



SuccessConnect

INTERNAL – SAP AND CUSTOMERS ONLY

HOL105 – Business Rules

Write Business Rules to Automate Processes in the
SAP SuccessFactors Employee Central Solution

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In this hands-on lab, learn how to more easily create powerful business rules using scenarios to drive changes in the SAP SuccessFactors Employee Central solution.

LAB ACTIVITY #1 – Review and assign Business Rule to generate an EC Alert for Work Permit Expiration

In this activity, you will assign an existing business rule to generate EC Alerts when employee's Work Permit is expiring in 90 days (3 months) or less and notify employees to update their information.

NOTE: The business rule includes a reference to an Alert Message and Workflow Information. While you will see in a later activity how this works, these records are configured in the following way:

ALERT MESSAGE (created in *Manage Data*)

Alert Message: WVEXP (WVEXP)

Take Action ▾

Name

External Code * WVEXP

Effective Status * Active

Alert Header [[SUBJECT_USER]] - Your work visa is about to expire soon

Alert Description [[SUBJECT_USER]] - Your records as of [[EFFECTIVE_DATE]] indicate that your Work Visa is going to expire soon. Please select [[VIEW_BLOCK_ON_PROFILE]] to renew your details.

Localized Header * [[SUBJECT_USER]] - Your work visa is about to expire soon ? ?

Localized Description * [[SUBJECT_USER]] - Your records as of [[EFFECTIVE_DATE]] indicate that your Work Visa is going to expire soon. Please select [[VIEW_BLOCK_ON_PROFILE]] to renew your details. ?

WORKFLOW (created in Manage Org, Pay and Job Structures)

Workflow: WorkPermitAlertWFL (WorkPermitAlertWFL)

Workflow ID WorkPermitAlertWFL

Name WorkPermitAlertWFL ?

Description

Remind In Days

Is Delegate Supported No

Alternate Workflow

Redirect CC Users To Workflow Approval Page No

Step 1

Approver Type	Approver Role ?	Context ?	Edit Transaction ?	No Approver Behavior	Relationship to Approver ?
Role	Self	Source	No Edit	Skip this Step	Employee

Contributors

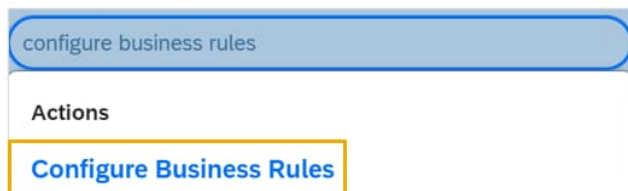
No data for Contributors available or you do not have the necessary permission.


Cc Role

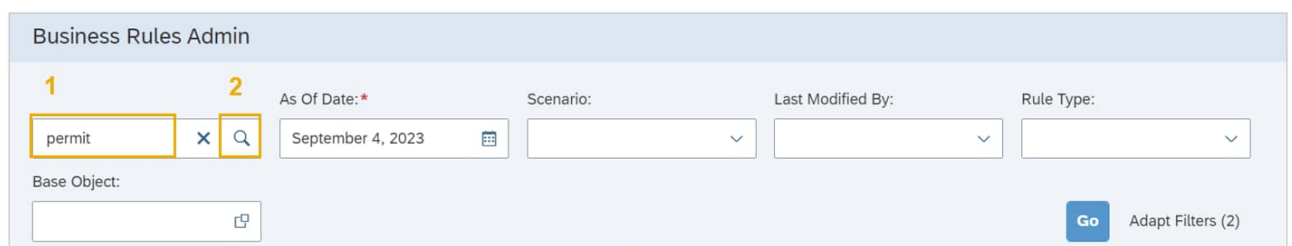
CC Role Type	CC Role ?	Relationship to Approver ?	Context ?	Respect Permission	Email Template Group ?
Role	Manager	Employee	Source	No	No Selection

LAB ACTIVITY #1 (START FROM HERE)


1. Navigate to *Configure Business Rules* using Action Search.



2. In the Search box, type **permit** and select the  to start searching. You can also select the blue button **Go** to search.



3. Locate the **WorkPermitAlert** business rule in the results. Notice the rule is not assigned yet.

<input type="checkbox"/>	WorkPermitAlert	WorkPermitAlert	Trigger Rules to Generate Employee Central Alerts (coreEC_alertRuleScenario)	workPermitInfo	Emily Clark (admin)	 The rule is not assigned
--------------------------	-----------------	-----------------	--	----------------	---------------------	---

4. Do NOT assign the rule yet, and just click on the central area to open the business rule and check the IF/THEN rule logic.
 - The conditions (IF) to be met are the following:
 - ✓ The expiration date of the Work Permit (Personal Documents Information) should not be empty and should occur anytime between today's date and 3 months after.
 - The statements (THEN) to be met are the following:
 - ✓ An Alert Message (WVEXP) will be displayed to inform alert recipient(s) about the Work Permit expiring soon.
 - ✓ The Approvers/CC Roles included in the Workflow (WorkPermitAlertWFL) will receive the alert.
 - ✓ The date when the alert will be generated with an effective date of 3 months or less before the expiration date of the Work Permit (Personal Documents Information).

If

and

Personal Documents Information.Expiration Date is not equal to Null

Personal Documents Information.Expiration Date is on or before Date Plus()

Base Date: Today()
(Optional) Number of Months: 3
(Optional) Number of Days: Null

Then


Set Alert.Alert Message to be equal to WVEXP (WVEXP)

Set Alert.Workflow Information to be equal to WorkPermitAlertWFL (WorkPermitAlertWFL)

Set Alert.Effective Date to be equal to Date Plus()

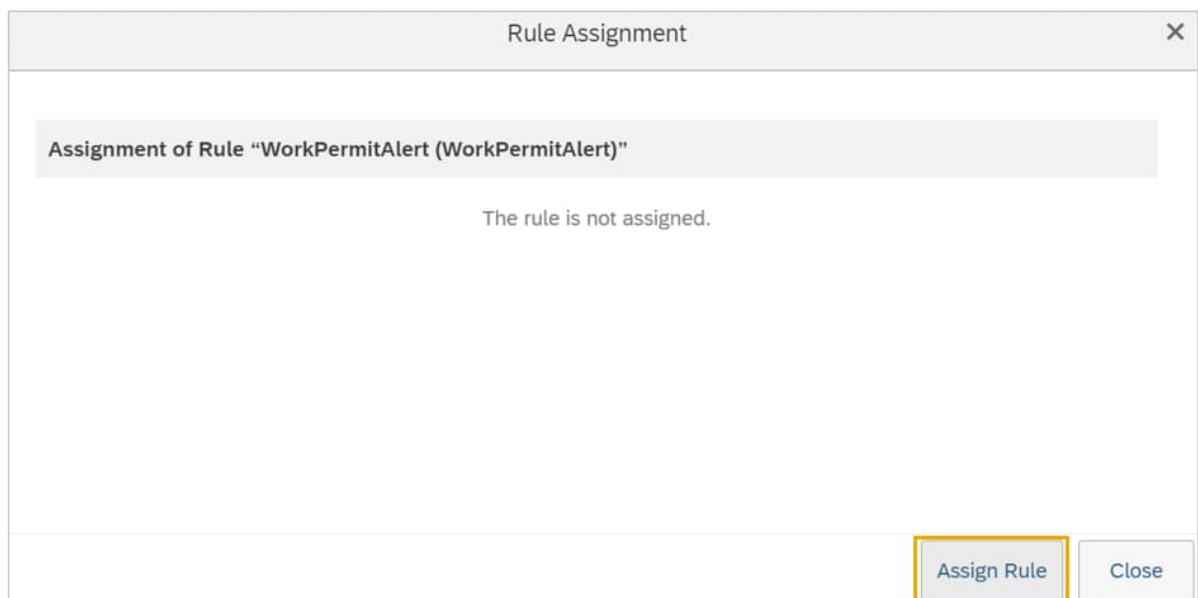
Base Date: Personal Documents Information.Expiration Date
(Optional) Number of Months: -3
(Optional) Number of Days: Null

5. Start with the rule assignment. Scroll up and select the dot icon.

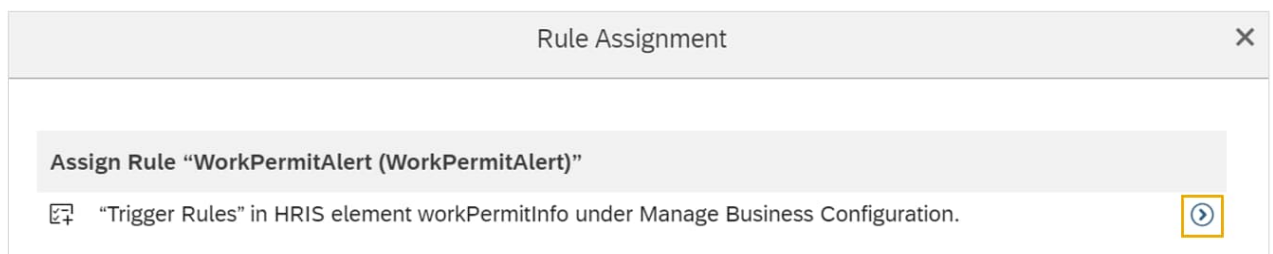
 **WorkPermitAlert (WorkPermitAlert)**

Scenario: Trigger Rules to Generate Employee Central Alerts [Change Scenario](#)

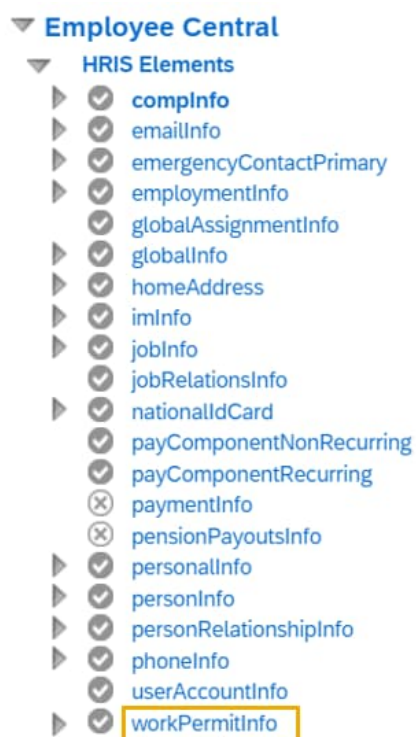
6. In the next step, select **Assign Rule**



7. Select the arrow on the next step. A new tab will be opened with the Manage Business Configuration tool.



8. In this step, locate **workPermitInfo** under Employee Central > HRIS Elements and select it.



9. Select Take Action > Make Correction

Employee Central HRIS Elements workPermitInfo

Identifier * workPermitInfo ?

Label Work Permit Info ? ?

Default Label Work Permit Info ?

Enabled Yes ?

HRIS Fields

Identifier	Label	Enabled	Mandatory	(19) More
country	Country ?	Yes	No	Details
document-type	Document Type ?	Yes	No	Details
document-title	Document Title ?	Yes	No	Details
document-number	Document Number ?	Yes	No	Details
issue-date	Issue Date ?	Yes	Yes	Details
issue-place	Issue Place ?	Yes	No	Details
issuing-authority	Issuing Authority ?	Yes	No	Details

Take Action ▾

Make Correction

10. Scroll down to the *Trigger Rules* section. You will see in the first dropdown for the Base Object the Work Permit Info as default and the fourth drop down Enabled=Yes. Leave them as-is, and select the following options for the 2nd and 3rd dropdown options:

- Event Type = **saveAlert**
- Rules = **WorkPermitAlert (WorkPermitAlert)**

Trigger Rules

Base Object

Work Permit Info ▾

Event Type *

saveAlert ▾

Rules *

WorkPermitAlert (WorkPermitAlert) ▾

Enabled

Yes ▾

(1) More

[Details](#)

11. Scroll down and select Save to save your changes.

12. Close the tab and return to the Business Rules Admin.

13. Close the Rule Assignment popup dialog. You can select the *Close* button or the **X** at the top right corner.

Rule Assignment

Assign Rule "WorkPermitAlert (WorkPermitAlert)"

"Trigger Rules" in HRIS element workPermitInfo under Manage Business Configuration. [?](#)

Close

14. Verify that the rule is now assigned.

✓ WorkPermitAlert (WorkPermitAlert)

Scenario: Trigger Rules to Generate Employee Central Alerts [Change Scenario](#)



In this activity, you have successfully reviewed and assigned an existing Business Rule for the Trigger Rules to Generate Employee Central Alerts scenario, to send an alert when the Work Permit Expiration Date is within a month.

LAB ACTIVITY #2 – Verify Work Permit information and Run a Scheduled Job to trigger EC Alerts and Notifications

In this activity, you will verify the Work Permit information for an employee should trigger an alert to inform about the expiration date.

To ensure an alert is triggered, you will run an existing scheduled job from **Scheduled Job Manager** to trigger EC Alerts and Notifications and send alerts to the employees based on the business rule assigned in the previous activity.

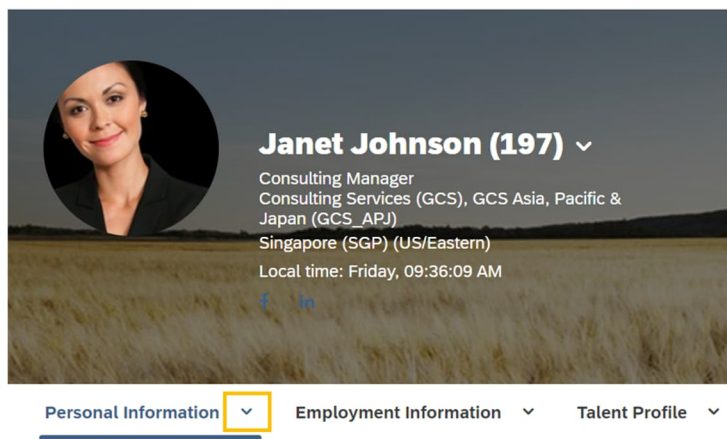
1. In the action search, type *janet* and select the employee **Janet Johnson** from the results.



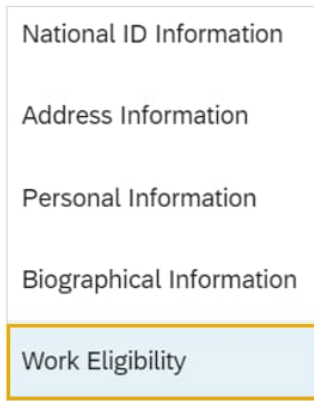
2. You will now navigate to My Employee File. Locate the **Personal Information** section and select



to see the subsections.

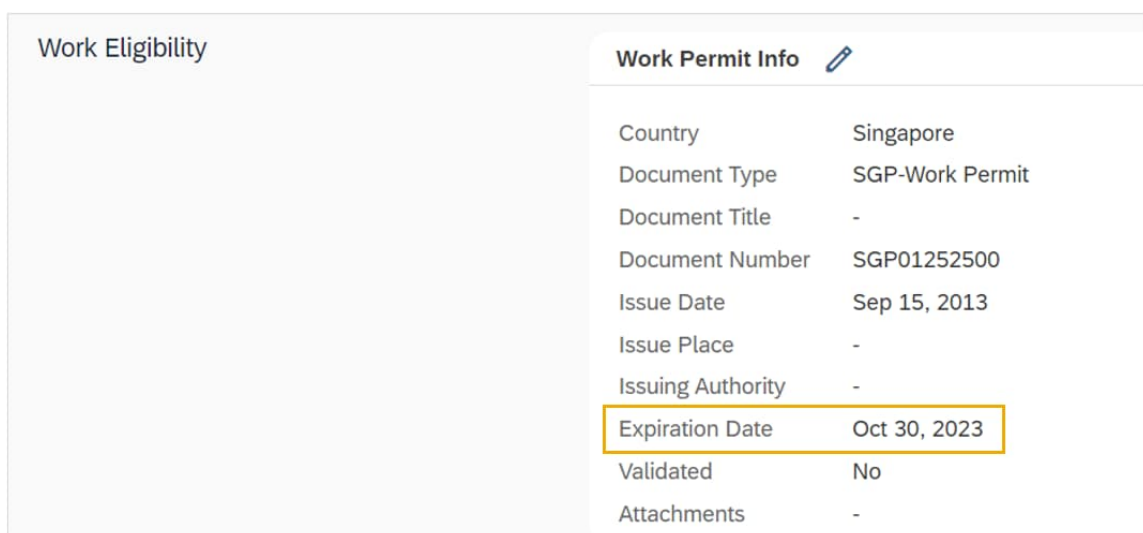


3. Select **Work Eligibility**




A vertical sidebar menu with five items: 'National ID Information', 'Address Information', 'Personal Information', 'Biographical Information', and 'Work Eligibility'. The 'Work Eligibility' item is highlighted with a yellow border.

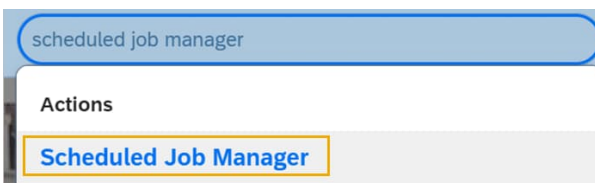
4. Verify that the Expiration Date of the Work Permit expires within the next 3 months, which meets the criteria set in the Business Rule to trigger an alert.



The 'Work Eligibility' section is displayed, showing a table of 'Work Permit Info'. The 'Expiration Date' is highlighted with a yellow border.

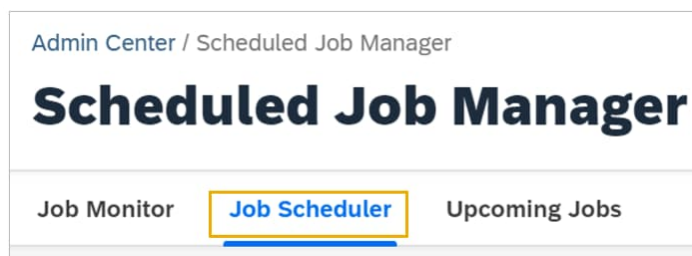
Work Permit Info 	
Country	Singapore
Document Type	SGP-Work Permit
Document Title	-
Document Number	SGP01252500
Issue Date	Sep 15, 2013
Issue Place	-
Issuing Authority	-
Expiration Date	Oct 30, 2023
Validated	No
Attachments	-

5. In the next steps, you will run the job to trigger the EC Alerts.
Navigate to *Scheduled Job Manager* using Action Search



A search bar contains the text 'scheduled job manager'. Below it, under the 'Actions' section, the 'Scheduled Job Manager' link is highlighted with a yellow border.

6. Select the *Job Scheduler* tab.



The 'Scheduled Job Manager' page is shown. The 'Job Scheduler' tab is highlighted with a yellow border.

Admin Center / Scheduled Job Manager

Scheduled Job Manager

Job Monitor **Job Scheduler** Upcoming Jobs

7. In the Job Name, type *alert* and select **Go**, the blue button located on the right, to search for this job.

Scheduled Job Manager

Job Monitor Job Scheduler Upcoming Jobs

Job Request ID: Job Name: Job Type: Status: Creation Date:

[+ Create Job Request](#)

8. In the results, you will see an EC Alerts Job (One Time) with a Submitted status. In the Actions column, located on the right, select the Actions dropdown and choose **Run It Now**

Job Request ID	Job Name	Job Type	Recurring	Dependent Of	Status	Creation Time (Local Time)	Actions
101470	EC Alerts Job (One Time)	EC Alerts and Notifications			Submitted	Jun 29, 2023, 4:17:48 PM (+02:00)	<div> Actions Cancel Run It Now </div>

9. In the confirmation dialog, choose **OK**. A toast message “A Run It Now job has been created” will be displayed.

i
Information

Do you want to run job request EC Alerts Job (One Time) (101470) now?

OK

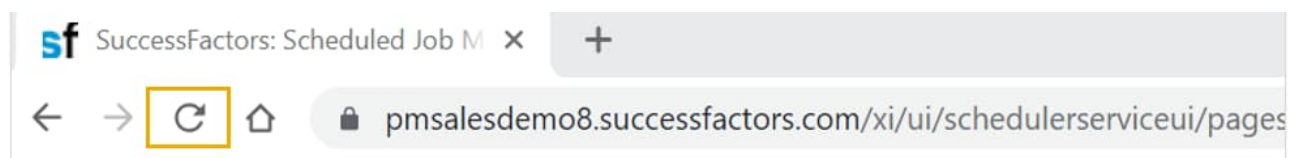
Close

10. Select the **Job Monitor** tab to verify that the job was completed.

Scheduled Job Manager

Job Monitor Job Scheduler Upcoming Jobs

11. Since the job was just run, it may take a few moments to be completed. If you cannot see the results, refresh the page in your browser to update the Job Monitor information. You will find the option at the top toolbar.



12. Verify the job results are successful and the status is **Completed**.

Job ID	Job Request ...	Job Name	Job Type	Status	Start Time (Local Time)	Actions
829	101533	EC Alerts Job (One Time)	EC Alerts and Notifications	Completed	Jun 30, 2023, 11:05:17 AM (+02:00)	View Details

13. You can also optionally select **View Details** to see more information. The log should display the processing of the EC Alert

Status	Start Time (Local Time)	Progress	Actions
Completed	Sep 4, 2023, 10:55:09 AM (+02:00)		View Details

EC Alerts Job (One Time)

EC Alerts and Notifications

Description	Time	Status
Job successfully completed.	Sep 4, 2023, 10:55:11 AM (+02:00)	Completed
ecAlertsAndNotifications job just finish execution:	Sep 4, 2023, 10:55:11 AM (+02:00)	In Progress
Total time EC Alert and Notification took to finish = 00 min(s) 01 second(s)	Sep 4, 2023, 10:55:11 AM (+02:00)	In Progress
Processing of EC Alerts finished for WORK_PERMIT_INFO = 1 EC alerts triggered, 1 To-Dos created, 1 emails sent, No error messages. Total time took EC Alerts to process 00 min(s) 00 second(s)	Sep 4, 2023, 10:55:11 AM (+02:00)	In Progress
Processing of EC Alerts started for WORK_PERMIT_INFO = 1 alerts checked	Sep 4, 2023, 10:55:10 AM (+02:00)	In Progress
Creation of EC Alert for PAY_COMPONENT_NON_RECURRING completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	Sep 4, 2023, 10:55:10 AM (+02:00)	In Progress

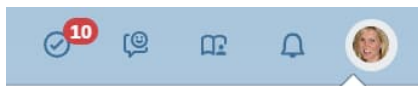


In this activity, you have successfully verified the Work Permit information for an employee and run an existing Scheduled Job to generate the EC Alerts and Notifications based on the Business Rule for the Trigger Rules to Generate Employee Central Alerts scenario that was created previously.

LAB ACTIVITY #3 – Verify the Employee receives an EC Alert for Work Permit Expiration on the Home Page.

In this activity, you will proxy as one of the employees whose Work Permit is expiring within the next month and confirm the alert displays in the For You Today section as an engagement card. In the alert details, the `[[VIEW_BLOCK_ON_PROFILE]]` token should allow the employee to navigate to the Work Permit block and edit the renewal details.

1. In the name menu, choose **Proxy Now** to proxy as Janet Johnson, the employee in the organization whose Work Permit is set to expire soon.



Emily Clark (admin)

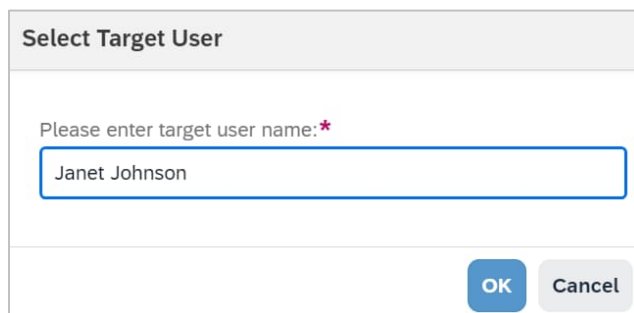
 Proxy Now

 Settings

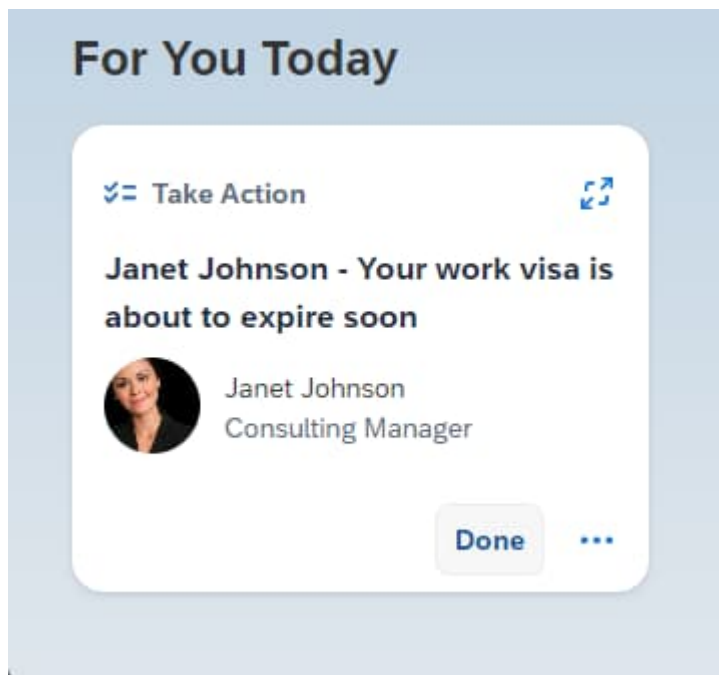
2. Type **janet** and select *Janet Johnson, Consulting Manager* from the results.



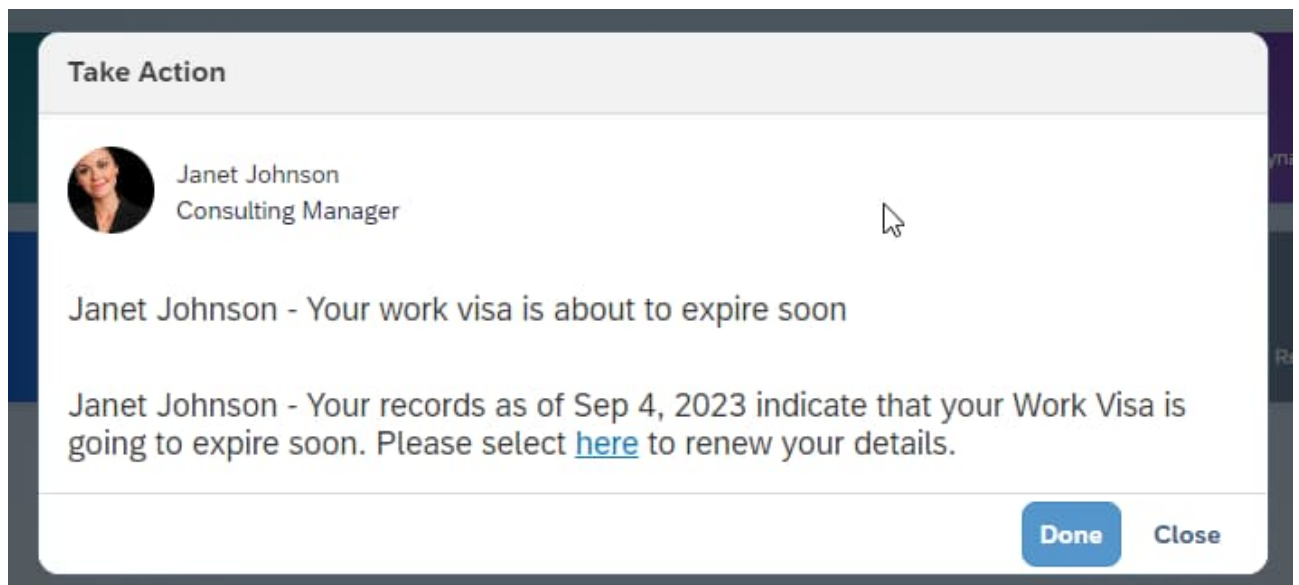
3. Select **OK**.




4. In the Home Page, scroll down to the **For You Today** section and verify there is an engagement card to take action.



5. Click on the engagement card to drill down into its details. Select the `[[VIEW_BLOCK_ON_PROFILE]]` link, indicated as **here**.




6. The link should navigate directly to the **Work Permit Info** block. As an employee, you have edit permissions, therefore the block is editable, and you can select the pencil icon.

Work Permit Info 	
Country	Singapore
Document Type	SGP-Work Permit
Document Title	-
Document Number	SGP01252500
Issue Date	Sep 15, 2013
Issue Place	-
Issuing Authority	-
Expiration Date	Oct 30, 2023
Validated	No
Attachments	-

- Change the Expiration Date to *Dec 31, 2028*. In the *Expiration Date* field, you can clear the existing details (select with your mouse and clear it), type **12312028** and click away. Or alternatively, use the calendar to select the date.

Expiration Date



Expiration Date

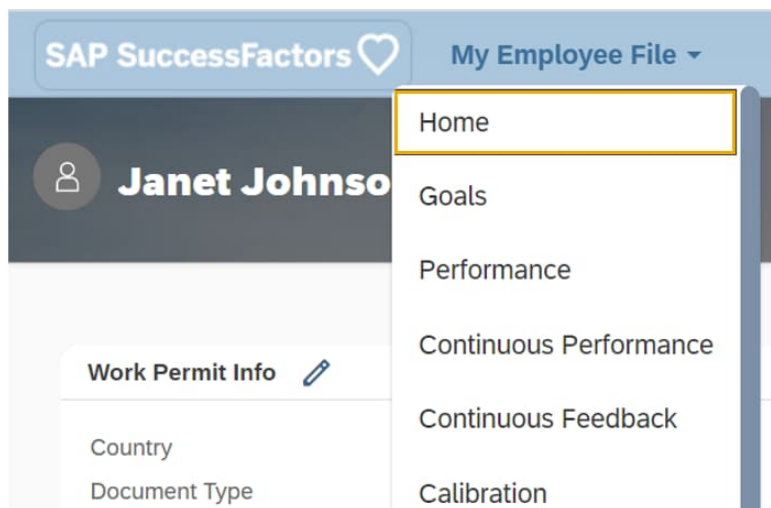




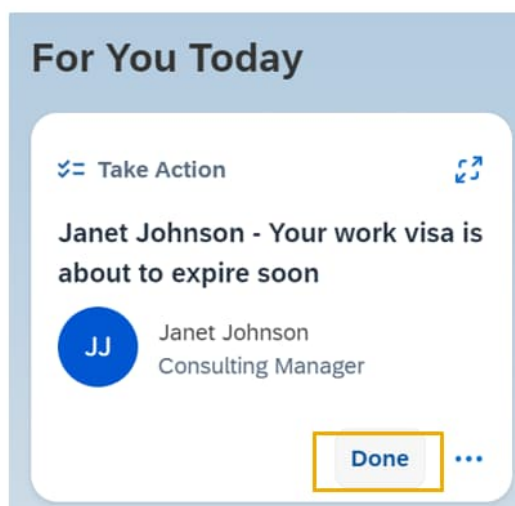
Expiration Date



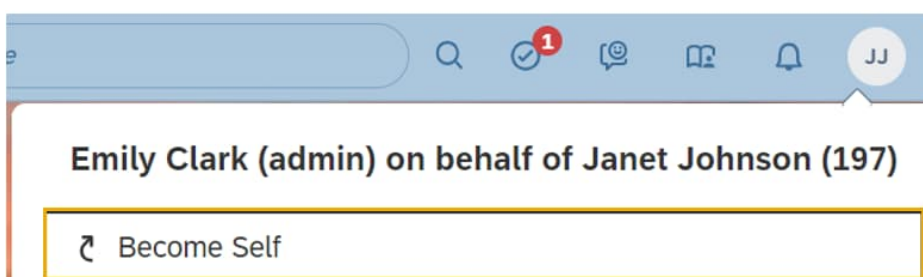
- Select the **Save** button to save the Work Permit Info changes with the new expiration date.
- Navigate back to the Home Page, from the main menu.



10. select **Done** in the engagement card to clear it.



11. In the name menu, select **Become Self** to return as an administrator.



In this activity, you have successfully verified that an EC Alert was triggered based on the Work Permit Expiration Date within a month, reviewed its details and updated the Work Permit details as an employee. As a last step, you set the action as Done to clear out the engagement card in the Home Page.

LAB ACTIVITY #4 – Assign and test Business Rule to Calculate Employee's Age in Biographical Information

In this activity, you will be assigning the business rule to calculate transient field and set employee's age based on the date of birth in Biographical Information. A custom field of type "double" was created in *personInfo* to store the Employee's Age. And a business rule *CalculateAge* was created on the Basic scenario to set employee age based on the difference between the date of birth and today's date.

Details of the Business Rule are found below:

Business Rules (2)

Rule Name

Rule ID

Scenario

Rule Type

Base Object

Last Modified By

Assigned

CalculateAge

CalculateAge

Basic (_basic)

Employee Updates (EmployeeUpdates)

personInfo

System Admin (adminJMT)

>

Basic Information

Parameters

Start Date

01/01/1900

Rule Type

Employee Updates (EmployeeUpdates)

Description

Calculate Employee's Age in Biographical Information (onView)

Name

Object

Context

System Context

Biographical Information

Biographical Information

+ Variables

If

This rule is always true.
To add an expression please uncheck the Always True checkbox.

Then

Set **Biographical Information.Employee's Age** to be equal to **Difference In Years Round Down()**
From Date: **Biographical Information.Date Of Birth**
To Date: **Today()**

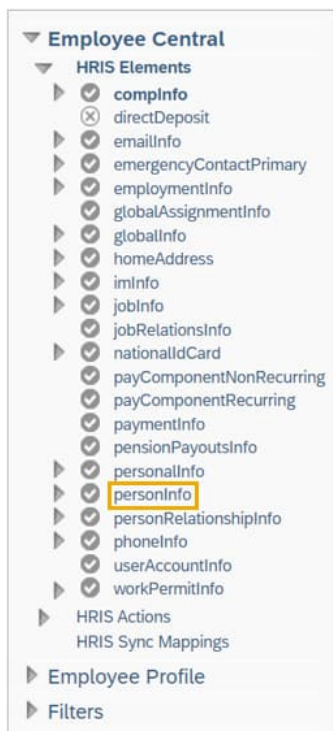
1. Navigate to *Manage Business Configuration* using Action Search. A custom paraphrase was set in the instance for an easier search. You can type **bcui** or **BCUI** directly, and it will display *Manage Business Configuration* tool from the available actions.

bcui

Actions

Manage Business Configuration

2. Select personInfo



3. In the *personInfo* element, select Take Action > Make Correction

The screenshot shows the configuration page for the 'personInfo' element. The breadcrumb trail at the top is 'Employee Central > HRIS Elements > personInfo'. On the right, the 'Take Action' dropdown is open, and the 'Make Correction' option is highlighted with a yellow box. The main content area shows the following configuration:

- Identifier: **personInfo** ?
- Label: **Biographical Information** ?
- Default Label: **Biographical Information** ?
- Enabled: **Yes** ?

Below this is a table of HRIS Fields:

Identifier	Label	Enabled	Mandatory	(20) More
person-id-external	Person Id ?	Yes	No	Details
date-of-birth	Date Of Birth ?	Yes	No	Details Sy
country-of-birth	Country Of Birth ?	Yes	No	Details
region-of-birth	Region Of Birth ?	Yes	No	Details
place-of-birth	Place Of Birth ?	No	No	Details
birth-name	Birth Name ?	No	No	Details
date-of-death	Date of Death ?	Yes	No	Details
custom-double1	Employee's Age ?	Yes	No	Details

4. Scroll down to the Trigger Rules section. You will see in the first dropdown for the Base Object the Biographical Information as default and the fourth drop down Enabled=Yes. Leave them as-is, and select the following options for the 2nd and 3rd dropdown options:
 - Event Type = **onView**
 - Rules = **CalculateAge (CalculateAge)**

Trigger Rules


Base Object	Event Type *	Rules *	Enabled	(1) More
Biographical Information	onView	CalculateAge (CalculateAge)	Yes	Details

5. Scroll down and select Save, to save your changes.

6. In the action search, you will search for one of the employees in the organization. Type **Wilson Gale** and select the name on the results to navigate to the Employee File

NOTE: In the image below, the result that will display first is under the action search, and you can select the employee's name. But, when hover over, you may see a quick card that pops up on the left with the Employee Details. You can also select on the name from there to navigate to the Employee File.

Employee Details




Wilson Gale (wgale)

+1 650 679 2322

jadger@successfactors.com

wilson gale

People



Wilson Gale (wgale)

VP, Operations


+1 650 679 2322

7. Scroll down to locate the Biographical Information or use the Sections to navigate. In the *Personal Information* section, select to expand the dropdown options (subsections), and select *Biographical Information*.

Personal Information ▾

- National ID Information
- Address Information
- Personal Information
- Biographical Information**

8. In the Biographical Information, notice that the Employee's Age displays a value of 0. The rule tries to calculate but there is no Date of Birth yet. Select the pencil icon to add Biographical Information details for this employee.


Biographical Information 

Person Id	wgale	Region Of Birth	-
Date Of Birth	-	Employee's Age	0
Country Of Birth	-		

9. Set the Date of Birth to **04/23/1968**. You can type directly **04231968** and click away to populate the date or select it from the calendar.

Biographical Information


Person Id
wgale

Date Of Birth
04231968 

Country Of Birth
No Selection ▼

Region Of Birth

10. Select Save to save the changes. Verify that the age has been updated to **55**.

Biographical Information 

Person Id	wgale	Region Of Birth	-
Date Of Birth	Apr 23, 1968	Employee's Age	55
Country Of Birth	-		


11. In the action search, type **Carla Grant** and navigate to the Employee File.


carla grant

People

 **Carla Grant** (cgrant) (+1) 404 665-3421
VP, Sales

12. Navigate to the Biographical Information and verify that the Age is also set for those employees that already had the Date of Birth in their biographical details.

Biographical Information 

Person Id	cgrant1	Region Of Birth	-
Date Of Birth	Jul 18, 1975	Employee's Age	48
Country Of Birth	 United States		



In this activity, you have successfully assigned the business rule to calculate employee's age in Biographical Information and verified it calculates the transient field when updating the details as well as appears for employees with date of birth already set.

NOTE: Alternatively, you could display the Employee's Age as masked (Personally Identifiable Information – PII) fields, to not disclose the age when viewing Biographical information, and users ultimately need to select Show to see the field value.

1. Navigate to Manage Business Configuration > personInfo > and select Details for the Employee's Age field.

The screenshot shows a configuration interface for the 'Employee's Age' field. It includes a dropdown menu set to 'custom-long1', the field name 'Employee's Age', a help icon, and two radio buttons labeled 'Yes' and 'No'. The 'Details' button is highlighted with a yellow box, along with a trash icon and an up arrow icon.

2. Select Masked=Yes on the field attributes and save changes.

The screenshot shows the 'Masked' attribute dropdown menu set to 'Yes'. A help icon is visible next to the dropdown.

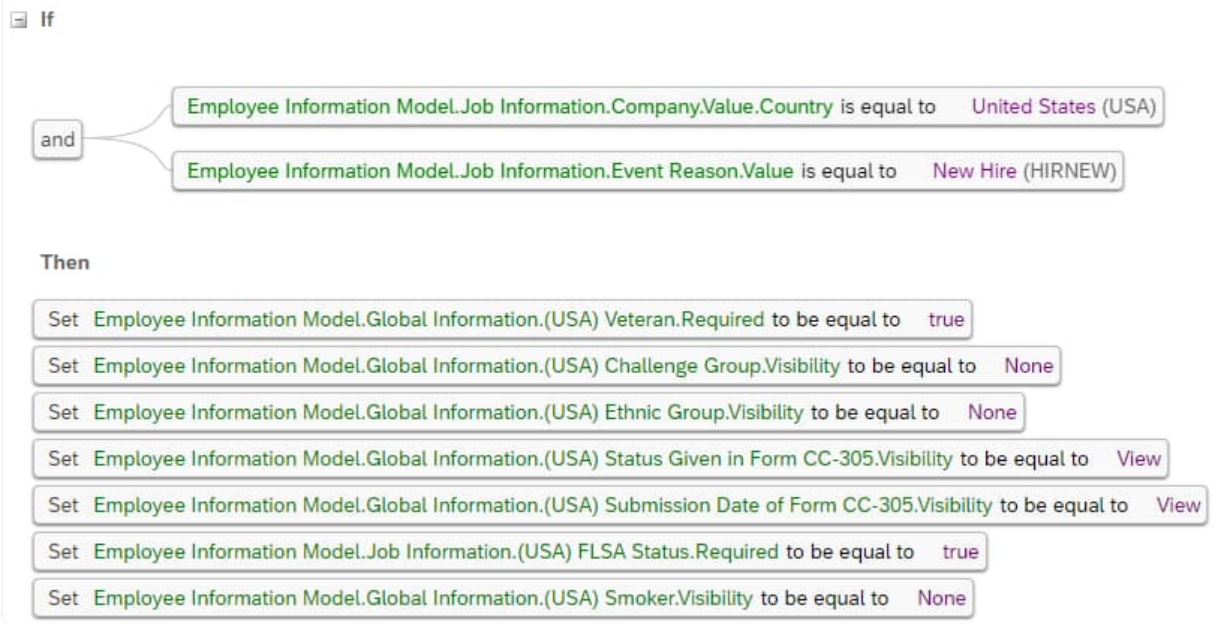
3. The data would now display hidden as per PII sensitive information.

The screenshot shows the 'Biographical Information' form. The 'Employee's Age' field is masked with asterisks (*****). The 'Show' button is highlighted with a yellow box. Other fields include 'Person Id' (cgrant1), 'Date Of Birth' (Jul 18, 1975), and 'Country Of Birth' (United States).

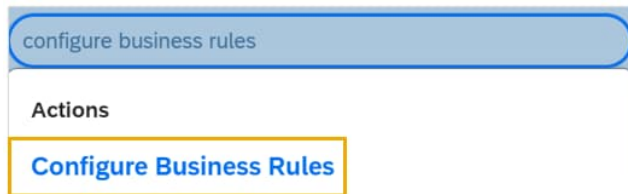
LAB ACTIVITY #5 – Modify a Business Rule for Hire/Rehire to Default Field attributes.

In this activity, you will be reviewing and making some changes in an existing rule in the *Trigger Rules for Hire/Rehire* scenario to hide some USA Country-Specific fields, and make a field required in the Hire Wizard.

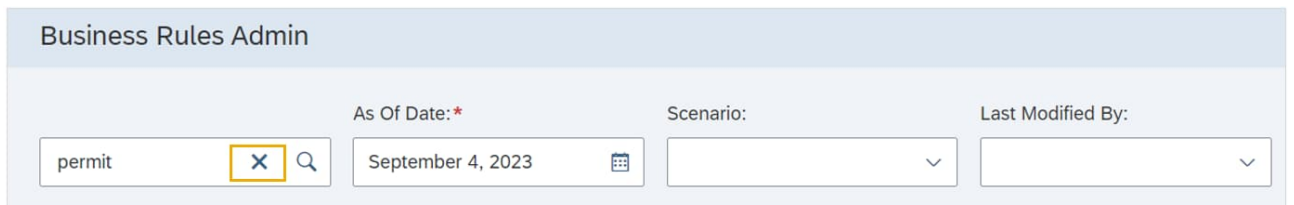
Currently, the business rule is setting field attributes of some *globalInfo* USA fields as well as *jobInfo* USA fields when Event Reason is New Hire, and the Company country is USA



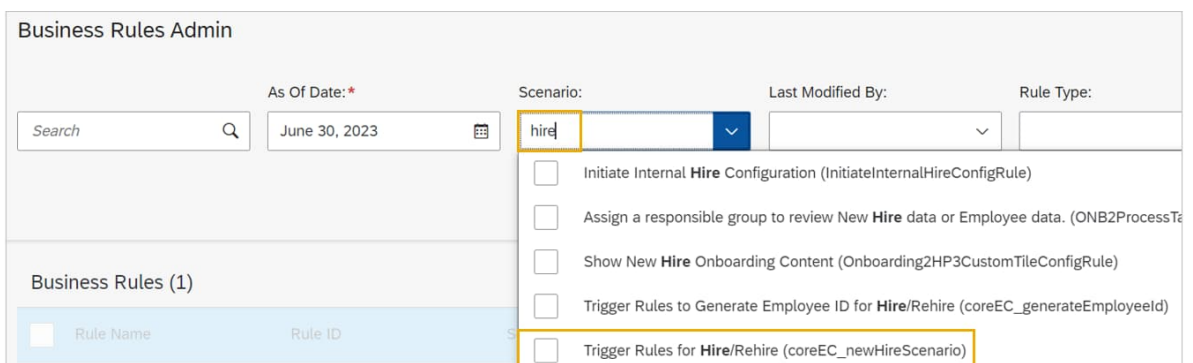
1. Navigate to Configure Business Rules using action search



2. Clear the permit text from your previous search in Activity #1.



3. Select the *Scenario* filter, type **hire** and display all the associated results in the dropdown. Select the checkbox for the **Trigger Rules for Hire/Rehire (coreEC_newHireScenario)**



4. Click away to set your selection. Select **Go** to start the search.

Scenario: Trigger Rule... x Last Modified By: Rule Type: Base Object: Go Adapt Filters (2)

- Select the **Hire_BR_Fields_USA** Business Rule, already assigned.

Rule Name	Rule ID	Scenario	Rule Type	Base Object	Last Modified By	Assigned
<input type="checkbox"/> Hire_BR_Fields_USA	Hire_BR_Fields_USA	Trigger Rules for Hire/Rehire (coreEC_newHireScenario)		HireActionModel	System Admin (adminJMT)	<input checked="" type="checkbox"/>
<input type="checkbox"/> WF_Hire	WF_Hire	Trigger Rules for Hire/Rehire (coreEC_newHireScenario)		HireActionBean	Emily Clark (admin)	<input checked="" type="checkbox"/>

- Select Take Action > Make Correction

History <<

01/01/1900 Take Action

Rule created

Make Correction

Copy Rule

Permanently Delete Entry

Hire_BR_Fields_USA (Hire_BR_Fields_USA)

Scenario: Trigger Rules for Hire/Rehire Change Scenario

01/01/1900

Description

Base Object Type Employee Information Model

- Scroll down to the **Then** section (statements) and hover over in that area to display the **Add Expression** option.

If

and

Employee Information Model.Job Information.Company.Value.Country is equal to United States (USA)

Employee Information Model.Job Information.Event Reason.Value is equal to New Hire (HIRNEW)

Then

Add Expression Clear All

Set Employee Information Model.Global Information.(USA) Veteran.Required to be equal to true

Set Employee Information Model.Global Information.(USA) Challenge Group.Visibility to be equal to None

Set Employee Information Model.Global Information.(USA) Ethnic Group.Visibility to be equal to None

Set Employee Information Model.Global Information.(USA) Status Given in Form CC-305.Visibility to be equal to View

Set Employee Information Model.Global Information.(USA) Submission Date of Form CC-305.Visibility to be equal to View

Set Employee Information Model.Job Information.(USA) FLSA Status.Required to be equal to true

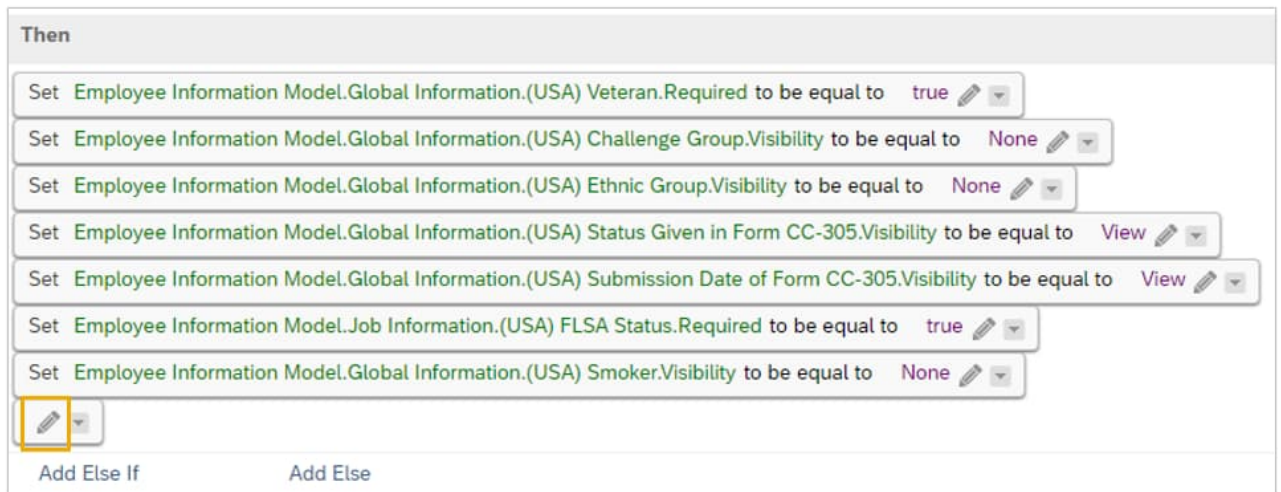
Set Employee Information Model.Global Information.(USA) Smoker.Visibility to be equal to None

Add Else If Add Else

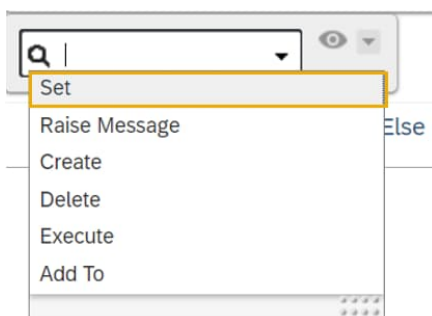
Updated by System Admin on Thursday, July 6, 2023 4:07:47 AM EDT

Cancel Save

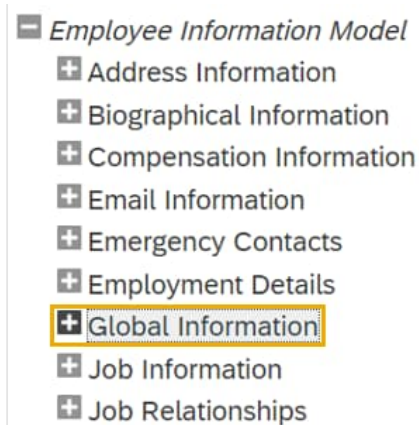
- A new row will be added. Select the pencil icon to add a new expression.




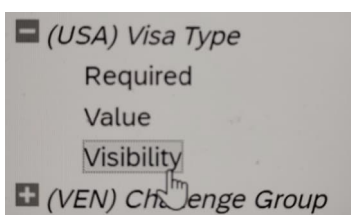
9. Select **Set** on the *Select Output Type* dropdown list



10. In the *Select Left Expression*, expand **Global Information**, selecting the  icon



11. Within the Global Information fields, scroll down all the way to locate the (USA) country specific fields. Select  for the last available field **(USA) Visa Type** to expand options to set field attributes. You will select **Visibility**.



12. As the last step, select in the drop down located on the right, **None** as the visibility:

The screenshot shows a rule editor interface. At the top, there are several dropdown menus: 'Set', 'Employee Information Model.Global Information.(USA) Visa Type.Visibility', 'to be equal to', 'Value', and 'No Selection'. Below these, there are two buttons labeled 'Add Else If' and 'Add Else'. On the right side, a dropdown menu is open, showing options: 'None', 'Edit', and 'View'. The 'None' option is highlighted with a yellow border.

13. Select **Save** to save changes in the Business Rule

14. The new statement included in the rule will hide the *Visa Type* field in the Global Information when Country of employment is United States, and the Event Reason is New Hire.

The screenshot shows the final configuration of the rule. It displays the text: 'Set Employee Information Model.Global Information.(USA) Visa Type.Visibility to be equal to None'. The text is in a light blue box with a white border.



In this activity, you have successfully added a new expression in the existing business rule to set field attributes in the Hire Wizard, to hide one of the Country Specific fields for USA, not relevant when hiring an employee.

LAB ACTIVITY #6 – Verify a Cross Entity Business Rule will add a new pay component when location changes.

In this activity, you will be testing a Cross-Entity business rule and verify the system creates a new pay component in Compensation Information as an annual relocation bonus to cover financial expenses.

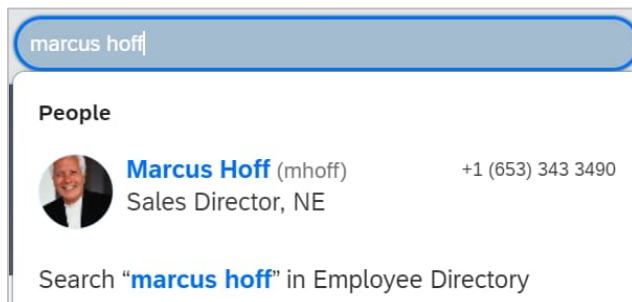
This rule below will create a new Relocation Bonus pay component for a value of 10000 USD if the location changes to San Francisco (USA). This rule is already assigned as *onChange* event type in the location hrinfo field.

NOTE: The *onChange* event type for Cross Entity scenario can be tested in Manager Self-Service (MSS), selecting **Change Job and Compensation Info** from the Actions menu, but it is required to select both Job Information and Compensation Information for this rule to work.

The screenshot shows a business rule editor. The 'If' section contains two conditions connected by an 'and' operator: 'Job Information Model.Location.Value is not equal to Job Information Model.Location.Previous Value' and 'Job Information Model.Location.Value is equal to San Francisco, USA (US_SF)'. The 'Then' section contains an action: 'Create Job Information Model.Employment Details Model.Compensation Information Compensation Information'. Below the action, it says 'The rule selects one entry from the collection "Compensation Information" where...'. The entire rule is enclosed in a light blue box with a white border.

Populate Job Information Model. Employment Details Model. Compensation Information ≡. Compensation ≡ with:	
Amount	10000
Currency	USD
Event Date	Job Information Model. Employment Details Model. Compensation Information ≡. Event Date The rule selects one entry from the collection "Compensation Information" where...
Frequency	Annual (ANN)
Pay Component	Relocation Bonus (US_REL)

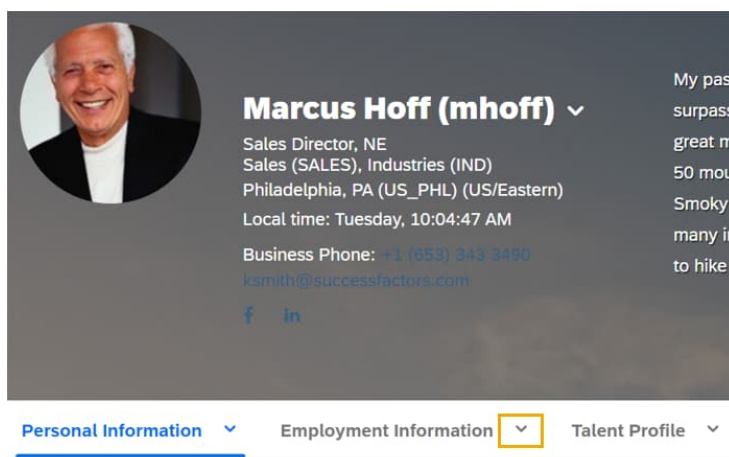
1. Type *Marcus Hoff* in the actions and people search.



2. Select Marcus Hoff to navigate to the Employee File.



3. In the Employee File, select the option to expand the subsections in **Employment Information** section.



4. Select **Compensation Information**

Change Job and Compensation Info

▼ What would you like to change?


☒ Job Information
Change employee's job data, time information, and other information.

☐ Job Relationships
Specify the employer's HR Business Partner, legal advisors, and others besides the primary manager.

☒ Compensation Information
Change the salary, bonus, eligibility for benefits, and other information.

8. Select Today's date as the effective date.

When would you like your changes to take effect? *

Oct 04, 2023 

9. In the Organization Information, find the Location field and select the dropdown list to change the current location *Philadelphia, PA (US_PHL)* to **San Francisco, USA (US_SF)**.

Organization Information

Company *
Ace USA (ACE_USA) ▼

Business Unit *
Corporate Industries (ACE_IND) ▼




Division
Industries (IND) ▼

Department
Sales (SALES) ▼

Location
San Francisco, USA (US_SF) ▼
Philadelphia, PA (US_PHL)

10. Scroll down to the Compensation Information and notice the Total Earning Opportunity (TEO) is being increased by +10000 USD, to a total of 205.000 USD.

Compensation Information

Compa Ratio	Range Penetration	AnnualizedSalary (AnnualizedSalary)	Total Earning Opportunity (TEO)
121.18%	85.36%	162,500.000 USD	205,000.000 USD
			
			195,000.000 USD

11. Continue scrolling down and check the Pay Targets, where the Performance Bonus is shown. Verify a new pay component Relocation Bonus (US_REL) with a value of 10000 USD and a frequency Annual (ANN) has been created in the Compensation Information when location changed. This additional bonus has increased the TEO value from the previous step.

Change Job and Compensation Info

Pay Component*	Amount*	Currency*	Frequency*
Calculated Amount: -----			
<div>Add</div>			
Pay Targets			
Pay Component*	Amount*	Currency*	Frequency*
Performance Bonus (...)	32,500	USD	Annual (ANN)
Number: <input type="text"/>			
Unit of Measure: No Selection			
Calculated Amount: -----			
Relocation Bonus (US...	10,000	USD	Annual (ANN)

Save

Cancel

12. **Save** changes.

Save

Cancel

13. Notice a Workflow will be submitted to approve the Transfer – Location of the employee. Select **Confirm**.

Please confirm your request

Submitting Transfer - Location request for Marcus Hoff.

Enter your comment here

Show workflow participants

Confirm

Cancel

NOTE: It is not necessary to complete the approval workflow this time. The purpose of the activity is to test the *onChange* Cross-Entity rule which was fulfilled on the previous steps.



In this activity, you have successfully tested a cross entity business rule between Job Information and Compensation Information, that will be creating data (new Pay Component) in Compensation Information when location field in Job Information is changed in MSS.

LAB ACTIVITY #7 – Add a Custom FO field to a Position to Job Information propagation rule.

The organization has created a new Custom Foundation Object (Sub Department) to maintain a lower level of organization hierarchy with an association with their corresponding departments. Therefore, a custom field to store Sub Department has been created in Job Information.

Position assignment (from hiring or employee changes) should propagate all the organizational, job and position-specific details into some of the equivalent fields in the Job Information. The Position object definition also includes a custom field to assign to the Sub Department.

In this activity, you need to modify the Position to Job Information data propagation rule, to make sure the Sub Department value is copied over the Job Information when a position is assigned.

1. Navigate to Manage Business Configuration using action search. You can type **bcui**

2. Select *jobInfo* from the left section.

3. In the **HRIS Fields** section, locate the *position* field and select **Details**.
NOTE: You don't need to select *Take Action > Make Correction* at this step

Employee Central HRIS Elements jobInfo

Identifier * jobInfo ?

Label Job Information ?

Default Label Job Information ?

Enabled Yes ?

HRIS Fields

Identifier	Label	Section	Enabled	(21) More
position	Position ?	Position Information (jobInfo_positionInfoList) [?] [?]	Yes	Details
positionEntryDate	Position Entry Date ?	Position Information (jobInfo_positionInfoList) [?] [?]	Yes	Details
timeInPosition	Time In Position ?	Position Information (jobInfo_positionInfoList) [?] [?]	Yes	Details
company	Company ?	Organization Information (jobInfo_orgFieldsList) [?] [?]	Yes	Details SysTr

4. Scroll down to *Trigger Rules* and select the card icon on the Position to Job Propagation (Pos2Job) business rule.

Details

Maximum Length 0 ?

Maximum Fraction Digits ?

Show Trailing Zeros No ?

Allow Import No ?

Refresh Compensation Required No ?

Mapped Domain Attribute Name

Field Criteria

Destination Field Value	Source Field Name
HRIS Sync Mapping:Standard Field	
Standard Field	Entity Type Entity Name
HRIS Sync Mapping:User Info Field	
User Info Field	Entity Type Entity Name
HRIS Sync Mapping:User info Record Key	
Key	Entity Type Entity Name

Trigger Rules

Base Object	Event Type	Rules	Enabled	(1) More
Job Information	onChange	Position to Job Propagation (Pos2Job) [?] [?]	Yes	Details

Done

5. In the Business Rule Admin, select **Take Action > Make Correction** to make changes in the Business Rule.

Configure Business Rules

Search :Rule [?] No Selection Advanced ▾

History <<

01/01/1900 Take Action ▾

Rule created

Make Correction

Copy Rule

Permanently Delete Entry

01/01/1900

Description

Position to Job Propagation (Pos2Job)

Scenario: Synchronize Position Changes to Incumbents Change Scenario

Parameters

Name	Object
Context	System Context
Job Information	Job Information

6. In the Then section of the rule, you can see all the statements to propagate data from Position to Job Information. Hover over the section to display an **Add Expression** link. Select this option.

Then Add Expression Clear All

Set Job Information.Location to be equal to Job Information.Position.Location

Set Job Information.Business Unit to be equal to Job Information.Position.Business Unit

Set Job Information.Division to be equal to Job Information.Position.Division

Set Job Information.Department to be equal to Job Information.Position.Department

Set Job Information.Job Classification to be equal to Job Information.Position.Job Code

Set Job Information.Job Title to be equal to Job Information.Position.Job Title

Set Job Information.Cost Center to be equal to Job Information.Position.Cost Center

Set Job Information.Pay Grade to be equal to Job Information.Position.Pay Grade

7. A new row will be added at the end. Select the pencil icon to add a new expression.

Set Job Information.Cost Center to be equal to Job Information.Position.Cost Center

Set Job Information.Pay Grade to be equal to Job Information.Position.Pay Grade

8. Select Set from the available rule actions.

Set

Raise Message

Create

Delete

Execute

Add To

9. In the *Select Left Expression* drop down, select **Sub Department**

Set Job Information Sub Department

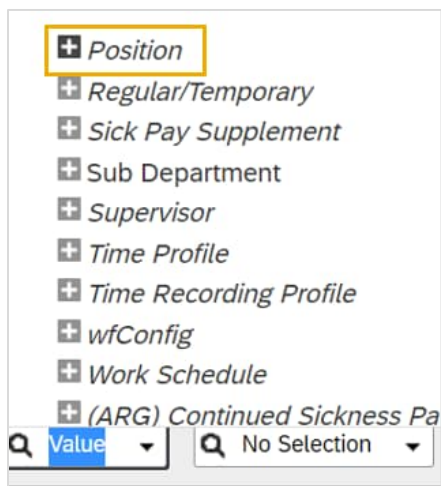
Set Job Information Supervisor

Set Job Information Time In Job

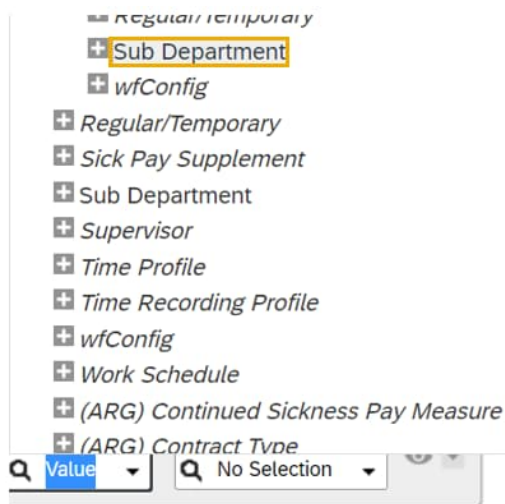
10. Leave the *to be equal* dropdown as-is and select the **Value** dropdown to continue.

Set Job Information.Pay Grade to be equal to Job Information.Position.Pay Grade

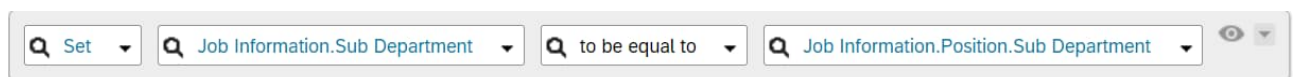
11. Locate Position and expand it to see its fields.



12. Select Sub Department (DO NOT EXPAND)

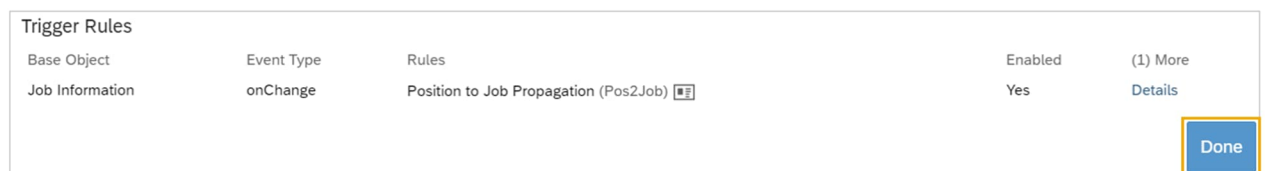


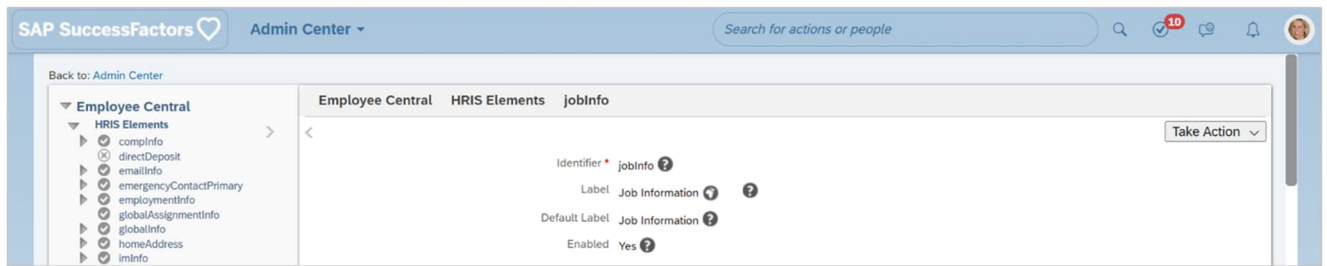
13. Verify the expression looks like this example:



14. Choose **Save** to save all your changes. Once saved, you can close the window that displays the business rule, to go back to the main screen.

15. Select **Done** to close the hris-field position details.



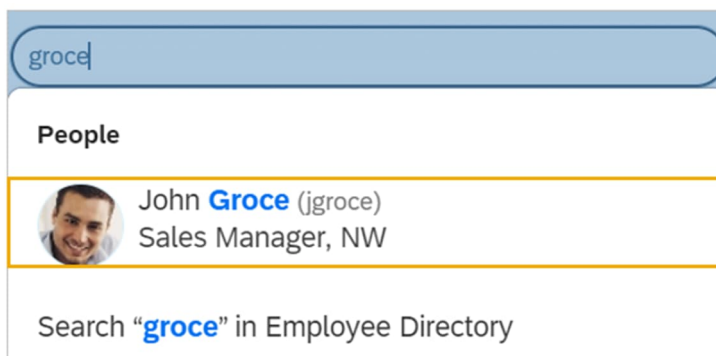


In this activity, you have successfully modified a business rule to propagate Position data to Job Information to add a propagation for the Sub Department value.

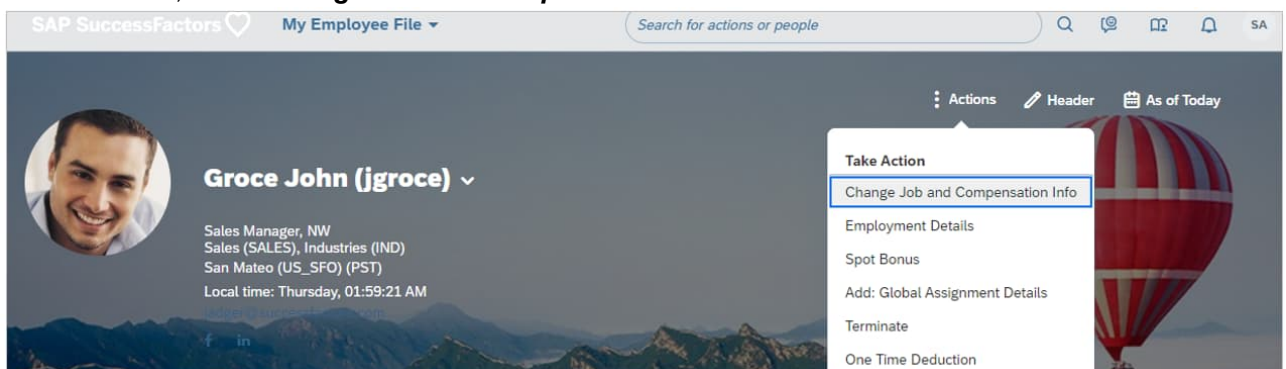
LAB ACTIVITY #8 – Test propagation rule from Position to Job Information.

In this activity, you will initiate employee changes to complete a position assignment and verify the propagation of the organizational, job and position specific data from the Position record into the Job Information of the employee. The Sub Department value should also be auto filled based on the changes done in the previous activity, since the expression to set Sub Department in Job Information to be equal to the Sub Department in the Position was set in the business rule.

1. In the actions and people search, type **groce** and select the employee **John Groce** from the results, to navigate to their Employee File.



2. On the Actions, select **Change Job and Compensation Info**



3. Select **Job Information** and set **today's date** as the effective date (you can type **10042023** or select the date from the calendar).

Change Job and Compensation Info

▼ What would you like to change?

☒ Job Information
Change employee's job data, time information, and other information.

☐ Job Relationships
Specify the employer's HR Business Partner, legal advisors, and others besides the primary manager.

☐ Compensation Information
Change the salary, bonus, eligibility for benefits, and other information.

When would you like your changes to take effect? *

Oct 04, 2023

- In the *Position* field, select once to highlight the existing position, and clear it.

When would you like your changes to take effect? *

Oct 04, 2023

Position Information

Incumbent of Parent Position

No Selection

Position

Sales Manager, NW (M)

▼

Position

No Selection

▼

Sales Manager, NW (MGR_SALES_NW2)

- Now, with the field empty, you can type **regional** and select the **Regional Director - North America (GCS_DIR_NA)** which is one of the vacant positions available.

NOTE: You can also search for the available positions using the dropdown option.

Position Information

Incumbent of Parent Position

No Selection

Position

regional

▼

Regional Director - North America (GCS_DIR_NA)

To be hired:Yes

Position Entry Date

Feb 01, 2010

Organization Information

- Verify how the propagation rule triggers and the field values are updated/added based on the new Position attributes. Notice the Sub Department field is also auto filled.

Change Job and Compensation Info

When would you like your changes to take effect?*

Oct 04, 2023

Position Information

Incumbent of Parent Position: No Selection

Position: Regional Director - N...
Sales Manager, NW (MGR_SALES_NW2)

Position Entry Date: Feb 01, 2010

Time In Position: 13 Years 8 Months 1 Days

Organization Information

Company*: Ace USA (ACE_USA)

Business Unit*: Global Consulting Services (GCS)

Division: GCS North America (GCS_NA)

Department: Consulting Services (GCS)

Location: Philadelphia, PA (US_PHL)

Timezone: US/Eastern (GMT-04:00)

Cost Center: GCS Canada (7700009)

Sub Department: Management Consulting (GCS_SD1)

7. Select **Cancel**



8. Select **Don't Save**

Please confirm

You have unsaved changes. All your changes will be lost.

Save Don't Save Cancel



In this activity, you have tested the propagation rule by completing a position assignment and verify if propagates the data from the Position, including the value of Sub Department that was added in the previous activity.

OPTIONAL ACTIVITY #9 – Change a Business Rule scenario from Basic to application-specific.

In this activity, you will change one of your existing business rules created in Basic scenario to an application-specific scenario to better organize your rules and rule assignments.

1. Navigate to *Configure Business Rules* using action search.

configure business rules

Actions

Configure Business Rules


- Clear the Scenario selected from a previous activity. Select the **X** to reset.

Search

As Of Date: *
September 4, 2023

Scenario:
Trigger Rule... X

Last Modified By:

- In the search field, type **hire** and select  to search the business rule.

Business Rules Admin

hire X

- Select the **EVENT_NEWHIRE (SAP_EVENT_NEWHIRE)** business rule from the results. Notice the rule is on the *Basic* scenario, and there is no guidance on the rule assignment (Assigned column is empty).

Business Rules Admin

hire X

As Of Date: *
August 9, 2023

Scenario:


Last Modified By:

Rule Type:

Base Object:

Go Adapt Filters (2)

Business Rules (8)

<input type="checkbox"/>	Rule Name	Rule ID	Scenario	Rule Type	Base Object	Last Modified By	Assigned
<input type="checkbox"/>	EC_NEWHIRE_APPROVAL	EC_NEWHIRE_APPROVAL	Trigger Rules for Hire/Rehire (coreEC_newHireScenario)		HireActionBean	HOL Admin (HOL103)	
<input type="checkbox"/>	EVENT_HIRE	SAP_EVENT_HIRE	Basic (_basic)		jobInfoModel	HOL Admin (HOL103)	>
<input type="checkbox"/>	EVENT_NEWHIRE	SAP_EVENT_NEWHIRE	Basic (_basic)		jobInfoModel	HOL Admin (HOL103)	>

- Choose the arrow on the right section or select the central area to open the rule details.

Business Rules Admin

hire As Of Date: August 9, 2023 Scenario: Last Modified By: Rule Type: Base Object:

Go Adapt Filters (2)

Business Rules (8)

Rule Name	Rule ID	Scenario	Rule Type	Base Object	Last Modified By	Assigned
EC_NEWHIRE_APPROVAL	EC_NEWHIRE_APPROVAL	Trigger Rules for Hire/Rehire (coreEC_newHireScenario)		HireActionBean	HOL Admin (HOL103)	
EVENT_HIRE	SAP_EVENT_HIRE	Basic (_basic)		jobInfoModel	HOL Admin (HOL103)	
EVENT_NEWHIRE	SAP_EVENT_NEWHIRE	Basic (_basic)		jobInfoModel	HOL Admin (HOL103)	

- Select **Change Scenario**. A new navigation wizard will open.

Configure Business Rules

Search :Rule No Selection Advanced

History «

01/01/1900 Take Action
Rule created

EVENT_NEWHIRE (SAP_EVENT_NEWHIRE)

Scenario: Basic **Change Scenario**

Basic Information

Start Date 01/01/1900

Rule Type

Description This is a rule to trigger new hire Event

- In the *Back Up Your Data* step, it is assumed the data has been backed up already to use the original business rule if things don't go as planned. Continue to the next step, selecting **Step 2**

Change Scenario for Rule "SAP_EVENT_NEWHIRE"

1 Back Up Your Data 2 Choose New Rule Scenario 3 Select Attributes 4 Validate

1. Back Up Your Data

This rule currently uses the "Basic" rule scenario, which doesn't provide any guidance about the various objects, parameters and actions you could use to configure the rule. Changing to an application-specific scenario can help you prevent errors. However, as not all applications provide specific scenarios yet, you might not be able to find a fitting scenario for your rule.

Please note: Once you change the rule scenario, you cannot change it back to "Basic". As such, before you change the scenario, we recommend that you always export the current rule definition first. That way you have something to fall back on if the new rule scenario doesn't work as planned.

To back up your data now, go to: [Import and Export Data](#)

Step 2

- In the *Choose New Rule Scenario* step, type **trigger event**, to filter the available scenarios to select from. You should see one result "**Trigger onPostSave Events for Job Information.**"

Change Scenario for Rule "SAP_EVENT_NEWHIRE"

1 Back Up Your Data — 2 Choose New Rule Scenario — 3 Select Attributes — 4 Validate

2. Choose New Rule Scenario

trigger event x

All Categories

Scenario

Trigger onPostSave Events for Job Information

You can use this scenario to create rules that trigger events after changes to Job Information are saved. In Manage Business Configuration, rules created using this scenario can be registered only for the onPostSave event type.

9. Select the scenario:

Change Scenario for Rule "SAP_EVENT_NEWHIRE"

1 Back Up Your Data — 2 Choose New Rule Scenario — 3 Select Attributes — 4 Validate

2. Choose New Rule Scenario

trigger event x

All Categories

Scenario

Trigger onPostSave Events for Job Information

You can use this scenario to create rules that trigger events after changes to Job Information are saved. In Manage Business Configuration, rules created using this scenario can be registered only for the onPostSave event type.

10. Select the **Step 3** button that appears.

Scenario

Trigger onPostSave Events for Job Information

You can use this scenario to create rules that trigger events after changes to Job Information are saved. In Manage Business Configuration, rules created using this scenario can be registered only for the onPostSave event type.

Step 3

11. In the *Select Attributes* step, select the only option available as Base Object (**Job Information Model**).

Change Scenario for Rule "SAP_EVENT_NEWHIRE"

1 Back Up Your Data — 2 Choose New Rule Scenario — 3 Select Attributes — 4 Validate

3. Select Attributes

Base Object *

Job Information Model

Please select values for all mandatory attributes (*) to proceed to the next step.

12. Select **Step 4** to continue.

3. Select Attributes

Base Object *

Job Information Model

Select a base object for which you want to trigger PostSave events.

Please select values for all mandatory attributes (*) to proceed to the next step.

Step 4

13. In the last *Validate* step, verify the validation results are correct and there are no errors in the rule.

Change Scenario for Rule "SAP_EVENT_NEWHIRE"

1 Back Up Your Data — 2 Choose New Rule Scenario — 3 Select Attributes — 4 Validate

4. Validate

Validation Results

✓ This scenario can be assigned to the rule. The rule doesn't contain any errors.

Valid from: 01/01/1900

✓ The rule does not contain any errors for this effective date.

Please note: Once you've hit the Submit button, there is no way to undo the changes. To back up your data now, go to: [Import and Export Data](#)

14. Scroll down and select **Submit** to convert the rule from Basic into *Trigger onPostSave Events for Job Information* scenario.

Submit Cancel

15. You will see a confirmation that the Scenario has been changed successfully.

Change Scenario for Rule "SAP_EVENT_NEWHIRE"

Scenario changed successfully

16. In the bottom right corner, choose **Done** to close this menu.
17. Verify the Business Rule displays now the specific scenario and the rule assignment. In this case, you can see the rule is NOT assigned yet, otherwise the "dot" would be checked.

History «

01/01/1900 Take Action ▼

Rule created

● EVENT_NEWHIRE (SAP_EVENT_NEWHIRE)

Scenario: Trigger onPostSave Events for Job Information Change Scenario

Basic Information		Parameters
Start Date	01/01/1900	Name
Description	This is a rule to trigger new hire Event	Context
Base Object	Job Information Model	Job Information Model

18. Select the “dot” to assign the business rule.



History «

01/01/1900 Take Action
Rule created

EVENT_NEWHIRE (SAP_EVENT_NEWHIRE)

Scenario: Trigger onPostSave Events for Job Information Change Scenario

Basic Information		Parameters
Start Date	01/01/1900	Name
Description	This is a rule to trigger new hire Event	Context
Base Object	Job Information Model	Job Information Model

19. Select **Assign Rule**



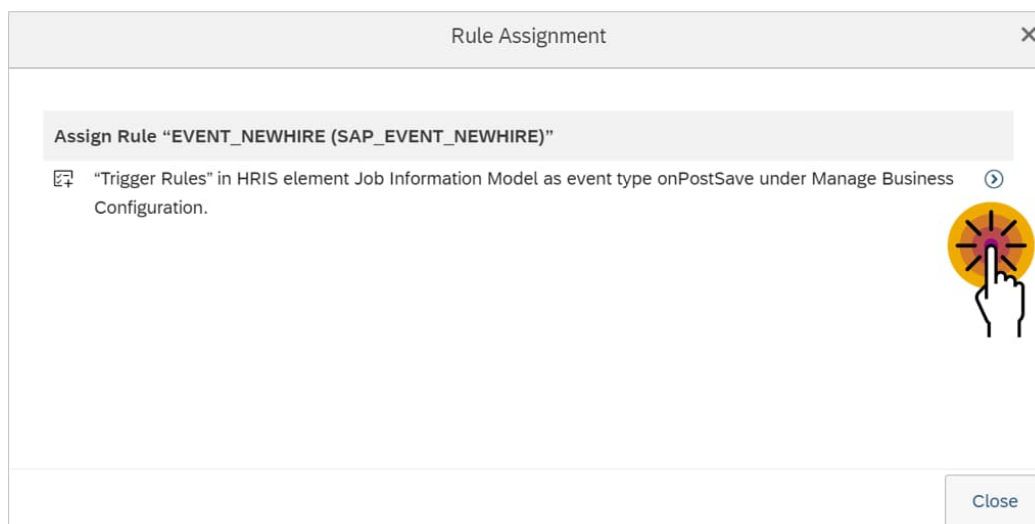
Rule Assignment

Assignment of Rule “EVENT_NEWHIRE (SAP_EVENT_NEWHIRE)”

The rule is not assigned.

Assign Rule Close

20. Select the option **Open assignment page**. A new tab will be opened (do not close the other tab as you will need to navigate back later)



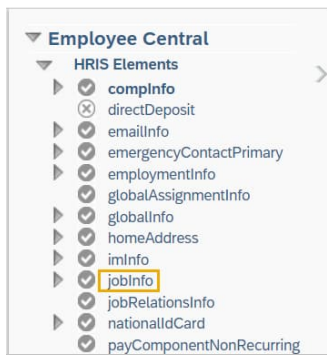
Rule Assignment

Assign Rule “EVENT_NEWHIRE (SAP_EVENT_NEWHIRE)”

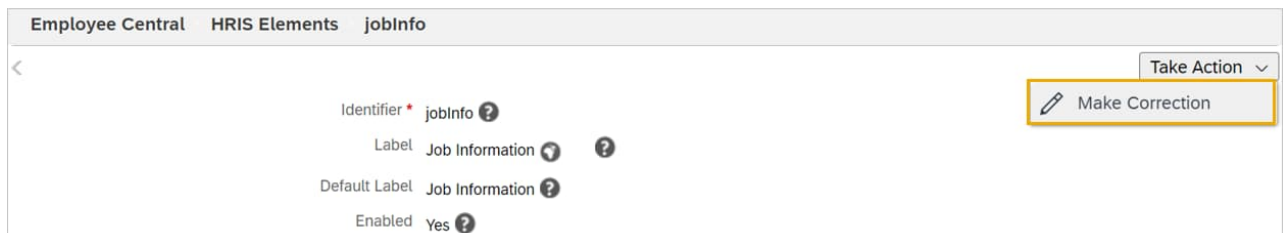
“Trigger Rules” in HRIS element Job Information Model as event type onPostSave under Manage Business Configuration.

Close

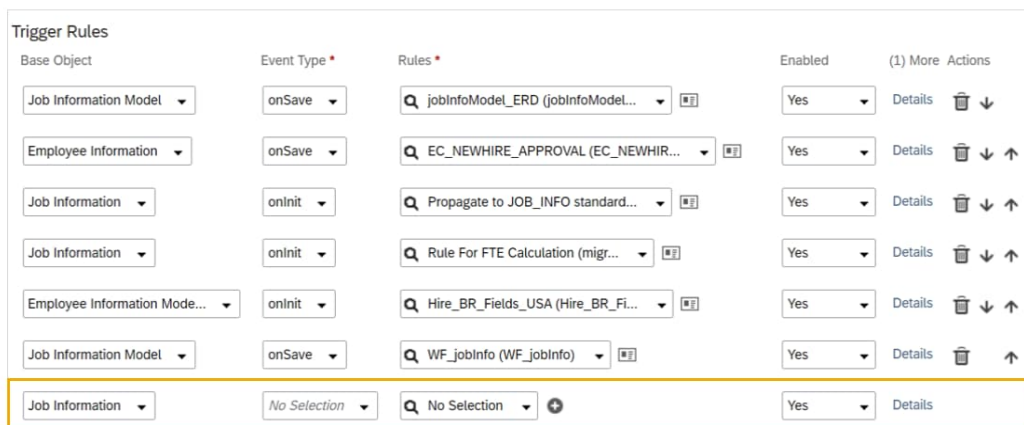
21. On the Manage Business Configuration page, select **jobInfo** from the HRIS Element list on the left side.



22. Select **Take Action > Make Correction**



23. Scroll down to the **Trigger Rules** section. You will add the rule assignment details at the end.



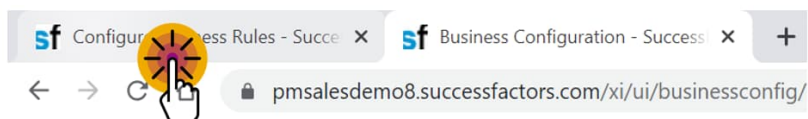
24. Add the following details:

- Base Object: **Job Information Model**
- Event Type: **onPostSave**
- Rules: **EVENT_NEWHIRE (SAP_EVENT_NEWHIRE)**
- Enabled: **Yes**



25. Select **Save** to save changes. You may see a Confirm pop-up dialog with some automatic changes. Select **Confirm** to continue.

26. You can now close this tab or navigate to the other tab opened with the Business Rule Admin.



27. Close the **Rule Assignment** pop-up dialog.

✕

Assign Rule "EVENT_NEWHIRE (SAP_EVENT_NEWHIRE)"

"Trigger Rules" in HRIS element Job Information Model as event type onPostSave under Manage Business Configuration.
 ?

Close

28. Verify the rule is now assigned.

✔
EVENT_NEWHIRE (SAP_EVENT_NEWHIRE)

Scenario: Trigger onPostSave Events for Job Information
Change Scenario



In this activity, you have successfully changed a business rule scenario from Basic to application specific. As a result of the change, you noticed the rule was not assigned and completed the assignment in Manage Business Configuration.

NOTE: Why did we change the scenario from Basic to Application Specific?

It is a best practice recommendation to switch to application specific scenarios whenever possible and create new rules using these scenarios rather than setting up the rule in Basic scenario.

- Your rules will be better organized. Although you can use the picklist Rule Type to classify the Basic rules, it is easier to filter by scenario when you have multiple rules in your instance.
- Basic rules do not offer guidance on rule assignment. As seen on this final activity, we couldn't determine that the EVENT_NEWHIRE rule was assigned, unless we look into the place directly where it could be assigned.
- The new enhancement in 1H 2023 to export rules including their assignment information does only include this data in application specific rules, not the Basic rules.
- At a certain stage, the Basic rules might be deprecated. There are currently some checks in the Check Tool to mass change rules from Basic to application specific scenarios (only possible with Event Reason Derivation and Workflow rules).

Employee Central Core: Rules		
<input type="checkbox"/>	All rules for workflows are assigned to an application-specific rule scenario. (WorkflowsNoBasicRules)	Aug 6, 2023, 11:12:01 AM by v4admin
<input type="checkbox"/>	All rules for event-reason derivation are assigned to an application-specific rule scenario. (EventReasonDerivationNoBasicRules)	Aug 6, 2023, 11:12:09 AM by v4admin

In this hands-on lab, you have learned how to more easily create powerful business rules using scenarios to drive changes in the SAP SuccessFactors Employee Central solution www.sap.com.

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