RIZING

The Ultimate Guide to Managing SAP® SuccessFactors® Release Updates

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It’s That Time of Year Again

01

Whether you’re a new user or you’ve been working with SAP SuccessFactors for years, there’s one thing everyone has to go through: bi-annual release updates.

Let’s face it, managing releases takes a lot of effort. You have to learn new features, rethink processes, and update reference materials – all in just a few weeks.

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Time and time again, we've had our customers ask us how to prepare for a new release – sometimes in the last minute. However, the predictability of the release cycle can work to your advantage if you:

- Go in with a strategy
- Have your go-to tools accessible
- Build scheduled habits

We've been working on these for quite some time now, so we've got some tricks up our sleeves.

With that in mind, we created this handy toolkit to share with the SAP Community – so that you have the best tools out there ready in your back pocket for managing the releases to come. Some might be familiar (that's great) and some might be new. Either way, the resources here will make your release management process a whole lot smoother.

Let's jump in.

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The Top 7 Tools to Manage your SAP Release Updates

02

To make sure your life is as easy as possible, we've equipped every tool-related page with the same structure.

You can familiarize with what the tool looks like with the visual screenshot, get the gist of its benefits with the written description and if you're in a rush, note the key takeaways with the "too long, didn't read" section (or as we like to call it - the TLDR).

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1

SAP Customer Community Site

The **SAP Customer Community Site** should be your home base for release updates. Within this site you'll find everything including quick links to resources and the Product Updates Blog, which provides targeted content for each release cycle.

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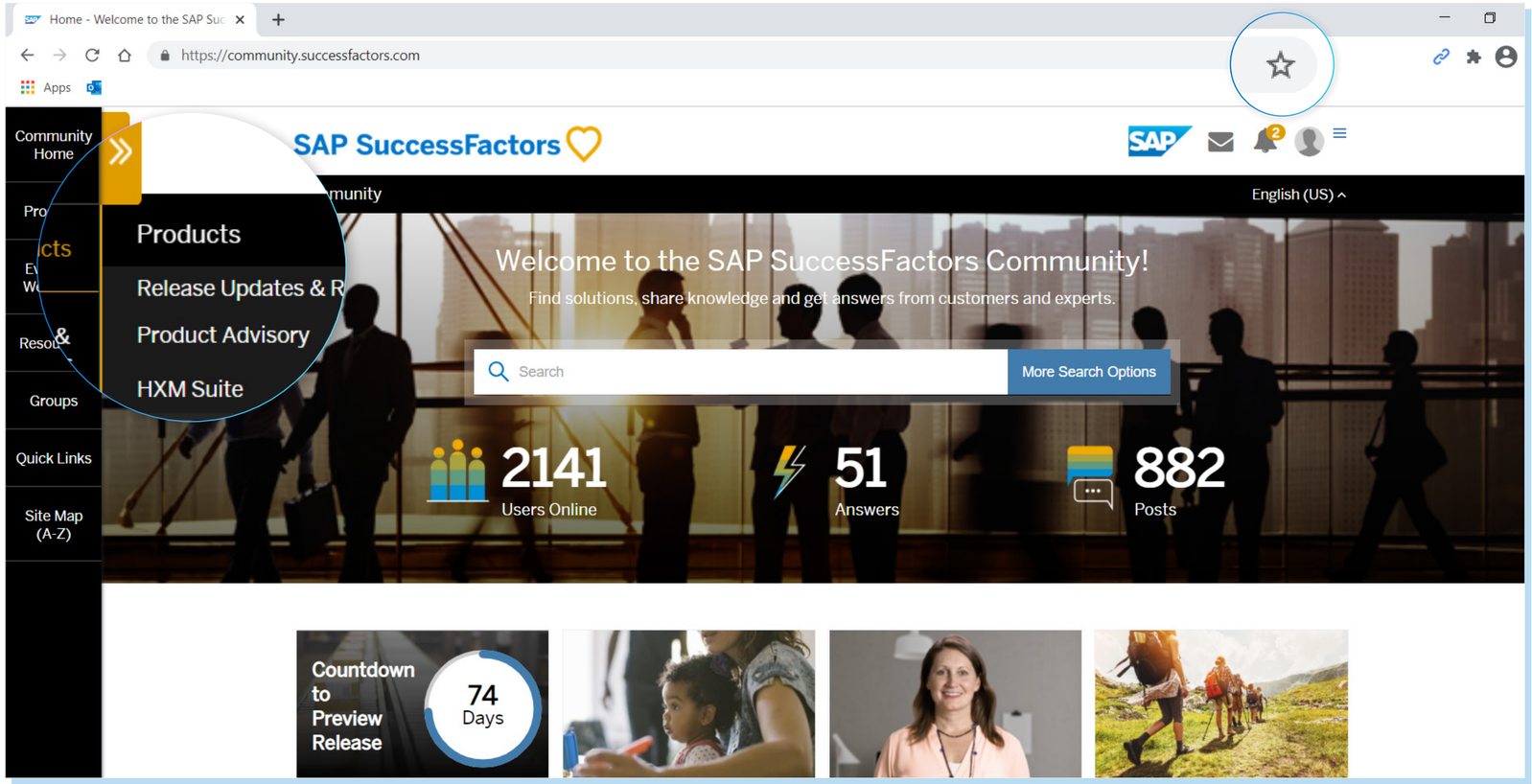

The best part about the SAP Customer Community site is (intuitively) the community. There's a lot of action from the user community in the comments throughout the site, especially around release season. We like to check in every few days to see what people are talking about and how SAP is responding.

Bookmarking this page is a must for easy access. It's an even better idea to subscribe to it so that you receive notifications whenever there is notable new content.

THE TLDR

What it is
Community of users and SAP experts offering resources and advice

Best time to use
During prep, preview and prod

Location
SAP Customer Community Site → Products → Release Updates & Roadmap

Do I need an S-ID?
Yes

Subscribe for updates?
Yes

Pro tip
Check in from time to time to keep up with what's on other users' minds in the comments, and look out for insight in responses from SAP.

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2

SAP What's New Release Viewer

The **What's New Release Viewer** is a game changer when it comes to managing your releases. It provides a complete overview of all of the SAP SuccessFactors features and functional updates. It allows you to see everything in one place without you having to go through content that isn't useful for you.

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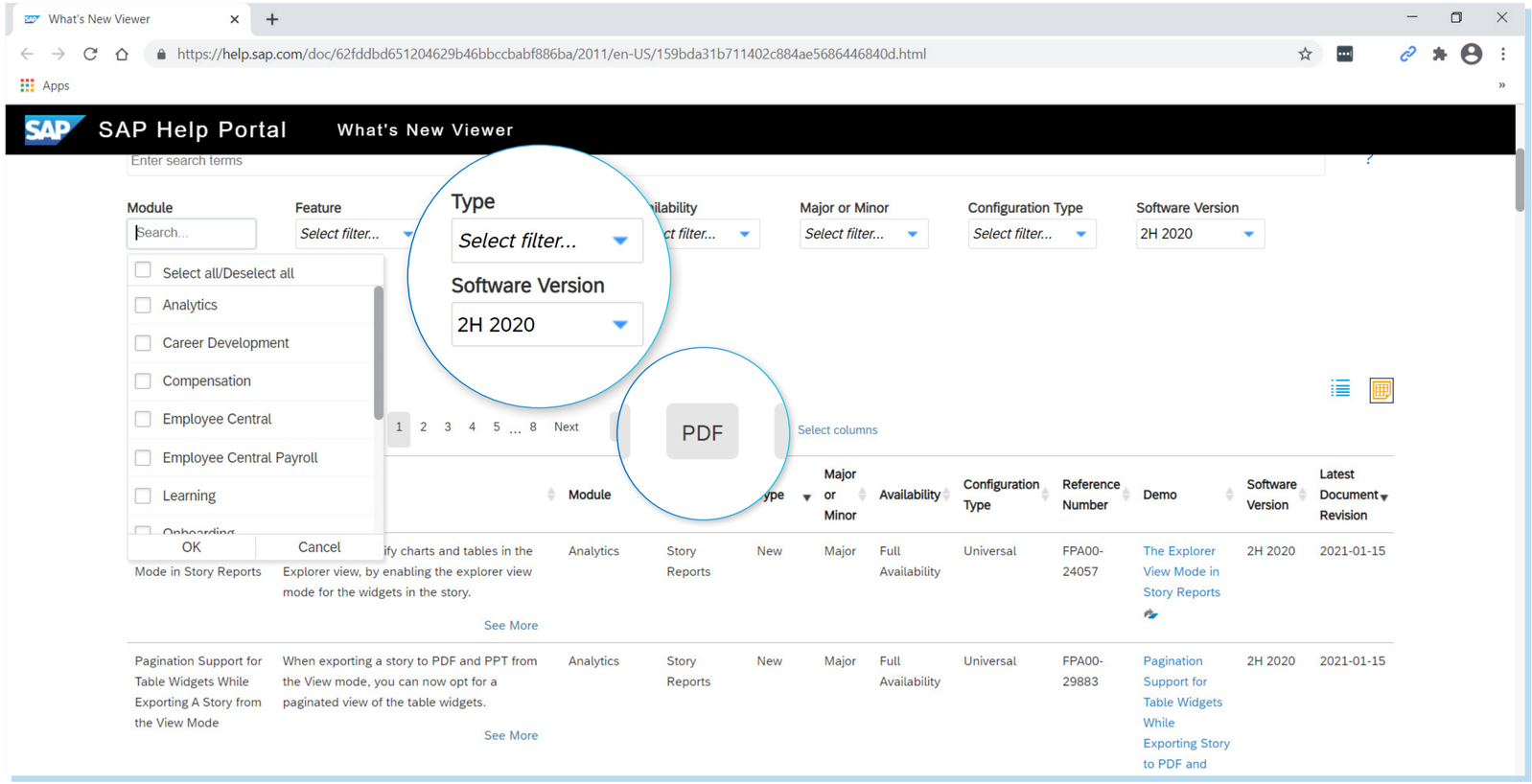

The filters at the top of the Viewer allow you to draw entries that are most relevant to you - covering everything from modules, availability, configuration type, and when the latest revision occurred.

You have the option of downloading the table of results into a PDF document but if you find something that particularly interests you, you can see additional notes, reminders, before and after screenshots and demo videos when you click “See More”.

Overall, the What’s New Release Viewer offers a more user-friendly experience to learning about the changes than a traditional workbook.

THE TLDR

What it is

A summary of every SAP SuccessFactors feature and functional changes from a release update available as a filterable web page and as a PDF

Best time to use

During prep

Location

SAP Help Portal → SAP SuccessFactors Release Information → What’s New Viewer Quick Links

Do I need an S-ID?

Yes

Subscribe for updates?

No

Pro tip

Narrow down the list by sorting by the latest revision to make sure you have the most relevant information.

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3

Release Review Q&A Series

The **Release Q&A Series** is an interactive way to learn about release updates through two-way communication directly with SAP SuccessFactors Product Managers.

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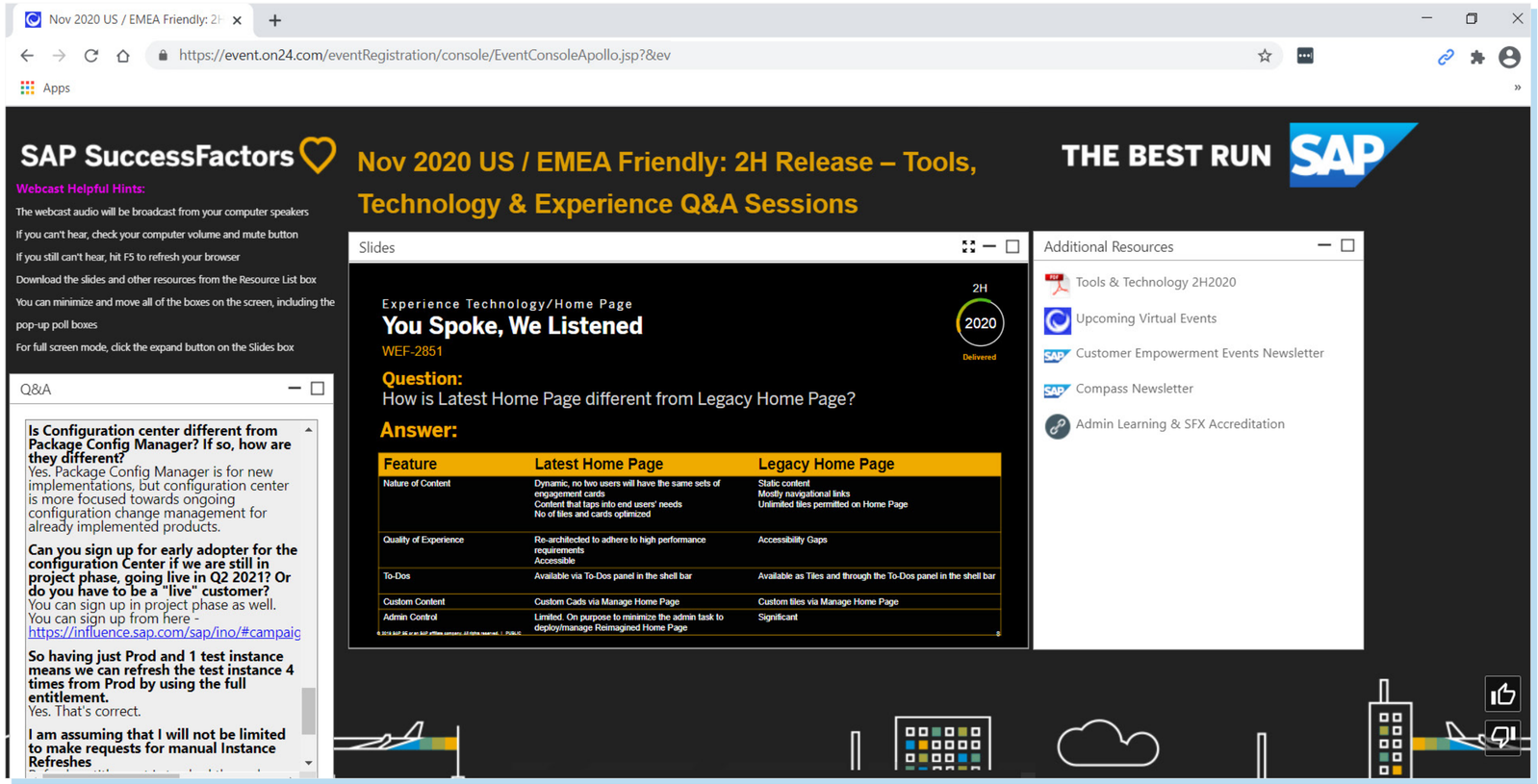

Using the Q&A Release Series quick link through the Product Updates blog, you can access resources for the upcoming session such as a PDF of pre-submitted questions and the Digital Library of recordings. Here, customers and users are also encouraged to submit their own questions.

It's a good habit to incorporate your Q&A learnings into your own release analysis and preparation. You might need to reconsider an existing process, plan change management, or even update user guides, reference videos, and configuration books.

To get the most value out of these sessions, familiarize yourself with the release review items beforehand and – again – submit your question(s) in advance.

THE TLDR

What it is
A live session held by SAP SuccessFactors product managers to address questions submitted by users about the new release changes

Best time to use
During prep

Location
SAP Customer Community Site → Product Updates Blog → Release Information

Do I need an S-ID?
Yes

Subscribe for updates?
No

Pro tip
Be proactive. SAP will only answer questions that were submitted in advance, so don't rely on others to ask something for you

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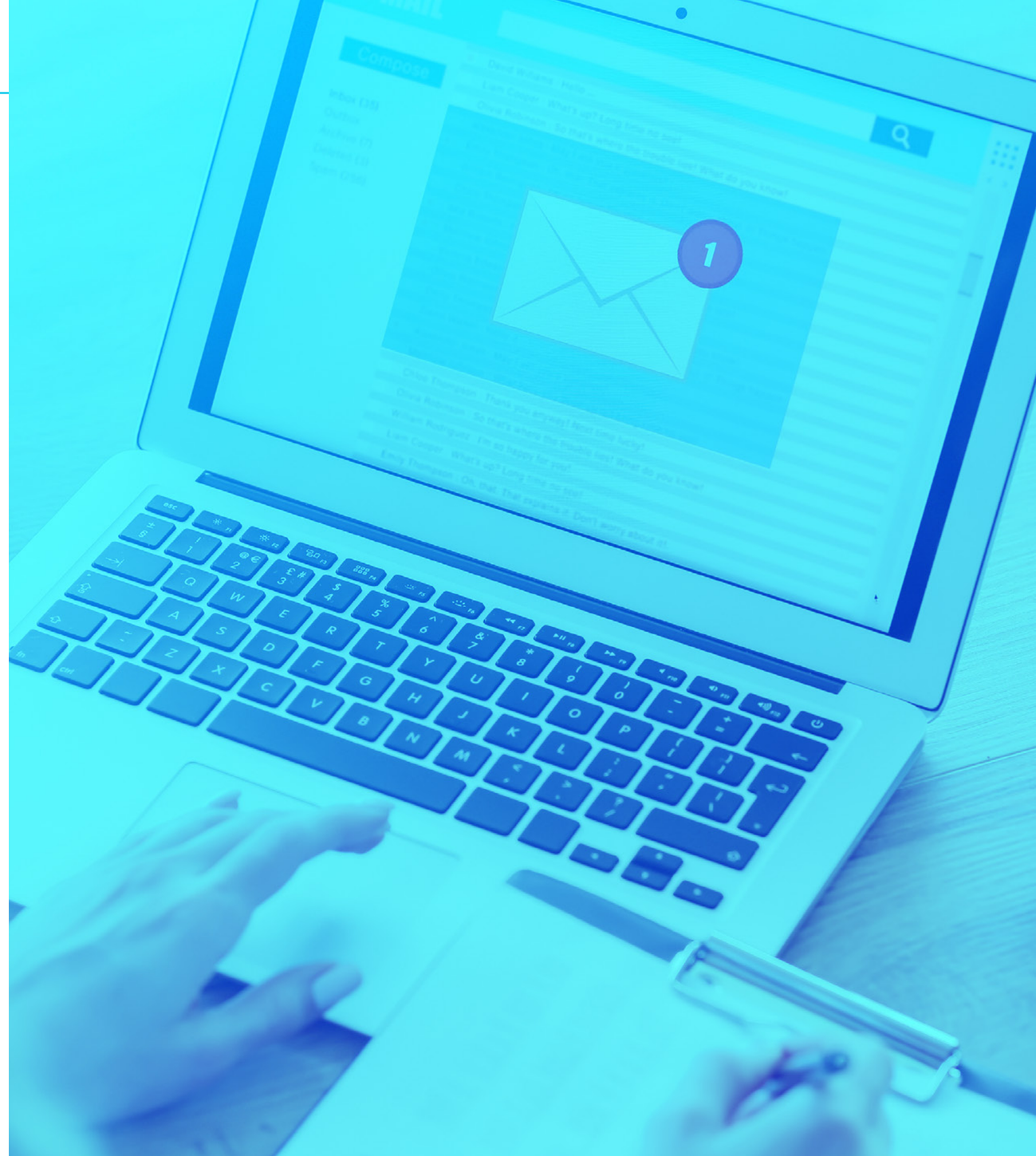
4

Innovation Alerts Dashboard

The **Innovation Alerts Dashboard** is a tool within the SAP Customer Community that provides a list of updates that require you to take action or prepare more change management than others. Some of these items will specify feature migrations and whether a feature will no longer be maintained or is being faded out.



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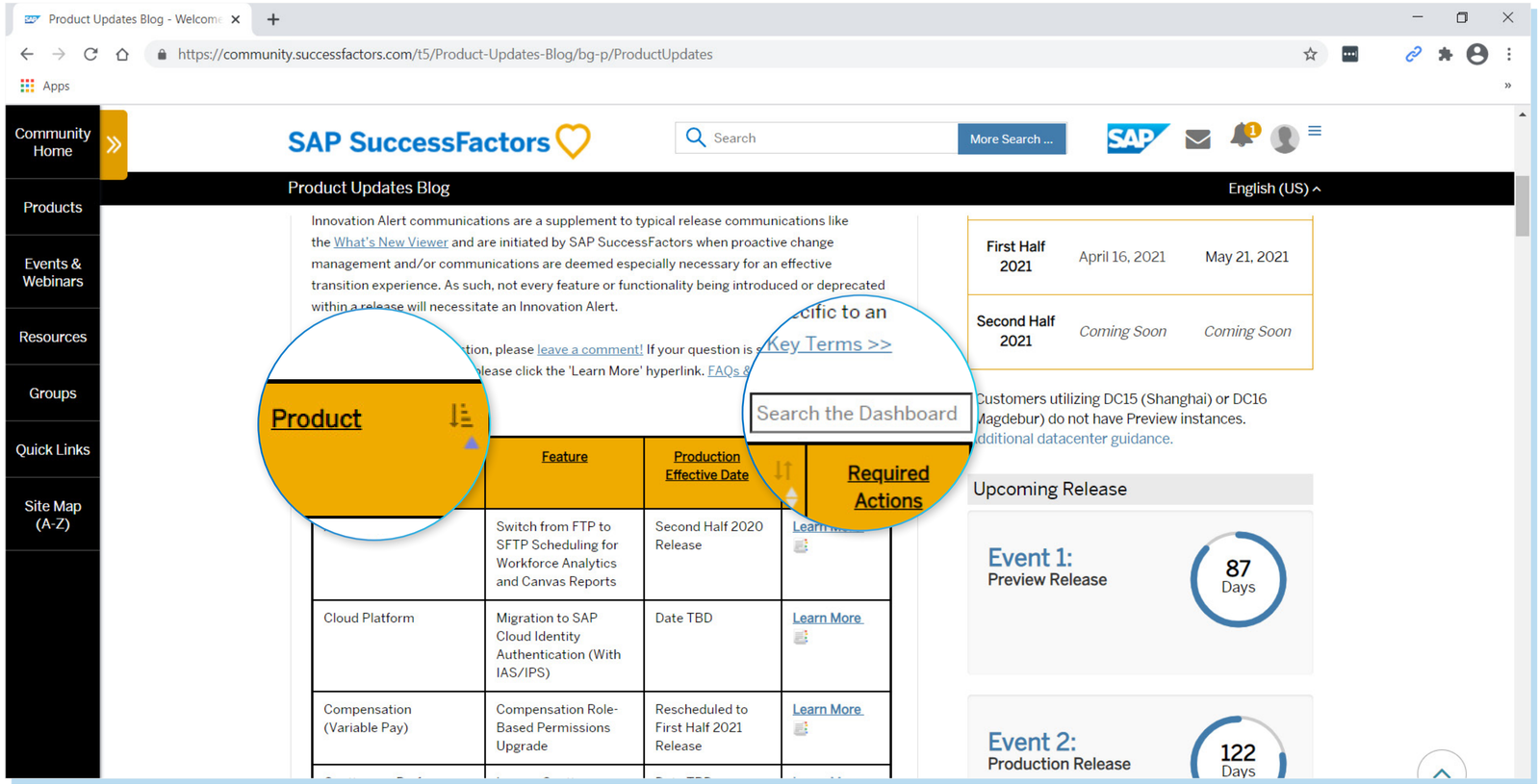

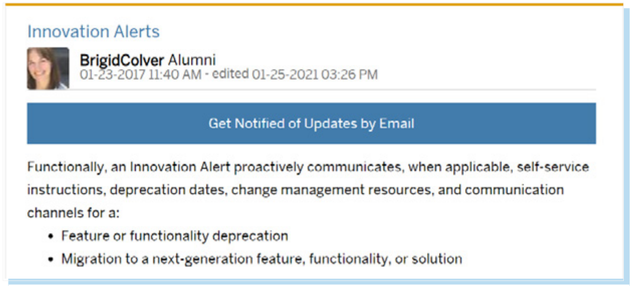

The dashboard consolidates the update list based on module so you can stay up to date on what's relevant to you. To make sure you find exactly what you're looking for, you can filter and search within the tool.

Because the Innovation Alerts Dashboard changes frequently and requires you to be proactive on updating your own SAP SuccessFactors system, it's important to subscribe to alerts.

THE TLDR

What it is
A supplemental table that summarizes changes that require a user to take action in their SuccessFactors instance

Best time to use
During prep and preview

Location
SAP Customer Community Site → Product Updates Blog → Innovation Alerts Dashboard quick link

Do I need an S-ID?
Yes

Subscribe for updates?
Yes

Pro tip
We can't stress enough how important it is to subscribe to this dashboard so you know exactly what you need to do, when you need to do it.

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5

SAP SuccessFactors Test Cases

SAP SuccessFactors Test Cases show end-users how changes to the system might impact their specific SuccessFactors instance – from both a process and visual perspective. This feature is usually available shortly after the release hits preview and is especially useful for universal changes.

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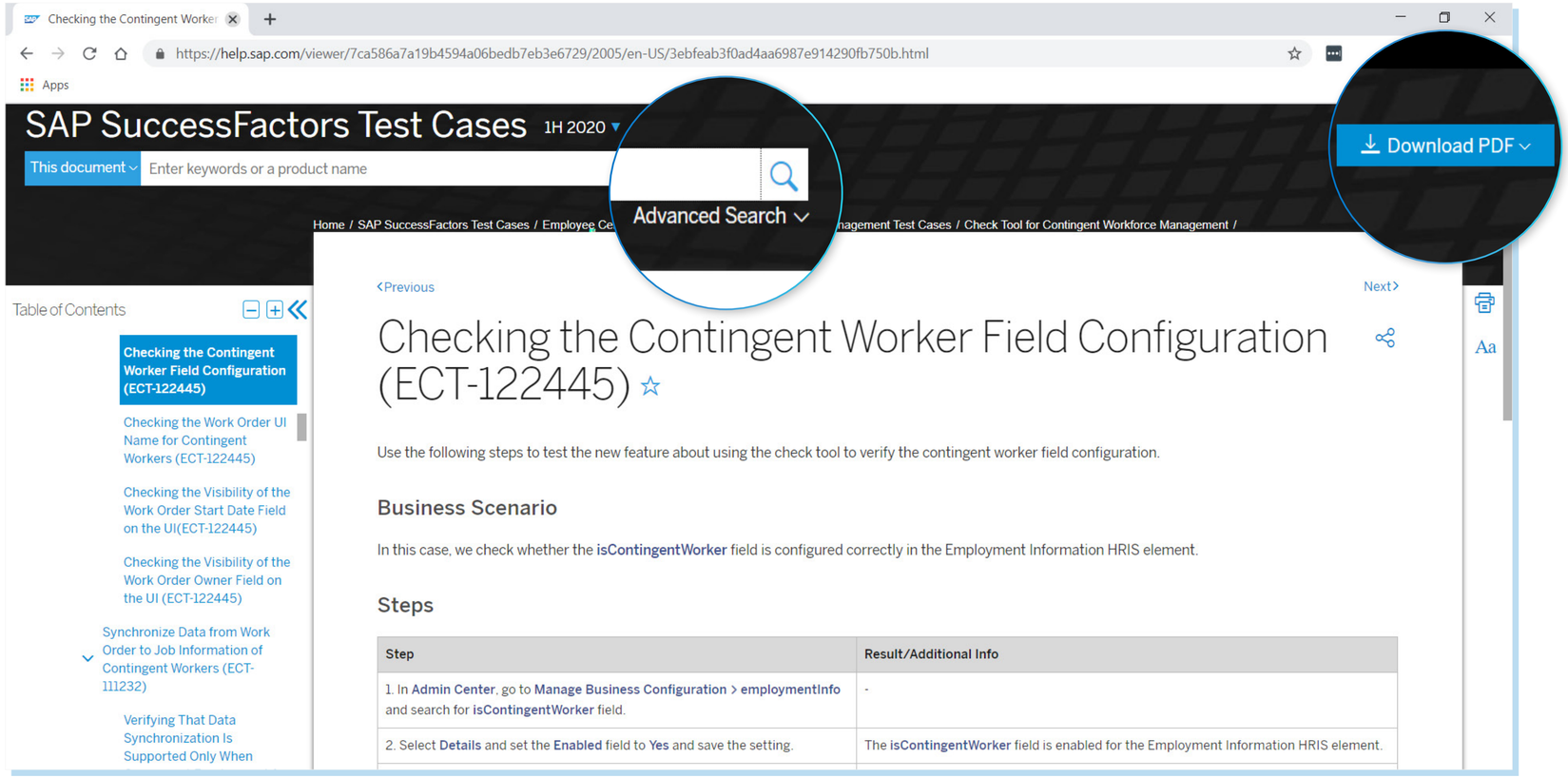

It is crucial that you run the test scenarios in your preview instance in case one of the changes negatively affects your existing processes. If the tests run smoothly, then you can look into moving the changes into your production instance.

Test Cases give you a great opportunity to see if any guides or reference videos need to be modified, or if you need to prepare any change management.

To save time testing the scenarios, prioritize the changes by impact:

1. universal **(high immediate impact)**,
2. opt-out **(medium immediate impact)**,
3. opt-in **(low immediate impact)**.

THE TLDR

What it is
A pre-built template ready to use for generic system testing purposes or to be adjusted to your configurations

Best time to use
During preview and prod

Location
SAP Help Portal → search for "SAP SuccessFactors Release Information" for drop down option → Test Cases quick link

Do I need an S-ID?
Yes

Subscribe for updates?
No

Pro tip
Leverage the scenarios SAP has put together to kickstart your testing but be sure to do so in your preview instance in case of any negative impacts.

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6

SAP SuccessFactors Patch Details

SAP provides an overview of customer-reported issues that are fixed in two-week “patches” throughout and after the releases known as the Patch Details.

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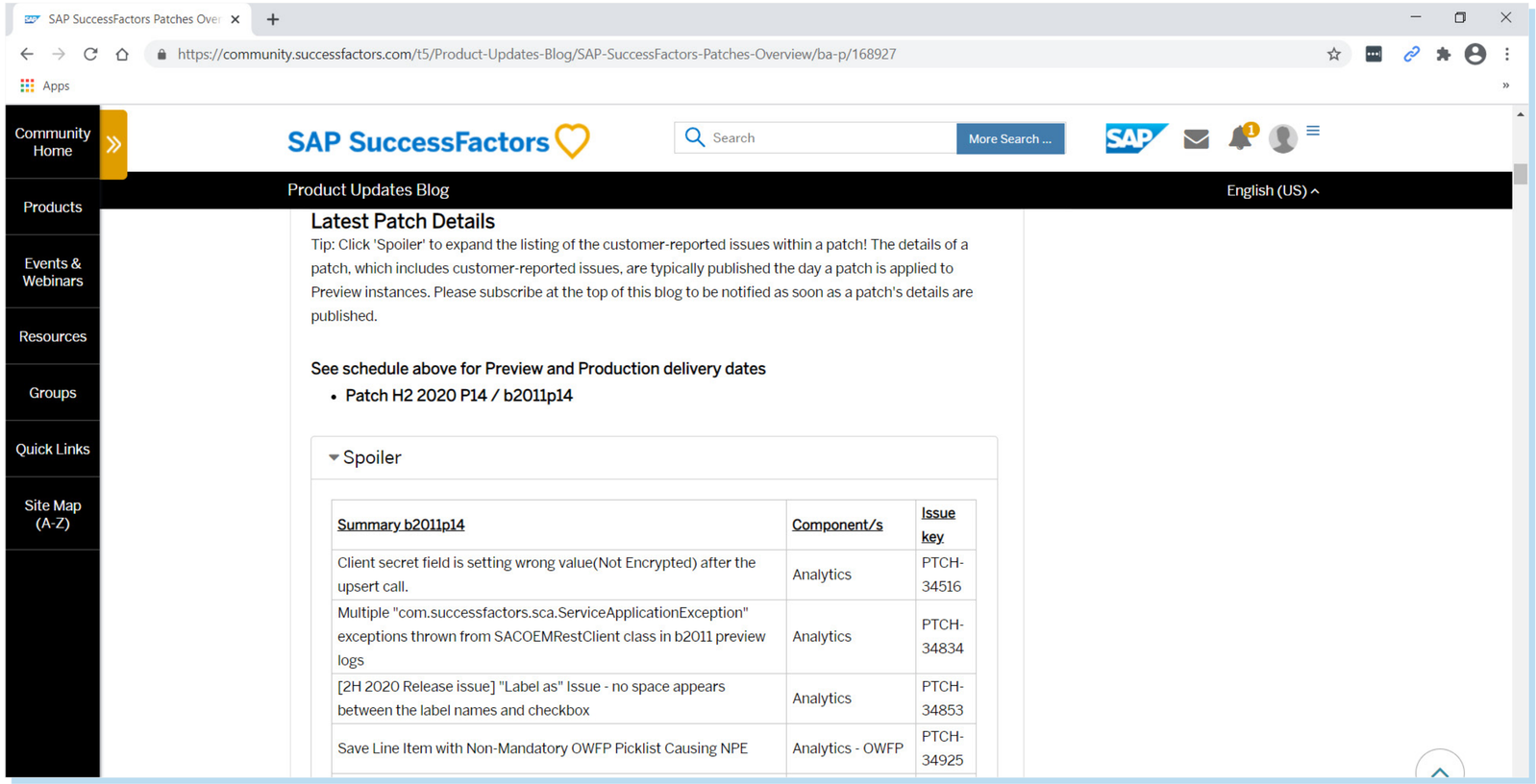

Each Patch has its own separate link allowing you to search by modules or reference numbers. Each Patch also has its own Knowledge Base Article (KBA) containing the list that you can download into a PDF file.

The Patches not only notify you of known issue resolutions but provide workarounds to existing issues and time frames as to when existing issues might be resolved.

For a quick fix, you can visit the Customer Community Calendar and look for the upcoming patches there.

THE TLDR

What it is
A bi-weekly list of customer-reported issues within SAP SuccessFactors that have since been resolved or will soon be resolved

Best time to use
During preview and prod

Location
SAP Customer Community Site → Product Updates Blog → Patch Details quick link

Do I need an S-ID?
Yes

Subscribe for updates?
Yes

Pro tip
For quick visibility into upcoming issue resolutions, visit the community calendar. Upcoming patches will be noted there.

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7

Rizing Release Review Live Streams

The tools we've shared so far have been primarily supplied by SAP. However, don't forget to check in with your SAP SuccessFactors partner community for synthesized release content and summaries. Many partner blogs, pamphlets, and videos are public. You have no excuse to not take advantage of them!

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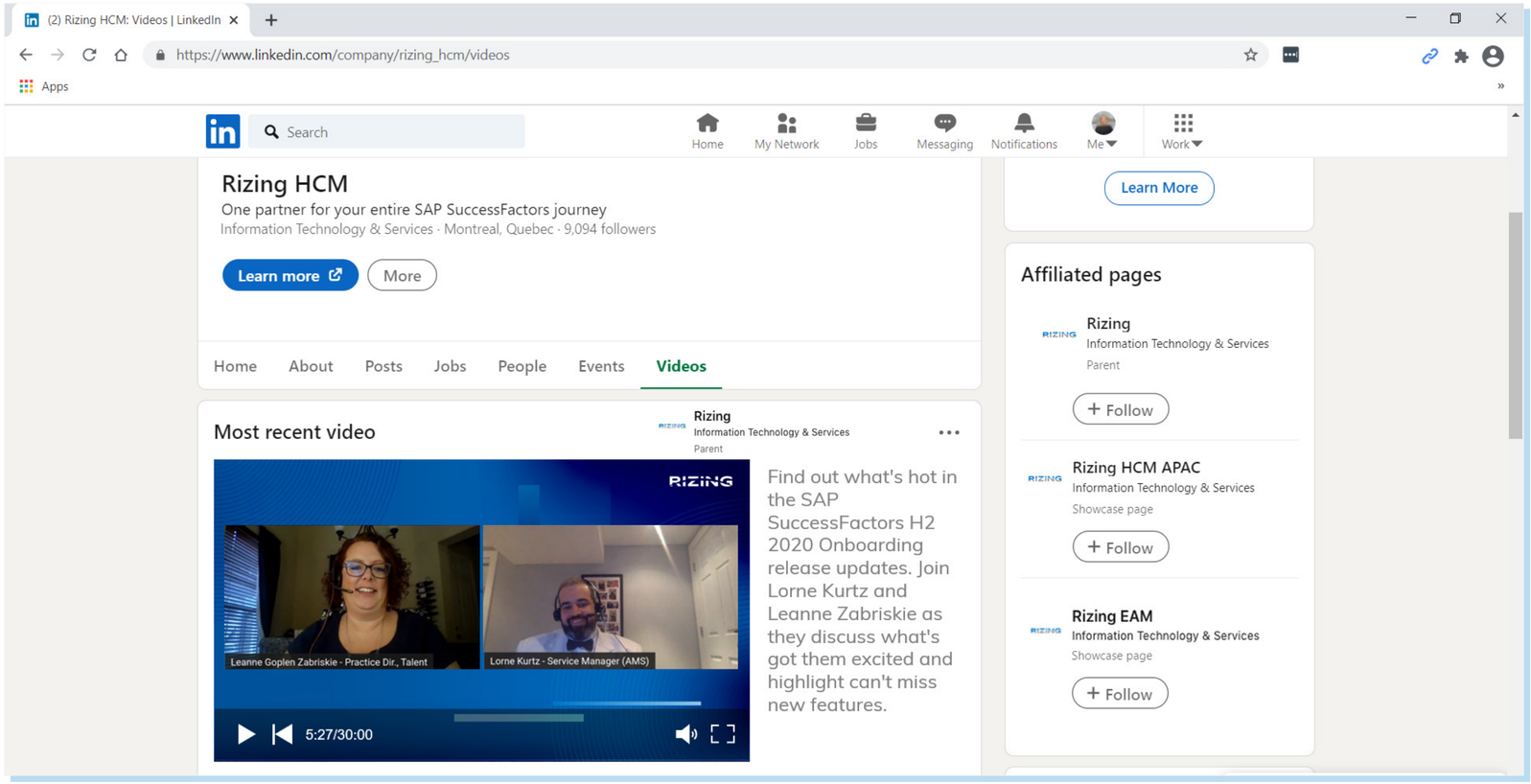

Every release cycle, Rizing publishes a blog series for covering the most important release changes in each SuccessFactors module. At the end of the blog series, we post a quick-fix summary PDF of the highlights on our LinkedIn page.

If you're more of a social or auditory learner, our Release Highlights Live Streams on LinkedIn might resonate with you. This is an opportunity for anyone and everyone to ask our solution experts real-time questions and hear their breakdown and reactions to the latest release. You can find recorded and upcoming live streams on the Rizing HCM LinkedIn page.

THE TLDR

What it is
Partner-generated content synthesizing the releases into bite-sized pieces of content like blogs, pamphlets, and videos

Best time to use
During prep, preview and prod

Location
rizing.com/hcm and RizingHCM on LinkedIn

Do I need an S-ID?
No

Subscribe for updates?
Yes

Pro tip
Engage by asking questions in the comments to get real-time answers on any of the modules, especially if you have something specific you'd like to see covered.

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Release Management Strategy Checklist

03

Like we said at the beginning, managing releases isn't easy. We have given you all the tools you need to succeed. But to keep you organized, here's a quick checklist you can rely on when you're planning your release strategy or rolling out your next steps:

- [ ] I marked my calendar for the Preview release date... but I also marked my calendar to start planning a few weeks prior
- [ ] I prepared my team by identifying who is responsible for which action items to make sure I have the right resources lined up to get our system ready
- [ ] I have a week-by-week breakdown of my strategy and approach so that there are no discrepancies when it's game-time
- [ ] I have subscribed to the tools that will help me
- [ ] I have registered for SAP's Q&A session and submitted my questions in advance
- [ ] I poked around the What's New Viewer and began analyzing the system changes in my Preview instance
- [ ] After the production release, I first did a validation in my preview instance and then validated in production to make sure my day-to-day processes continue to run smoothly

With that, you have everything you need to be a pro at managing releases. **Good luck – even though you don't need it.**

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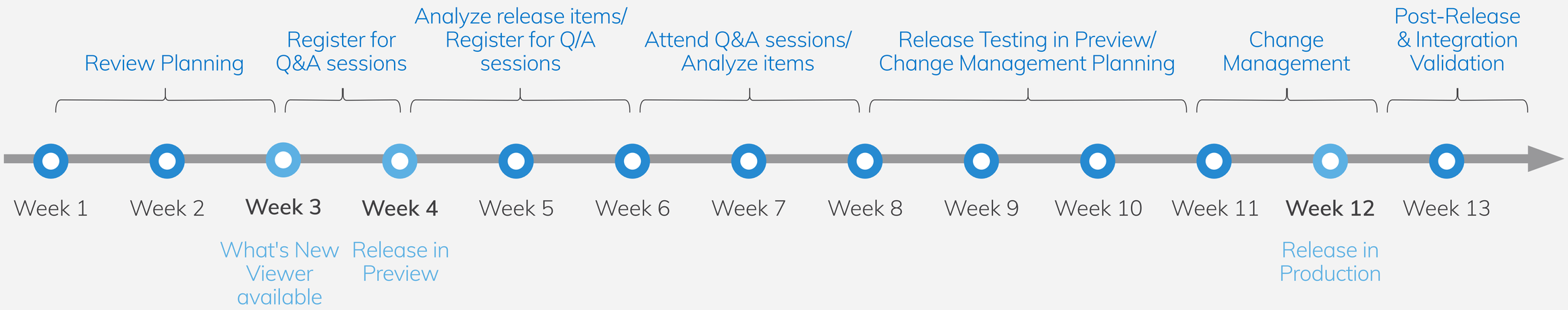
Release Management Timeline Template

04

This timeline was created for you to use as guidance for release management when preparing for upcoming release updates. You can take this timeline and adjust it to any changes in SAP's release schedule and to match your own company processes.



REMEMBER

The timeline is just a template. It's meant to be flexible but provide you with a roadmap of where your team should be in terms of release management preparation.

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The Top Tools Cheat Sheet

05

	What it is	Best time to use	Location	S-ID required	Should you Subscribe?	Pro tip
SAP Customer Community Site	Community of users and SAP experts offering resources and advice	During prep, preview and prod	SAP Customer Community Site → Products → Release Updates & Road	✓	✓	Check in from time to time to keep up with what's on other users' minds in the comments, and look out for insight in responses from SAP.
SAP What's New Release Viewer	A summary of every SAP SuccessFactors feature and functional changes from a release update available as a filterable web page and as a PDF	During prep	SAP Help Portal → SAP SuccessFactors Release Information → What's New Viewer Quick Links	✓		Narrow down the list by sorting by the latest revision to make sure you have the most relevant information.
Release Review Q&A Series	A live session held by SAP SuccessFactors product managers to address questions submitted by users about the new release changes	During prep	SAP Customer Community Site → Product Updates Blog → Release Information	✓		Be proactive. SAP will only answer questions that were submitted in advance, so don't rely on others to ask something for you
Innovation Alerts Dashboard	A supplemental table that summarizes changes that require a user to take action in their SuccessFactors instance	During prep and preview	SAP Customer Community Site → Product Updates Blog → Innovation Alerts Dashboard quick link	✓	✓	We can't stress enough how important it is to subscribe to this dashboard so you know exactly what you need to do, when you need to do it.
SAP SuccessFactors Test Cases	A pre-built template ready to use for generic system testing purposes or to be adjusted to your configurations	During preview and prod	SAP Customer Community Site → Product Updates Blog → Test Cases quick link	✓		Leverage the scenarios SAP has put together to kickstart your testing but be sure to do so in your preview instance in case of any negative impacts.
SAP SuccessFactors Patch Details	A bi-weekly list of customer-reported issues within SAP SuccessFactors that have since been resolved or will soon be resolved	During preview and prod	SAP Customer Community Site → Product Updates Blog → Patch Details quick link	✓	✓	For quick visibility into upcoming issue resolutions, visit the community calendar. Upcoming patches will be noted there.
Rizing Release Review Live Streams	Partner-generated content synthesizing the releases into bite-sized pieces of content like blogs, pamphlets, and videos	During prep, preview and prod	rizing.com/hcm and Rizing HCM on LinkedIn		✓	Engage by asking questions in the comments to get real-time answers on any of the modules, especially if you have something specific you'd like to see covered.

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Quicklinks to Top 7 Tools

1. https://community.successfactors.com/t5/Product-Updates-Blog/bg-p/ProductUpdates#

2. https://help.sap.com/doc/62fddbd651204629b46bbccbabf886ba/2011/en-US/159bda31b711402c884ae5686446840d.html

3. https://gateway.on24.com/wcc/eh/1892128/category/26523/release-information?partnerref=community

4. https://community.successfactors.com/t5/Product-Updates-Blog/Innovation-Alerts/ba-p/166613

5. https://help.sap.com/viewer/7ca586a7a19b4594a06bedb7eb3e6729/2011/en-US

6. https://community.successfactors.com/t5/Product-Updates-Blog/SAP-SuccessFactors-Patches-Overview/ba-p/168927

7. https://www.linkedin.com/company/rizing_hcm/

8. https://www.youtube.com/channel/UCGgNOXtSEdbtUwqGuRe8I4Q/featured

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