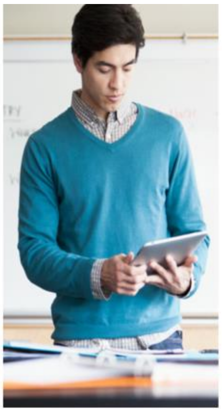
SuccessFactors Employee Central RBP_Business Rules

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

Administrator Types



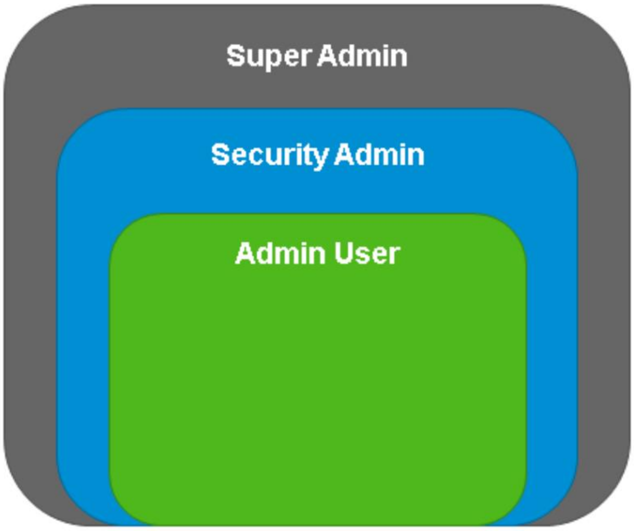
Employee Central (EC) has several types of administrators as shown in the figure, Administrator Types.

The first level is an Admin User. An Admin User has access to functionality on the Admin page. For example, you can set up an Admin User who manages the performance and goals functionality for a company.

The second level is a Security Admin. A Security Admin is responsible for managing security using roles and permission groups in the RBP framework. A Security Admin has access to *Manage Permission Roles* and *Manage Permission Groups*.

The highest level is a Super Admin. The Super Admin is set up using Provisioning or by another Super Admin in *Manage Role-Based Permission Access*. A Super Admin can grant an employee the permission to operate at any administrator level. A Super Admin has access to *Manage Role-Based Permission Access*.

Administrator Types



 4

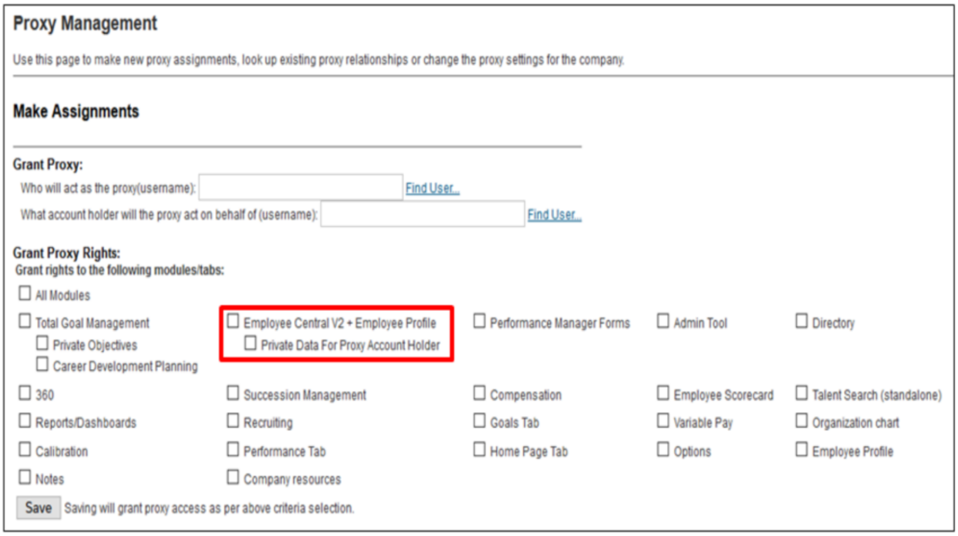
Proxy Roles

Proxies are useful in EC. There are typically two roles in proxy. The Account Holder owns the account and has the rights to view and edit information. A user who has Proxy rights for an Account Holder can choose Proxy and open, view, edit, or send any item in the modules for which the user has permissions. In EC, an additional setting is available for Employee Central and Employee Profile data. When *Private Data For Proxy Account Holder* is deselected, the proxy does not have access to potentially sensitive information such as home address or compensation.

More information

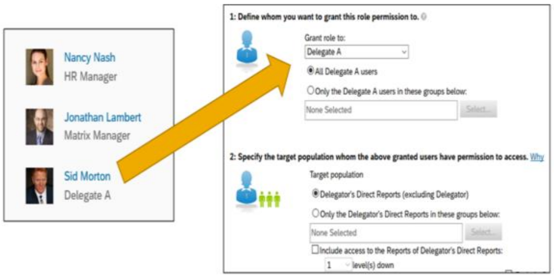
The *Help & Resources* section in *Admin Center* provides further information about proxies and proxy management.

Proxy Roles



 6

Delegate Relationship

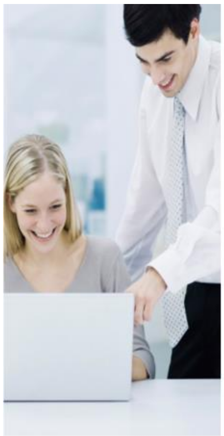


You can configure delegates to perform actions on anther user's behalf that affects other employees in your organization.

You can use the Delegate A and Delegate B relationship roles to assign permissions to up to two individuals for each role, allowing them to act as delegates. The delegate users will have access to direct and indirect reports of the delegator and can perform tasks that have been permitted to perform. You can assign the two delegates separate tasks or permissions to cover different functional or regional areas.

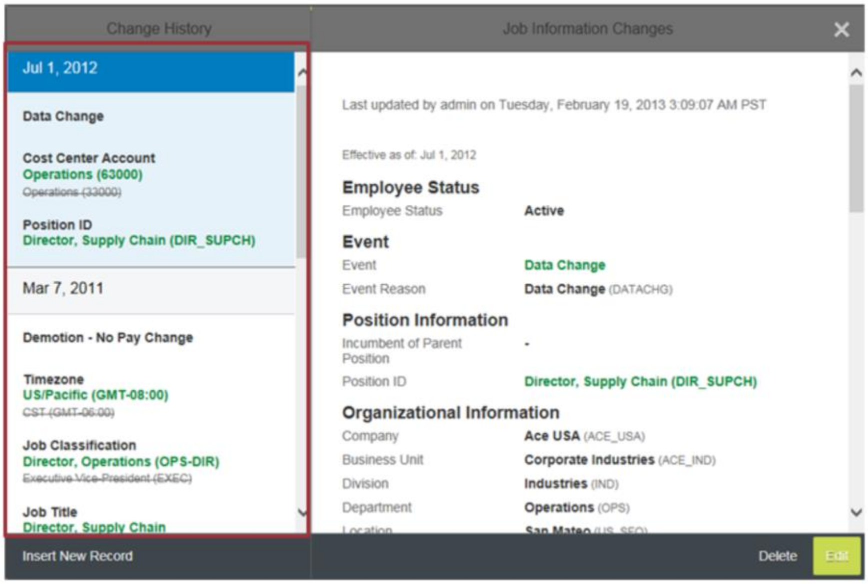
Delegates differ from proxies in that proxies get the permission of the account holder, while delegates only have the explicit permissions assigned via RBP roles.

EC Historical Change Tracking



The EC platform is effective-dated across many of the Foundation Objects (FO) and employee records, which means that EC stores records and changes in a global system. When a new record is inserted, the previous record is closed. How do you know who is making those changes and when? For most effective-dated entities in the system, EC provides a high-level overview of changes in the *History* section of the instance. Permissioned users can also access *Audit Reports* for a more in-depth look at changes.

EC Historical Change Tracking



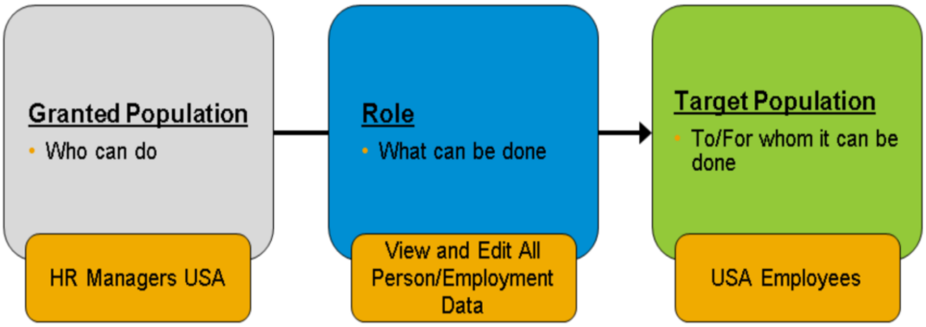
 9

RBP Overview

RBP is a customizable method of managing permissions in your company. Traditionally, HR managers are assigned the same permissions. However, you can use RBP to grant control at a granular level based on the specific work that a person does. You can define roles based on job codes, locations, relationships, and more. This granularity allows the groups to be both targeted and dynamic. For example, you can create permissions for HR managers in the USA that enable them to view and edit person and employment data for all of their employees in the USA.

Enabling RBP in provisioning is a required to enable Employee Central.

RBP


Granted Population
Who can do
HR Managers USA
Role
What can be done
View and Edit All Person/Employment Data
Target Population
To/For whom it can be done
USA Employees

 11

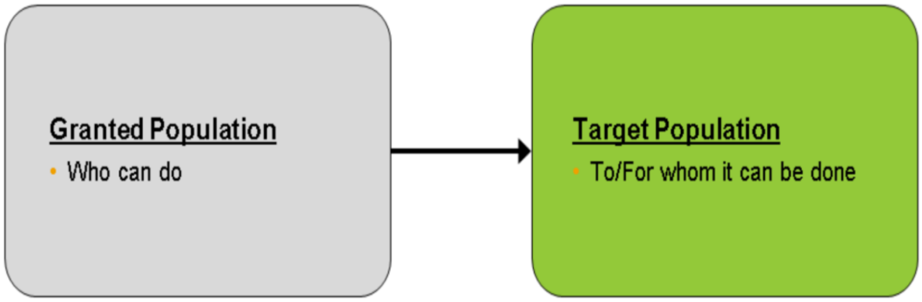
Permission Groups

Permission Groups allow you to define employees in the Granted Population and Target Population roles. You can create these groups based on single or multiple parameters. For example, you can create a group of IT managers based on the job code IT-MGR. You can also create a group of IT managers in the USA based on job code and location. Permission Groups are an integral part of RBP. However, they might not be necessary if you are working with general conditions such as *All Employees* or *Manager's Direct Reports*, which are predefined roles in the system. .

12

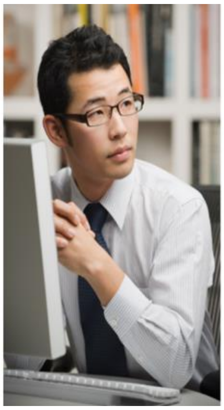
The above applications are called the functional areas, or application areas, or at times the functional modules of R/3. All of these terms are synonymous with each other.

Permission Groups



 13

Best Practices for Naming Permission Groups



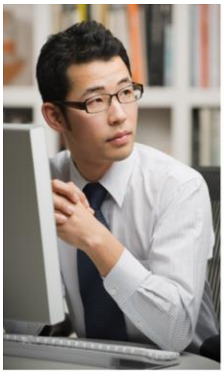
As a best practice, when creating permission groups use a prefix to help you to identify which group to use in your permission role. If you are creating a permission group that is receiving the permissions (a granted group), use the prefix **`Granted:`** for the name of the group. For example, if you are creating a permission group for IT managers, use the name **`Granted: IT Managers`**. Similarly, if you are creating a target permissions group, use the prefix **`Target`**. For example, if you want the IT managers to have access to all employees in the USA, you must create a target permission group based on location and use the name **`Target: Employees in USA`**.

Best Practice for Naming Permission Groups

Granted Group
- Start with prefix **Granted:**
- **Granted: IT Managers**

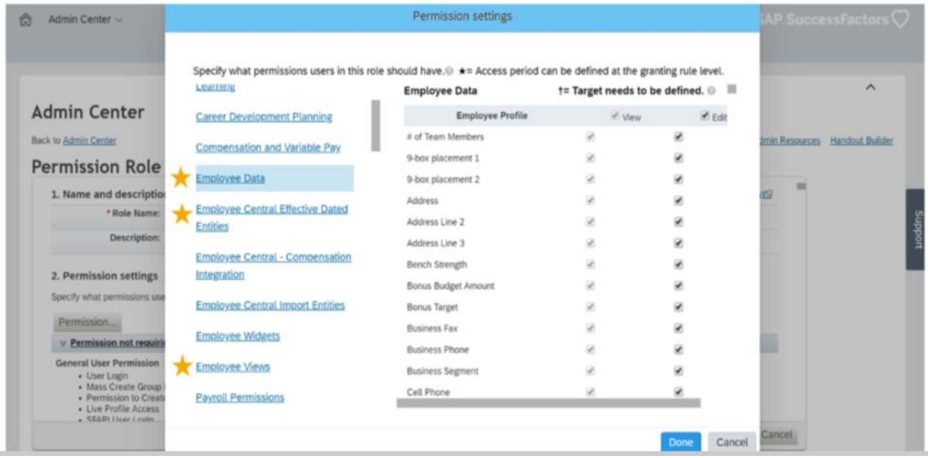
Target Group
- Start with prefix **Target:**
- **Target: Employees in USA**

Permission Roles

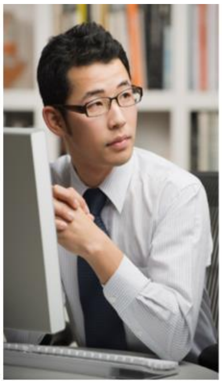


Permission Roles control the access rights in the system and involve the process of defining access to data and application functionality. To create and manage permission roles, choose *Manage Permission Roles*. After you add a name and description, choose *Permission* to go to *Permission Settings*, as shown in the figure, Permission Roles. You can see permission categories such as *Employee Data* and *Employee Central Effective Dated Entities*. When you select one of these categories, the permissions or fields for the category display on the right. Managers and employees in EC use the following permission categories: *Employee Data*, *Employee Central Effective Dated Entities*, and *Employee Views*. Some users also need access to *Reports Permissions*. If a customer chooses to use customizable fields in any of these categories, they must also receive permissions for the relevant roles.

Permission Roles



Additional RBP Resources



For more information on RBP, download the Role-Based Permissions Handbook and EC Implementation Handbook from the SAP Help Portal (http://help.sap.com/cloud4hr).

Administration Records Management

There are several ways to alter employee files in the People Profile layout. Please note, you will only see these options if they are permissioned to you in Role Based Permissions.

Clicking on the Pencil Icon allows you to insert a new dated entry into the Employee's file. If Event Reason Derivation is enabled, then they will be determined based on the change being made. Each new record added to the employee's file must be connected to a date in the past, present or future.

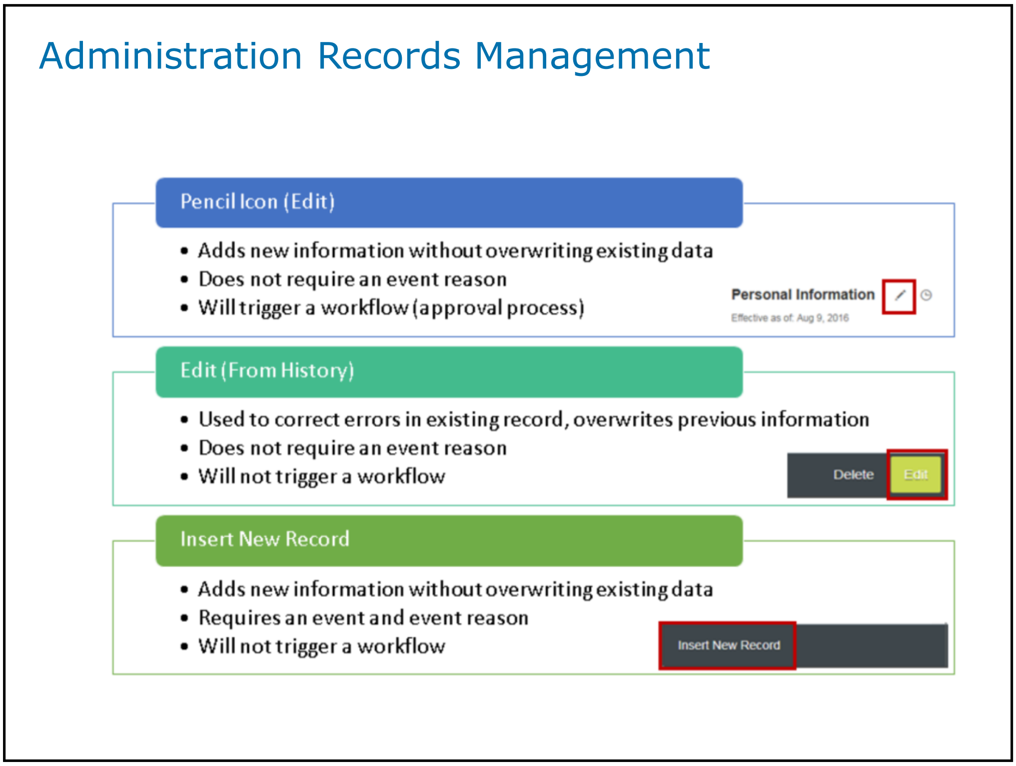
This action can trigger an approval process, which will need to be completed before the record is active in the system.

If you navigate to the history of a portlet and click on a dated record, you will see a variety of options. Edit enables an administrator or permissioned user to make changes to the historical record. For example, Marcus Hoff moved on January 5, 2010, but accidentally entered the incorrect ZIP code. To make changes to the historical record, choose *History → Edit*. This record will show corrected zip code only, however, you can still see the change was made in an audit report.

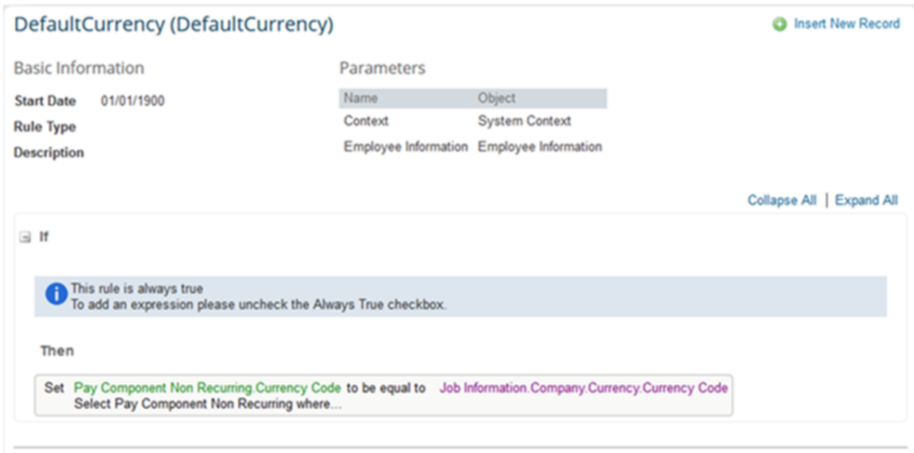
This change will not trigger an approval process.

Insert New Record is located under History (Clock Button) in the top-right corner. An event and event reason are required to insert a new record. Therefore, it is important for users with this privilege to be familiar with Events and Event Reasons in their system.

Navigating this way will not trigger an approval process. Approval processes are only triggered through the Pencil Icon or *Take Action --> Change Job and Compensation Information*.


Administration Records Management
Pencil Icon (Edit)
• Adds new information without overwriting existing data
• Does not require an event reason
• Will trigger a workflow (approval process)
Personal Information
Effective as of: Aug 9, 2016
Edit (From History)
• Used to correct errors in existing record, overwrites previous information
• Does not require an event reason
• Will not trigger a workflow
Delete
Edit
Insert New Record
• Adds new information without overwriting existing data
• Requires an event and event reason
• Will not trigger a workflow
Insert New Record

Configuring Propagation with Business Rules



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

IF...

the country is USA

AND the job classification is changed

THEN...

propagate the FLSA status to jobInfo

- Example 3: Propagate Standard Hour

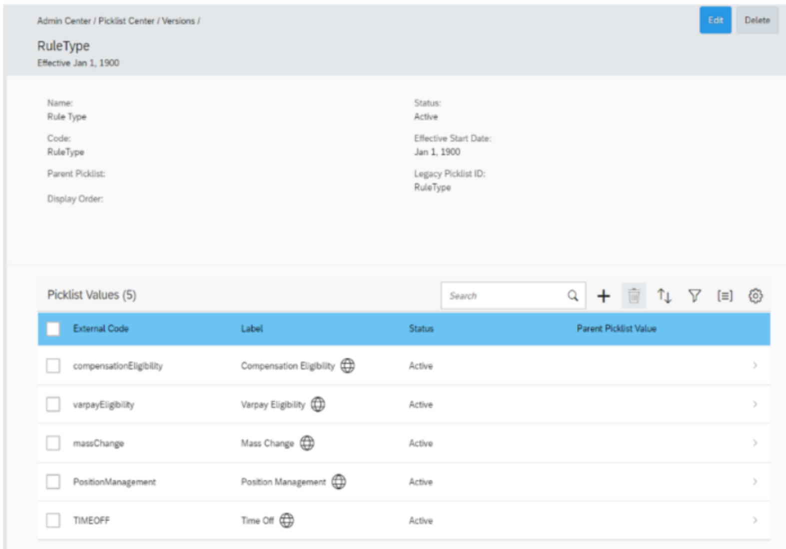
IF...

the legal entity is changed in Employment Info

THEN...

propagate the standard hour to Employment Info

Custom Rule for a Rule Type Picklist



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".
3. 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 Example

Foundation Object Propagation

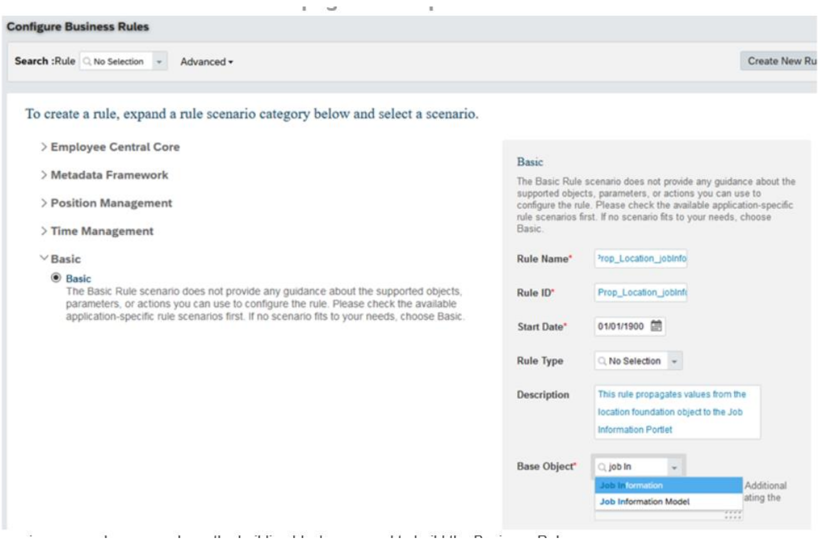
For the configuration of the business rule, we need to determine the appropriate fields required on the Foundation Object (source of the data value) and the Portlet (destination of the data value). In the example, we ant to copy the timezone value from the Location Foundation Object Records to the timezone 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 should review the Business Rules documentation and SAP Support site for more specific information.

Create a Business Rule from the Propagation Requirement



Create a Business Rule from the Propagation Requirement

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

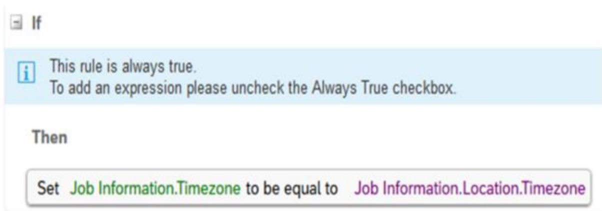
The first item will be to create the business rule and select the base object. The base object should be where the change is occurring. In our example, the base object with be Job Information.

There are possible objects 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 a changed value with the previous value. Each EC object is defined once as a base object, and then as a Model base object.

We will simply trigger the rule to run every time the location field changes, without regard for what the previous and current values are. Therefore we can use the Job Information base object. To create the Rule and select the base object:

1. 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. Optionally Select a Rule Type
7. Type in a detailed description
8. Select the appropriate Base Object

Configure the Logic for the Propogation Requirement

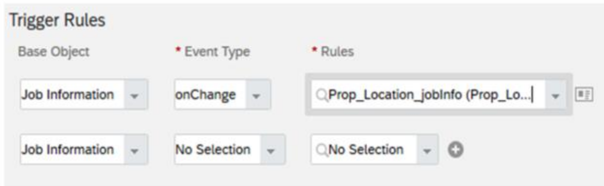


The IF statement contains the logic required to trigger the propagation. In this scenario, you are not concerned with the actual value. Therefore you will set the IF statement to always true. Setting the IF to always true implies the THEN statement will run any time the rule is triggered. We set the trigger event in the next section.

The THEN statement is where you set the value of the timezone field. You need to set the value to be equal to the value of the timezone for the selected location record.

Configure the Trigger for the Propogation Requirement

Configure the Trigger for the Propagation Requirement



In order for any Business Rule to trigger, it needs to be attached to the base object. Since the Job Information portlet is configured in the Succession Data Model, you can use either Manage Business Configuration or your XML editor to update the model.

To assign the Trigger in Manage Business Configuration:

1. Navigate to Manage Business Configuration
2. Select the appropriate portlet, usually the base object of the rule
3. Locate the field that when changes should initiate the propagation and click details.
4. In the Trigger Rules section, select the appropriate Base object
5. Set the event type to onChange
6. Select the rule you created for Rules.
7. Click Done.
8. Click Save.

Demo

Successfactor Logon