be upgraded throughout the year. While your SAP SuccessFactors HXM Suite is upgraded twice a year with game-changing improvements and reliability fixes, you'll also receive scheduled and, if required, unscheduled patches.



First Half 2020 (1H 2020) & Second Half 2020 (2H 2020) Release

While we apply rigorous testing and quality assurance to every update that is applied to your instance, a successful release requires more than high-quality code. We are better when we communicate openly and work together towards our shared success.

With all details and configuration steps combined in one easy-to-use interface, the [What's New Viewer](#) ensures learning about the innovations and technical improvements delivered within a release is easier than ever. Later in this document, we will discuss the critical relationship between Preview and Production Releases, but the Preview Release delivers the latest release to your Preview instance at least four weeks before the Production Release. During this Preview Release window, we highly recommend trying new features, testing all critical use-cases, preparing your administrative team with changes, reviewing the [Known Issues List](#), and interacting with Product Support. [See upcoming release dates.](#)

When either the Preview or Production Release is being deployed, access, scheduled jobs, and reports will be unavailable for about seven hours. While this upgrade typically begins on a Friday night, your company's S-Users will be notified with timely updates.

Scheduled Patches

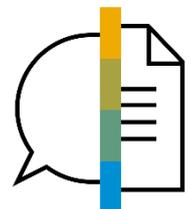
To review potential upgrade windows and details associated within a non-disruptive scheduled patch, please review this [SAP SuccessFactors Community blog](#).

Unscheduled Patches

Although relatively rare, your instance may receive an unscheduled patch to fix a critical functional or security issue.

Administrator Checklist: Preparing for a Release

To achieve our shared goal of transforming your business to meet changing needs and opportunities with a reliable technology, it's important that you understand how you can learn about, prepare for, and make the most out of coming improvements. Below, please find a few recommended steps to consider.



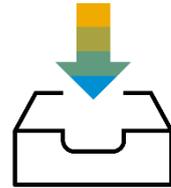
Step 1: Learn About What's Coming

Whether accessing the What's New Viewer to see helpful demonstration videos, contextually relevant configuration advice, and more, you'll have one place to learn about the improvements coming within a release. After reviewing the What's New Viewer, the Release Q&A Series

provides the opportunity for you to pre-submit and kudo your most pressing questions as experts provide simple, direct answers during each session. All available release resources, including the Release Highlights document and video, can be accessed within the [SAP SuccessFactors Community](#).

To receive proactive alerts about available resources and information, you should subscribe to the following communications:

1. [SAP SuccessFactors Compass Newsletter](#) – monthly recap of helpful administrative resources and timely news
2. [SAP SuccessFactors Events Newsletter](#) – monthly recap of complimentary events
3. [SAP SuccessFactors Release Information Email](#) – Typically delivered days before the Preview Release, this email provides a reminder of available release resources.



Step 2: Align Internally

Discuss Key Themes with Business Leaders

To ensure alignment between your HR goals and technology, your company's HR executives and business leaders should be made aware of the high-level Release Highlights document & video.

Advanced Planning with Key Stakeholders

Your company needs to decide whether to apply optional enhancements based on your HR goals and transformation strategy. Most administrators review strategic Opt-In features and then plan meetings across IT, HR, and C-suite leadership to review which are appropriate to enable. We highly recommend establishing a regular, open dialogue with key stakeholders to communicate and discuss possible improvements. As a web-based platform, coordinate with your IT team to ensure compatibility with SAP SuccessFactors HXM Suite's [end-user system requirements](#).

Step 3: Activate Features in Your Preview Instance

As we will explain later in this document, some features are automatically applied, or Universal, and others require either an action within Admin Tools, an incident with Product Support, or a Partner engagement to activate. We highly recommend utilizing your Preview instance, if applicable, to test and try new features. For more information about the different types of features, please view the 'Universal, Opt-In, Opt-Out Features' section within this document.

Step 4: Preview and Production Testing & Interactions with Product Support

Many HR teams dedicate resources during and after the Preview and Production Releases to perform tests and, if needed, to interact with Product Support.

In the days after the Preview release, the [Release Known Issues List](#) will be updated with customer-reported release bugs and their resolution status. While it is our goal to resolve as many issues prior to a Production Release, we recommend assigning additional resources to test and configure your Production instance.

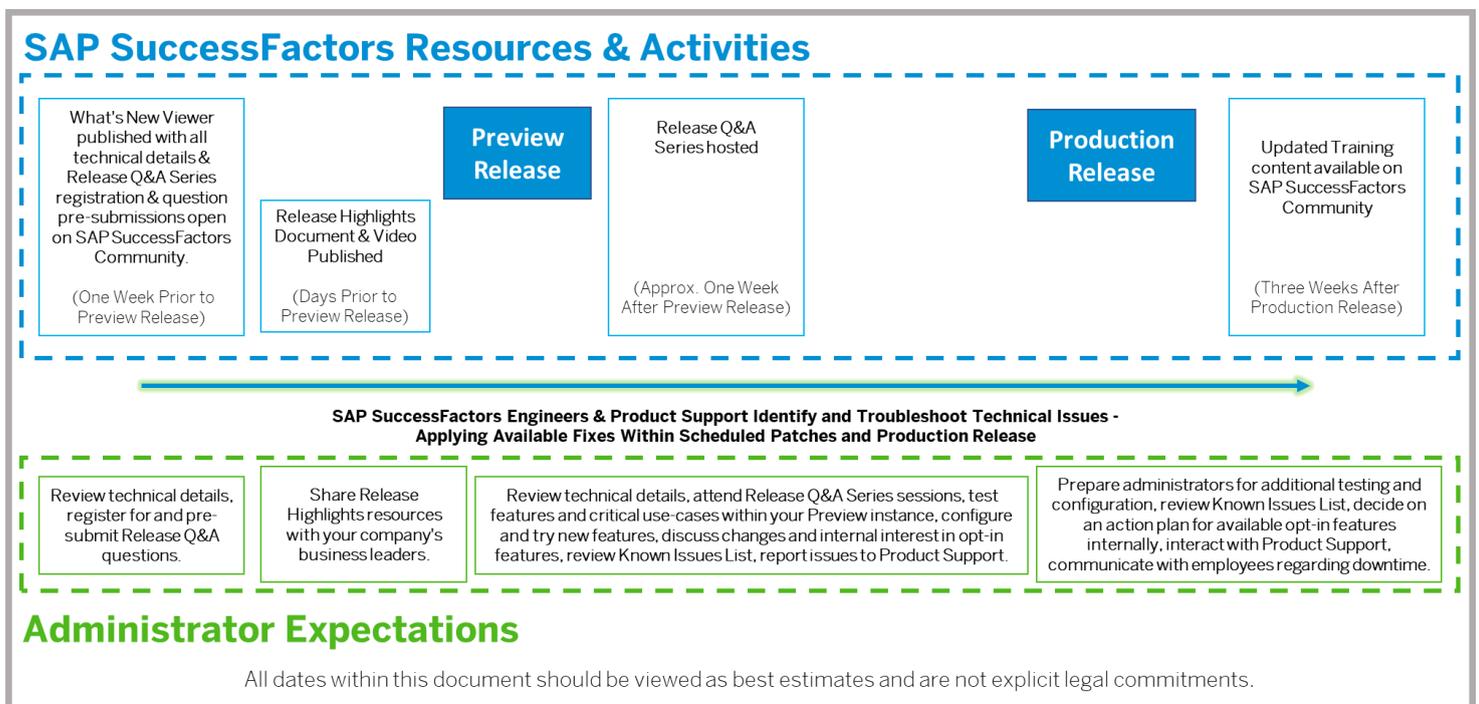
Step 5: Communicate with Your Employees & Update Training Materials

As your Production instance, scheduled jobs, and reports will be unavailable for approximately seven hours during the Production Release, we recommend proactively notifying relevant employees so they can plan accordingly.

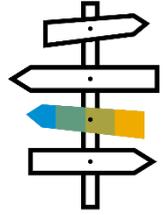
As new features and functionalities are adopted, either by a Universal or an Opt-In feature, be sure to keep your end-user and manager training guides updated. About three weeks after the Production Release, the job aids noted on the [SAP SuccessFactors Training page](#) will be updated. However, if your company has any customized manager or administrator guides, please consider updating each at your earliest convenience.

Visual Timeline of Release Resources and Activities

As a supplement to the information provided above, please find a visual representation of SAP SuccessFactors resources, activities, and administrator actions which, together, ensure a successful release.

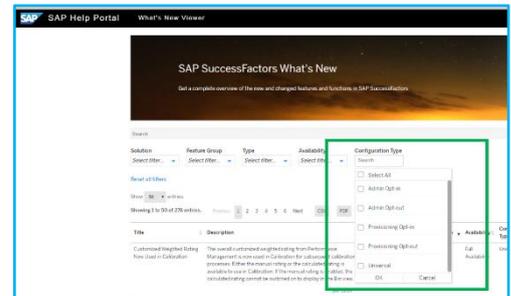


Universal, Opt-In, Opt-Out Features



Noted within the [What's New Viewer](#), features can be toggled by the filters and associated scenarios.

- **Universal** – example for guided learning within What's New Viewer: SCM-14044. If you already have Matrix Grid Reports or Talent Pools enabled within Succession, no additional steps are required for picklist labels to be displayed in Matrix Grid Reports or Talent Pools. If you don't have Succession Org Chart, you won't be impacted by this item. If your company implements Matrix Grid Reports later, you'll see this feature without any additional steps.



- **Admin Opt-In** – example for guided learning within What's New Viewer: SCM-13460. If your company is using Succession Org Chart, you'll have to take an action to enable this feature and can do so without engaging Product Support.
- **Admin Opt-Out** – example for guided learning within What's New Viewer: ECT-126446. If your company has Employee Central and Centralized Services, you can choose to disable the additional Centralized Services functionality without engaging Product Support.
- **Provisioning Opt-In** - You can enable a feature with either a Partner or Product Support request (relatively rare).
- **Provisioning Opt-Out** - You can disable a feature with either a Partner or Product Support request (relatively rare).

Making the Most Out of the Preview Release

In this section, we will review the relationship between your Preview and Production instances and specifically how we can work together during this critical time. If configured, your Preview instance allows you to troubleshoot and test a release at least a month before a similar update is delivered to your Production environment.* But, utilized to its full potential, your Preview instance can be an springboard of innovation — one that allows you to try new features and functionality without the risk of causing an issue within your Production environment.

By testing critical use-cases, reviewing Universal changes, activating Opt-In features, or even disabling Opt-Out features, your attention is critical between the Preview and Production Releases. During this time, our teams will be working behind the scenes to identify, troubleshoot, and, if possible, resolve issues prior to the Production Release. *During this period, we will apply available fixes within [scheduled patch windows](#). In addition to scheduled patches, the Production Release itself will be another opportunity to apply available fixes.

SAP SuccessFactors

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