HR809

SAP SuccessFactors Employee Central Payroll Project Team Orientation

PARTICIPANT HANDBOOK
INSTRUCTOR-LED TRAINING

Course Version: 2605
Course Duration: 2 Hours 40 Minutes

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	*Example text*
Window title	*Example text*

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Contents

vii	Course Overview	
1	Unit 1:	Introducing the Project Team Orientation (PTO)
3		Lesson: Describing the PTO
5		Lesson: Managing Data Protection and Privacy
7	Unit 2:	Introducing SAP SuccessFactors Employee Central Payroll
9		Lesson: Exploring SAP SuccessFactors HCM Suite
11		Lesson: Describing SAP SuccessFactors Employee Central Payroll
13	Unit 3:	Exploring SAP SuccessFactors Employee Central Payroll
15		Lesson: Accessing Regulatory Change Manager Application
21		Lesson: Accessing the localization Work Zone Groups for Payroll
23		Lesson: Setting up Security
29		Lesson: Reviewing the Decisions Checklist for Setting up Security
31	Unit 4:	Managing Employee Data
33		Lesson: Accessing Employee Data
41		Lesson: Adding New Employee
45		Lesson: Navigating to Payroll-Specific Information
51		Lesson: Reviewing the Decisions Checklist for Navigating Payroll-Specific Information
53	Unit 5:	Processing Payroll
55		Lesson: Describing Payroll Activities
59		Lesson: Managing Payroll Alerts
67		Lesson: Reviewing the Decisions Checklist for Managing Payroll
69	Unit 6:	Exploring Post-Payroll Integration
71		Lesson: Describing Post-Payroll Integration Process
75		Lesson: Reviewing the Decisions Checklist for Exploring Post-Payroll Integration
77	Unit 7:	Planning Next Steps
79		Lesson: Reviewing Next Steps
81	Glossary	

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Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

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UNIT 1 Introducing the Project Team Orientation (PTO)

Lesson 1

Describing the PTO 3

Lesson 2

Managing Data Protection and Privacy 5

UNIT OBJECTIVES

- Define the purpose and goals of the PTO.
- Locate Data Protection and Privacy resources.

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Unit 1
Lesson 1

Describing the PTO

LESSON OBJECTIVES
After completing this lesson, you will be able to:

- Define the purpose and goals of the PTO.

SAP SuccessFactors Project Team Orientation

Welcome to the SAP SuccessFactors Project Team Orientation (PTO). This orientation is designed for the major organizational stakeholders responsible for implementing and maintaining SAP SuccessFactors applications. Stakeholders may include but are not limited to, roles such as Executive Stakeholders, Business Process Owners, Project Managers, Administrators, and Business Users.

The overall goal of the PTO is to provide a knowledge transfer on core out-of-the-box functionality that will enable you to gain a high-level understanding of product concepts and capabilities.

Using this guide, you will learn key elements and decision points regarding using these tools so your organization can work with SAP SuccessFactors implementation consultants to plan and implement an effective configuration.

Summary

- The PTO helps to identify critical decision points for planning and configuration.
- Essential knowledge is provided during the PTO that helps teams collaborate on a tailored and effective system implementation.

LESSON SUMMARY
You should now be able to:

- Define the purpose and goals of the PTO.

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Unit 1
Lesson 2

Managing Data Protection and Privacy

LESSON OBJECTIVES
After completing this lesson, you will be able to:

- Locate Data Protection and Privacy resources.

Data Protection and Privacy Features

Various data protection and privacy features have been made available to our customers.

The data protection and privacy features include, for instance, the ability to report on employee personal data and personal data changes in the application.

Customers will also have options to configure data retention rules at the country level for active and inactive employees that will permanently purge personal data from SAP SuccessFactors applications.

It is the customer's responsibility to adopt the features that they deem appropriate. More information can be found in the Implementing and Managing Data Protection and Privacy guide.

Summary

- SAP SuccessFactors provides a number of enhanced data protection and privacy features.
- Customers are responsible for adopting the features that they deem appropriate for their organization to use.

LESSON SUMMARY
You should now be able to:

- Locate Data Protection and Privacy resources.

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UNIT 2 Introducing SAP SuccessFactors Employee Central Payroll

Lesson 1

Exploring SAP SuccessFactors HCM Suite 9

Lesson 2

Describing SAP SuccessFactors Employee Central Payroll 11

UNIT OBJECTIVES

- Review the SAP SuccessFactors HCM Suite.
- Describe SAP SuccessFactors Employee Central Payroll.

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Unit 2
Lesson 1

Exploring SAP SuccessFactors HCM Suite

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Review the SAP SuccessFactors HCM Suite.

SAP SuccessFactors HCM Overview

SAP SuccessFactors Human Capital Management (HCM) is a suite of cloud-based HCM software applications that supports Core HR and Payroll, Talent Management, and HR Analytics and Reporting solutions to help drive your business forward.

SAP understands that everything about work is changing. That's why SAP SuccessFactors HCM enables you to put your people at the center of everything – with AI-enabled solutions designed to meet individual needs and drive organizational agility at scale.

SAP SuccessFactors HCM Suite includes cloud-based solutions comprised of these areas:

- Core HR and Payroll – including a powerful HR information system, time and attendance, and more
- Talent Management – including solutions for recruiting, performance management, and more
- HR Analytics and Reporting – including Story reporting, Workforce Analytics, and more

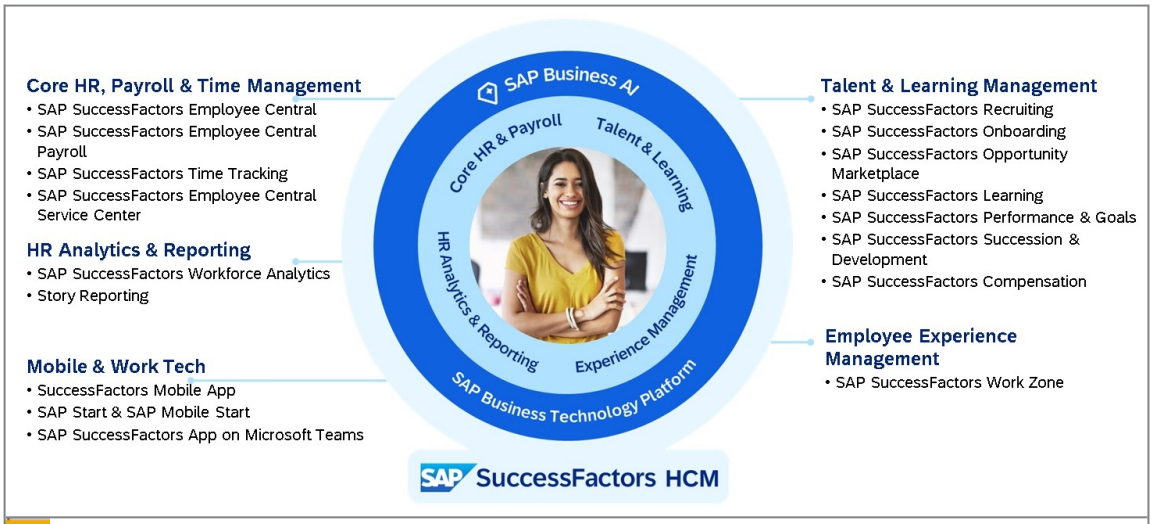

Figure 1: Human Capital Management Diagram

Summary

- SAP SuccessFactors HCM helps companies put people at the center of everything.

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- SAP SuccessFactors Human Capital Management (HCM) is a suite of cloud-based HCM software applications.
- SAP SuccessFactors HCM supports Core HR and Payroll, Talent Management, and HR Analytics and Reporting solutions.

LESSON SUMMARY

You should now be able to:

- Review the SAP SuccessFactors HCM Suite.

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Unit 2
Lesson 2

Describing SAP SuccessFactors Employee Central Payroll

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe SAP SuccessFactors Employee Central Payroll.

Introduction to SAP SuccessFactors Employee Central Payroll

SAP SuccessFactors Employee Central Payroll helps organizations manage their most important resource: employees. Engage and empower your entire workforce, including Payroll, Human Resources, managers, and employees.

This application is created with the end user in mind, allowing organizations to provide employees with an intuitive user experience to view their pay statements and maintain data relevant to payroll, such as bank accounts. The Payroll department can consistently pay all employees easily and accurately regardless of the complexity of the company's pay policies. Payroll is automatically alerted to all discrepancies and policy deviations and given all the information necessary to make an informed decision on what needs to be done.

SAP SuccessFactors Employee Central Payroll allows organizations to meet complex payroll requirements.

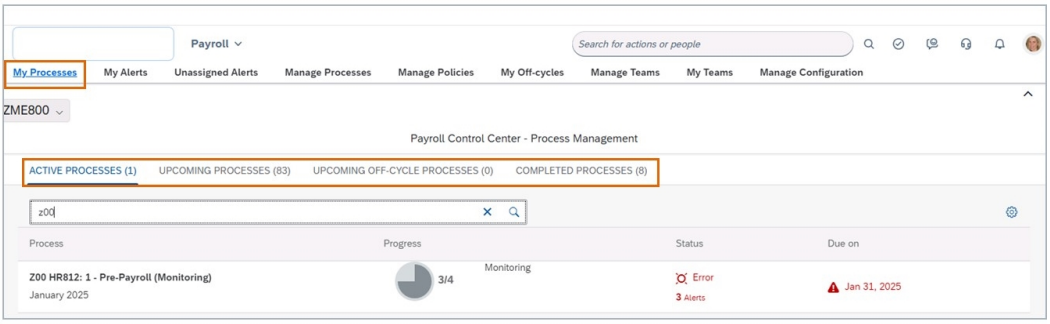

Figure 2: Payroll Control Center: Process Management

Summary

SAP SuccessFactors Employee Central Payroll description:

- Manages employees efficiently: SAP SuccessFactors Employee Central Payroll helps organizations manage their workforce.
- Intuitive user experience: Allows employees to view pay statements and maintain payroll data easily.

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- Accurate and easy payments: Enables Payroll to pay all employees accurately, despite complex pay policies.
- Automatic discrepancy alerts: Notifies Payroll of any discrepancies or policy deviations with necessary information.
- Meets complex payroll needs: Supports organizations in meeting intricate payroll requirements.

LESSON SUMMARY

You should now be able to:

- Describe SAP SuccessFactors Employee Central Payroll.

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UNIT 3 Exploring SAP SuccessFactors Employee Central Payroll

Lesson 1

Accessing Regulatory Change Manager Application 15

Lesson 2

Accessing the localization Work Zone Groups for Payroll 21

Lesson 3

Setting up Security 23

Lesson 4

Reviewing the Decisions Checklist for Setting up Security 29

UNIT OBJECTIVES

- Describe the purpose of Regulatory Change Manager Application.
- Describe the purpose of the localization Work Zone Groups for Payroll
- Identify payroll-specific Role-Based Permissions.
- Review the decisions to be made about security before implementation.

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Unit 3
Lesson 1

Accessing Regulatory Change Manager Application

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe the purpose of Regulatory Change Manager Application.

Regulatory Change Manager

Customers must stay informed about relevant legal changes in Employee Central Payroll. The Regulatory Change Manager application enables you to filter and search for all legal updates that may impact your organization. For more information, please visit the Regulatory Change Manager.

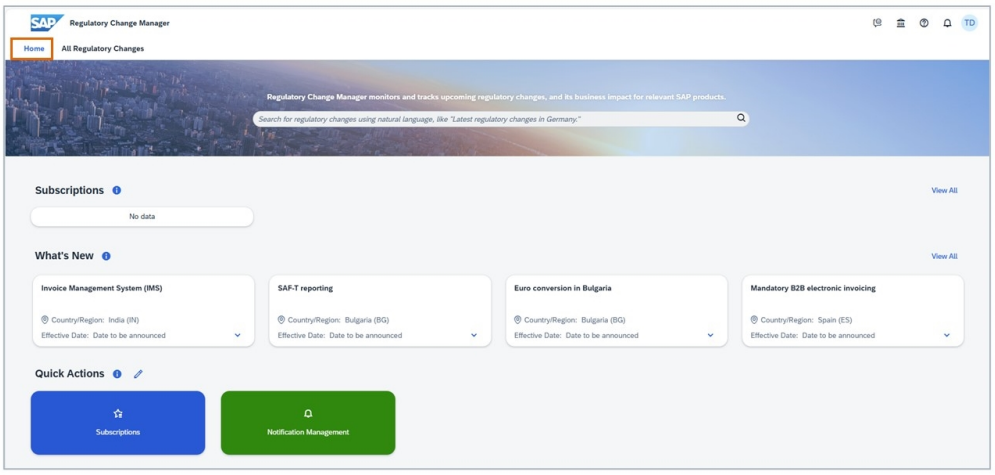

Figure 3: Regulatory Change Manager: Home Page

The *Analysis Center* visually represents information regarding regulatory changes for a selected product within a specified period or country.

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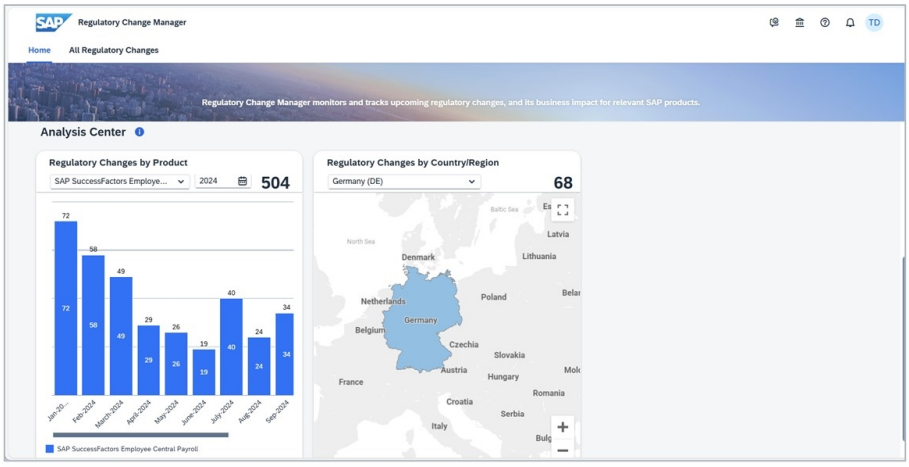

Figure 4: Regulatory Change Manager: Analysis Center

The list of legal changes affecting all SAP products in all countries is too big, so selecting only those relevant to your country and directly concerned with payroll is critical. You can choose the legal changes you need by using different filtering options. For example, to search for regulatory changes using natural language, enter a phrase like *Changes in US payroll* in the appropriate search field and click the *Go* button.

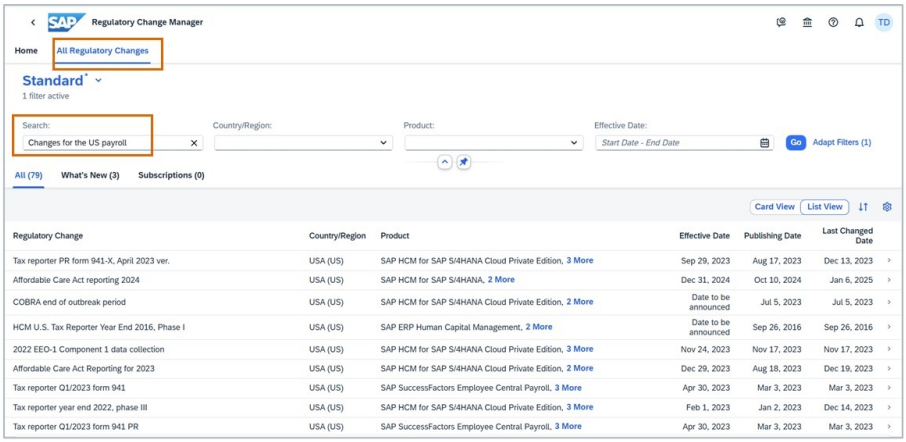

Figure 5: Regulatory Change Manager: All Regulatory Changes View

You can customize the filtering options to display only those that are inconvenient for you.

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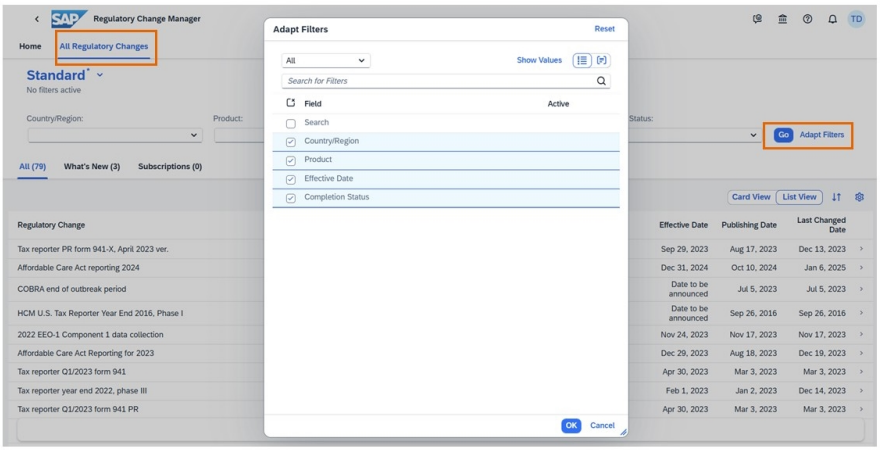

Figure 6: Regulatory Change Manager: Adapt Filters Settings

You can filter legal changes by country, product (e.g., SAP SuccessFactors Employee Central Payroll), period, and status.

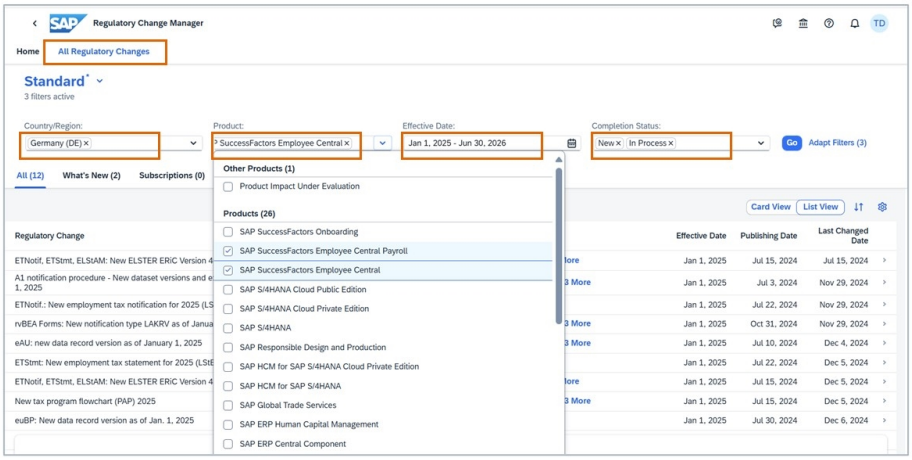

Figure 7: Regulatory Change Manager: Selection Options

You can save your selected filter criteria by following these steps: Click the arrow next to the default selection name (usually *Standard*). Then, click the *Save As* button in the lower right corner of the *My Views* pop-up window. In the *Save View* window, enter a name for your selection in the provided field and click *Save*. Once saved, all saved filtering selections can be selected from the drop-down list by clicking on the arrow to the right with the name of the current selection.

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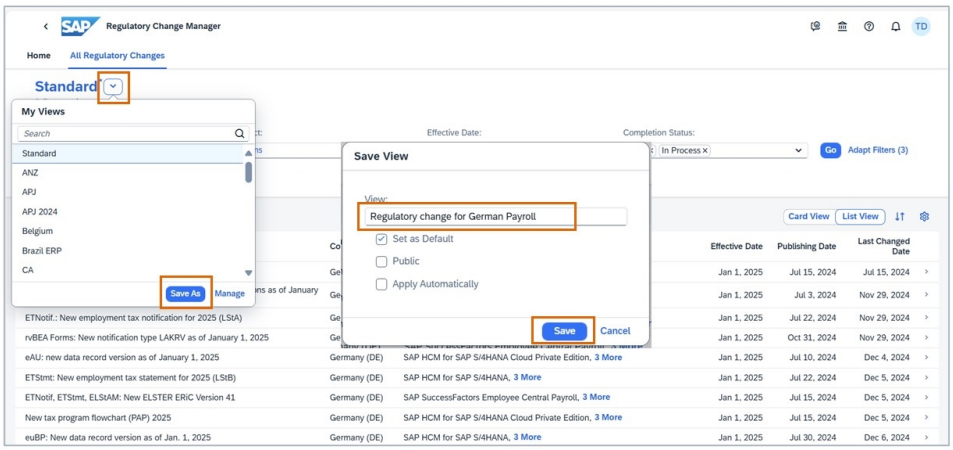

Figure 8: Regulatory Change Manager: Selection Options

You can also manage the notification settings for your filters and subscriptions.

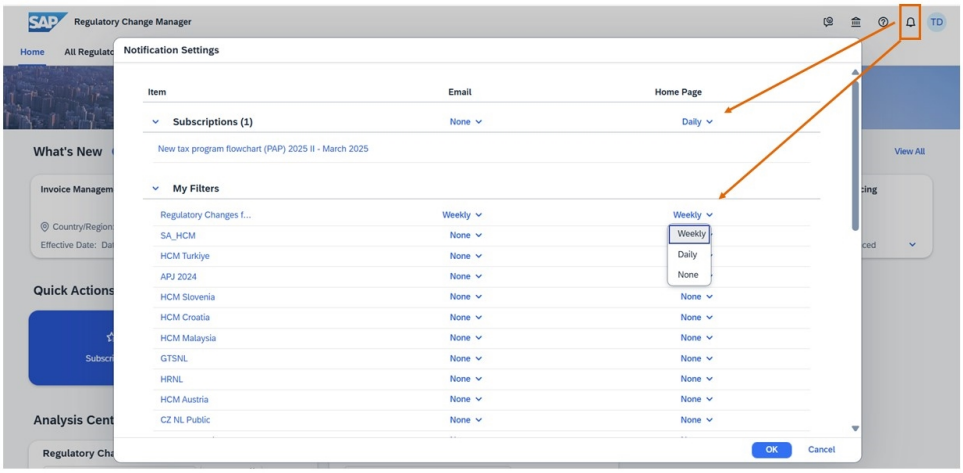

Figure 9: Regulatory Change Manager: Notification Settings

All regulatory changes related to your Country/Region can now be found easily under the *What's New* tab.

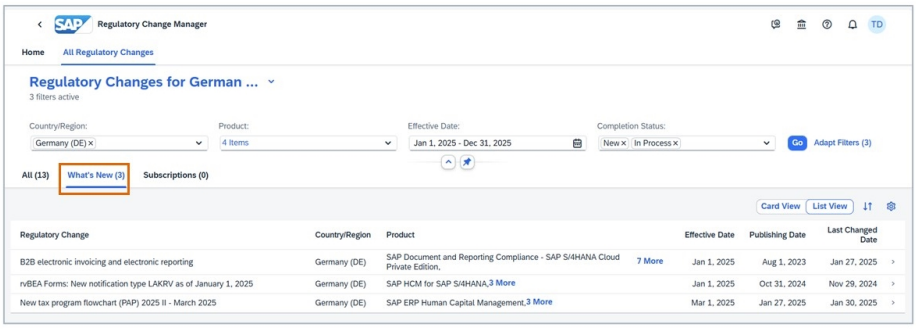

Figure 10: Regulatory Change Manager: What's New

Click on the corresponding line in the legal changes list to find general information about the specific regulatory change.

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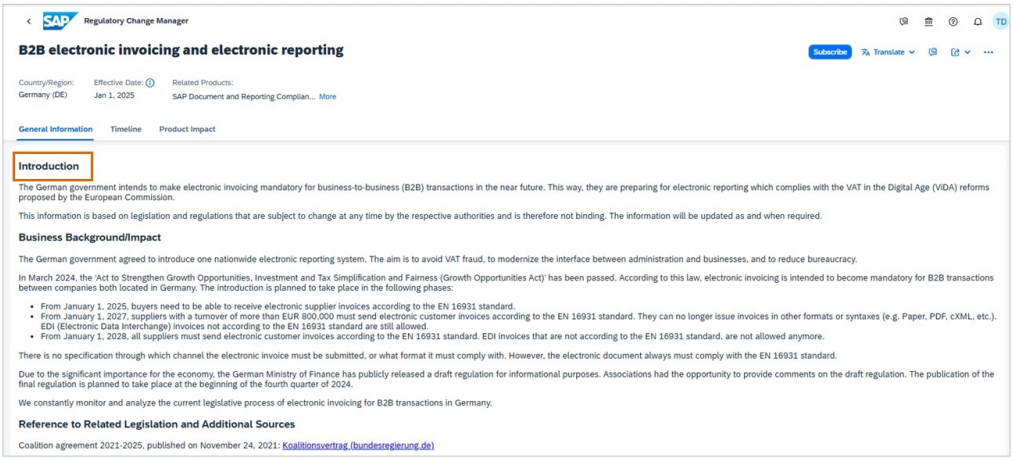

Figure 11: Regulatory Change: General Information

The *Timeline* tab provides information about the chronology of this legal change processing. You can subscribe to receive automatic notifications about this change.

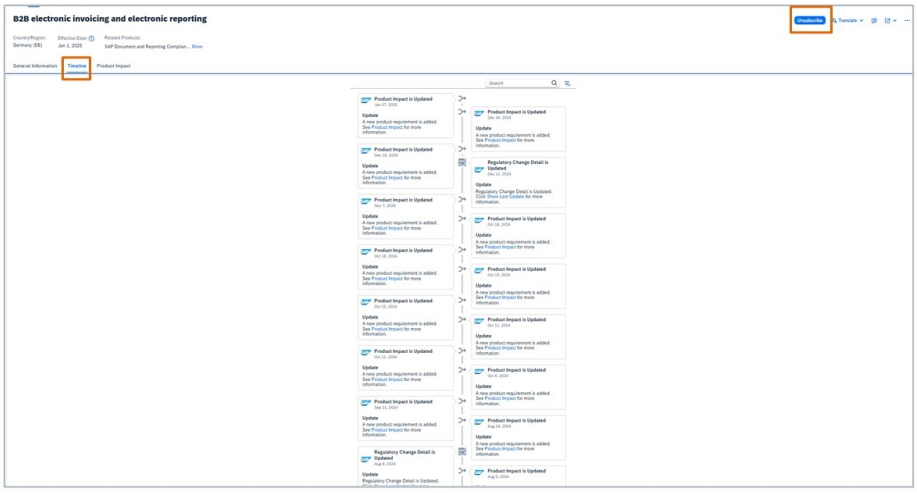

Figure 12: Regulatory Change: Timeline

Once this is done, the regulatory change you subscribed to the corresponding tab for the changes you are interested in.

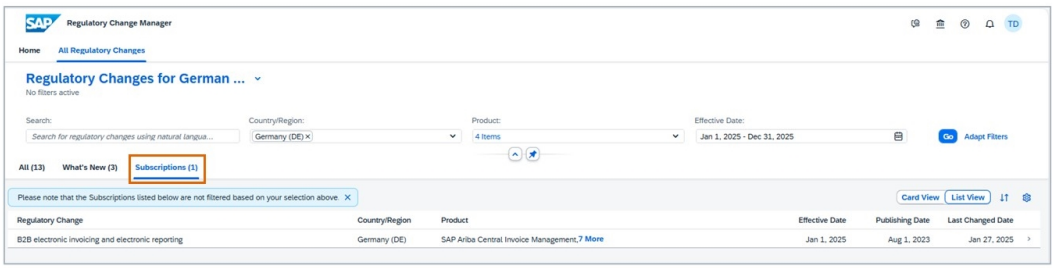

Figure 13: Regulatory Change Manager: Subscriptions

Also, you can find your subscriptions on the Regulatory Change Manager *Home* page.

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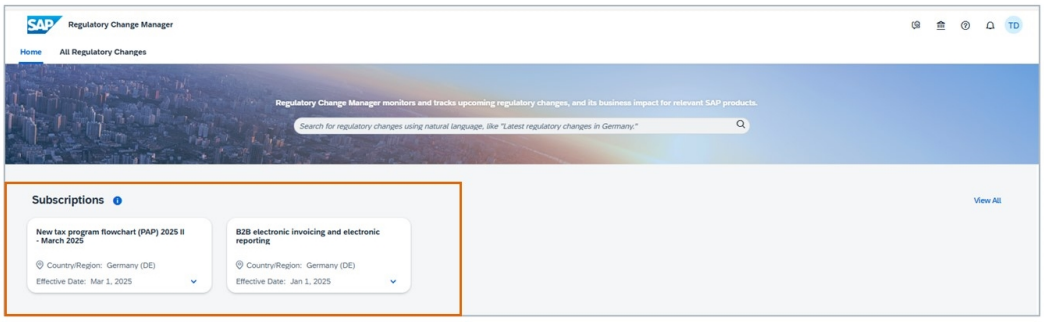

Figure 14: Regulatory Change Manager Home Page: Subscriptions

You can manage your notification settings from the *Home* page.

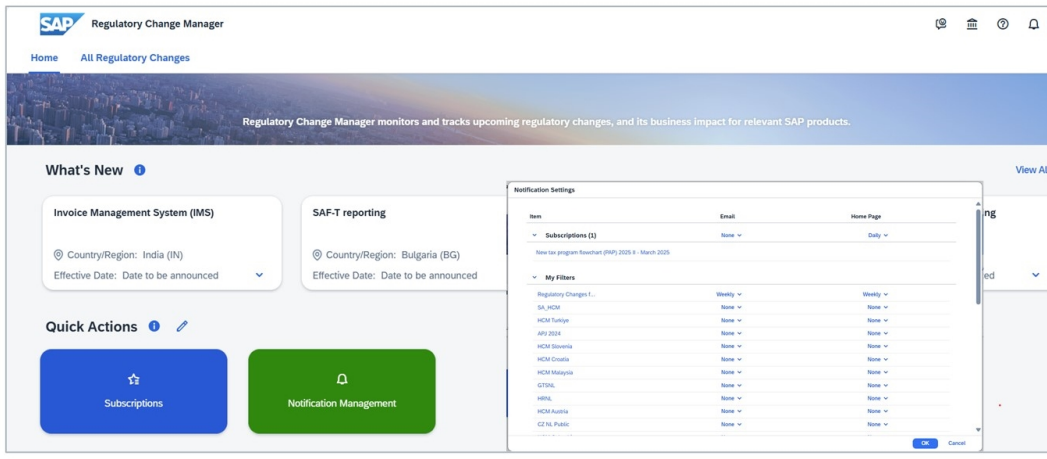

Figure 15: Regulatory Change Manager: Notification Management

Summary

The SAP Regulatory Change Manager allows you to do the following:

- Stay updated on legal changes: Customers must track relevant legal updates in Employee Central Payroll.
- Filter and search legal updates: Use the Regulatory Change Manager to find impactful changes.
- Visualize changes: Analysis Center displays regulatory changes for selected products and periods.
- Save and manage filters: Save filter criteria for future use and manage notification settings.
- Subscribe to notifications: Receive automatic updates about relevant regulatory changes.

LESSON SUMMARY

You should now be able to:

- Describe the purpose of Regulatory Change Manager Application.

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Unit 3
Lesson 2

Accessing the localization Work Zone Groups for Payroll

LESSON OBJECTIVES
After completing this lesson, you will be able to:

- Describe the purpose of the localization Work Zone Groups for Payroll

Localization Work Zone Groups for Payroll

Another valuable resource for customers is the Localization Work Zone Groups for Payroll. SAP Regional Collaboration Workzone Groups for Localization Topics | SAP Community .

These SAP regional collaboration spaces enable customers to share ideas, insights, and experiences related to localization topics.

Through these groups, participants can connect with SAP users, industry experts, and technology professionals to stay current with the latest localization features, capabilities, and innovations relevant to their region.

Customers can join groups based on their localization focus area and regional location.

Please note that access to these groups is restricted to SAP customers, partners, and employees of the respective country or region. Authentication is required and must be completed using an SAP Universal ID linked to the corporate e-mail address.

Summary

Purpose.

Collaborate with SAP customers, partners, and experts to share insights, best practices, and updates on localization topics.

Benefits:

- Exchange regional experiences and learn from peers.
- Stay informed about country-specific innovations and legal updates.
- Access expert discussions and SAP resources tailored to your region.

Access information:

- Available exclusively for SAP customers, partners, and employees
- Sign in with your SAP Universal ID (corporate email)
- Request access to the relevant regional group for your localization area

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LESSON SUMMARY

You should now be able to:

- Describe the purpose of the localization Work Zone Groups for Payroll

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Setting up Security

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify payroll-specific Role-Based Permissions.

Permissions Overview

In this section, you will learn about setting up security in SAP SuccessFactors.

SAP SuccessFactors Employee Central Payroll requires using Role-Based Permissions (RBP). SAP SuccessFactors uses these Role-Based Permissions to set up security.

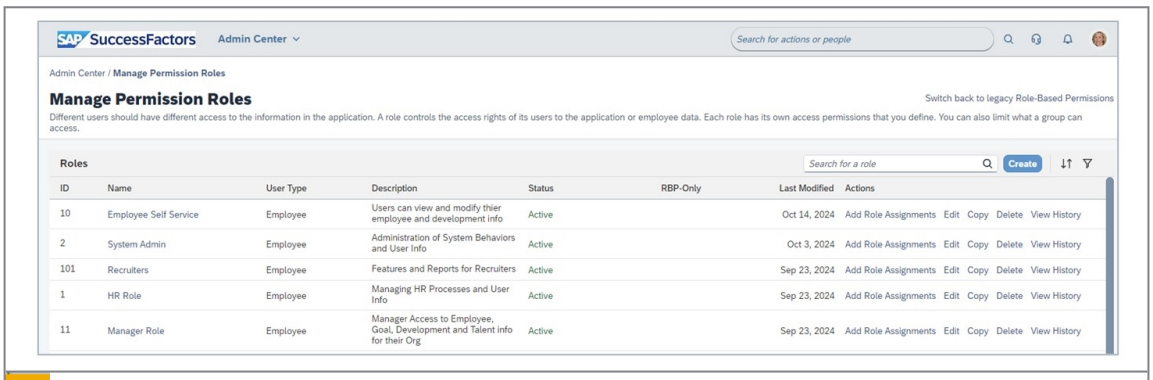

Figure 16: Manage Permission Roles - Admin Center

Role-Based Permissions Main Concepts

RBP uses *Permission Groups* and *Permission Roles* to grant permissions to users. Administrators can also grant permission to standard roles, such as employees or managers, or specific roles, such as payroll manager or payroll administrator. When granting these permissions, an administrator can limit the permissions to specific target groups of users.

RBP is a dynamic method of assigning permissions. For example, when an employee is promoted to a manager, the change is made in the user data (either imported or manually). The employee would automatically be assigned all the special permissions a manager should have. There is a full audit history of all changes made to a group or role.

SAP SuccessFactors Employee Central can go beyond these basic roles and allow organizations to set up roles based on several criteria. Role-Based Permissions in SAP SuccessFactors Employee Central are dynamic in that you can create groups and permissions based on the characteristics of jobs and roles. For example, you could grant the Regional HR Talent Manager role to everyone in the HR department with the country set to the US and then restrict the scope of employees managed to everyone in the US.

Role-Based Permissions are designed so that users will match more than one role. As a best practice, we recommend configuring roles by starting with the most generic role, as in *All*

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Employees Role, and casting the net as wide as possible to include all of the permissions given to everyone.

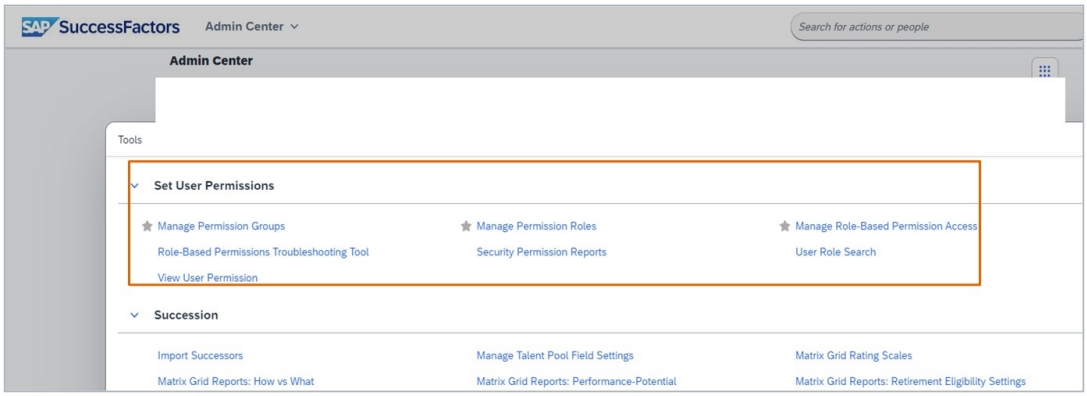

Figure 17: Role-Based Permissions - Set Up

Permission Roles

A *Permission Role* defines a set of permissions and grants these permissions to *Permission Groups* or role types, such as an employee or manager. Employees can have several different sets of permissions within a single role. Administrators define permission roles by navigating to *Admin Center → Set User Permissions → Manage Permission Roles*.

In *Manage Permission Roles*, you can create new roles or review, copy, and edit existing ones. You can review and edit the list of permissions granted by clicking the role name. The *Permissions* button displays a role's different permission sections.

For example, the payroll manager role may grant payroll managers the ability to access the *Payroll Control Center* user interface to run payroll processes.

If an organization wants to allow all employees to edit their personal information, such as bank account, they must allow the employee role to have edit permissions in personal information, which is in the permission section titled *Employee Central Effective Dated Entities*.

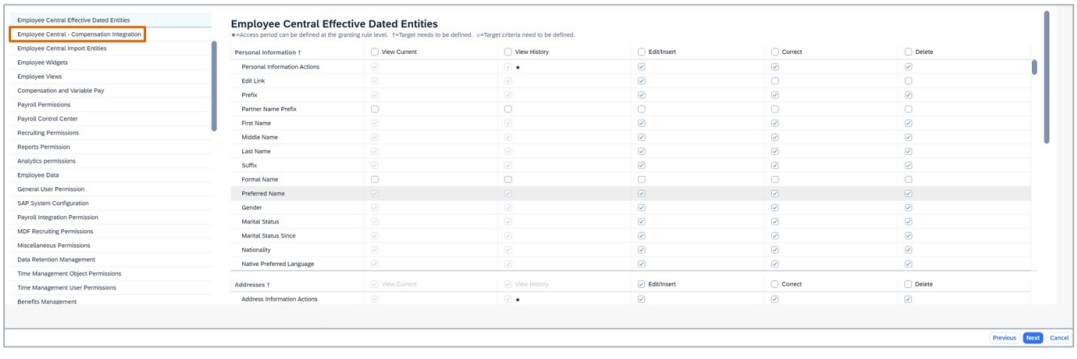

Figure 18: Manage Permission Roles - Employee Central Effective Dated Entities Permissions

Role Types

There are default roles that are similar across all organizations.

- **Employee** – all employees that work for an organization
- **Manager** – an employee that has direct reports

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- Matrix Manager – larger manager group that spans across similar groups, like managers within the same department
- HR Manager – a human resources representative with direct reports
- Payroll Manager – an employee who is responsible for running payroll on others in the organization
- Payroll Administrator – an employee who is responsible for evaluating and fixing payroll data

SAP SuccessFactors Employee Central allows you to use these roles or make these common roles even more granular. For example, you can break down Payroll Manager into smaller groups like US Payroll Manager & Canada Payroll Manager, each with its own administration permissions.

Target Groups

Once roles are created, groupings can be made based on specific role categories. Some of the categories can be commonly filtered groups, like regions. For instance, you can make a US Employees permission group that includes all employees with a corporate address in the US.

You can also assign a permission role to a permission group that applies to another permission group. For example, suppose an organization wants specific US Payroll Managers to be able to administer changes to all US Employees. In that case, they can create a US Payroll Manager permission group and use the US Employees permission group as the target group for the changes to be made.

Administration Levels

You can use administrative permissions to set granular control over access to payroll functionality. You can assign the payroll team access to only the functionality they need to access.

Using this approach for the payroll team creates three levels of administrators: Payroll Manager, Payroll Administrator, and Employee Central Payroll (ECP) Consultant.

Payroll Manager

A Payroll Manager runs the payroll process and ultimately signs off on the payroll. The payroll manager will run reports and view payroll statistics to ensure everything looks as expected. The Payroll Manager assigns issues and policy deviations identified to Payroll Administrators to investigate.

Payroll Administrator

A Payroll Administrator is someone who will look into specific scenarios that have been identified as payroll policy deviations (e.g., Pay Variance over 20% from the previous period) or payroll issues (e.g., Employee missing Address) to decide on what needs to be done for payroll to be processed correctly.

ECP Consultant / Support Team Member

The ECP Consultant is responsible for configuring the payroll system. The role of an ECP Consultant varies by organization. Some companies allow greater control over their HR and payroll teams, while others leverage their technical specialist to make key changes.

Payroll Control Center Permissions

Administrators can grant employees access to all or some tools by granting full or partial administrative functions. For example, if your company has specific employees who are allowed to run off-cycle payroll processes, you can allow access to this functionality.

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Payroll Processing is done in SAP SuccessFactors Employee Central Payroll using the *Payroll Control Center* functionality and the following nine user interfaces:

- *My Alerts*: UI to investigate Payroll Alerts
- *My Processes*: UI for Payroll processes
- *Unassigned Alerts*: UI for Admin to self-assign alerts
- *Manage Processes*: UI to manage payroll processes
- *Manage Policies*: UI to manage payroll policies
- *My Off-Cycles*: UI for running off-cycle processes
- *Manage Teams*: UI to configure teams
- *My Teams*: UI to manage specific team
- *Manage Configuration Access*: UI to manage configuration

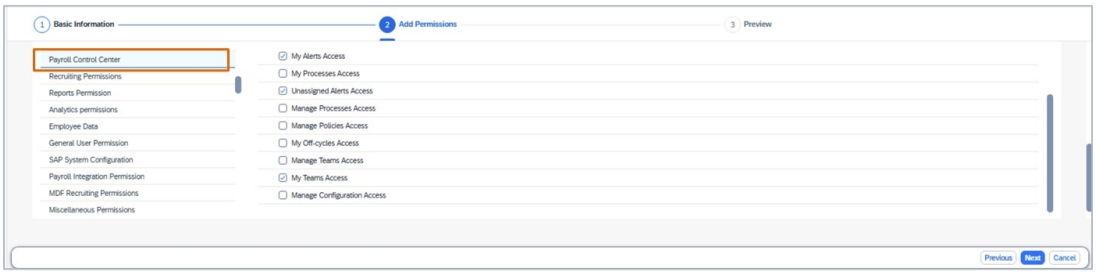

Figure 19: Payroll Control Center Permissions

Administrator Permissions

Role-Based Permissions are used to control access to other key payroll processes that will be talked about later, including the following:

- Payroll Data Maintenance Tasks (Complete Payroll Tasks)
- Payroll Data Maintenance Tasks Configuration (Payroll Unified Configuration)
- Data Replication Monitor

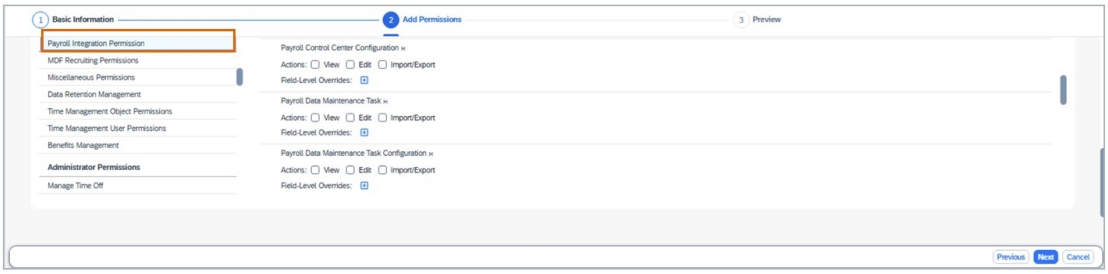

Figure 20: Payroll Integration Permission Settings

Summary

Permissions overview: SAP SuccessFactors uses RBP to set up security.

Role-Based Permissions:

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- Use Permission Groups and Roles to grant access.
- Dynamically assign permissions based on user data.

Permission Roles and Types:

- Define permission sets for roles like Employee, Manager, HR Manager, etc.
- Create granular roles (e.g., US Payroll Manager).

Administration Levels:

- Set access control for payroll functionality.

Payroll Control Center Permissions:

- Grant access to specific payroll tools and processes.

Administrator Permissions:

- Control access to key payroll processes.

LESSON SUMMARY

You should now be able to:

- Identify payroll-specific Role-Based Permissions.

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Unit 3
Lesson 4

Reviewing the Decisions Checklist for Setting up Security

LESSON OBJECTIVES
After completing this lesson, you will be able to:

- Review the decisions to be made about security before implementation.

Decisions Checklist

Based on the content in this section, please review the list of implementation decisions your company may need to make before implementation begins and discuss them with your stakeholders, project team, and SAP SuccessFactors implementation consultants. In this way, you will be better prepared to begin the implementation.

- Will Payroll Administrators be able to self-assign policy deviations/errors identified in payroll? If so, they should be given access to the *Unassigned Alerts* functionality.
- Will Payroll Managers be allowed to adjust the following aspects of the payroll process, or will this be something that Information Technology must do? If so, they should be given access to the *Manage Policies* and *Manage Processes* user interfaces.
  - Creation of new validation rules
  - Which validation rules are used in the payroll processes (Pre-Payroll & Production Payroll)?
  - Which Key Performance Indicator (KPI) data is used in the payroll processes (Pre-Payroll & Production Payroll)?
  - Assigning and unassigning Payroll Administrators involved in the payroll process.
  - Making payroll process periods available to run
  - Will it make sense to provide authorizations and training for the Manage Configuration application?
- Which off-cycle activities will your organization run, at what interval, and who will run them?**
  - Mass Off-Cycles (e.g., Annual Bonus Payments)
  - Individual Off-Cycles (e.g., Correction Payroll 2 days after every payroll)

  Additional Role-Based Permissions (RBP)-based decisions will be included later after the functionality is explained

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Summary

Begin evaluating which roles will be responsible for tasks related to payroll in your company or organization and what level of access will be required.

LESSON SUMMARY

You should now be able to:

- Review the decisions to be made about security before implementation.

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UNIT 4 Managing Employee Data

Lesson 1

Accessing Employee Data 33

Lesson 2

Adding New Employee 41

Lesson 3

Navigating to Payroll-Specific Information 45

Lesson 4

Reviewing the Decisions Checklist for Navigating Payroll-Specific Information 51

UNIT OBJECTIVES

- Describe the function of SAP SuccessFactors Employee Central in managing employee data.
- Describe the New Hire Process to add new employee.
- Identify payroll-specific portlets and applications.
- Review the decisions to be made about accessing employee data before implementation.

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Unit 4
Lesson 1

Accessing Employee Data

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe the function of SAP SuccessFactors Employee Central in managing employee data.

Introduction

SAP SuccessFactors Employee Central helps organizations manage their employees and offers a single view into all workforce data, including the employee record. SAP SuccessFactors Employee Central is the mandatory system of record for SAP SuccessFactors Employee Central Payroll. All HR events are managed in SAP SuccessFactors Employee Central. Payroll-relevant data is either replicated to payroll or maintained in SAP SuccessFactors Employee Central using mashups.

An integrated part of the SAP SuccessFactors HCM of applications, SuccessFactors Employee Central, drives your company's success by helping employees, managers, administrators, and payroll track employees and their compensation all in one place. SAP SuccessFactors is a powerful all-in-one application that empowers your workforce to manage their career in one user-friendly system.

Most SAP SuccessFactors Employee Central's actions begin in the People Profile. Anyone can find an employee's profile using the universal *Action Search*. In the People Profile, you can view and edit a person's personal and employment information on one simple consolidated page.

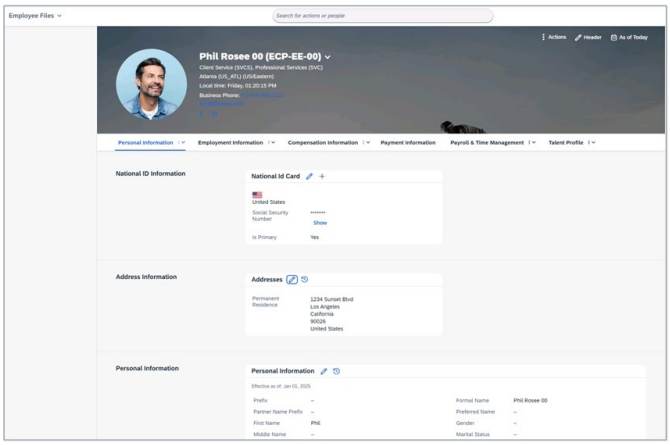

Figure 21: People Profile

Personal and Employment Data

The personal and employment data create the structure for the Employee Files. This data typically contains information such as compensation and contact information.

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Personal data is information that is not job-dependent. You can see this information from *Home → My Employee File* on the employee's *Personal Information* page.

Employment data is information that is related to an employee's job. This information is shown on the employee's *Employment Information* page.

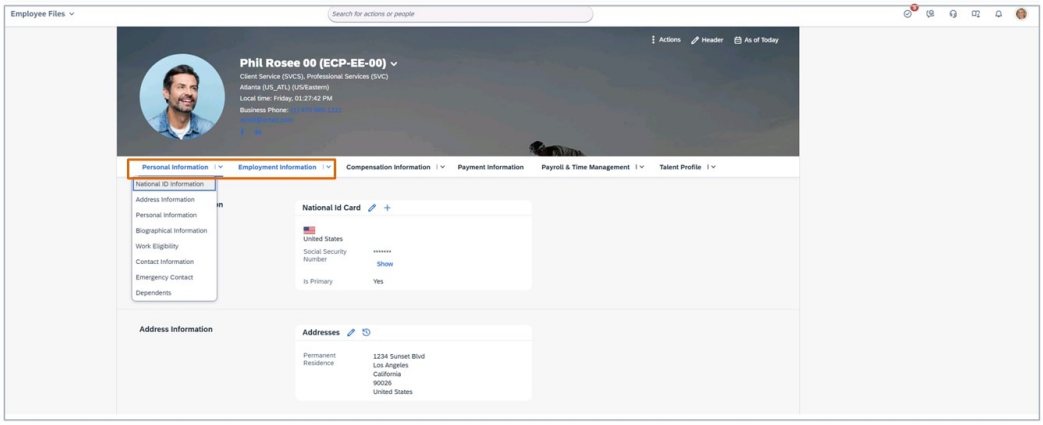

Figure 22: My Employee File

Country-Specific Personal Data

If your company spans the globe, you will likely have country-specific data to ensure that personal and employment data are entered into the system using the standards necessary for the geographical location. Your organization must decide which fields are country-specific, which different values a field can have, and which fields need a country-specific format. Examples include national ID format and address requirements.

SAP SuccessFactors Employee Central includes localizations for 90 countries. These localizations include the ability to use country-specific fields, picklists, and validations depending on the legal requirements for the region. The SAP SuccessFactors Employee Central Payroll solution is localized for 52 countries.

This course will use the US country-specific version of the SAP SuccessFactors Employee Central Payroll solution as examples. In the project, you will work with the version of the solution that is relevant to your country.

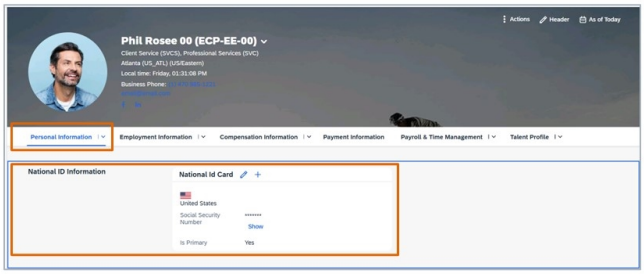

Figure 23: National ID Information in People Profile

Employee File User Interface

Most SAP SuccessFactors Employee Central's actions begin in the *Employee File*. The Employee File contains an employee's personal information, compensation information, work eligibility information, and status. Anyone can find an employee's file using the *People Search* box at the top middle of the SAP SuccessFactors portal.

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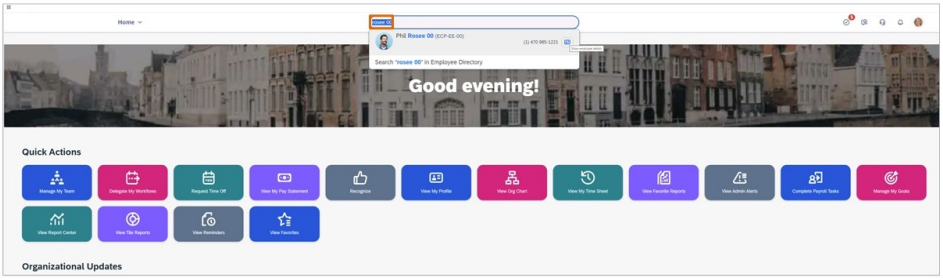

Figure 24: People Search Box

You can choose the *Employee Information* icon on the search result.

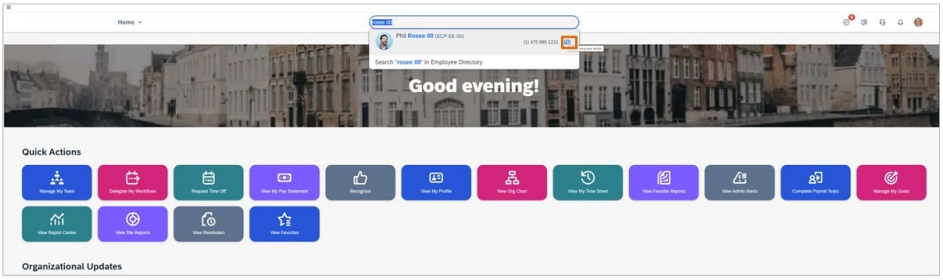

Figure 25: Employee information Icon

Profile Preview appears on the right side of the screen, providing general information about the person you are looking for. Select the employee's name to view their Full Profile, or click *Spotlight* to get the most important employee information.

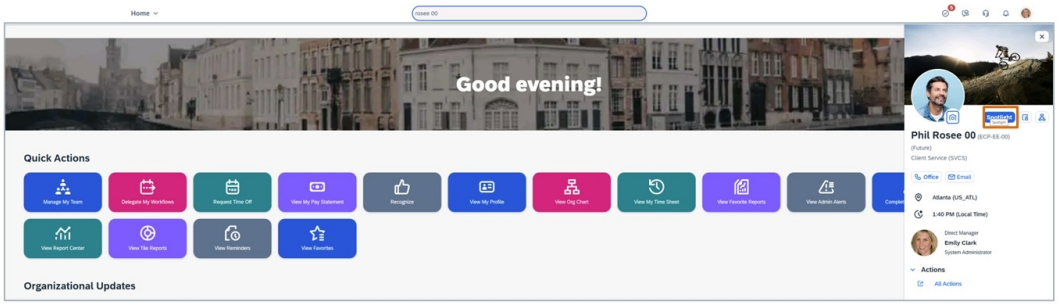

Figure 26: Profile Preview

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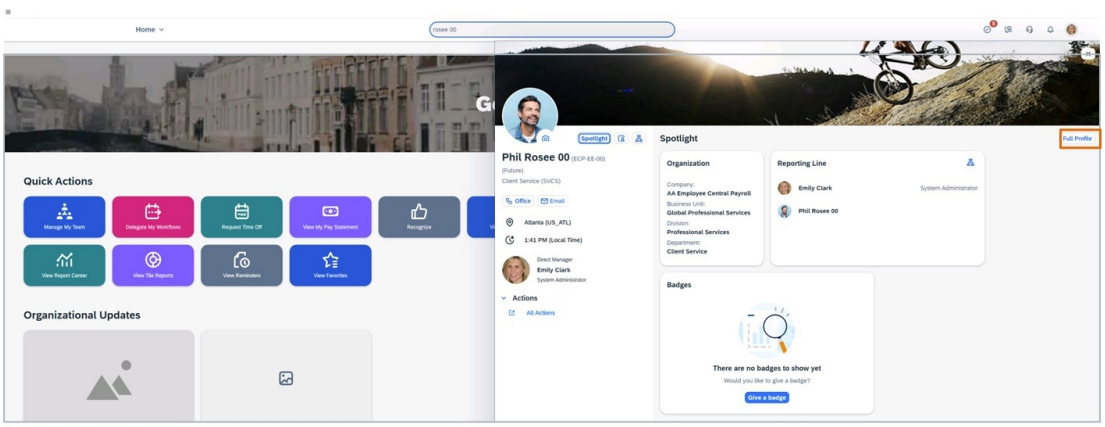

Figure 27: Spotlight

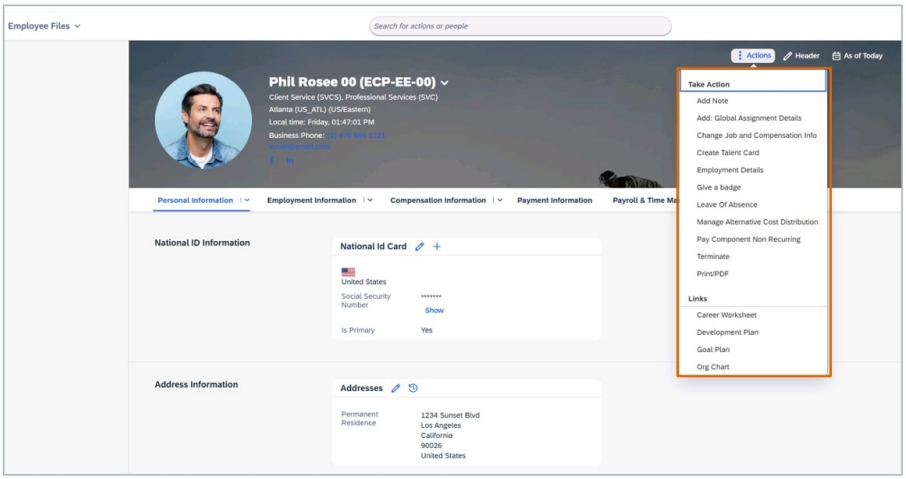

Figure 28: Full Profile of Employee

Personal Information

The *Personal Information* page includes non-business information about the employee, such as national ID, address, biographical, and contact information. Your organization can determine which fields are required and who will have view/edit privileges.

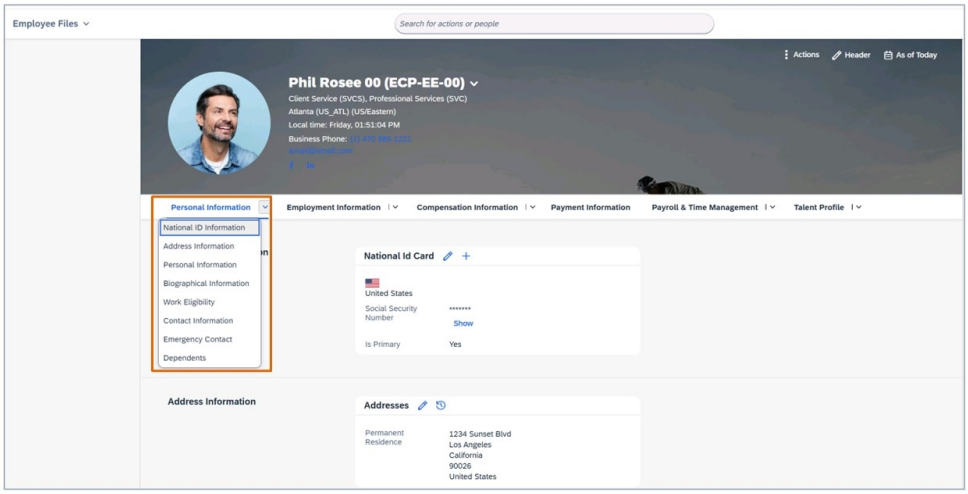

Figure 29: Employee File - Personal Information Page

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Employment Information

The *Employment Information* page is the core of the HRIS system. It contains job and position information and employment details, such as hire date. Administrators and managers can use the *Take Action* drop-down menu to update employee records, issue spot bonuses, make changes to benefit plans, and more.

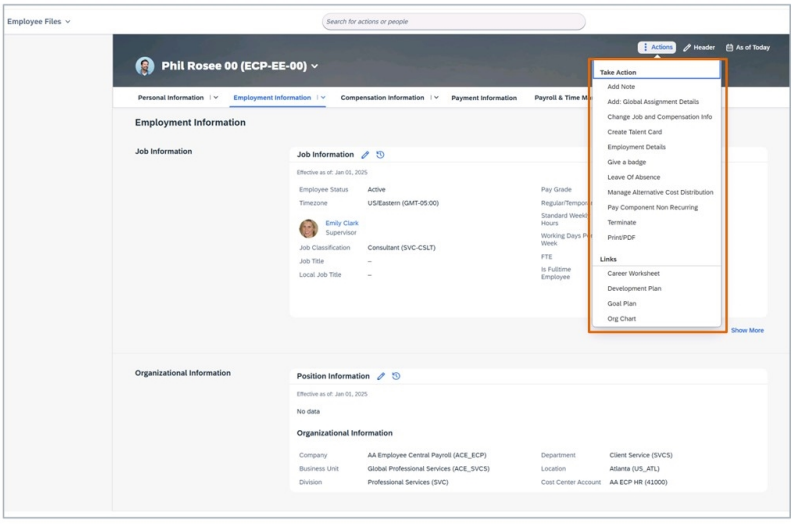

Figure 30: Employee File - Employment Information

Effective Dated vs. Non-Effective Dated

SAP SuccessFactors Employee Central is a system of record that stores dates for all transactions and certain data using effective and non-effective dating. Effective dating in SAP SuccessFactors Employee Central means the system stores a history of changes over time. The system defines the start date for these fields as the effective date and the end date as January 1, 9999. Upon entering a new record, the system looks at the effective date and inserts it into the history.

For example, your organization hired employees on January 1, 2024. An employee will relocate to a new address starting April 1, 2025. You need to update the information in the system with an effective date of April 1, 2025. SAP SuccessFactors Employee Central automatically stores an end date for their initial hired job as March 31, 2025.

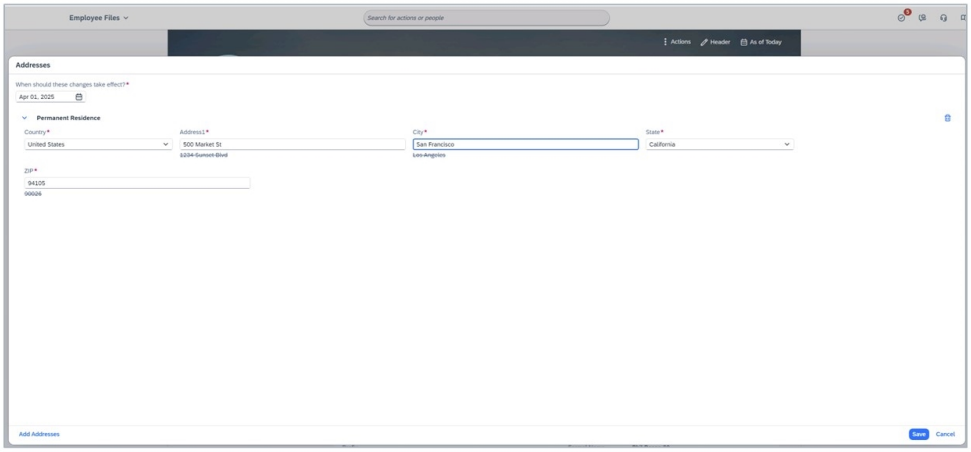

Figure 31: Effective Dated Transaction Example

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The updated record screen clearly indicates which fields have been edited. You can view the change history and current information for each period.

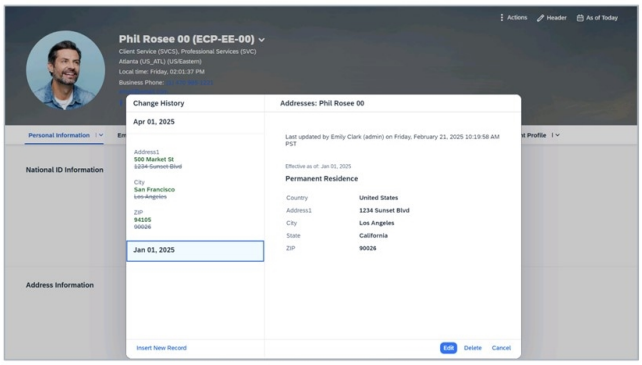

Figure 32: Historical Address Record

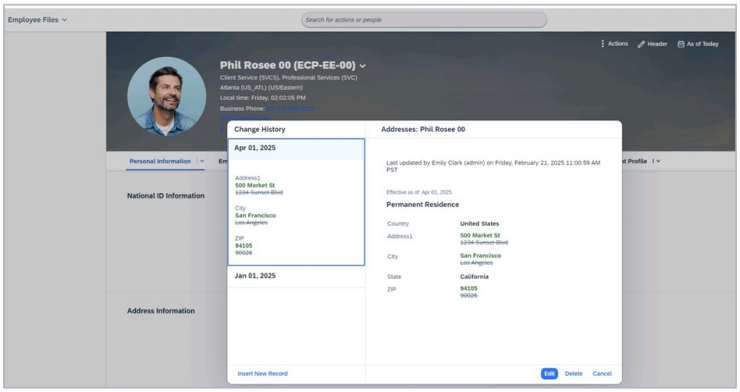

Figure 33: Updated Address Record

Summary

Overview of SAP SuccessFactors Employee Central:

Manages employees and serves as the system of record for payroll.

- Centralizes workforce data and HR events.
- Integrates with SAP SuccessFactors HCM applications.

Personal and Employment Data:

- Personal data: Non-job-dependent information (e.g., compensation, contact info).
- Employment data: Job-related information (e.g., job details, hire date).

Country-Specific Personal Data:

- Supports global companies with country-specific fields and validations.
- Localized for 90 countries; payroll solution localized for 52 countries.

Employee File User Interface:

- Central hub for employee information.
- Accessible via People Search; includes Personal and Employment Information pages.

Effective Dated vs. Non-Effective Dated:

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- Effective dating tracks historical changes with start and end dates.
- Automatically updates records with new effective dates and stores change history.

Key Features:

- People Profile: Centralized employee information and editing.
- Country-specific localizations: Adherence to regional legal requirements.
- Employee File: Comprehensive view of employee data.
- Effective dating: Historical tracking of employee records.

LESSON SUMMARY

You should now be able to:

- Describe the function of SAP SuccessFactors Employee Central in managing employee data.

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Adding New Employee

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe the New Hire Process to add new employee.

Add New Employee

One of the most basic transactions organizations perform in SAP SuccessFactors Employee Central is adding a new employee. When an organization first implements SAP SuccessFactors Employee Central, existing employees are added to the system using an import. However, once the system is up to date, new employees are added by a system administrator.

There are several ways to add a new employee to an organization.

Two of the most common are:

- Use the *Add New Employee* button on the *Org Chart*.
- Navigate to the *Admin Center* → *Manage Employees* → *Update User Information* → *Add New Employee*.

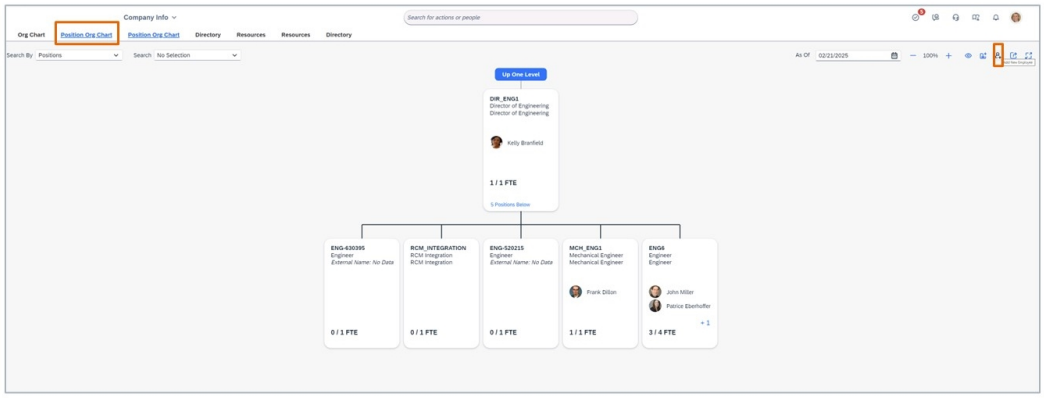

Figure 34: Add New Employee - Org Chart

The New Hire Process has four steps. These steps are system-defined:

- **Identity**: The user completes the fields for the new employee's name, biographical information, and national ID. The user also sets the hire date and the new employee's company.
- **Personal Information**: The user fills in the fields for the new employee's home address, contact numbers, etc. This information is displayed on the new employee's file under the *Personal Information* section.

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- **Job Information**: The user completes the fields for the new employee's organization, manager, job code, etc. This information is displayed on the new employee's file under the *Employment Information* section.
- **Compensation Information**: The user fills in the fields for the new employee's salary, bonus, etc. This information is displayed on the new employee's file under the *Employment Information* section.

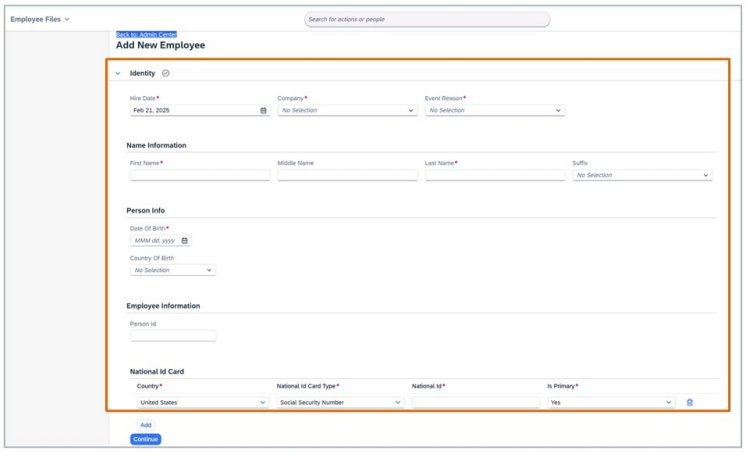

Figure 35: Add New Employee Screen

During the first step of the process, the system automatically checks whether the new hire is an existing employee. If a match is found, a pop-up window prompts you to synchronize with the existing person in the system.

Depending on the administrator's permissions, the user can select one of the rehire variants: *Rehire and use former data* or *Rehire with new employment*.

After completing all four steps of the new hire process, the user clicks *Submit*. Typically, an approval workflow is started.

The administrator who created the new employee record can view the Approval Chain.

Once all approvers accept the change, the new employee is added to the system.

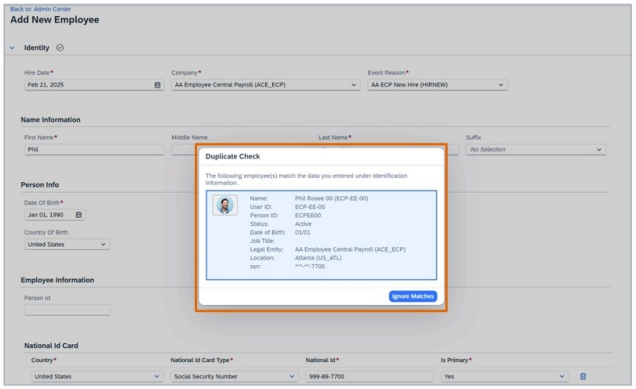

Figure 36: System Duplicate Check

Customers can configure a check to search for existing active/inactive employees during the New Hire process. This check is based on the *Matching User Configuration* generic object. You can configure which validation combinations should be used and if the customer would like to

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use the rehire's existing personal, job, or compensation information. If the customer makes no changes, the system behaves as before using the existing check.

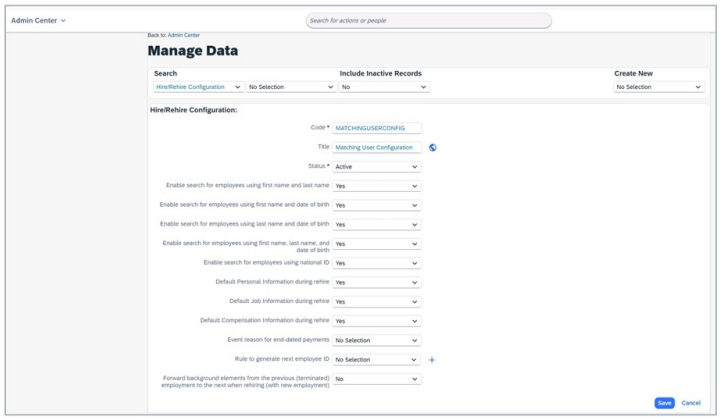

Figure 37: Matching User Configuration in Manage Data

Employee New Hire No-Shows

If you've enabled the reporting of new hire no-shows in SAP SuccessFactors Employee Central, this information is now transferred to your Employee Central Payroll system.

- Some hired employees ignore their signed contracts and don't show up to start work. Because the person is technically hired in the system, you can consider them a no-show and set their status to *Inactive* in Employee Central.
- When you report no-shows in Employee Central, the corresponding event reason is now transferred to your Employee Central Payroll system and processed as a personnel action type.
- If an employee in Employee Central is marked as *No-show*, Employee Central Payroll sets the employee status to *Inactive* so that the changes are reflected in the payroll processing accordingly.

Summary

Adding New Employee: Four system-defined steps: Identity, Personal Information, Job Information, Compensation Information.

New Hire Process:

- Automatic check for existing employees.
- Rehire options based on administrator's permissions.
- Approval workflow initiated upon submission.

Customization:

- Configure checks for existing active/inactive employees.
- Use Matching User Configuration for validation combinations.

Employee New Hire No-Shows:

- Report no-shows in Employee Central.
- Transfer no-show status to Employee Central Payroll.

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- Set employee status to Inactive for payroll processing.

LESSON SUMMARY

You should now be able to:

- Describe the New Hire Process to add new employee.

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Navigating to Payroll-Specific Information

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify payroll-specific portlets and applications.

Pay Components

An important part of paying employees correctly is having the appropriate pay components available in the system for HR & Payroll to use on employee data. Examples of pay components are the following:

- Base Salary – Main Payment
- Spot Bonus – One Time payment
- Cost of Living Adjustment – Recurring
- Medical Deduction – Recurring

A different pay component is needed for different types of payments.

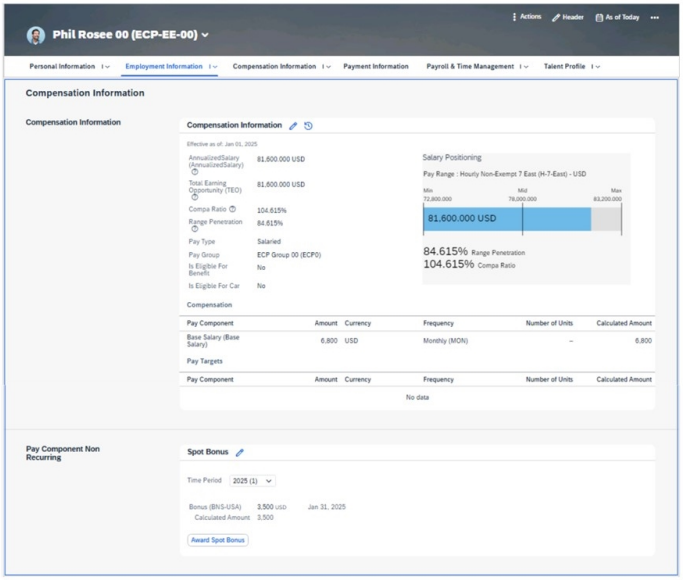

Figure 38: Pay Components

Pay Groups

An important part of paying employees is putting employees into pay groups that determine the frequency and dates of payroll. Some organizations pay all their employees on the same

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payroll and frequency (e.g., Monthly), whereas others split it based on factors (e.g., Hourly in one run and Salary in another run).

In SAP SuccessFactors, the employee's pay group is within *Compensation Information* in the *Employment Information* section of the Employee File.

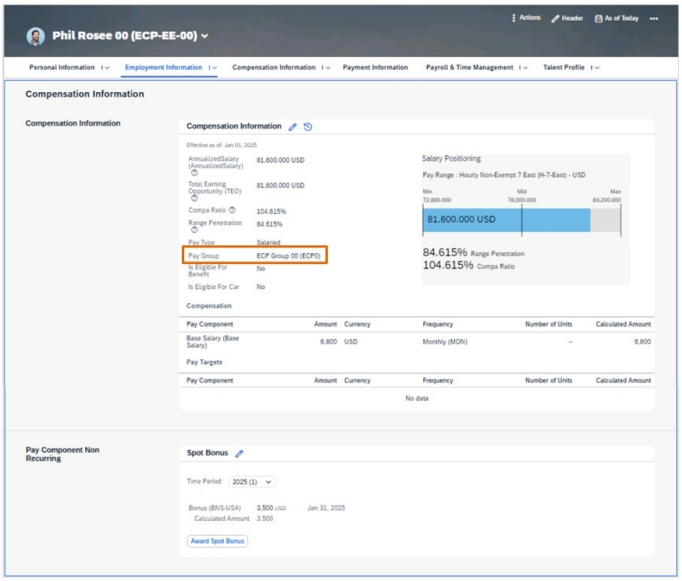

Figure 39: Pay Groups

Employee Data Replication

After an employee has been hired into SAP SuccessFactors Employee Central, they will automatically be replicated in SAP SuccessFactors Employee Central Payroll.

To see this information, navigate to the *Data Replication Monitor*.

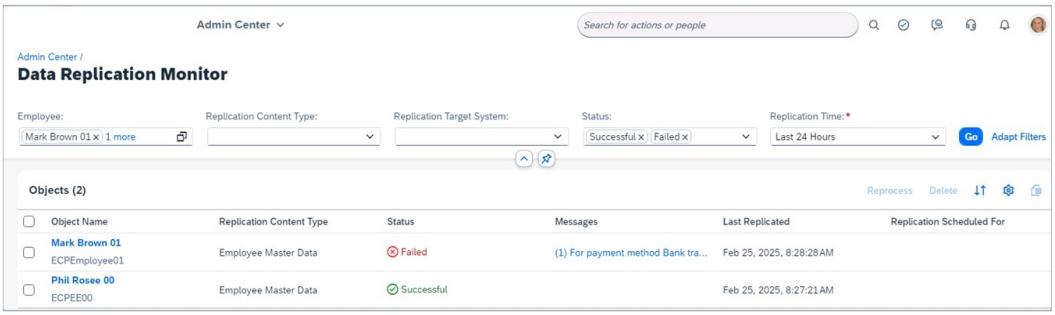

Figure 40: Data Replication Monitor

Complete Payroll Tasks

SAP SuccessFactors Employee Central Payroll keeps track of data changes to allow Payroll to create/verify/update payroll-specific data. These changes are shown to Payroll via a *Home* page tile called *Complete Payroll Tasks*. The three types of data changes tracked include:

- New Hire
- Address Change
- Terminations

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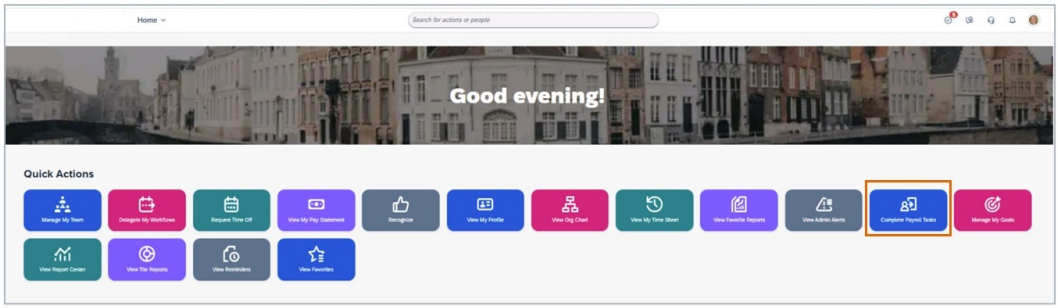

Figure 41: Complete Payroll Tasks Tile

You can also find the *Complete Payroll Tasks* in your *To-Do* list by clicking the *notification* icon in the upper right corner of the SAP SuccessFactors *Home* page.

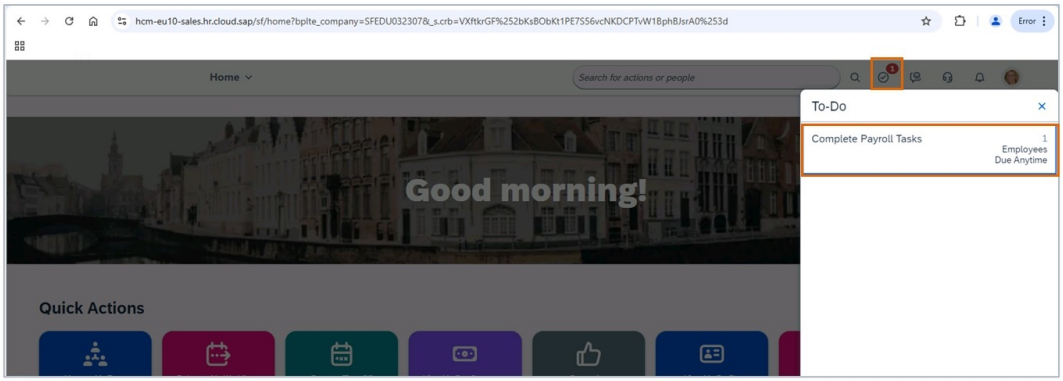

Figure 42: To-Do List

Choose the specific employee and enter payroll-relevant information on the *Complete Payroll Tasks* page. This page lists the employees and the relevant infotypes required to complete the process, which depends on the selected payroll task type and configuration.

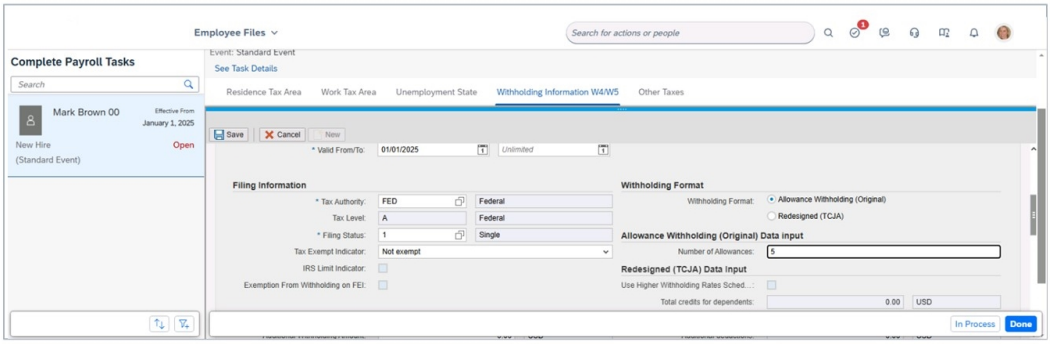

Figure 43: Complete Payroll Tasks

Payroll Information

After employees are hired into the system, the employee information specific to Payroll is grouped into its own section on the Employee Profile called *Payroll Data*.

This will include many country specifics and key information, such as the employee's Payroll Status and the ability to view pay statements.

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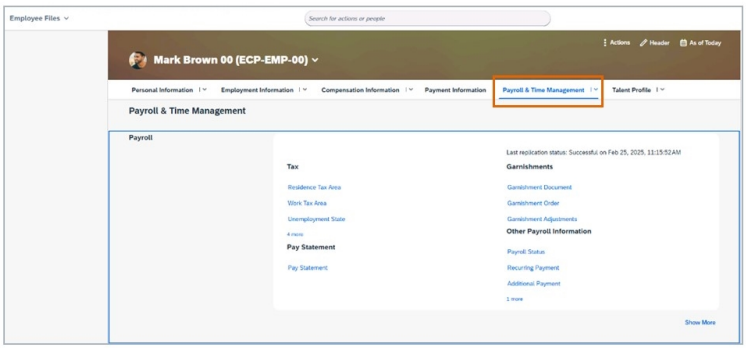

Figure 44: Payroll Data - Employee Profile

Payroll Information & Complete Payroll Task

The fields that are shown in the *Complete Payroll Task* tile and the *Payroll Information* on the Employee Profile are configurable using the setup called *Payroll Unified Configuration*. This is unique for each country.

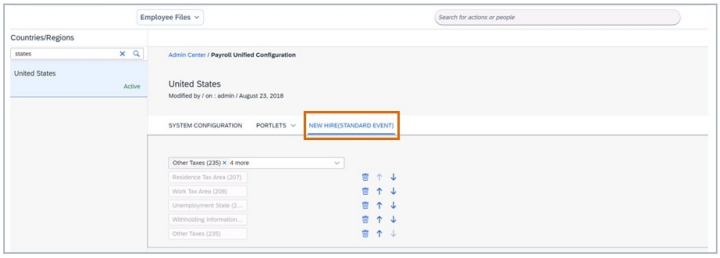

Figure 45: Payroll Unified Configuration

Alumni Access to Restricted Payroll Information

Alumni access enables former employees to continue using the system after they leave the company. You can now create self-service links that are only accessible to alumni users. Business rules set the eligibility and duration of this and can be customized or revoked manually.

The employee with the alumni role can access and use the employee self-service features on both the Payroll Information screen and the Payroll Information card in the Full Profile.

This feature benefits HR and payroll administrators by minimizing their administrative tasks and lowering costs associated with handling terminated employees. This feature also benefits alumni employees by providing them with seamless access to their systems and RBPs after they have completed their initial employment with the company.

Key Capabilities

- Alumni users receive an activation e-mail and use an identity-authentication method to sign in.
- Access to payroll and tax-related documents (e.g., pay statements, W-2 or superannuation forms) via the People Profile “Payroll” tab.
- Configurable expiration of alumni access: the system can alert users before termination of access.

Business Benefits

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- Reduces HR and payroll back-office queries from former employees seeking historical documents.
- Enhances employer brand by supporting alumni access to their own records.

Considerations

- Determine how long alumni access should remain active, and implement expiry or purge rules accordingly.
- Ensure that only permitted data is visible or downloadable in the alumni portal, to comply with privacy and retention regulations.
- Coordinate with IT/security teams for external user management, license considerations, and account lifecycle.

Employee Access to their Inactive Employment Data

The Employee Access to their Inactive Employment Data resembles Alumni access ; however, it is essential to understand that it addresses a different use case. The employee is not terminated – they are still working within the company, so they have active employment. However, the employee has also had inactive employment, for example, an international transfer from the US to Germany on October 1st. So the employee now has active jobs in Germany and inactive employment in the US. The internal transfer was maintained through the creation of a new employment opportunity.

Previously, employees couldn't access inactive employees, but now, with the 2H 2025 Release, this is possible. The employee can access, for example, their former employment profile or review pay statements from their US employment.

This innovation is not only payroll-specific – the employee can also access other non-payroll data related to their inactive employment. However, we had a critical aspect – access to pay statements for inactive employees. As a Role-Based Permissions (RBP) administrator, you can now enable employees to access data from inactive employment records. A User Status field has been added to the Grant Access step of the role assignment creation process. This new field allows administrators to specify whether the role applies to active or inactive employees.

Key Capabilities

- Employees can switch between active and inactive employment profiles to view legacy data.
- Inactive employment information (e.g., pay statements) can be accessed when relevant.
- Historical employment data remains available for reference, audit, or internal processes such as rehiring.

Business Benefits

- Provides continuity of information across employment episodes
- Reduces lost visibility when an employee changes roles, leaves and returns, or holds multiple employment records.
- Enhances HR reporting and employee self-service by giving richer context to employment history.

Considerations

- Ensure that inactive data access complies with data privacy and retention policies.

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- Define which parts of the inactive employment should be visible to avoid unnecessary exposure or confusion.
- Users should be educated on how to use the employment switcher and understand which record they are viewing

Summary

Pay Groups:

- Determine payroll frequency and dates for employees.
- Configured within the Compensation Information section of the Employee File.

Employee Data Replication:

- Automatic replication of hired employees from SAP SuccessFactors Employee Central to Employee Central Payroll.
- Monitor replication via the Data Replication Monitor.

Complete Payroll Tasks:

- Track data changes for payroll processing (New Hire, Address Change, Terminations).
- Accessible via Home page tile or To-Do list.
- Enter payroll-relevant information on the Complete Payroll Tasks page.

Payroll Information:

- Grouped into the Payroll Data section on the Employee Profile.
- Includes country-specific information and key details like Payroll Status and pay statements.

Configuration:

- Fields in the Complete Payroll Task tile and Payroll Information are configurable using Payroll Unified Configuration.
- Configuration is unique for each country.

LESSON SUMMARY

You should now be able to:

- Identify payroll-specific portlets and applications.

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Unit 4
Lesson 4

Reviewing the Decisions Checklist for Navigating Payroll-Specific Information

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Review the decisions to be made about accessing employee data before implementation.

Decisions Checklist

Based on the content in this section, please review the list of implementation decisions your company may need to make before implementation begins and discuss them with your stakeholders, project team, and SAP SuccessFactors implementation consultants. In this way, you will be better prepared to begin the implementation.

- What data is required in the countries where you will be running payroll that will be on employees' profiles? Who will be able to view it, who will be able to change it, and who will be able to delete it?
- What personal, employment, and payroll-specific data will different users require access to for their jobs?
  - Who will be able to view it, who will be able to change it, and who will be able to delete it?
  - Do you need the No-Show flag, and who will be responsible for marking the employee as such?
- Which of the following three changes should trigger a review of Payroll Tasks, and which payroll-specific data should be included?
  - New Hires
  - Address Changes
  - Terminations
- How frequently will data be replicated to the payroll system, and will push replication be used?
- How many pay groups will we need, and what are the dates associated with these pay dates?
- Which pay components will we need?
  - Where will the Pay Components be entered (Primary Payment, Recurring, or Non-Recurring)
  - Will the pay component count towards the total gross?

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  - Will the pay component be subject to reduction/proration?
  - How will the pay component be taxed?
  - How will the pay component be stored?
- For deduction pay components, what are their priorities for arrears if there is not enough money?
- Should the pay component be collected in a future period if there is not enough money in the current period?
- How aggressively should the system collect the money owed if an employee does not have enough payment to cover it? All at once as soon as possible, or should a loan and balance be set up?

Summary

Begin evaluating what type of employee data is required for payroll in your country or region and who will be able to view, change or delete it. Identify and evaluate the process and replication requirements there are for payroll-specific data.

LESSON SUMMARY

You should now be able to:

- Review the decisions to be made about accessing employee data before implementation.

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UNIT 5 Processing Payroll

Lesson 1

Describing Payroll Activities 55

Lesson 2

Managing Payroll Alerts 59

Lesson 3

Reviewing the Decisions Checklist for Managing Payroll 67

UNIT OBJECTIVES

- Describe the process for pre-payroll, production, and post-payroll activities.
- Describe key elements for managing payroll alerts.
- Review the decisions to be made about payroll activities and alerts before implementation.

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Unit 5
Lesson 1

Describing Payroll Activities

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe the process for pre-payroll, production, and post-payroll activities.

Introduction

In this section, you will learn how SAP SuccessFactors Employee Central Payroll allows payroll managers and administrators to process payroll using the *Payroll Control Center*.

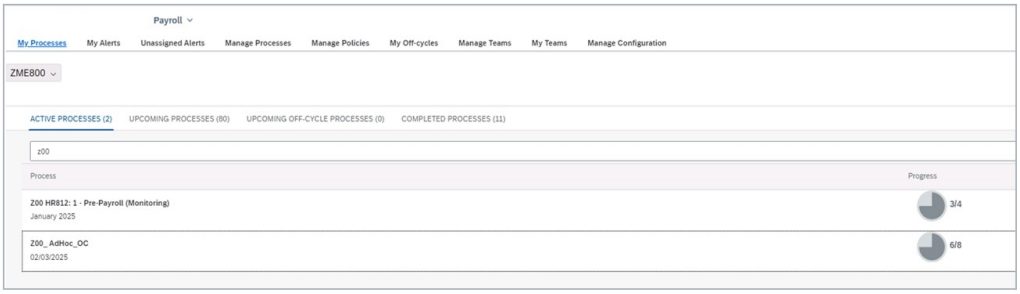

Figure 46: Payroll Control Center

Pre-Payroll Activities

Payroll managers will have a process for pre-payroll activities that will be run prior to running a live production payroll. As delivered by SAP SuccessFactors, the pre-payroll activities have the following steps. These are run from the *My Processes* user interface.

- Create Test Payroll Data - Test payroll results are created to be used for KPIs and Payroll Alerts
- Posting simulation - A simulation is run for posting test payroll results to Financial Accounting (FI)
- Initiate Policies
  - Pre-defined payroll alerts are checked against test payroll data
  - KPI information is filled from test payroll data
- Monitoring - The payroll manager is given a user interface to view Payroll alerts identified and KPI data

Production-Payroll Activities

Payroll Managers will have a process for payroll activities that will be run for a live productive payroll. As delivered by SAP SuccessFactors Employee Central Payroll, the productive payroll activities have the following steps. These are run from the *My Processes* user interface.

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- Start Payroll - Payroll relevant data changes are locked
- Run Payroll - Payroll data is created in the system
- Posting Simulation - A simulation is run for posting payroll data to Financial Accounting (FI)
- Initiate Policies
  - Pre-defined payroll alerts are checked against real payroll data
  - KPI information is filled from real payroll data
- Monitoring - The payroll manager is given a user interface to view Payroll alerts identified and KPI data
- End Payroll - Payroll is marked as completed and payroll-relevant changes are unlocked

Post-Payroll Activities

Payroll Managers will have a process for post-payroll activities that occur after executing a live productive payroll. As delivered by SAP SuccessFactors, the post-payroll activities have the following steps. These are run from the *My Processes* user interface.

- Create Posting Documents - Payroll data is used to create posting document for Financial Accounting
- Release Posting Document - Posting documents are released in preparation for transfer to Accounting
- Transfer Posting Document - Posting documents are sent to Financial Accounting

> Note:
> Please note that SAP also delivers other post-payroll processes such as Data Medium Exchange (DME) and check printing to create direct deposit files and print payroll checks.

Key Performance Indicators

Payroll managers can be shown Key Performance Indicator (KPI)/Statistical data about their payroll process in the form of tiles during pre-payroll, productive payroll, and mass off-cycle processes.

Some examples of this include the following:

- Total Gross Pay with a comparison between the previous period
- Total Net Pay with a comparison between the previous period
- Total Employee & Employer taxes with a comparison between the previous period

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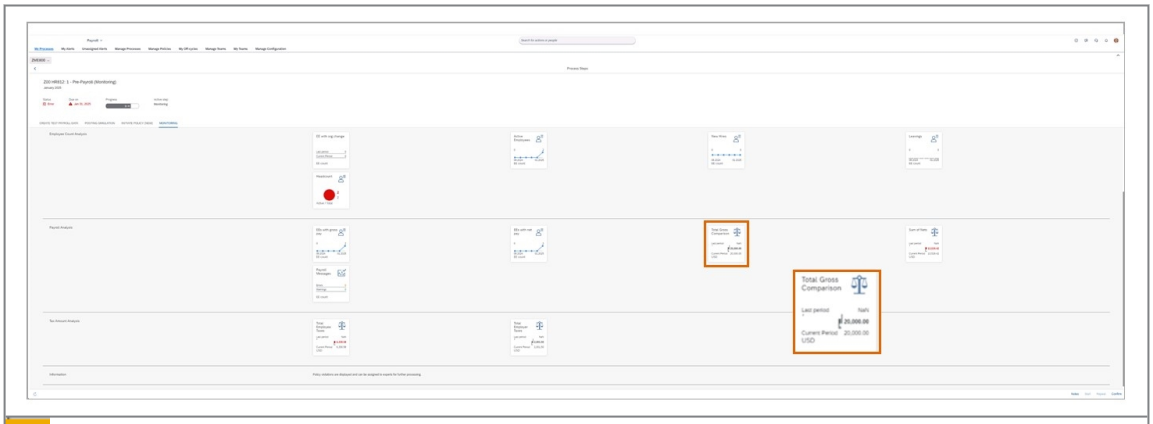

Figure 47: Payroll Process KPI Tile

The Payroll manager can drill down into key performance indicators (KPIs) by clicking on the tile of the metric they are interested in, such as Total Gross Pay with a comparison between the previous period.

Figure 48: KPI Drill Down

Summary

Payroll Control Center: Allows payroll managers and administrators to process payroll.

Pre-Payroll Activities:

- Create Test Payroll Data.
- Posting Simulation.
- Initiate Policies (check alerts and KPIs).
- Monitoring (view alerts and KPI data).
- Run from the My Processes user interface.

Production-Payroll Activities:

- Start Payroll (lock data changes).
- Run Payroll (create payroll data).
- Posting Simulation.
- Initiate Policies (check alerts and KPIs).
- Monitoring (view alerts and KPI data).
- End Payroll (mark completion, unlock changes).
- Run from the My Processes user interface.

Post-Payroll Activities:

- Create Posting Documents.

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- Release Posting Document.
- Transfer Posting Document.

Key Performance Indicators (KPIs):

- Displayed as tiles during pre-payroll, productive payroll, and mass off-cycle processes.
- Drill-down capability for detailed analysis.

LESSON SUMMARY

You should now be able to:

- Describe the process for pre-payroll, production, and post-payroll activities.

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Unit 5
Lesson 2

Managing Payroll Alerts

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe key elements for managing payroll alerts.

Payroll Alerts

Payroll managers will be alerted to things that will cause payroll errors or policy deviations that need to be looked into. Some examples of this include the following:

- Missing Address or Bank account
- Pay Variance over 10% from previous Period
- Retro Payment over $5,000
- Employees with Gross pay over threshold amount ($10,000)

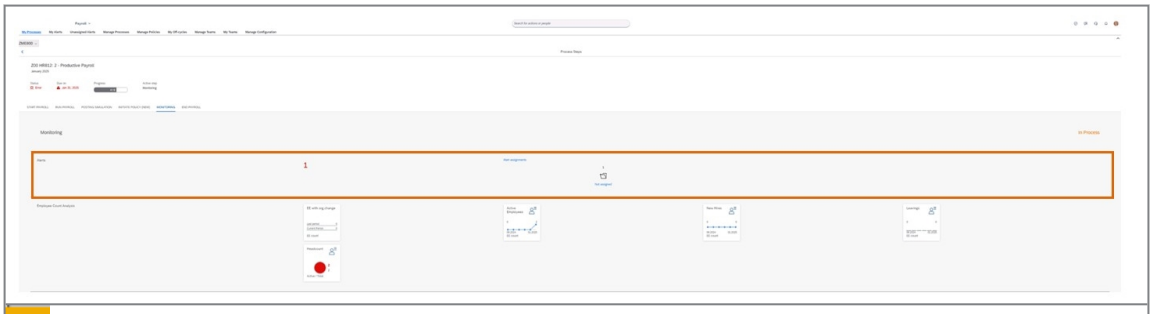

Figure 49: Payroll Alerts by Process

The Payroll managers can investigate the policies that caused alerts.

Figure 50: Payroll Alerts Sorted by Policies

The Payroll Manager can review issues related to specific compliance violations.

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Figure 51: Payroll Alerts by Specific Validation Rules

Finally, the Payroll manager can identify employees with issues and compliance violations.

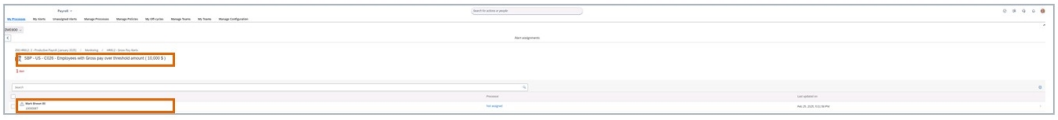

Figure 52: Payroll Alerts by Employees

Payroll Alerts – Assignment

Payroll managers can assign alerts to the administrators on their team using the *My Processes* user interface.

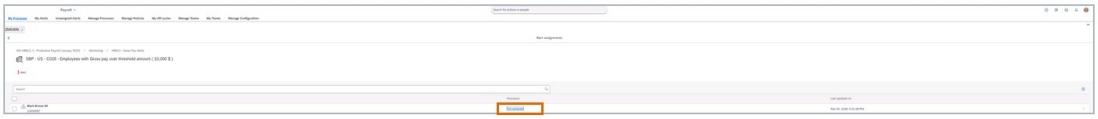

Figure 53: Payroll Alerts - Assignments

Payroll administrators, payroll managers, and users can claim currently unassigned alerts using the *Unassigned Alerts* user interface.

If desired, Teams may be created for this purpose as well. Each team includes a team lead who delegates people to alerts associated only with that team (e.g., Payroll Canada is only assigned to payroll users on the Canada team).

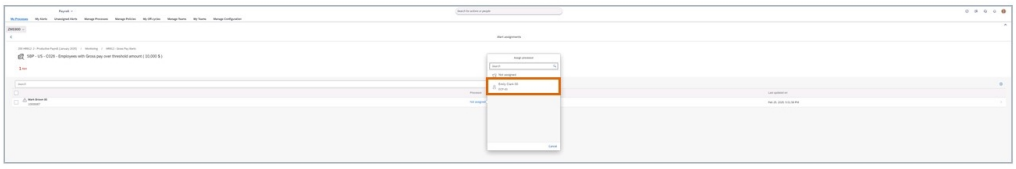

Figure 54: Payroll Alerts - Assign Processor

Payroll Alerts – Detailed View

Once an alert has been assigned, the payroll administrator can access it using the *My Alerts* user interface. Every payroll alert has detailed information to provide background on the alert so the payroll administrator has the information needed to make an informed decision.

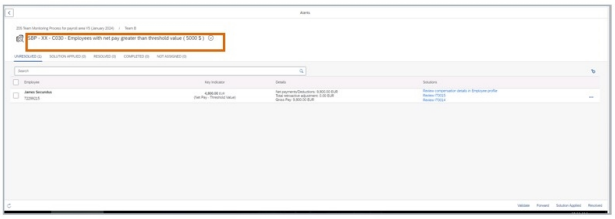

Figure 55: My Alerts App of Payroll Administrator

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The payroll alert detailed view should also provide detailed information showing the payroll results, including what they consist of. This will help the payroll administrator determine if action is required.

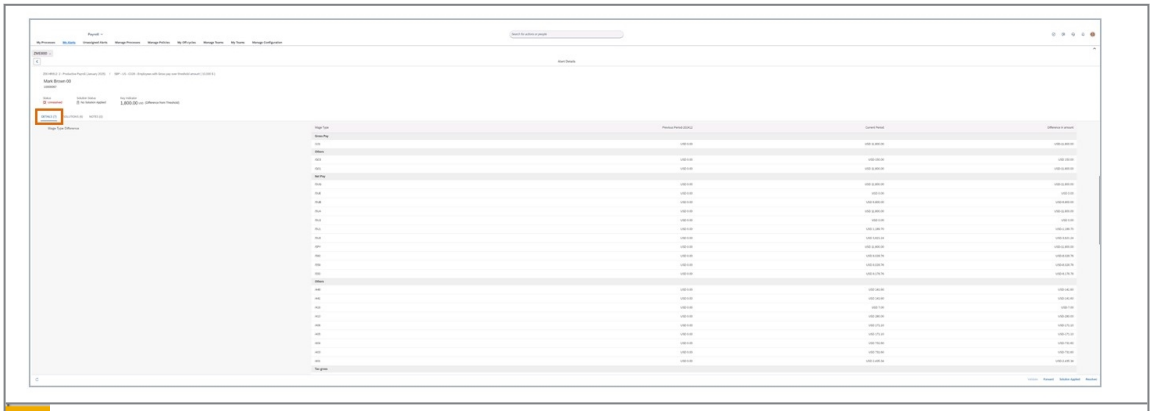

Figure 56: Payroll Alerts - Details

Payroll Alerts – Solution

Every payroll alert should come with a *Solution*. This will be how the administrator can fix the issue if it needs to be resolved. For example, if an employee's payments exceed the threshold value (more than $10,000), the payroll administrator needs to review the employee's pay components and verify the correct amount.

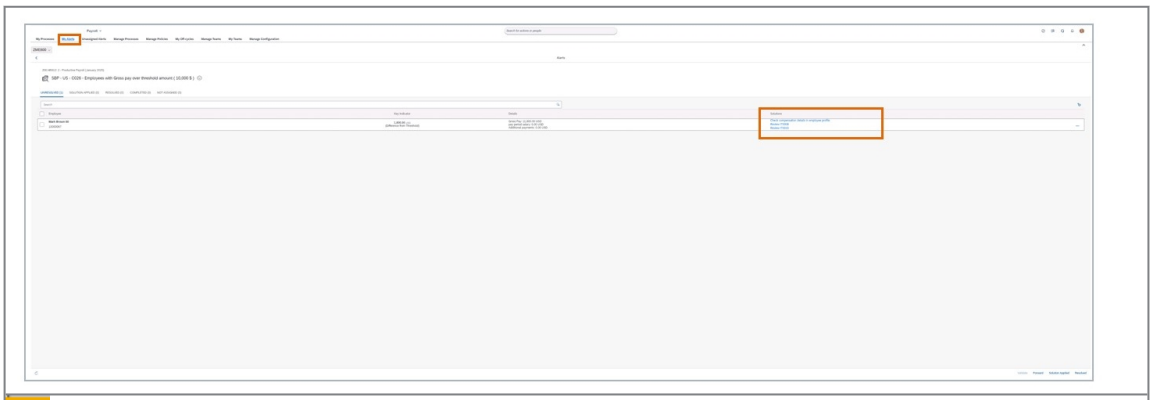

Figure 57: Payroll Alerts - Solution

When the administrator clicks on the solution, they should be taken exactly where they need to go to resolve it. In the case of an employee who is receiving more than $10,000, this should be on their profile.

The administrator can then navigate to their bonus and change as needed.

Once the change is made, this will automatically be reflected in Payroll.

Payroll Alerts – Resolved Reasons

For some payroll alerts, there is nothing to fix or resolve. It may be something the payroll team needed to be alerted to, but it turned out to be correct after investigation. For example, if someone has a payment of more than $10,000 and it turns out that they have a negotiated bonus, then this is not something that requires fixing, and it is correct.

The payroll administrator must provide the reason why the alert isn't an issue and that its status is marked as resolved without any changes.

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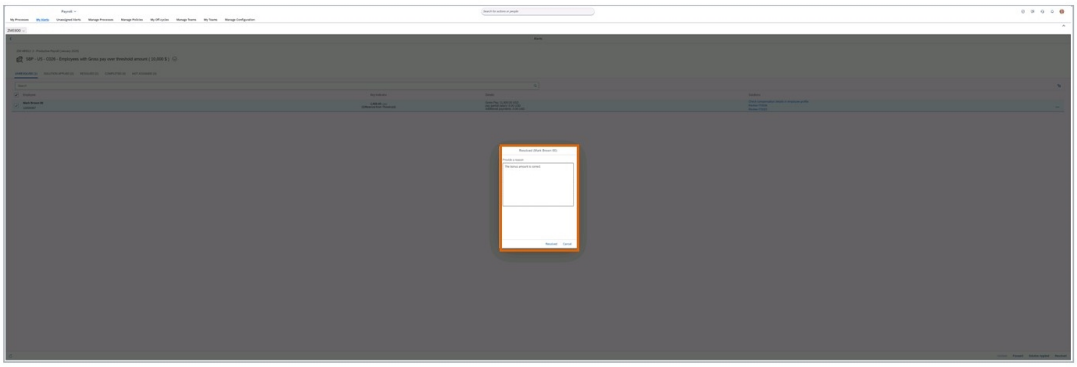


Figure 58: Payroll Alerts - Resolved Reasons

Update Payroll Data During Payroll

When production payroll is being run, employees can change payroll data, but they will not be replicated over to Payroll. As an exception to this rule, if a payroll administrator is assigned a payroll alert and is specified as someone who can maintain data during payroll, these changes will be included in the payroll run.

This is set up in the SAP SuccessFactors Employee Central Payroll (ECP) system in transaction code `PYC_ADM_TRANSACTION`.

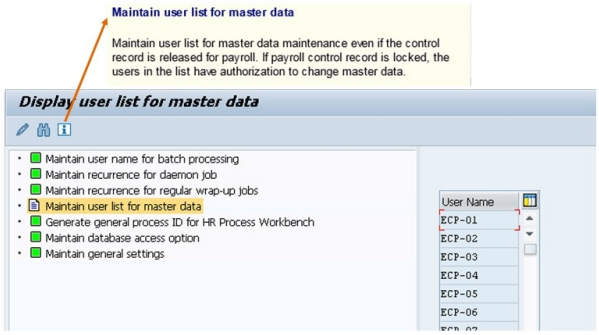


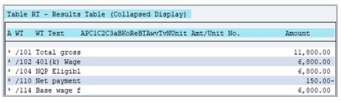
Figure 59: Update Payroll Data During Payroll Process

Payroll Calculations

The SAP SuccessFactors payroll engine is extremely powerful and capable of nearly any customer requirement. Regardless of organizations' complex rules or union agreements, the SAP SuccessFactors system can handle them. Organizations need to determine.

The main tool for configuring payroll is the *Payroll Schema*.

Figure 60: Payroll Schema



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Examples of typical payroll tasks:

- Payment Models allow the organization to have deductions come out at a pre-defined scheduled interval (e.g., union dues that automatically come out in the last pay period of each month)
- Individual Goals and Limits allow organizations to set up specific amounts (e.g., an employee can contribute $50 per pay period to the United Way up until $250 is collected)
- Limits on deductions allow organizations to set specific limits on a single or group of pay components (e.g., all contributions should not exceed $100 in a month and $500 in a calendar year)
- Percentage-Based Deductions - What is the base to calculate the percentage-based deduction? Which pay component counts towards it? (e.g., 401K)
- Arrears Recovery (e.g., an employee owes the company $2,000 due to overpayment)

Pay Statement

After payroll is run, employees can view their pay statements. The pay statement is configurable in the Employee Central Payroll (ECP) system.

Key values can be shown in Employee Central such as the following:

- Total Gross
- Total Net Payment
- Total Employee Taxes

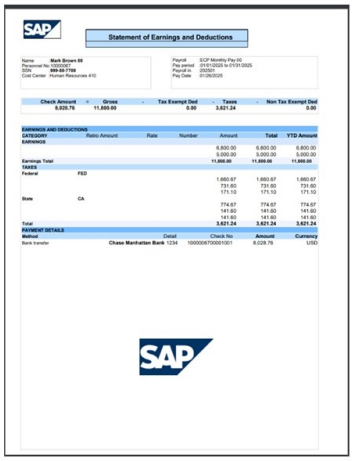

Figure 61: Pay Statement Example

View Pay Statements with Joule (SAP Business AI Assistant)

Leveraging its generative AI capabilities, Joule, SAP's AI copilot, enables a conversational interaction with payroll data. When integrated with SAP SuccessFactors Employee Central Payroll, Joule allows employees to access, review, and better understand their pay statement information using natural language.

Using Joule, employees can:

- View a pay statement summary, including:

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  - Pay date
  - Payout amount
  - Gross amount
- Access pay statements as PDF documents
- Review payment history from active employment
- Request AI-generated explanations of:
  - Their most recent pay statement
  - Differences between the current and a previous pay statement

With the Explain My Pay Statement capability, employees can ask Joule to clarify specific terms, amounts, earnings, or deductions displayed on their pay statement. Depending on system configuration, the explanation may include wage type names and payroll result details, based on document grounding and defined policy content. Joule generates responses using the organization's payroll context and policy documents to ensure explanations are consistent and relevant.

This AI-assisted self-service capability helps employees better understand how their pay is calculated and contributes to reducing payroll-related inquiries and support tickets. Payroll administrators and managers benefit from fewer clarification requests while maintaining control over payroll accuracy and validation processes.

How It Looks

This screenshot illustrates a dialog with Joule using the "Explain my Pay Statement feature. In this example the user asks Joule to explain a high deduction amount shown on the Pay Statement

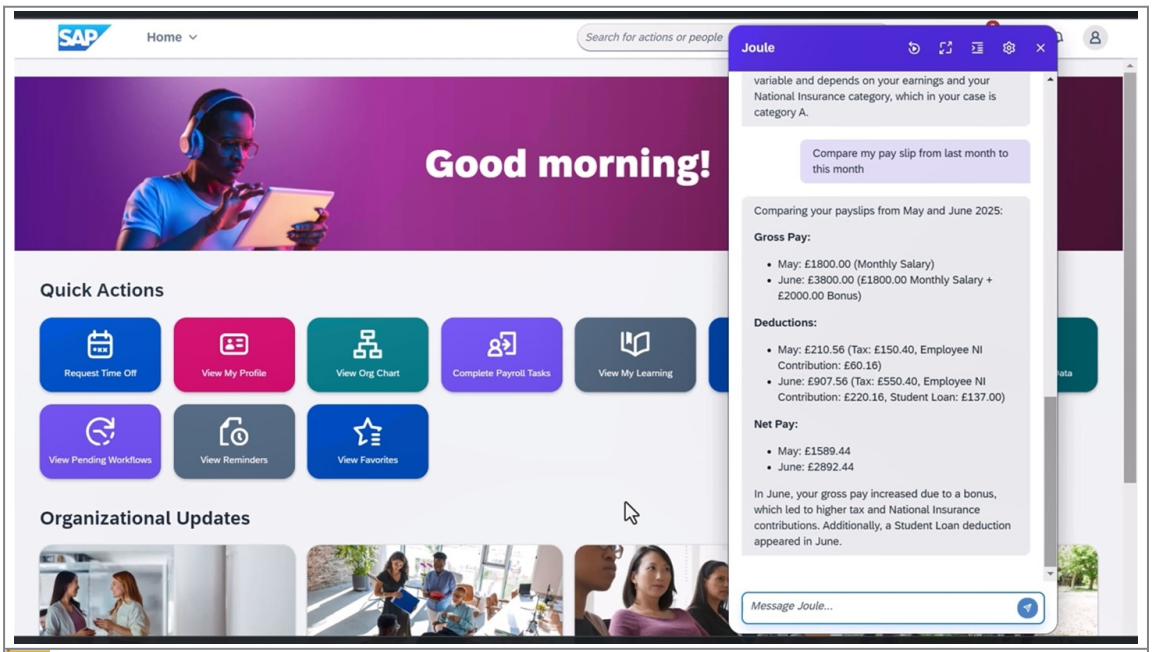

Figure 62: Explain my pay statement feature: Prompt "Compare my payslip from last month to this month"

This screenshot illustrates a dialog with Joule using the Explain My Pay Statement feature. In this example, the user asks Joule to explain a high deduction amount shown on the pay statement.

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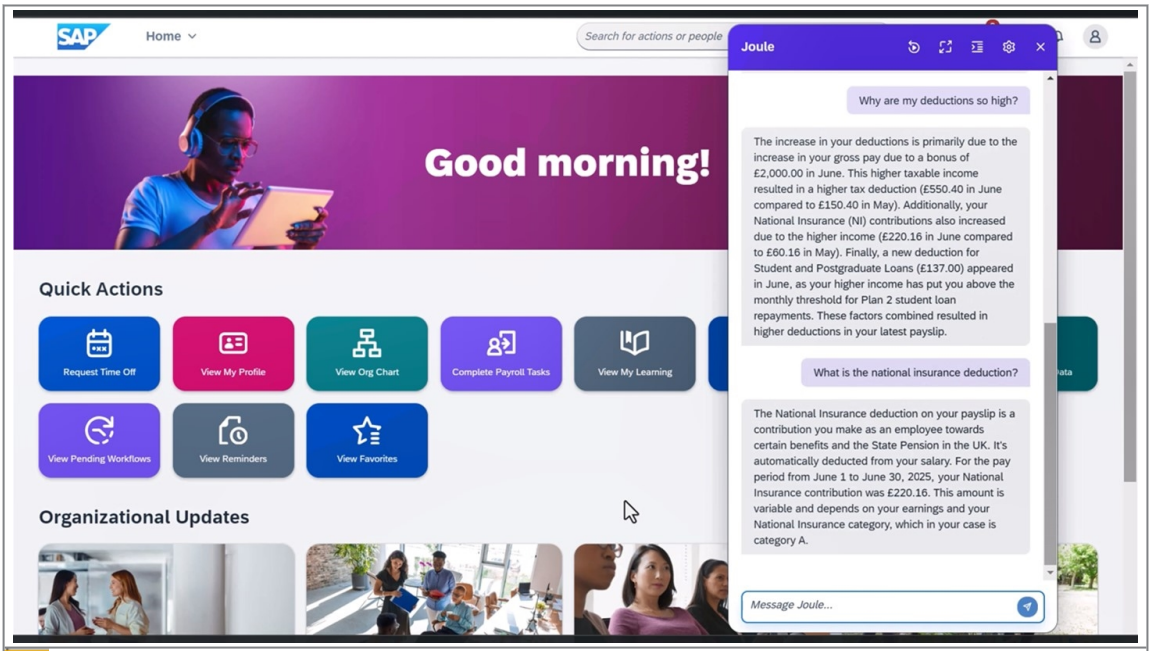

Figure 63: DeductionHigh_Joule.pptx

Joule is also available on mobile devices, enabling employees to access payroll information anytime and anywhere.

Microsoft Teams Integration

Innovation Update

With the integration of SAP SuccessFactors and Microsoft 365, a *View My Pay Statement* Quick Action is available for users to view their payroll information in Microsoft Teams.

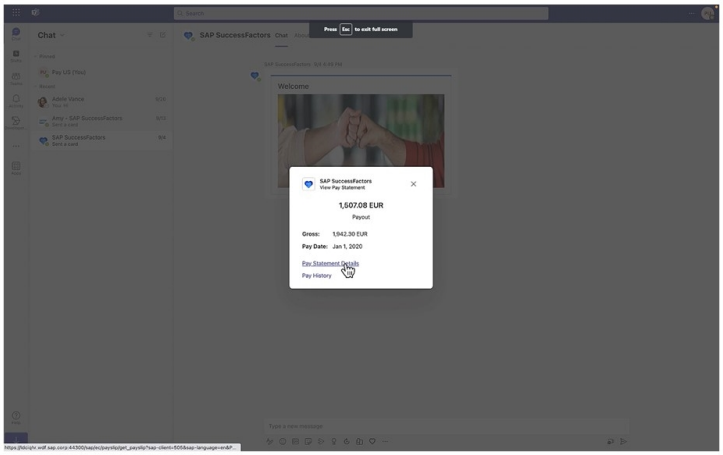

Figure 64: Microsoft Teams Integration

Summary

Payroll Alerts: Payroll managers can review issues, investigate policies, and identify employees with problems.

Payroll Alerts – Assignment:

- Assignment: Managers can assign alerts to administrators using the My Processes interface.

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- Teams: Teams can be created with delegated responsibilities for specific alerts.

Payroll Alerts – Detailed View: Detailed payroll results help in deciding if action is required.

Payroll Alerts – Solution:

- Resolution: Alerts come with a solution for administrators to resolve issues.
- Navigation: Direct navigation to the employee's profile to make necessary changes.

Payroll Schema: Main tool for configuring payroll.

Pay Statement:

- Viewing: Employees can view pay statements post-payroll.
- Key Values: Configurable to show total gross, net payment, employee taxes, etc.
- Joule Integration: SAP Business AI Assistant (Joule) allows conversational access to pay statements and history.
- Natural Language Queries: Use natural language to request specific pay information.
- View My Pay Statement Quick Action in Microsoft Teams for accessing payroll information.

This comprehensive setup ensures payroll managers and administrators can efficiently handle payroll processes, resolve issues, and provide employees with easy access to their pay information.

LESSON SUMMARY

You should now be able to:

- Describe key elements for managing payroll alerts.

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Unit 5
Lesson 3

Reviewing the Decisions Checklist for Managing Payroll

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Review the decisions to be made about payroll activities and alerts before implementation.

Decisions Checklist

Based on the content in this section, please review the list of implementation decisions your company may need to make before implementation begins and discuss them with your stakeholders, project team, and SAP SuccessFactors implementation consultants. In this way, you will be better prepared to begin the implementation.

- Which Payroll Alerts will be run during pre-payroll, production payroll, and mass off-cycle processes?
- What is the detail level provided for each payroll alert? In each detail view, what is shown (Payslip, Pay Component Comparison, Pay Component Period Detail, Audit Report)?
- What is the provided solution for each payroll alert?
- What are the reasons this alert may be acceptable?
- Which Key Performance Indicator (KPI) tiles will be shown during pre-payroll and production payroll processes?
- Will there be steps added to the standard processes? (E.g., Payroll Journal report during production payroll)
- Which Post-Production processes will be included? (E.g., Posting to Financial Accounting & direct deposit)
- Which Payroll Administrators will be allowed to update employee master data while payroll runs?
- Will your Payroll Managers require the configuration of teams for alert assignment?
- What custom calculations are needed?
- What reduction/proration scenarios are needed?
- What payment models are needed?
- What goals and limit pay components are needed?
- Are limits on deductions needed?
- Are percentage-based deductions needed?

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- When an employee gets into Arrears (Where they owe the company money), how should the system handle it?
  - Recoup it all
    - Immediately
    - Over multiple periods
  - Forgive the amounts

Summary

There are several important decisions that must be made before implementation begins. These include: what payroll alerts will be created, information required to troubleshoot, steps in the process and exceptions to standard processes or calculations.

LESSON SUMMARY

You should now be able to:

- Review the decisions to be made about payroll activities and alerts before implementation.

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UNIT 6 Exploring Post-Payroll Integration

Lesson 1

Describing Post-Payroll Integration Process 71

Lesson 2

Reviewing the Decisions Checklist for Exploring Post-Payroll Integration 75

UNIT OBJECTIVES

- Explain main elements from post-payroll process.
- Review the decisions to be made about post-payroll integration before implementation.

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Unit 6
Lesson 1

Describing Post-Payroll Integration Process

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Explain main elements from post-payroll process.

Introduction

In this section, you will learn how SAP SuccessFactors Employee Central Payroll is used for post-payroll processing.

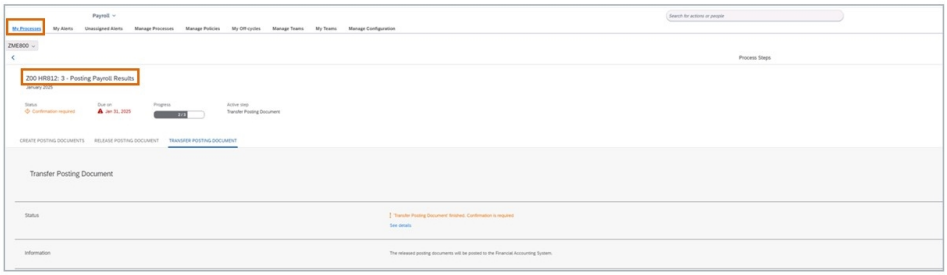

Figure 65: Post-Payroll Processing

Employee Payment Methods

In the SAP SuccessFactors system, every employee must have a main payment method assigned to an employee record. Even if the employee only receives a payroll check, that must be entered into their record.

Employees can have multiple payment methods but only one main payment.

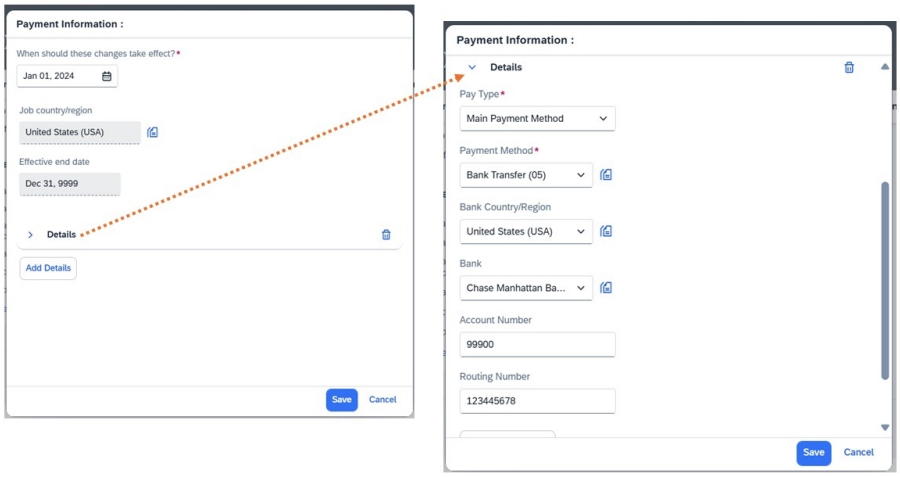

Figure 66: Employee Payment Information

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Employee Cost Center

In the SAP SuccessFactors system, every employee must have a cost center integrated with financial accounting, which is assigned to their employee record to track their personnel expenses.

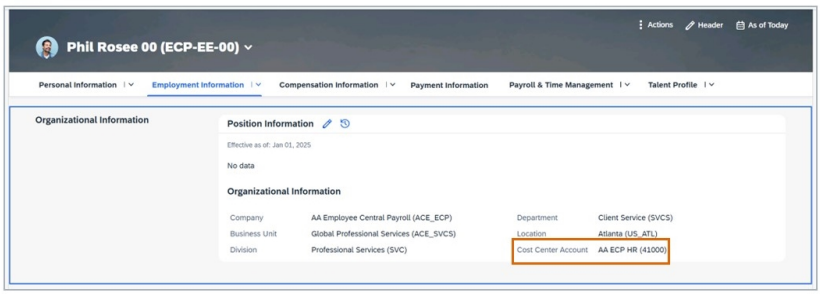

Figure 67: Employee Cost Center

Individual payments can also be associated with an alternate cost center.

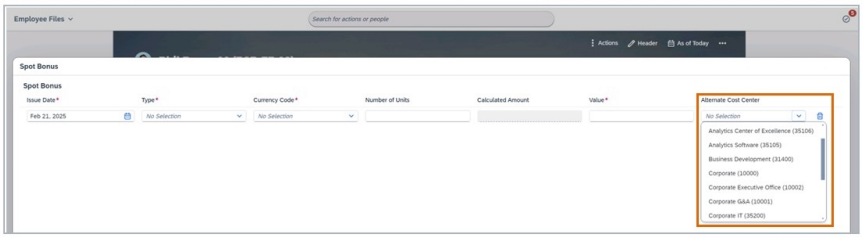

Figure 68: Alternative Cost Center

Pay Component Assignment to General Ledger

In the SAP SuccessFactors system, pay components are indirectly mapped to general ledger accounts via symbolic accounts.

This mapping is relevant for the pay component values and having them in financial accounting.

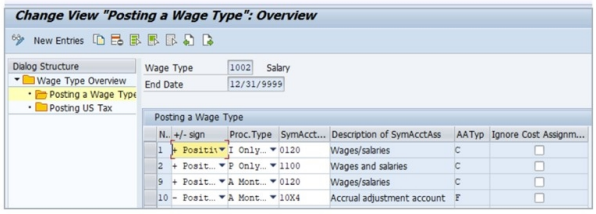

Figure 69: Pay Component Mapping

Figure 70: Automatic Posts - Accounts

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Third-Party Remittance

In the SAP SuccessFactors system, the Third-Party Remittance functionality is used to make vendor payments.

HR Payees are set up and linked to vendors and pay components to take the results calculated in payroll and set up payments to vendors.

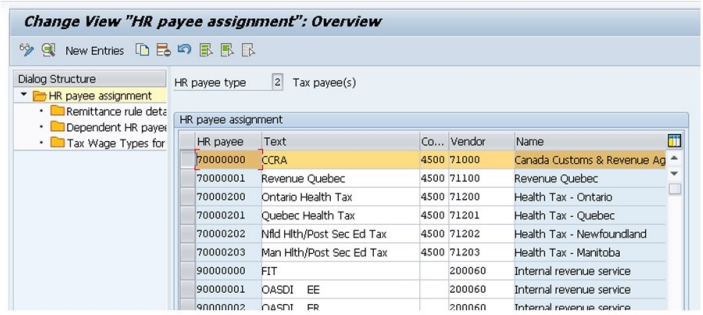

Figure 71: HR Payee Assignment

Summary

Employee Payment Methods:

- Requirement: Each employee must have a main payment method assigned.
- Multiple Methods: Employees can have multiple payment methods, but only one main method.
- Record Entry: Even employees receiving only payroll checks must have this method recorded.

Employee Cost Center:

- Requirement: Each employee must be assigned a cost center integrated with financial accounting.
- Purpose: Tracks personnel expenses.
- Alternate Cost Centers: Individual payments can be associated with an alternate cost center.

Pay Component Assignment to General Ledger:

- Mapping: Pay components are indirectly mapped to general ledger accounts via symbolic accounts.
- Relevance: This mapping is essential for reflecting pay component values in financial accounting.

Third-Party Remittance:

- Functionality: Used to make vendor payments.
- Setup: HR Payees are linked to vendors and pay components.
- Process: Results calculated in payroll are used to set up payments to vendors.

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This systematic approach ensures accurate and efficient post-payroll processing, including employee payments, cost center tracking, general ledger integration, and third-party remittances.

LESSON SUMMARY

You should now be able to:

- Explain main elements from post-payroll process.

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Unit 6
Lesson 2

Reviewing the Decisions Checklist for Exploring Post-Payroll Integration

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Review the decisions to be made about post-payroll integration before implementation.

Decisions Checklist

Based on the content in this section, please review the list of implementation decisions your company may need to make before implementation begins and discuss them with your stakeholders, project team, and SAP SuccessFactors implementation consultants. In this way, you will be better prepared to begin the implementation.

- What payment methods will be used to pay employees? (e.g., Direct Deposit and Payroll Check)
- How many bank accounts are employees allowed to have?
- What is the mapping between our payroll pay components and the Financial Accounting (FI) General Ledger accounts?
- What cost centers will we need to have available in the system?
- Will we be paying vendors using the Third-Party Remittance functionality?*

  *Not available in all countries

Summary

There are several important decisions that must be made before implementation begins. These include: payment methods, required employee banking accounts and cost centers and steps in the process to pay vendors.

LESSON SUMMARY

You should now be able to:

- Review the decisions to be made about post-payroll integration before implementation.

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UNIT 7 Planning Next Steps

Lesson 1

Reviewing Next Steps 79

UNIT OBJECTIVES

- Explore the steps to take after working through the PTO.

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Unit 7
Lesson 1

Reviewing Next Steps

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Explore the steps to take after working through the PTO.

Next Steps

Now that you have learned about the basic functionality of your SAP SuccessFactors solution, it is recommended to review and compile your answers to the decisions checklist(s) and the suggested items listed to prepare for the next steps in the implementation process. Be sure to annotate key dates, contact information, and any questions you want to ask your SAP SuccessFactors implementation consultant. This will help you make sound decisions as you work toward your business execution needs.

Helpful Resources

For more information about SAP SuccessFactors, refer to these resources:

- SAP SuccessFactors Help Portal: Find product-specific documentation (admin and implementation guides, and more)
- SAP SuccessFactors Release Information: Access the latest release resources (documentation, Q&A sessions, and more)
- SAP SuccessFactors Community: Explore SAP SuccessFactors latest updates, product, and release information, engage with other customers and experts, find upcoming events, explore training options, and more
- SAP SuccessFactors Training & Expert Accreditation (SFX): Explore and access customer training options and SXF accreditation
- SAP Training Shop: View the upcoming training course schedules, digital learning options, SAP Certification, and more
- SAP Roadmap Explorer: Discover the planned SAP SuccessFactors release innovations
- SAP Architecture Leading Practices: Access recommended configuration decisions and guidance related to SAP SuccessFactors implementations
- SAP Implementation Design Principles: View structured guidance addressing challenging customer requirements and questions occurring during the design and implementation phases of the project
- Embedded Launch Activities (EmLA) for SAP SuccessFactors: Help to enable and prepare your project team for your cloud deployment

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- Regulatory Change Manager: The go-to resource to get details and the status of relevant regulatory changes for a country
- Regional Collaboration Workzone Groups: Join SAP's regional Work Zone groups to share insights and stay current on localization topics. Connect with users, experts, and peers in your region. Groups are closed and require authentication for SAP customers, partners, and employees.

Downloadable Training Course PDFs

To download PDF versions of any Project Team Orientation (PTO) or Administration (Admin) training courses, please access the direct links in this guide:

SAP SuccessFactors HCM Downloadable Training Guide.

Summary

- Compile your decisions checklist, key dates, and questions to prepare for implementation and consulting sessions.
- Use the SAP SuccessFactors Help Portal and Community for documentation, updates, and expert engagement.
- Explore training options, certifications, and accreditation via SAP Training Shop and SuccessFactors Training & Expert Accreditation (SFX).
- Leverage resources like SAP Roadmap Explorer and Design Principles for configuration guidance and release innovations.
- Access region-specific Workzone groups and Regulatory Change Manager for localization and compliance updates.

LESSON SUMMARY

You should now be able to:

- Explore the steps to take after working through the PTO.

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Glossary

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