# **Assigning employee and manager permissions in SAP SuccessFactors Employee Central**

Got it 👍 You’ve pasted the **Assigning Employee & Manager Permissions in SAP SuccessFactors EC** lesson. Let me restructure it into **clear, exam-friendly notes** for you:

# 🔹 Role-Based Permissions (RBP) in ESS & MSS

## 1. ****Why use RBP for ESS & MSS?****

1. To empower **employees** (self-service) and **managers** (manager service) to handle HR tasks.
2. Reduces dependency on HR → faster updates.
3. Ensures **security**: users can only access/update data relevant to their role.
4. HR Operations acts as a **backup & approval layer**.

## 2. ****Employee Self-Service (ESS)****

1. Allows employees to directly **view/edit their own info**.
2. Example: Update phone number, address, dependents, marital status, emergency contacts.
3. **Target population = themselves.**

🔹 **RBP Structure** (3 parts):

1. **Granted population** → all employees
2. **Role** → permission to view/edit specific fields (e.g., phone number)
3. **Target population** → themselves

🔹 **How it looks in practice:**

1. Employee logs in → My Employee File → Personal Information.
2. If granted permission, can **edit their own details** (with workflow if configured).

⚠️ Guardrails: Even if users have edit access, workflows can be required for approval.

## 3. ****Manager Self-Service (MSS)****

1. Managers can **update information for their direct reports**.
2. Always tied to workflows for approvals.
3. Example:
4. Update job information (department, location, title)
5. Update salary information
6. Initiate transfers/promotions

## 4. ****Configuring RBP for ESS****

Example: ACE Corp wants to customize ESS access.

🔹 **Steps:**

1. Proxy as employee (Larry Ye) → Check current permissions.
2. Go to **Manage Permission Roles** → Edit Employee Self-Service role.
3. Adjust field-level permissions:

|  |
| --- |
| Block Field(s) Permission Change? |

|  |  |  |  |
| --- | --- | --- | --- |
| National ID | All | View & Edit | ✅ Yes |
| Contact Information | Email, Phone, Social Accounts | View & Edit | ✅ Yes |
| Contact Information | Business Email | View only | ✅ Yes |
| Personal Information | First Name, Last Name, Gender, Marital Status | View Current/History only (remove Edit/Insert) | ✅ Yes |

1. Save changes.
2. Proxy as Larry Ye again → Verify if permissions match requirements.

## 5. ****Best Practices & Warnings****

1. **Do not** give Edit/Insert permission on block actions → employees could bypass workflows.
2. **Delete & Correct permissions** → reserved for admins.
3. Always test changes by **proxying as an employee/manager**.

# 🔹 Key Takeaways (Summary)

1. **ESS** = employees manage **their own info** (target pop = themselves).
2. **MSS** = managers manage **their direct reports** (job, salary, transfers).
3. Permissions are controlled at **field level** in RBP.
4. Use workflows as guardrails to prevent unauthorized updates.
5. Always verify permissions by proxying as end-users.

Would you like me to also make a **side-by-side comparison table of ESS vs MSS permissions** (what employees can typically do vs what managers can do) so you can revise quickly?

# **Using manager self-service in SAP SuccessFactors Employee Central**

Perfect, let’s break this one down in **detail** (so you truly get what Manager Self-Service (MSS) means in SuccessFactors), and then I’ll give you a **summary with important points** at the end.

### 🌐 What is Manager Self-Service (MSS)?

1. **Employee Self-Service (ESS)** = Employees update their own info (address, contact, marital status, etc.).
2. **Manager Self-Service (MSS)** = Managers perform HR-related tasks for their **direct reports** (team members), like promotions, salary changes, or transfers.

Think of it like: 👉 ESS = "I manage my own stuff." 👉 MSS = "I manage my team’s stuff."

### ⚙️ Manager Self-Service Permissions

To control what managers can do, we configure **Role-Based Permissions (RBP)**. Permissions make sure managers only see/edit what they are allowed to.

**How permissions are set for MSS (example: Job Information):**

1. **Enable visibility**
2. In Employee Views (People Profile), make sure the section (e.g., Job Information block) is visible to the manager.
3. **Allow viewing**
4. Give "View Current" or "View History" permissions → this lets managers see employee’s job info history.
5. **Allow editing**
6. To enable the little pencil ✏️ icon, grant "Edit/Insert" for the field or block → this allows changes.
7. **Restrict workflows correctly**
8. Managers should not bypass approval workflows.
9. So avoid giving them **Insert New Record in History**, **Correct**, or **Delete** permissions (these are for HR Admins only).

### 🖥️ How Managers Use MSS

1. Managers start with the **Take Action / Actions button** in the employee’s profile (or quick card).
2. From there, they can:
3. Update Job Information (e.g., promotion, transfer)
4. Update Compensation Information (e.g., salary raise)
5. Update Job Relationships (e.g., change manager, add mentor, etc.)

These actions trigger **workflows** (like HR approval) so managers don’t have full unchecked power.

### 📝 Exercise Example (ACE Corp case)

**ACE Corp’s requirement:**

1. Managers can view and edit **Job Info, Compensation Info, Job Relationships**,
2. But they should **NOT** be able to "Insert New Records" in history (to prevent bypassing approval).

**Steps they take:**

1. Proxy as Carla (a manager) → test current permissions (she could insert new records).
2. Edit Manager Role permissions → remove "Edit/Insert" for those blocks under Effective Dated Entities.
3. Save and test again → now Carla can still view & edit, but **no Insert New Record option**.

## ✅ Summary – Key Points

1. **MSS = Managers perform HR tasks for their team members (direct reports).**
2. Permissions are controlled through **RBP (Role-Based Permissions).**
3. Key configuration:
4. View Current/History → allows seeing employee data.
5. Edit/Insert (field-level) → allows editing, but avoid giving full block-level Insert to prevent bypassing workflows.
6. Delete/Correct → reserved only for Admins.
7. Managers initiate changes through the **Take Action button** in an employee’s profile.
8. **Best practice** = Always ensure workflows (approvals) are respected, so managers can’t make unchecked changes.

👉 Do you want me to also make a **side-by-side comparison table of ESS vs MSS**? It will help you clearly see the difference since both are tied together in SuccessFactors.

# **Configuring Workflows in SAP SuccessFactors Employee Central**

Configuring Workflows in SAP SuccessFactors Employee Central Objective

After completing this lesson, you will be able to configure Workflows in SAP SuccessFactors Employee Central Workflow administration

Workflows are typically configured as part of the self-service process. While employees and managers are responsible for keeping their data accurate, the HR Operations team plays a key role in reviewing and approving these changes.

When an employee or manager submits a change, a workflow is typically activated. Workflows are built in the implementation process. The role of the administrator is to ensure the completion of workflows and to manage the workflow participants.

In the figure, Example: Workflow Approval Steps, you can see a sample workflow with two approvers after the manager initiates the change. Although there is no set number of approvers that could be added to a workflow, you need to consider what is enough to meet your business requirement without taking too much time.

Workflow Configuration

Workflow is an XML-based Foundation Object. It is a Foundation Object generally categorized as Others, and just like any other XML-based Foundation Object, workflow records are managed in Manage Organization, Pay and Job Structures tool.

In the figure, Workflow Configuration, you can see the workflow record for an Address Change. There is one approver, the Dynamic Group Talent Approval, and two external e-mail addresses that will be cc’d when the process is finalized.

Types of Workflow Participants

By default, there are three types of workflow participants:

Approvers: An approver actively participates in the workflow. An approver is required to move the request along by either approving or denying (which sends the request back) the request. Approvers can also post comments to the workflow. Contributors: A contributor is a type of participant that can only add comments to the workflow. They do not actively approve nor deny the request. Contributors also get notified of any progress. CC Role: This is a passive participant. CC Roles get notified upon the completion of the request. Complete the interaction to learn more about setting workflow participants.

Workflow Administration

Dynamic roles and groups A dynamic role is a flexible way to assign users and groups as workflow approvers based on the job information of the subject user.

For example, you can create a dynamic role identifying Janet James as the approver for transactions using promotion as the event reason for employees in Corporate Industries. If Carla Grant promotes Marcus within the Corporate Industries group and the promotion event reason is used, the system routes the approval to Janet James.

To create Dynamic Role records, useManage Organization, Pay and Job Structures in Admin Center.

When a dynamic group is used on a workflow, the request is sent to all group members. However, only one of the members is expected to act on the request.

The groups are created using the same interface as RBP. Dynamic groups are managed using the Manage Workflow Groups tool.

Four-Eye Principle You can enable the Enforce Four-Eyes Principle On Workflow Step Approval in the Platform Feature Settings that enforces a security mechanism so that the initiator cannot be an approver for the workflows using Dynamic Groups and Dynamic Roles.

The logic uses person-based ensuring that employees cannot approve requests they initiated, regardless of which employment is used for submission or approval.

Workflow Notification

Standard workflow e-mail templates can be found in E-Mail Notification Template Settings. Though the standard templates can be modified, you cannot customize the notification for each workflow participant. You'll have to use Document Generation to create a fully customized template where each participant receives a custom notification.

Workflow e-mail templates use tags, as shown in the figure, Workflow Notification. See the Workflow Implementation guide for a full list of the supported tags.

Standard workflow e-mail templates are selected by default and cannot be disabled. They are available for the following workflow actions:

Approval

Rejected

Pending

Canceled

Skipped

Posted

Lock Down

Unlock

Contributor

CC Role

Approved

Sent back

Approver skip The system provides a sophisticated logic to skip the same single approvers in consecutive steps of the workflow to ensure improved processing efficiency without compromising data quality and legal compliance.

All the successive workflow steps with the same single approver, except the last one, will be skipped automatically. The skipped steps are displayed on the Workflow Details page. All skipped steps are indicated in the Activity area of the page.

By taking steps out of long approval chains, the skip option improves the efficiency of processing workflows without affecting data quality. An example is demonstrated in the following table.

Skip logic Steps: Original Approvers Skipped? Explanation Step 1: User 1 Yes Has the same single approver as Step 2. Step 2: User 1 Yes Has the same single approver as Step 3. Step 3: User 1 No Step 4 has a different approver. Step 4: User 2 Yes Has the same single approver as Step 5. Step 5: User 2 No Step 6 has multiple approvers, even though one of them is the same approver as Step 5 (User 2). Step 6: User 1, User 2 No Though it has exactly the same approvers as Step 7, it's not skipped because we only skip steps with a single approver. Step 7: User 1, User 2 No Has multiple approvers. Step 8: User 2 Yes Has the same single approver as Step 9. Step 9: User 2 No This is the last step, without the following step. Enabling the Skip option The option to skip approvers is enabled in Company System and Logo Settings.

Approver Replacement Approver replacement ensures that an employee who is the subject user of a workflow cannot serve as a step approver. Instead, the system automatically assigns their manager as the step approver.

The logic uses person-based; if the approver is the same person as the workflow subject user, this person will be replaced by the manager of the approver's employment. This logic applies to:

Contributor roles and CC roles, who'll be replaced when they happen to be the same person as the subject user. Delegation scenarios, where it will prevent the person who's the subject user of a workflow from being a delegatee. However, it does not support certain scenarios, such as approvers added or updated in Manage Workflow Requests, workflows for the Position MDF object, workflows escalated, or workflows having escalation or delegation revoked.

Workflow participation Employees can track, access and handle workflow requests all in the home page. The Approvals section in the homepage gives easy access to requests requiring their approval. The View Pending Workflows in the quick action card in the home page gives users immediate access to requests that require their attention. These requests are organized into six categories on the Pending Workflows page. The Access requests awaiting my approval link, allows users to easily navigate to all requests requiring your action.

Select the View Pending Workflows card to open the Pending Workflows page My Requests for Approval: This category includes requests that the user has submitted and are currently awaiting approval from others. Users can see who is expected to approve each request. My Requests Sent Back: This category includes requests that the user has submitted but have been sent back for further action. Users can update and resubmit these requests. Pending Requests That I Approved: This category includes requests that the user has already approved and are now awaiting approval from others. Users can see who currently has the request. Requests Reassigned to Others: This category includes delegated and escalated requests. Requests for Comment: This category includes requests where the user has been added as a contributor, with the role of providing comments to facilitate processing. Requests for Information: This category includes requests where the user has been added as a CC role, allowing them to stay informed and follow up on completed workflows. Approving Requests You can approve requests in multiple ways:

Approvals Card To-do Panel Use the link Access requests awaiting my approval from View Pending Workflows If you do not want the users to use the quick approval option, disable the permission in RBP → Manage Workflows

Use the interaction below to learn how requests are approved.

Note

You can have additional filtering options in the My Workflow Request tool when you enable the permission, Manage Workflows → Professional Edition Manage Workflow Requests, in Role-Based Permissions.

Ownership of workflows The Assign to me workflow feature allows a user that belongs to a dynamic group to take ownership of the request and assign the workflow to themselves. It allows a user to find out who assigned the workflow as well as remove the assignment from themselves or other members of the dynamic group.

How to Use the Assign to Me Function?

Before you use the assign to me function, a user must have the Manage Workflow Assignments permission assigned to them. When the permission is set up, a user can review the pending requests. As a user in a dynamic group (workflow group), a user can look at any workflow assigned to that dynamic group and assign it to themselves.

A user can also filter the workflow requests in My Workflow Requests based upon the assignment.

Benefits of Assign to Me Multiple users can process the same workflow in parallel. For example, if a workflow requires additional alignment and communication, such as a workflow that has to go through a worker’s council hearing, and there’s no indication that the workflow is already in progress, another user could start to process it. This function indicates when a workflow is in progress and increases the efficiency of the team that processes the workflow.

Exercise: Customize a new hire workflow Business Example ACE Corporation wants to customize the existing new hire workflow to include a Dynamic Group of HR representatives. You will create the new dynamic group, update the workflow record, and finally validate if the changes are functional.

Note

You must have completed Prepare an Instance (Unit 1) and Prepare the Data Models (Unit 2) exercises before completing this hands-on. This exercise activity is not required for completing succeeding hands-on exercises for this course.

Watch the video to learn how to change the workflow.

Task 1: Create a Dynamic Group Steps Go to Manage Workflow Groups to create a Dynamic Group that will be used as a hiring approver. Use the information in the table to define the group.

Dynamic Group Requirements Group Name HR People Pool Anyone with Job Code including HR Log in to your instance.

Navigate to Manage Workflow Groups.

Select Create New Group.

Use the information in the table, Customer Requirements, to define the group.

Select Update in the Group Membership bubble.

Select the new number that is populated in the Group Membership bubble.

Verify Alex Anderson is an employee in the Dynamic Group.

Select Close → Done.

Task 2: Update an existing workflow Steps Go to Manage Organization, Pay and Job Structure to update the existing New Hire Workflow. Use the information in the table to define the new approvers.

Customer Requirements Approver 1 (Step 1) Approver Type Dynamic Group Approver Role HR All other attributes remain the same. Approver 2 (Step 2) Approver Type Role Approver Role Manager Context Target All other attributes remain the same. Approver 3 (Step 3) Approver Type Role Approver Role Manager Manager Context Target All other attributes remain the same. As an administrator, navigate to Manage Organization, Pay and Job Structure .

Choose Workflow Configuration → Hire (New or Rehire) (HIRE) → Take Action → Make Correction .

Update the Workflow using the information in the table, Custom Requirements.

Select Save.

Task 3: Test the Workflow Steps Test the New Hire Workflow. Go to Add New employee to test if the new approvers will appear in the workflow. Use the table to create a new user.

New Hire Information Field Values Hire Date Today's date Company Ace USA Event Reason New Hire Name Gillian Ray Date of Birth August 22, 1982 Email Manager/Supervisor Carla Grant Job Classification Analyst HR Manager Nancy Nash As an administrator, navigate to Add New Employee .

Hire in the employee using the information provided in the table, New Hire Information. Include any value for required fields in Job Information.

Select Submit.

Does your new workflow trigger properly? The workflow should indicate the three-step approval (HR, Carla Grant, Alexander Thompson).

Select Confirm.

Proxy as Alex Anderson.

On the home page, select Approve Card.

Locate the request for Gillian Ray → Approve .

Configuration of delegation

With Is Delegate Supported feature, you can enable approvers to delegate the workflow to another user in the company. The delegate can then take over the workflow to approve or decline on behalf of the original approver. The delegate also has the option to refuse the delegation. The original approver can also recall the workflow.

There are two options on how to delegate workflows:

Manual delegation: Approvers can identify the delegate at each workflow step. Auto delegation: Users can identify delegates for different requests or a single delegate for all requests in the Homepage → Delegate My Workflows . Delegation is configured in the Corporate Data Model. The Workflow Configuration foundation object has a field called is-delegate-supported. When Corporate Data is configured with the is-delegate-supported hris-field under the wfConfig hris-element, the system allows the admin user to configure a workflow record with Yes and No options. By default, the field value is No.

Corporate Data Model: hris-field under

Code Snippet

Copy code

Switch to dark mode

Is Delegate Supported For both manual and auto delegation, it is necessary that delegation is supported at the workflow record, meaning Is Delegate Supported is set to Yes.

Note

The delegation feature uses the four-eye principle, preventing the person submitting the request from being appointed as a delegatee for it. Activation of auto delegation

A user can set up an auto delegate through quick actions on the homepage. To enable auto delegation, the user needs to have the RBP permission, Allow Auto-Delegation. When auto delegation is enabled, all workflows with Is Delegate Supported set to yes are routed to the nominated user. When you assign a delegate, you can specify the start and end times for the auto-delegation. If they leave those fields blank, the auto-delegation is indefinite until manually turned off. This includes workflows received through job relationships, dynamic roles, dynamic groups, and positions. If you enable the Company System and Logo Settings → Allow delegatees to accept or reject a workflow delegation request option, the delegate has the option to approve or reject the delegation. A delegate can also view their delegations and delegation periods under the Delegation Requests for Me tab.

Workflow Auto-Delegation by Groups Workflow auto-delegation by groups feature will allow approvers to assign different delegates for a subset of request types. For example, a user may want to delegate their manager for termination, change in compensation and promotion requests, and delegate a subordinate for all other requests.

Administrators can group related requests in Manage Data → Auto Delegate Group. Workflows can be grouped by request types or objects.

Administrators can also setup auto-delegation on behalf of employees in Manage Data → Auto Delegate Config.

The system automatically creates a ALL OTHERS when at least one group is created. This can be used as a catch-all delegate.

Once the groups are created, a user can choose to identify a single delegate for all requests or use delegate by workflow group provided they do not exceed three delegates.

Future-dated alternate workflow You can use an alternate workflow to include more approvers in a workflow process and take care of potential conflicts caused by future-dated records.

In the figure, Alternate Workflow, an address change would normally go to the Dynamic group, Talent Approval. However, if a future-dated record is identified, the system will instead trigger the alternate workflow, Data Change.

For example, Marcus Hoff has a future-dated address record effective December 15, 2099. Today, a request to change the zip code was submitted.

In the figure, Request Submission, you can see how the approval steps differ using the alternate workflow, Data Change, because of the future-dated record.

Note

A business rule could be used instead of alternate workflows. Reminders for approvers about stalled workflows

You can specify that the current workflow approver is reminded to take action on a pending workflow after a certain number of days. You can configure the notification in two ways:

Set up the same number of days in all workflows.

Set up the individual number of days for different workflow records.

To configure reminders, create the job type Workflow Action Reminder in Scheduled Job Manager. You can set the Remind in Days value to the number of days for all workflows or leave the value blank and specify the days at the worflow level.

If you are configuring the individual workflow configuration records, you must update the Corporate Data Model to include the remind-indays hris-field in the wfconfig hris-element as follows:

Code Snippet

Copy code

Switch to dark mode Remind in Days When the scheduled job runs, the system gets all the pending workflows. The number of days is determined based upon either:

The number of days entered in the scheduled job. The number of days the Admin has entered for each workflow foundation object record if the number of days is empty in the scheduled job. If the workflow has been pending for that number of days, the reminder notifications are sent to the current approver.

The reminder notification reuses the approver's original notification when a workflow is triggered, with "Reminder:" in the e-mail subject line. There is no need to configure a specific e-mail template for reminder notifications.

Note

If you configure a number of days in the notification job, values entered on Workflow Configuration Records are ignored.

Auto escalation of workflows

It is possible to define an escalation path for a workflow. If an approver takes no action on the workflow, the workflow becomes stalled. With auto escalation, the workflow is automatically escalated to a specified user if the workflow is stalled for a specified number of days. The new approver can decline the escalation, returning to the previous approver. The previous approver can also revoke the escalation, thus bringing it back to themselves. After declining or revoking, the escalation would continue with the next escalation step after the defined number of days.

An escalation path must be created within the Manage Data tool, then attached to the workflow configuration record.

Configuration of Workflow Escalation

Steps to configure the escalation:

You must first add the escalation to the Foundation Object in the Corporate Data Model. Include this xml tag in the corporate data model under <hris-element="wfConfig"> : Code Snippet

Copy code

Switch to dark mode

Escalation Create the escalation path in Manage Data. Assign the required workflows to the escalation records. Create and run the Workflow Auto Escalation Job Type in Scheduled Job Manager. Escalation will not happen if you have enabled the auto-approval feature. Auto approval of Workflows Auto Approval

Normally, a workflow is prevented from proceeding to the next step if the current step's approver does not take action. As a result, all subsequent approvers must wait until the workflow reaches their assigned step. It is possible to create a recurring job for automatic approval of stalled workflows, to make the system automatically check and approve workflow steps that have not been processed within a specified timeframe. To prevent workflows from stalling at a certain approval step, you can specify whether a workflow step is to be automatically approved when the approvers haven't responded within a certain number of days.

Configuration of Auto Approval of Workflows

To use the auto-approval, you must include this XML tag in the corporate data model under <hris-element="wfStepApprover">.

Code Snippet

Copy code

Switch to dark mode Days until Auto Approval The second step is to create a recurring job that automatically checks and approves steps of stalled workflows. In Provisioning, go to Managing Job Scheduler > Manage Scheduled Jobs and start creating a new job. As the job type, select Workflow Auto Approval and complete the job fields.

We recommend running this job daily, defining an active period for the recurring job, or entering an infinite future date.

The third step to enable this feature is to define the "Days Until Auto Approval" in your workflow configuration record approval step by entering a number in the field. This number specifies how many days elapse before this recurring job prompts the system to auto-approve a non-responsive step. As a result of this configuration, when a workflow step has not been responded to within the predefined timeframe, the system automatically approves it. It allows the workflow to proceed to the subsequent steps.

Additional Resources For more comprehensive information on workflows, go to the Workflows Implementation Guide in the SAP Help Portal.

Summary: Here are the key takeaways from the lesson summarized in a short bulleted list:

Workflows are the approval mechanism used in Employee Central Workflow participants are categorized as approvers, contributors and CC roles Workflow participants could be assigned using a standard hierarchical role, dynamic group, dynamic role or position-related information Workflows can be delegated, escalated or auto-approved

**Configuring Alerts & Notifications in Employee Central**

Perfect 👍 You pasted the **Alerts & Notifications** lesson. Let’s go through it **step by step in detail first**, then I’ll give you a **short exam-friendly summary** at the end.

# 🔹 Configuring Alerts & Notifications in Employee Central

## 1. ****What are Alerts?****

1. **Alerts** = system-generated reminders or warnings to notify users about important events.
2. Example: “Work visa is about to expire,” “Compensation change effective next week,” etc.
3. Alerts can show **inside SuccessFactors** or be sent via **email** (based on setup).

**Supported entities (places where alerts can be used):**

1. Employee Central data (like Employment Info, Job Info, Compensation Info).
2. Pay Component Recurring & Non-Recurring.
3. Work Permit.
4. Global Assignment.
5. MDF Data (Custom objects).

## 2. ****Three Key Elements of an Alert****

### ✅ a) Alert Message

1. A text message shown to the user.
2. Comes from a **pre-delivered object: Alert Message**.
3. Message length = default **255 characters** (can increase to 4000).
4. Can use **tags (placeholders)** to make the alert dynamic:
5. [[SUBJECT\_USER]] → name of employee.
6. [[EVENT\_REASON]] → event reason (hire, promotion, termination).
7. [[EFFECTIVE\_DATE]] → date when change takes effect.
8. [[OBJECT\_TYPE]] & [[OBJECT\_NAME]] → used for MDF data.
9. [[VIEW\_BLOCK\_ON\_PROFILE]] → deep link to People Profile (takes user directly to that section).

### ✅ b) Alert Recipient

1. Who gets the alert?
2. Recipients are defined in **workflow records**.
3. **Approvers** → receive alerts inside the system.
4. **CC roles** → receive alerts by **email only**.
5. **Contributors** → not used in alerts.

### ✅ c) Alert Rule

1. Rules define **when** and **why** the alert should be triggered.
2. Rule type: **Generate Alerts (EC Core Rule Scenario)**.
3. Steps:
4. **IF** condition → e.g., IF Work Permit Expiry Date = 30 days from today.
5. **THEN** actions →
6. Assign Workflow (recipients).
7. Assign Effective Date.
8. Assign Alert Message.
9. Where rules are assigned:
10. **EC entities** → saved at element level (e.g., Work Permit block).
11. **MDF objects** → use Alert Purpose in Rules for MDF Objects, assigned as Post Save Rule.

## 3. ****Sending Alerts****

1. Config requires a **Provisioning job**:
2. Job runs on a schedule (daily, weekly, etc.).
3. Job checks conditions and sends alerts.
4. Example: Each night, the job scans for upcoming visa expiry dates and sends alerts to HR.

## 4. ****Managing Alerts****

1. Use **Manage Alerts and Notifications Dashboard**:
2. Filter, view, and delete pending alerts.
3. Can also manage To-Dos related to alerts.
4. Useful for admins to clean up or troubleshoot alerts.

# ✅ Summary (Exam/Interview Friendly)

1. **Alerts** = automatic notifications of important events in Employee Central.
2. **Three critical elements**:
3. **Alert Message** (text with tags like [[SUBJECT\_USER]], [[EFFECTIVE\_DATE]]).
4. **Alert Recipient** (approvers see in system, CC roles get email).
5. **Alert Rule** (IF–THEN condition to trigger alert).
6. Rules are created with **Generate Alerts** (for EC data) or **Alert Purpose in Rules for MDF Objects**.
7. A **Provisioning job** must run to process and send alerts.
8. Admins manage alerts in **Manage Alerts and Notifications Dashboard**.

👉 Do you want me to also show you a **real-world example configuration** (like “Visa Expiry Alert for Employee” with IF/THEN conditions and recipient setup) so you’ll know how to do it practically, not just theory?

# **Creating Event Reasons in SAP SuccessFactos Employee Central**

Great — this is an important topic because **Events & Event Reasons** are at the heart of how SAP SuccessFactors tracks changes in an employee’s lifecycle. Let’s break it down in detail first (with examples), then I’ll give you a crisp exam-friendly **summary at the end**.

# 🔹 Creating Event Reasons in SAP SuccessFactors Employee Central

## 1. ****What are Events?****

1. **Events** = Major actions in the employee lifecycle.
2. Examples: Hire, Promotion, Transfer, Termination, Data Change.
3. Delivered by SuccessFactors as a **standard picklist** (cannot create new ones).
4. You can **deactivate** or **rename (relabel)** events, but not add custom ones.

## 2. ****What are Event Reasons?****

1. **Event Reason** = The **specific reason** behind an Event.
2. Example:
3. Event = Promotion
4. Event Reason = Lateral promotion (no salary change) OR Vertical promotion (with salary increase).
5. Event Reasons are **Foundation Objects (XML-based)** → managed in Manage Organization, Pay and Job Structures.
6. Every **Job Information** or **Compensation Information** change **requires both**: Event + Event Reason.
7. Event Reason also determines **employee status** (Active, Terminated, Leave, etc.).

## 3. ****Why Event Reasons are important****

1. Ensure **clear reporting** (you can later run reports like “How many terminations due to resignation vs retirement”).
2. Help with **legal compliance** (some countries require accurate tracking of reasons).
3. Ensure workflows trigger correctly (e.g., HR approval for a salary increase).

## 4. ****Event Reason Derivation (ERD)****

Two options:

1. **Without ERD** (Manual):
2. Manager/Admin manually selects Event + Event Reason when making changes.
3. Problems → Error-prone, inconsistent, unreliable reports.
4. **With ERD** (Preferred, Automatic):
5. System automatically derives the correct Event Reason based on **Business Rules**.
6. Example:
7. IF Job Title changes → Event Reason = Job Title Change.
8. IF Location changes → Event Reason = Location Transfer.
9. Advantages → More accurate, standardized, better reporting.
10. Limitation → Cannot be used for **Hire, Rehire, Termination** (must always be manual).

⚠️ If no rule sets the event reason → system throws an error.

## 5. ****Bypassing ERD****

1. If a user has **Insert New Record** access in **History** of Job Info / Comp Info blocks →
2. They can **manually select** Event + Event Reason.
3. No workflow triggered.
4. This is called an **HR Edit** (usually reserved for admins only).
5. If change is made via **Take Action** button or Pencil icon → ERD applies, and workflow triggers normally.

## 6. ****Event Reason on Imports****

1. If **event reason is filled** in the import template → system uses that.
2. If **left blank** → system uses the ERD rule (onSave).
3. To allow this, enable: **Enable Business Rules for selected entities’ permission for imports**.

## 7. ****Country-Specific Event Reasons****

1. For global companies, event reasons may differ per country.
2. You can configure system to show **only relevant event reasons** based on employee’s **legal entity or country**.
3. Config steps:
4. Modify Country/Region object → add composite association with Event Reason Wrapper.
5. In Manage Data → assign country-specific event reasons.

## 8. ****Creating Event Reason & Workflow (Exercise Example)****

**Task 1: Create Event Reason**

1. Go to Manage Organization, Pay and Job Structures.
2. Create → Event Reason.
3. Example:
4. Effective Date: 01/01/1990
5. Event ID: JOBINFOCHANGE
6. Event Name: Job Info Change
7. Status: Active
8. Event: Data Change

**Task 2: Create Workflow**

1. Workflow ID: JOBCHANGEWKFLW
2. Workflow Name: Job Info Change Workflow
3. Approver 1: Employee’s Manager’s Manager
4. Approver 2: HR
5. Contributor: Employee’s Manager
6. CC Role: Carla Grant

# ✅ Summary (Exam-Friendly)

1. **Event** = Standard system lifecycle action (Hire, Termination, Promotion). Cannot add new ones.
2. **Event Reason** = Specific reason for the event (e.g., Promotion → Lateral vs Vertical). Always required for Job/Comp Info changes.
3. **Event Reason Derivation (ERD)** → Business Rules automatically assign Event + Reason → ensures accuracy & reporting. Cannot be used for Hire, Rehire, Termination.
4. **Manual Bypass** → If user uses History → Insert New Record, they must pick Event + Reason manually (workflow not triggered).
5. **Imports** → If Event Reason field filled, system uses that; if empty, system derives from rule.
6. **Country-Specific Reasons** → Configure so users only see relevant reasons for their country/legal entity.

👉 Do you want me to also show you **common exam-style questions** from this topic (like MCQs / scenarios) so you can practice right away?