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# SAP SuccessFactors HCM Cloud Automated Demo Request Tool

User Guide v 2.4

March 14th, 2017

## Contents

<b>DOCUMENT REVISION HISTORY:</b> .....	<b>2</b>
<b>1 INTRODUCTION</b> .....	<b>3</b>
<b>2 SAP SUCCESS FACTORS HCM CLOUD OPERATIONS PORTAL</b> .....	<b>3</b>
<b>3 PARTNER PRE-REGISTRATION</b> .....	<b>3</b>
<b>4 REQUEST RESTRICTED ACCESS - DEMO</b> .....	<b>4</b>
<b>5 GENERATE YOUR DEMO INSTANCE</b> .....	<b>6</b>
<b>6 LOG IN TO YOUR BIZX DEMO INSTANCE</b> .....	<b>12</b>
<b>7 LOG IN TO PROVISIONING</b> .....	<b>12</b>
<b>8 MANAGE YOUR DEMO INSTANCES</b> .....	<b>13</b>
8.1.1 Extend Demo .....	14
8.1.2 Refresh Demo.....	14
8.1.3 Delete Demo.....	14
<b>9 ONB</b> .....	<b>15</b>
<b>9.1 Manual Configuring ONB Endpoints in BizX Provisioning:</b> .....	<b>15</b>
<b>9.2 Trouble-shooting ONB</b> .....	<b>17</b>
9.2.1 In Chrome you do this by accessing Settings and then advanced settings .....	17
9.2.2 In Internet Explorer you do this by accessing Internet Options, Security.....	20
9.2.3 Reset Password in ONB Administration .....	23
<b>9.3 Older Instances</b> .....	<b>25</b>
<b>10 WFA</b> .....	<b>26</b>
<b>11 MAP YOUR PROVISIONING ID TO AN EXISTING DEMO INSTANCE</b> .....	<b>27</b>

### DOCUMENT REVISION HISTORY:

Author	Date	Version	Notes
Partner Cloud Operations	6/12/2015	V1.0	Initial Release
Partner Cloud Operations	6/25/2015	V1.01	Updated Restricted Access Request Form

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Partner Cloud Operations	7/02/2015	V1.02	Updated to reflect availability of the 1502 master
Partner Cloud Operations	7/17/2015	V1.03	Added additional warnings regarding importance of using the correct Provisioning ID when making Demo Requests
Partner Cloud Operations	10/30/2015	V1.04	Introduction of RAR-Demo for streamlined processing of Provisioning accounts
Partner Cloud Operations	01/12/2016	V1.05	Introduction of automated provisioning ID check
Partner Cloud Operations	7/28/2016	V1.06	Regionally-based demo masters deployed
HCM Cloud Operations	9/26/2016	V2.0	New Platform launch. Demo Request Tool now optionally includes JAM.
HCM Cloud Operations	01/06/2017	V2.1 & V2.2	Updates regarding currently available demo masters
HCM Cloud Operations	03/02/2017	V2.3	Addition of WFA and ONB module to NGD demo masters
HCM Cloud Operations	03/14/2017	V2.4	Expanded WFA Usage Guidelines

## 1 INTRODUCTION

The SuccessFactors HCM Cloud automated Demo Request Tool is available to Partners, SAP Sales Solution Consultants, Customer Support, Professional Services, and SAP Trainers and training administrators. Each demo instance, or tenant, is a clone of a reference Master, running in a live environment that is configurable by the user. The automated Demo instance Request Tool (DRT) streamlines the creation of SuccessFactors HCM demo instances for both users and Operations and supports overall inventory management in order to efficiently manage SAP data center resources.

## 2 SAP SUCCESS FACTORS HCM CLOUD OPERATIONS PORTAL

The Demo Request Tool is accessed via the HCM Cloud Operations Portal

(<https://hcmcloudops.successfactors.com/>). The portal can be accessed with your SAP-ID login credentials.

## 3 PARTNER PRE-REGISTRATION

Use of the Demo Request Tool requires pre-registration of the Partner organization. If your company has not been registered, when you navigate to the Tool, you will be advised to submit a ticket via the **“CONTACT US”** link under the **SUPPORT** tab. Select Request Type **“Demo Instance Issue”** and type **“Demo Registration Request”** in the Notes. Your Partner status will be validated by the Ops Service Delivery team and your company registered to use the tool.

#### 4 REQUEST RESTRICTED ACCESS - DEMO

All demo instances are hosted in access controlled data centers. A Provisioning User ID is required for each data center (and specific environment: Test, Demo, or Production within the data center). Log-in to the HCM Cloud Operations Portal and submit a Restricted Access Request - Demo (RAR-Demo) to receive access credentials to manage demos in a specific Data Center(s) Demo environment(s).

Once you submit your request you should receive an email confirmation immediately, and a BizX Provisioning ID/Username and Password for the selected data center(s) demo environment will be provided to you via email within 5 business days.



## Access Information for your SAP SuccessFactors HCM Suite Provisioning Account (Demo Environment)

Greetings!

You have been provided access to the SuccessFactors Business Execution Suite (BizX) performance manager interface in the following data center demo environment:

DCX demo environment URL: XXX

Please use the below credentials to log in:

Note: If you already have a provisioning account **associated with your email address** in the data center environment specified above, a new account has not been created. You can login with your existing User ID and Password. If you have forgotten your password, submit a Password Reset request found on the [Operations Requests](#) page of the HCM Cloud Ops portal.

User ID: XXX  
Password: XXX

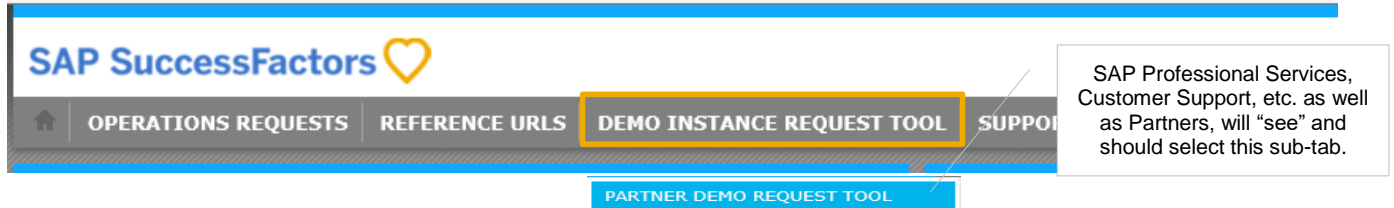
When you log in to the BizX UI for the first time you will be prompted to reset your password. Please ensure a secure password is set following the below rules.

When you log in to the BizX UI associated with a data center demo environment, you will be prompted to reset your password. Passwords are independently set for each data center/environment, however you may choose to set the same password for multiple data centers. **IMPORTANT:** User name and Password credentials are specific to the data center, and environment (e.g., Demo, Preview, or Production) within the data center, and must be managed accordingly.

**You will need to enter your Provisioning ID when you generate your demo instance via the automated Demo Request Tool.** After the demo instance has been generated, the tool will automatically map this provisioning ID to the instance.

## 5 GENERATE YOUR DEMO INSTANCE

After logging-in to the HCM Cloud Operations portal, navigate to the Demo Instance Request Tool tab.



Note: If your partner company is not yet registered to use the Demo Request Tool you will be advised to submit a ticket via the CONTACT US link under SUPPORT to initiate registration.

**Step 1:** To generate a new demo instance, click on “New Request”.



**Step 2:** Complete the User Information pop-up form. The form will be pre-populated with your name, SAP S-User ID, email address, and phone number. NOTE: Managers will have the option of entering another user’s information here in order to make the request on their behalf.

User Information

Complete the form below to begin.

Note: demo instances created via this tool are not configured for SAP Learning Hub Academy courses.

FIRST NAME

LAST NAME

SAP USER ID

EMAIL

PHONE

**Step 3a:** The subsequent (example) screen will display the currently active demo masters. Review the descriptions if you need guidance regarding which master to select. **Scroll to see all available masters.**

Select a Version

<input type="radio"/> BPmaster1608	This instance includes all configuration of the SAP SuccessFactors rapid-deployment solutions without any employee data. The instance is a 1:1 copy of the Best Practices pre-configured instance which is also copied for customers. For more details check the SAP Best Practices Explorer at <a href="https://rapid.sap.com/bp/#/browse/categories/cloud/areas/people">https://rapid.sap.com/bp/#/browse/categories/cloud/areas/people</a> .
<input type="radio"/> NGD 1608 in Pre-Preview	BestRun demo master in the DC4 Pre-Preview (aka Enablement Release) environment. DC4 is the primary environment for developing integrations, and/or demoing proof of concepts. Quarterly product releases are deployed to the DC4 demo environment ~6 weeks before DC2 & DC8 demo environments. Countries represented in this master include: Australia, Brazil, Canada, China, Germany, France, the United Kingdom, & the United States of America, which are the 8 countries built out with the deepest level of employee demo data. Includes Jam.
<input type="radio"/> NGD 1611	BestRun NGD demo master. Countries represented in this master include: Australia, Brazil, Canada, China, Germany, France, the United Kingdom, & the United States of America, which are the 8 countries built out with the deepest level of employee demo data. In addition to the BizX core, this master includes Jam in DC2. In DC8, this master includes the BizX core, Jam, and WFA.
<input type="radio"/> PEmas2015v1	SuccessFactors Perform and Reward for SMALL BUSINESS. Attention: this is not a complete SuccessFactors instance and should be used only with your SMB prospects.

Reference the “Current Masters” document on the Demo Request Tool “home page” for additional detail.

**Step 3b:** Select a demo master version.

The Data Center(s) in which that particular master is available will display.

**Step 4:** If the master is available in more than one data center, select a data center.

**Step 5:** Enter your Provisioning User ID, and click “Submit”. Your Provisioning User ID is typically your email address and is provided, along with a default password, as a response to your [Restricted Access Request \(Demo\)](#).

Select a Version

<input type="radio"/>	-	which is also copied for customers. For more details check the SAP Best Practices Explorer at <a href="https://rapid.sap.com/bp/#/browse/categories/cloud/areas/people">https://rapid.sap.com/bp/#/browse/categories/cloud/areas/people</a> .
<input type="radio"/>	NGD 1608 in Pre-Preview	BestRun demo master in the DC4 Pre-Preview (aka Enablement Release) environment. DC4 is the primary environment for developing integrations, and/or demoing proof of concepts. Quarterly product releases are deployed to the DC4 demo environment ~6 weeks before DC2 & DC8 demo environments. Countries represented in this master include: Australia, Brazil, Canada, China, Germany, France, the United Kingdom, & the United States of America, which are the 8 countries built out with the deepest level of employee demo data. Includes Jam.
<input checked="" type="radio"/>	NGD 1611	BestRun NGD demo master. Countries represented in this master include: Australia, Brazil, Canada, China, Germany, France, the United Kingdom, & the United States of America, which are the 8 countries built out with the deepest level of employee demo data. In addition to the BizX core, this master includes Jam in DC2. In DC8, this master includes the BizX core, Jam, and WFA.
<input type="radio"/>	PEmas2015v1	SuccessFactors Perform and Reward for SMALL BUSINESS. Attention: this is not a complete SuccessFactors instance and should be used only with your SMB prospects.

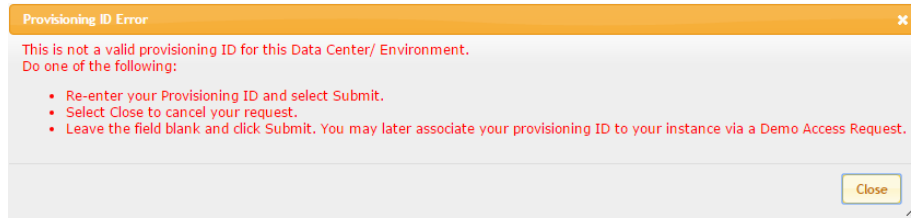
Select a Datacenter:

DC2 Amsterdam  DC8 Ashburn

Provisioning User ID :

First select a demo version. The data centers in which the demo is available will display. Select one of the listed data centers. Enter a valid Provisioning ID for the data center you select. If you do not have a provisioning ID specific to that data center, you will need to request one via the [Restricted Access Request - Demo](#) form, under the OPERATIONS REQUESTS tab of this portal. A provisioning ID will be provided within 5 business days, at which point you can return to this tool and generate your demo instance(s).

The Provisioning User ID will be validated for the particular Data Center Demo environment. If it is not an active Provisioning ID for the specified Data Center Demo environment the following screen will display.



If Provisioning ID validation is successful, a request is sent to the Service Provider Cockpit (SPC) for automated provisioning of the requested demo instance. During this time the Demo Request Tool will indicate the status of the demo as “In Process”.

The automated processing will take less than 15 minutes for BizX-only instances (non-NGD instances).

When the BizX creation is complete, the status will be updated and indicate “Completed” and an automated message will be sent to the instance owner.

Version	Data Center	Company ID	Type	Expiring On	Status
NGD 1608 in DC2 or DC8	DC2 Amsterdam	SFPART009334	BestRun	06-Apr-17 23:59	Completed
NGD 1608 in DC2 or DC8	DC8 Ashburn	SFPART009304	BestRun	05-Apr-17 23:59	Deletion in process
PEmas2015v1	DC8 Ashburn	SFPART009005	PE V.1	20-Mar-17 23:59	Deleted

Demo instances generated from the **NGD masters** also include Jam, WFA, and ONB by default.

After requesting an instance, the tool will automatically create all the requisite components. You can view the status by clicking on the row.

My Instances	
My Company Instances	
< BACK	
First Name	Mike
Last Name	Antongiovanni
Demo Version	Test Master
Demo Description	Test master created from BestRun Demo - NGD II - N America Regional Master.
Demo Type	Test Master BestRun Demo
Data Center	DC8 Ashburn
Created On	26-Jan-2017 13:20
Expiring On	26-Jan-2018 23:59
BizX Instance Status	In Process
JAM Instance Status	In Process
ONB Instance Status	In Process
WFA Instance Status	In Process

As the various modules are readied their status will change to Completed. After some time (typically 20 – 30 minutes) all modules will be completed.

<b>BizX Instance Status</b>	Completed
<b>JAM Instance Status</b>	Completed
<b>ONB Instance Status</b>	In Process
<b>WFA Instance Status</b>	Completed

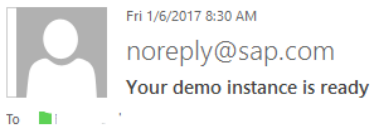
**Notes:**

The ONB module will subsequently require additional configuration (outside of the Demo Request Tool). Refer to section 9 of this document for full details.

Tips regarding usage of the shared WFA instance are outlined in Section 10.

You will receive an email notification of completion which will include:

- The unique identifiers of your demo instance (Company ID), e.g.: SFPART00000
- The demo instance url
- Default User Name and Password
- Link to the BizX Provisioning UI in the specified data center



A request has been received to create a demo instance of the “NGD 1608 in DC2 & DC8” master.

Original Requester :  
Company :

The demo instance is currently being prepared and will be ready momentarily.

Demo Instance "Company ID" : SFPART00930

After 30 minutes from receiving this email, you may use the credentials below to verify access.

Company Link : <https://pmsalesdemo8.successfactors.com/login?company=SFPART00930>  
Company User Name :  
Company Password :  
Expiry Date : Apr 5 2017 11:59PM

Please take note of the **Expiry Date** above. Your instance will be automatically deactivated on this date. Your instance will subsequently be permanently deleted in two weeks if not extended.

To extend your instance contact your demo administrator or the original requester of this instance. HCM Cloud Ops Portal users may also extend the instance via the [Demo Request Tool](#).

**SuccessFactors Business Execution Suite Provisioning Interface:**

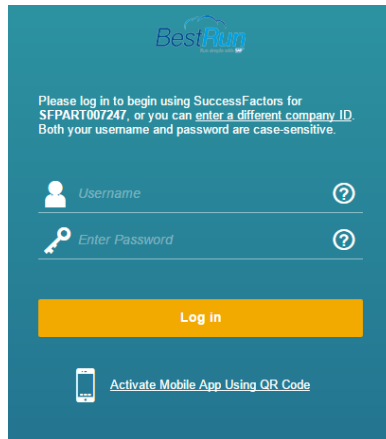
To perform backend configuration of your demo instance via the SuccessFactors Business Execution Suite Provisioning interface, go to the link below:  
[https://pmsalesdemo8.successfactors.com/provisioning\\_login](https://pmsalesdemo8.successfactors.com/provisioning_login)

- If you previously requested access to this environment via a Restricted Access Request, your UserName/Provisioning ID and Password is included in the email you received with subject line: "Initial login information for your SuccessFactors Provisioning Account". If you require a Password Reset, submit a Provisioning Account Password Reset on the [Operations Request](#) page of the HCM Cloud Ops Portal.
- If you have any issues accessing the above URLs please submit a ticket to the HCM Cloud Ops Service Desk via the Contact US form under the Support tab.

Information on [SF and OData APIs](#) and product information can be found in the SAP Help Portal. For enabling the **SAP HANA Cloud Platform extension package** for SuccessFactors, please follow the steps in this [configuration guide](#)

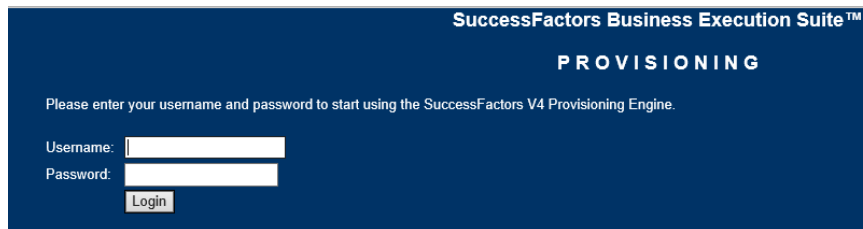
## 6 LOG IN TO YOUR BIZX DEMO INSTANCE

Within your browser, navigate to the “Company Link” URL provided in the “Your demo instance is ready” email. To begin working with your demo instance, enter the assigned default Use Name and Password supplied in the email.



## 7 LOG IN TO PROVISIONING

Provisioning access to a demo instance enables you to perform backend configuration of the instance via the SuccessFactors Business Execution Suite Provisioning interface. Note that login credentials are different than those of the demo instance itself.



Again, reference “Your demo instance is ready” email. The URL provided is unique to a particular data center and environment, e.g., Sales Demo environment in DC8  
 ([https://pmsalesdemo8.successfactors.com/provisioning\\_login](https://pmsalesdemo8.successfactors.com/provisioning_login))

- Enter Username (from the email) and Password (either as originally supplied or your new password if you have re-set it).
- **IMPORTANT:** Username and Passwords are data-center specific. If you change your password for one data center it does **not** change your password for any other data center.
- Upon log-in, all of your provisioned demo instances in that data center will be displayed.

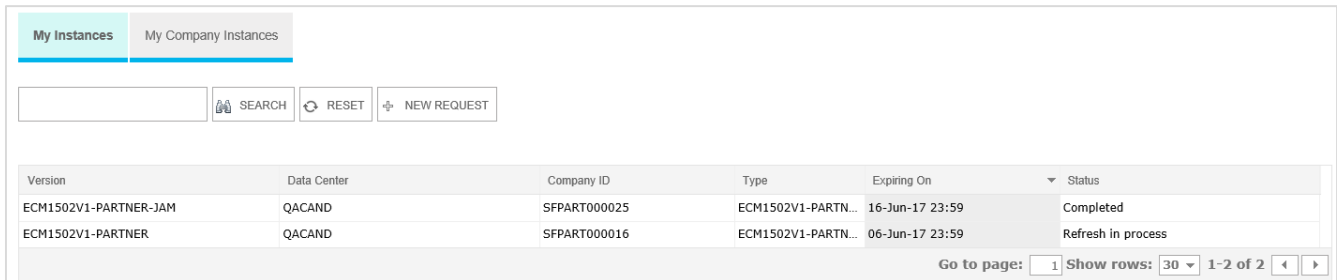
- Double click the Company ID (e.g., SFPART000) to open:



## 8 MANAGE YOUR DEMO INSTANCES

Managers and Users are able to manage (Extend, Refresh, or Delete) their demo instances.

Navigate to the Demo Request Tool to view a list of your demo instances. Double-click a listing in the Demo Manager grid.



Select the action you would like to take against the demo instance.



8.1.1 **Extend Demo**

- This will extend the expiration of the demo instance. Select “Extend Demo”, modify the Expiration date and select “Extend” to complete the request.

8.1.2 **Refresh Demo**

- This will send a request to SPC to reset the demo instance with the default schema. During this time the Status field of the demo on the main interface will indicate the status as in process.

8.1.3 **Delete Demo**

- This will send a request to SPC to have the provisioning account that is associated to the demo un-associated and the demo deleted from the environment. The main interface will indicate that the demo has been deleted and managing functions are no longer available against that demo.

9 **ONB**

(Available 3/16/2017 in DC8 only)

9.1 **Manual Configuring ONB Endpoints in BizX Provisioning:**

The automated instance creation process through DRT initiates the basic handshake between BizX and ONB. There are some manual steps required to complete the connection. These steps are outlined in this section.

1. Log into provisioning for your BizX instance. Each data center has a unique access point

DC2: [https://salesdemo.successfactors.eu/provisioning\\_login](https://salesdemo.successfactors.eu/provisioning_login)

DC4: [https://salesdemo4.successfactors.com/provisioning\\_login](https://salesdemo4.successfactors.com/provisioning_login)

DC8: [https://pmsalesdemo8.successfactors.com/provisioning\\_login](https://pmsalesdemo8.successfactors.com/provisioning_login)

2. and navigate to: → Provisioning → Company ID → Company Settings

When you first log in and view your onboarding settings they will like be similar to the screen shot shown here.

3. Confirm the settings are as follows.

- a. Confirm the “Enable Onboarding” check box is enabled
- b. Confirm the Company ID (Account ID) is listed and is identical to your BizX company ID

4. Enter the manual steps required for a fully functional BizX – ONB integration:

- a. Reenter the Company ID to force provisioning to update the password fields (just change the Company ID slightly and then rekey your specific Company ID).
- b. Change the “Environment” parameter to the appropriate Data Center. For example, if the ONB tenant is in DC8 choose DC8 sales from the “Environment” drop down menu.  
 The valid datacenter values are as follows:
  - DC2 = DC2 Sales
  - DC4 = DC4 Sales
  - DC8 = DC8 Sales
 Note: there are other environments in these data centers so make sure you select the environments noted above
- c. Confirm and/or change the path value to ONBPREM
- d. Enable the additional ONB features as needed. (You may choose the features as seen in the screenshot if needed)
- e. Click on the Save Feature button at the top of the section.

Save Feature

The screenshot shows a configuration window with the following elements:

- Enable Onboarding Application — requires “Enable Generic Objects”, “Version 12 UI framework (Revolution)” and “Enable External ATS-ONB-EC Integration”
  - Enable Onboarding Tour
  - Enable External ATS-ONB-EC Integration
  - Enable MDF-based new hire activity planning (refer to Onboarding Config Guide for details)
  - Enable Pre-Day 1 Experience for new hires
    - Use the Same User ID for Pre-day 1 User and the Employee
    - Make future dated users active after EC hire process
- Enable Offboarding Application — requires “Enable Intelligent Services”, “Enable Generic Objects” and “Enable Employee Central V2”
  - Enable Offboarding EC Writeback-requires “Employee Central V2”

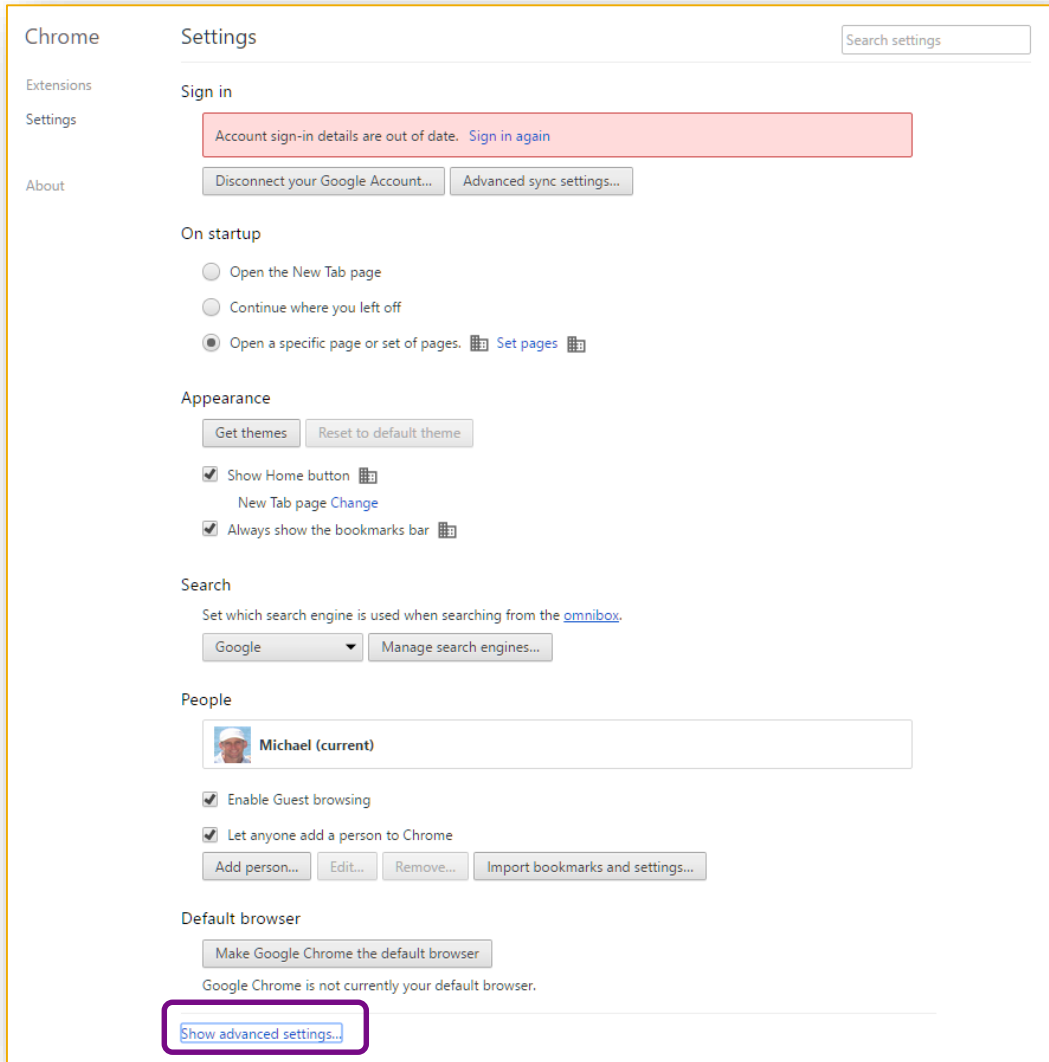
On/Offboarding settings

Account ID	bgtest2	
Environment	DC8 Sales	Path (e.g., ONB, ONBPREM) ONBPREM
WebService URL	https://sales-onboarding8.sapsf.com/ONBPREM	
Enter KMS Web Services credentials		
Username	bgtest2_ws	
Password	bgtest2\$ws	
Enter KMS Rest Web Services credentials		
Username	bgtest2_ws	
Password	bgtest2\$ws	

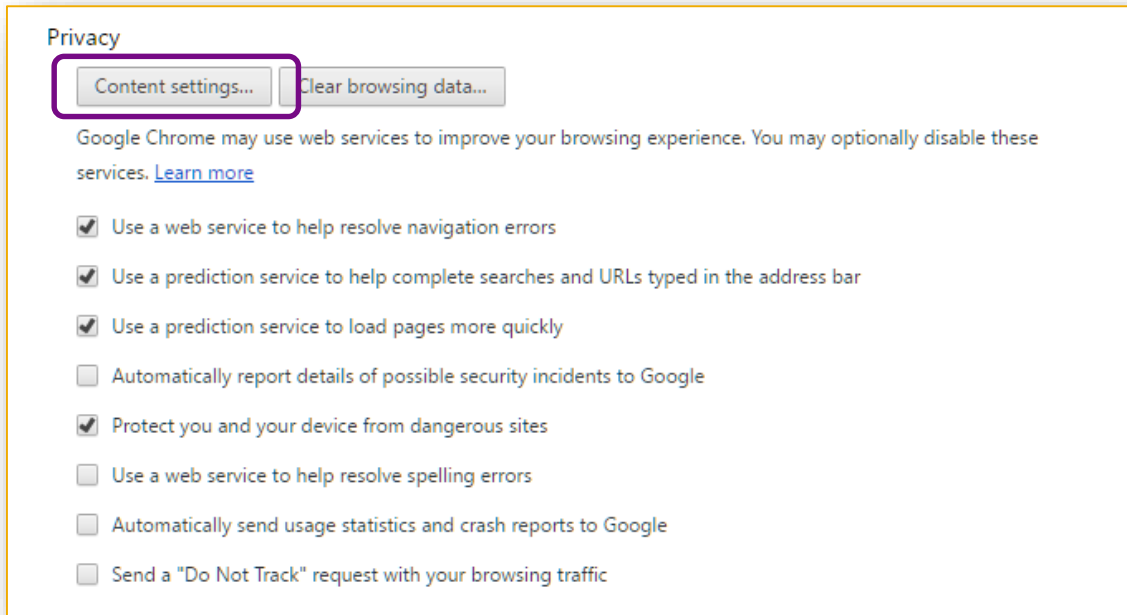
## 9.2 Troubleshooting ONB

If ONB does not load and you receive an error message that mentions cookies or simply a blank screen with no feedback at all it may be a privacy issue and you may need to allow access to a certain SAP resource.

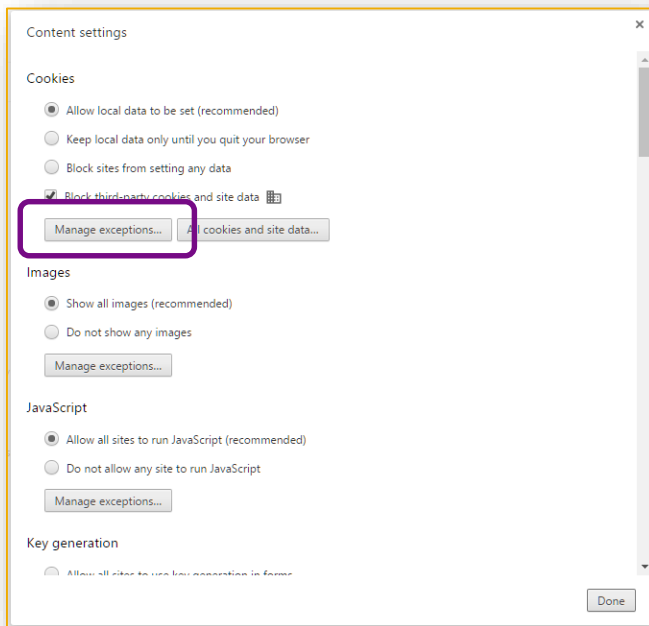
### 9.2.1 In Chrome you do this by accessing Settings and then advanced settings



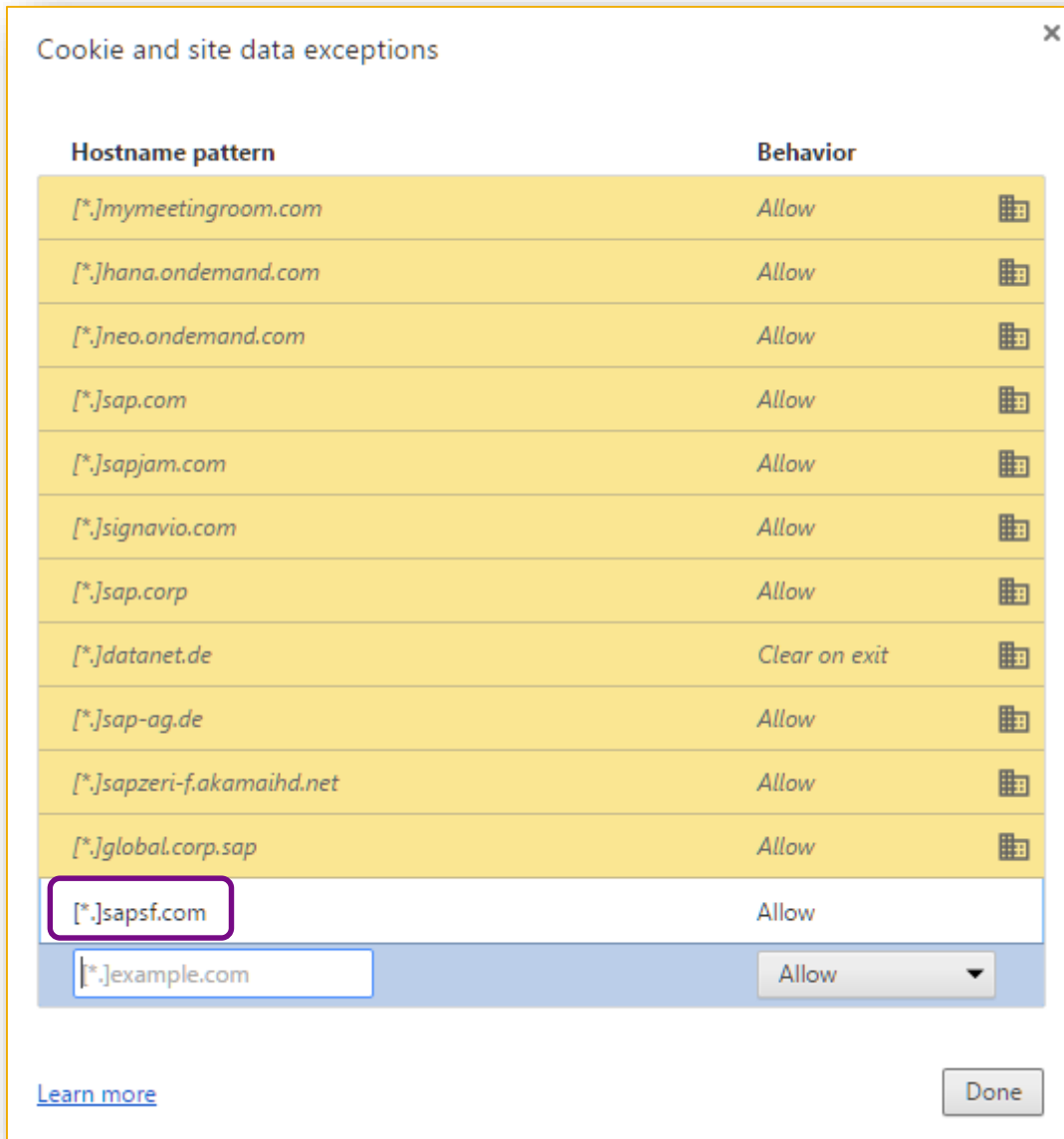
In advanced settings you click on Content settings



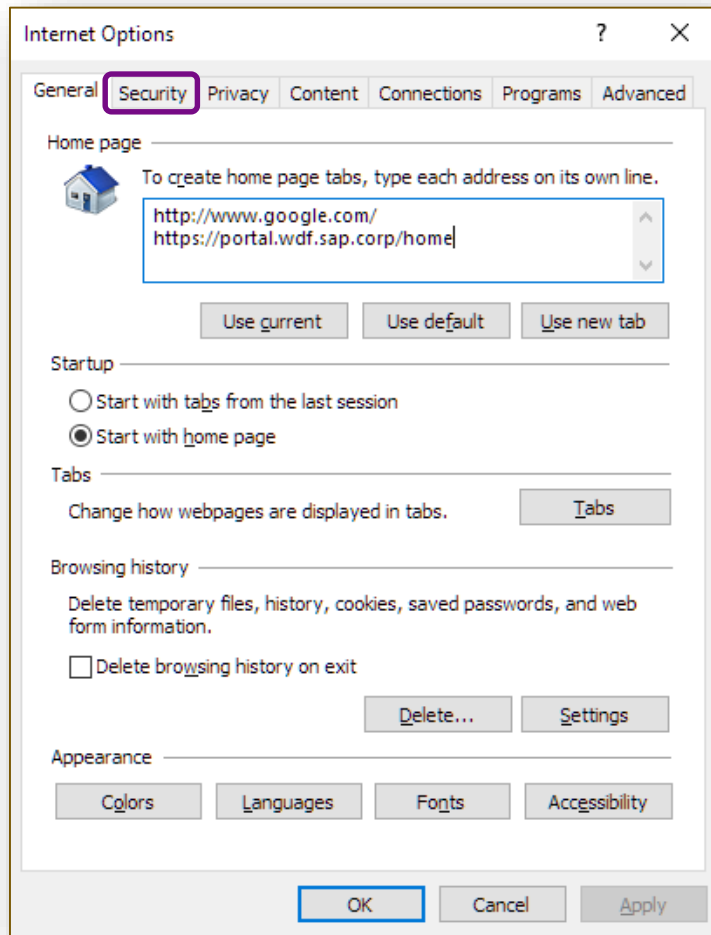
In Content settings you click on the Manage exceptions button in the "Cookies" section



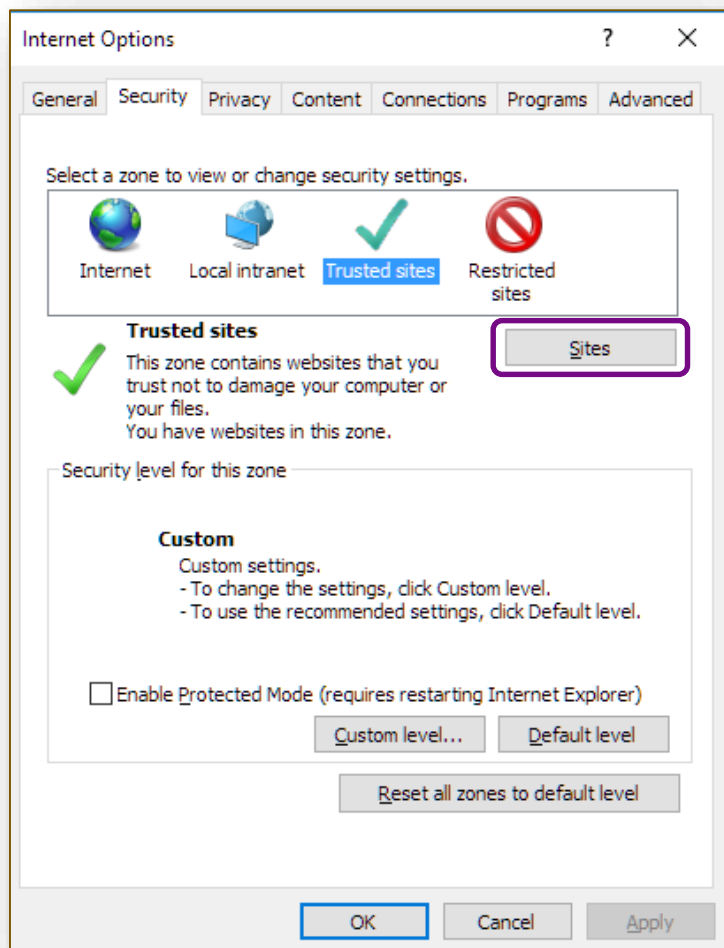
In Manage exceptions you add [ \* . ] sapsf . com to the list of host patterns and click “allow”.



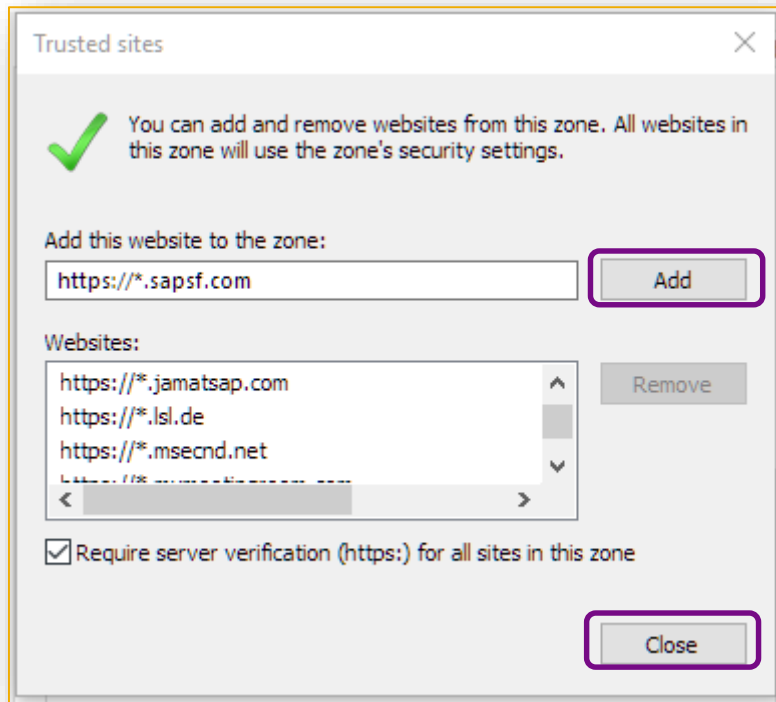
9.2.2 *In Internet Explorer you do this by accessing Internet Options, Security*



### Selecting Sites

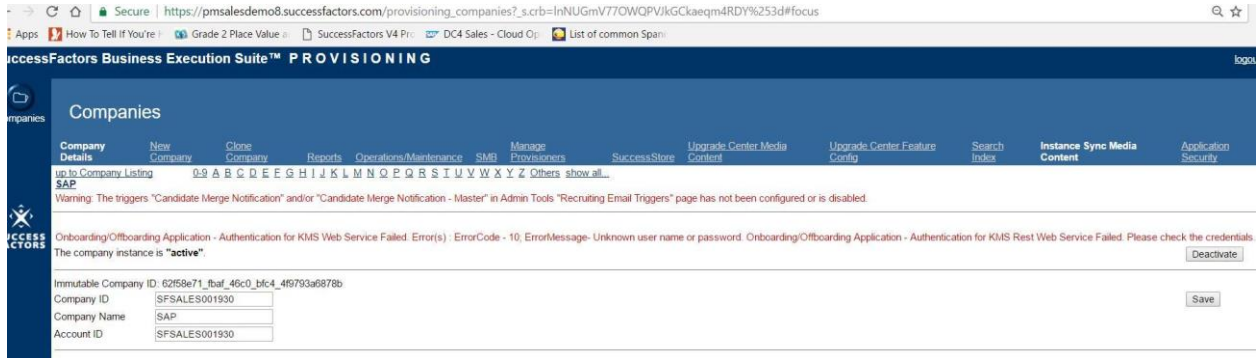


Adding the resource `https://* . sapsf . com` to the list of websites click “Add” and “Close”.



If you run into the Web Service authentication error noted here and shown in the following screenshot,

**Onboarding/Offboarding Application - Authentication for KMS Web Service Failed. Error(s) : ErrorCode - 10; ErrorMessage- Unknown user name or password. Onboarding/Offboarding Application - Authentication for KMS Rest Web Service Failed. Please check the credentials.**



then you need to reset the password in ONB administration with your ONB Super Admin account\*:

### 9.2.3 *Reset Password in ONB Administration*

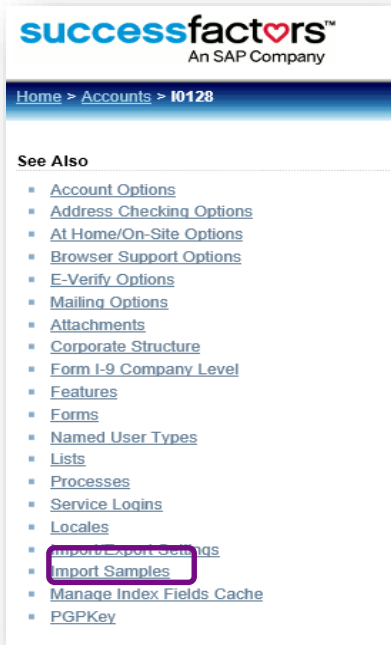
To request ONB Super Admin Access, submit an ONB Super Admin Access Request - Demo via the HCM Cloud Ops portal.

When you have been provided the access credentials, login to ONB Super Admin.

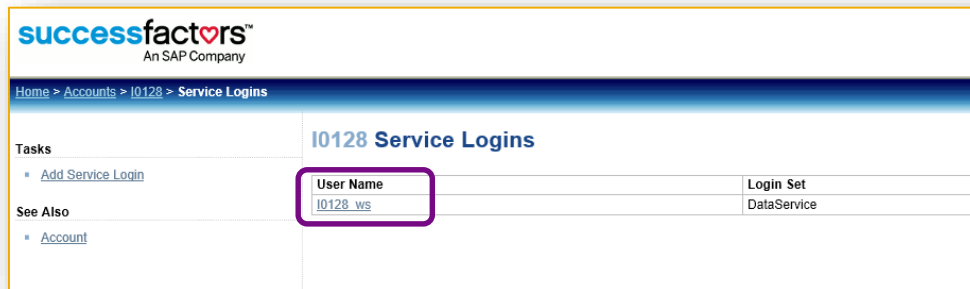
The URLs are:

DC8: <https://sales-onboarding8.sapsf.com/ONBPREM/Administrator/Login.aspx?ReturnUrl=%2fONBPREM%2fadministrator>

Click on your account > Click on the Service Logins link on the left hand section



Click on the Service login link for your ONB instance



Click on Change Password

**I0128\_ws Service Login**

User Name:

Login Set:

Created at: 11/13/2015 5:43:37 AM

Last Login: Never

Password:

Locked out:

Comments:

Enter the password. Password is the "ONBACCOUNTID\$ws" and click update

**I0128\_ws Service Login**

User Name:

Login Set:

Created at: 11/13/2015 5:43:37 AM

Last Login: Never

New Password:

Confirm Password:

Locked out:

Comments:

Login to Provisioning > Re-enter the ONB settings as mentioned above in the Manual Configuring ONB Endpoints in BizX Provisioning steps.

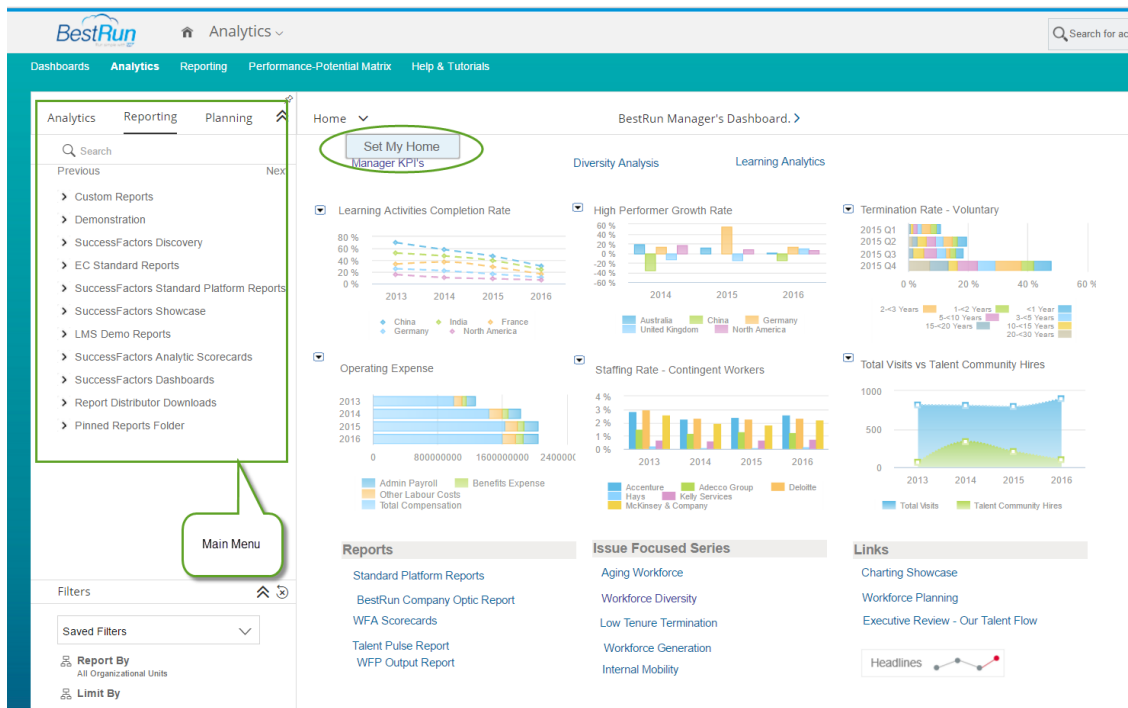
### 9.3 Older Instances

If you have an older demo, or a previously created NGD instance, there is a no process to request and configure ONB.

10 WFA

**IMPORTANT:** Currently available in DC8 only. Analytics is a **shared environment** and changes made in the environment will affect everyone.

- Please be cautious when deleting a report designer page (someone else could be using it).
- When creating a report in ORD please create the report in the “individual workspace” folder under your name
- When adding a report to the main menu please add it under the “Custom Reports” folder in the main menu
- Please do not upload or transfer EC Reports from different environments (It will overwrite the existing reports and could cause an error. Environments are configured differently and the reports may not be compatible.)
- Do not edit another users report – if you would like to edit an existing report please make a copy of it first
- To ensure the menu within analytics stays clean, it is important that we do not create reports on the main menu that are personal or demo specific.
- We suggest that you set your report as the home page of your user. To do this, preview your report and then use the down arrow (next to the Home link) and choose Set My Home. When you then access Analytics, your report will be the first thing that appears.



## 11 MAP YOUR PROVISIONING ID TO AN EXISTING DEMO INSTANCE

Request provisioning access to an **existing** demo by mapping your Provisioning ID to the instance via the Demo Instance Access Request under the Operations Request Forms tab.

The screenshot shows the SAP SuccessFactors Operations Requests page. The 'REQUEST FORMS' tab is selected and highlighted with a green box. Under 'REQUEST STATUS', the 'Demo Instance Access Request' link is highlighted with a green box. The right sidebar shows 'ONB Requests' and 'BizX Requests' categories.

Complete the Demo Instance Access Request (DAR) form as follows:

- In the first three fields, enter your first and last name and email address.
- In the Customer Name field, if applicable enter the name of the customer (or prospective customer) for which you are preparing the demo.
- Enter the "Company ID". The Company ID is a unique identifier of the demo instance. If you were the original requester, the Company ID can be found in the email confirmation you received when the demo was created. Additional demos available for mapping are listed under *Implementation | Demo URLs*.
- Enter your Provisioning ID for the applicable data center (Note: your provisioning ID is likely the same for all data centers, and is typically your email address. You must, however, have submitted a [Restricted Access Request - Demo](#) and received provisioning access to the specific data center/environment in which the demo instance is hosted.) You can view your existing Provisioning Accounts via the [My Provisioning Accounts](#) link on the Operations Request Forms page of the portal.
- Select the Data Center in which the demo instance is housed.

Submit the completed form. The mapping will be completed within 5 business days.