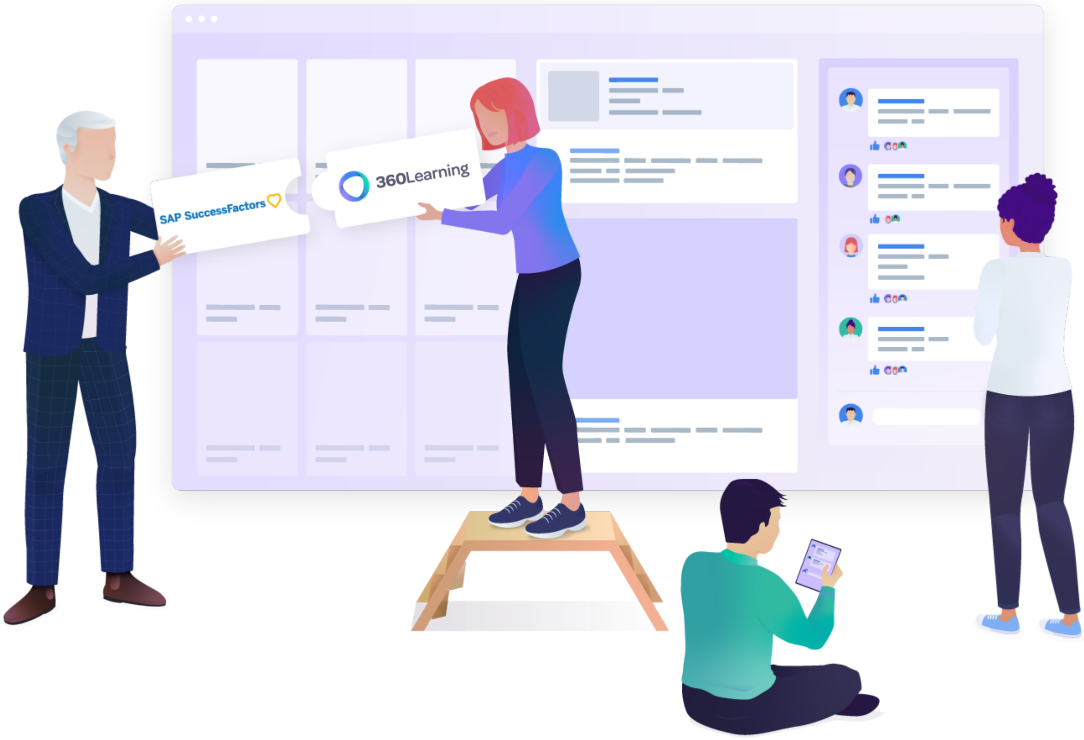
360Learning



360Learning - SuccessFactors

Integration setup and testing guide

This technical guide is part of our Technical Documentation.

Version 2.0.2

Experience Learning **Together**

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1. Integration overview

360Learning provides a standard connector to the SuccessFactors platform. No custom development is required on both the SuccessFactors and 360Learning side.

The purpose of this document is to describe the functional perimeter as well as the configuration steps to setup the integration on both the SuccessFactors and the 360Learning platforms.

1.1 Perimeter of the connector

It is important to understand that the connector is **set on a group** in the 360Learning platform. We will call this group the **synced group**.

- The synced group may be any group in the 360Learning platform, not necessarily the top-level group

Users in the perimeter

The connector will take into account all Users

- in the **synced group** or in any public or private subgroup of the **synced group**
- and present in your BizX instance, as set in chapter 2 of this document

Courses and Programs in the perimeter

The principle is that all courses and programs that a user in the perimeter can play should be sent into SuccessFactors LMS.

The following courses and programs will be sent into SuccessFactors:

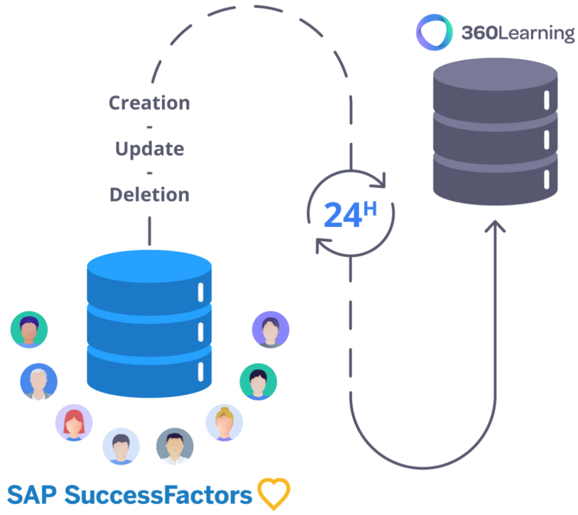
- courses shared in the catalog of any public or private subgroup of the synced group
- program sessions either:
    - in the catalog of any public or private subgroup of the synced group
    - to which any public or private subgroup of the synced group is registered
    - to which any user in the perimeter is registered

It is the role and responsibility of the SuccessFactors LMS admins to decide which learning content are actually imported into SuccessFactors (see chapter 5.3.1) and to decide to which catalog to assign them.

Note: Program sessions finished before the initial setup of the connector will not be added into SuccessFactors.

1.2 Users synchronization

The connector performs a daily synchronization of users data from SuccessFactors into 360Learning.



The user synchronization is performed with the BizX OAuth API. Creations, Updates and Deletions are managed.

The following SuccessFactors user fields are synchronized:

- `userId` (not displayed in 360Learning)
- `firstName`
- `lastName`
- `defaultFullName` => `name` in 360Learning
- `email`
- `businessPhone`
- `title` => `job` in 360Learning
- `defaultLocale`
- `manager`

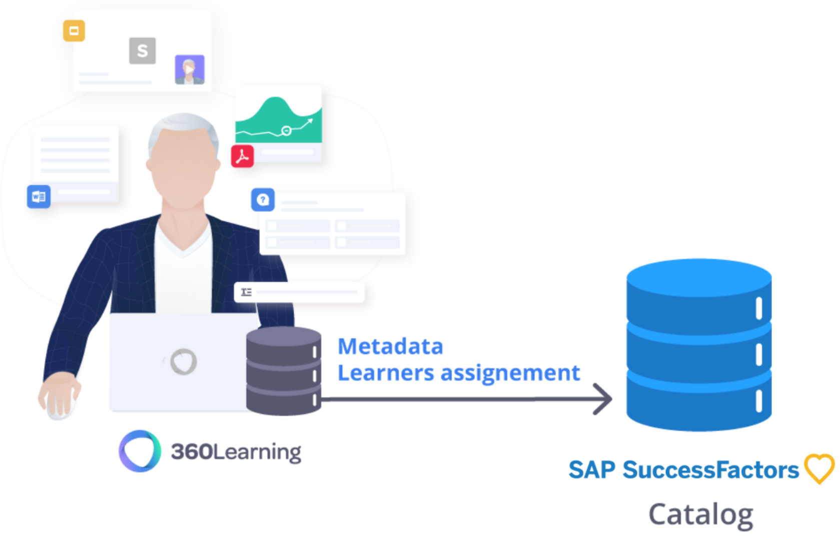
Notes

- If a user or an admin changes one of these field in 360Learning, it will be overwritten during the next daily sync
- Other fields, defined in 360Learning, are not affected by the connector
- A user declared as inactive in BizX will be deleted in 360Learning. If he is reactivated, he will be reactivated in 360Learning
- When a new user is found in BizX, he is by default set as a Learner in the **synced group**

1.3 Authors User Story

Authors are the experts in the company who create courses in the 360Learning platform.

Once authors have created courses and programs on the 360Learning platform, the data for these courses and programs are uploaded into SuccessFactors as `Items`. They can then be imported and used by the administrator of the SuccessFactors instance.



The following fields are uploaded:

Courses

- providerID. As defined in chapter 3.5.1. Not necessarily 360Learning.
- status. Possible values: ACTIVE, INACTIVE, DELETED
- title
- description
- launch url. This is the url to which Learners will be sent to play 360Learning courses.
- thumbnail url. The image of the course
- duration. A string. Ex: "30 minutes"

Program sessions

- providerID. As defined in chapter 3.5.1. Not necessarily 360Learning.
- status. Possible values: ACTIVE, INACTIVE, DELETED
- title
- description
- launch url. This is the url to which Learners will be sent to play 360Learning courses.
- thumbnail url. The image of the course

- duration. A string. Ex: "30 minutes"
- StartDate
- endDate

Notes

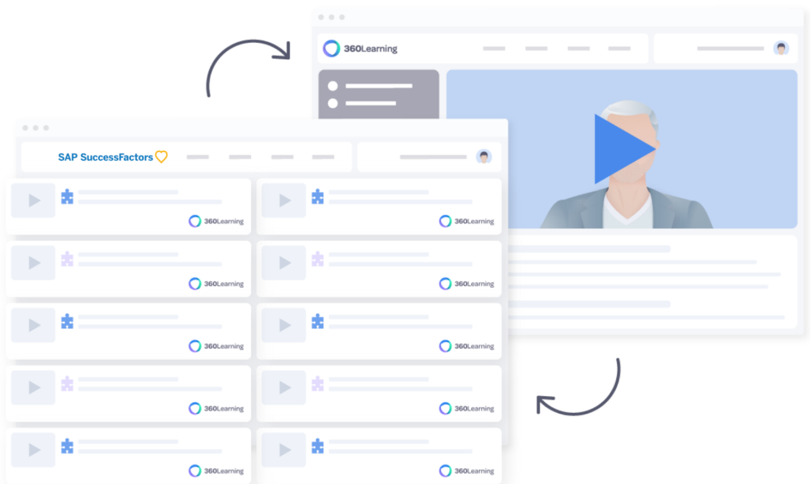
- When a course or a program session has been uploaded in SuccessFactors, a manual operation is required by the LMS admin in SuccessFactors, described in chapter 5.3.1
- Once a course or a program session has been imported in SuccessFactors, its metadata is automatically updated thanks to the setup described in 5.5.
- In SuccessFactors, an item will only be presented to a user if the metadata exists in his language. To work around this, metadata is sent untranslated in all languages found in the SuccessFactors platform.

1.4 Learners User Story

Learners can reach the 360Learning platform either from their SuccessFactors catalog or directly. In both cases, if Single Sign On is set, they don't need a specific password for the 360Learning platform.

Learners can see courses and programs from the 360Learning platform in their SuccessFactors catalog. When they click on a course from SuccessFactors they are sent to the 360Learning platform to play the course.
If the learner was not yet assigned to a session, he will automatically be assigned to the session when coming from SuccessFactors.

Usage statistics are uploaded daily on the SuccessFactors platform using the SuccessFactors API.



Learning Statistics

- Learning statistics are sent daily.
- Statistics are only sent for courses, program sessions, and path sessions that have been imported into SuccessFactors LMS (see 5.3.1)
- Statistics are only synchronized for open sessions. Statistics of sessions that are ended are not synchronized.
- Only completion statistics are sent:

SuccessFactor field	360Learning field	Required
`courseCompleted`	`true`	Yes
`courseID`	`_id`	Yes
`providerID`	`provider`	Yes
`totalHours`	During the integration setup, you can choose to map the total hours to either of the following: • Actual time spent on the attempt • Estimated duration	Yes
`userID`	`externalIDs.value`	Yes
`completedTimestamp`	Minimum of all `completedAt`	No
`grade`	Maximum of all `score`	No

Notes

- When a user launches a 360Learning course from SuccessFactors, a new browser opens with the Learning course.

1.5 Administrators User Story

Courses catalog and users' learning history from the 360Learning platform are available in the SuccessFactors database as `Items`.

Administrators can then integrate all the learning materials from 360Learning into their HR and business workflows.

Beyond what we've already covered, there are some optional features you may wish to have activated on your user management integration.

1.6 Optional features

1.6.1 Adding User Custom Fields to Users

"User Custom Fields" in 360Learning are additional tags that can be added to Users to reflect some of the metadata that exists in the HR System. **You can choose any field that is associated with Users in SAP SuccessFactor Employee Central.**
Each field and its associated value will be created automatically as a User Custom Field in the following format: "Field_name : Field_value"; for example, if you choose "Location", you have users with Label "Location: Paris" or "Location: New York".

The User Custom Fields will be updated automatically and removed for users as the metadata is modified in the HRIS.

You will need to provide the *exact* names of the fields to be used as User Custom Fields to your Solution Architect. This is necessary for the setup of the integration on our backend as it is not currently available for customers to set up on their own.

1.6.2 Adding Users to Groups in 360Learning

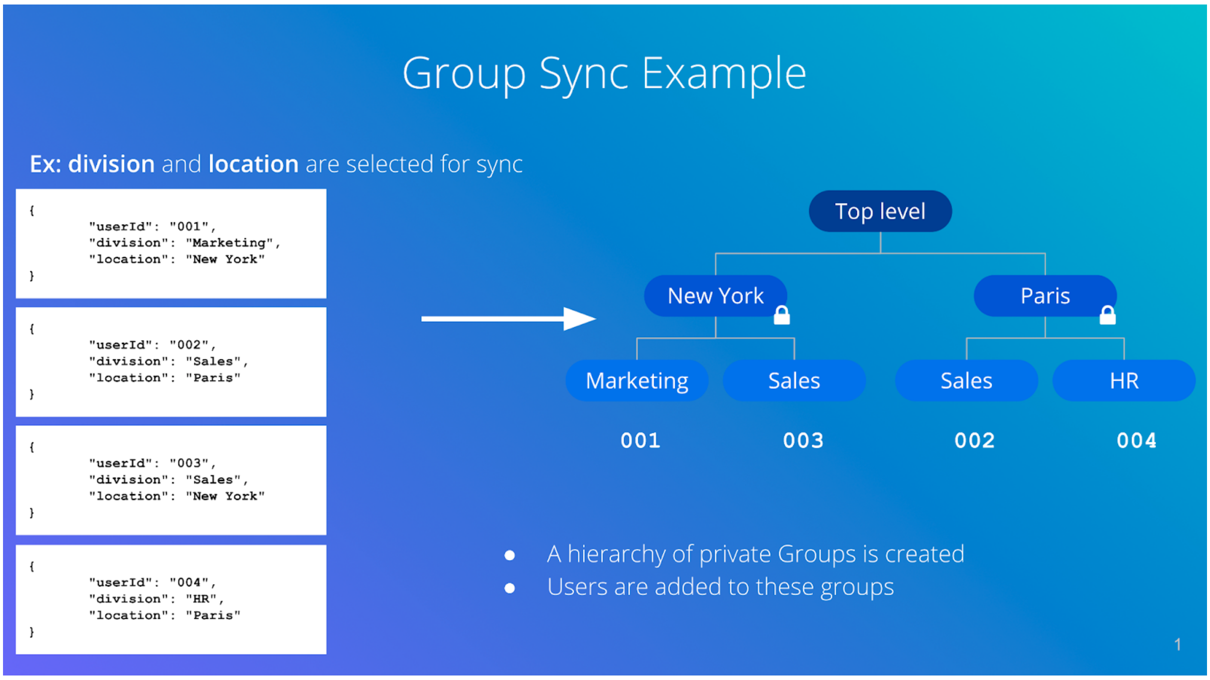
Users can be automatically assigned to groups, by 3 different ways. Please check with your Solution Architect for more information.

A/ Simple Group Assignment

Users are added to the group where the connector is set, no questions asked.

B/ Basic Group Assignment

Users are added to some groups of a hierarchy based on pre-assignments made in SAP Successfactor



Setting up the hierarchy

With your Solution Architect, a workshop will be organized to determine the best group hierarchy to reflect your organization's structure. The main condition to be able to use this feature is that each level should be linked to a single User field in SAP.

Level I: user_field A
Level II: user_field B
Level III: user_field C
In the example we used:

Level I: location
Level II: department

The main prerequisite is that each field must be a metadata obtainable when querying for the list of users when we do the provisioning.

How it will work

The integration will only handle group memberships for groups that are part of this "tree", any manually created groups outside will remain 100% manually managed.

Upon user creation/update, the integration will assign learners to the lowest level group (department in our example). From there, the group hierarchy and the public/private group settings will take care of learner assignments to the higher level groups.

If at any stage of user creation the group cannot be found, the user's metadata has no match, or any other issue, the user will be created in the group with which the integration is set.

If at any stage of user update the group cannot be found, the user's metadata has no match, or any other issue, the user will remain in the group(s) it already is.

C/ Advanced Group Synchronization

Allows the assignment of users in any group of the platform, regarding some predefined rules based on user information.

This feature is detailed in this Knowledge Base article.

1.6.3 "Silent" User creation

By default, users receive a welcome email after they have been created in 360Learning. An option is available to not send this email to any user.

1.6.4 Mapping the training completion total hours to the estimated duration

By default, the total hours in the learning statistics are mapped to the actual time spent by the learner on the attempt. During the integration setup, you can choose to map the total hours to the estimated duration. Contact your CSP or SA for more information.

2. SuccessFactors BizX Setup Instructions
In this document, we will call **<bizXUrl>** the URL of your BizX tenant.
Example: https://apisalesdemo4.successfactors.com

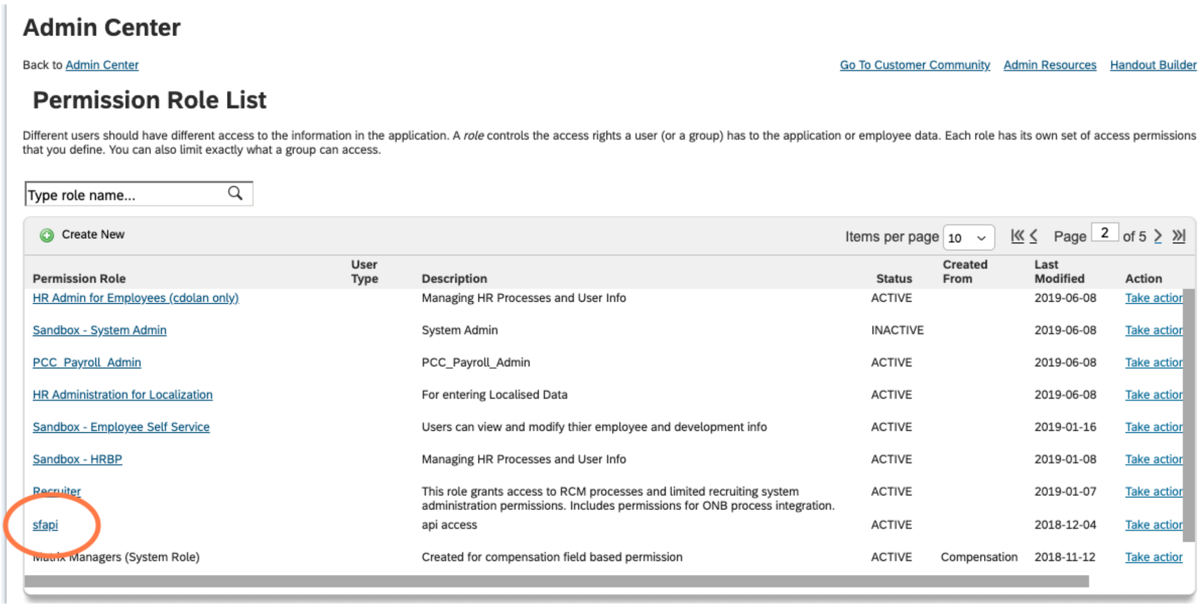
2.1 Log in to your SuccessFactors instance with an administrator account.

2.2 If you haven't already used your BizX API

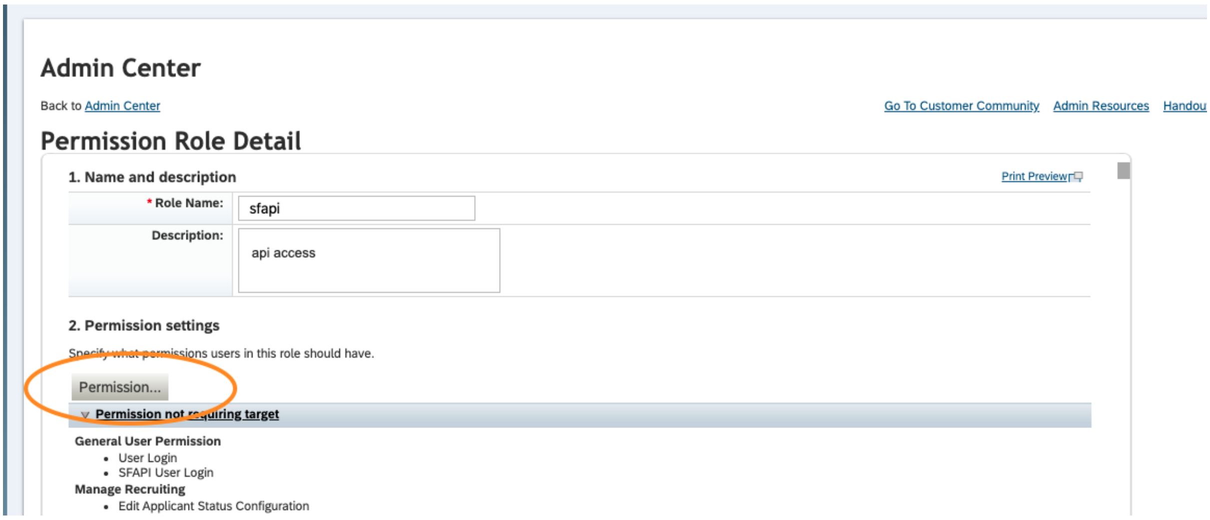
Please review the document called "Creating a Technical or API User" on your SAP support portal.

2.3 Check Permissions

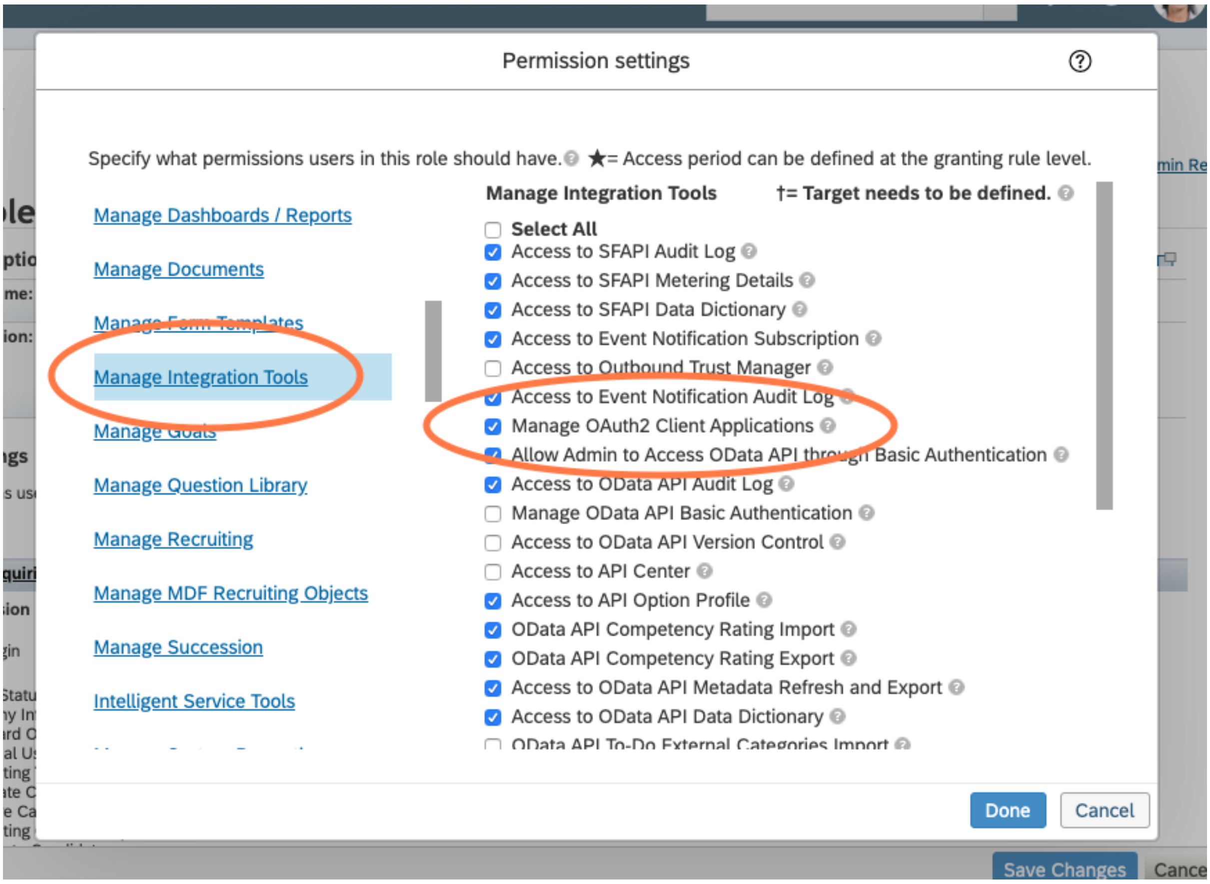
Go to **Admin Center => Tools => Manage Permission Roles**
Select the **sfapi** role.



Click on **Permission**



Scroll down and select **Manage Integration Tools**
Check that **Manage OAuth2 Client Applications** is checked.

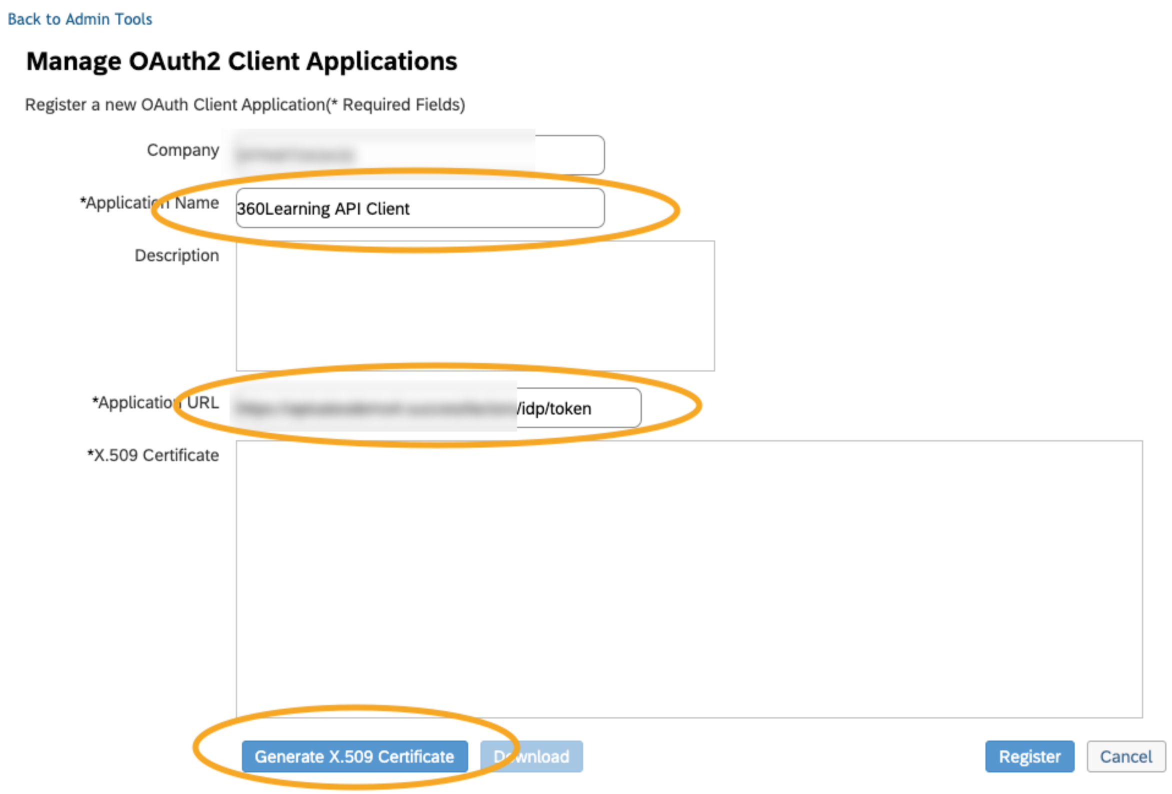


If you need to check the option, click **Done** and **Save Changes**.

2.4 Register the Client Application for the API access

Go to **Admin Center => Tools => Manage OAuth2 Client Applications**

Click on **Register Client Application**

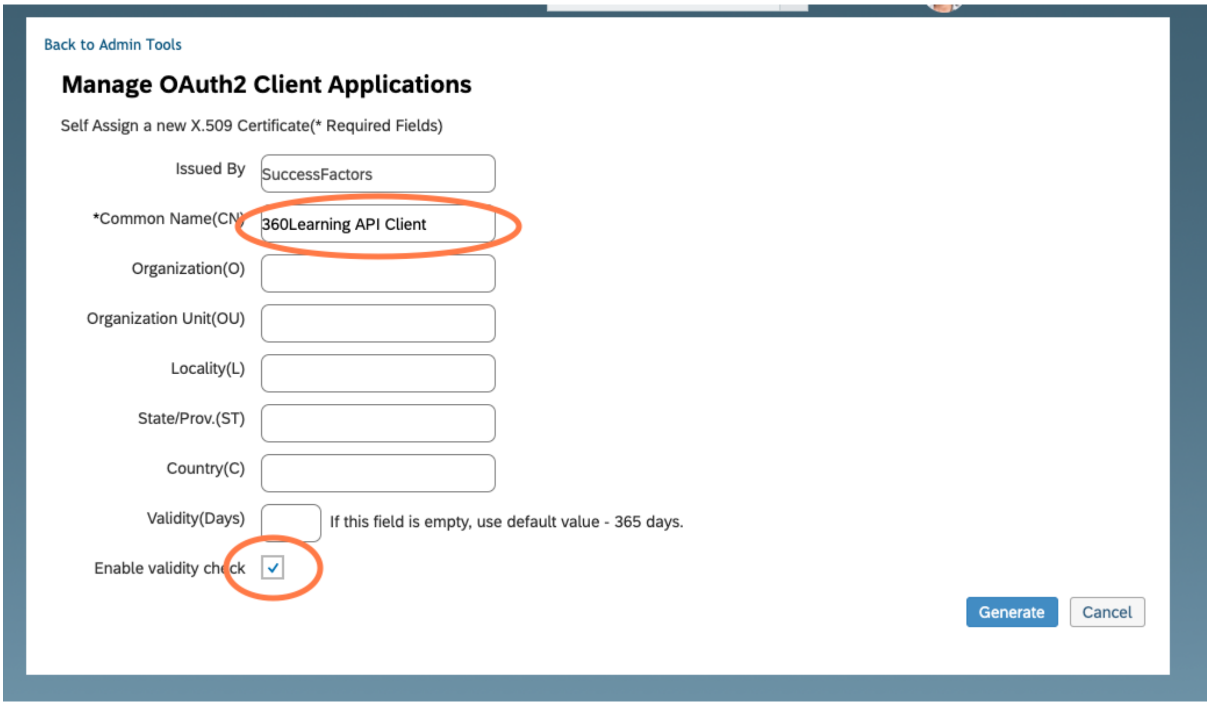


Fill the form:

- Company: Should be pre set
- Application Name: A name to identify the client. Can be **360Learning API Client**
- Application URL: This field is not really used. You can use **<bizXUrl>/idp/token**

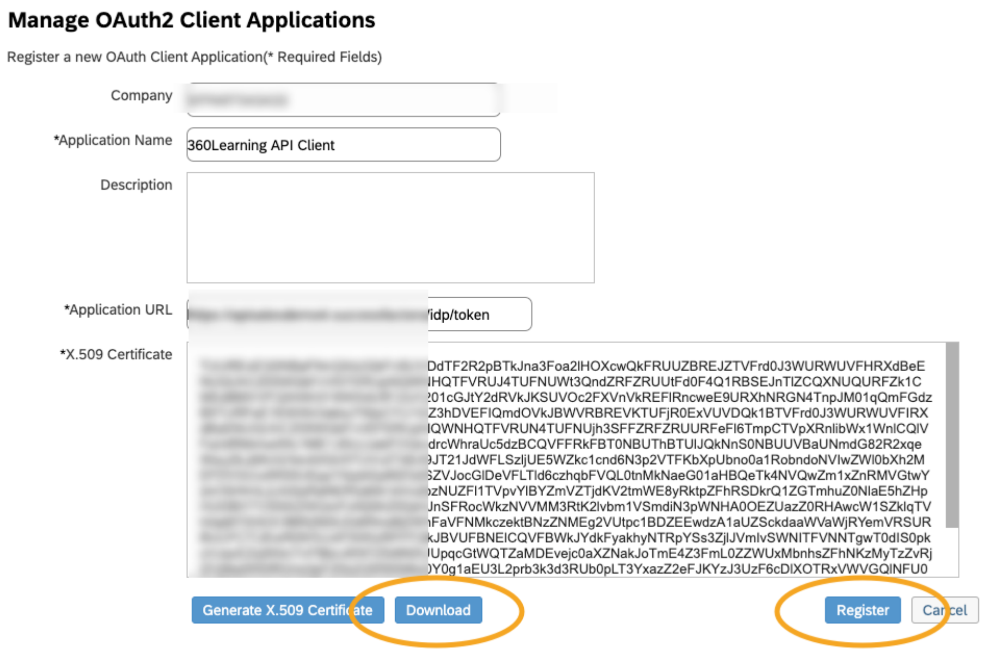
Click on **Generate X 509 Certificate.**

You should see the following screen:



- Only the Common Name (CN) is required, a good practice is to use the same name as in the previous screen.
- Check **Enable Validity Check**

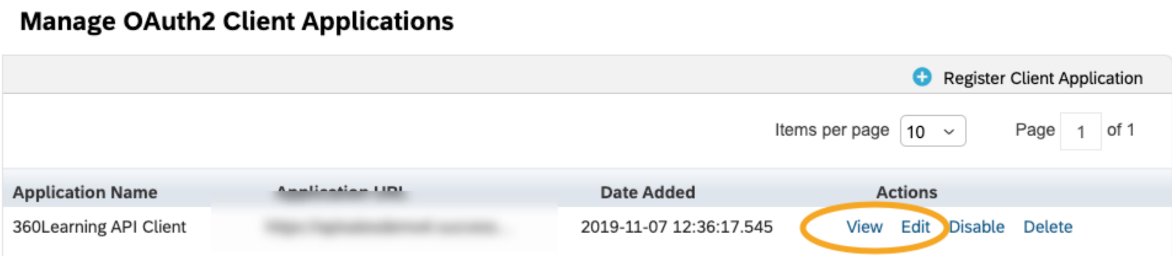
Click on **Generate.**
You will be taken back to the previous screen with the Certificate filled in.



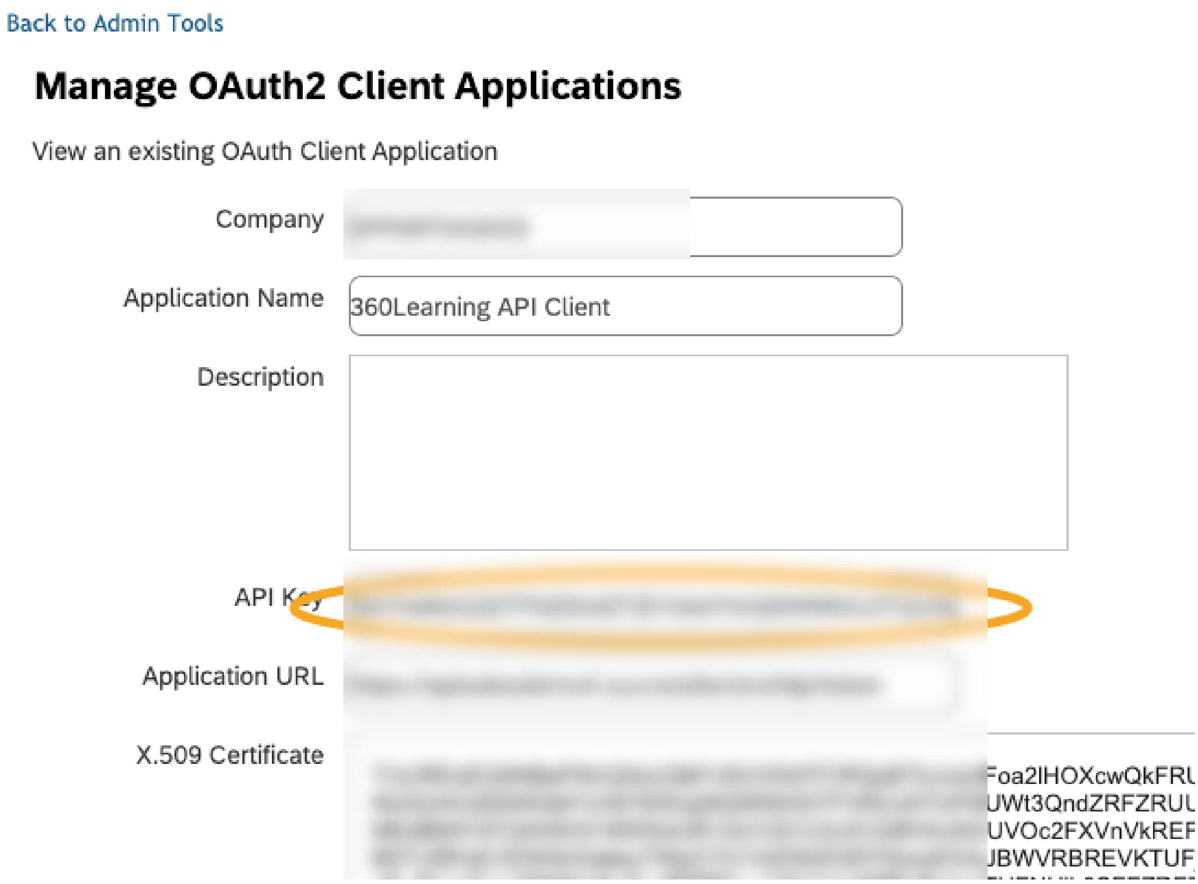
- Click on **Download**. The system will download a certificate file called **Certificate.pem**. Save this file for later.
- **Important note**: you will be presented with the opportunity to download the certificate only once. If you click later on **Generate** accidentally, the certificate will be regenerated and existing integrations using the previous certificate will be broken.
- Click on **Register**

You will be taken back to the list of Applications.

- Click on **View** to see the details of the Client Application you just created



You will now be able to see your API Key.



- Copy the **API Key**

2.5 Send the credentials to 360Learning

Open the **Certificate.pem** file with a text editor.
The **private_key** is the text
between
-----BEGIN ENCRYPTED PRIVATE KEY-----
and
-----END ENCRYPTED PRIVATE KEY-----
, it usually finishes with "=".

Send to your 360Learning solution architect:

- The **private_key**
- the **user_id** of the user who performed the previous operations
- your <**bizXUrl**>. Ideally, provide the API url for your platform which should be in [this list]()
- the **api_key** from the previous step
- your **company_id**. You can find your company_id at the end of your bizXUrl when you are logged in as admin. Example: https://hcm12preview.sapsf.eu/sf/admin?bplte_company=**SFPARTXXXXXX**

3. SuccessFactors LMS setup guide

In order to allow access to the SuccessFactors LMS API, another API user needs to be set up.

3.1 If you have never used the LMS API

Please review the document called “Creating a Technical or API User” on your SAP support portal.

3.2 Create a Role with privileges to access the API

- Login to your LMS instance as an administrator.
- Go to **Learning Administration / System Administration / Security / Role Management**
- Click **Add New** on the top right

Fill the form in the next screen:

- Role ID: **360LEARNING API**
- Security Domain: **PUBLIC**
- Role Type: **Admin**
- Click on **Add**

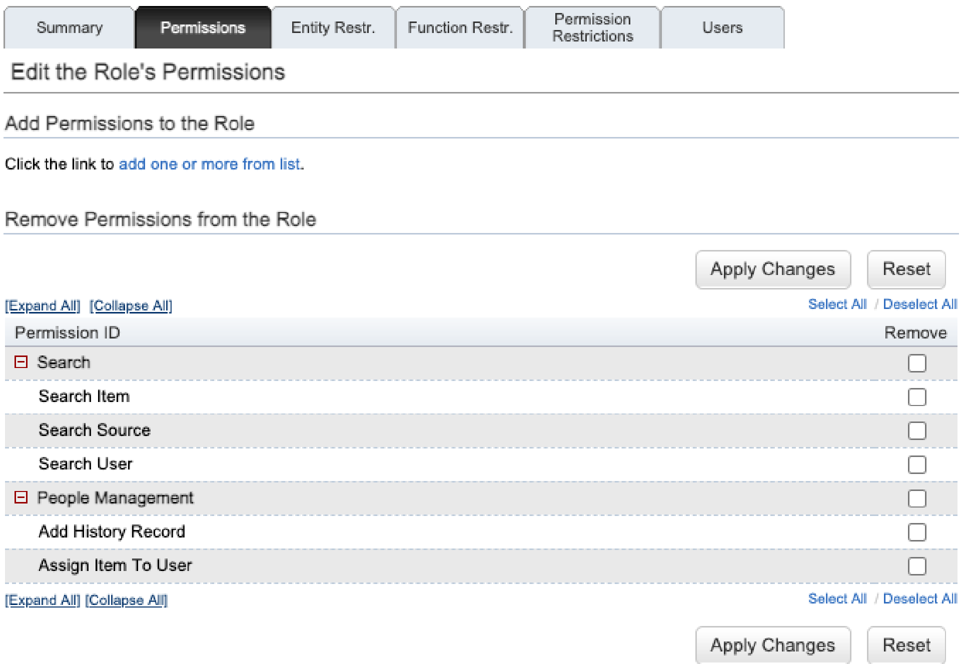
3.3 Add workflows for the Role

In the next screen, select the **Permissions** tab and click on the link **add one or more from list**.

You are going to add the required rights to the 360Learning API client.

- Unfold the **People Management** category and select
  - **Add History Record**
  - **Assign Item to User**
- Click **Add**
- Unfold the **Search** category and select
  - **Search Item**
  - **Search Source**
  - **Search User**
- Click **Add**

If you unfold **User Management** and **Search**
You should see this:



3.4 Create a specific Admin User

The purpose of this new admin user will be to access the API for the 360Learning connector.

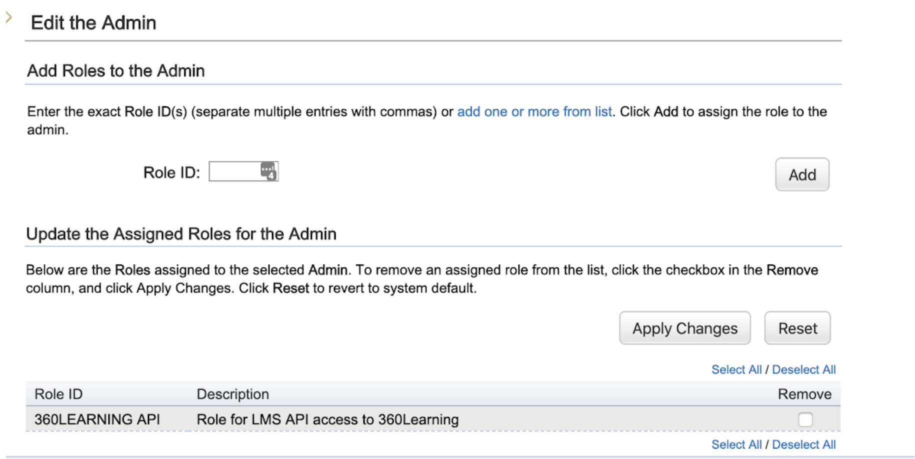
- Go to **Learning Administration / System Administration / Security / Administrators**
- Click on **Add New**
- Admin ID: please use **OCN_360LEARNING_ADMIN**
- Password: select a password of your choice, store it. It will NOT be required by 360Learning.
- Click on **Add**

3.5 Associate the Role to the new Admin user

Click on the tab **Assigned Roles / Add one or more from list**

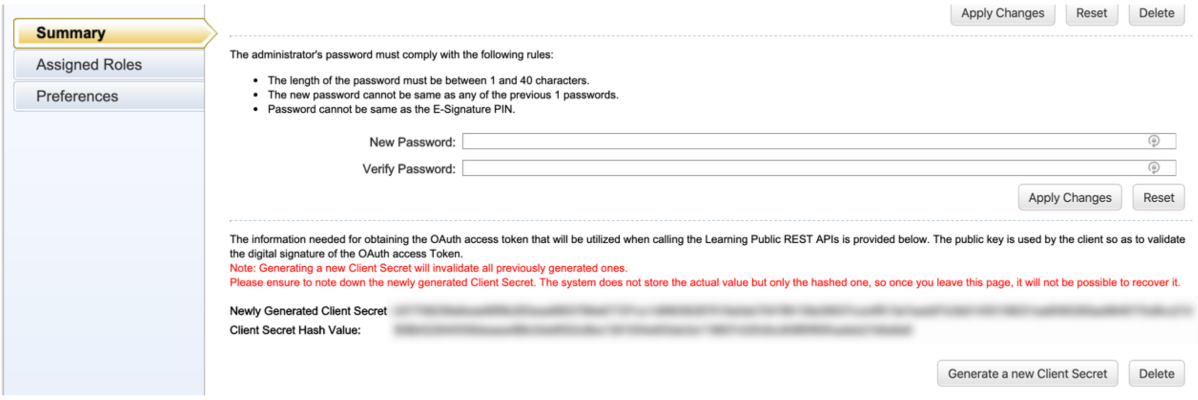
- Search for the previously created Role
- Select the previously created **360LEARNING API** Role
- Click on **Add.**

You should now see the Role added to the user.



- Switch back to the **Summary** tab to generate a new client secret
- Click on **Generate a new Client Secret**

After generating the client secret the bottom of the screen should like this:



Important: Store the **client_secret**. It will not be displayed again.
If in the future you generate the client secret again, it will break the existing integration and you will need to send the new client secret to 360Learning.

3.6 Create the 360Learning provider in the LMS administration

The connector between 360Learning and SuccessFactors uses the Open Content Network scheme.
You need to create 360Learning as a Content Provider in your LMS.

3.6.1 Create the name of the content provider

- In the LMS Learning Administration go to **Learning Administration / References / Manage Labels / Labels**.

- Click **Add New**.
- In Label Type type LABEL.
- Click **Next**.
- In Label ID type the name of the provider for the courses: it can be **360Learning** or a name of your choice (you can only use numbers, letters and the '.' character).

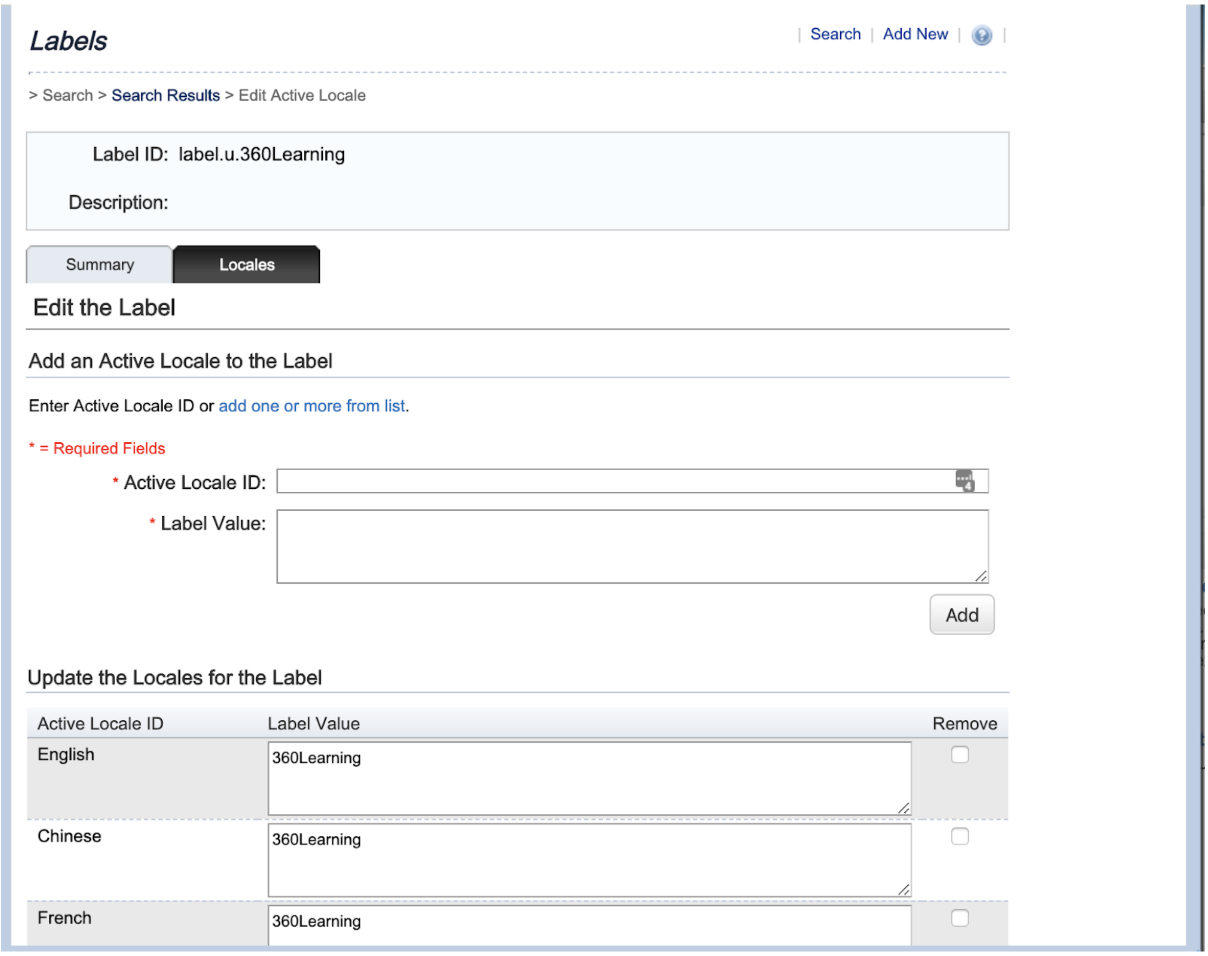
We will call **providerID** this ID you just created. All courses IDs will start with this ID.
Examples:

- 360Learning
- my.digital.academy

- In Description, type a description of your label to help other administrators maintain it.
- In the Use By dropdown select **Both**.
- Select Assign to All Locales.
- Click **Add**.

- Go to the **Locales** tab.

For each Active Locale ID, type the name you would like displayed for the providerID you created in the previous step.



- Click **Apply Changes**

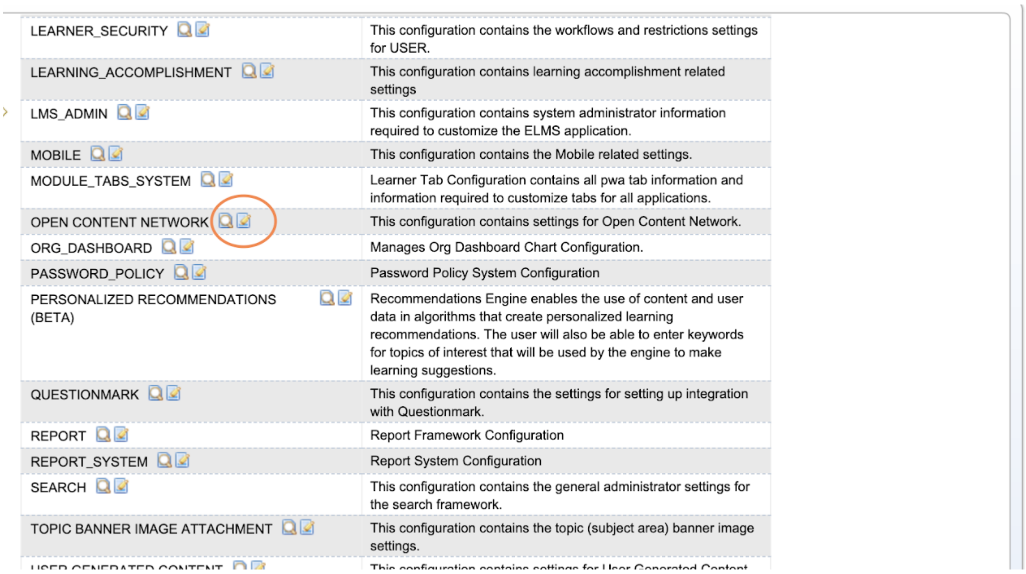
3.6.2 If you don't have any Open Content Network

Please read this [guide]() carefully and reach out to your SAP implementation partner if you run into any issues.

3.6.3 Configure the Content Provider

Go to **Learning Administration / System Administration / Configuration / System Configuration**

Edit the OPEN CONTENT NETWORK configuration



LEARNER_SECURITY	This configuration contains the workflows and restrictions settings for USER.
LEARNING_ACCOMPLISHMENT	This configuration contains learning accomplishment related settings
LMS_ADMIN	This configuration contains system administrator information required to customize the ELMS application.
MOBILE	This configuration contains the Mobile related settings.
MODULE_TABS_SYSTEM	Learner Tab Configuration contains all pwa tab information and information required to customize tabs for all applications.
OPEN CONTENT NETWORK	This configuration contains settings for Open Content Network.
ORG_DASHBOARD	Manages Org Dashboard Chart Configuration.
PASSWORD_POLICY	Password Policy System Configuration
PERSONALIZED RECOMMENDATIONS (BETA)	Recommendations Engine enables the use of content and user data in algorithms that create personalized learning recommendations. The user will also be able to enter keywords for topics of interest that will be used by the engine to make learning suggestions.
QUESTIONMARK	This configuration contains the settings for setting up integration with Questionmark.
REPORT	Report Framework Configuration
REPORT_SYSTEM	Report System Configuration
SEARCH	This configuration contains the general administrator settings for the search framework.
TOPIC BANNER IMAGE ATTACHMENT	This configuration contains the topic (subject area) banner image settings.

Add the following code, **replacing <providerID> by the providerID you created in 3.5.1**

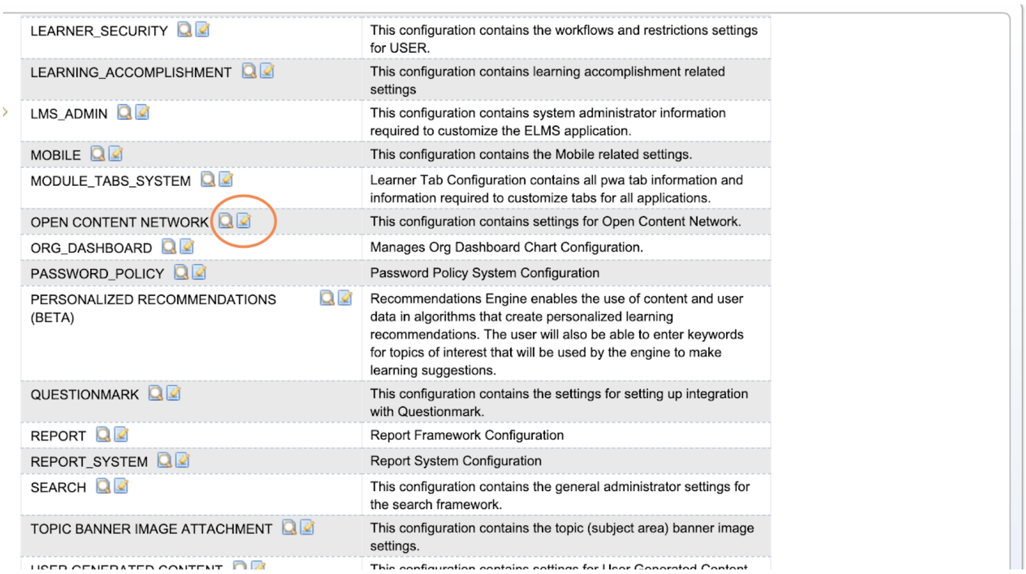
```
# Configuration for providerID integration
providers[<providerID>].enabled=true
providers[<providerID>].name=<providerID>
providers[<providerID>].label=label.u.<providerID>
providers[<providerID>].baseLaunchUrl=https://app.360learning.com/home/
providers[<providerID>].pricingModel=
defaultValues.markCompleteOnLaunch[<providerID>]=false
```

And click **Apply Changes**

3.6.4 Identify the item type for OCN content

Go to **Learning Administration / System Administration / Configuration / System Configuration**

Display the OPEN CONTENT NETWORK configuration



Search for the following configuration, and note the **itemType**:

```
#This configuration sets the item type.
defaultValues.itemType[default]=MOOC
```

In this exemple, the **itemType** is **MOOC**

3.7 Send the credentials to 360Learning

Send the following informations to your 360Learning solution architect:

- **lms_tenant_url** : the url of your SuccessFactors LMS tenant
- **SuccessFactors Company ID** : the company_id of your SuccessFactors LMS tenant
- **Client ID**
- **client_secret :** obtained in 3.4
- **user_id**: of the previously created user, it should be **OCN_360LEARNING_ADMIN**
- **providerID**: the providerID created in step 3.5.1
- **itemType**: as identified in step 3.6.4

You can find the LMS Company ID and Client ID in **Learning Administration > Configuration > OAuth Token Server**

4. Your test instance

You will perform your tests on a test instance of your 360Learning platform.
Your solution architect will provide you with your test instance url.

Example:

- Your production platform url is: **`myacademy.360learning.com`**
- You test instance url will be something like: **`myacademy.360mooc.com:14532`**

This test instance is a snapshot of your production instance at the moment it was created. It lives separately from your production instance.

- Any modification done to your production instance is **not** reflected in the test instance
- Any modification done to your test instance is **not** reflected in the production instance
- The test instance does **not** send any email

Important note

The connector on the test instance does not behave exactly like the connector in the production environment:

- daily synchronization scripts need to be run manually by 360Learning

This means that all users / courses / program sessions synchronisations **need to be launched manually by 360Learning** (instead of being launched automatically at night).

Your Solution Architect will be able to perform the synchronization at your request.

You will see that you will still be able to test most features on the connector.

5. Test scenarios

5.1 Credentials check and setup

After you have completed chapter 3, your 360Learning Solution Architect will check that the credentials are properly set and that 360Learning has the required accesses to both SuccessFactors BizX and LMS.

The solution architect will then launch the initial synchronization of users, courses and program sessions.

5.2 Users synchronization

Check that the information from users in BizX are reflected in 360Learning.

User can be found in **Learning Administration / People / Users**

5.3 Courses and Sessions initial synchronization

All ACTIVE courses and path sessions should have been synced.

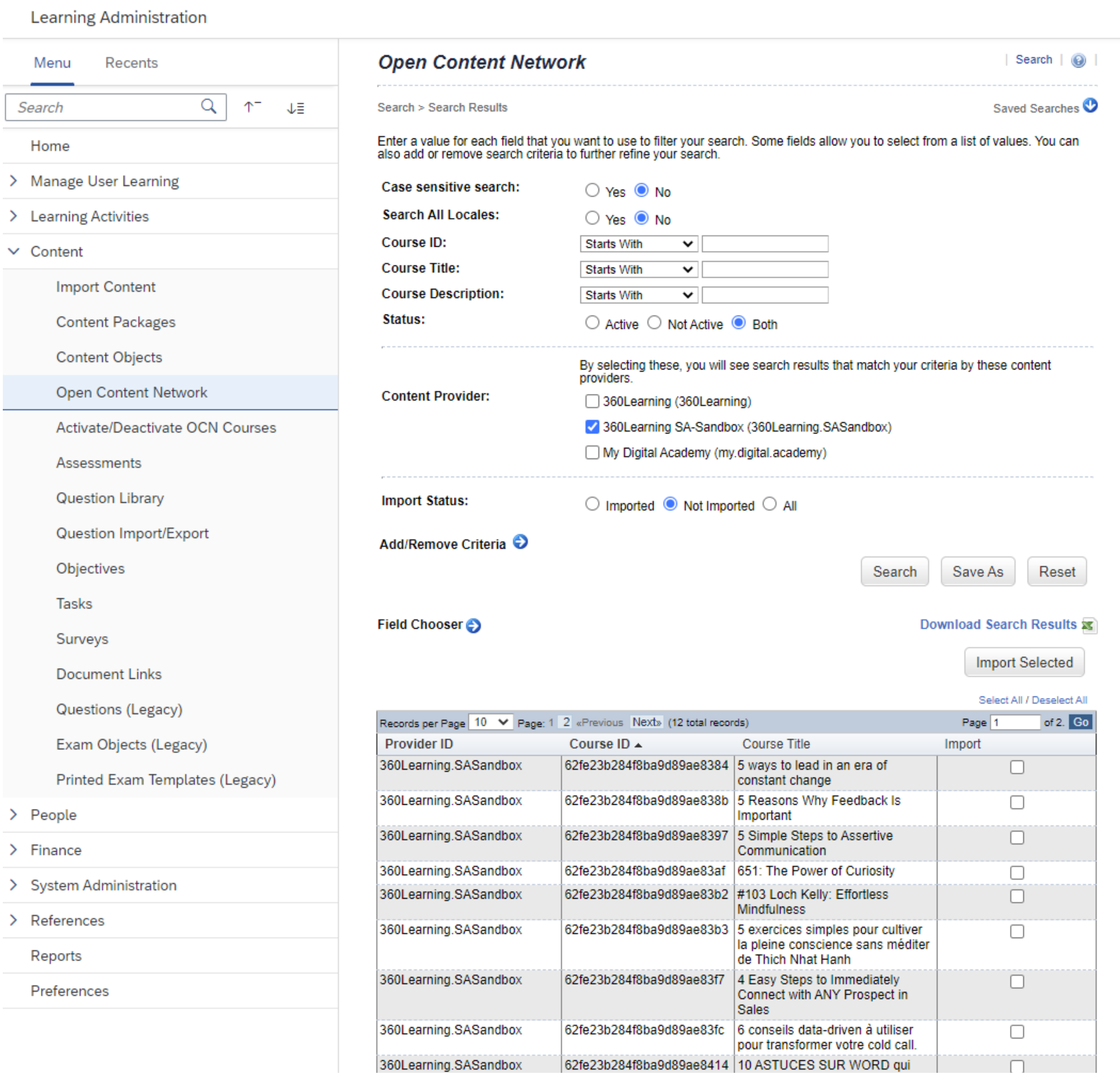
Once an item is synced, the SuccessFactors LMS admin will be able to import this item.

5.3.1 Courses and Path Sessions import

Important: an operation needs to be performed in SuccessFactors to completely import the learning items.

- This is necessary for a SuccessFactors administrator to actually use the learning items
- This is necessary for the 360Learning connector to send Learning History

In Learning Administration > Content > Open Content Network

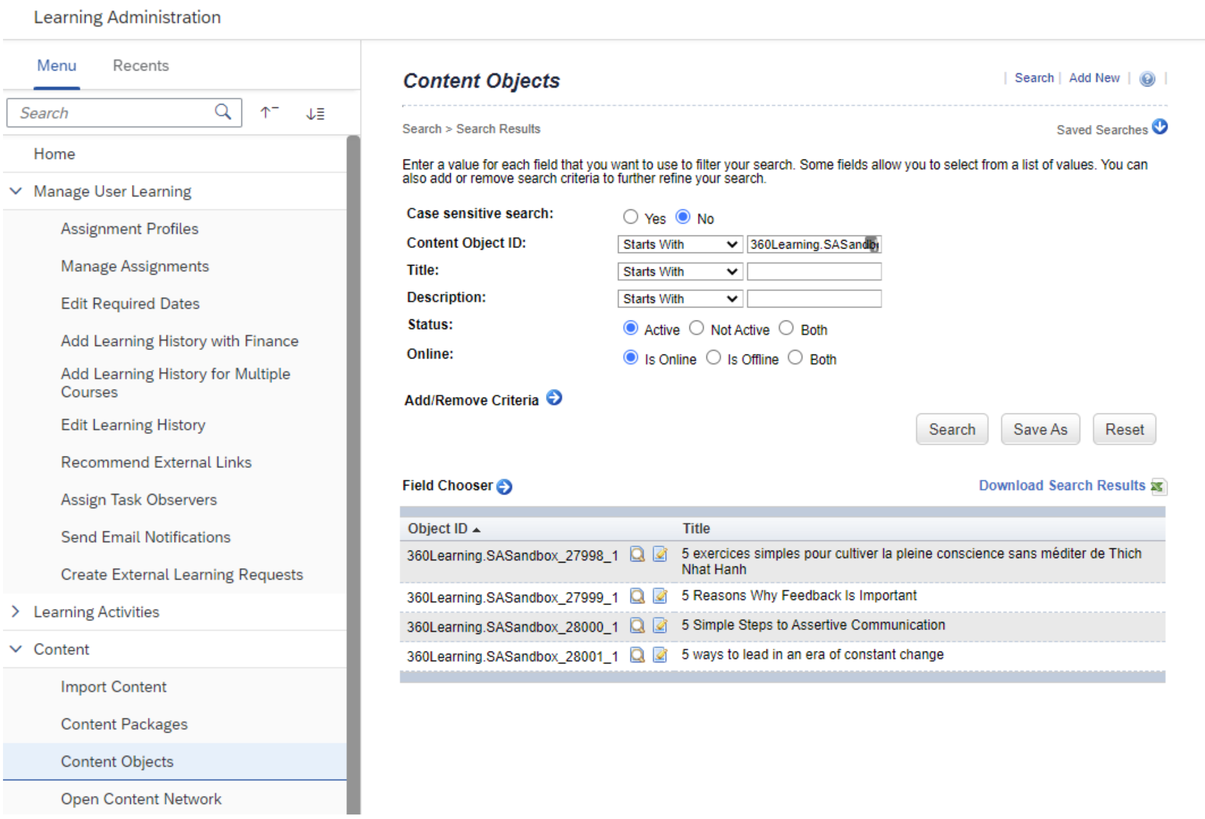


- Select Status: Both
- Select Content Provider: the **providerID** you defined in 3.5.1
- Select Import Status: Not imported
- Click **Search**

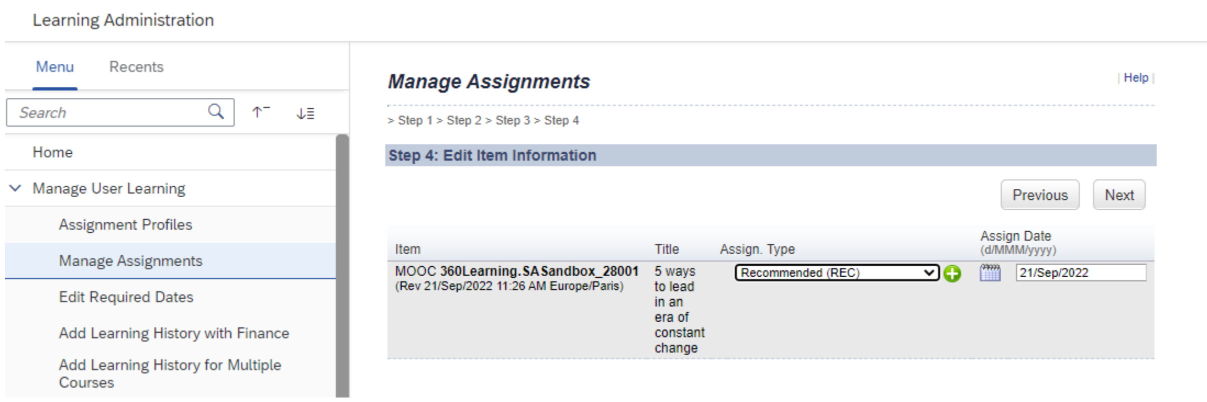
The learning items not yet imported are displayed.
You have the ability to import all or a subset of the items.

- To import all items, Select All then **Import Selected**

Your learning items are now accessible in SuccessFactors.
They can be seen in **Learning Administration / Content / Content Objects:**



In SAP SuccessFactors, Items can then be assigned to users in Learning **Administration / Manage User Learning / Manage Assignments:**



You can now check that:

- the information available in SuccessFactors match the information in 360Learning
- Learning items can be added to a catalog in SuccessFactors and then searchable by a user
- A user can launch a 360Learning course or session from SuccessFactors
- If a user was not assigned to a session in 360Learning, he will automatically be assigned to the session when coming from SuccessFactors
- **Important**: the previous feature will be seamless in production, but on the test docker a specific action is required. You need to manually update the launch url of

the item by adding the docker number. Example: **`myacademy.360learning.com`** must be replaced by **`myacademy.360learning.com:14526`**

5.4 Courses and Sessions creation

When you create a new Course or Session it will be uploaded into SuccessFactors.

- In the production connector, the sync will be done once a day at night
- In your test instance, it will require a manual launch by your solution architect

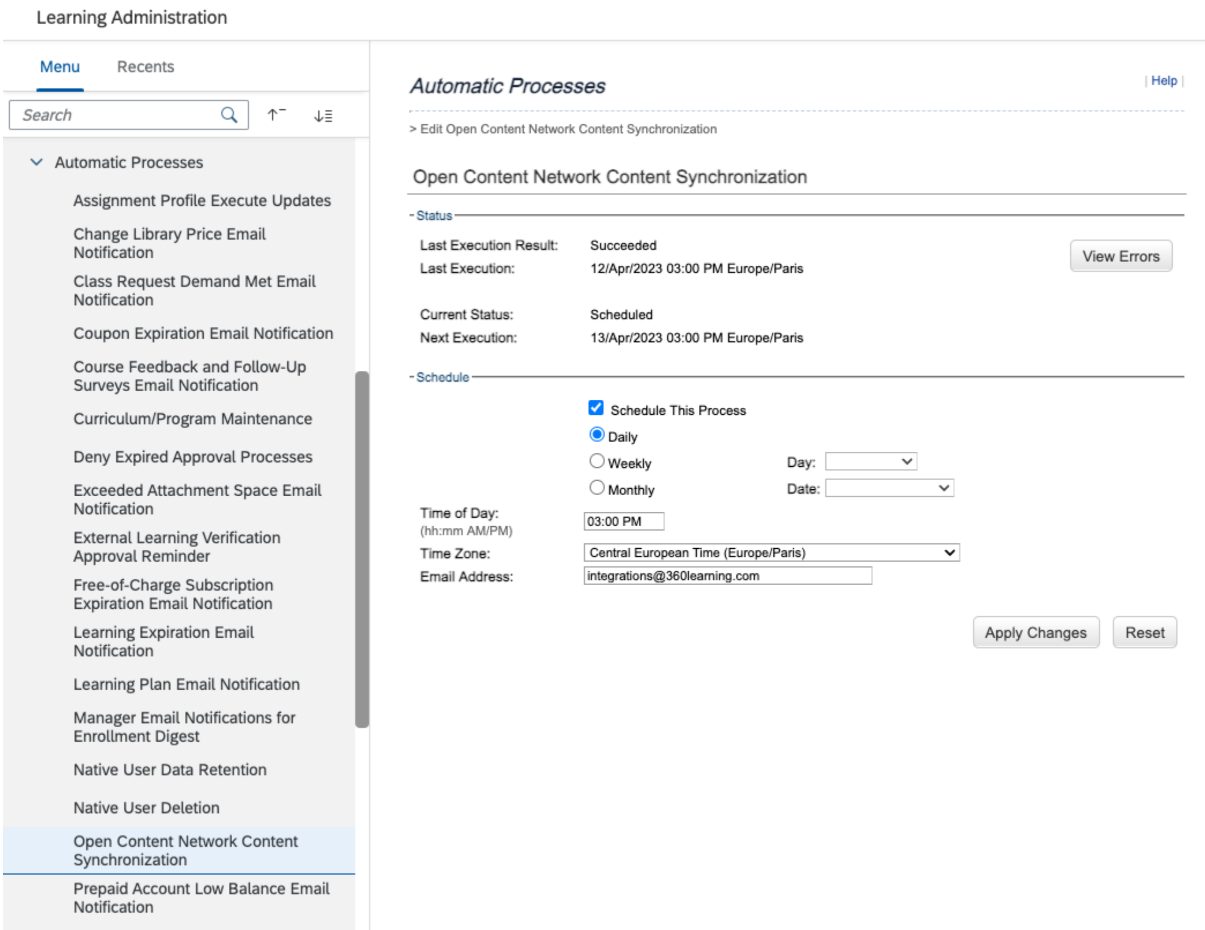
When performing the operation described in 5.3.1 you should see the newly created courses and be able to import them.

5.5 Courses and Sessions update

When you update (change of title, change of dates, change of status, ...) a learning item in 360Learning, the modification is synced into SuccessFactors LMS.

Important: an operation needs to be performed in SuccessFactors to completely update the learning items that have been previously imported from OCN

In Learning Administration > System Administration > Automatic Processes > Open Content Network Content Synchronization



- Schedule the process, if not scheduled
- Select a daily synchronization

The imported OCN learning items will be updated when this process is completed.

Again

- In the production connector, the sync will be done once a day at night
- In your test instance, it will require a manual launch by your solution architect

But you don't need to perform the operation described in 5.3.1, the update is done through the automatic update set in 3.7