

SuccessFactors



People Performance

Live Profile - Part 1

Q3, 2008

**Overview, Enabling in Provisioning,
the four ZONES, Basic field and
section configuration**



Content of Live Profile Part 1

- Overview of Live Profile
- Enabling in Provisioning
- Differences between v10 and Ultra
- The four ZONES in the Data Model
 - Zone 1 – Define single value fields; standard elements
 - Zone 2 – Define multiple value sections
 - Zone 3 – Define custom filters and set permissions
 - Zone 4 – Layout
- Basic Configuration in the Data Model – Explanation and Exercises
 - Exercise 1 - Move Background section
 - Exercise 2 - Rename a section
 - Exercise 3 - Remove fields from a section
 - Exercise 4 – Rename a field in a section
- Field-names for background section data-fields
 - Exercise 5 – Add a field to a background section
 - Exercise 6 – Add a live link to a background section



- The “Succession Management data model XML” is used to configure:
 - Live Profile
 - Layout (for ULTRA, moving to Admin August 08 Build)
 - Read/Write Permissions
 - Query Tool
 - Searchable Fields/Sections
 - Directory Permissions
 - Personal Information Section for PM Form
 - Employee Scorecard
 - Portlets available for view
 - Compensation

- The data model is written in XML and follows the [sf-form.dtd](#)

Live Profile v3.0 setup requires access to Provisioning and an xml editor (e.g. Oxygen, Altova, notepad, wordpad, XML Spy, etc). A live profile template is defined by a single xml **data model** file.

Single-click loading is available for 4 **pre-packaged** Live Profile data models. They are:

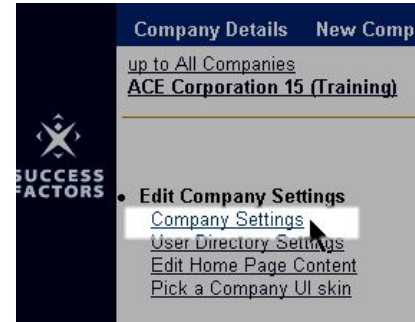
- (1) **Truly Basic** – for companies not really using SP and needing minimal Profile
- (2) **Standard Template**
- (3) **Premium Template** and
- (4) **Standard with Employee Scorecard**.

The aim of the **Live Profile Premium Template** was to offer a thorough list of common employee data fields that would accommodate many client needs. Most clients request custom configurations (ex: field labels, field addition/removal, field permissions, etc).

Most customization requests may be addressed by modifying the **data model** xml file.

Provisioning: Enabling Live Profile

- Go to Provisioning Company Settings



- Step 1
Turn on **Live Profile** in **Company Settings**

Live Profile

- Step 2
Enable **Language Packs** and (at a minimum)
Check English US

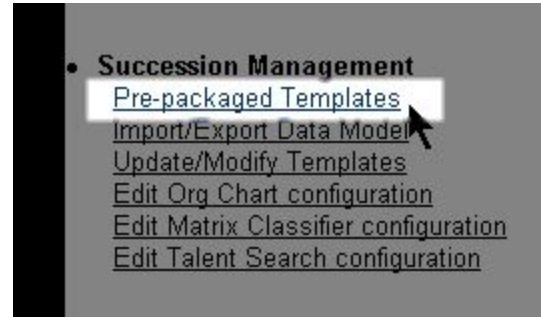
Language Packs: (Please do not use (SF)Czech, Danish, Finnish, Hebrew, Hindi, Hungarian, Norwegian, (SF) Polish, (SF)Portugese, Brazilian Portuguese, Russian, Slovak, Swedish, Tagalog, (SF)Thai, Ukrainian, and Vietnamese!! It is in development phase and it has no translation in place yet.)
Display flags next to languages in user options:

English (US) English_US en_US



■ Step 3

Load the
**SuccessFactors
Premium** template in
**Pre-packaged
Templates**



Pre-packaged Templates

Select the pre-packaged set of Live Profile (part of Succession Management) templates to load. **Please note that once you request to load a package, all existing templates loaded in the system will be deleted. At this point, the system does not offer the capability to upload a template.**

- Truly Basic Data Model.
- Success Factors Standard
- Success Factors Premium (Standard + Photo) Org Chart, Use this model.
- Success Factors Standard with Employee Scorecard.

Import

Live Profile Structure as Seen by User – Ultra View



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“Personal Information” -
single values – Basic
configuration

Left Navigation,
controlled by the View
Template (not in Ultra)

“Org Chart Fields” –
Data typically
permitted to
manager+ for display
on Succession Org
Chart

Background elements –
multiple values per
section – Education,
Languages, etc.

Background elements
specific to Performance
and Potential. Note,
these sections can be
placed in either
permission.

The screenshot displays the 'Live Profile' for a user named Edward Employees. The interface is divided into several sections:

- Personal Information:** A form with fields for Username, Full Name, Title, Business Phone, Email, Address, City, State, ZIP, Location, Job Code, Manager, Department, Hire Date, and Tap.
- Org Chart Fields:** A table with columns for Start Date, End Date, Rating, and Rating Label. It includes sections for 'Performance (Manager view only)', 'Potential (Manager view only)', 'Special Assignments/Projects', and 'Education'.
- Background Elements:** A table with columns for From Date, End Date, Company Name, Type of Business, and Title. It includes sections for 'Work Experience Within Company' and 'Education'.

Analytics – Data pulled from PM forms,
imported or input – PM ratings, Potential
and Competency Ratings. Could be
configured in Ultra as well.

Structure – The 4 ZONES of the Data Model (1 of 2)



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- The data model may look intimidating at first glance
- Close examination of the data model will reveal its **4 ZONE** structure
- Get to know the ZONES!!!

Structure – The 4 ZONES of the Data Model (2 of 2)



ZONE 1 – DEFINE single value fields

- (1A) Describe all standard “directory” elements (labels, whether required, whether matrix-filter)
- (1B) Describe any <standard-element> fields from Personal Info file (required, label, picklist)
- (1C) Declare all new <userinfo-element> fields to include in the Live Profile (type, length, display-size, label, required, picklist)

ZONE 2 – DEFINE multiple value sections

Define all <background-element> sections. Background element sections are used to capture:

- (2A) “Multiple-record” user information such as education history, languages spoken, certifications, etc.
- (2B) Trended “rating-records” such as potential ratings, performance ratings, overall objective ratings, and overall competency ratings.
- (2C) System-defined “scorecard portlets” such as Contact Portlet, Experience Snapshot Portlet.

ZONE 3 – DEFINE Custom Filters and SET PERMISSIONS

- Define all standard “directory” custom filters
- Define read/write permissions for all fields/ sections by user roles

ZONE 4 – LAYOUT – **Changes in August 08 Build for ULTRA instances**

- (4A) Define one to many Live Profile templates for use in the “My Profile” product screen.
- (4B) Define one special template with id=“talentSearch” **NOTE:** If one is not defined, the Query Tool will use the template with id=“employeeProfile”.
- (4C) Define one special template with id=“employeeScoreCard“ for use as Employee Scorecard.
- (4D) Define one special template with id=“sysUserDirectorySetting”

ZONE 1 – Define Single Value Fields



ZONE 1

- (1A) Describe all standard “directory” elements (labels, whether required, whether matrix_filter)
- (1B) Describe any <standard-element> fields from Personal Info file (required, label, picklist)
- (1C) Declare all new <userinfo-element> fields to include in the Live Profile (type, length, display-size, label, required, picklist)

- **<standard-element>** blocks must be listed above **<userinfo-element>** blocks.
- **Parameters for <standard-element>** include:
 - **id (one value) – REQUIRED**
 - **display-size (one integer value)**
 - **max-length (one integer value)**
 - **required (true / false)**
 - **Matrix-filter (true / false)**
- **Parameters for <userinfo-element>** include:
 - **id (one value) – REQUIRED**
 - **type (one value) – REQUIRED**
 - **display-size (one integer value)**
 - **max-length (one integer value)**
- Common **attributes** for **<standard-element>** and **<userinfo-element>** include:
 - **<label> (one value) – REQUIRED**
 - **<picklist> (one value)**

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE succession-data-model PUBLIC
"-//SuccessFactors, Inc./DTD Succession Data Model 1.0/EN"
"http://cvs.successfactors.com/viewcvs/v4/src/com/sf/dtd/sf-form.dtd">
<!--=====
Y
Y THIS IS THE BEGINNING OF THE SUCCESSION DATA MODEL
Y
Y=====
-->
<succession-data-model>
  <description>Success Factors Standard Data Model</description>
  <!--=====
  Y
  Y ZONE 1: (A) Define all <userinfo-element> fields you would like to
  Y include in the Live Profile.
  Y (B) Map picklists created in the Administration tool to
  Y <standard-element> and <userinfo-element> fields.
  Y
  Y=====
  -->
  <standard-element id="riskOfLoss">
    <label mime-type="text-html"><![CDATA[<a href="javascript:openUrl('http://www.successfactors.com')">The Risk of Loss</a>]]></label>
    <picklist id="riskOfLoss"/>
  </standard-element>
  <standard-element id="impactOfLoss">
    <picklist id="impactOfLoss"/>
  </standard-element>
  <standard-element id="benchStrength">
    <picklist id="benchStrength"/>
  </standard-element>
  <standard-element id="reasonForLeaving">
    <picklist id="reasonForLeaving"/>
  </standard-element><standard-element id="talentPool">
    <picklist id="talentPool"/>
  </standard-element>
  <userinfo-element id="favoriteRestaurant" type="varchar" display-size="50">
    <label>Favorite Restaurant</label>
  </userinfo-element>
  <!--=====
  Y
  Y ZONE 2: Define all <background-element> sections. Background
  Y element sections are used to capture:
  Y (2A) "Multiple-records" user information such as education
  Y history, languages spoken, certifications, etc.
  Y (2B) Trended "rating-records" such as potential ratings,
  Y performance ratings, overall objective ratings, and
  Y overall competency ratings.
  Y
  Y=====
  -->
```

ZONE 1 – Default Standard-Elements



Source for this information is the dtd. Standard fields may change without notice – be sure to check the dtd!

From Employee Data File:

userId | username | email | gender | lastName | firstName | mi | department | division | location | jobCode | hireDate | timeZone | managerId | hrid empld | title | businessPhone | fax | addressLine1 | addressLine2 | city | state | zipCode | country | reviewFreq | lastReviewDate | custom01 | custom02 | custom03 | custom04 | custom05 | custom06 | custom07 | custom08 | custom09 | custom10 | custom11 | custom12 | custom13 | custom14 | custom15 | matrixManager | proxy | customManager | secondManager | defaultLocale | status

From Extended, Personal Information Data File:

ssn | dateOfBirth | citizenship | nationality | ethnicity | married | minority | businessSegment | serviceDate | level | photo | function | performance | potential | objective | competency | talentPool | riskOfLoss | impactOfLoss | benchStrength | reasonForLeaving | newToPosition | dateOfPosition | keyPosition | futureLeader | matrixManaged |

Compensation Data Fields:

| salary | salaryLocal | localCurrencyCode | jobTitle | jobLevel | payGrade | dateOfCurrentPosition | bonusTarget | salaryProrating | raiseProrating | promotionAmount | lumpsumTarget | lumpsum2Target | compensationReadOnly | meritTarget | meritEffectiveDate | compensationEligible | compensationSalaryEligible | compensationBonusEligible | compensationStockEligible | compensationSalaryRateType | compensationSalaryRateUnits | salaryBudgetTotalRaisePercentage | salaryBudgetMeritPercentage | salaryBudgetPromotionPercentage | salaryBudgetExtraPercentage | salaryBudgetExtra2Percentage | salaryBudgetLumpsumPercentage | salaryBudgetFinalSalaryPercentage | salaryBudgetTotalCompPercentage | stockBudgetStockAmount | stockBudgetUnitAmount | stockBudgetOptionAmount | stockBudgetOther1Amount | stockBudgetOther2Amount | stockBudgetOther3Amount | bonusBudgetAmount | personalCompensationStatement | vpIndividualView | personalVarPayStatement

| userTags | time | retirementDate | seatingChart



ZONE 2A – Multi-record user info

ZONE 2A

Define all <background-element> sections. Background element sections are used to capture:

- (2A) “Multiple-record” user information such as education history, languages spoken, etc.
- (2B) Trended “rating-records” such as potential ratings, performance ratings, etc.
- (2C) System-defined “scorecard portlets” such as Contact Portlet, Experience Snapshot Portlet.

Parameters for <background-element> include:

- **id (one value) – REQUIRED**
- **type-id (one value) – REQUIRED**
- **max-entries (one integer value)**

Attributes for <background-element> include:

- **<label> (one value) REQUIRED**
- **<description> (one value)**
- **<data-field> (one to many)**
 - Parameters for <data-field> include:
 - **id (one value) REQUIRED**
 - **field-name (one value) REQUIRED**
 - **required (true | false)**
 - **display-size (one integer value)**
 - **max-length (one integer value)**
 - **hidden (reserved for future use)**
 - Attributes for <data-field> include:
 - **<label> (one value) REQUIRED**
 - **<picklist> (one value)**

```

<!--=====
//
//
// ZONE 2: Define all <background-element> sections. Background
// element sections are used to capture:
// (2A) "Multiple-records" user information such as education
// history, languages spoken, certifications, etc.
// (2B) Trended "rating-records" such as potential ratings,
// performance ratings, overall objective ratings, and
// overall competency ratings.
//
//
//=====-->
<!--=====
//
//
// START OF ZONE 2A (See above for definition of "2A")
//
//=====-->
<background-element id="insideWorkExperience" type-id="1">
  <label>Work Experience Within Organization</label>
  <description>Work Experience Within Organization</description>
  <data-field id="fromDate" field-name="startDate" required="true">
    <label>From Date</label>
  </data-field>
  <data-field id="thruDate" field-name="endDate">
    <label>End Date</label>
  </data-field>
  <data-field id="title" field-name="vfid1" required="true">
    <label mime-type="text-html"><![CDATA[<a href="javascript:openUrl('http://www.successfactors.com')">Title</a>]]></label>
  </data-field>
</background-element>
<background-element id="outsideWorkExperience" type-id="2">
  <label>Previous Employment</label>
  <data-field id="employer" field-name="vfid2" required="true">
    <label>Company Name/Location</label>
  </data-field>
  <data-field id="businessType" field-name="vfid3">
    <label>Type of Business</label>
  </data-field>
  <data-field id="startTitle" field-name="vfid1">
    <label>Starting Position</label>
  </data-field>
  <data-field id="startDate" field-name="startDate">
    <label>Date Begin</label>
  </data-field>
  <data-field id="endTitle" field-name="vfid4">
    <label>Ending Position</label>
  </data-field>
  <data-field id="endDate" field-name="endDate">
    <label>End Date</label>
  </data-field>
</background-element>
<background-element id="education" type-id="3">

```



ZONE 2B – Trended “rating-records”

ZONE 2B

Define all <background-element> sections. Background element sections are used to capture:

- (2A) “Multiple-record” user information such as education history, languages spoken, etc.
- (2B) Trended “rating-records” such as potential ratings, performance ratings, etc.
- (2C) System-defined “scorecard portlets” such as Contact Portlet, Experience Snapshot Portlet.

Parameters for <background-element> include:

- **id (one value) – REQUIRED**
- **type-id (one value) – REQUIRED**
- **max-entries (one integer value)**
- **feedback-type* (5 or 6 or 7 or 8)**
- **scale-id ** (Potential or Performance or Objective or Competency)**

Attributes for <background-element> include:

- **<label> (one value) REQUIRED**
- **<description> (one value)**
- **<rating-field> (system defined)**
 - Parameters for <rating-field> include:
 - **rating-name (system defined) REQUIRED**
 - **required (true | false), or**
 - **visibility (none | view | edit | both) REQUIRED**
 - **insert-rating (true | false)**
 - **system-generated (true | false)**
 - **display-size (one integer value)**
 - **max-length (one integer value)**
 - Attributes for <rating-field> include:
 - **<label> (one value) REQUIRED**

* “5” = Overall Competency; “6” = Overall Objective; “7” = Potential; “8” = Performance

** This set of four scales are configured in Admin Tool under Matrix Grid Rating Scales

```

<!--=====
Y
Y START OF ZONE 2B (See above for definition of "2B")
Y
Y=====
<background-element id="sysOverallPotential" type-id="9" scale-id="Potential" feedback-type="7">
  <label>Potential</label>
  <rating-field rating-name="start-date" required="true" display-size="12">
    <label>Start Date</label>
  </rating-field>
  <rating-field rating-name="end-date" required="true" display-size="12">
    <label>End Date</label>
  </rating-field>
  <rating-field rating-name="name" visibility="none" max-length="100" display-size="30">
    <label>name</label>
  </rating-field>
  <rating-field rating-name="description" visibility="none" max-length="100" display-size="30">
    <label>description</label>
  </rating-field>
  <rating-field rating-name="rating" insert-rating="true" required="true" display-size="8">
    <label>Rating</label>
  </rating-field>
  <rating-field rating-name="label" visibility="view" display-size="30">
    <label>Rating Label</label>
  </rating-field>
  <rating-field rating-name="min" visibility="none" display-size="8">
    <label>Minimum Scale Rating</label>
  </rating-field>
  <rating-field rating-name="max" visibility="none" display-size="8">
    <label>Maximum Scale Rating</label>
  </rating-field>
  <rating-field rating-name="source" system-generated="true" visibility="view" max-length="8" display-size="8">
    <label>source</label>
  </rating-field>
  <rating-field rating-name="module" system-generated="true" visibility="view" max-length="8" display-size="8">
    <label>module</label>
  </rating-field>
</background-element>
<background-element id="sysOverallPerformance" type-id="8" scale-id="Performance" feedback-type="8">
  <label>Performance</label>
  <rating-field rating-name="start-date" required="true" display-size="12">
    <label>Start Date</label>
  </rating-field>
  <rating-field rating-name="end-date" required="true" display-size="12">
    <label>End Date</label>
  </rating-field>
  <rating-field rating-name="name" visibility="none" max-length="100" display-size="30">
    <label>name</label>
  </rating-field>
  <rating-field rating-name="description" visibility="none" max-length="100" display-size="30">
    <label>description</label>
  </rating-field>
  <rating-field rating-name="rating" insert-rating="true" required="true" display-size="8">
    <label>Rating</label>
  </rating-field>
  <rating-field rating-name="label" visibility="view" display-size="30">
    <label>Rating Label</label>
  </rating-field>
  <rating-field rating-name="min" visibility="none" display-size="8">
    <label>Minimum Scale Rating</label>
  </rating-field>
  <rating-field rating-name="max" visibility="none" display-size="8">
    <label>Maximum Scale Rating</label>
  </rating-field>
  <rating-field rating-name="source" system-generated="true" visibility="view" max-length="8" display-size="8">
    <label>source</label>
  </rating-field>
  <rating-field rating-name="module" system-generated="true" visibility="view" max-length="8" display-size="8">
    <label>module</label>
  </rating-field>
</background-element>
-->

```




ZONE 2C – Employee “ScoreCard” portlets

ZONE 2C

Define all <background-element> sections. Background element sections are used to capture:

- (2A) “Multiple-record” user information such as education history, languages spoken, etc.
- (2B) Trended “rating-records” such as potential ratings, performance ratings, etc.
- (2C) System-defined “scorecard portlets” such as Contact Portlet, Experience Snapshot Portlet.

▪ **Parameters** for <background-element> include:

- **id (one value) – REQUIRED**
- **type-id (one value) – REQUIRED**
- **max-entries (one integer value)**

▪ **Attributes** for <background-element> include:

- **<label> (one value) REQUIRED**

```
<!--=====
//
// START OF ZONE 2C (See above for definition of "2C")
//
//=====-->
<background-element id="sysScoreCardOverviewPortlet" type-id="27">
  <label>Overview Portlet</label>
</background-element>
<background-element id="sysScoreCardContactPortlet" type-id="28">
  <label>Contact Portlet</label>
</background-element>
<background-element id="sysScoreCardOrgProfilePortlet" type-id="29">
  <label>Organization Profile Portlet</label>
</background-element>
<background-element id="sysScoreCardExpSnapshotPortlet" type-id="30">
  <label>Experience Snapshot Portlet</label>
</background-element>
<background-element id="sysScoreCardPerfHistoryPortlet" type-id="31">
  <label>Performance Snapshot Portlet</label>
</background-element>
<background-element id="sysScoreCardCompetenciesPortlet" type-id="32">
  <label>Competencies Portlet</label>
</background-element>
<background-element id="sysScoreCardCompBehaviorPortlet" type-id="33">
  <label>Competency Behavior Breakdown Portlet</label>
</background-element>
<background-element id="sysScoreCardObjRatingsPortlet" type-id="34">
  <label>Objective Ratings Portlet</label>
</background-element>
```



ZONE 3 – Define Custom Filters and Permissions

ZONE 3

Define custom filter and read/write permissions

- (3A) Define custom filters
- (3B) Set permissions for <standard-element> fields, <userinfo-element> fields, and <background-element> sections by user roles (e.g., “E”, “EM”, EMM”, “EM+”, “EH”, “EX”, “*”, etc.)
- **Attributes for <custom-filters> include:**
 - <standard-element-ref> (one to three)
 - Parameters for <standard-element-ref> include:
 - **refid (one value) – REQUIRED**
- **Parameters for <element-permission> include:**
 - **type (write* | read) – REQUIRED**
- **Attributes for <element-permission> include:**
 - <description> (one value) – does not appear in the product
 - <role-name> (one to many) – at least one entry is **REQUIRED**
 - <standard-element-ref> (zero to many)
 - Parameters for <standard-element-ref> include:
 - **refid (one value) – REQUIRED**
 - <userinfo-element-ref> (one to many)
 - Parameters for <userinfo-element-ref> include:
 - **refid (one value) – REQUIRED**
 - <background-element-ref> (one to many)
 - Parameters for <background-element-ref> include:
 - **refid (one value) – REQUIRED**

```

//
// ZONE 3:
// (A) Define standard "directory" fields which will be "custom filters".
// (B) Set permissions.
//=====-->
<!--=====
//
// START OF ZONE 3A (See above for definition of "3A")
//=====-->
<custom-filters>
  <standard-element-ref refid="custom02"/>
  <standard-element-ref refid="custom01"/>
</custom-filters>
<!--=====
//
// START OF ZONE 3B (See above for definition of "3B")
//=====-->
<element-permission type="read">
  <description>
    Grant read permissions for Employee.
  </description>
  <role-name>E</role-name>
  <standard-element-ref refid="username"/>
  <standard-element-ref refid="firstName"/>
  <standard-element-ref refid="mi"/>
  <standard-element-ref refid="lastName"/>
  <standard-element-ref refid="title"/>
  <standard-element-ref refid="jobCode"/>
  <standard-element-ref refid="level"/>
  <standard-element-ref refid="department"/>
  <standard-element-ref refid="location"/>
  <standard-element-ref refid="managerId"/>
  <standard-element-ref refid="matrixManager"/>
  <standard-element-ref refid="email"/>
  <standard-element-ref refid="businessPhone"/>
  <standard-element-ref refid="fax"/>
  <standard-element-ref refid="serviceDate"/>
  <standard-element-ref refid="citizenship"/>
  <standard-element-ref refid="city"/>
  <standard-element-ref refid="state"/>
  <standard-element-ref refid="photo"/>
  <background-element-ref refid="insideWorkExperience"/>

```


ZONE 4A – <employeeProfile> view-templates for v10 instances



ZONE 4A for v10 instances

Changes in August 08 build for ULTRA instances documented separately

- (4A) Define one or more Live Profile templates for use in the “My Profile” product screen.

Parameters for <view-template> include:

- **id (one value) – REQUIRED**

Attributes for <view-template> include:

- **<label> (one value) REQUIRED**
- **<description> (one value)**
- **<edit-template> (one to many)**
 - Parameters for <edit-template> include:
 - **id (one value) – REQUIRED**
 - Attributes for <edit-template>* include:
 - **<label> (one value) REQUIRED**
 - **<description> (one value)**
 - **<standard-element-ref> (zero to many)**
 - SEE ZONE 3 for <standard-element-ref> structure
 - **<userinfo-element-ref> (zero to many)**
 - SEE ZONE 3 for <userinfo-element-ref> structure
 - **<background-element-ref> (zero to many)**
 - SEE ZONE 3 for <background-element-ref> structure

```

//
// ZONE 4: (4A) Define one to many Live Profile templates for use in
// the "My Profile" product screen.
//
// (4B) Define one special template with id="talentSearch"
// and visibility set to "none" for use by the Query Tool.
// NOTE: If one is not defined, the Query Tool will just
// use the template with id = "employeeProfile". If one
// is defined, then the Query Tool will restrict the
// searchable fields to those contained in the
// "talentSearch" template.
//
//
//=====
<!--=====
// START OF ZONE 4A (See above for definition of "4A")
//
//=====
<!--=====
<view-template id="employeeProfile">
  <label>Employee Profile</label>
  <description>Employee Profile</description>
  <edit-template id="personalInformation">
    <label>Personal Information</label>
    <description>Personal Information</description>
    <standard-element-ref refid="username"/>
    <standard-element-ref refid="firstName"/>
    <standard-element-ref refid="mi"/>
    <standard-element-ref refid="lastName"/>
    <standard-element-ref refid="title"/>
    <standard-element-ref refid="jobCode"/>
    <standard-element-ref refid="businessPhone"/>
    <standard-element-ref refid="fax"/>
    <standard-element-ref refid="email"/>
    <standard-element-ref refid="managerid"/>
    <!--<standard-element-ref refid="empld"/>-->
    <standard-element-ref refid="department"/>
    <standard-element-ref refid="division"/>
    <standard-element-ref refid="businessSegment"/>
    <standard-element-ref refid="location"/>
    <standard-element-ref refid="level"/>
    <!--<standard-element-ref refid="serviceDate"/>-->
    <standard-element-ref refid="addressLine1"/>
    <standard-element-ref refid="addressLine2"/>
    <standard-element-ref refid="city"/>
    <standard-element-ref refid="state"/>
    <standard-element-ref refid="zipCode"/>
    <standard-element-ref refid="country"/>
    <standard-element-ref refid="dateOfBirth"/>
    <standard-element-ref refid="ssn"/>
    <standard-element-ref refid="gender"/>
    <standard-element-ref refid="citizenship"/>
    <standard-element-ref refid="nationality"/>
    <standard-element-ref refid="ethnicity"/>
    <standard-element-ref refid="married"/>
    <standard-element-ref refid="minority"/>
    <standard-element-ref refid="hireDate"/>
    <standard-element-ref refid="reviewFreq"/>
    <standard-element-ref refid="lastReviewDate"/>
    <!--<standard-element-ref refid="custom01"/>
    <standard-element-ref refid="custom02"/>
  </edit-template>
</view-template>

```

```

<standard-element-ref refid="custom05"/>
<standard-element-ref refid="custom06"/>
<standard-element-ref refid="custom07"/>
<standard-element-ref refid="custom08"/>
<standard-element-ref refid="custom09"/>
<standard-element-ref refid="custom10"/>
<standard-element-ref refid="custom11"/>
<standard-element-ref refid="custom12"/>
<standard-element-ref refid="custom13"/>
<standard-element-ref refid="custom14"/>
<standard-element-ref refid="custom15"/>-->
<standard-element-ref refid="photo"/>
</edit-template>
<edit-template id="orgChartFields">
  <label>Org Chart Fields</label>
  <description>Data used by Org Chart</description>
  <standard-element-ref refid="talentPool"/>
  <standard-element-ref refid="riskOfLoss"/>
  <standard-element-ref refid="impactOfLoss"/>
  <standard-element-ref refid="reasonForLeaving"/>
</edit-template>
<edit-template id="insideWorkExperience">
  <label>Work Experience Within Organization</label>
  <description>Work Experience Within Organization</description>
  <background-element-ref refid="insideWorkExperience"/>
</edit-template>
<edit-template id="outsideWorkExperience">
  <label>Previous Employment</label>
  <description>Previous Employment</description>
  <background-element-ref refid="outsideWorkExperience"/>
</edit-template>
<edit-template id="education">
  <label>Education</label>
  <description>Education</description>
  <background-element-ref refid="education"/>
</edit-template>
<edit-template id="courses">
  <label>Courses/Continuing Education</label>
  <description>Courses/Continuing Education</description>
  <background-element-ref refid="courses"/>
</edit-template>
<edit-template id="certificates">
  <label>Certificates/Licenses</label>
  <description>Certificates/Licenses</description>
  <background-element-ref refid="certificates"/>
</edit-template>
<edit-template id="languages">
  <label>Language Skills</label>
  <description>Language Skills</description>
  <background-element-ref refid="languages"/>
</edit-template>
<edit-template id="preferredNextMove">
  <label>Preferred Next Move</label>
  <description>Preferred Next Move</description>
  <background-element-ref refid="preferredNextMove"/>
</edit-template>
<!--<edit-template id="bestNextMove">
  <label>Best Next Move</label>
  <description>Best Next Move</description>
  <background-element-ref refid="bestNextMove"/>
</edit-template-->
<edit-template id="mobility">
  <label>Geographic Mobility</label>
  <description>Geographic Mobility</description>
  <background-element-ref refid="mobility"/>
</edit-template>
<edit-template id="awards">
  <label>Awards</label>
  <description>Awards</description>
  <background-element-ref refid="awards"/>
</edit-template>

```

* An <edit-template> may contain (1) mix of <standard-element-ref> and <userinfo-element-ref> or (2) <background-element-ref>. CANNOT MIX <background-element-ref> with <standard-element-ref> nor <userinfo-element-ref>!!!

ULTRA Equivalent to ZONE 4A Plus MORE! – <employeeProfile> in Admin as of August 08 Build



- View-template configuration for just Employee Profile (Zone 4A) has been moved to Admin for ULTRA instances
- Gives customers access to control certain aspects of their Live profile configuration
 - Portlet Names
 - Portlet Descriptions
 - Portlet Order
- Elements must still be defined and permissioned (Zones 1-3) in data model while the layout is controlled in Admin
- All other <view-template> configuration remains in the data model for ULTRA and v10 – directory, talent search and scorecard.
- After loading a data model into an ULTRA instance, layout configuration must be done in Admin



ZONE 4B – “talentSearch” view-template

ZONE 4B

- (4B) Define one special template with id=“talentSearch” and visibility set to “none” for use by the Query Tool.
- NOTE: If one is not defined, the Query Tool will use the template with id=“employeeProfile”.

Parameters for <view-template> include:

- **id (talentSearch) – REQUIRED**

Attributes for <view-template> include:

- **<label> (one value) REQUIRED**
- **<description> (one value)**
- **<edit-template> (one to many)**
 - Parameters for <edit-template> include:
 - **id (one value) – REQUIRED**
 - Attributes for <edit-template>* include:
 - **<label> (one value) REQUIRED**
 - **<description> (one value)**
 - **<standard-element-ref> (zero to many)**
 - SEE ZONE 3 for <standard-element-ref> structure
 - **<userinfo-element-ref> (zero to many)**
 - SEE ZONE 3 for <userinfo-element-ref> structure
 - **<background-element-ref> (zero to many)**
 - SEE ZONE 3 for <background-element-ref> structure

```

// START OF ZONE 4B (See above for definition of "4B")
// =====>
<view-template id="talentSearch" visibility="none">
  <label>Talent Search</label>
  <description>Talent Search Fields</description>
  <edit-template id="personalInformation">
    <label>Personal Information</label>
    <description>Personal Information</description>
    <standard-element-ref refid="title"/>
    <standard-element-ref refid="jobCode"/>
    <standard-element-ref refid="department"/>
    <standard-element-ref refid="division"/>
    <standard-element-ref refid="location"/>
    <standard-element-ref refid="businessSegment"/>
    <standard-element-ref refid="function"/>
    <standard-element-ref refid="level"/>
    <standard-element-ref refid="serviceDate"/>
    <standard-element-ref refid="addressLine1"/>
    <standard-element-ref refid="addressLine2"/>
    <standard-element-ref refid="city"/>
    <standard-element-ref refid="state"/>
    <standard-element-ref refid="zipCode"/>
    <standard-element-ref refid="country"/>
    <standard-element-ref refid="dateOfBirth"/>
    <standard-element-ref refid="gender"/>
    <standard-element-ref refid="citizenship"/>
    <standard-element-ref refid="nationality"/>
    <standard-element-ref refid="ethnicity"/>
    <standard-element-ref refid="married"/>
    <standard-element-ref refid="minority"/>
    <standard-element-ref refid="hireDate"/>
  </edit-template>
  <edit-template id="orgChartFields">
    <label>Org Chart Fields</label>
    <description>Data used by Org Chart</description>
    <standard-element-ref refid="talentPool"/>
    <standard-element-ref refid="riskOfLoss"/>
    <standard-element-ref refid="impactOfLoss"/>
    <standard-element-ref refid="benchStrength"/>
    <standard-element-ref refid="reasonForLeaving"/>
    <standard-element-ref refid="newToPosition"/>
    <standard-element-ref refid="dateOfPosition"/>
    <standard-element-ref refid="futureLeader"/>
    <standard-element-ref refid="matrixManaged"/>
  </edit-template>
  <edit-template id="insideWorkExperience">
    <label>Work Experience Within Organization</label>
    <description>Work Experience Within Organization</description>
    <background-element-ref refid="insideWorkExperience"/>
  </edit-template>
  <edit-template id="outsideWorkExperience">
    <label>Previous Employment</label>
    <description>Previous Employment</description>
    <background-element-ref refid="outsideWorkExperience"/>
  </edit-template>
  <edit-template id="education">
    <label>Education</label>
    <description>Education</description>
    <background-element-ref refid="education"/>
  </edit-template>
  <edit-template id="courses">
    <label>Courses/Continuing Education</label>
    <description>Courses/Continuing Education</description>
    <background-element-ref refid="courses"/>
  </edit-template>
  <edit-template id="certificates">
    <label>Certificates/Licenses</label>
    <description>Certificates/Licenses</description>
    <background-element-ref refid="certificates"/>
  </edit-template>
  <edit-template id="languages">
    <label>Language Skills</label>
    <description>Language Skills</description>
    <background-element-ref refid="languages"/>
  </edit-template>
  <edit-template id="preferredNextMove">
    <label>Preferred Next Move</label>
    <description>Preferred Next Move</description>
    <background-element-ref refid="preferredNextMove"/>
  </edit-template>
  <!--<edit-template id="bestNextMove">
    <label>Best Next Move</label>
    <description>Best Next Move</description>
    <background-element-ref refid="bestNextMove"/>
  </edit-template-->
  <edit-template id="mobility">
    <label>Geographic Mobility</label>
    <description>Geographic Mobility</description>
    <background-element-ref refid="mobility"/>
  </edit-template>
  <edit-template id="awards">
    <label>Awards</label>
    <description>Awards</description>
    <background-element-ref refid="awards"/>
  </edit-template>
  <edit-template id="memberships">
    <label>Memberships</label>
    <description>Memberships</description>
    <background-element-ref refid="memberships"/>
  </edit-template>
  <edit-template id="sysOverallPotential">
    <label>Potential</label>
    <description>Potential Trend</description>
    <background-element-ref refid="sysOverallPotential"/>
  </edit-template>
  <edit-template id="sysOverallPerformance">
    <label>Performance</label>
    <description>Performance Trend</description>
    <background-element-ref refid="sysOverallPerformance"/>
  </edit-template>
  <!--<edit-template id="sysOverallObjective">
    <label>Overall Objective</label>
    <description>Overall Objective Rating</description>
    <background-element-ref refid="sysOverallObjective"/>
  </edit-template-->
  <edit-template id="sysOverallCompetency">
    <label>Overall Competency</label>
    <description>Overall Competency Rating</description>
    <background-element-ref refid="sysOverallCompetency"/>
  </edit-template-->
</view-template>
/succession-data-models

```

* An <edit-template> may contain (1) mix of <standard-element-ref> and <userinfo-element-ref> or (2) <background-element-ref>. CANNOT MIX <background-element-ref> with <standard-element-ref> nor <userinfo-element-ref>!!!

ZONE 4C – “employeeScoreCard” view-template



ZONE 4C

- (4C) Define one special template with id="employeeScoreCard" for use as the Employee Scorecard. It should contain only one <edit-template> and nothing but scorecard portlets.

Parameters for <view-template> include:

- **id (employeeScoreCard) – REQUIRED**

Attributes for <view-template> include:

- **<label> (one value) REQUIRED**
- **<description> (one value)**
- **<edit-template> (one)**
 - Parameters for <edit-template> include:
 - **id (one value) – REQUIRED**
 - Attributes for <edit-template>* include:
 - **<label> (one value) REQUIRED**
 - **<description> (one value)**
 - **<background-element-ref> (zero to many)**

```
<!--=====
//
// START OF ZONE 4C (See above for definition of "4C")
//
//=====-->
<view-template id="employeeScoreCard" visibility="none">
  <label>View Template for Employee Scorecard</label>
  <description>This view Template for Employee Scorecard should have only 1 edit template</description>
  <edit-template id="scorecardEditTemplate">
    <label>Edit Template for Employee Scorecard</label>
    <description>Edit Template for Employee Scorecard</description>
    <background-element-ref refid="sysScoreCardOverviewPortlet"/>
    <background-element-ref refid="sysScoreCardContactPortlet"/>
    <background-element-ref refid="sysScoreCardOrgProfilePortlet"/>
    <background-element-ref refid="sysScoreCardExpSnapshotPortlet"/>
    <background-element-ref refid="sysScoreCardPerfHistoryPortlet"/>
    <background-element-ref refid="sysScoreCardCompetenciesPortlet"/>
    <background-element-ref refid="sysScoreCardCompBehaviorPortlet"/>
    <background-element-ref refid="sysScoreCardObjRatingsPortlet"/>
  </edit-template>
</view-template>
```



ZONE 4D – “User Directory” view-template

ZONE 4D

- (4D) Define one special template with id="sysUserDirectorySetting" to include standard "directory" fields. It should contain
 - one <edit-template> for all standard elements to be in the Employee Data file -<view-template id="employeeScoreCard" visibility="none" pdf-printing-enabled="false" (on right)
 - and one <edit-template> to state which elements should be visible <edit-template id="sysVisibleUserDirectorySetting"> <label>User Directory Setting(Visible)</label>

Parameters for <view-template> include:

- **id (sysUserDirectorySetting) – REQUIRED**

Attributes for <view-template> include:

- **<label> (one value) REQUIRED**
- **<description> (one value)**
- **<edit-template> (one)**
 - Parameters for <edit-template> include:
 - **id (one value) – REQUIRED**
 - Attributes for <edit-template>* include:
 - **<label> (one value) REQUIRED**
 - **<description> (one value)**
 - **<standard-element-ref> (zero to many)**
 - Parameters for <standard-element-ref> include:
 - » **refid (one value) – REQUIRED**

```

<!--=====
//
// START OF ZONE 4D (See above for definition of "4D")
//
//=====-->
<view-template id="sysUserDirectorySetting" visibility="none" pdf-printing-enabled="false">
  <label>User Directory Setting</label>
  <description>User Directory Setting</description>
  <edit-template id="sysAllUserDirectorySetting">
    <label>User Directory Setting(Entire Ordered List)</label>
    <description>User Directory Setting(Entire Ordered List</description>
    <standard-element-ref refid="username"/>
    <standard-element-ref refid="firstName"/>
    <standard-element-ref refid="lastName"/>
    <standard-element-ref refid="mi"/>
    <standard-element-ref refid="gender"/>
    <standard-element-ref refid="email"/>
    <standard-element-ref refid="managerId"/>
    <standard-element-ref refid="hrlD"/>
    <standard-element-ref refid="location"/>
    <standard-element-ref refid="division"/>
    <standard-element-ref refid="department"/>
    <standard-element-ref refid="jobCode"/>
    <standard-element-ref refid="timeZone"/>
    <standard-element-ref refid="hireDate"/>
    <standard-element-ref refid="empld"/>
    <standard-element-ref refid="title"/>
    <standard-element-ref refid="businessPhone"/>
    <standard-element-ref refid="fax"/>
    <standard-element-ref refid="addressLine1"/>
    <standard-element-ref refid="addressLine2"/>
    <standard-element-ref refid="city"/>
    <standard-element-ref refid="state"/>
    <standard-element-ref refid="zipCode"/>
    <standard-element-ref refid="country"/>
    <standard-element-ref refid="reviewFreq"/>
    <standard-element-ref refid="lastReviewDate"/>
    <standard-element-ref refid="custom01"/>
    <standard-element-ref refid="custom02"/>
    <standard-element-ref refid="custom03"/>
  </edit-template>
</view-template>

```

- Download the data model
 - 1. Company Settings, Import/Export Data Model
 - 2. Export file, Save on your hard drive in xml format.



- 3. Start your own version control naming convention
- 4. Upload a “zoned” data model, if available

LP Exercise 1(v10): Section Layout Order—move background section – v10 instances



Success
Factors

Customer wants to move “Functional Experience” from after “Preferred Next Move” to after “Work Experience Within Company”

Before

BROOKE BROWN Save Cancel Print Preview

Profile Scorecard Notes History

Courses/Continuing Education Click below to edit

Add

Courses/Continuing Education

Course Name*	Instructor Led or Self-Study	Class Hours	End Date	Credits/CEU
--------------	------------------------------	-------------	----------	-------------

Certificates/Licenses Click below to edit

Certificates and/or Licenses - If any information in this section is incorrect please contact your Human Resources Representative

Certificate/License	Effective Date	Expiration Date	ID Number	State Issued
---------------------	----------------	-----------------	-----------	--------------

Language Skills Click below to edit

Language Skills - If any information in this section is incorrect please contact your Human Resources Representative

Language	Speaking Proficiency	Reading Proficiency	Writing Proficiency
----------	----------------------	---------------------	---------------------

Preferred Next Move Click below to edit

Add

Preferred Next Move

Level*	Department	Division	Location Preference
--------	------------	----------	---------------------

Functional Experience Click below to edit

Add

List your Functional Experience during your entire career. You may make several entries

Function*	Years of Experience*	Role*	Annual Budget Responsibility*
-----------	----------------------	-------	-------------------------------

```
<edit-template id="funcExperience">
<label>Functional Experience</label>
<description>List your Functional Experience during your enti
<background-element-ref refid="funcExperience"/>
</edit-template>
```

After

BROOKE BROWN Save Cancel Print Preview

Profile Scorecard Notes History

Work Experience Within Company Click below to edit

Add

Work Experience Within Company

From Date	Title	Department
-----------	-------	------------

Functional Experience Click below to edit

Add

List your Functional Experience during your entire career. You may make several entries

Function*	Years of Experience*	Role*	Annual Budget Responsibility*
-----------	----------------------	-------	-------------------------------

Previous Employment Click below to edit

Add

Previous Employment

From Date*	End Date*	Company Name*	Type of Business*	Title
------------	-----------	---------------	-------------------	-------

Education Click below to edit

Add

Education - If any information in this section is incorrect please contact your Human Resources Representative

School	Major	Highest Degree Attained	Date
--------	-------	-------------------------	------

Courses/Continuing Education Click below to edit

Add

Step 1: **Load** the data model file, “ZONED Data Model for Case Study 1 starting point_Aug08.xml” into your ACEtrain instance

Step 2: **View** the Live Profile in your ACEtrain site to verify the order of sections

Step 3: **Open up** the data-model in an editor

Step 4: **Locate in Zone 4A** the <edit-template> for **Functional Experience** within <view-template id="employeeProfile">

- What's the edit-template id? [funcExperience]
- What's the label, visible in the left nav in v10? [Functional Experience]
- What's the description, visible when a user adds/edits rows in this section? [List your entries.]
- What's the background-element-ref refid, referring to something defined in Zone 2? [funcExperience]

Step 5: **Move entire** <edit-template> for **Functional Experience** within <view-template id="employeeProfile">

Step 6: **Save and upload** your XML, open Live Profile and **test** your work

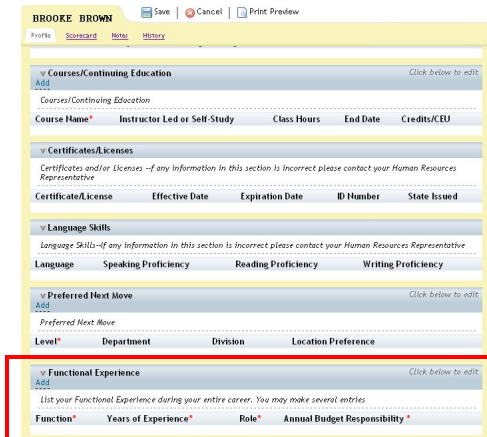


- We have some set-up to do in Admin before we can proceed with Exercise 1 for an ULTRA instance
- Log in as your favorite manager
- Look at the Employee Files Profile for yourself and direct reports
- Why don't you see any Background Elements? (courses, education, etc...?)
- Where do we fix this?

LP Exercise 1(ULTRA): Section Layout Order—move background section – **ULTRA instances 0808 Build**

Customer wants to move “Functional Experience” from after “Preferred Next Move” to after “Work Experience Within Company”

Before



BROOKE BROWN Save Cancel Print Preview

Profile Scorecard Notes History

Courses/Continuing Education [Click below to edit](#)

Add

Courses/Continuing Education

Course Name*	Instructor Led or Self-Study	Class Hours	End Date	Credits/CEU
--------------	------------------------------	-------------	----------	-------------

Certificates/Licenses [Click below to edit](#)

Certificates and/or Licenses - If any information in this section is incorrect please contact your Human Resources Representative

Certificate/License	Effective Date	Expiration Date	ID Number	State Issued
---------------------	----------------	-----------------	-----------	--------------

Language Skills [Click below to edit](#)

Language Skills - If any information in this section is incorrect please contact your Human Resources Representative

Language	Speaking Proficiency	Reading Proficiency	Writing Proficiency
----------	----------------------	---------------------	---------------------

Preferred Next Move [Click below to edit](#)

Add

Preferred Next Move

Level*	Department	Division	Location Preference
--------	------------	----------	---------------------

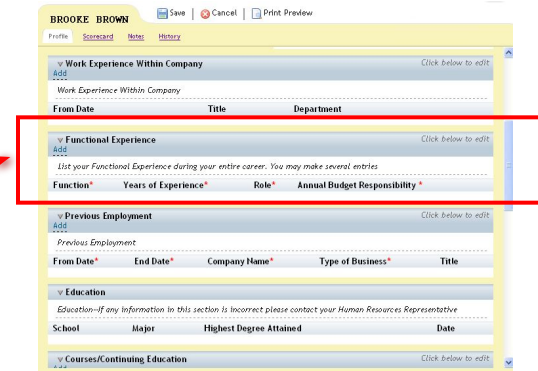
Functional Experience [Click below to edit](#)

Add

List your Functional Experience during your entire career. You may make several entries

Function*	Years of Experience*	Role*	Annual Budget Responsibility *
-----------	----------------------	-------	--------------------------------

After



BROOKE BROWN Save Cancel Print Preview

Profile Scorecard Notes History

Work Experience Within Company [Click below to edit](#)

Add

Work Experience Within Company

From Date	Title	Department
-----------	-------	------------

Functional Experience [Click below to edit](#)

Add

List your Functional Experience during your entire career. You may make several entries

Function*	Years of Experience*	Role*	Annual Budget Responsibility *
-----------	----------------------	-------	--------------------------------

Previous Employment [Click below to edit](#)

Add

Previous Employment

From Date*	End Date*	Company Name*	Type of Business*	Title
------------	-----------	---------------	-------------------	-------

Education [Click below to edit](#)

Add

Education - If any information in this section is incorrect please contact your Human Resources Representative

School	Major	Highest Degree Attained	Date
--------	-------	-------------------------	------

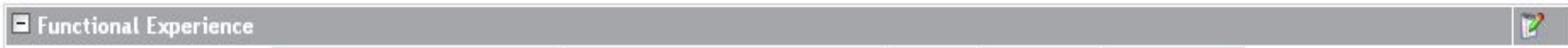
Courses/Continuing Education [Click below to edit](#)


Add

Courses/Continuing Education

Step 1: In your ACEtrain instance go to Admin Tools Configure Scorecard Click to Edit Profile.

Step 2: Find the section that you wish to move and use the arrows on the right to move it up and down.



Functional Experience 

Step 3: **Scroll and Save** the dashboard changes at either the top or bottom of the page. It is very easy to miss this step!

Save Dashboard

Step 4: Go to Employee Files Profile and scroll down to see your changes.

LP Exercise 2(v10): Rename a Background Element

– v10



Success
Factors

Customer requests:

1. rename “**Work Experience Within Company**” section to “**Work Experience Within Organization as of 1998--If information is incorrect contact your HR Rep**”;
2. rename the Description to “**Work Experience Within Organization**”;

Before

From Date	Title	Department
	Work Experience Within Company	

```
<edit-template id="insideWorkExperience">  
<label>Work Experience Within Company</label>  
<description>Work Experience Within Company</description>  
<background-element-ref refid="insideWorkExperience"/>  
</edit-template>
```

After

From Date	Title	Department
	Work Experience Within Organization as of 1998 -- If this information is incorrect, contact your HR Rep	

```
<edit-template id="insideWorkExperience">  
<label>Work Experience Within Organization as of 1998 -- If this information is incorrect, cont  
<description>Work Experience Within Organization</description>  
<background-element-ref refid="insideWorkExperience"/>  
</edit-template>
```

Step 1: **Open** your data-model xml in an xml editor

Step 2: **Locate in Zone 4A** the <edit-template> block for “**insideWorkExperience**”

Step 3: **Locate** the <label> element that contains the value “**Work Experience Within Company**”

Step 4: **Relabel** as specified above

Step 5: **In the same section, Locate** <description> element that contains the value “**Work Experience Within Company**”

Step 7: **Relabel** as **Work Experience Within Organization**

Step 8: **Save and upload** your XML, open Live Profile and **test** your work

LP Exercise 3: Remove Fields from a Section



Success
Factors

Customer requests to remove “Reading Proficiency” and “Writing Proficiency” from Language Skills

Before

Language Skills			
Language Skills--if any information in this section is incorrect please contact your Human Resources Representative			
Language	Speaking Proficiency	Reading Proficiency	Writing Proficiency

```
<background-element id="languages" type-id="7">
<label>Language Skills</label>
<data-field id="language" field-name="vfld1" required="true">
<label>Language </label>
<picklist id="language"/>
</data-field>
<data-field id="proSpeak" field-name="vfld2" required="true">
<label>Speaking Proficiency</label>
<picklist id="proficiencyList"/>
</data-field>
<data-field id="proRead" field-name="vfld3" required="true">
<label>Reading Proficiency</label>
<picklist id="proficiencyList"/>
</data-field>
<data-field id="proWrite" field-name="vfld4" required="true">
<label>Writing Proficiency</label>
<picklist id="proficiencyList"/>
</data-field>
</background-element>
```

After

Language Skills	
Language Skills--if any information in this section is incorrect please contact your Human Resources Representative	
Language	Speaking Proficiency

```
<background-element id="languages" type-id="7">
<label>Language Skills</label>
<data-field id="language" field-name="vfld1" required="true">
<label>Language </label>
<picklist id="language"/>
</data-field>
<data-field id="proSpeak" field-name="vfld2" required="true">
<label>Speaking Proficiency</label>
<picklist id="proficiencyList"/>
</data-field>
<!--<data-field id="proRead" field-name="vfld3" required="true">
<label>Reading Proficiency</label>
<picklist id="proficiencyList"/>
</data-field>
<data-field id="proWrite" field-name="vfld4" required="true">
<label>Writing Proficiency</label>
<picklist id="proficiencyList"/>
</data-field-->
</background-element>
```

Step 1: **Locate in Zone 2A** the <background-element> block for “languages”

Step 2: **Locate** the correct <data-field> blocks for **Reading Proficiency** and **Writing Proficiency** within the <background-element> block

Step 3: **Comment out*** each of the two entire <data-field> blocks from Step 2 (see next page for more info)

Step 5: **Save and upload** your XML, open Live Profile and **test** your work



“Commenting Out” code

- **Commenting out XML code is similar to deleting the XML code.**
- **Both methods work. However, most people prefer to comment out the XML code (vs. deleting) in case the customer changes their mind at a later time.**
- **If that did happen, you would simply need to remove the XML comment indicators (ex: `<!-- These are XML comment indicators-->`).**
- **Note that with most XML editors, when the data model is exported from the instance, the commented-out code is stripped out entirely. This is a good reason to try to use the original Zoned version as long as possible.**

LP Exercise 4: Rename a Field in a Section



Success
Factors

Customer requests to rename “Speaking Proficiency” to “Fluency Level” within “Language Skills” section

Before

▼ Language Skills
Language Skills--If any information in this section is incorrect please contact your Human Resources Representative

Language	Speaking Proficiency
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```
<data-field id="proSpeak" field-name="vfld2" required="true">
  <label>Speaking Proficiency</label>
  <picklist id="proficiencyList"/>
</data-field>
```

After

▼ Language Skills
Language Skills--If any information in this section is incorrect please contact your Human Resources Representative

Language	Fluency Level
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```
<data-field id="proSpeak" field-name="vfld2" required="true">
  <label>Fluency Level</label>
  <picklist id="proficiencyList"/>
</data-field>
```

Step 1: **Locate in Zone 2A** the <background-element> block for “languages”

Step 2: **Locate** the <data-field> block for **Speaking Proficiency** within the <background-element> block

Step 3: **Locate** the <label> element within the <data-field> block from Step 2

Step 4: **Rename Speaking Proficiency** value to **Fluency Level**

Step 5: **Save and upload** your XML, open Live Profile and **test** your work