SuccessFactors Employee Central HRIS Sync_Home Page Config

1

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

 2

2

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*.

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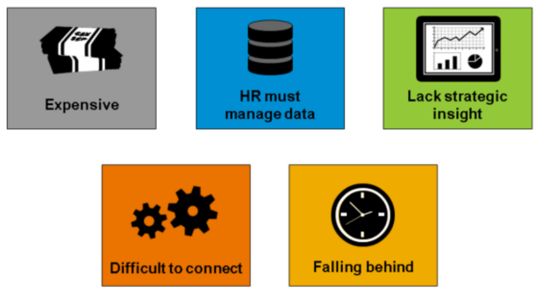
Traditional HR Solution



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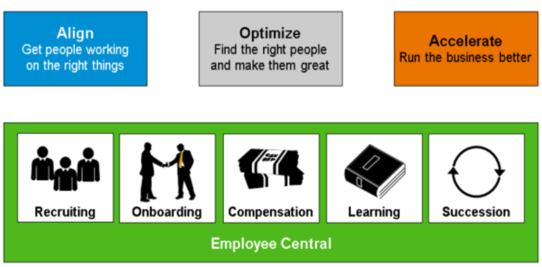
EC Functions and Features



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EC Functions and Features

EC Functions and Features

EC is an innovative cloud-based, software-as-a-service model, which addresses many of the problems of traditional HR solutions.

Low Cost
- SaaS delivery model ensures low total cost of ownership and delivers new capabilities four times per year

Strategic Insight
- Workforce analytics provide unmatched benchmark and metrics for better decision making
- Core Component in Business Execution Suite

Connection
- Cloud-based integration platform
  - Done through configuration, not development
  - Up and running in weeks, not months

Workforce Support
- Global system of record houses global workforce HR data and supports global HR processes
- Supports various workforce types like interns, contractors, and other contingent workforce.
- The Role-based permission model ensures granular access and control
- Mobile Client allows users to view employee info and approve transactions with mobile devices

Data Management
- Intuitive, easy-to-use Employee/Manager Self Service empowers employees and managers to own and enrich their data
- Consumer web experience
- Integrated social networking capability allows employees to collaborate
- Rule-based workflows support flexible approval processes

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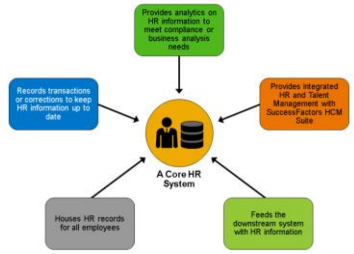
EC Functions

EC integrates following functions including the following:

- Houses HR records for all employees
- Records transactions or corrections to keep HR information up-to-date
- Provides analytics on HR information to meet compliance or business analysis
- Provides integrated HR and Talent Management with SAP SuccessFactors HCM Suite
- Feeds the downstream system with HR information



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Integration Capabilities

EC has two types of integration: Internal and External. Internal Integration is how EC integrates with other SAP SuccessFactors products through HRIS synchronization.

External Integration can be challenging. It can involve several consultants, complex and custom development, time, and patience. EC connects HR data to other systems. This type of integration is a cost-effective solution that is completed through configuration, not development, allowing implementation to occur in weeks rather than months.

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Integration

Internal Integration	External Integration
• How EC integrates with other SuccessFactors HCM Products • Completed through HRIS Sync	• EC connects HR data to other systems, including the following: Payroll, Financials, Travel, Benefits, and so on through a cloud-based platform. • Examples include the following: Application Programming Interface (API), Boomi, and SAP HANA Cloud Integration

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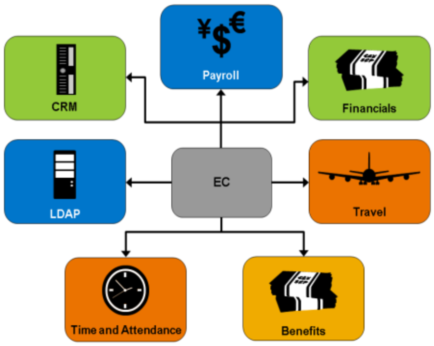
Integration Platform



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Succession Data Model-HRIS Element

There are two XML data models that define the configuration of Employee Data, the Succession Data Model and the CSF Succession Data Model. The Succession Data Model has several sections: Elements: Standard, Userinfo, Background, Tab, HRIS, HRIS Action, Element Permissions, DG Filters, View Template, and HRIS Sync Mappings. In this module, you learn how to configure HRIS elements only.

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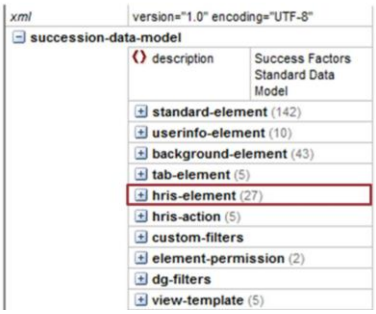
Succession Data Model



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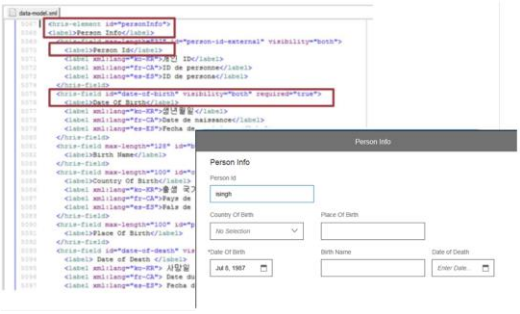
HRIS Elements in Succession Data Model



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HRIS Elements in Succession Data Model (Contd.)

The HRIS elements in the Succession Data Model allow you to customize the data file of an employee within EC. Earlier in the module, while looking at the employee imports, you learned about some of the standard objects and fields. By configuring the Succession Data Model, you can define what the fields are called in the UI and which ones are visible and required. If a customer requires custom fields, you can also control those fields.

The first screenshot in the figure, HRIS Elements in Succession Data Model, is from the Succession Data Model. The first HRIS element is `Person Info` or `Biographical Info`, depending on your instance. In this figure, you can see several of the *Biographical Info* fields: *Person ID*, *Date of Birth*, *Birth Name*, and so on. When you look at the UI, you can see how these fields are reflected.

The second screenshot in the figure, HRIS Elements in Succession Data Model, is from Irvi Singh's personal information page. The HRIS element *Person Info* label is shown at the top of the portlet and the *Person Id* is the first field. You can also see that the field *Date of Birth* has additional parameters. The field is set to required using the `required=` attribute, which generates the red star in the UI.

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Example of HRIS Elements in Succession Data Model

The label attribute sets what the user sees in the instance for that field. In the figure, Example of HRIS Elements in Succession Data Model, you can see a custom field within the `Personal Information` HRIS element. You can set the field to visible or required. You can also update the label. In this figure, you can see that *custom-string1* is updated to *Preferred Name*. Although this field does not require a picklist reference, it can be inserted just before the closing `</hris-field>` tag.

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Provisioning and Admin Center

Both Provisioning and Admin Center are necessary to configure and maintain EC. The figure, Provisioning and Admin Center, lists some of the key roles of each tool.

When working with EC, we recommend that you choose a different browser when using each tool. For example, you might use Google Chrome for Provisioning and Mozilla Firefox for the EC instance. Choosing different browsers enables you to work in both areas without logging out and on again.

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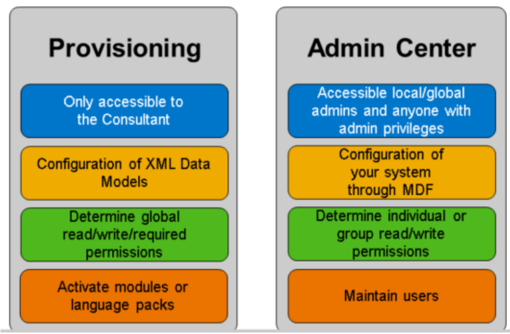
Provisioning and Admin Center



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Instance Preparation to Receive Notifications

To prepare your test instance, you need to update all employees email addresses so that you receive system notifications. In the figure, Test Instance Preparation, you can see the updated Email Information import file and the attached screenshot showing how to load the information.

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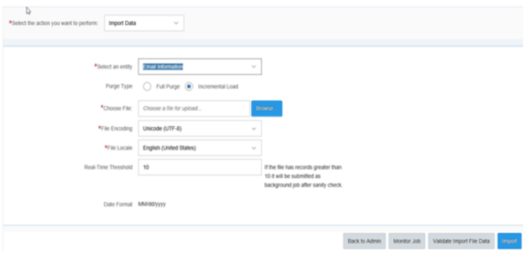
Test Instance Preparation



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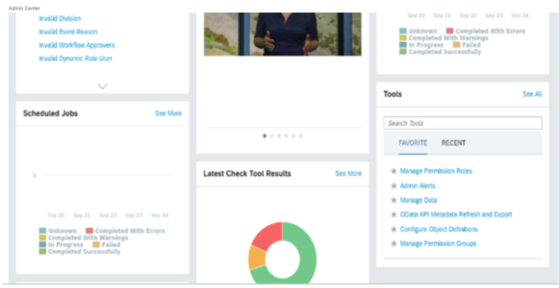
Admin Center



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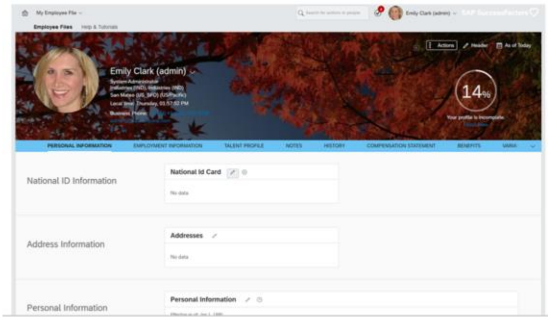
EC Environment



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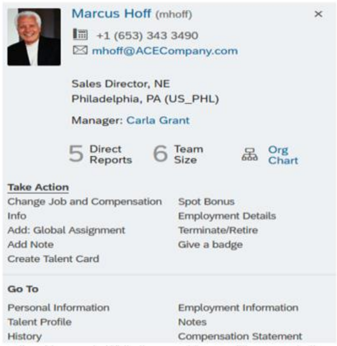
Quick Card



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Quick Card

The quick card is designed to provide an actionable search. While the searching conditions remain the same, the quick card provides details about the person selected as well as actions that you can initiate. It reduces the clicks required to submit a transaction and provides links to the talent products as well.

The quick card provides general information about the employee and includes links to the following options:

- *My Employee File*: Choose this link to view an employee file.
- *Email*: Choose this link to quickly send an email.
- *Manager Employee File*: Choose a manager name to view their employee file.
- *Org Chart*: Choose this link to view where the employee sits in the organization.
- *Take Action*: This link displays at the bottom of the quick card. If you click this link, the quick card expands to show additional options.
- *Take Action Section*: This section can display, depending on permissions, shortcuts to employee and manager self-service features. Examples include *Change Job and Compensation Info* and *Manage Global Assignment*.
- *Go To*: This section contains a list of quick links to different sections of the *Employee Files*. The list can also include links to talent management sections like the *Goal Plan* and *Development Plan*. Your organization's system may vary from this example because of configuration.

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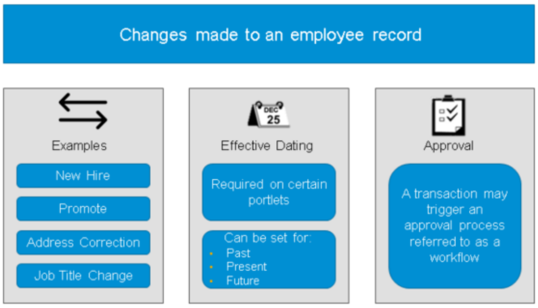
Transaction Fundamentals



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Administrative or HR Edits

Many of the records in EC are effective-dated. Each time you insert a new record for one of these items, the system prompts you to provide the effective start date. It is important to understand and to maintain accurately effective dates because they enable you to create historical, present, and future records. For example, if Marcus is moving in January, you can add his new address with an effective date in the future. However, Marcus will not see that change in effect until January.

In the application, the fields start-date and end-date are used for effective dating. The start-date is usually displayed in the UI. The field end-date does NOT typically appear in the UI.

When you create the first record for an entity, the start date is supplied by the user creating the record and the end date will be set to December 31, 9999.

When you add a new record for an effective dated portlet, the system does not change the stored data. Instead, it creates a new row of data to track the new values from the effective start date of the change and continues to store the values that were effective before the change. The end date of the previous record is updated to 1 day before the new record's start date.

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Forward Propagation

Start Date	Field A	Field B
Jan 1	10	10
Dec 1	10	20

Insert Record July 1, 15, 15

Start Date	Field A	Field B
Jan 1	10	10
July 1	15	15
Dec 1	15	20

You may need to insert data that is between 2 records of an effective dated portlet. In this case, it is important to understand the concept of forward propagation.

Forward propagation means that a change in the value of a field in an entity is also made (propagated) to future records for the same entity. The forward propagation of this field change stops as soon as one of the future records has a field value maintained that is different than the original field value

For example, imagine the initial record has a start date of Jan 1 and the values of Fields A and B are set to 10. A second record has already been entered into the system with a start date of Dec 1. The value of field B was changed to 20. In this example the value of field A has not changed.

You want to go back to insert a change that occurred on July 1, where the values of field A and field B were both 15. IF forward propagation is enforced, the value of Field A will be updated on the Dec 1 record, while the value of Field B on the Dec 1 record will remain unchanged. This is because forward propagation continues until the field value of the record is different then the original. In this case Field B had a different value than the original record (Jan 1).

Forward propagation in only supported on certain objects:

• MDF Objects

• Job Information

• Job Relationships

• Compensation Information

Also forward propagation only occurs under certain methods of making the changes, for example importing a change versus changing directly in the employee file portlet.

For full details on Forward Propagation support, please review the Employee Central Master Implementation Guide.

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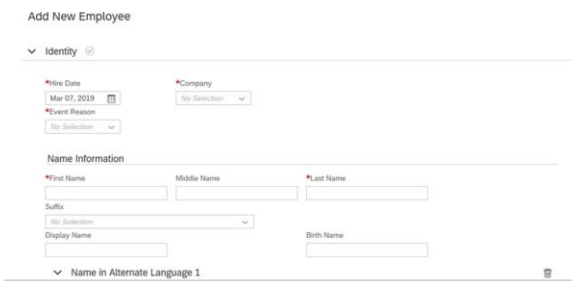
Special Transactions



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Rehire Check

After entering the new hire's identity information and clicking on Next, or Continue, Employee Central checks the system's current or inactive employee records to see if there is a match. If a match exists, you can select the existing record and update it as necessary or ignore the match. You can use a combination of First Name, Last Name, Date of Birth and National ID to match records.

If you choose **Accept Match**, all previous information stored for the employee at the date of termination is copied into the **Add New Employee** screens.

If you choose **Rehire with new employment**, all the data from the previous employment cannot be seen in the system and you complete information for the new employment in the Add New Employee screens.

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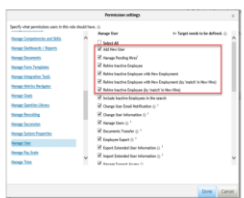
RBP for Adding New Employee Screen



Here are the available Role Based Permission options around the Add New Employee screen. You can control who can hire employees, who can rehire inactive employees, and who sees the option to match or rehire as a new employee.

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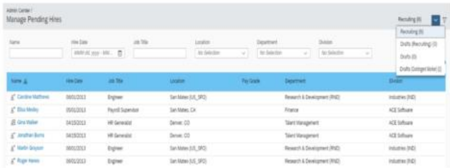
Manage Pending Hires



The Manage Pending Hires screen acts as a bridge between the Recruitment module and Employee Central. Anyone that came through the recruitment process and is ready to be hired will be found here. Also, if the hiring process is saved and interrupted, you can use the drafts section on this screen to come back to the draft of the new hire at any time.

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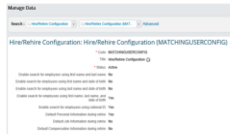
New Hire Additional Configuration



There are a variety of additional optional configurations available for new hires and rehires. This is not a complete list, and each would require some configuration. You can locate the feature and how to configure it via the SAP Help Portal.

Some of the optional configuration include:

- Enabled / Disable search for employee match options: Configure support for search fields of employees, such as Names, Date of Birth, or National ID to match an inactive employee
- Enable Default Information for Rehires: Include or exclude Personal, Job and Compensation Information data from a previous employment
- Select Rule to Generate employee ID: Create user IDs using business rules, for example, if you want specific ranges for specific regions or countries
- Allowing Rehires to Keep Existing Logon: Allow existing employees rehired in the company to keep their existing logon to avoid confusion and disruption
- Prohibiting Change of Legal Entity in Any Employment: Set the system up so that it doesn't tolerate a change of legal entity within one employment. For an active employee, you must first terminate the employee in the system from the old legal entity and then rehire them with new employment on the new legal entity.
- New Hires with Fixed Term Contracts: Enter the hire information and future termination in a single tool New Hire for Fixed Term.
- Accessing Future Transfers and Hires: Configure managers and admins to see a pending transfer or hire prior to the transfer date to add employee data and complete the hire process.

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Terminations

You terminate an employment in Employee Central when an employee leaves the company. You will need to include a termination date and termination reason. Additional fields are available on the termination screen that do not normally appear in the Employment Information portlet. If the employee is a manager with direct reports, then the Transfer Direct Reports section will appear on the screen. You can select from the list about who the direct reports will then report to.

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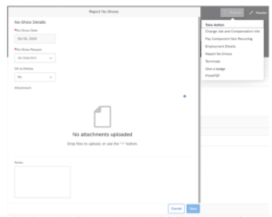
Report No-Shows



When an employee who has been recently hired to a company does not show up for their first day of work to start their new employment, they must be removed from the active users in the system. Instead of terminating the new employee, which could cause issues with payroll, you can report the employee as a "No-Show" in the system to set their status to "inactive". When you select the action to "Report No-Show", a transaction will pop up to fill in details such as No-Show Date, Reason, and if it is Ok to Rehire this employee. When saving the action, a new Job Information record is created which begins on the exact date of hire, which makes sure that the newly hired has not a single active day in the system. This action relieves having to terminate the employee and having any active work dates. If the no-show is a manager, and already has direct reports assigned, the admin can reassign those employees in the same way as in the Terminations page. The Report No-Shows action will only be available for a period of 30 days after the hire date of the employee.

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People Profile

With the People Profile, you can view the entire profile and take immediate action on one simple, unified page. People Profile comes with a drag-and-drop configuration tool to set up the employee profile for your company. You can select which data fields to display in the profile page header and control visibility of all employee data with role-based permissions.

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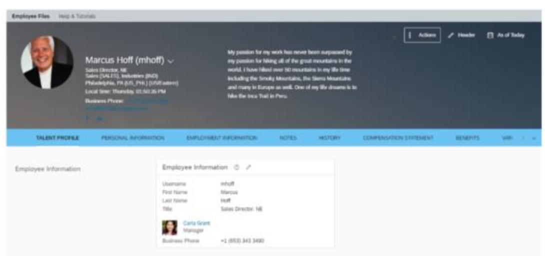
People Profile



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People Profile-Employee Central Functionality

With People Profile, you can access Employee Central functionality, such as employee self-service (ESS), manager self-service (MSS), and spot bonus. You can add and edit an employee's personal, employment, and compensation information, or view the effective-dated change history.

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Employee Central Information in People Profile

Information on the People Profile is grouped together in "blocks" that can be added to any section or subsection of the profile.

In most cases, information blocks on the People Profile correspond to "portlets" used in previous versions and display exactly the same data.

In some cases, information blocks do not correspond to portlets, but to entirely separate pages, or "employee views," used in earlier versions. For example, *Employee Profile* information such as notes, performance history, or compensation statements were previously displayed as separate pages, but on the People Profile, they are all displayed as blocks. Likewise, some Employee Central features, such as Time Off and Payroll, were previously displayed as separate pages and are now displayed as blocks.

Employee Central defines data from the data models to be displayed in portlets as well. Most HRIS elements in the succession data model were defined to display as a portlet, with a few exceptions. When you enable EC with People Profile, People Profile will be configured with 2 section for the EC Core Data (Person and Employment Objects). Those by default are labeled Personal Information and Employment Information. Each section in PP will have several subsections. Each subsection may have 1 or 2 PP blocks that represent a portlet for EC.

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Configure People Profile

You can manage the content and layout of People Profile using a Configure People Profile tool.

The *Configure People Profile* admin tool supports all of the functionality available in the previous profile configuration tool, but with a much improved user experience. You can now use an easy, drag-and-drop interface to add sections, subsections, and information blocks to the profile.

You can also use it to configure other "general settings" that were available in the previous admin tool, such as the ability to add introductory text or video, manage background images, add profile completion reminders, and configure ratings data settings.

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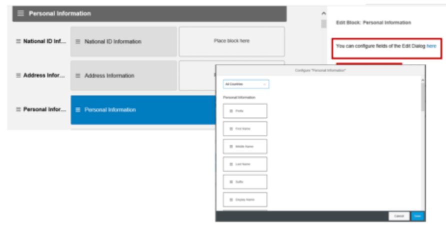
People Profile Field Configuration



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People Profile Field Configuration

Within the Configure People Profile tool, you now have the ability to rearrange fields within certain sections, like Personal Information and Job Information, when viewing the edit screen. You can also choose a country to then re-arrange country-specific fields within that portlet.

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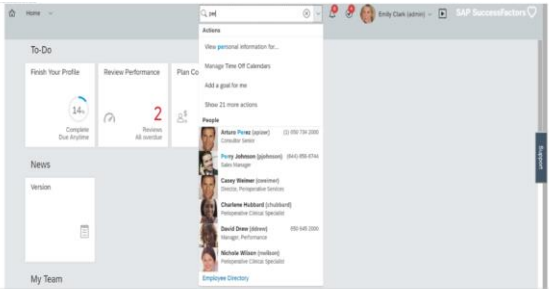
Action Search



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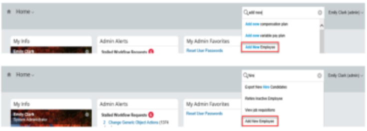
Search Terminology



Search terms do not need to exactly match the labels displayed in the user interface. You can natural language to describe actions in your own words. For example, to add a new user to the system, you might type "add employee" or "add user" or "hire". All of these search terms return the action Add new employee.

Similarly, in order to request a day off, you might type "take day off" or "request leave" or "PTO". Any of these terms will return the Request time off action and navigate you to the appropriate page

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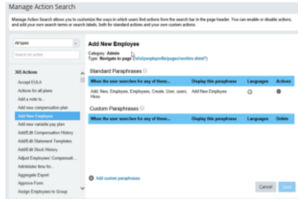
Manage Action Search



No configuration steps are required after action search is enabled. You can immediately start using it to find and complete a large number of actions that are available by default.

However, as an administrator, you can also use the new Manage Action Search admin tool to modify the default search behavior. This allows you to optimize action search results for people in your company and facilitate access to additional frequently-used actions.

You can also add custom actions to your instance. You can create custom navigation actions using the Configure Custom Navigation tool. Also, when you create new reports or dashboards, they are automatically made available in action search as well.

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Check Tool

Check Tool

The Check Tool can be used to identify data and configuration issues.

Sometimes, you might find that your system doesn't work as you expect. There can be different reasons for this, such as:

- Some data is inconsistent
- The system is not configured correctly

With the check tool, you can identify what's wrong, rather than simply creating a ticket. The check tool:

- Finds out what is wrong and how bad the problem is
- Suggests a solution

To use the check tool:

1. Choose the application, such as Position Management, where you want to carry out checks.
2. Click the object you're interested in to list the checks you can run for it.
3. You can run as many checks as you want. Note the 'Run Checks' button at bottom right, which tells you how many you have selected.
4. The result can be any of these:

- Success: No issues found.
- Warning: One or more issues found, but they are not too serious.
- Error: One or more serious issues found. Action is required.

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Enabling the Check Tool

Enabling the Check Tool

To Activate the Check Tool, go to *Manage Permission Roles* and that will open up the Permission Role List

Select the permission role you want to change. This will open up the Permission Role Detail page

Select Permission button. This will open up the Permission settings box

Go to *Administrator Permissions > Check Tool* and select *All* and click *Done*

Select *Save Changes* to Finish

More information

Employee Central Feature Settings

Customers can now enable/disable certain Employee Central features that previously could only be turned on through Provisioning. This includes the following features we discuss throughout this course:

- Position Management
- Company Structure Overview
- Contingent Workers
- Global Assignment
- Concurrent Employment

Enabling Employee Central Feature Settings

To Activate Employee Central Feature Settings:

1. Go to *Manage Permission Roles* that will open up the Permission Role List.
2. Select the permission role you want to change. This will open up the Permission Role Detail page.
3. Select *Permission* button. This will open up the Permission settings box.
4. Go to *Administrator Permissions > Manage System Properties.*
5. Select *Employee Central Feature Settings* and select *Done.*
6. Select *Save Changes* to finish.

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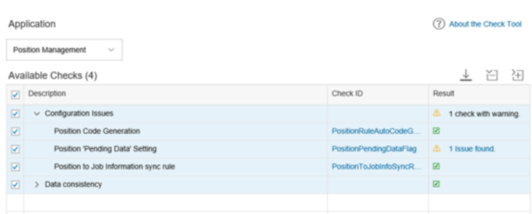
Check Tool



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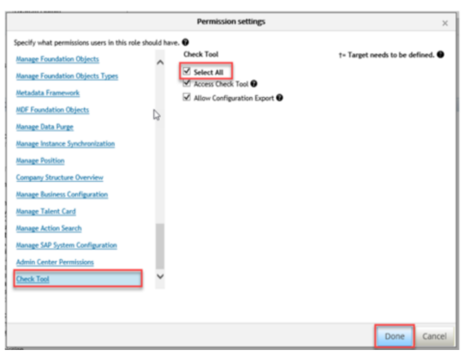
Enabling the Check Tool



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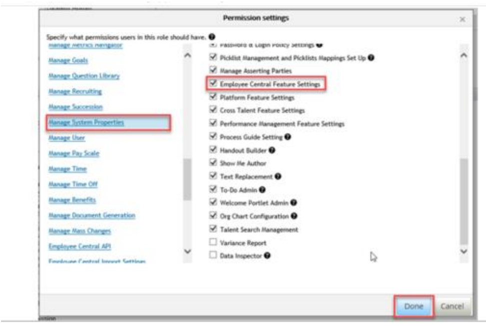
Enabling Employee Central Feature Settings



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Demo

Successfactor Logon

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