

Lesson Objectives



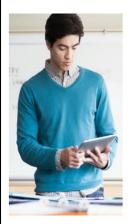
After completing this lesson, participants will be able to -

- Understand an overall about SF Employee Central System
- Understand the Basics of Employee Central System
- Log on to Successfactor Platform and do the Basic Navigations

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Event and Event Reason Administration





EC is a Human Resource Information System (HRIS) and a way for you to track the changes to an employee record or your company structure over time. Events and event reasons allow you to keep track of changes to an employee record.

This is important for two reasons:

- It keeps clear reporting about what changes were made.
- 2. It helps you to comply with legal or corporate policy regarding employee changes.

These events and event reasons also play a role in how self-service is configured in your system. You can see these events and event reasons when you make changes and these might be visible to your managers and employees as they work through self-service.

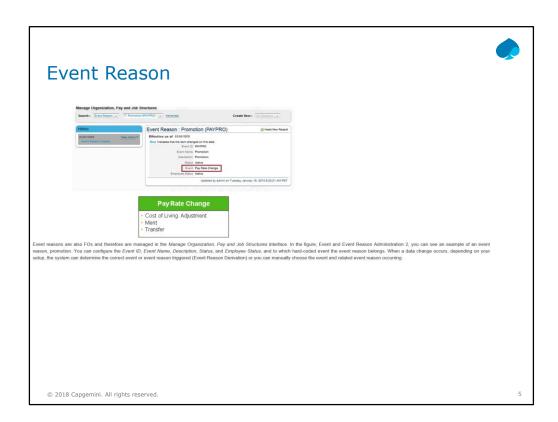
Events are hard coded in the system. The full list can be seen in the event picklist. You can deactivate events your customer chooses not to use, and you can also rename events.

It is very important to note that you should never create new events. The list that is delivered by SAP Successfactors contains the only events you can use in the system.

Because of the restriction on creating new events, event reasons were created. Event reasons can be built directly in the instance, and are used to differentiate between certain actions in the system. For example, if we look at the figure Event and Event Reason Administration 1, we can see the event Termination. In order to differentiate between the different types of Termination (voluntary vs involuntary, retirement, lost to competitor) we can create multiple event reasons and tie them back to the one Termination event.

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Event and Event Reason Administration 1 Leave of Absence Business Unit Education New Hire Long Term Disability Military Service Change Contractor · Correction - Status Onboarding Reorganization **Pay Rate Change Termination** Cost of Living Voluntary Career Office Location Adjustment Development Change Merit Retirement Promotion © 2018 Capgemini. All rights reserved.





Event and Event Reason Configuration



For reporting purposes, one event and event reason must be field to each transaction, or change of employee data, that occurs in the system.

Event Reason Derivation (ERD) is a process that can be set up for your customer. It essentially tells the system the correct event, event reason, and workflow configuration (if needed) that should be triggered based on the type of transaction occurring in an employee's job or compensation sections. ERD requires a lot of initial subty, since each possible data change that could in those employee pottest must be teld to a specific eventivevent reason. For example, the system needs to be able to differentiate between employee transfers, promotions, location changes, explosition changes, etc. Customers who wast ERD set up for their system should first determine the event reasons they need to cover all types of changes in the system, then the triggers or field changes associated with each event reasons.

Although ERD setup requires more effort before go live, it greatly improves transaction accuracy, especially for Manager Self Service. Rather than a manager simply guessing which event and event reason is triggered, the system follows a set of pre-defined rules to accurately define what type of action is occurring. This greatly improves reporting on employee changes, which can help customers have a better understanding of what is occurring within their company.

If a customer chooses to not use ERD, the Event and Event Reason will always be chosen by the user initiating the transaction. Business rules can still be configured to the the event reason chosen to a workflow configuration, to ensure the transaction goes through the appropriate appropriate paceporal process before its active.



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Event Reason Derivation



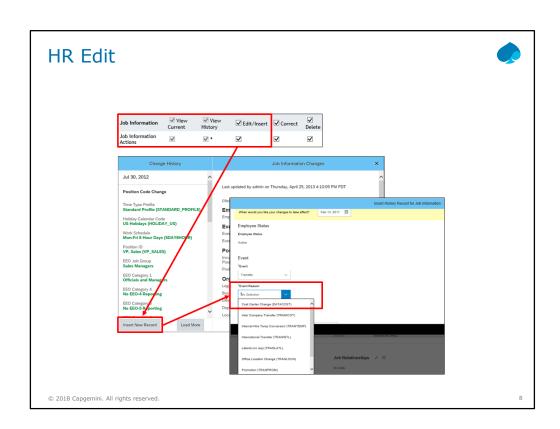
No Event Reason Derivation

- Event and Event
 Reasons are manually
 chosen for changes
 made to Employee Data
- Use Business Rules to connect Workflow to triggered Event Reason
- Quicker, more simplified solution

Event Reason Derivation (Preferred)

- Use Business Rules to trigger an Event, Event Reason and Workflow based on changes made to Employee Data
- Requires more initial setup
- More accurate reporting
- User-friendly

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HR Edit



Even with Event Reason Derivation turned on, those given the RBP rights to Insert New Records from the history of a portlet have the ability to bypass this process. If you do not go through the Take Action button available on employee fles, you will manually choose the event and related event reason for the change you are making. Once you update the necessary fields and click Save, the change is automatically stored, and no workflow is triggered. This is referred to as an "HR Edit" and this capability should only be given to a more administrative audience.

To review, if ERD is turned on and the individual performing the change navigates through Take Action, then the system chooses the correct event and event reason, and triggers a workflow if one is configured for that particular change. If the individual navigates through History —Insert New Record, then they must manually choose the event and event reason, and no workflow is ever triggered.

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ERD Provisioning Setup



Event Reason Derivation setup for all new customers

- Effective Dated Data Platform
 Enable Effective Dated fields in Basic Import
- # Enable Effective Date fields in Basic Import
 Employee Central V (i.e., Action Driver) requires Effective Date Data Platform
 Employee Central V (i.e., Action Driver) requires Employee Sentence Date Data Platform
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Event Reason Derivation setup for some legacy customers

Employee Central

Effective Dated Data Platform

Enable Effective Dated fields in Saist Import

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No Event Reason Derivation

- yell Effective Dued Data Platform

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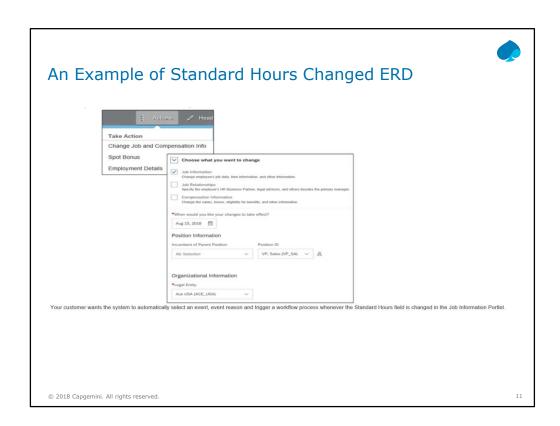
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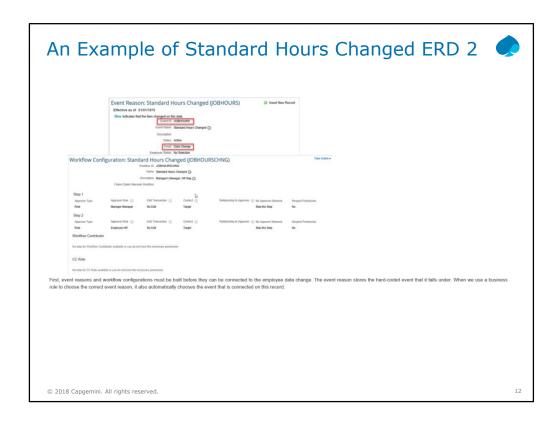
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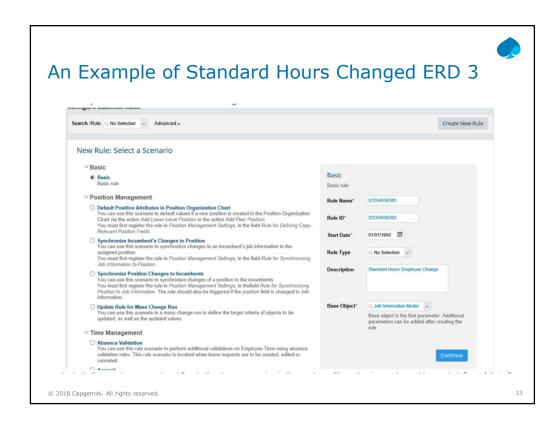
In the Figure, ERD Provisioning Setup, you can see all of the options for setting up ERD within Company Settings in Provisioning

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The above applications are called the functional areas, or application areas, or at times the functional modules of R/3. All of these terms are synonymous with each other.





An Example of Standard Hours Changed ERD 3

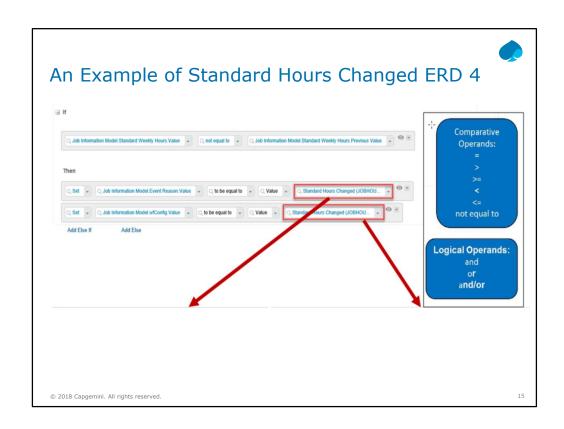


In order to tie the event reason and workflow to the change occurring in the employee files, a business rule must be created. From Admin Center, navigate to Configure Business Rules. This will take you to Business Rules Admin tool. You must then click on the plus sign to add a new rule. Because the rule is not related to time off or position management, the Basic rule type is chosen. To create the rule, give it a descriptive name and ID. The ID cannot have any spaces within the name, or it will not trigger correctly. The Rule Type field is optional. This categorizes the rule, so that rules can be grouped together and reported on more easily. You can create new rule types in the Rule Type picklist.

The base object chosen should be where the change is occurring. There are two related to the Job Information portlet: Job Information, and Job Information Model. The Model base objects are used to set field properties for EC objects (for example, making a field mandatory, or hiding fields) OR compare the a changed value with the previous value. Each EC object is defined once as a base object, and then as a Model base object.

Because we are changing the value of a field, but not specifying what the new value will be, we must use the Job Information Model base object. This introduces comparative functions such as value and previous value that will track change in a field. Rules for Event Reason Derivation should use the model version of base objects.

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An Example of Standard Hours Changed ERD 4



Event Reason: Standard Hours Changed (JOBHOURS)

Effective as of 0101/1970

Dive indicates that the item changed on this date

Event Name: Standard Hours Changed (JOBHOURSCHING)

This indicates that the item changed on this date

Event Name: Standard Hours Changed (JOBHOURSCHING)

Fishes Didde Alternative Workflow

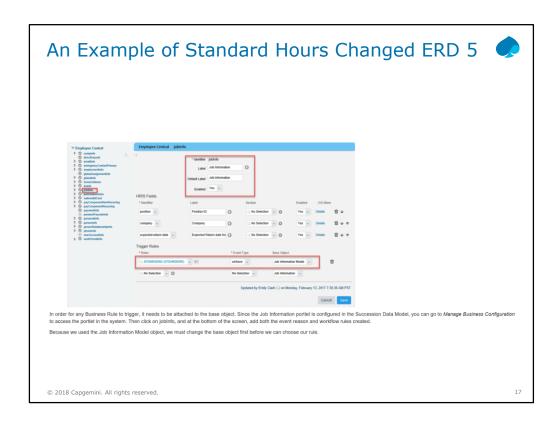
Falses Didde Alternative Workflow

Once the Business Rules details are configured, we are taken to the IF/THEN statement section.

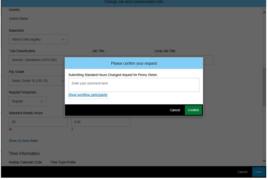
The IF statement is the change in the portlet that is going to trigger the event reason. In this scenario, the value Standard Weekly Hours is changing, so it cannot be equal to its previous value. Using value and previous value allows us to demonstrate a change to a field without having to specify what the new value should be. You can use a mix of the comparative and logical operands shown on the screen to build the conditions for when this rule should trigger.

The THEN statement is where you set the event reason and workflow configuration values to be the records you created in Manage Organization Pay and Job Structures. It is not necessary to include a workflow in every scenario. It is only necessary when additional approval is required for a change.

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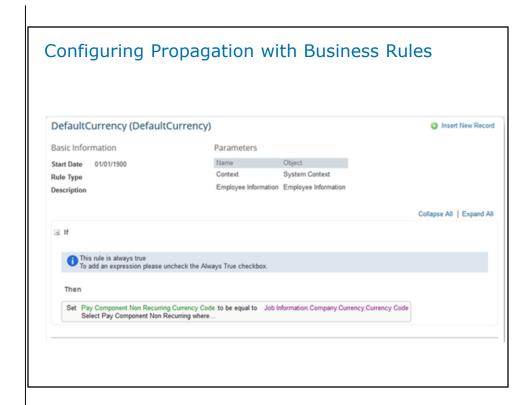


An Example of Standard Hours Changed ERD 6



After all of the configuration work is completed, then the rule must be tested. In order to test out Event Reason Derivation, you must go through Take Action—Change Job and Compensation Information. In our example, when we update the Standard Hours and click save, the system automatically confirms that the Standard Hours Changed event reason was chosen, and the correct workflow is triggered.

Summary	
You should now be able to: Create an event reason	



Business Rule for Propagation



You can define propagation rules to have the system automatically copy over the data from one field to another field. This way you can have the same data in several places of the system, while keeping just one data record.

Here are some examples for typical use cases:

Example 1: Update Job Codes in Employee Central

IF....

the jobcode is changed in Employee Central

THEN

retrieve all the job-code-related data from the job-related foundation objects to update the data in the Employee Central

Example 2: Propagate FLSA Status

F

the country is USA

AND the job classification is changed

THEN...

propagate the FLSA status to jobInfo

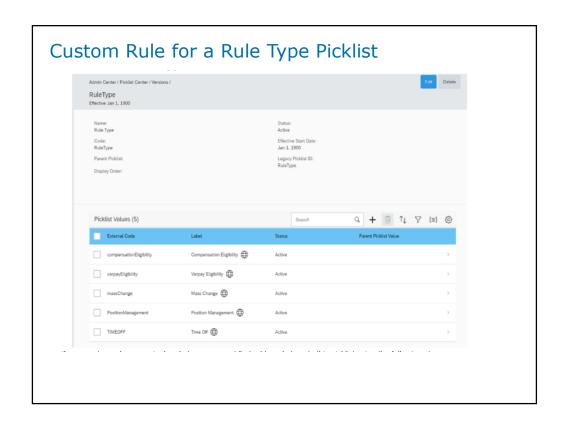
• Example 3: Propagate Standard Hour

IF...

the legal entity is changed in Employment Info

THEN...

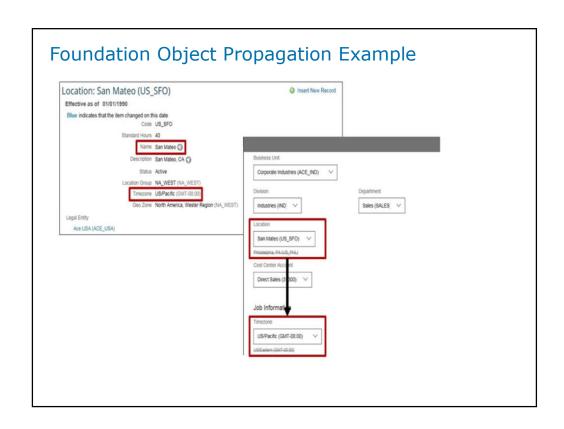
propagate the standard hour to Employment Info



Custom Rule for a Rule Type Picklis

To classify our custom rules as a single rule type, we must first add a rule type to this picklist using the following steps:

- 1. Navigate to Picklist Center.
- 2. Search for "rule type".
- On this picklist, navigate to Take Action → Make Correction.
- 4. In the last field of the values section, add the external code and label for your custom rule type. For this rule, the external code is "startdate" and the label is "New Position Start Date".
- 5. Click Save.



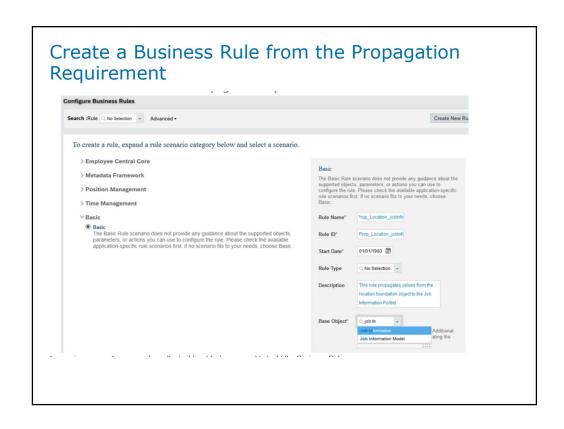
Foundation Object Propagation

For the configuration of the business rule, we need to determine the appropriate fields required on the Foundation Object (source of the data value) and the Portlet (destination of the data value). In the example, we and to copy the timezone value from the Location Foundation Object Records to the timezone field in the Job Information Portlet. This is based upon the selection of a record in the location field of the Job Information Portlet. This can be summarized in the following table:

	Object / Portlet	Field
When I select a Foundation Object record in this field	Job Information	Location
Copy the value from the field	Location	Timezone
To the field:	Job Information	Timezone

We use the information to create a business rule that will apply the propagation.

Employee Central has limited support for cross portlet rules. Cross-portlet rules can set values for fields in a different portlet. Currently it is supported only for specific employment-related entities which includes Job information, Compensation information, Pay component Recurring, Pay Component Non Recurring, Job Relationships and Employment Details. Even if the portlet support cross portlet rules, there still are limitations to what can actually be performed. You subsenses Rules documentation and SAP Support sits for more specific information.



Create a Business Rule from the Propagation Requirement

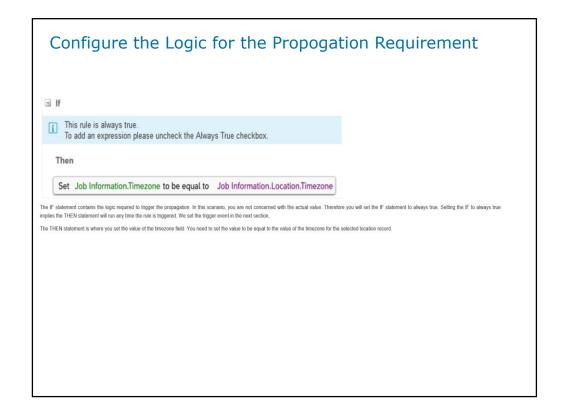
From the previous example, we now have the building blocks we need to build the Business Dule

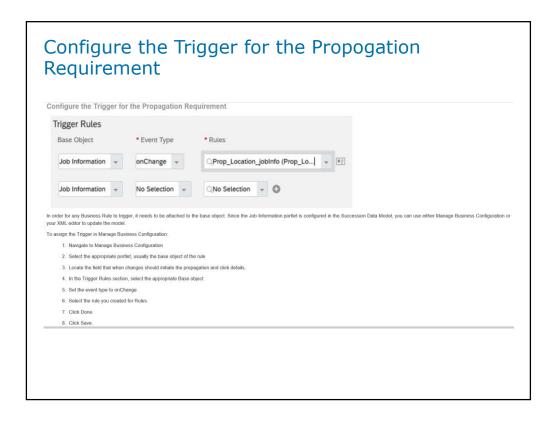
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- Navigate to Configure Business Rules. This will open the Business Rules Admin tool.
- 2. Click on the plus sign to add a new rule.
- 3. Select the Basic scenario
- 4. Type in the information for the Name and ID
- 5. Leave the start date as Jan 1 1900.
- 6 Ontionally Select a Rule Type
- 7. Type in a detailed description
- 8. Select the appropriate Base Object





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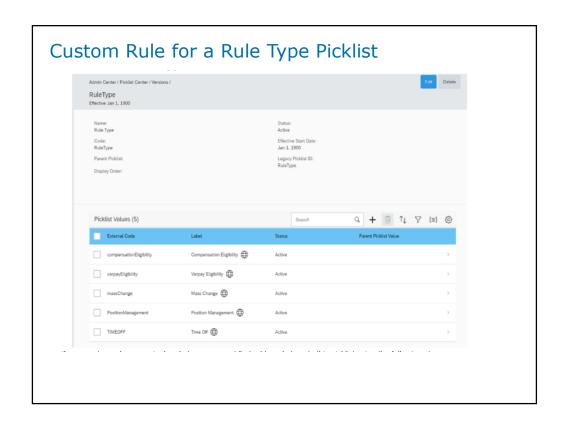
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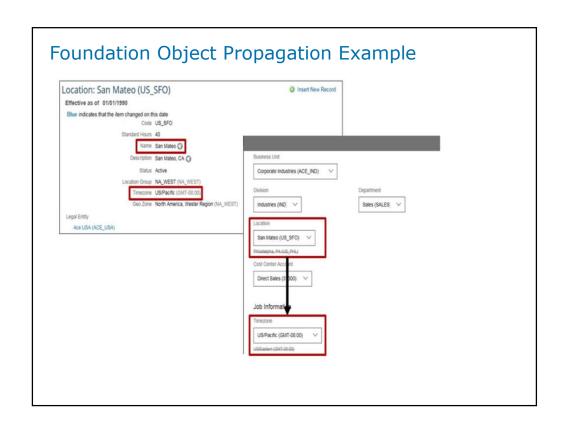
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Foundation Object Propagation



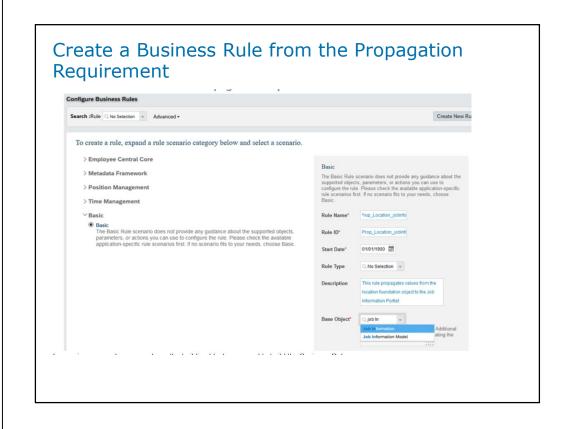
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