SAP SuccessFactors

**Implementation Guide | PUBLIC**
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# Implementing and Managing Workflows



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# Content

# 1 Workflows in SAP SuccessFactors Employee Central

Well-designed workflows can automate business processes and ensure data quality. With SAP SuccessFactors Employee Central, you have the full capability of automated approval process that controls changes to employee and corporate data.

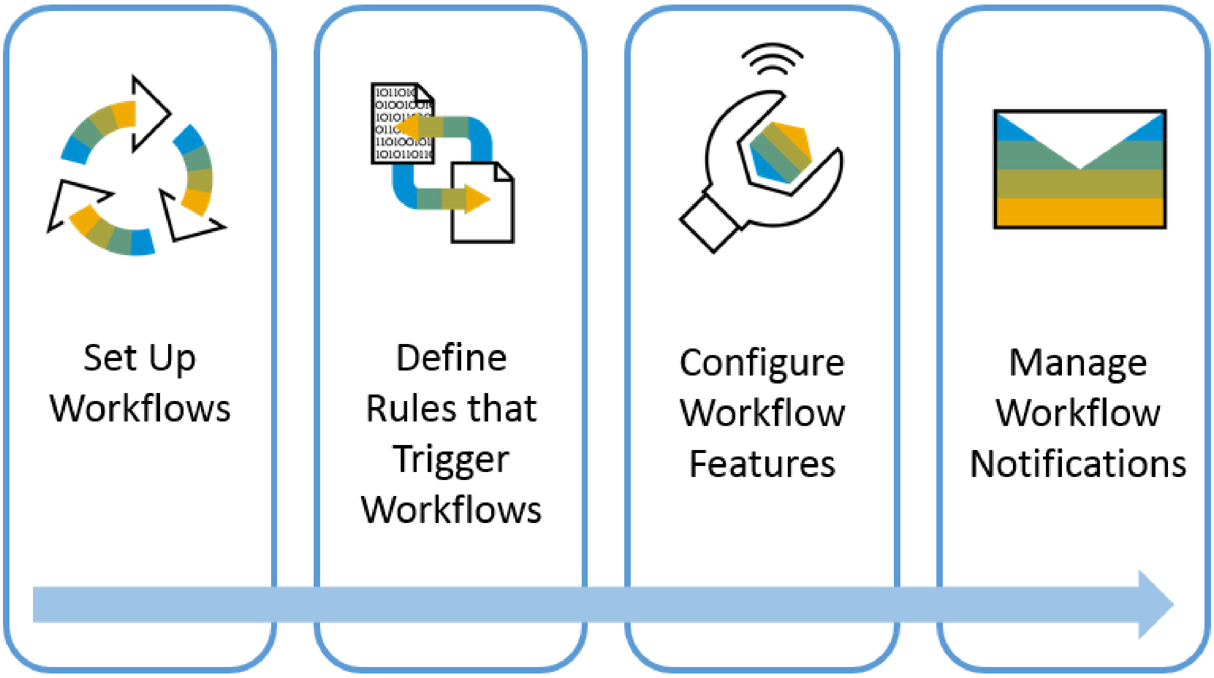
For example, you can set up a workflow to manage changes to employees' compensation information. When a manager changes compensation data of an employee, the corresponding approver receives a request to review and approve the change. Only when it's approved, will the change take effect for the employee.

You may also want to set up workflows for other data changes such as leave requests and promotion. This guide provides information on implementation and administration of workflows for both Employee Central data and Metadata Framework (MDF) generic data.

To configure a workflow means to define the following aspects of it:

- Approvers
- Triggering of workflows
- Notifications

The following diagram illustrates how you implement and configure workflows and relevant notifications. Hover over a step for a short description of it. Click to learn more about it.




- Triggering Workflows [page 37]

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Supported Workflows [page 7]

This list shows where workflows are supported across the system.

## 1.1 Supported Workflows

This list shows where workflows are supported across the system.

Table 1: Supported Workflows

| Transaction | Base Object for Business Rule | Assign Workflow at | Workflow Request Type | Workflow Title | Comment |
|---|---|---|---|---|---|
| ESS: Personal Info | Personal Information<br><br>Personal Information Model | personalInfo | Change Personal Info | {model name} change | |
| ESS: Home /business address | Addresses<br><br>Addresses Model | homeAddress | Add Address | {model name} change | |
| ESS: National ID | National ID Information<br><br>National ID Information Model | nationalIdCard | Add National ID | {model name} change | |
| ESS: Work Permit Info | Work Permit Info<br><br>Work Permit Info Model | workPermitInfo | Add Work Permit Info | {model name} change | No in-flight changes supported |
| ESS: Dependents | Dependents<br><br>Dependents Model | personRelationshipInfo | Change Dependent Details | {model name} change | No in-flight changes supported |
| MSS: Employment Details | Employment Information<br><br>Employment Information Model | employmentInfo | Change Employee Details | {model name} change | |
| MSS: Job Information | Job Information<br><br>Job Information Model | jobInfo | Change Job | Event reason selected by user for this transaction | Incl. Position and Organizational Information |

| Transaction | Base Object for Business Rule | Assign Workflow at | Workflow Request Type | Workflow Title | Comment |
|---|---|---|---|---|---|
| MSS: Job Relationship | Job Relationship<br>Job Relationship Model | jobRelationship | Change Job Relationship | Event reason selected by user for this transaction | |
| MSS: Pay Component Non Recurring | Spot Bonus<br>Spot Bonus Model | payComponentNonRecurring | Add Non-Recurring Pay Component | Pay Component FO name used in the transaction | Spot bonus<br>For example, a shift allowance for Alex Anderson |
| MSS: Comp Info | Compensation Information<br>Compensation Information Model<br>OR<br>Compensation<br>Compensation Model | compInfo<br>OR<br>payComponentRecurring | Add Recurring Pay Component | Event reason selected by user for this transaction | |
| Transfer | Job Information<br>Job Information Model | jobinfo | Change Job | Event reason selected by user for this transaction | Same as job change |
| New Hire | Employee Information<br>Employee Information Model | jobInfo<br>employmentInfo | New Hire | Event reason selected by user for this transaction | |
| Rehire | Employee Information<br>Employee Information Model | jobInfo<br>employmentInfo | Rehire | Event reason selected by user for this transaction | |
| Internal Hire | Employee Information<br>Employee Information Model | jobInfo | Internal Hire | Event reason selected by user for this transaction | |

| Transaction | Base Object for Business Rule | Assign Workflow at | Workflow Request Type | Workflow Title | Comment |
|---|---|---|---|---|---|
| Termination | Job Information<br>Job Information Model<br>OR<br>Employee Information<br>Employee Information Model | jobInfo | Terminate | Event reason selected by user for this transaction | |
| Global Assignment | Job Information<br>Job Information Model | jobInfo | Add/Edit/End/Delete Global Assignment | {model name} change | |
| Pension Payout | Job Information<br>Job Information Model | jobInfo | Add/Edit/End/Delete Pension Payout | {model name} change | |
| Concurrent Employment | Job Information<br>Job Information Model | jobInfo | Add/Edit/End/Delete Concurrent Employment | {model name} change | |
| MDF objects | Same Base Object as the PARENT object | Respective MDF object, like work orders, positions management, Payment Information V3 (MDF), dismissal protection, advances, deductions, alternative cost distribution | Manage Generic Objects | Change Generic Object Actions | Added to the object in *Configure Object Definition*<br>See Note for more information |
| Foundation objects | Same Base Object as the Foundation Object | Respective FO object | Change Foundation Object | Change Foundation Object | Added to the object using the Corporate Data Model<br>No in-flight changes supported, no resubmit |

**i Note**

**MDF Workflows**

- We support Update if pendingData = Yes.
- We do not support Send Back, Resubmit, or Update if pendingData = No.
- We support Decline if pendingData = No.
- Deleting an MDF object with pendingData = No will not trigger any workflow.

Note that Update, Send Back, Resubmit, and Decline actions, there are corresponding buttons on the *Workflow Details* page.

i Note

**Country/Region Specifics**

For jobInfo, homeAddressInfo, and nationalIdCard, you can assign the rule either in the Succession Data Model or the Country Specific Succession Data Model. For example, you can trigger a workflow just for Home Address changes in USA and the rule trigger can be put under the homeAddress config in the Country Specific Succession Data Model.

## Not Supported Workflows

Workflows are not supported for the following:

- Biographical Information
- Citizenship info
- Emergency Contact
- Email Information
- Phone Information
- Social Accounts Information
- Photo

**Parent topic:** Workflows in SAP SuccessFactors Employee Central [page 6]

# 2 Getting Started

## 2.1 Enabling New Home Page

To use to-do tiles for alert management and easily access pending workflow requests, enable the new home page.

### Context

Managing your workflow requires the following to-do tiles:

- **Approve Requests**
  Where users can access workflow requests that await their response.
- **Take Action**
  Where users can review alerts. For example an alert can be sent to HR when a work permit of an employee is about to expire.

To be able to use these tiles, enable the new home page:

- If the system is already up and running and the older version of the home page is being used, admins can go to *Admin Center* > *Upgrade Center* and upgrade to the new home page.
- If you are implementing a new instance, in Provisioning, go to *Company Settings*, and enable *Homepage v3*.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

### Related Information

Import Employee Data
Importing MDF Data
Adding Security

## 2.2 Prerequisite Checklists

To ensure that workflows work as expected and notifications are sent successfully, complete all the following prerequisite tasks.

### Technical Prerequisites

The technical prerequisites include switches you must turn on, RBPs you must obtain, and code snippets that must be inserted in the corporate data model. These are the requirements all customers must meet in order to use Workflows in their approval processes.

- Select the option *Employee Central Foundation Objects* in Provisioning.

  > **→ Remember**
  >
  > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

- Enable the workflow FO in the corporate data model. This means you have a code snippet like the following in the XML file:

  **Sample Code**

```
...
  <hris-element id="wfConfig">
    <label>Workflow Configuration</label>
    <hris-field max-length="32" id="externalCode" visibility="both"
required="true">
      <label>Workflow ID</label>
    </hris-field>
    <hris-field max-length="32" id="is-delegate-supported"
visibility="both">
      <label>Is Delegate Supported</label>
    </hris-field>
    <hris-field max-length="32" id="escalation" visibility="both">
      <label>Escalation</label>
    </hris-field>
    <hris-field max-length="32" id="name" visibility="both">
      <label>Name</label>
    </hris-field>
    <hris-field id="remind-indays" visibility="both">
      <label>Remind In Days</label>
    </hris-field>
    <hris-field max-length="128" id="description" visibility="both">
      <label>Description</label>
    </hris-field>
    <hris-field id="is-cc-link-to-approval-page" visibility="both">
      <label>CC link to approval page</label>
    </hris-field>
    <hris-field max-length="45" id="custom-string1" visibility="none">
      <label>Custom String1</label>
    </hris-field>
    <hris-field max-length="45" id="custom-string2" visibility="none">
      <label>Custom String2</label>
    </hris-field>
    <hris-field max-length="45" id="custom-string3" visibility="none">
```

```
      <label>Custom String3</label>
    </hris-field>
    <hris-field max-length="45" id="custom-string4" visibility="none">
      <label>Custom String4</label>
    </hris-field>
    <hris-field max-length="45" id="custom-string5" visibility="none">
      <label>Custom String5</label>
    </hris-field>
    <search-criteria>
      <search-field id="externalCode" />
      <search-field id="name" />
    </search-criteria>
  </hris-element>
  <hris-element id="wfConfigStep">
  </hris-element>
  <hris-element id="wfStepApprover">
    <hris-field max-length="32" id="approverType" visibility="both"
required="true">
      <label>Approver Type</label>
    </hris-field>
    <hris-field id="approverRole" visibility="both" required="true">
      <label>Approver Role</label>
    </hris-field>
    <hris-field id="approver" visibility="both" required="true">
      <label>Dynamic Role's External Code</label>
    </hris-field>
    <hris-field id="actionType" visibility="both">
      <label>Edit Transaction</label>
    </hris-field>
    <hris-field max-length="32" id="context" visibility="both">
      <label>Context</label>
    </hris-field>
    <hris-field id="autoApproveInDays" visibility="both">
      <label>Auto Approve in Days</label>
    </hris-field>
  </hris-element>
  <hris-element id="wfConfigContributor">
    <label>Workflow Contributer</label>
    <hris-field max-length="32" id="actorType" visibility="both"
required="true">
      <label>Contributor Type</label>
    </hris-field>
    <hris-field id="actorRole" visibility="both" required="true">
      <label>Contributor</label>
    </hris-field>
  </hris-element>
  <hris-element id="wfConfigCC">
    <label>CC Role</label>
    <hris-field max-length="32" id="actorType" visibility="both"
required="true">
      <label>CC Role Type</label>
    </hris-field>
    <hris-field id="actorRole" visibility="both" required="true">
      <label>CC Role</label>
    </hris-field>
  </hris-element>
...
```

- Grant these permissions to users who need to set up workflow configurations: *Manage Foundation Objects* > *Manage Organization, Pay and Job Structures*; and *Manage Foundation Objects Types* > *Workflow*
- Select the option *Enable Generic Objects — requires "Enable the Attachment Manager"* in Provisioning.
- Select the option *Effective Dated Data Platform – required "Enable Generic Objects" and "Enable the Attachment Manager"* in Provisioning.

**Limitation**: In a non-Employee Central environment (that is, customers haven't acquired a separate license for Employee Central), when user A uses the proxy feature to access user B's MDF or other non-Employee Central-based workflows, user A can view and respond to the workflows on the home page or through the *To-do* panel, but cannot open the *Workflow Details* page.

## General Prerequisites

The general prerequisites are additional requirements customers have to meet in order to receive notifications, maintain Country MDF objects, and use other features of Workflows.

| Check Item | Task |
| --- | --- |
| Email Settings | Workflow and alert notifications are sent to employees through emails. So, maintain valid email information for the employees by doing either of the following:<br>• Include email information during user import through *Admin Center* > *Import Employee Data*.<br>• Add email information for individual users on People Profile. |
| Single Sender Settings | If you've maintained a single sender through Provisioning for all system email notifications, make sure that customers perform necessary security adjustments on their receiving email server end, so that these emails are received and delivered to end users.<br><br>You can access the single sender settings in Provisioning through *Company Settings* > *Mail Preference* > *Single Sender*. If you've enabled a single sender, all system email notifications are sent from that email account instead of the default accounts (system@successfactors.eu or system@successfactors.com). |
| Country MDF Object | Make sure that you have maintained Country MDF objects with the ISO country codes. For example, the two-character code and numeric code for the United States is US and 840 respectively. To maintain the Country objects in one go, you can import the country objects through *Admin Center* > *Import and Export User Data*. |

| Check Item | Task |
| --- | --- |
| MDF Generic Object Definition | To make sure that the system can readily process alert messages, auto delegation, escalation, and email notifications, change the *Secure* attribute to *No* in definitions of the following MDF generic objects:<br>• Alert Message<br>• Auto Delegate Config<br>• Auto Delegate Detail<br>• Escalation<br>• Workflow Email Configuration<br>You can access the object definitions through *Admin Center* > *Configure Object Definitions*. |

## 2.3 Role-Based Permissions for Workflows

By assigning them right role-based permissions (RBP) respectively, you can allow admins to set up and configure workflows and users to approve workflow requests.

RBP gives you flexibility to manage permissions based on roles. Users who change roles or positions within the organization automatically lose or inherit permissions. For example, you can grant some permissions (such as setting up and configuring workflows) to HR admins only, but other permissions (like managing and approving workflows) to both HR admins and managers.

The most basic RBP is *Workflow*, but you need other RBPs to take advantage of more sophisticated features and tools available for workflows. Filter this role-based permission list to learn more about workflows-related permissions: List of Role-Based Permissions.

# 3 Setting Up Workflows

Workflows are managed as foundation objects. In each workflow foundation object, you define approval steps, approvers, and which people are notified when updates happen along the approval process and when the entire workflow is completed.

You can either create individual workflow foundation objects or import multiple workflows into the system from a CSV file.

## Related Information

Workflow Participation [page 16]
Creating an Individual Workflow [page 24]
Importing Multiple Workflow Objects with a CSV File [page 33]

## 3.1 Workflow Participation

People can participate in a workflow as different roles and engage in activities allowed for their respective roles, including providing comments, approving workflows, and getting notified when the workflow is completed.

A workflow can have up to three participating roles:

- **Approvers**
  Who approve, send back, post comments on, and reject (for some MDF workflows) workflows. If admins have enabled relevant features, they can also assign workflow requests to themselves or delegate workflows.
- **Contributors**
  Who can provide comments that may help the approvers make a decision. Contributors are also notified in email of any progress or changes during the entire workflow.
- **CC Roles**
  Who are notified when the workflow is completed. A CC role can be assigned to any individual other than approvers and contributors, for example, someone who can follow up with a data change.
  Stakeholders designated as CC roles are informed of important data changes that have been saved without triggering an approval workflow. For example, when there is no resolved user for a step approver, a data change can take effect though no workflow will be triggered, and the CC roles specified in the workflow object are still notified of such data change.

You can use a variety of supported participating types to define approvers, contributors, or CC roles. And you can define them by position, by reporting line, or dynamically based on attributes of the changed data object.

For details about how approvers, contributors, and CC roles are determined according to participating types, see the following table:

Table 2: Participating Types

<table>
<tr><th>Participating Type</th><th>Applicable Participating Roles</th><th>How Individual Participants are Determined</th></tr>
<tr><td>Role</td><td>All</td><td>The system determines the participants by the reporting line. They can be employees themselves or their managers, matrix managers, HR representatives, and so on.<br><br>Use the Relationship to Approver field to specify whether the role is resolved based on the workflow subject user (Employee) or the workflow initiator (Initiator).<br><br>For example, a step approver can be the manager of the workflow subject user or the manager of the workflow initiator.<br><br>i Note<br><br>The following approver roles are available only when you choose Employee as the Relationship to Approver value:<ul><li>Employee HR</li><li>Matrix Manager</li><li>Custom Manager</li><li>Second Manager</li><li>Additional Manager</li></ul></td></tr>
<tr><td>Dynamic Group</td><td>All</td><td>The participants are a group of users that you define based on their job or personal information. When a workflow is addressed to a dynamic group, all individuals within this group receive approval requests, comment requests, or workflow completion notifications.</td></tr>
</table>

| Participating Type | Applicable Participating Roles | How Individual Participants are Determined |
|---|---|---|
| Dynamic Role | All | The participants are dynamically determined according to the event reason for a data change or certain foundation data of the subject user.<br><br>Dynamic roles, which can be employees, positions, or dynamic groups, are created and assigned according to certain foundation objects, such as job classification, department, pay grade, and event reason. For example, if several employees are under a specific job classification and there are data changes, the workflow requests or notifications are sent to all individuals or positions included in that dynamic role. |
| Position | All | The workflow request goes to all the individuals holding a selected position.<br><br>**Note**<br>This option is available only when you use position management of Employee Central. |

<table>
<thead>
<tr><th>Participating Type</th><th>Applicable Participating Roles</th><th>How Individual Participants are Determined</th></tr>
</thead>
<tbody>
<tr><td>Position Relationship</td><td>All</td><td>The workflow request goes out to participants under a selected position hierarchy. May include:<ul><li>The position itself</li><li>The next position-level, reporting, or management relationship to the selected position.</li></ul>The position can be that of the workflow subject user or the workflow initiator, which you can select from the Relationship to Approver dropdown list:<ul><li>Employee Position<br>The subject user's position</li><li>Initiator Position<br>The workflow initiator's position</li><li>Position<br>The position MDF object, relevant only when the workflow is assigned to the position object. When creating a new position, select Position, instead of Employee Position, as Relationship to Approver.</li></ul>For example, the step approver or contributor can be either the subject user's manager or the workflow initiator's manager.<br><br>i Note<br>This option is available only when you use position management of Employee Central.</td></tr>
<tr><td>Person</td><td>Contributors and CC Roles only</td><td>A specific individual.</td></tr>
<tr><td>External e-mail</td><td>CC Roles only</td><td>The external e-mail address of the individual to be informed when the workflow is completed.</td></tr>
</tbody>
</table>

Creating a Dynamic Group [page 20]

You can create a group of users based on certain personal and job information. Employees, dynamically included into the group, can assume various participating roles such as workflow approvers, contributors, and CC roles.

Creating a Dynamic Role [page 21]

With dynamic roles, you can flexibly assign different users, positions, or dynamic groups as workflow approvers, contributors, and CC roles according to certain foundation data of the subject user or MDF position object. So, for employees or positions of a particular job classification, or for a data change to a particular event reason, the workflow approval requests or notifications are sent to the users or positions defined in the dynamic role.

## 3.1.1 Creating a Dynamic Group

You can create a group of users based on certain personal and job information. Employees, dynamically included into the group, can assume various participating roles such as workflow approvers, contributors, and CC roles.

### Context

When a dynamic group is used on a workflow, approval or commenting requests are sent to all members of the group. However, only one of the members is expected to take action, which helps ensure efficiency of workflow processing. As soon as a member approves the workflow or provides comments for the workflow at one of the steps, the workflow will proceed to the next step and the pending requests for other members are automatically removed.

Dynamic groups can also be assigned to foundation objects to create dynamic roles.

### Procedure

1. Go to *Admin Center* > *Manage Workflow Groups* > *Create New Group*.
2. Enter a name for the group.
3. Define pools to include people into the group.

   A people pool contains one or more persons that you can include in (or exclude from) a dynamic group. You can have multiple pools in one dynamic group.

   a. Choose a category from the dropdown list, for example, "City".
   b. Define a criterion for the selected category, for example, "City = New York".
   c. **Optional:**Add more categories and define criteria if necessary.

      > → Tip
      >
      > If you defined criteria for multiple categories within one pool, only the people who meet all these criteria will be considered as valid candidates of the pool who can act on a workflow.

   > → Tip
   >
   > If a resolved dynamic group has more than 1,000 individuals, you won't be able to see it in the *Approver Role*, *Contributor*, or *CC Role* dropdown list when editing a workflow step's configuration. Consider removing members from it.

4. **Optional:** Define pools to exclude people from the group.

   Likewise, you can create exclusion criteria to narrow down members in the group you just created.
5. Save your changes.

## Results

The group has been created and you can use it in workflow configuration as approvers, contributors, or CC roles. The group is also available for dynamic role definition. If a workflow step has a dynamic group as its approver and there are fewer than five people in the group, then all the group members will have their names shown in the workflow confirmation dialog; if there are five or more, only the dynamic group's name is shown. The following screenshot shows that the approver for Step 2 is a dynamic group that has three members.

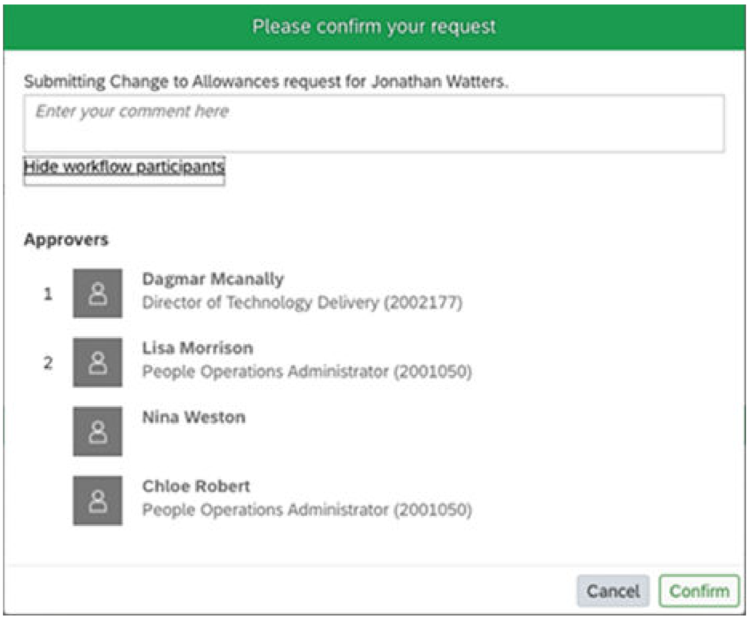



Figure 1: Dynamic Group with Three Members

**Task overview:** Workflow Participation [page 16]

## Related Information

Creating a Dynamic Role [page 21]

# 3.1.2 Creating a Dynamic Role

With dynamic roles, you can flexibly assign different users, positions, or dynamic groups as workflow approvers, contributors, and CC roles according to certain foundation data of the subject user or MDF position object. So, for employees or positions of a particular job classification, or for a data change to a particular event reason, the workflow approval requests or notifications are sent to the users or positions defined in the dynamic role.

## Prerequisites

By default, the system uses the job information of the subject user to determine the assignment of a dynamic role. To enable the MDF position as the other base object, go to the Corporate Data Model and change the Base Object field settings so that it's visible on the dynamic role creation page. For details, see the following setting:

```
<hris-element id="dynamicRole">
...
<hris-field max-length="128" id="baseObjectType" visibility="both">
      <label>Base Object</label>
...
</hris-element>
```

The corporate data model can be maintained using the Import/Export Corporate Data Model tool.

## Context

The dynamic role is created and assigned according to certain foundation objects, such as job classification, department, pay grade, and event reason. By selecting a base object for the role, you specify how the system determines the approver assignment, either by the job information or the position information of the subject users.

> → Recommendation
>
> Use position-based dynamic roles only in workflows for the MDF Position objects.

Dynamic roles can be defined with positions. Make sure to update the dynamic role assignment when there are significant changes to the positions used in the role. For example, you have moved a position from US to Canada. If this position is still used in a dynamic role for US workflows, the relevant approval requests regarding employees in US are still sent to the incumbent of this position who is based in Canada.

## Procedure

1. Go to *Admin Center* > *Manage Organization, Pay and Job Structures* > *Create New* and select *Dynamic Role*.
2. Specify a dynamic role ID, name, and description.
3. (Optional) Select the base object for the dynamic role:
   - *Job Info*
     The system determines the approver assignment based on the job information of the subject user. Use it in workflows for user-based MDF generic objects (such as Time Off or Time Sheet workflows) or

workflows for Employee Central objects. In workflows for other objects, such as migrated foundation object workflow, because there is no subject user involved, the system uses the job information of the workflow initiator to determine the dynamic role assignment.

- *Position*
  The system determines the approver assignment based on the position information of the subject user. Only use it in workflows for MDF position objects, and the system uses the changed position information to determine the dynamic role assignment.

If you haven't enabled the *Base Object* field, the system by default uses the job information as the base object for the dynamic role.

4. In the *Dynamic Role Assignment* section, define how you want to assign approvers, contributors, or recipients of completion notifications and whom (users, positions, or dynamic groups) to include in the dynamic role:
   1. Specify a foundation object as the assignment criterion. You can also specify multiple ones to be more accurate with the assignment. For example, use both the legal entity and pay grade objects to define the assignment for subject employees who belong to legal entity A and whose pay grade is 7.
   2. Select an approver type (person, position, or dynamic group) and specify a corresponding value for this approver type.

      > i Note
      >
      > Although it says approvers, dynamic roles can also be used as workflow contributors and recipients of completion notifications.

   3. Create more assignments if necessary.

   You can assign a different approver for each of your legal entities, so that approvers can be determined based on the legal entity of the workflow subject user.
5. Save the dynamic role.

## Results

The dynamic role has been created, and it is available for workflow setup.

**Task overview:** Workflow Participation [page 16]

## Related Information

Creating a Dynamic Group [page 20]

## 3.2 Creating Workflows

### 3.2.1 Creating an Individual Workflow

Workflows are managed as foundation objects (FOs). For each workflow, you can specify step approvers, process, whether delegation and escalation are supported, and more.

#### Prerequisites

You have role-based permission to *Manage Foundation Object Types*. For more information, see List of Role-Based Permissions.

#### Procedure

1. Go to *Admin Center* > *Manage Organization, Pay and Job Structures* and choose to create a new workflow.

   To change an existing workflow, use *Search* to find the workflow and then under *Take Action* choose *Make Correction*.
2. Enter a workflow ID and name.

   Also, you might want to add a description that explains why this workflow is created.
3. Specify the following general attributes for this workflow:

   > **i Note**
   >
   > If you modify attributes (such as Respect Permission) about a workflow FO, its steps, or its participants after it was created, the workflow instances already triggered before your modification are not affected. The modification will only apply to new workflow instances.

| Attribute | Description |
|---|---|
| *Remind in Days* | Specifies how many days elapse before approvers are reminded to act on a workflow step that has reached them. For example, you can enter "2" and, if approvers haven't responded to the workflow request after two days, they're sent a reminder. If approvers do nothing or respond by only leaving a comment instead of approving or rejecting the step, a second reminder will be sent out two days later.<br><br>→ **Remember**<br><br>You need to create a recurring job that regularly polls all workflows and, when the *Remind in Days* condition is satisfied, sends out reminders. In creating this job, you can define another *Remind in Days* parameter. See Creating a Recurring Job to Send Batch Reminders About Stalled Workflows [page 64].<br><br>If you leave the *Remind in Days* field empty on the workflow configuration page, Employee Central will validate what's been entered for the recurring job to determine when to remind the approvers. If it's defined in both places, the value entered for the job prevails; if it's not defined in either place, then no reminders will be sent for the workflows involved. |
| *Is Delegate Supported* | Specifies whether approvers can delegate the workflow to someone else. |

| Attribute | Description |
|---|---|
| *Alternate Workflow* | **Note**<br>The Alternate Workflow setting isn't supported on Centralized services yet.<br>If you're new to creating alternate workflows, we recommend using business rules instead.<br>You can designate an alternate workflow that will be triggered when an entity has a future record.<br>For example, an employee has two job information records, one for September 1, 2016 to August 31, 2018 and the other for September 1, 2018 to now.<br>If there’s an alternate workflow, when the employee’s job information is changed (through editing on UI or import) and a new record with an effective start date earlier than September 1, 2018 gets created, the alternate workflow will be triggered. This is because a "future" record exists from the perspective of this data change. However, if the data change has an effective start date later than September 1 of 2018, the original workflow will be triggered, because there's no future record at the time when this data change takes effect.<br>You can use an alternate workflow to include more approvers in a workflow process and take care of potential conflicts caused by future dated records. For example, you create an alternate workflow to ensure both the current and future manager of an employee approve a critical job information change. |
| *Escalation* | Assigns to the workflow an escalation path you've created.<br>**→ Tip**<br>Escalation won't happen if you've enabled the auto-approval feature. |

| Attribute | Description |
|---|---|
| *Redirect CC Users to Workflow Approval Page* | Specifies whether the CC roles are redirected to the workflow details page (also known as "workflow approval page") or FO/People Profile page when clicking links in a notification they receive:<br>• *Yes*<br>Redirect to the workflow details page. Note that for workflows having only CC roles and no approvers, setting this attribute to *Yes* is no different from setting it to *No*.<br>• *No*<br>  • For foundation object (FO) workflows, the CC roles are redirected to the foundation object page.<br>  • For non-user generic object workflows, they're redirected to either of the following two pages:<br>    • The *Manage Data* page (for Department-related and similar workflows), where they can quickly review the corresponding data changes.<br>    • The *Manage Positions* page (for Position-related workflows), where they can efficiently perform next steps.<br>  • For any other workflows, they're redirected to the *People Profile* page of the subject user. |

4. You can define the specific steps, or the "process", the workflow must have. For each step, specify the following parameters:

| Setting | Description |
|---|---|
| *Approver Type* **and** *Approver Role* | Determine the exact approvers of this current step. For more information about workflow participant types including approvers, see Workflow Participation [page 16].<br><br>**i Note**<br>When you've selected "Role" as the approver type, you can select one role from the predefined *Approver Role* list. Adding a new role to the list by creating a customized job relation type isn't supported. |
| *Context* | Determines the approver, based on attributes of the subject employee or on data before or after the change.<br><br>For example, when an employee's position changes, the workflow may require approval from the manager of the employee. By specifying *Context*, you can determine which manager has to approve the request:<br>• *Source*<br>The manager before the change<br>• *Target*<br>The new manager after the change |

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td></td><td>Alternatively, you can create two steps to include approvals from both of them: one step with the current manager as the approver, and the other with the new manager as the approver.<br><br>i Note<br>If a data change doesn't involve a manager change, despite that you have defined different approvers in two separate steps, by selecting Source and Target respectively, the approval requests will be sent to the same person. In the Workflow Participants dialog box, the two steps are combined, showing only one approver.<br><br>i Note<br>Under any of the following conditions, the manager field won't be validated and no target manager will be identified. The workflow will be routed to the current manager (the source manager) for the employee, regardless of what's been selected in the Context field for your workflow object.<br>• The data change doesn't involve a change of managers.<br>• The change occurs on a future effective date. For example, if a change of managers is effective on a future date and a workflow not involving a manager change is triggered today, then the current manager will be requested for approval.<br>• There are two different transactions with the same effective date, but only one involves a manager change as a separate transaction.<br><br>Source and Target can mean opposite things in different Global Assignment related workflows:<br>• For workflows where a global assignment is being added or edited, Source is the home manager and Target is the host manager.<br>• For workflows where a global assignment is being ended: Source is the host manager and Target is the home manager.<br><br>i Note<br>For hiring and rehiring events, always use Target; otherwise, the workflow won't be triggered.</td></tr>
<tr><td>Edit Transaction</td><td>Specifies how approvers are allowed to change the content of a workflow transaction:<br>• No Edit<br>Approvers don't have in-flight editing capability.<br>• Edit with Route Change<br>Approvers can edit a workflow and the workflow route will be recalculated when they submit the request.<br>• Edit without Route Change<br>Approvers can edit a workflow, but the workflow route won't be recalculated when they submit the request.<br>• Edit Attachments Only<br>Approver can only edit the attachments of the workflow.<br><br>For such changes to work with MDF objects, you must set the Pending Data field of the object to Yes.<br>To do this, go to Admin Center > Configure Object Definitions.</td></tr>
<tr><td>No Approver Behavior</td><td>Specifies whether the current step is skipped or the entire workflow is stopped if the step has no resolved approver. Note that for the approver type of dynamic role, there's an exception: the current</td></tr>
</table>

| Setting | Description |
| --- | --- |
| | step will be directly deleted if it has no resolved approver, regardless of what behavior you specify here. |
| *Relationship to Approver* | Specifies whether the approver is determined based on the workflow subject user (employee) or the workflow initiator. This is relevant only for approver types Role and Position Relationship. For more information about how it works with these two approver types, see Workflow Participation [page 16]. |
| *Respect Permission* | Specifies the permission of participants to view the workflow's fields:<br>• *Yes*: Workflow participants can view only the fields for which they have permission.<br>• *No*: Workflow participants can view all fields regardless of their assigned role-based permission.<br><br>Respect Permission setting doesn't apply to workflows that are triggered by a change to the following entities. So, even if you've selected *Yes*, participants can still view all fields in the workflow.<br>• New hire and rehire<br>• Global Assignment and Concurrent Employment<br>• Pension payout<br>• Dependents<br>• Work permit<br>• Change to foundation objects |
| *Workflow Email Configuration* | Specifies a predefined workflow e-mail configuration.<br><br>After a step approver approves a workflow request, it proceeds to the next step and the system uses the workflow email configuration selected for that step to decide who receives notifications. If Current Approver in that configuration (defined in *Manage Workflow Email Configuration*) has notification enabled for the Workflow Approved action, the second step's approver will be notified accordingly; if not enabled, this approver won't be notified. |
| *Days until Auto Approval* | Specifies the number of days that elapse before the system auto-approves a non-responsive step. Enter an integer greater than 0 to enable the feature; leave it empty to disable the feature. If you choose to use this feature, make sure you also create a background job that regularly polls all stalled workflows and approves qualified non-responsive steps. |

5. (Optional) Define workflow contributors.

   For the contributors, select a contributor type and contributor role. You can also include multiple contributors or contributor types by creating multiple rows.

   For each of the contributor rows, specify the following additional settings:

| Setting | Description |
| --- | --- |
| *Relationship to Approver*<br><br>**i Note**<br>Although it says "approver", it actually designates the relationship to the contributor. | Only relevant for contributor type Role or Position Relationship. For more information about how it works with these two contributor types, see Workflow Participation [page 16]. |

| Setting | Description |
|---|---|
| *Context* | When a data change can decide who the contributor should be, Context specifies whether the contributor before or that after the change should be used eventually. You can define Context the same way as for approver steps. |
| *Respect Permission* | Same as how you define it for approver steps. |

6. (Optional) Define the workflow CC roles. You can specify the CC roles by type and you can include multiple CC roles.

   For each of the CC roles, specify *Relationship to Approver*, *Context*, and *Respect Permission*, and specify these settings the same as for approvers.

   In addition, you can select *Workflow Email Configuration* for workflow completion notices.
7. Save the workflow.

## Results

The workflow is created. It's available to be assigned to business rules or objects.

# 3.2.1.1 Step Removal, Approver Skipping, and Approver Replacement

Some steps on an approval chain can be automatically removed and particular approvers can be skipped or replaced. This improves processing efficiency without compromising data quality and legal compliance.

## Step Removal

Steps are removed under the following conditions:

| Approver Type | When to Remove | When Not to Remove |
|---|---|---|
| Role (Self, Manager, Manager Manager, Employee HR) | • If the resolved approver of the first step or steps is also the workflow initiator, the step or steps are removed.<br>• If two or more consecutive steps (not necessarily the first ones) have the same resolved approver, all but the first step are removed. However, this rule is overridden if you've enabled the option *Skip workflow steps with duplicate approver*. | When the workflow starts over again due to an edit that causes a route change, even if the initiator is the first step approver, that step is not removed. The initiator needs to approve what has been changed. |
| Role (Matrix Manager,Custom Manager, Second Manager, Additional Manager) | Not applicable. | The involved step or steps are not removed. |
| Dynamic Group, Position, Position Relationship | Not applicable. | The first step (or any other step) isn't removed if the workflow initiator is one member of the group or is assigned to the position. This step is not removed, because there might be other group members or employees of the same position who can approve the workflow.<br><br>**Note**<br>Even the workflow initiator turns out to be the only member of the dynamic group or the only user of this position, this step is not removed. |
| Dynamic Role | If the resolved dynamic role is a person, it's treated like a **Role (Self, Manager, Manager Manager, Employee HR)**. | If the resolved dynamic role is a position or dynamic group, the involved step or steps are not removed. |

For the approver types other than *Role (Self, Manager, Manager Manager, Employee HR)*, you can enable the Four-Eye Principle feature to ensure data compliance by preventing the initiator from approving requests they created. With that enabled, the initiator is removed from the approvers and the approval request is sent only to other possible approvers of the step.

## Approver Skipping

If you've enabled the option *Skip workflow steps with duplicate approver* in the *Company System and Logo Settings*, all the consecutive steps with the same single approver, except the last one, will be skipped automatically when the workflow is initiated. Unlike removed steps, which are not shown on the *Workflow Details* page, all skipped steps are indicated so in the *Activity* area of the page. By taking these steps out of an otherwise long approval chain, this feature improves the efficiency of processing workflows without affecting data quality.

With the option enabled, workflow steps must meet these criteria to be skipped automatically:

- The steps must be consecutive, that is, immediately adjacent to each other. However, the last one of a series of such consecutive steps is not skipped, this is because the approver should have at least one chance to process the workflow.
- They have the same single approver.

> i Note
>
> This is regardless of the approver type, which can be Role, Dynamic Group, Dynamic Role, or Position. The criterion is met as long as the final resolved approver is the same single approver.

Table 3: An Example Workflow Demonstrating the Skip Logic

| Steps: Original Approvers | Skipped? | Explanation |
|---|---|---|
| Step 1: user1 | Yes | Has the same single approver as Step 2. |
| Step 2: user1 | Yes | Has the same single approver as Step 3. |
| Step 3: user1 | No | Is the last step of this series of consecutive steps. Step 4 has a different approver. |
| Step 4: user2 | Yes | Has the same single approver as Step 5. |
| Step 5: user2 | No | Step 6 has **multiple** approvers, even though one of them is the same approver as Step 5 (user2). Step 8 has the same single approver as Step 5, but they are not consecutive. |
| Step 6: user1, user2 | No | Though it has exactly the same approvers as Step 7, it's not skipped because we only skip steps with a single approver. |
| Step 7: user1, user2 | No | Has multiple approvers. |
| Step 8: user2 | Yes | Has the same single approver as Step 9. |
| Step 9: user2 | No | This is the last step. The final step is never skipped. |

### Approver Replacement

In general, if an employee who is the subject of a workflow is resolved as a step approver, the employee is automatically replaced by their manager as the step approver. The detailed replacement scenarios and exceptions are explained as follows:

| Approver Type | When to Replace | When Not to Replace |
|---|---|---|
| Role (Self, Manager, Manager Manager, Employee HR) | Not applicable. | If the resolved approver is any of the four roles and happens to be the subject user, the approver isn't replaced. |
| Role (Matrix Manager,Custom Manager, Second Manager, Additional Manager) | If the resolved approver is any of the four roles and happens to be the subject user, the approver is replaced. | Not applicable. |
| Dynamic Group, Position, Position Relationship | The approver is replaced in the following cases:<br>• The subject employee is part of the dynamic group.<br>• The subject employee is assigned to the position or position relationship. | For a workflow for the MDF Position object, the approver isn't replaced: In a position workflow, if a user initiates a change for his or her own position object, and the user happens to be the first-step approver, the user can approve the workflow (as the approver) and can withdraw the workflow (as the initiator). |
| Dynamic Role | If the resolved approver happens to be the subject user, the approver is replaced. | Not applicable. |

### Related Information

Enabling Four-Eye Principle for Workflow Approvals [page 77]

## 3.2.2 Importing Multiple Workflow Objects with a CSV File

Importing multiple workflow objects in one go is useful when you're migrating workflow configurations from the testing environment to the production environment or if you have a set of generic workflows as a starting point for your implementation.

### Prerequisites

You have permission to *Import Foundation Data*. For more information, see List of Role-Based Permissions.

## Procedure

1. (Optional) If you're migrating from the testing environment, you can export current workflows from the testing environment as follows:
    a. Go to *Admin Center* > *Reporting*, and choose *New* to start creating a report-table of *Foundation Objects*.
    b. Select the columns related to workflow, approver, contributor, and CC role as required by the workflow import template and arrange them in the sequence as listed in the template. For details about the required columns and sequence, see Step 3.
    c. Save the report as a CSV file.
2. Go to *Admin Center* > *Import Foundation Data*.
3. (Optional) If you don't have a CSV file with ready workflow data, download the workflow template and enter workflow details into it. One row in the CSV file corresponds to one workflow.

    > → Remember
    >
    > Please do NOT use Microsoft Excel to edit the .csv file, as special characters in the text might be corrupted. Edit it with Notepad, Open Office, or a UTF-8 editor.
4. Select *Workflow* as the foundation data type.
5. Select the upload type:
    - *Full Purge*
      After you upload the CSV file, all existing workflows in the system are overwritten by the entries in the CSV file.
    - *Incremental Load*
      With an incremental upload, new workflows are added to the system and workflows already existing are updated.
6. Select the CSV file that you've saved with the workflow data.
7. For the file encoding, select Unicode (UTF-8), which supports characters of all languages.
8. Import the file.

    You can also validate the file before importing.

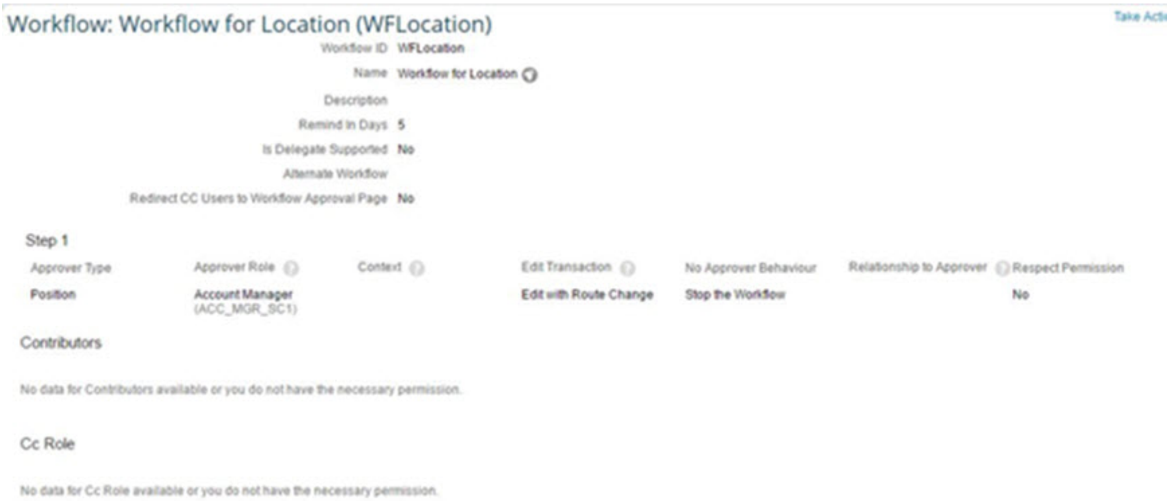
## Results

You can find the imported workflows in the *Manage Organization, Pay and Job Structures* admin tool.

## 3.2.3 Example: Configuring Workflows for Legacy Foundation Objects

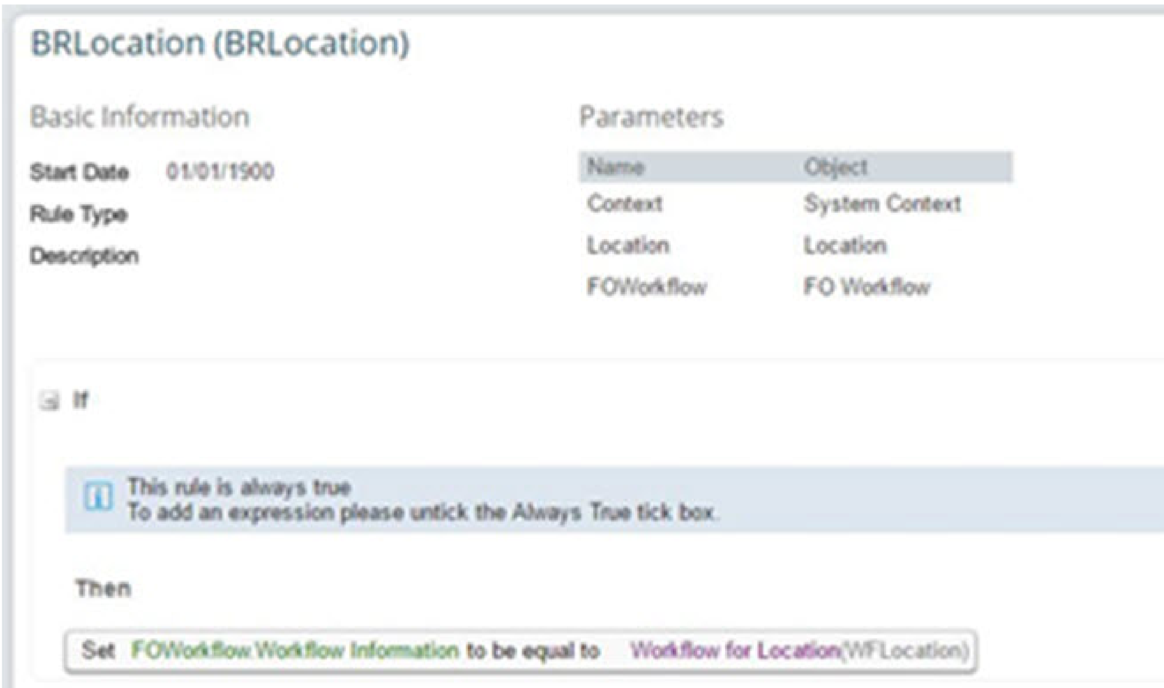
In this example, we configure a workflow for the Location foundation object. The workflow will be triggered when a new Location is created or an existing Location is edited.

1. Create a workflow for Location.




   For more information on how to configure workflows, see the Employee Central Workflows: Implementation and Administration guide on the SAP Help Portal.

2. Create a business rule that can trigger the workflow.
   The base object must be the foundation object for which the workflow should be triggered. The parameter code FOWorkflow and the object FO Workflow must also be included.




   For more information on how to configure rules, see the Implementing Business Rules in SAP SuccessFactors guide on the SAP Help Portal.

3. Add the rule as an onSave event to the foundation object in the Corporate Data Model.

# 4 Triggering Workflows

After you've defined the workflows that can support your approval processes, you can now decide when and how workflows are triggered.

## Triggering Workflows with Business Rules

Business rules, based on Metadata Framework (MDF), provide you the flexibility to define specific conditions that trigger a workflow. For example, when employees' salary is increased (the payment information is changed with the event reason of pay raise), a particular workflow is initiated for the salary increase approval.

Using business rules to trigger workflows doesn’t require access to Provisioning. It is also recommended for new customers without much experience with the system.

## Creating Rules That Trigger Workflows for Foundation Objects

When you create business rules for any objects other than foundation objects, workflow parameters are set by default. However, when you create business rules for foundation objects, you should add workflow parameters to the rule.

## Assigning Workflows Directly to Generic Objects

You can have simpler workflow mechanisms for some data types. For example, creation of or change to data records of an MDF generic object should trigger the same workflow. For these scenarios, you can assign a workflow to the object directly.

## Triggering Workflows with XML File-Based Derivation (YouCalc Rules)

Triggering workflows this way is not recommended for new customers and requires access to Provisioning.

> **Note**
>
> In Provisioning, you can either enable YouCalc rules or business rules; they cannot be enabled at the same time.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

### Related Information

Triggering Workflows with Business Rules [page 38]
Triggering Workflows with XML File-Based Derivation (YouCalc Rules) [page 54]
Assigning a Workflow Directly to Generic Objects [page 53]

## 4.1 Triggering Workflows with Business Rules

Workflows are triggered for specified events or data changes. You can create business rules to define conditions that should be met before a specified workflow is triggered for an object.

### Overall Procedure

1. Create a business rule using the scenario *Trigger Workflows*.

   → Tip

   We recommend that you use the *Trigger Workflows* scenario while creating new rules instead of the *Basic* scenario. This special-purpose business rule scenario *Trigger Workflows*, helps to create rules more easily because it provides useful guidance at various steps.
2. Specify the workflow to be triggered in the *wfConfig* field of the business rule.
3. Assign the business rule to the target data object, either an Employee Central object or an MDF object.

   i Note

   To make workflows work for an MDF data object, change its *Pending Data* attribute to *Yes*. Otherwise, any change to the object takes effect immediately, without triggering any workflow assigned to the object.
4. Initiate a data change. For example, edit fields of the object on the UI or import data for the object.

## Recommendations for Workflow Rules

- It's recommended to have one rule with several IF statements rather than create several single rules.
- When the entity is processed on UI, its corresponding onSave rule is evaluated and the workflow assigned is triggered if the rule condition is met. On the other hand, if a workflow is not assigned using the onSave rule, the system saves the data directly.
- New hire rules for workflow configuration derivation must be defined under the jobInfo entity. It's recommended to configure the new hire rules in the beginning so that other rules further down can check for null values before setting it.
- Checking whether the wfConfig field is null before assigning a value to it can prevent overwriting the field wfConfig.
- All the onSave rules configured for an entity/element are evaluated. The value of the workflow configuration set by **the last matching rule** is considered by system. With the youCalc rules framework, the value of the workflow configuration set by the first matching rule is considered by the system. Therefore, ensure that the rules are defined in an appropriate sequence.
- The onSave rules to set event reason or workflow can be assigned to the respective HRIS element in the Business Configuration UI. Once saved, the onSave rule is created in the Succession Data Model (SDM) for the corresponding entity.
- It's sometimes impossible to achieve one-to-one mapping between a youCalc rule definition and a business rule definition. To see how mapping is done, refer to Mapping Existing YouCalc Rules to Rules in the Business Rules Framework.

## Using Different Workflows for Different User Permission Groups

Normally, if a data change triggers a workflow, it will trigger the same workflow, irrespective of who has made the change. For example, various administrators may make a data change, and this will not trigger any workflow or it will trigger the same workflow.

However, using well-designed business rules, you can have a data change trigger different workflows depending on who has made the change. For example, you can use the function “Is User in Permission Group()” to check if the current user is part of a specific permission group (not the workflow group!) and then decide which workflows should be triggered accordingly.

## Check Tool for Trigger Workflows Rule Scenario

To find workflow business rules that have been created using the *Basic* scenario, you can run the check *All rules for workflows are assigned to an application-specific rule scenario (WorkflowsNoBasicRules)* in the Check Tool.

The check is available in *Migration Tab* > *Employee Central Core: Rules*. Based on the results, you can then choose the next step to automatically migrate eligible rules to the *Trigger Workflows* rule scenario. There's no impact on the working of the rules post migration.

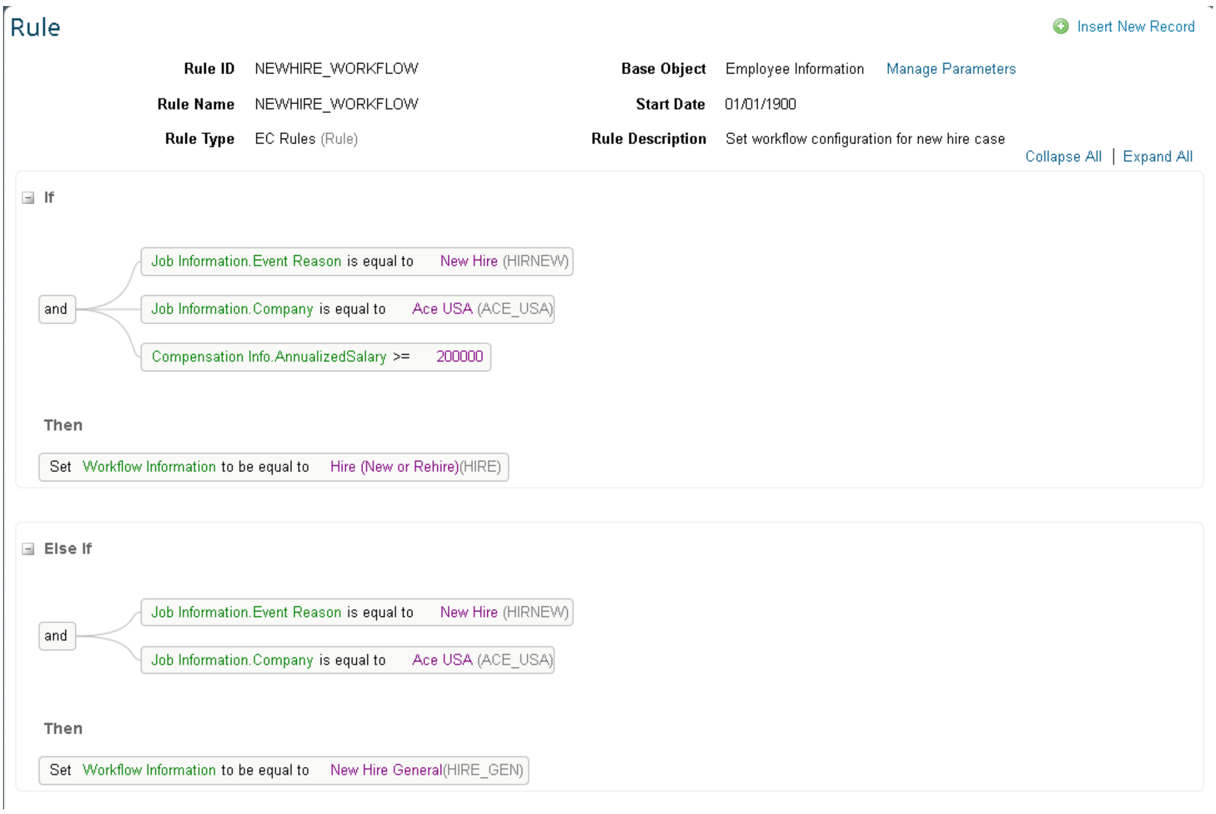
## Related Information

Creating a Business Rule
Base Objects in a Business Rule
Assigning a Business Rule to an Employee Central Object
Assigning a Business Rule to an MDF Object

## 4.1.1 Example Workflow Rules for New Hire UI

In the case of a new hire scenario, workflow configuration derivation rules must be defined with the base object *Employee Information/Employee Information Model*. The field wfConfig is available on the Employee Information/Employee Information Model entity.

A sample workflow configuration derivation rule for new hire is shown below.




In this example, the base object is "Employee Information" and there are two conditions. The behavior of the rule is explained as follows:

**Condition 1**: Checks if the hire record's jobInfo event reason is set to *New Hire*, the jobInfo company is *Ace USA*, and the hire record's compInfo Annualized Salary is greater than 200,000.

If this condition is satisfied, the workflow configuration *Hire (New or Rehire)* is triggered.

**Condition 2**: Checks if the hire record's jobInfo event reason is set to *New Hire* and the jobInfo company is *Ace USA*. This condition handles the case where the annualized salary is less.

If this condition is satisfied, the workflow configuration *New Hire General* is triggered.

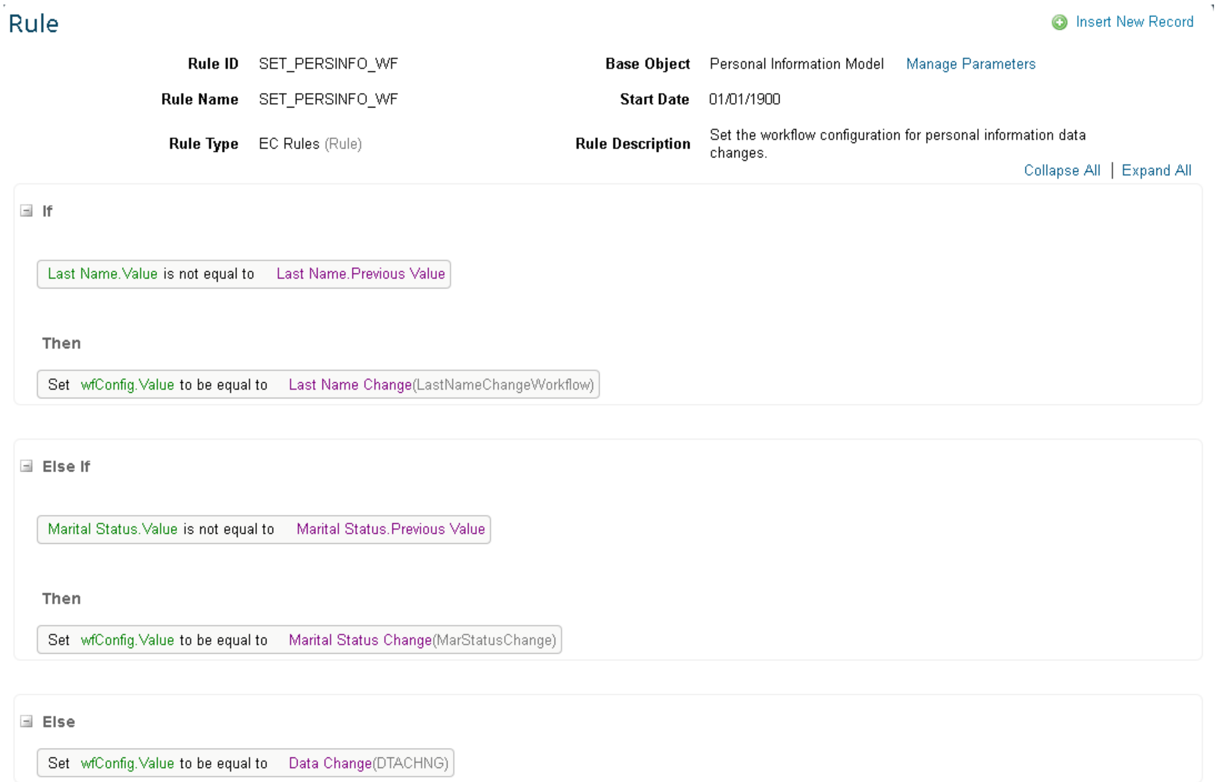
## 4.1.2 Example Workflow Rules for ESS

Workflow configuration derivation rules can be configured with an appropriate base object, such as personalInfo. The field *wfConfig* must be assigned an appropriate value and when the conditions are met, the workflow is triggered.

### Example: Personal Info

An example of defining the workflow configuration derivation rule for an ESS case is illustrated below.

In this example, the base object is “Personal Information Model” and there are three conditions. The behavior of the rule is explained as follows:




**Condition 1**: Checks if the personalInformation last name is changed (not equal to its previous value).

If this condition is satisfied, the workflow configuration Last Name Change is triggered.

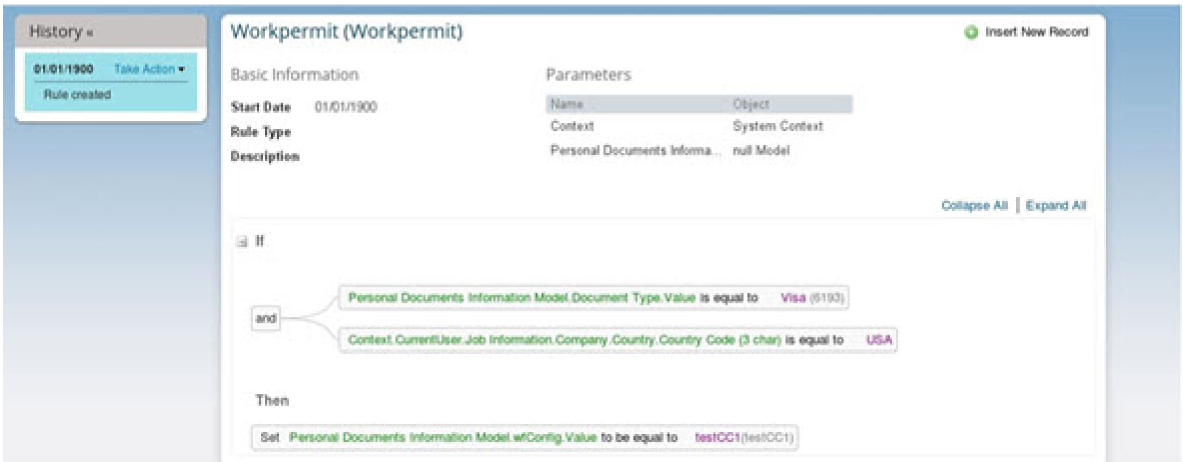
**Condition 2**: Checks if the personalInformation marital status is changed (not equal to its previous value).

If this condition is satisfied, the workflow configuration Marital Status change is triggered.

**Condition 3**: An `else` condition that handles any other change to the employee's personal information and sets the workflow configuration to Data Change. This workflow is triggered if neither condition 1 nor condition 2 is satisfied.

## Example: Work Permit

In the rule, select Personal Document Information Model as the base object.




After you have created the rule, you need to assign it to the work permit object as onSave rule.

### Source Code

```
<hris-element id="workPermitInfo">
        <trigger-rule event="onSave" rule="Workpermit"/>
</ hris-element>
```

Here is a sample YouCalc workflow rules to trigger the a work permit workflow:

### Sample Code

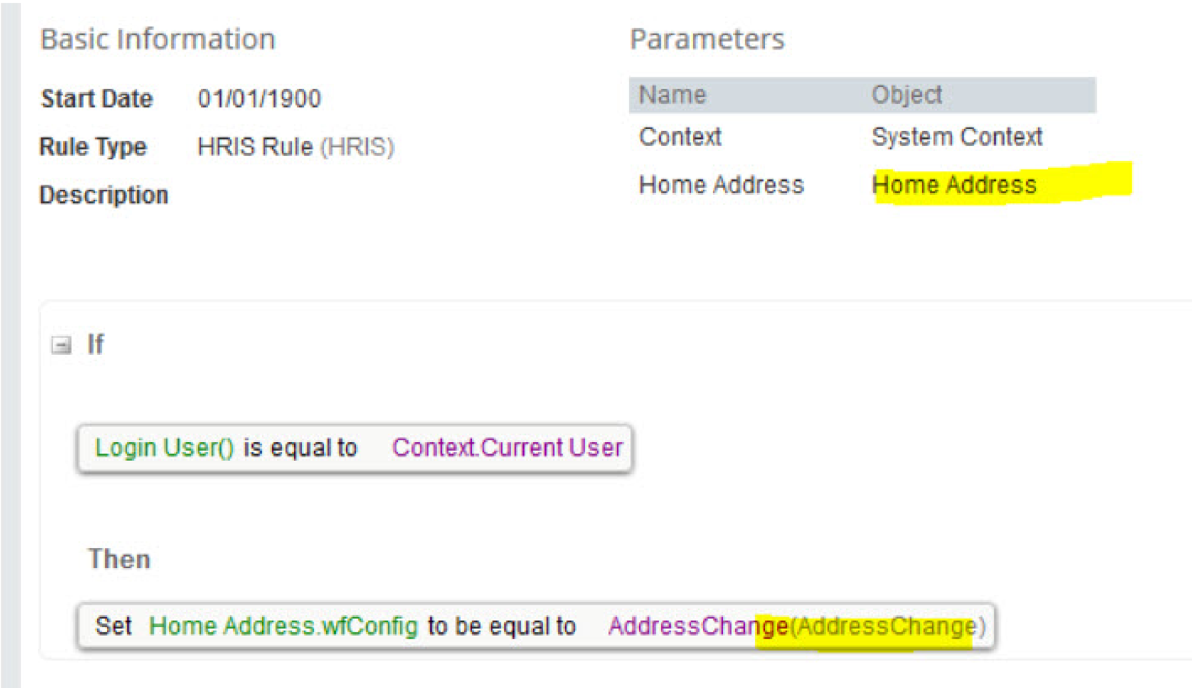
```
 <and>
                <equal id="jobInfo.company.countryOfRegistration"
value="USA"/>
<or>
                <equal id="workPermitInfo.document-type" inverse="true"/>
                                                <equal
id="workPermitInfo.document-type" />
</or>
</and>
```

### Example: Home Address

You can have a workflow triggered when an employee makes a change to their home address. Additionally, you can configure it so that the workflow is not triggered when an HR admin makes the change on behalf of the employee.

In this rule, the system checks who the login user is using the rule function Login User and for whom (Context.Current.User) data is being changed. If the two are the same person, then the workflow is triggered; otherwise, the workflow is not triggered.

This is an onSave rule for the home address.




## 4.1.3 Example Workflow Rules for MSS

Workflow configuration derivation rules can be configured with an appropriate base object such as jobInfo, compInfo or jobRelationshipInfo.

Set the field *wfConfig* to an appropriate workflow configuration and the corresponding workflow will be triggered when the condition is met.

### Example: Global Assignments

For global assignment workflows, you have to configure the corresponding event or event reason in the workflow rules XML, for example:

```
jobInfo.event="GA"
```

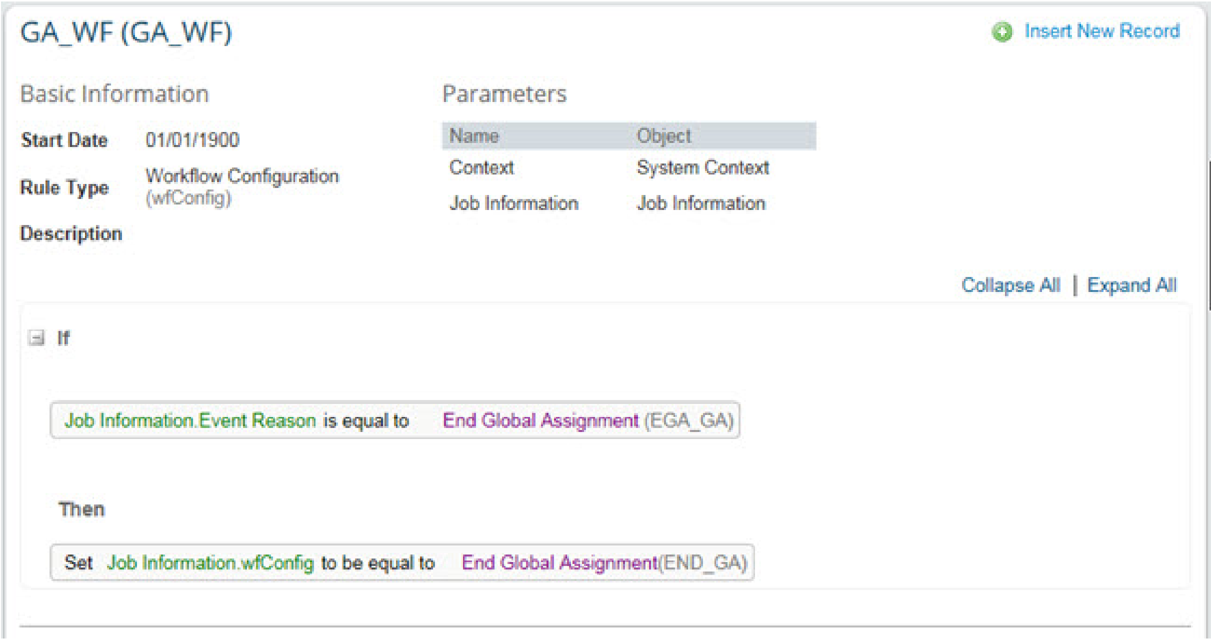
or:

```
jobInfo.event-reason="AddGA"
```

The workflow for editing a global assignment does not require an event or event reason specific to global assignments.

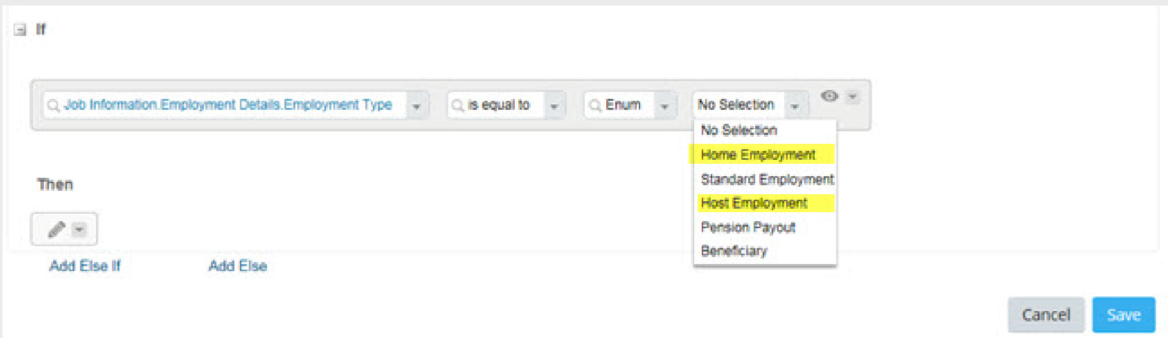
You can assign configurable business rules (`trigger-rules`) to the Global Assignments portlet (in Job Info) for the following rule events:

- `onView`
- `onChange`
- `onSave`



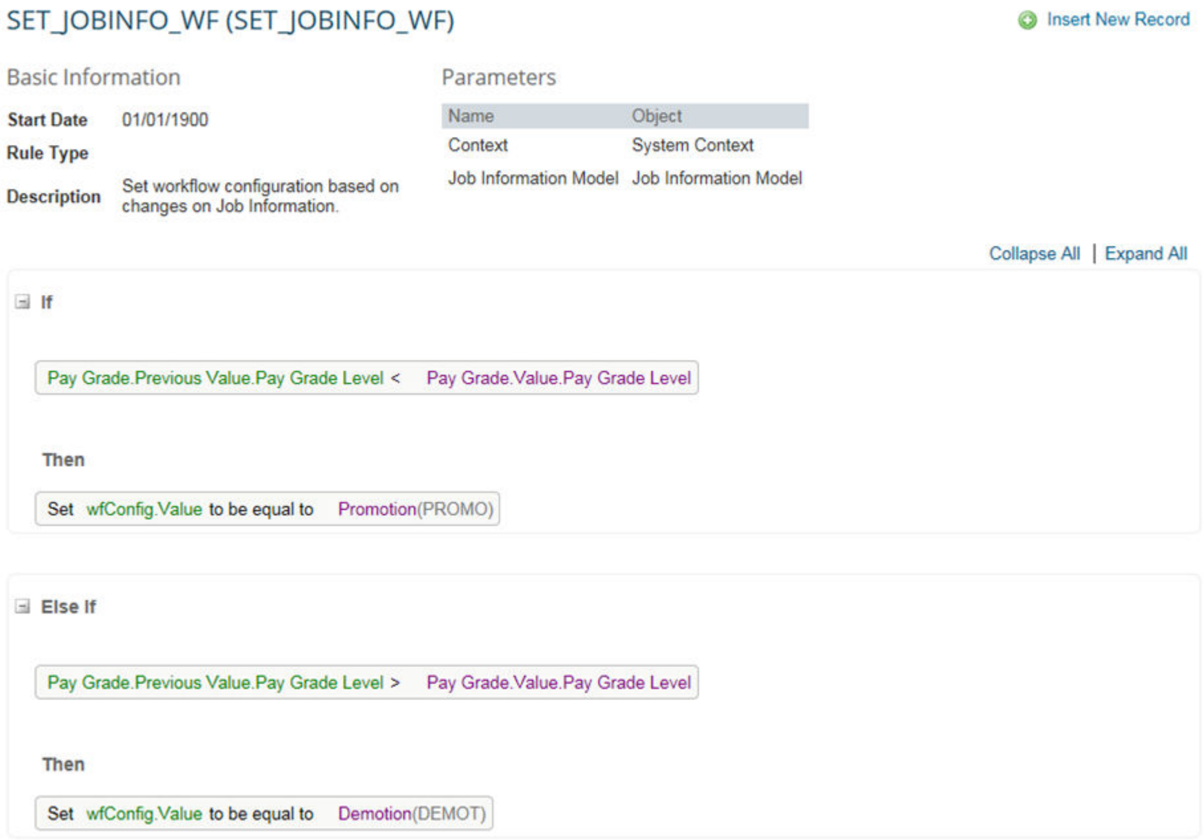

### i Note

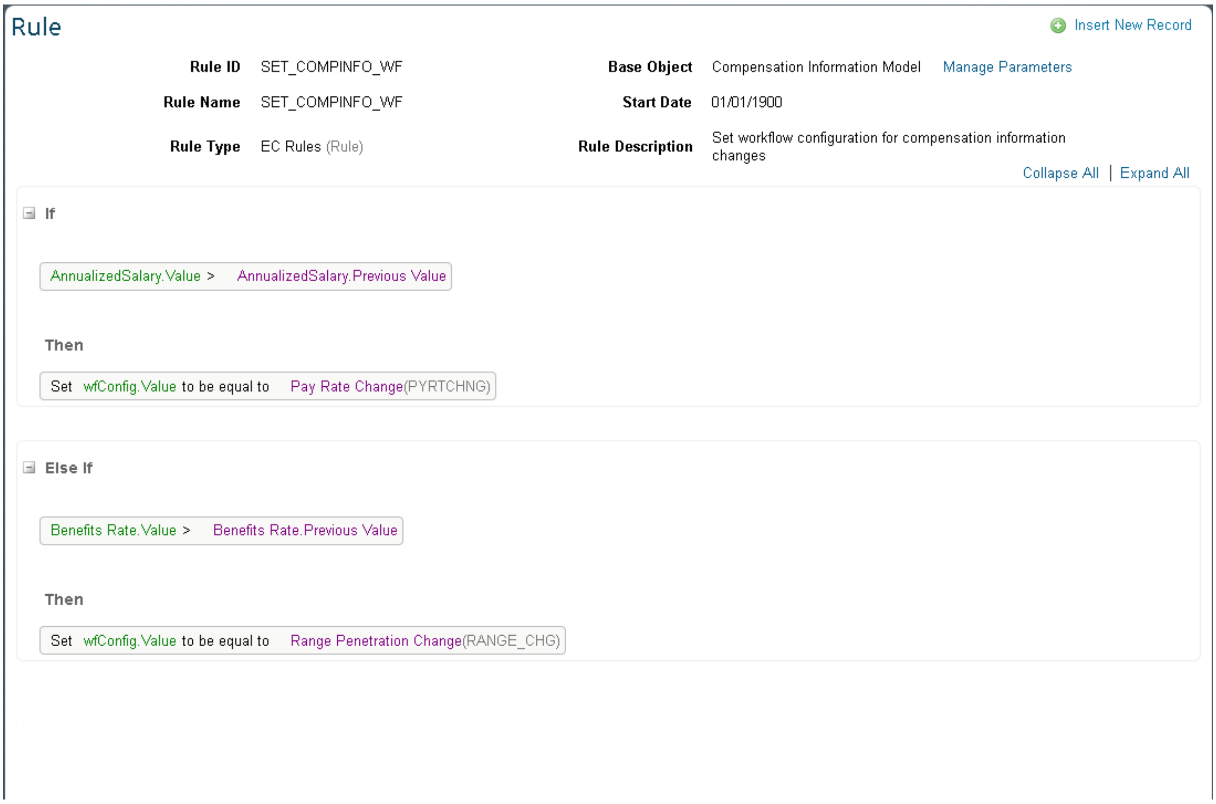
For rules that use Employment Type, you need to choose a proper value (either Home Employment or Host Employment) for it.



## Example: Job Info

In this example, a rule called SET_JOBINFO_WF is defined for the base object jobInfo and SET_COMPINFO_WF is defined for compInfo. Both rules are configured as onSave rules.






From the MSS *Take Actions* page, when both the jobInfo and compInfo entities are changed, the onSave rules behave as follows:

1. If the condition set by rule `SET_JOBINFO_WF` is met as well as the condition set by rule SET_COMPINFO_WF is met, it is either **Promotion** or **Demotion**, which is set on the jobInfo entity, that will be triggered.
2. If only the jobInfo is changed and the condition mentioned by `SET_JOBINFO_WF` is met, it is either **Promotion** or **Demotion** that will be triggered.
3. If only the compInfo is changed and the condition mentioned by `SET_COMPINFO_WF` is met, either **Pay Rate Change** or **Range Penetration Change** will be triggered.
4. When multiple entities are processed from the MSS UI, the preference is given to the workflow configuration set on the jobInfo entity. If none is set on the jobInfo entity, then the system checks whether a workflow configuration is set on the compInfo entity. If none is set on the compInfo entity either, then the system proceeds to check whether a workflow configuration is assigned to any other entity. If none is assigned, then the system saves the data directly.

The table given below illustrates the case when multiple entities are being processed from the MSS UI.

**i Note**

If the MSS workflow has multiple entities, such as jobinfo, comp info and/or job relationship workflow, the wfConfig is derived from the onSave result in this order:

1. Pick from jobinfo entity's wf config result
2. Else: pick from compinfo entity's wf config result
3. Else: pick from jobRelationship entity's wf config result

With Centralized services enabled, the wfConfig is derived from the onSave result in this order:

1. Pick from jobinfo entity's wf config result
2. Else: pick from jobRelationship entity's wf config result
3. Else: pick from compinfo entity's wf config result
4. Else: pick from paycomponentrecurring wf config result

| Scenario | Entities Processed | Rule ID | Rule Evaluated | Rule Result | Workflow Configuration Triggered | Comments |
|---|---|---|---|---|---|---|
| Change Job and Compensation Information | jobinfo | SET_JOBINFO_WF | Yes | Success, Condition Matched | Promotion with Pay Change (PROMO_PAY) | Though compinfo.wfConfig is set with Pay Rate Change, wfConfig set on jobinfo is preferred. |
| | compinfo | SET_COMPINFO_WF | Yes | Success, Condition Matched | | |
| Change Job Information | jobinfo | SET_JOBINFO_WF | Yes | Success, Condition Matched | Promotion (PROMO) | The ELSE IF branch of the rule succeeds and sets the wfConfig with the value Promotion (PROMO). |
| Change Compensation Information | compinfo | SET_COMPINFO_WF | Yes | Success, Condition Matched | Range Penetration Change (RANGE_CHG) | The ELSE IF branch of the rule succeeds and sets the wfConfig with the value Range Penetration Change (RANGE_CHG). |
| Change Job Information, Job Relationship, and Compensation Information | jobinfo | SET_JOBINFO_WF | Yes | Failed, Condition Not Matched | No workflow triggered, data saved directly | jobinfo.wfConfig is not set and neither is compinfo.wfConfig. There is no rule configured for the job relationship and therefore wfConfig is not set. The data is saved di- |
| | compinfo | SET_COMPINFO_WF | Yes | Failed, Condition Not Matched | | |

| Scenario | Entities Processed | Rule ID | Rule Evaluated | Rule Result | Workflow Configuration Triggered | Comments |
|---|---|---|---|---|---|---|
| | jobRelationship | No rule | N/A | N/A | | rectly to the system. |

> **i Note**
>
> | For... | Assign rule at ... |
> |---|---|
> | • Internal Hire workflow<br>• Global Assignment workflow<br>• Concurrent Employment workflow<br>• Termination workflow | Job Info |
> | • New Hire workflow | The rule can be assigned to Job Info, Comp Info or any element but the base object must be Employee Information Model. |

## Example: Work Orders

Workflows are supported for the creation, change, or deletion of work orders.

The base object of the rule must be WorkOrder.


For creation and change workflows, this is an onSave rule. It must be added to the Work Order on the *Configure Object Definition* page. Set Pending Data to *Yes*.

Before the workflow is approved, a new work order record will be added to the work order history. However, this record cannot be edited and deleted. After the workflow is approved, the work order history will be updated with latest information and the interim record disappears. Workflows will not be triggered for inactive work orders.

For deletion workflows, the rule is an onDelete rule. It must be added to the Work Order on the *Configure Object Definition* page. If the work order is deleted by an import, the workflow is not automatically triggered. Before the workflow is approved, there will be no change in the work order history. After the workflow is approved, the related work order is deleted. Workflows will not be triggered for inactive work orders.

### 4.1.4 Limitations for Workflow Rules

There are a few limitations on using onSave rules for workflows and event-reason derivation.

- **Processing grid/row type entities**
  Defining rules that involve grid-type entities can result in an unpredictable outcome since the order in which individual rows are processed cannot be guaranteed .

  > i Note
  >
  > Example: Consider a rule defined on the National ID entity as follows:
  >
  > IF NationalID.Country = *USA* THEN
  >
  > -> SET wfConfig = *USA National ID Change*
  >
  > ELSE
  >
  > -> SET wfConfig = *Data Change*.

  On the UI the following records are added for National ID:

  | Country | National ID Card Type | National ID | Is Primary? |
  |---|---|---|---|
  | USA | Social Security Number | 778-22-7337 | Yes |
  | India | Permanent Account Number | ABCDF8987E | No |
  | Australia | Tax File Number | 887 766 399 | No |

  When the rule is evaluated, the wfConfig is set to "Data Change" and not "USA National ID Change" as one might expect. The reason is that, when the record with Country = Australia is processed at the end, the IF condition is not met and the ELSE branch sets wfConfig to value "Data Change".

- **External code of picklist cannot be configured in a rule.**
  Example:
  Consider the following youCalc rules XML definition:

```
<!-- YouCalcUse-case for JobRelationships -->
        <rule id="RULE_JOBREINFO">
                <trueoutput>JOBREL_WORKFLOW</trueoutput>
                <conditions>
```

```
                 <or>
                    <equalid="jobRelationsInfo.relationship-
type.custommanager" inverse="true"/>
                 </or>
         </rule>
```

It is not possible to create the same rule using the business rules framework since all picklist options with *external_code = custommanager* will match the rule.

- **It is not possible to access multiple entities in one rule for non-hire cases.** For example, the Global Assignment entity cannot be used in conjunction with the jobInfo entity in a single rule for an "Add Global Assignment" case.
  The exception to this is that you can have a cross-entity rule between jobInfo and compInfo using the Employment Information. During the rule configuration, choose jobInfo or jobInformationModel as the base object.
- **It is not possible to have derivation rules for country-specific fields/objects.**
  Assigning a workflow derivation rule at a country-specific field/object or in the CSF SDM is possible, but the system does not read the rule and as a result, no workflow is created.

## 4.2 Creating Rules That Trigger Workflows for Foundation Objects

You can create a rule that triggers workflows for any change to a foundation object (FO), so approvers will be prompted to approve, reject, or provide input for the data change.

### Procedure

1. Go to *Admin Center* > *Configure Business Rules*.
2. Choose + *(Create New Rule)* on the *Business Rules Admin* page.
3. On the *Configure Business Rules* page, select either of the following scenarios for your FO workflow:
   - *Trigger Workflows* under *Employee Central Core*: This application-specific scenario provides guidance for you when choosing supported objects, parameters, or actions to minimize errors.
   - *Basic* under *Basic*: This scenario is recommended for experienced users, because it isn't application-specific.

   > → Tip
   >
   > We recommend that you use the *Trigger Workflows* scenario while creating new rules instead of the *Basic* scenario.

4. Fill out required fields such as *Rule Name*, *Rule ID*, *Start Date*, and *Base Object* as the foundation object (such as "location").

→ Tip

If you've chosen the *Trigger Workflows* scenario in Step 3, only entities that are allowed to have a workflow will be shown in the *Base Object* dropdown list; if you've choose *Basic*, note that not all entities shown are supported.

5. **Conditional:** If you've chosen the *Basic* scenario and you want to create a workflow-triggering rule, leave the *Rule Type* field empty.

i Note

If you've chosen the *Trigger Workflows* scenario, this field is automatically hidden.

6. Choose *Continue*.
7. **Conditional:** If you've chosen the *Basic* scenario, add the following parameter in the *Parameters* section:

| Name | Code | Object |
|---|---|---|
| Enter a meaningful name for the parameter, for example, FO Workflow.<br><br>This name will appear in the dropdown list for the `IF` and `THEN` statements of the rule. | **`FOWorkflow`**<br><br>i Note<br><br>Use this exact spelling and capitalization. | **`FO Workflow`** |

You'll use this parameter to select the workflow to be triggered in the `THEN` statement.

→ Tip

If you've chosen the *Trigger Workflows* scenario, you don't need to do anything in this step.

8. Define `IF` conditions to determine when to trigger the workflow.

→ Tip

Select *Always True* if the rule is to be triggered when any change occurs to the object.

9. Define the `THEN` statement that triggers a workflow:
   a. Choose the pen icon and select "Set" as the output type.
   b. In the Left Expression field, select *FO Workflow* > *Workflow Information*.
   c. Define the right expression by choosing "to be equal to" and the workflow that you want the rule to trigger.

→ Tip

If you've chosen the *Trigger Workflows* scenario, you'll only be able to select the action and the left expression described above (others not supported are hidden); if you've choose *Basic*, be sure to select the correct action and left expression.

10. **Optional:** Add `ELSE IF` or `ELSE` statements if you want to combine several conditions.
11. Save the rule.

## Results

The rule is created. After you assign it to the relevant foundation object, the selected workflow is triggered when the defined changes or criteria happen to the foundation object.

## Next Steps

Assign the rule to the foundation object.

## Related Information

Creating a Business Rule
Assigning a Business Rule to an Employee Central Object

# 4.2.1 Foundation Objects

Foundation objects, such as job codes, or cost centers, are one type of Employee Central objects, which are used to set up data across an entire organization. They are defined and configured in the Corporate Data Model.

Here are a few tips on using workflows for foundation objects.

- You can only create workflows for effective-dated foundation objects.
- Workflows are triggered for foundation objects when they're created, changed, and deleted. You cannot define a rule that triggers a workflow only when a foundation object is changed, and not when it's created or deleted.
- The workflow used for the foundation object supports only the following approver, contributor, or CC role types:
  - For approvers: Dynamic Group, Position
  - For contributors: Dynamic Group, Position
  - For CC Role users: Person, External Email, Dynamic Group, Position

  > **i Note**
  >
  > Other types are ignored when the workflow is triggered. If the workflow has no valid step approver as a result, the workflow is skipped completely and the changes to the foundation object are saved without triggering the workflow.
- You cannot edit or update workflows for foundation objects on the workflow approval page.
- If you have multiple workflows for creating foundation objects having the same name, and the foundation objects you intend to create have the same effective date, you won't be able to approve the second workflow when the first workflow has already been completed. See the following example.
  **Example**:

You create a foundation object **`Location A`** with an effective date of 01/01/2014, and trigger workflow 1. Before workflow 1 is completed, you create a second foundation object, with the same name "Location A" and the same effective date of 01/01/2014, and trigger workflow 2.

After workflow 1 has been approved and completed, the foundation object **`Location A`** (effective on 01/01/2014) is successfully created as a result. Now if you try to approve workflow 2, the request will be rejected because the foundation object with the same data already exists.

## 4.3 Assigning a Workflow Directly to Generic Objects

If you only have a simpler workflow mechanism for an MDF generic object, you can assign a workflow directly to the object. That workflow will be triggered when data record of this object is created or changed.

### Context

For example, if you only need one workflow for all Time Off processes, you can assign this workflow directly at the Employee Time object definition. The assigned workflow is triggered when an employee requests time off or changes the time-off request.

> **i Note**
>
> If that object has been assigned a business rule that also triggers a workflow, the workflow defined in the business rule takes priority over the workflow assigned directly to the object. Workflow triggering of this object is governed by the business rule.

### Procedure

1. Go to *Admin Center* > *Configure Object Definitions*.
2. Edit the MDF generic object.
3. Assign the workflow in the *Workflow Routing* field.
4. Save the object.

### Results

When a data record of this object is created, changed, or deleted, the assigned workflow will be triggered.

## 4.4 Triggering Workflows with XML File-Based Derivation (YouCalc Rules)

Using XML files (YouCalc rules) to trigger workflows is a legacy way and not recommended for new customers.

It's recommended that new customers use business rules to trigger workflows. The advantage for this is that they can make any changes in Admin Center only, without the need to access Provisioning.

You can define whether a workflow is triggered based on a change on the UI, or if you want to use events you have set up before. In the next topic, you'll see some examples of how you can set up the workflow in the XML file.

> **Note**
>
> XML workflow rules don't support recurring pay component value comparison.
>
> For example, this setup doesn't work:
>
> Sample Code
>
> ```
> <equal id="payComponentRecurring.pay-component" value="Base Salary"
> compareToNew="true"/>
> <equal id="payComponentRecurring.pay-component" value="MONCAR"
> compareToNew="true"/>
> ```

### 4.4.1 Example Workflows with XML File-Based Derivation (YouCalc Rules)

#### Select Workflow Based on Employee or Job Data

In this example, whenever the user changes the department, workflow DEPT_CHANGE is used. DEPT_CHANGE is the external code of the workflow foundation object. You reference the department field as follows:

- The HRIS-element ID you defined before in the Succession Data Model is *jobInfo*.
- The HRIS-field ID is *department*.

Sample Code

```
<rule id="rule-1">
<trueoutput>DEPT_CHANGE</trueoutput>
<conditions>
<and>
<equal id="jobInfo.department" inverse="true" />
</and>
</conditions>
</rule>
```

## Select Workflow Based on Event

To base a workflow on an event, enter the ID in the following format: `hris-element-id.event`

The event field is a picklist. Value "5" is the external code of the event. Because you compare this value with what the user enters on the UI, or with the value derived by the system if you use event-reason derivation rules, you use the `compareToNew` attribute.

> → Tip
>
> If you have uploaded the standard picklist from SAP SuccessFactors without changing the labels, you can find the external codes and their labels in that file. In this example, the external code 5 refers to the event Data Change.
>
> If the picklist labels have been adjusted by the company, you need to check the picklists that were uploaded in the system: Go to *Admin Center* > *Manage Picklists*. This is where you can download and open the picklist used in the system. In the column for the external code, look for the value. In the same row, you find the label for your language (for example, in column **en_US**).

```
<rule id="rule-1">
<trueoutput>OnLeave</trueoutput>
<conditions>
<and>
<equal id="jobInfo.event" value="5" compareToNew="true" />
</and>
</conditions>
</rule>
```

## Select Workflow Based on Event Reason of the Change

You can use any foundation object to create a workflow, including event reason. If you use event-reason derivation rules, create the rules required for your workflows in the corresponding XML file.

So, in the example of a new hire, you can define a rule based on the event reason foundation object in the workflow XML file. The value is the external code of the event reason foundation object. The ID follows the following format: `hris-element-id.event-reason`

See the following example:

```
<rule id="rule-2">
<trueoutput>NewHire</trueoutput>
<conditions>
<and>
<equal id="jobInfo.event-reason" value="HIRNEW" compareToNew="true" />
</and>
</conditions>
</rule>
```

## Select Workflow Based on Country

You can have different workflows for each country. The 3-letter ISO code is used for each country.

In the following example, two workflows are configured for the same change, but for users of different countries. The ID follows the format: `hris-element-id.hris-field-id.country`

You also need to include the country as a value: `value="USA"`

```
<rule id="rule-3">
<trueoutput>CountryUSA</trueoutput>
<conditions>
<and>
<equal id="jobInfo.company.country" value="USA" compareToNew="false" />
<equal id="jobInfo.department" inverse="true" />
</and>
</conditions>
</rule>
<rule id="rule-4">
<trueoutput>CountryIndia</trueoutput>
<conditions>
<and>
<equal id="jobInfo.company.country" value="IND" compareToNew="false" />
<equal id="jobInfo.department" inverse="true" />
</and>
</conditions>
</rule>
```

## Logical Operands for Rules Configuration

You can use the following logical operands when defining rules:

- AND: Both conditions have to be true
- OR: At least one of the conditions has to be true
- XOR: a XOR b is true only when either a or b is true, but NOT both are true (so-called “exclusive OR”).

> **Note**
>
> You cannot combine AND with OR, but you have to create 2 different rules. For example, if you want a rule for a data change to manager and cost center or department, you have to set up a rule for a data change to manager and cost center, and then a second rule for manager and department.

## Comparative Operands for Rules Configuration

And you can use the following comparative operands:

- Greater: The new value is greater than the old value.
- Lesser: The new value is less than the old value.
- Equal: The new value is the same as the old value.

If you want to set something to unequal, meaning data has changed, add `inverse=”true”` to it:

```
<equal id=”jobInfo.location” inverse=”true” />
```

**Example for “greater”**

In this example, the rule is met when the value for the pay grade is increased:

```
You can use the following logical operands when defining rule
<rule id=”rule-2”>
<trueoutput>PAYGRADEINC</trueoutput>
<conditions>
<and>
<greater id=”jobInfo.pay-grade” />
</and>
</conditions>
</rule>
```

**Example for “lesser”**

In this example, the rule is met when the value for the pay grade is lower than before:

```
<rule id=”rule-3”>
<trueoutput>PAYGRADEDEC</trueoutput>
<conditions>
<and>
<lesser id=”jobInfo.pay-grade” />
</and>
</conditions>
</rule>
```

**Example for “equal”**

“Equal” is mostly used in its reverse sense, meaning, that something has changed and thus is **not** equal to what it was anymore. This is achieved by adding the`inverse=”true”` attribute. In the following example, the rule is met when the location in the job information block is changed:

```
<rule id=”rule-3”>
<trueoutput>PAYGRADEDEC</trueoutput>
<conditions>
<and>
<equal id=”jobInfo.location” inverse=”true” />
</and>
</conditions>
</rule>
```

## Field Change to a Certain Value Triggers Rule

In this example, if an employee's department is changed to “ENG”, the workflow ENG_DEPT_CHANGE is used. The `compareToNew` attribute determines whether to use the new value for comparison or the old value; that is, if the `compareToNew` attribute value is true, then it uses the new department value that is changed in Employee Central. If the `compareToNew` attribute value is false, then it uses the user's current department. So in this example, if the user’s department is changed to something other than ENG, this rule will not be used:

```
<rule id=”rule-1”>
<trueoutput>ENG_DEPT_CHANGE</trueoutput>
<conditions>
```

```
<and>
<equal id="jobInfo.department" value="ENG" compareToNew="true" />
</and>
</conditions>
</rule>
```

You can also set the `compareToNew` attribute to “false” if you want to evaluate the initial value of an attribute as in the following example:

```
<equal id="jobInfo.custom-string12" value="N" compareToNew="false" />
```

## Change to Specific Data Object Triggers Rule

Instead of defining the HRIS-field ID as you did in the previous two examples, you can also define the ID of a specific foundation, person or employment object. In the following example, the pay component group A1 has been defined in the system. A1 is the external code of the pay component group (standard label on the UI is *Pay Component Group ID*). In the XML file, you follow this syntax: `hris-element-id.externalCode`

The following rule is met when a change, such as a salary change, to A1 takes place:

```
<rule id="rule-3">
<trueoutput>SC01</trueoutput>
<conditions>
<and>
<equal id="payComponentGroup.A1" inverse="true" />
</and>
</conditions>
</rule>
```

## Rules for Dependents

Here is an example of a rule for dependents. The country restriction can be applied to the active employment of employee rather than the country that refers to the employment.

Without country restriction:

Sample Code

```
 <rule id="rule-100">
    <trueoutput>DependentChange</trueoutput>
       <conditions>
               <or>  <!-- below configuration means type change or no change
-->
                     <!-START : Dependents Workflow Rules -->
                        <equal id="personRelationshipInfo.relationship-type"
inverse="true" />
                       <equal id="personRelationshipInfo.relationship-
type"  />
                   <!--END: Dependents Workflow Rules -->
               </or>
        </conditions>
</rule>
```

With country restriction:

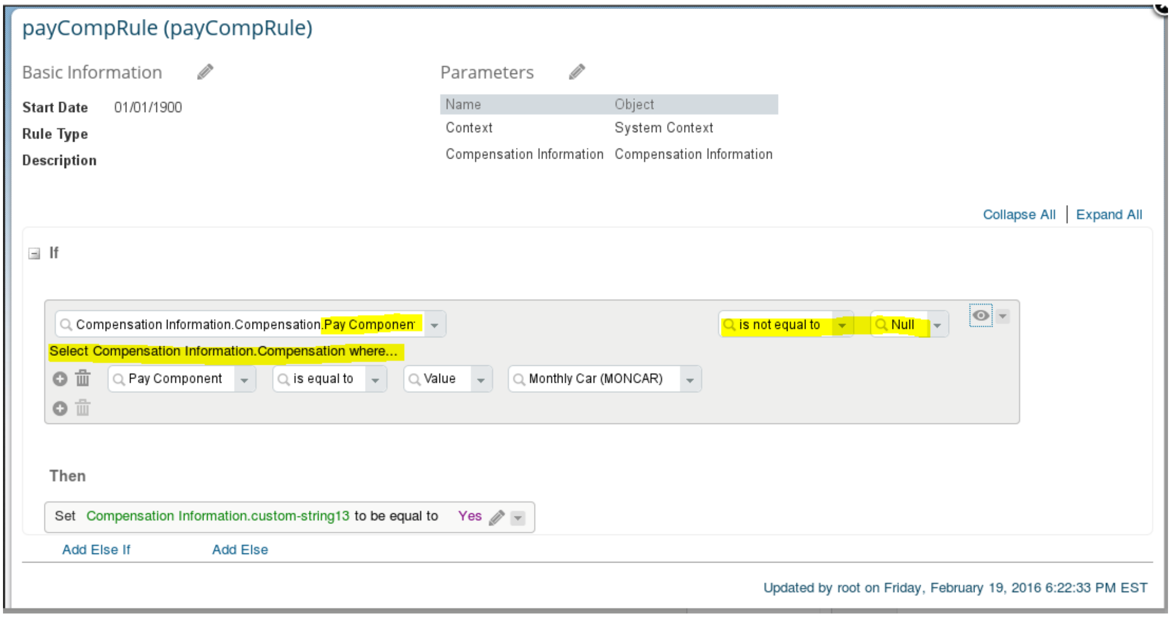
Sample Code

```
<rule id="rule-100">
 <trueoutput>DependentChange</trueoutput>
        <conditions>
           <and>
                <equal id="jobInfo.company.countryOfRegistration"
value="USA"/>      Notes: <equal id="jobInfo.country-of-company"
value="USA"/> will not work
                 <or> <!-- means type change or no change -->
                     <equal id="personRelationshipInfo.relationship-type"
inverse="true" />
                     <equal id="personRelationshipInfo.relationship-type" />
               </or>
         </and>
     </conditions>
</rule>
```

## Workflow Rule XML/ Event Reason Rule XML Doesn't Support Recurring Pay Component Value Comparison

Since the XML rule doesn't support a value comparison, you can try this workaround:

1. In *Manage Business Configuration*, define a custom field in compensation information in the data model, and make sure to set the visibility to visible = both
2. If you want this field to be displayed in the UI, give permissions for this field. If no, then no permissions are needed.
3. In *Configure Business Rules*, define a business rule. Use compensation info as the base object. If "compensation information.compensation.pay component" = xx, then set custom field = Yes




4. In *Manage Business Configuration*, in compInfo, set this rule as an onSave rule.

5. In the workflow rule.xml, make this setting: <equal id="compInfo.custom-string13" value="Yes" compareToNew="true"/>
6. Trigger the expected workflow.

## 4.4.2 Mapping Existing YouCalc Rules to Rules in the Business Rules Framework

You can define business rules to match existing YouCalc rules (in XML file).

Consider the extract of a sample YouCalc workflow XML below.

```
<rule id="rule-1">
          <trueoutput>COMMONWF</trueoutput>
          <conditions>
          <or>
                      <equalid="compInfo.pay-type"
inverse="true"/>
                      <equalid="compInfo.benefitsRate"
inverse="true"/>
                      <equalid="personalInfo.suffix" inverse="true"/>
                      <equalid="jobInfo.job-code" inverse="true"/>
                      <equalid="jobInfo.FTE"
inverse="true"/>
                      <equalid="globalAssignmentInfo.assignment-type"
compareToNew="true"/>
                 </or>
         </conditions>
         </rule>
         <rule id="rule-2">
         <trueoutput>NEWHIREWF</trueoutput>
         <conditions> <or>
                     <equal id ="jobInfo.event" value = "H"
compareToNew="true"/>
                 </or>
         </conditions>
         </rule>
```

There are two rules defined here, one intended to handle common data changes and the other to handle the new hire case. This can also be realized using the business rules framework by creating multiple rules as shown below:

1. `RULE_ID : RULE_JOBINFO_WF`
   Base Object: Job Information Model
   Rule Definition:
   IF *jobInfo.jobCode.Value* NOT EQUAL TO *jobInfo.jobCode.PreviousValue* OR *jobInfo.FTE.Value* NOT EQUAL TO *jobInfo.jobCode.PreviousValue* THEN SET *jobInfo.wfConfig.Value* = COMMONWF.
2. `RULE_ID : RULE_COMPINFO_WF`
   Base Object: Compensation Info Model
   Rule Definition:
   IF *compInfo.pay-type.Value* NOT EQUAL TO *compInfoM.pay-type.PreviousValue* OR *compInfo.benefitsRate.Value* NOT EQUAL TO *compInfo.benefitsRate.PreviousValue* THEN SET *compInfo.wfConfig.Value* = COMMONWF.
3. `RULE_ID: RULE_GLOBALASSIGNMENT_WF`
   Base Object: Global Assignment InfoModel.

Rule Definition:

IF *globalAssignmentInfo.assignment-type.Value* NOT EQUAL TO *globalAssignmentInfo.assignment-type.PreviousValue* THEN SET *globalAssignmentInfo.wfConfig.Value* = COMMONWF.

4. `RULE_ID: RULE_PERSONALINFO_WF`
   Base Object: Personal Info Model
   Rule Definition:
   IF *personalInfo.suffix.Value* NOT EQUAL TO *personalInfo.suffix.PreviousValue* THEN SET *personalInfo.wfConfig.Value* = COMMONWF.
5. `RULE_ID: RULE_NEWHIRE_WF`
   Base Object: Employee Information
   Rule Definition:
   IF *employeeInformation.jobInfo.eventReason* = New Hire (H) THEN SET *employeeInformation.wfConfig.Value* = NEWHIREWF

# 5 Configuring Workflow Features

You can configure workflow features, for example, creating a home page tile to access pending workflow requests, setting up reminders or escalation for stalled workflows, and so on.


If you use the legacy home page, you can create a pending requests tile as an extra access point to workflow requests. With this tile, users can easily review their workflow requests and act upon them.


To make sure that workflows are approved promptly, you can set up reminders for workflow requests that have been stalled at a step for too long.


You can set up escalation mechanism so that stalled workflow requests are forwarded to someone at a higher level for approval.


A workflow is prevented from proceeding to the next step if the current step's approver doesn't give a response and no automatic escalation is effective. As a result, all subsequent approvers need to wait until the workflow reaches their assigned step. This results in delayed treatment of those workflow requests. You can use a recurring job to make the system automatically check and approve workflow steps that have not been processed within a specified timeframe.


With the professional edition of *Manage Workflow Requests*, you can filter workflows with additional attributes.


Key details about workflows shown in the *My Workflow Requests* page help you make quick decisions about them. To ensure that you see relevant and informative key details, you can customize key details for various types of workflow request.


To ensure data quality, you can apply the Four-Eye Principle during workflow approval. With the feature enabled, if someone who initiated a workflow is among the resolved approvers for a step of that workflow, they'll be excluded from that step.


Approvers can approve multiple workflow requests in one go. To make sure that they review details of every workflow request before approving it, you can enable the *Prevent Quick Approval for Workflow* permission.


Companies store and maintain various types of personal data about their employees, ranging from basic details like name and date of birth, to sensitive information such as religion or medical history. Use the data blocking feature to ensure data privacy and protect personal or sensitive data used in workflows.

## 5.1 Creating a Home Page Tile for Pending Requests

If you use the legacy home page, you can create a pending requests tile as an extra access point to workflow requests. With this tile, users can easily review their workflow requests and act upon them.

### Context

You have the *Manage Home Page* permission.

### Procedure

1. Go to *Admin Center* > *Manage Home Page* and add a custom tile.
2. In the *General* step, specify a tile name and provide a description.
3. In the *Tile* step, define the following:
   - Tile type: whether it's a static tile with a title only or a graphic tile with a picture as the background.
   - Language of the tile.
   - Title displayed on the tile.
4. In the *Navigation* step, add the URL target: `/xi/ui/ect/pages/pendingWorkflows/pendingWorkflowV12.xhtml`
5. In the *Assignments* step, do the following:
   - Assign the tile to the *My Info* tile group.
   - Select a user group who can access this tile.
6. Save the tile.

### Results

The tile has now been added, and users of the selected user group can access the tile. Make sure that user group has the permission to the *My Info* tile group.

### Related Information

List of Role-Based Permissions
User Permissions for the Home Page
Enabling the New Home Page

## 5.2 Reminders About Stalled Workflows

To make sure that workflows are approved promptly, you can set up reminders for workflow requests that have been stalled at a step for too long.

You can define a period (in days) and when there is no action from approvers for the defined period, a reminder is sent. The period can be defined in either the workflow object itself or the recurring reminder job that triggers reminders.

Defining it in the workflow objects allows you to be flexible with different workflows. For example, you might want to have more frequent reminders for promotion-related workflows than for job relationship-related workflows. For simple data changes, you might even decide not to have any reminders at all.

Defining it centrally in the recurring job offers a simplified way of setting up reminder intervals, because the number of days defined there applies to all workflows in the systems.

However, if you have defined *Remind in Days* at both places, the value entered for the job prevails.

### Recurring Reminders

Reminders are recurring, that is, if there is no action from the approvers after the first reminder, they will be reminded again.

For example, you have set *Remind in Days* to 2. If no action has taken place for that workflow within the first 2 days at a step, additional reminders are sent on day 4, then on day 6, and so on, until current approvers act on that workflow. The action could be adding a comment or changing approvers in the workflow.

Let's say the current approver gets a reminder on day 2. The approver then makes a minor change on the third day, like adding a comment, and then again leaves the workflow pending for another two days. The next reminder is sent on day 5. This behavior is repeated until the approver finally approves or rejects the workflow.

### 5.2.1 Creating a Recurring Job to Send Batch Reminders About Stalled Workflows

Create a recurring job to send batch reminders for all stalled workflows in the system.

### Context

In the recurring job, you can define a specific number of days as the reminder interval for all workflows in the system. For detailed instructions on creating and submitting a general job request, see Scheduling Jobs in *Related Information*.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

## Procedure

1. In Provisioning, go to *Managing Job Scheduler* > *Manage Scheduled Jobs*.

    → Tip

    You can now create, schedule, and monitor the job also in *Admin Center* > *Scheduled Job Manager*. The daily execution limits for the Workflow Action Reminder job are: 1 time for a one-time job and 1 time for a recurring job.

2. On the *Manage Scheduled Jobs* page, choose *Create New Job*.
3. Specify a job name and a job owner.

    Job owners have the authorization to submit or start a job. They will also be the default user to receive email notifications about the job status.
4. Select *Workflow Action Reminder* as the job type. Afterwards, the Remind in Days setting is displayed as a job parameter.
5. Specify the number of days, after which the job will remind approvers if they haven't acted upon workflow requests.

    Leave the field empty and the job will use the number of days you define in an individual workflow to determine when a reminder is to be sent to the approvers.
6. **Optional:** Indicate whether you want to include workflow initiators in the reminders as well.
7. In the *Job Occurrence & Notification* section, specify how often and when the job is run, add additional recipients as necessary (for example, HR admin), and specify whether a notification is sent when the job starts.

    → Tip

    To make sure that approvers of the stalled workflows are reminded promptly, we recommend that you set it as a daily job.

    i Note

    If you also have a recurring job for escalations, make sure that two jobs are not running at the same time. To avoid that, you can make one job as the dependent job of the other one.

    In this section, you can also define an active period for the recurring job. If you do not have a specific end date, enter **99991231** as an infinite future date.
8. Click *Create Job* to save it.
9. If you are the owner of the job, back in the job list, submit it so that it starts running.

## Results

The job will start running during the active period. The approvers of stalled workflows will receive a reminder email. The same template of workflow request notification is used, with “Reminder” added to the subject.

## Related Information

Defining Workflow Email Notifications [page 83]
Creating an Individual Workflow [page 24]
Managing Scheduled Jobs in Provisioning
Managing Scheduled Jobs in Admin Center

# 5.3 Automatic Workflow Escalation

You can set up escalation mechanism so that stalled workflow requests are forwarded to someone at a higher level for approval.

## How Escalation Works

With a defined escalation path and criteria, when a workflow is stalled for the specified number of days, the workflow is automatically escalated to a specified user, or an "escalation receiver". The workflow now sits in the to-do list of the new approver and can no longer be approved by the original approver.

The new approver can directly approve the request or, after talking to the original approver offline, decline or send back the escalation. When the escalation is declined or sent back, the workflow goes back to the original approver.

When the workflow is escalated, the original workflow approver can also revoke the escalation to process the workflow themselves later.

## Recurring Escalation

If there are multiple escalation steps and the first escalation approver doesn’t act upon it for a certain number of days, the workflow is then escalated to the next step. To make sure that a workflow will be acted upon in time, you can define the last of the escalation steps as recurring. The workflow will be escalated up the organization until it is approved.

## Limitations

- You cannot escalate the workflow and then delegate it. You can only delegate it first and then escalate it.
- When automatic approval is enabled for a step, that step won't have escalation.
- If there is no valid approver (based on the selection *Stop the Workflow* in the field *No Approver Behavior*), then the workflow will not be escalated automatically.
- We don't support Dynamic Group, Dynamic Role, Position and Position Relationship in the escalation *targetValue* field. If there is an escalation from A to B, then user B cannot be multi-user (B can only be one of the following single-user types: Manager, Manager Manager, and HR manager) but A can be multi-user (such as Dynamic Group, Dynamic Role, Position and Position Relationship).
- The escalator will not have a to-do item.
  For example, after escalation from A to B, the to-do from A will be deleted and A will not have a to-do item for that workflow anymore. If the escalation goes further, meaning A->B->C, then both A and B will no longer have to-dos. A and B can access the workflow from the *Pending Requests* > *Requests waiting for my approval* page.
  In an escalation scenario with more than 2 levels of escalation, meaning A->B->C->D, only the original approver (A) and last escalator (C) and escalatee (D) can see the request from the *Pending Requests* page. The middle user (B) cannot see the pending request.

1. Setting Up an Escalation Path [page 67]
   Specify when a workflow is escalated and to whom. You can define multiple steps in the escalation path, and when the workflow request continues to be stalled, the escalation will be sent to different people along the sequence of steps.
2. Creating a Recurring Job for Workflow Escalation [page 70]
   The recurring job is run regularly to check for stalled workflows that have not been acted upon by approvers for a certain number of days and to trigger escalation.

# 5.3.1 Setting Up an Escalation Path

Specify when a workflow is escalated and to whom. You can define multiple steps in the escalation path, and when the workflow request continues to be stalled, the escalation will be sent to different people along the sequence of steps.

## Prerequisites

You have the *Manage Data* permission.

## Procedure

1. Go to *Admin Center* > *Manage Data* > *Create New*, and select *Escalation*.
2. Enter a name and a code for the escalation.
3. Define escalation steps. For each step, specify the following:

| Setting | Description |
| --- | --- |
| **Escalation Route From** | Select the starting point of the escalation. It can be one of the following:<br>• Current Approver<br>The approver of the workflow before the current escalation step. If used in the first step of the escalation, it represents the original approver of the workflow. If used in any other steps, it represents the escalation approver of the previous step.<br>• Original Approver<br>The original approver of the workflow.<br>• Subject Employee<br>The subject employee of the workflow.<br>• Initiator<br>The workflow approver. |
| **Target Value** | Specify the receiver of the escalation, that is, the person to whom the workflow is escalated. It can be manager, manager's manager, or HR. |
| **Escalation After Days** | Specify the number of calendar days, after which, if there is still no action from the person defined in the *Escalation Route From* field, the escalation is triggered. |

## Results

The escalation path has been defined and it is available for selection when you set up a workflow.

## Next Steps

Assign the escalation path to workflows in the *Manage Organization, Pay and Job Structures* admin tool.

Create a recurring job that checks for stalled workflows and triggers escalation on a regular basis.

Example: A Three-Step Escalation Path [page 69]
In this example, you define a three-step escalation path to make sure that a job change workflow is acted upon timely.

Example: A Recurring Escalation Step [page 69]
You want to define a recurring escalation step: if the workflow stalled at the escalation approver, it will be escalated up the organization until it is approved.

**Task overview:** Automatic Workflow Escalation [page 66]

**Next task:** Creating a Recurring Job for Workflow Escalation [page 70]

## Related Information

List of Role-Based Permissions
Creating an Individual Workflow [page 24]

### 5.3.1.1 Example: A Three-Step Escalation Path

In this example, you define a three-step escalation path to make sure that a job change workflow is acted upon timely.

After two days being stalled at the approver, the workflow is escalated from the current approver to the current approver's manager. In case that the current approvers manager hasn't reacted in three days, the workflow is then escalated to the original approver's *Manager Manager*. If the individual in the *Manager Manager* role hasn't reacted within five days, the HR manager of the *subject user* receives the workflow for approval. Note that the number you enter in the *Escalation After Days* field specifies how many days elapse after the workflow was initiated.

For this scenario, let's assume the workflow is initiated on Monday, June 1 and the escalation path will look like as follows:

| Step ID | Escalation Route From | Target Value | Escalation After Days | Occurs On |
|---|---|---|---|---|
| 1 | Current Approver | Manager | 2 | Wed., June 3 |
| 2 | Original Approver | Manager Manager | 3 | Thu., June 4 |
| 3 | Subject Employee | HR | 5 | Sat., June 6 |

### 5.3.1.2 Example: A Recurring Escalation Step

You want to define a recurring escalation step: if the workflow stalled at the escalation approver, it will be escalated up the organization until it is approved.

You can define the escalation step as follows:

| Step ID | Escalation Route From | Target Value | Escalation After Days |
|---|---|---|---|
| 1 | Current Approver | Manager | 4 |

In the above sample step, the workflow is set up to be escalated after four days to the current approver's manager. If after another four days the approver manager hasn't acted upon the request yet, the workflow will be escalated to the manager's manager. If there is no response, the workflow will be escalated every four days up the organization until it is approved.

→ Tip

Use such a recurring step as the last step of a multi-step escalation path or as the only step in a escalation path.

## 5.3.2 Creating a Recurring Job for Workflow Escalation

The recurring job is run regularly to check for stalled workflows that have not been acted upon by approvers for a certain number of days and to trigger escalation.

### Prerequisites

You have defined email templates for escalation. You can customize standard templates by adding tags. The following templates are available:

- Workflow Action Escalate Notification
- Workflow Action Escalate Revoke Notification
- Workflow Action Escalate Decline Notification

### Context

For detailed instructions on creating and submitting a general job request, see Scheduling Jobs in *Related Information*.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

### Procedure

1. In Provisioning, go to *Managing Job Scheduler* > *Manage Scheduled Jobs* and create a new job.

   → Tip

   You can now create, schedule, and monitor the job also in *Admin Center* > *Scheduled Job Manager*. The daily execution limits for the Workflow Auto Escalation job are: 1 time for a one-time job and 1 time for a recurring job.

2. On the *Manage Scheduled Jobs* page, choose *Create New Job*.
3. Specify a job name and a job owner.

   Job owners have the authorization to submit or start a job. They will also be the default user to receive email notifications about the job status.
4. Select the *Workflow Auto Escalation* as the job type.
5. In the *Job Occurrence & Notification* section, specify how often and when the job is run, add additional recipients as necessary (for example, HR admin), and specify whether a notification is sent when the job starts.

   > → Tip
   >
   > To make sure that stalled workflows are acted upon promptly, we recommend that you set it as a daily job.

   > i Note
   >
   > If you also have a recurring job for reminders, make sure that the two jobs are not running at the same time. To avoid it from happening, you can make one job as the dependent job of the other one.

   In this section, you can also define an active period for the recurring job. If you do not have any specific end date, enter **99991231** as an infinite future date.
6. Click *Create Job* to save it.
7. If you are the owner of the job, back in the job list, submit it so that it starts running.

### Results

The job will start running during the active period. The stalled workflows are escalated according to the escalation path and escalation days.

**Task overview:** Automatic Workflow Escalation [page 66]

**Previous task:** Setting Up an Escalation Path [page 67]

### Related Information

Managing Scheduled Jobs in Provisioning
Managing Scheduled Jobs in Admin Center

## 5.4 Automatic Approval for Stalled Workflows

A workflow is prevented from proceeding to the next step if the current step's approver doesn't give a response and no automatic escalation is effective. As a result, all subsequent approvers need to wait until the workflow reaches their assigned step. This results in delayed treatment of those workflow requests. You can use a recurring job to make the system automatically check and approve workflow steps that have not been processed within a specified timeframe.

## 5.4.1 Enabling the Days Until Auto Approval Field

Before creating a recurring job for automatic approval, you must configure a new data field and make it available on the workflow configuration UI. Users can then enter a value for it to specify how many days elapse before a workflow step is automatically approved.

### Procedure

1. Go to *Admin Center* > *Import/Export Corporate Data Model*.
2. Export the data model template, open it with a text editor, and paste the following code into it.

   Sample Code

   ```
   <hris-element id="wfStepApprover">
   ...
   <hris-field id="autoApproveInDays" visibility="both">
   <label>Days until Auto Approval</label>
   </hris-field>
   ...
   </hris-element>
   ```

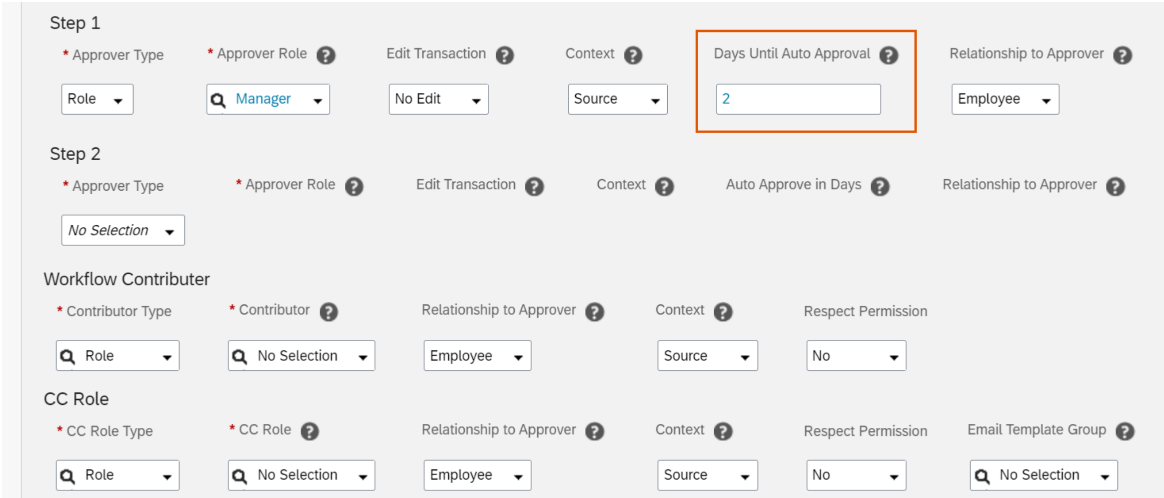
   → Tip

   To ensure the label displays in a proper locale, consider adding variations in all other required languages.

   i Note

   After you've enabled the *Days until Auto Approval* field and assigned a value to it, you cannot turn off the feature by removing the code snippet from the data model template. That only hides the field from UI. To turn off the feature, leave the field empty.
3. Save the file and import it back into the system.

   This is how the field looks on the UI after you enable it.




## Results

The field, with the name specified in the code snippet (“Days until Auto Approval” in this case), appears on the UI and you can specify a value for it when defining a workflow configuration.

In this context, one day means a continuum of 24 hours; in other words, passing the midnight does not necessarily mean one day has elapsed. From the moment the workflow is triggered, the system will count the hours, convert the hours into days, and automatically approve workflow steps that have reached the defined threshold.

> **Example**
>
> If you trigger a workflow at 12:00 p.m. (noon) today, the *Days until Auto Approval* field is set to 1 day, and the job for auto approval runs daily at 02:00 a.m., then the auto approval will not happen at 02:00 a.m. tomorrow (because only 14 hours have elapsed); instead, it will be picked up by the job on the day after tomorrow and happen some 38 (14+24) hours after the workflow was triggered.

# 5.4.2 Creating a Recurring Job for Automatic Approval

After you've enabled the *Days until Auto Approval* field, you can create a recurring job that automatically checks and approves steps of stalled workflows.

## Prerequisites

You have enabled `autoApproveInDay` in the corporate data model so that the *Days until Auto Approval* field shows on the workflow configuration page. For more information, see Enabling the Days until Auto Approval Field in *Related Information*.

## Context

For detailed instructions on creating and submitting a general job request, see Scheduling Jobs in *Related Information*.

## Procedure

1. In Provisioning, go to *Managing Job Scheduler* > *Manage Scheduled Jobs*.

   > → Remember
   >
   > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

2. On the *Manage Scheduled Jobs* page, choose *Create New Job*.
3. Specify the job name and the job owner.

   Job owners have the authorization to submit or start a job. They will also be the default users to receive email notifications about the job status.

   > i Note
   >
   > The owner of the recurring job, instead of the original approver of the stalled step, will be shown as the approver on the *Workflow Details* page or other similar pages.

4. For the job type, select *Workflow Auto Approval*.
5. In the *Job Occurrence & Notification* section, specify how often and when the job is run, add additional recipients as necessary (for example, HR admin), and specify whether a notification is sent when the job starts.

   > → Tip
   >
   > To ensure stalled workflows are acted upon sooner, we recommend that you set it as a daily job. You can also define an active period for the recurring job. If you do not have a specific end date, enter **99991231** as an infinite future date.

   > i Note
   >
   > In case you also have a recurring job for reminders, make sure that the two jobs don't run at the same time. For example, you can make one job as a dependent job of the other.

6. Choose *Create Job* to save your job.
7. If you are the owner of the job, submit it and have it started; otherwise, ask the owner to start it.

### Results

The job runs during the specified active period. When a step hasn't been responded to within the predefined timeframe, the system automatically approves it and allows the workflow to proceed to the next step.

### Next Steps

Browse for an existing workflow that you think might benefit from this auto-approval feature. Enable the feature by entering a number in the *Days until Auto Approval* field. This number specifies how many days elapse before this recurring job prompts the system to auto-approve a non-responsive step. Please note that 1 day in this context means 24 hours. See the example in Enabling the Days Until Auto Approval Field.

### Related Information

Enabling the Days Until Auto Approval Field [page 72]
Managing Scheduled Jobs in Provisioning

## 5.5 Enabling the Professional Edition of Manage Workflow Requests

With the professional edition of *Manage Workflow Requests*, you can filter workflows with additional attributes.

### Prerequisites

You have access to the *Manage Permission Roles* admin tool.

You've enabled the new Home Page.

### Context

If the professional edition of *Manage Workflow Requests* isn't enabled, choosing the *Approve Requests* tile opens a popup window where you can choose the *Go to Workflow Requests* button to land on the normal edition of *My Workflow Requests* page. After the professional edition is enabled, you'll be directly taken to a more advanced edition of *My Workflow Requests*, where you can find additional filters such as Company, Location, Cost Center, Business Unit, Division, Department, and Assignment.

> **Note**
>
> These filters aren't relevant for hire and rehire workflows.
>
> Business Unit, Division, and Department aren't relevant for changes to generic objects. The three filters are disabled when the approvers are filtering for workflow requests of the Change Generic Object Actions type.

### Procedure

1. In *Admin Center*, go to *Manage Permission Roles* and open the permission setting list of the relevant role.
2. In permission settings, go to *Administrator Permissions* > *Manage Workflows* and enable *Professional Edition Manage Workflow Requests*.
3. Save the updated permission settings.

### Results

In the professional edition of *Manage Workflow Requests*, you can scroll down to load more workflow requests, view customizable key details of them, apply filters, and perform batch approvals.

## 5.6 Customizing Key Details of Workflow Requests for Quick View

Key details about workflows shown in the *My Workflow Requests* page help you make quick decisions about them. To ensure that you see relevant and informative key details, you can customize key details for various types of workflow request.

### Context

Key details summarize what's important about a workflow. For example, you can define two fields, Position Title and Cost Center, for Position (as an MDF object) to be shown as key details. In the *My Workflow Requests* page, for each workflow involving Position, its position title and cost center information will be shown in the *Key Details* column. By taking a quick glance, you know what those workflow requests are about and what you need to do.

Only workflows related to the MDF object **Position** are supported now.

## Procedure

1. Go to *Admin Center* > *Manage Data*, and start to create an instance of the *Advanced To-do Key Details* object.
2. Name the instance and assign a code to it.

   > **Note**
   >
   > Each company can have only one instance of the *Advanced To-do Key Details* object. You can edit an existing instance, or delete it and create a new one.

3. Select an MDF object (Position) and choose *Details*.

   > **Note**
   >
   > Each MDF object can have only one Key Details setting. You can edit the existent setting, or delete it and create a new one.

4. In the window that appears, select fields and specify whether these fields should show external codes.

   > **Note**
   >
   > For each Key Details setting, you can select up to four fields and they should be different from each other.

5. When you finish selecting the fields, choose *Done*.
6. Back to the instance creation page, choose *Save*.

## Results

You have customized key details for workflow requests with a particular MDF object (Position). When such workflow requests show on the *My Workflow Requests* page, you'll see the key details you've selected; and if there's any change to the fields involved, such a change is highlighted for attention.

# 5.7 Enabling Four-Eye Principle for Workflow Approvals

To ensure data quality, you can apply the Four-Eye Principle during workflow approval. With the feature enabled, if someone who initiated a workflow is among the resolved approvers for a step of that workflow, they'll be excluded from that step.

## Prerequisites

You have the *Platform Feature Settings* permission.

## Context

The Four-Eye Principle is widely used as an internal control mechanism that requires that a decision, a transaction, and so on be controlled (reviewed, double checked) by a second individual that is independent and competent. It's used in Employee Central Workflows in a slightly different way.

The employee who initiates the workflow might turn out to be a resolved approver of these approver types: Dynamic Role, Dynamic Group, Position, or Position Relationship. With the Four-Eye Principle enabled, the system normally excludes the initiator from an approval step and no approval request is sent to the initiator, but there is one exception: when one approver of the workflow has designated that initiator as delegatee, either manually or through auto-delegation, then the initiator will receive approval requests and can act on behalf of the delegator to process the workflow.

The Four-Eye Principle doesn't apply to these single-user roles: Self, Manager, Manager Manager, and Employee HR. It's applicable for all other single-user roles and multi-user roles.

> **i Note**
>
> In a workflow object for to-do alerts, the Four-Eye Principle applies to the owner of the EC Alerts and Notifications job. If the job owner is also the resolved alert recipient, they will not receive the alert.

If the initiator is the only approver of a step, how the workflow behaves depends on the specified no-approver behavior:

- *Skip This Step*
  The step is skipped. The workflow is either routed to the next step if it has one or ended if it has no more step.
- *Stop The Workflow*
  The workflow is stalled at the approval step. The admin can later process it in *Manage Workflow Requests* admin tool.

## Procedure

1. Go to *Admin Center* > *Platform Feature Settings*.
2. Enable *Enforce Four-Eyes Principle on Workflow Step Approval*.
3. Save the settings.

## Results

The Four-Eye Principle feature has been enabled. If the workflow initiator is also the approver, they'll be excluded from the approval step.

## 5.8 Preventing Quick Approval for Multiple Workflows

Approvers can approve multiple workflow requests in one go. To make sure that they review details of every workflow request before approving it, you can enable the *Prevent Quick Approval for Workflow* permission.

### Prerequisites

You have the access to the *Manage Permission Roles* admin tool.

### Context

When the *Prevent Quick Approval for Workflow* permission has been enabled for approvers, they cannot approve multiple workflow requests in the *Approve Requests* dialog or on the *My Workflow Requests* page. They must open each workflow request, review the details, and approve it individually.

### Procedure

1. Go to *Admin Center* > *Manage Permission Roles* and open the permission setting list for the relevant role.
2. Go to *Administrator Permissions* > *Manage Workflows* and select *Prevent Quick Approval for Workflow*.
3. Save the updated permission settings.

### Results

Employees having this role now cannot approve multiple workflows at once.

## 5.9 Data Blocking for Workflow Data

Companies store and maintain various types of personal data about their employees, ranging from basic details like name and date of birth, to sensitive information such as religion or medical history. Use the data blocking feature to ensure data privacy and protect personal or sensitive data used in workflows.

Data blocking allows you to restrict access to completed workflows (those in the approved, rejected, or canceled status) to a controlled number of users. You can further configure the feature by defining a timeframe, limiting what they can view to workflows that were completed within this timeframe.

1. Enabling Data Blocking for Completed Workflows [page 80]
   Access to completed workflows can be restricted to users with special role-based permissions (RBP). Add the permission first and grant it to relevant users.
2. Granting Permission for Viewing Completed Workflows [page 81]
   Only users who have proper permissions can access workflows that are completed. In addition, administrators can apply a timeframe to the permission so the permitted users are only allowed to view workflows that are completed within this timeframe.

### Related Information

Data Blocking

## 5.9.1 Enabling Data Blocking for Completed Workflows

Access to completed workflows can be restricted to users with special role-based permissions (RBP). Add the permission first and grant it to relevant users.

### Prerequisites

You have the *Platform Feature Settings* permission.

### Procedure

1. Go to *Admin Center* > *Platform Feature Settings*.
2. Select *Add Permission: View Completed Workflows*.
3. Save your changes.

### Results

A new permission, *View Completed Workflows*, is available among the RBPs for *Manage Workflows*.

#### Next Steps

Grant this permission to users who need access to completed workflows.

**Task overview:** Data Blocking for Workflow Data [page 79]

**Next task:** Granting Permission for Viewing Completed Workflows [page 81]

#### Related Information

List of Role-Based Permissions

## 5.9.2 Granting Permission for Viewing Completed Workflows

Only users who have proper permissions can access workflows that are completed. In addition, administrators can apply a timeframe to the permission so the permitted users are only allowed to view workflows that are completed within this timeframe.

#### Context

When CC roles receive workflow notifications, the workflows are already completed. So, this permission also affects whether and how they receive some notifications. Email notifications are sent to CC roles anyway, but without the permission, CC roles do not receive system notifications in *My Pending Requests*.

If CC roles are granted this permission with a timeframe restriction, completion notifications of the workflows that they aren't allowed to view anymore are automatically removed from the notification list of their *My Pending Requests*.

#### Procedure

1. Go to *Admin Center* > *Manage Permission Roles*.
2. Assign the *View Completed Workflows* permission to relevant user roles.

   You can find this permission under *Manage Workflows*.
3. **Optional:** Apply a timeframe to the access.

In *Permission Role Detail*, go to ▶ *Grant this role to...* ▶ *Edit Granting* ▶ *Data Access Period Settings* ▶ *Completed Workflows* ◀. Select *Restricted* and enter a number from 0 to 999 to specify a period in months. Permitted users can view workflows that are completed within this period.

| Number | Means... |
| --- | --- |
| 0 | Permitted users can only view workflow requests that were completed today. |
| Any number between 1 and 999 | Indicates a past period in months. For example, if you set it to 5, they can only view workflow requests completed within the past 5 months. |

> i Note
>
> If a user has multiple role-based permissions with different Completed Workflows access periods, the longest period applies.

4. Save your changes.

## Results

Only permitted users can view completed workflows. If you have also applied a timeframe, they can only view workflows that were completed within the specified period.

**Task overview:** Data Blocking for Workflow Data [page 79]

**Previous task:** Enabling Data Blocking for Completed Workflows [page 80]

## Related Information

Permission Role Assignments

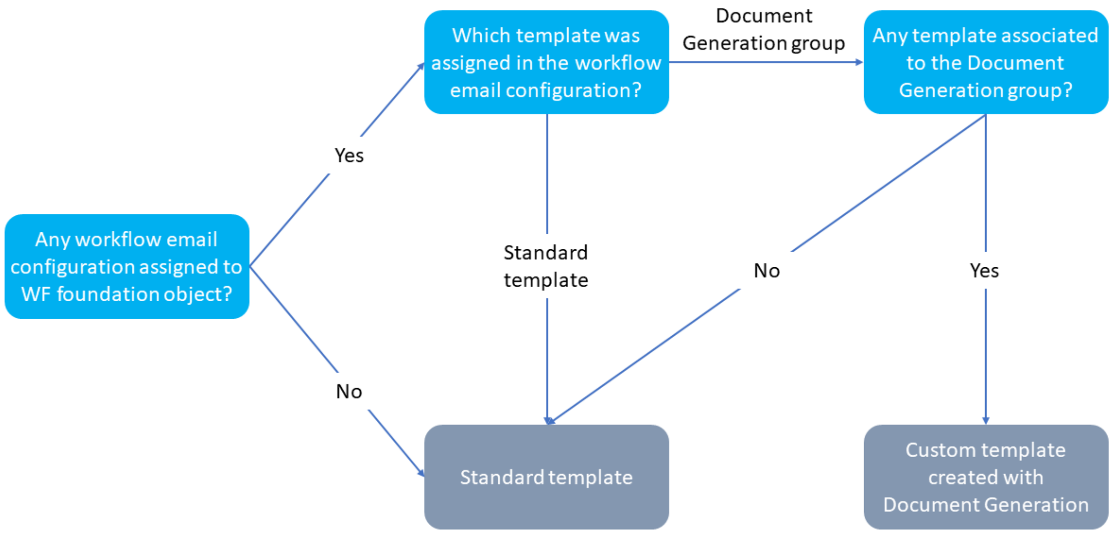
# 6 Defining Workflow Email Notifications

Upon a workflow action, such as initiation, approval, and rejection, workflow participants receive to-do alerts as well as email notifications.

To define these notifications, you can use standard templates or create custom ones with Document Generation. Document Generation allows you to tailor-make templates for different roles and various workflow actions.

> **i Note**
>
> Emails are sent when there's an update to a workflow auto-delegation request, for example when it's sent, accepted, rejected, or withdrawn. Such emails are hardcoded and users cannot customize the text, language, or layout.

Based on your template configurations, the following diagram shows how the system determines which template to use when creating email notifications:




[Editing Standard Templates [page 84]]
Standard email templates are available for each workflow action, for example, when a workflow is approved or rejected. You can also modify these templates using a variety of supported text tags, which represent variable user or event information.

[Creating Custom Templates with Document Generation [page 92]]
Document Generation enables you to create and manage custom documents, including workflow email templates that use both text and images. Being able to create and assign templates more flexibly, you can have custom notification text for different participant types.

[Creating a Workflow Email Configuration [page 94]]

A workflow email configuration is a set of email notification templates to be used at various workflow steps. You can build a workflow email configuration with all custom templates created with Document Generation or with a combination of both standard and custom templates.

Setting Up Custom Workflow Notifications [page 95]

Administrators can create custom email notification templates for each of the major workflow actions and for specific email recipients. Within these templates, administrators can go beyond existing workflow tags to define variables that provide more useful information to the workflow participants. Administrators also have the flexibility to turn off the notifications when necessary.

# 6.1 Editing Standard Templates

Standard email templates are available for each workflow action, for example, when a workflow is approved or rejected. You can also modify these templates using a variety of supported text tags, which represent variable user or event information.

## Prerequisites

You have the *E-mail Notification Templates Settings* permission. You can find it under *Administrator Permissions* > *Manage System Properties* in *Manage Permission Roles*.

## Procedure

1. Go to *Admin Center* > *E-Mail Notification Templates* and select the workflow email template that you want to customize.
2. Scroll down to the section where you can edit the email template.
3. The system shows the email subject and body in the current signed-in locale. If the template has never been modified, you see this message: *You do not have a template created for the selected language, this is the recommended <locale name> locale template*.
4. Modify the text of the email subject or body as needed, and use the tags to represent user or event information, for example, **[[CREATED_USER]]** for workflow initiator and **[[EVENT_REASON]]** for the event reason of the data change.

   > **i Note**
   >
   > You should use EVENT_REASON, instead of HRIS_ACTION. Besides, we suggest that you review all your existing email notifications and look for HRIS_ACTION, which should be replaced by EVENT_REASON.

5. **Optional:** To define the template text for other locales, select the language name in the locale list and then work on the text as needed.

6. Save the changes you've made to the standard template.

## Results

The template is updated, and the system uses the updated template to generate relevant workflow notification emails.

**Task overview:** Defining Workflow Email Notifications [page 83]

## Related Information

Creating Custom Templates with Document Generation [page 92]
Creating a Workflow Email Configuration [page 94]
Setting Up Custom Workflow Notifications [page 95]

# 6.1.1 Available E-mail Templates for Employee Central Workflows

You have standard e-mail templates for different workflow-related scenarios. The table below lists all e-mail templates and their target users (such as approver types).

Table 4: Available E-mail Templates for Workflows

| E-mail Template Name | Description | Target User |
|---|---|---|
| Workflow Action Approval Notification | Sends e-mail notifications on completion of a workflow. | Initiator<br>Contributor |
| Workflow Action Rejected Notification | Sends e-mail notifications on rejection of a workflow. | Initiator, current approvers, approvers before the current step who have already approved this request (in a step if there are more than one person who can approve the request, this notification is only sent to the person who actually approved it), contributors |
| Workflow Action Pending Notification | Sends e-mail notifications to current approvers at every approval step (except the final one) and initiation of a workflow. | Current approvers |

| E-mail Template Name | Description | Target User |
|---|---|---|
| Workflow Action Canceled Notification | Sends e-mail notifications on cancellation of the workflow. | Initiator, current approvers, approvers before the current step who have already approved this request (in a step if there are more than one person who can approve the request, this notification is only sent to the person who actually approved it), contributors |
| Workflow Action Skipped Notification | Sends e-mail notifications when the admin skips a user on a workflow. | Skipped user |
| Workflow Comment Posted Notification | Sends e-mail notifications when a comment is posted on a workflow. | Initiator<br>Contributor<br>Previous step approver<br>Current approvers |
| Workflow Action Lockdown Notification | Sends e-mail notifications when the admin locks down a workflow. | Initiator<br>Contributor<br>Previous step approver<br>Current approvers |
| Workflow Action Unlock Notification | Sends e-mail notifications when the admin unlocks a workflow. | Initiator<br>Contributor<br>Previous step approver<br>Current approvers |
| Workflow Action Contributor Notification | Sends e-mail notifications when a workflow is initiated. | Contributors |
| Workflow Action CC Role Notification | Sends e-mail notifications on the completion of a workflow. | CC Users |
| Workflow Step Approved Notification | Sends e-mail notifications to the initiator and contributors on approval of every step in a workflow. | Initiator<br>Contributors |
| Workflow Sent Back Notification | Sends e-mail notifications to the initiator, previous approver, and contributors when the approver sends back a workflow to the initiator. | Initiator<br>Contributor<br>Previous step approver<br>Current step approvers |

| E-mail Template Name | Description | Target User |
|---|---|---|
| Workflow Action Delegate Notification | Sends e-mail notifications when a workflow request is delegated. | Delegatee receiving pending email<br>Initiator receiving delegation notification email |
| Workflow Action Delegate Revoke Notification | Sends e-mail notifications when the delegator revokes a delegation request. | Delegatee<br>Initiator |
| Workflow Action Delegate Decline Notification | Sends e-mail notifications when the delegatee declines a delegation request. | Delegator receiving pending email<br>Initiator receiving delegate decline email |
| Workflow Action Escalate Notification | Sends e-mail notifications when a workflow request has been escalated. | Initiator<br>Escalatee<br>Escalator |
| Workflow Action Escalate Revoke Notification | Sends e-mail notifications when the previous approver revokes a workflow escalation request. | Initiator<br>Escalatee |
| Workflow Action Escalate Decline Notification | Sends e-mail notifications when the new approver declines a workflow escalation request. | Initiator<br>Escalator |

## 6.1.2 Available Workflow Tags for E-mail Notifications

The table below lists all workflow-specific and generic tags you can use for e-mail notifications. You can use tags that are specific for workflows, which must have the mapping type *Reference*.

> → Tip
>
> You can use the *Data Type* filter to specify whether you want to view workflow-specific or generic tags. For all other columns, you can search for specific text.

Table 5: This Table Contains All Tag Types That Include the Tag Name and Descriptions

| Tag Type | Tag Name | Description |
|---|---|---|
| Workflow | `[[ACTION_TYPE]]` | The action that the *subject-user* has performed, which identifies when object has been created, updated, or deleted.<br><br>**Note**<br>Relevant for *Foundation Object* (FO) workflows. |
| Workflow | `[[APPROVAL_CHAIN]]` | The approval chain up to the current user who gets an e-mail notification.<br><br>Usually a step approver that is added to an approval chain only when that user approves the workflow. If the first step approver declines the workflow, the approval chain tag would hold the initiator value. |
| Workflow | `[[CREATED_USER]]` | The individual who created the workflow. |
| Workflow | `[[CREATED_TIME]]` | Date/time at which the workflow was created.<br><br>The company'a default date format is adopted. |
| Workflow | `[[CREATED_PERSON_ID_EXTERNAL]]` | Represents `Person ID external` of the individual who created the workflow |
| Workflow | `[[CREATED_USER_EMAIL]]` | E-mail address of the user who initiated the change. This tag is used as a unique identifier for that individual. |
| Workflow | `[[CURRENT_OWNER]]` | Can be any of the following:<br>• Current owner of a workflow who is also working on the workflow.<br>• Individual who rejects the workflow when they are also an approver. |
| Workflow | `[[DELEGATOR]]` | Individual who delegated the workflow to a delegatee.<br><br>**Note**<br>Supports workflow delegation |

| Tag Type | Tag Name | Description |
| --- | --- | --- |
| Workflow | [[DELEGATEE]] | The individual who was designated to handle a workflow on behalf of others.<br>**i Note**<br>Supports workflow delegation |
| Workflow | [[EFFECTIVE_DATE]] | The effective start date of the suggested change |
| Workflow | [[END_DATE]] | Time off (employee time) end date. |
| Workflow | [[ESCALATION_PREV_APPROVER]] | The previous approver from whom the workflow was escalated. |
| Workflow | [[ESCALATION_NEW_APPROVER]] | The new approver to whom the workflow is escalated. |
| Workflow | [[EVENT]] | The event associated with the workflow. |
| Workflow | [[EVENT_REASON]] | Event reason associated with the workflow.<br>**i Note**<br>You should use EVENT_REASON, instead of HRIS_ACTION. Besides, we suggest that you review all your existing email notifications and look for HRIS_ACTION, which should be replaced by EVENT_REASON.<br>**i Note**<br>If a block is used that does not use event reasons, the system derives the event reason from a combination of the label and adds a concatenated respective model name, for example, for changes such as: personal info, national ID, home address, global assignment, pension payout, dependents, or work permit changes. |
| Workflow | [[INITIATOR_COMMENT]] | The first comment made by the initiator while triggering the workflow. |
| Workflow | [[PERSON_ID_EXTERNAL]] | Person ID external of the subject user. |
| Workflow | [[RECENT_APPROVAL_DATE]] | Shows the latest approved step along with the last modified date. |

| Tag Type | Tag Name | Description |
|---|---|---|
| Workflow | [[RECENT_COMMENT_POSTED]] | Recently posted comment on workflow by the approver or contributor. |
| Workflow | [[RECENT_COMMENT_POSTED_BY]] | Full name of the user who recently posted the comment. |
| Workflow | [[RECENT_COMMENT_POSTED_DATE]] | Date/time when the latest comment was posted |
| Workflow | [[RECENTLY_APPROVED_BY]] | The name of the user who recently approved the workflow request. |
| Workflow | [[RECENTLY_APPROVED_BY_COMMENT ]] | Comments entered by the user who recently approved the workflow request. |
| Workflow | [[RECIPIENT_NAME]] | Full name of the e-mail recipient |
| Workflow | [[RECIPIENT_USERNAME]] | The user name of the recipient |
| Workflow | [[REJECTED_BY]] | The user who rejected/declined the workflow. |
| Workflow | [[REJECTED_DATE]] | When status is rejected, the last modified date of the step appears. |
| Workflow | [[RECIPIENT_USERNAME]] | The user name of the recipient |
| Workflow | [[REJECTED_BY]] | The user who rejected/declined the workflow. |
| Workflow | [[REJECTED_BY_COMMENT]] | Comments entered by the user who rejects the workflow request. |
| Workflow | [[REJECTED_DATE]] | If the status is rejected, the last modified date appears for the last step. |
| Workflow | [[SUBJECT_USER_ID]] | The user ID of the user for whom the change is suggested. However, for FO workflows, it would be empty. |
| Workflow | [[SUBJECT_USER_USERNAME]] | The user name of the user for whom the change is suggested. However, for FO workflows, it would be empty. |
| Workflow | [[SUBJECT_USER_COSTCENTER]] | Current cost center of the subject user. This tag is used to locate an employee in the organiza-tion structure. |
| Workflow | [[SUBJECT_USER_DEPARTMENT]] | Current department of the subject user to lo-cate an employee in that organization. |

| Tag Type | Tag Name | Description |
|---|---|---|
| Workflow | [[SUBJECT_USER_JOBCODE]] | Current job code of the subject user for that employee. |
| Workflow | [[SUBJECT_USER_JOBTITLE]] | Current job title of the subject user for that employee. |
| Workflow | [[SUBJECT_USER_LOCALJOBTITLE]] | The current local job title of the subject user. |
| Workflow | [[SUBJECT_USER_LEGAL_ENTITY]] | Current legal entity of the subject user. This tag is used to locate an employee in their organization. |
| Workflow | [[SUBJECT_USER_PREFERRED_NAME]] | The preferred name of the subject user. |
| Workflow | [[SUBJECT_USER_BUSINESS_UNIT]] | The business unit of the subject user. |
| Workflow | [[SUBJECT_USER_LOCATION]] | The location of the subject user. |
| Workflow | [[TIME_OFF_TYPE]] | Time off (employee time) type. |
| Workflow | [[TIME_OFF_STATUS]] | Status of time off workflows. |
| Workflow | [[VIEW_LINK]] | Link to the approval page. Please note the following:<br>• CC Role: The notifications they receive don't contain an approval page link.<br>• User-based workflows: directs you to the People Profile page of the subject user.<br>• Non-user MDF workflows: directs you to either the *Manage Data* page (for Department-related and similar workflows) or the *Manage Positions* page (for Position-related workflows).<br>• Foundation object (FO) workflows: directs you to the foundation object page.<br>The tag has a hardcoded value "Here". The value can be translated in code, but isn't user-configurable. So, when an email notification doesn't have a translated version and the default English version gets used instead, it may show a translated text of "Here" as the link text. |
| Generic | [[COMPANY_NAME]] | The company name as listed in Provisioning. |
| Generic | [[EMP_USER_ID]] | User ID of e-mail recipient. |

| Tag Type | Tag Name | Description |
|---|---|---|
| Generic | `[[SENDER]]` | The person who is performing an action, the change initiator, approver, and so on. |
| Generic | `[[SIGNATURE]]` | E-mail signature as entered within E-Mail Notification Templates<br><br>**i Note**<br><br>For the e-mail signature to be shown, it must be enabled in the system. Go to *Admin Center* > *Email Notification Templates*, then select the *Email Signature* option and add the desired text. |

> **! Restriction**
>
> Documentation generation e-mail limitations do not allow direct-access tags for the following:
>
> - HRIS Alert: New Hire
> - MDF Object or General Object (GO) workflows

> **→ Remember**
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

## 6.2 Creating Custom Templates with Document Generation

Document Generation enables you to create and manage custom documents, including workflow email templates that use both text and images. Being able to create and assign templates more flexibly, you can have custom notification text for different participant types.

### Prerequisites

You have enabled the Document Generation feature.

You have the following permissions:

- The *Configure Business Rules* permission
- The relevant *Manage Document Generation* permissions

ℹ Note

Only an overall procedure of managing your custom templates using Document Generation is described here. For detailed steps and options, please see the Employee Central Document Generation guide.

## Procedure

1. Create a Document Generation Group for a particular workflow notification purpose, for example, approval notifications for maternity leave.
2. Create a Document Generation Template and associate it with the group you have created.

   You can associate one or more templates to a group. For example, if you want a template available in multiple languages, you can associate multiple templates to the same template group. You'll later assign the group to a workflow email configuration and the system uses a template in the group to generate relevant email notifications.
3. **Conditional:** If you plan to distinguish notification email content sent to different workflow participants or sent for different workflow actions, create more templates and groups as needed.

   For example, you can create one template for the workflow initiator and another for workflow approvers when an approval step is completed. Moreover, for the same role, the workflow initiator, you can have templates for different workflow actions, for example, one for step approval and another for the final approval.

## Results

The Document Generation Group has been associated with the Document Generation Template. When you create a workflow email configuration, the Document Generation Group is available for selection as custom template.

## Next Steps

Assign the Document Generation Groups in a workflow email configuration.

**Task overview:** Defining Workflow Email Notifications [page 83]

## Related Information

Editing Standard Templates [page 84]
Creating a Workflow Email Configuration [page 94]
Setting Up Custom Workflow Notifications [page 95]

## 6.3 Creating a Workflow Email Configuration

A workflow email configuration is a set of email notification templates to be used at various workflow steps. You can build a workflow email configuration with all custom templates created with Document Generation or with a combination of both standard and custom templates.

### Prerequisites

You have created Document Generation Templates and have assigned them to relevant Document Generation Groups.

### Context

If you only want standard email notifications, you **don't** need to create a workflow email configuration. The workflow email configuration allows you to specify, at each workflow action level, whether email notifications are to be sent and if so, which template is used in creating notifications.

### Procedure

1. Go to *Admin Center* > *Manage Workflow Email Configuration* and create a new configuration.

   If you only want to modify an existing configuration, select it from the configuration dropdown list.
2. Turn email notifications on or off for the relevant recipients at each workflow action.

   For example, when a workflow step is approved, you want the initiator and contributor to be notified, but you don't think it's necessary to notify the current approver of this step. You can define the configuration for *Workflow approved Action* as follows:

   | Workflow Action | Email Recipient | Email Notification |
   |---|---|---|
   | Workflow approved | Initiator | ON |
   | | Current Approver | OFF |
   | | Contributor | ON |

3. Select the template you want to use for each workflow action and its recipients:
   - **Standard**
     The standard template in the *E-Mail Notification Templates* admin tool that is defined for this workflow action and recipient.
   - **<Document Generation Group>**

   Custom templates that you've created with Document Generation. The system uses the custom template assigned to the group to create email notifications.

4. Save the email configuration.

## Results

The workflow email configuration has been created.

## Next Steps

Assign the workflow email configuration to a workflow foundation object.

**Task overview:** Defining Workflow Email Notifications [page 83]

## Related Information

Editing Standard Templates [page 84]
Creating Custom Templates with Document Generation [page 92]
Setting Up Custom Workflow Notifications [page 95]

# 6.4 Setting Up Custom Workflow Notifications

Administrators can create custom email notification templates for each of the major workflow actions and for specific email recipients. Within these templates, administrators can go beyond existing workflow tags to define variables that provide more useful information to the workflow participants. Administrators also have the flexibility to turn off the notifications when necessary.

## Context

### Limitation

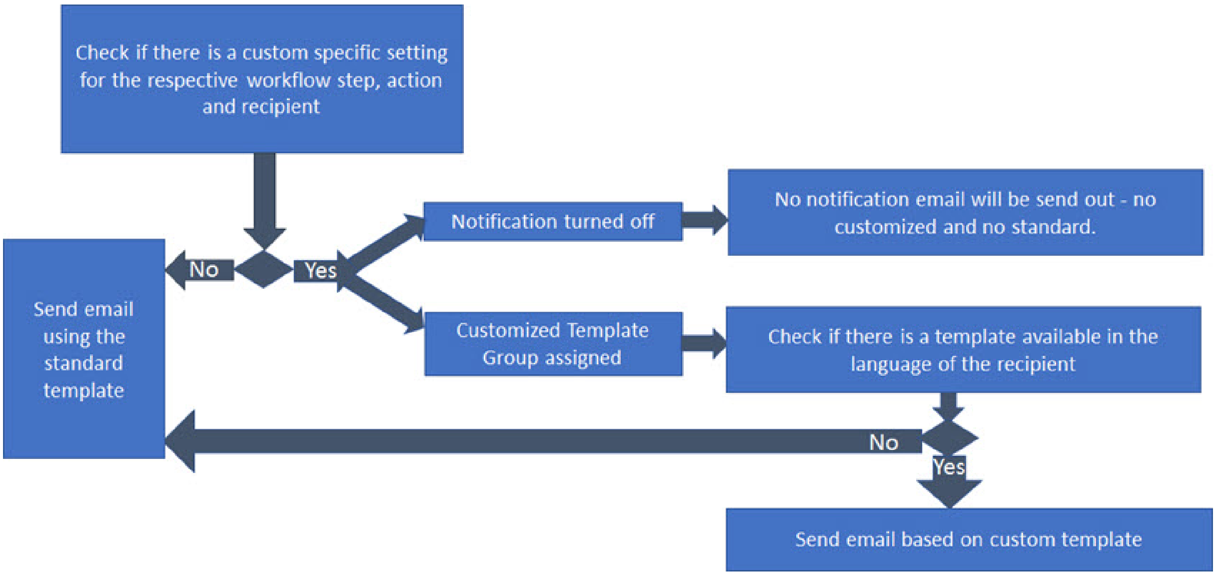
We do not support custom mails for delegation and escalation as well as emails generated when an HR admin locks, unlocks, reroutes, or skips workflows.

### How it works

If you want to have custom emails or even no emails sent out for specific workflows, workflow actions, or participants, then you can now overrule the standard behavior. If no customization is found, the standard template is used.

The system checks whether a custom workflow notification is assigned at the respective workflow step configuration and checks the setting in this object for the relevant workflow action and participant:

- If nothing is customized, then the standard template is sent out.
- If email notifications are turned off, then no email is sent out.
- If a template group is assigned and the system finds a template in the language of the email recipient, an email is sent out using this template.
- If no custom template is found in the language of the email recipient, the standard template is used.




## Templates and Variables

We use the document management functionality for defining email templates, mapping variables, and creating email texts. For more information about document generation, check the topic listed in *Related Information*.

### Workflow Tags

The system supports all existing known workflow tags and reuses them. For a list of supported workflow tags and their descriptions, see Available Workflow Tags for E-mail Notifications [page 87]. Within the mapping configuration, these fields must have the mapping type *Reference*. You can further select a tag from the *Reference* list.

### Generic Tags

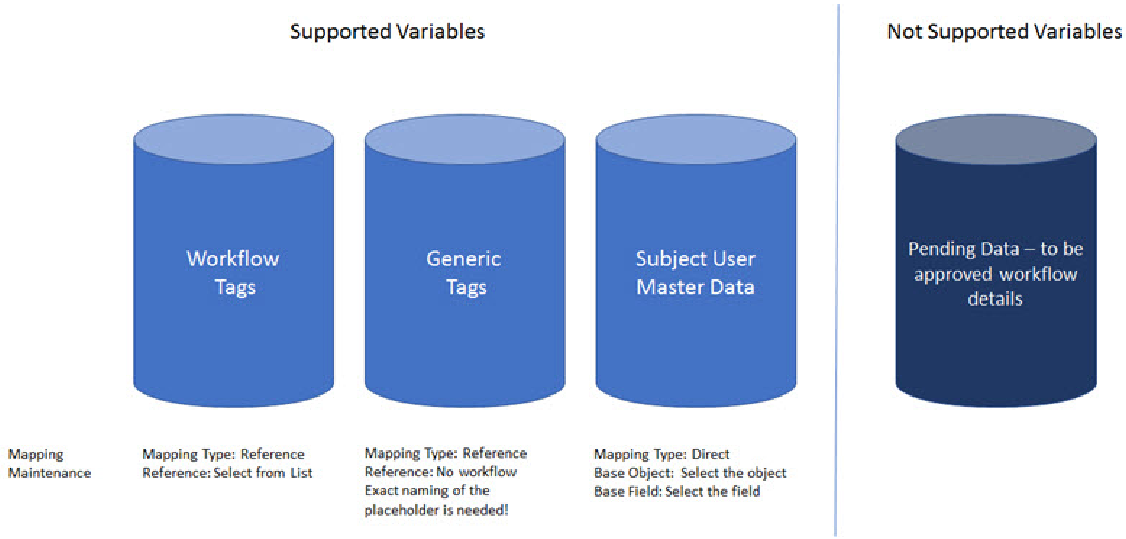
In addition we support generic tags such as signature. Make sure that these are correctly added (same spelling) in the template. They must have the mapping type *Reference* as well as the reference item *Non-workflow*.

For a list of supported generic tags and their descriptions, see Available Workflow Tags for E-mail Notifications [page 87].

### Master Data of the Subject User

For user-based workflows (HRIS and MDF), you can flexibly use all the master data of the subject user and map this into the email. Data from job information, employment information, compensation, personal information, work permit, and so on can be used. Therefore select the reference type *Direct*, and select the object and the respective field.

We suggest that you only use the mapping type Direct Mapping. Other types may not be well supported.




> ⚠ Caution
>
> Since the system doesn't check permissions when resolving the variables, be careful when deciding which fields to include. This is a very powerful and flexible tool for which you have full control and responsibility.

### Limitations

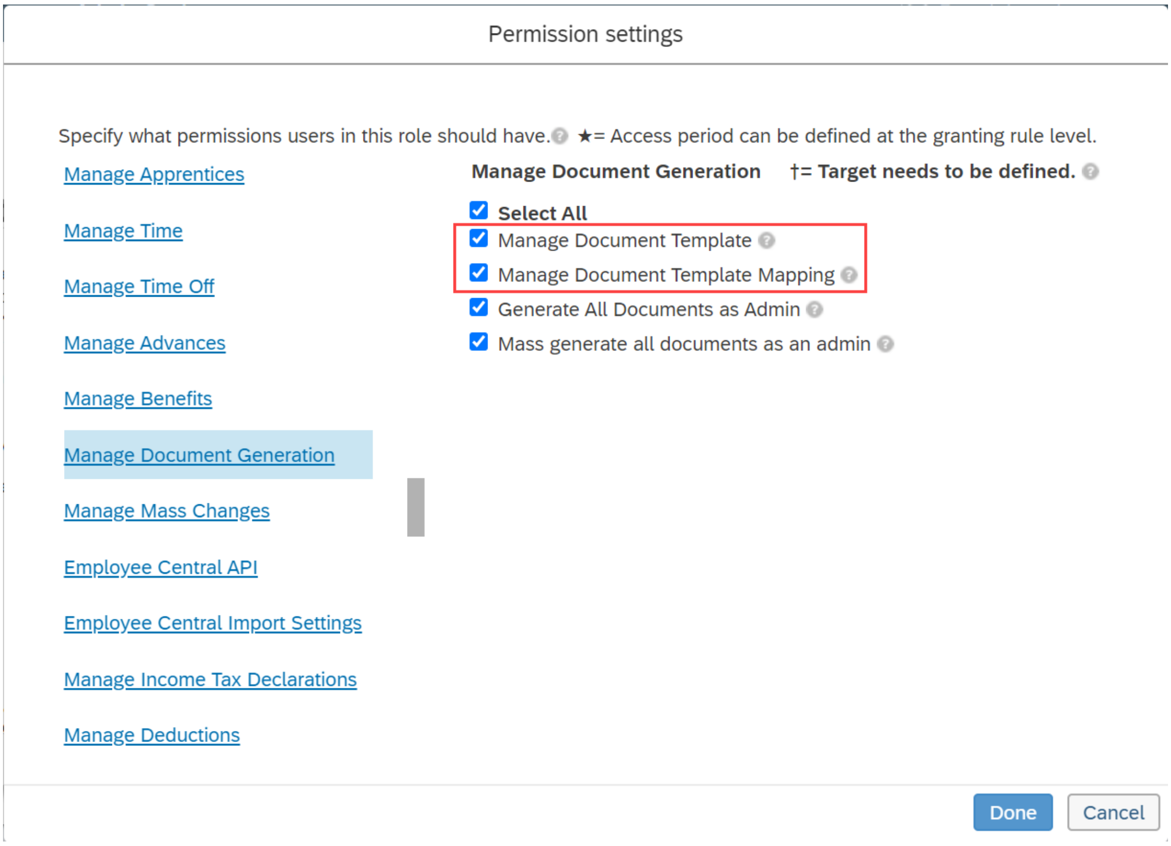
- Data that needs to be approved cannot be mapped into an email.
- Since there is not a subject user for foundation object workflows, only the workflow and generic tags are supported.
- For foundation objects, the system cannot derive the localized name.
- For new hires, since there is no saved master data, only workflow and generic tags can be used. For rehires, since there is saved master data, the mapping is possible.
- Since there is no subject user for object-based MDF workflows such as position workflows, only workflow and generic tags are supported.

### Prerequisites

- Document generation must be enabled in your system

### Permissions

- The admin must have permission to create workflow configurations.
- The admin must have permissions for document generation:
  - Manage Document Template
  - Manage Document Template Mapping




## Procedure Overview

This list gives you an overview of how to set up the custom workflow notifications. All the steps with more details are given in the *Procedure* section.

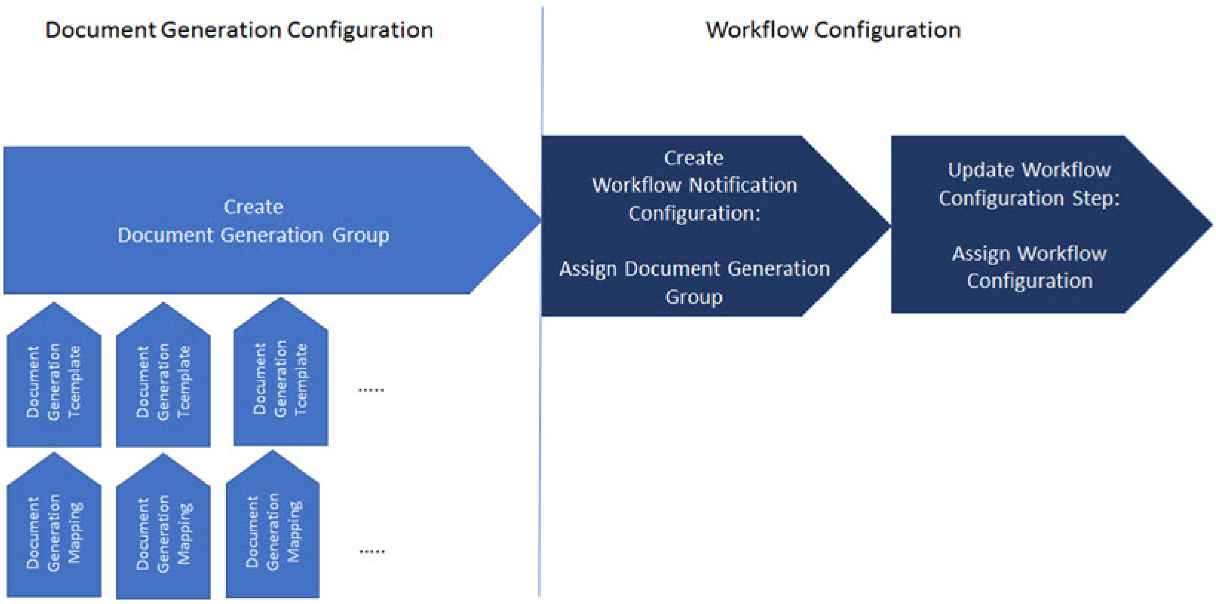
> **i Note**
>
> You can customize the workflow notifications at workflow step level.

1. Create a document generation group, which groups all templates you have in the various languages together.
   Even if you only need one language, you **must** create a document generation group.
2. Define an email template and assign the document generation group.
3. Define the mapping of the variables for the template.
4. (Optional) Copy the template if you need templates in several languages.
5. Create a workflow notification configuration in which you assign the document generation group for customized emails and/or switch off notifications.

   > **i Note**
   >
   > If you only want to switch off notifications, you can start with step 5.

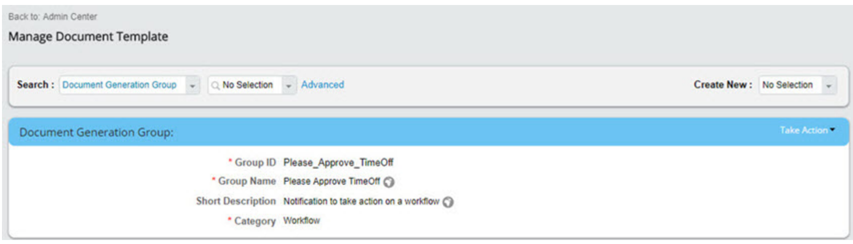
6. Assign the workflow notification configuration at the workflow configuration.

> **i Note**
>
> For CC notifications, you directly assign the document generation group – so you do not need to do step 6.




## Procedure

1. Create a document generation group. This object groups together all templates for one workflow action in various languages.
   a. In *Admin Center*, in the *Tools* search field, enter *Manage Document Template*.
   b. In the *Manage Document Template* screen, choose *Create* > *New Document Generation Group*.
   c. Enter the required information:
      - Group ID
      - Group Name
      - Category: Workflow
        You **must** select Workflow from the Category list.



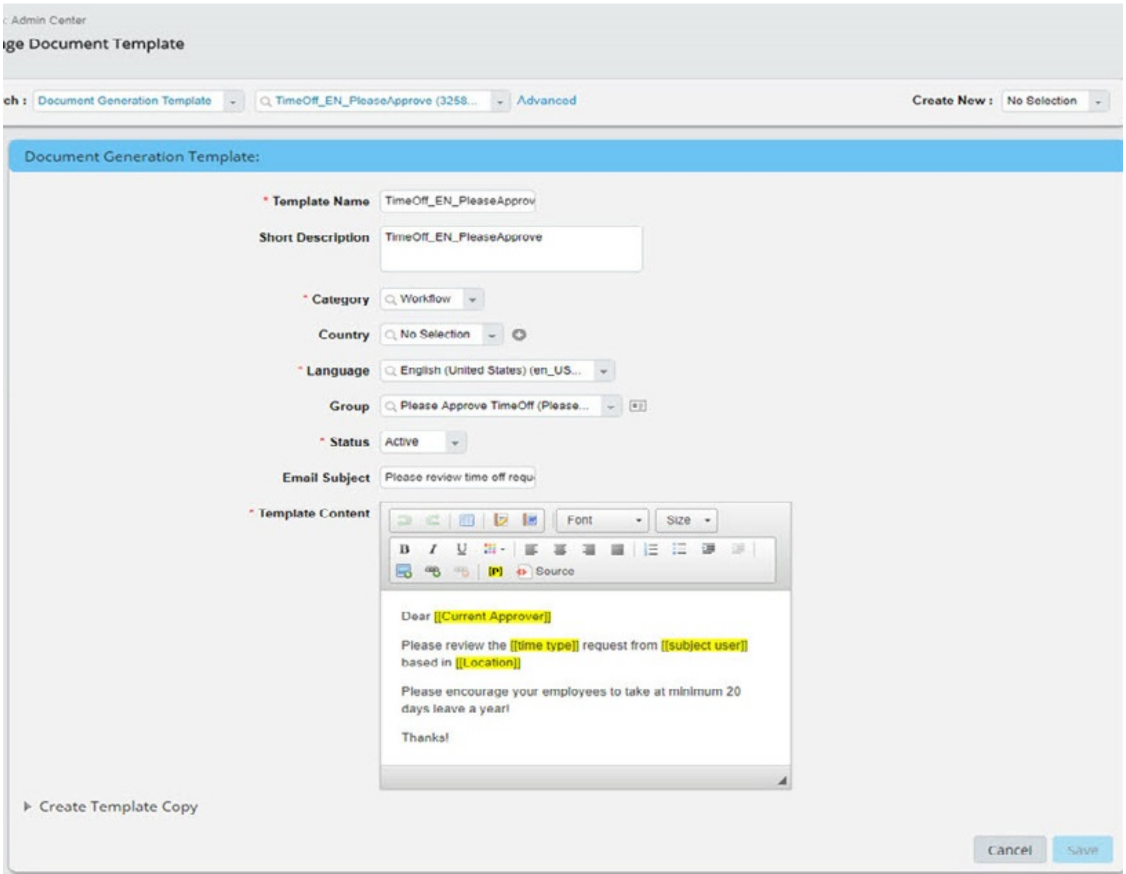

   a. Save your changes.
2. Create a document generation template.
   a. In the *Admin Center*, in the *Tools* search field, enter *Manage Document Template*.

b. In the *Manage Document Template* screen, choose ▶ *Create* ▶ *New Document Generation Template* ◀.

c. Enter the required information:

- Template Name: Enter a name
- Category: Workflow
  You **must** select Workflow from the Category list.
- Language: Select the language needed
- Group: Assign the group that created in the previous step.
- Status: Active
- Email Subject: Enter a subject line for the email. Note that you can use tags in double square brackets [[ ]] if required.
- Template Content: Add the content for the email. Note that tags should be added with the *[p]* function.

> ⚠ Caution
>
> Tables used in a document generation template are not rendered very well in email notifications sent out. Specifically, texts in some cells may not look vertically centered as they're meant to be. We suggest you avoid using tables to format your information when possible.




d. Save your changes.

3. Define the mapping for your tags.

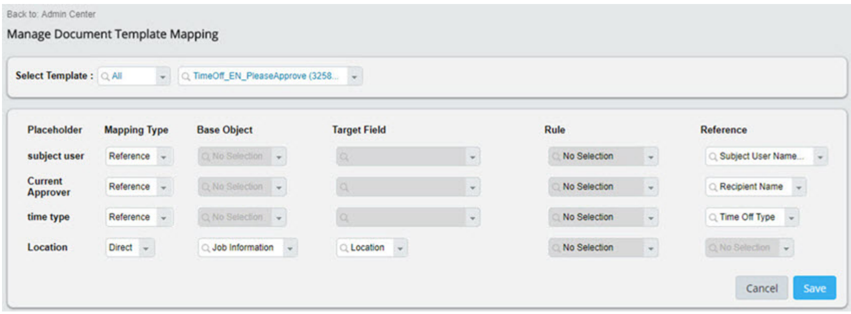
a. In the *Admin Center*, in the *Tools* search field, enter *Manage Document Template Mapping*.

b. In the *Manage Document Template Mapping* screen, search for the template you created in a previous step.

c. Set up the mapping.

   All the tags are listed there and you can define how their values are derived. For templates that have the category *Workflow*, there is the additional mapping type *Reference*.

   - For workflow tags, select *Reference* as the mapping type and then select the entry from the *Reference* list.
     For a list of supported tags and their descriptions, see Available Workflow Tags for E-mail Notifications [page 87].
   - For generic tags, select *Reference* as the mapping type and then select *Non-workflow* from the *Reference* list.
   - For master-data variables, select any other mapping type and then the respective base object and field.




   All the tags there are expected to be mapped properly. However, if you have left any tag unmapped, the system still sends notification emails based on the document generation template, but an unmapped tag will be shown as unresolved, for example, [[Current Approver]], instead of any specific approver. Previously, that would cause a fallback on a standard email template and generate an email based on it that contains an error message.

   > **i Note**
   >
   > Direct mapping placeholders cannot be resolved for new hire workflows, because new hires haven't been assigned subject user IDs yet.

d. Save your changes.

4. (Optional) Copy the template including the mapping.

   You have now created one template and the corresponding mapping for one language. If you need additional languages, you need to create individual templates for those languages. Ensure that these templates are assigned to your Document Generation Group.

   If the content and tags are the same for the different languages, you might want to reduce maintenance effort by copying the first template including the mapping.

   a. In the *Admin Center*, in the *Tools* search field, enter *Manage Document Template*.
   b. In the *Manage Document Template* screen, search for your template.
   c. At the bottom of the screen, open the *Create Template Copy* section.
   d. Enter the name and the language for the copy.
   e. Save your changes. The system also copies the mapping for the template for this language.

Then you have to edit the newly created template by manually replacing the texts for the new language and adding or removing tags. If you add tags to the template, make sure that you also update the mapping of this template to reflect those changes.

> **Note**
>
> If you have already copied templates and later add a tag to the original, this is not automatically passed to the copies.

Make sure that you have created a template and the mapping for all the required languages and have assigned them to the document generation group. If the system cannot find a template in the language (locale) of the recipient, the system will use the standard template. Please make sure that you have only one template for each language in a workflow document generation group.

For external email recipients (CC roles having External Email as role type), where we have no language information, we use the language of the last approver to define a template, but if the workflow has no approvers but only CC roles, then the default locale of the initiator will be used instead.

5. Create a workflow email configuration.
   a. In the *Admin Center*, in the *Tools* search field, enter *Manage Workflow Email Configuration*.

   > **Note**
   >
   > Do not create this configuration using *Manage Data*. The system does not support adding or deleting workflow participants.

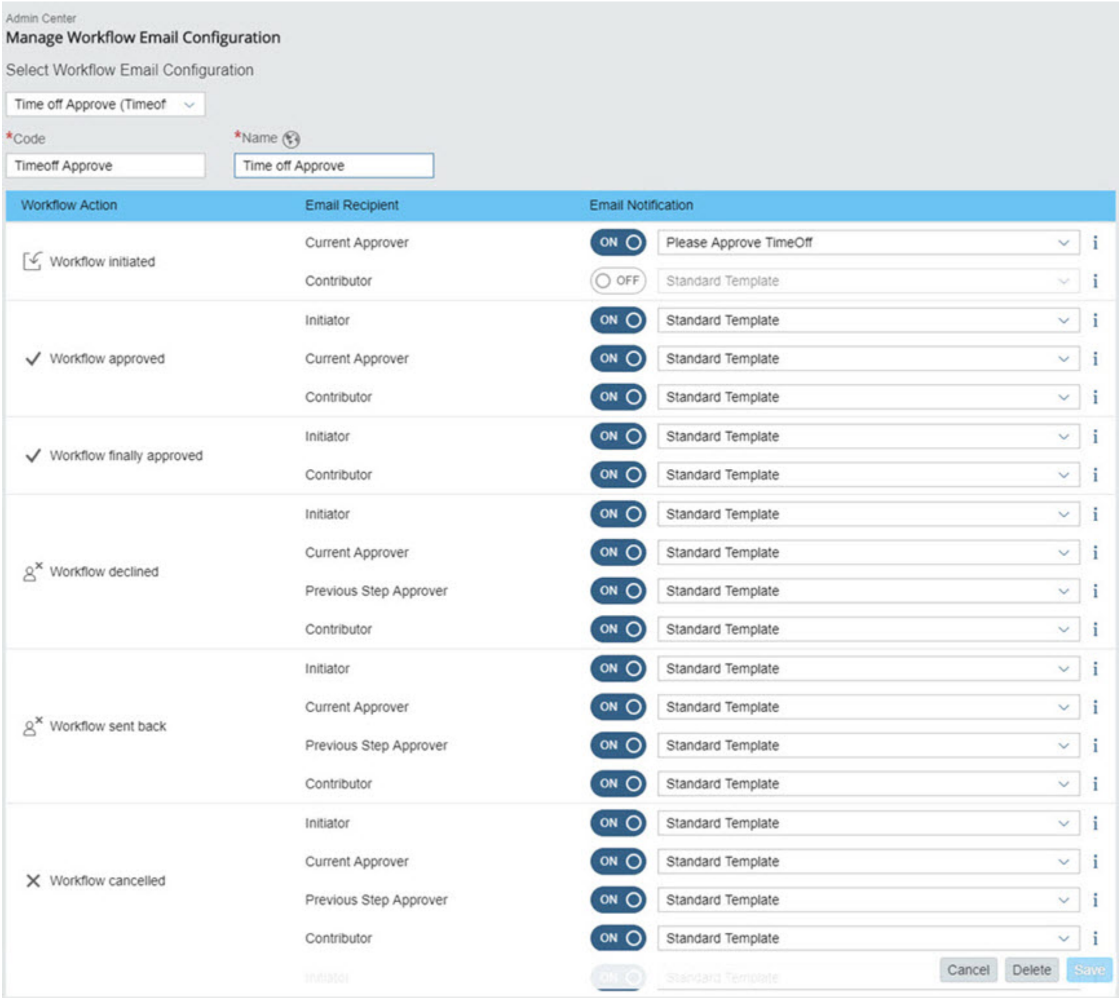
   b. In the *Manage Workflow Email Configuration* page, the system shows the maximum list of who gets informed for which workflow action. For each action, the standard workflow participants are shown. For the workflow actions and participants where you want to deviate from the standard procedure, you can assign a custom document template group or switch off the sending out of emails. At the end of each row, you can hover over the icon for more information, which includes the name of the standard template.

   If you have not defined a contributor role at the respective workflow, simply ignore it.

   The key actions for workflows that support custom workflow notifications are listed:

   > **Tip**
   >
   > Custom Document Generation templates are used only for actions listed on this page. Email notifications sent for other actions always adopt standard templates.

   - Workflow initiated: A data change has been made, a workflow is triggered and workflow participants of the first step are informed.
   - Workflow approved: A step approver has approved a workflow step.
   - Workflow finally approved: Workflow finally approved.
   - Workflow declined: Workflow declined by current approver or by HR admin.
   - Workflow sent back: Workflow sent back to be updated or withdrawn by the workflow initiator.
   - Workflow cancelled: Workflow cancelled by the workflow initiator.
   - Comment posted: Comment posted by any workflow participant.

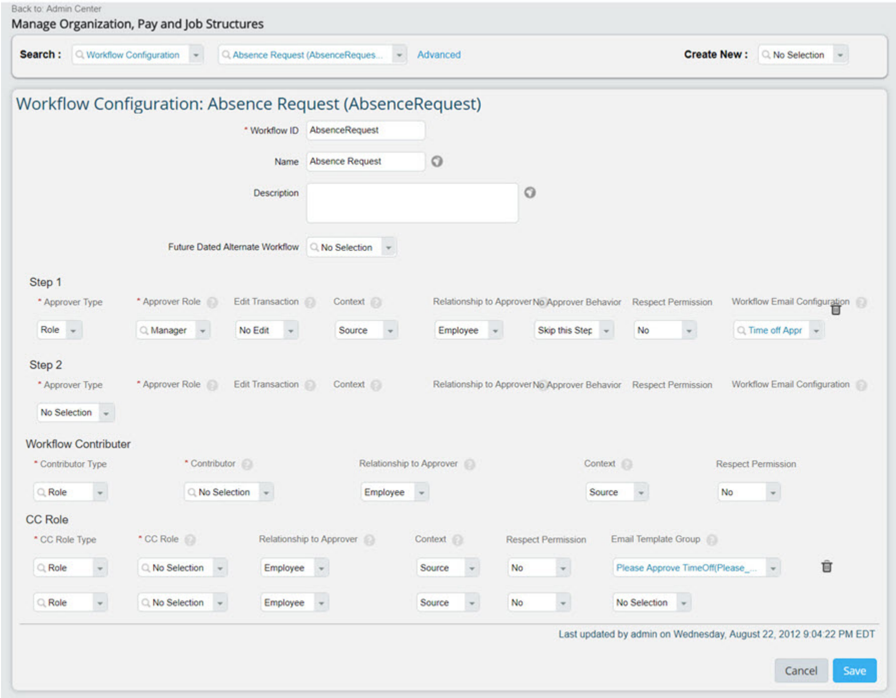



> **i Note**
>
> Make sure to enter a meaningful code for the configuration. It cannot be changed once the workflow email configuration is created in the system.
>
> The name of a configuration can be defined in various languages.

c. Save your changes.

6. Assign the workflow email configuration at the workflow configuration step level.
    a. In the *Admin Center*, in the *Tools* search field, enter *Manage Organization, Pay and Job Structures*.
    b. Search for the required workflow configuration.
    c. For each step where it's required, assign the *Workflow Email Configuration*.

> **i Note**
>
> For CC notifications, do not create Workflow Email Configurations. Instead, directly assign an Email Template Group.




d. Save your changes.

### Reminders

For reminder emails, the system uses the original custom mail with a prefix **Reminder**. In order to remind somebody to decide on a workflow, the system uses the template from Workflow Initiated > Current Approver. So you need to edit this field also for other approval steps (not only the first).

For workflows that are sent back and the workflow initiator needs to do something, we use the template from Workflow Sent Back.

If you want to send reminders, make sure that you do not switch these settings off.

### Automatic Skip Approval Step

In cases where the skip approval step is enabled and no approver can be found for the final workflow step, the system uses the final approval setting from the previous step. This means that you have to maintain this setting (Final Approval) also on the non-final steps.

### HR Admin Actions

In cases where an HR admin locks, unlocks, or re-routes workflows, the system can only send out emails based on the standard template rather than the customized template. The new workflow template notification is not supported for the actions done on the *Manage Workflow Requests* page with an exception where a workflow is declined.

For example, when an HR admin routes a workflow from step 2 to Step 3, Step 3 (current approver) will receive the standard template (workflow pending notification) although there is a customized template assigned. If the current approver approves the workflow, the custom workflow notification is used (if configured).

### Troubleshooting

If you receive a custom notification, but with a blank, that means that the system has not found a value for the defined field.

If you receive a standard email, instead of a custom email, that means that you should check your mapping configuration for the template in the respective recipient locale. The system adds a message with the template name at the beginning of the standard text to indicate that there is a customization problem with the mapping.

**Task overview:** Defining Workflow Email Notifications [page 83]

## Related Information

Editing Standard Templates [page 84]
Creating Custom Templates with Document Generation [page 92]
Creating a Workflow Email Configuration [page 94]
What Is Document Generation?

# 7 To-Do Alert Overview

With a well-defined alert mechanism, the system automatically sends alerts to employees reminding them of a coming system event that may require their attention.

For example, an alert can be sent to managers when their direct reports are soon to begin a long vacation. Or, an alert can be sent to HR admins when an employee's work permit is about to expire.

Depending on your configuration, employees can access the alerts from the *Take Action* to-do tile or receive the alert through an email notification.

There are three key elements in the alert mechanism you build:

- Alert messages
  Default messages are available, but you can also create your own message templates.
- Alert recipients
  Individuals that receive the alerts. You use workflow foundation objects to define alert recipients and how they are alerted.
- Alert triggering rules
  Alert rules, created as business rules, determine in which scenario an alert is to be triggered. Alert messages and recipient workflows are both assigned to the rules.

## Data Changes That Trigger Alerts

You can configure alerts for both Employee Central data and Metadata Framework (MDF) data.

| Data Types | Relevant Employee Records |
| --- | --- |
| Employee Central Data | • Compensation<br>• Employment Information<br>• Global Assignment<br>• Job Information<br>• Non-Recurring Pay Components<br>• Recurring Pay Components<br>• Work Permit<br><br>They correspond to the supported HRIS elements. |
| MDF Data | Person-Based<br><br>For example, payment information as related to an employee in the system. |

| Data Types | Relevant Employee Records |
| --- | --- |
| | Object-Based<br>For example, the work order object, which isn't associated with an employee or person in the system. |

## Related Information

Alert Recipients [page 112]
Defining Alert Triggering Rules [page 112]
Creating Custom Alert Messages [page 108]
Scheduling Recurring Job for Regular Alert Triggering [page 133]

# 7.1 Defining Alert Messages

## 7.1.1 Extending Maximum Length of Alert Messages

The default maximum length of alert messages is 255 characters. You can extend the length to 4000 to allow longer text as alert messages.

### Prerequisites

You have the *Configure Object Definitions* permission. You can find in under *Administrator Permissions* > *Metadata Framework* in the *Manage Permission Roles* admin tool.

### Procedure

1. Go to *Admin Center* > *Configure Object Definitions*.
2. Search for the Alert Message object and begin to edit it.
3. Change the maximum length to **4000** for the following fields:
   - `alertDescription`
     Message description field for the current sign-in locale
   - `alertDescriptionLocalized`
     Message description field for other locales

4. Save your changes.

## Results

The maximum length for alert messages has been extended. You can now define a message up to 4000 characters.

## Related Information

List of Role-Based Permissions

# 7.1.2 Creating Custom Alert Messages

You can use various text variable tags to create custom message templates.

## Prerequisites

The maximum length of message descriptions has been increased to 4000 characters.

You have the *Manage Data* permission. You can find it under *Administrator Permissions* > *Metadata Framework* in the *Manage Permission Roles* admin tool.

## Context

By assigning an alert message template to corresponding alert rules, you specify which template to use when alerts are created. Alerts in the Take Action to-do tile and alert email notifications are based on the same alert message template.

## Procedure

1. Go to *Admin Center* > *Manage Data*, and create a new alert message.

   To customize an existing alert message, you can search for the message and then choose *Make Correction* under *Take Action*.
2. Specify a name, external code, and effective status for the message.

The external code is the ID of the message. You'll need it when assigning the message to alert rules.

To make sure that the message takes effect immediately, save it as *Active*.

3. Define the alert header and description for the current sign-in locale.

   For Example:

   Alert Header: **`Benefit Enrollment Notification`**

   Alert Description: **`Dear [[SUBJECT_USER]] welcome onboard, please proceed to enroll your benefits within 1 week.`**

   In this example, `[[SUBJECT_USER]]` is a message text tag. It's a variable that represents the subject user of the alert. Other tags that you can use include the following:

| Subject Data Type | Available Tags |
| --- | --- |
| Employee Central Data | Subject user: `[[SUBJECT_USER]]` |
| | Event reason: `[[EVENT_REASON]]` |
| | Effective date: `[[EFFECTIVE_DATE]]`<br>The effective date is the date when the data changes come into effect. |
| MDF Person-Based Data | Subject user: `[[SUBJECT_USER]]` |
| | Object type (such as benefits claim, timesheet): `[[OBJECT_TYPE]]` |
| | Effective date: `[[EFFECTIVE_DATE]]`<br>The effective date is the date when the data changes come into effect. |
| MDF Object-Based Data | Object type (such as position): `[[OBJECT_TYPE]]` |
| | Object name: `[[OBJECT_NAME]]` |
| | Effective date: `[[EFFECTIVE_DATE]]`<br>The effective date is the date when the data changes come into effect. |
| Time off Alerts | Subject user: `[[SUBJECT_USER]]` |
| | Time off start date: `[[START_DATE]]` |
| | Time off end date: `[[END_DATE]]` |
| | Time off type (PTO or maternity leave): `[[TIME_OFF_TYPE]]` |

| Subject Data Type | Available Tags |
|---|---|
| | Time off status (pending, pending approval, or canceled): `[[TIME_OFF_STATUS]]` |

> **i Note**
>
> Always use double brackets **[[ ]]** for tags.

4. Enter the localized text for the alert header and description.

   When users are signed in to a locale for which you've defined a localized message, the alert will be created for them using that localized message.
5. Save the alert message.

## Results

The custom message is created.

## Next Steps

Assign the alert message to an alert triggering rule.

## Related Information

Creating Custom Alert Messages

# 7.1.3 Creating Deep Link to People Profile Block in Alert Message

When configuring your alert message, you can use a special tag to generate a deep link that directs users to a specific block page of People Profile.

## Context

The tag will be rendered as a deep link in email notifications sent out. Choosing the deep link opens a People Profile page that displays a relevant block of the respective subject user. Deep links are also available in alert messages that users see in the *Take Action* dialog of the legacy home page. Alerts are supported only for the following seven Employee Central entities:

| Entity Type | Block Type |
|---|---|
| Compensation Information | COMP_INFO_BLOCK |
| Employment Information | EMPLOYMENT_INFO_BLOCK |
| Global Assignment | ASSIGNMENT_INFO_BLOCK |
| Job Information | JOB_INFO_BLOCK |
| Non-Recurring Pay Components | NON_RECURRING_BLOCK |
| Recurring Pay Components | COMP_INFO_BLOCK |
| Work Permit | WORK_ELIGIBILITY_BLOCK |

## Procedure

1. Go to *Admin Center* > *Manage Data*.
2. Create a new alert message or search for an existing one to modify.
3. In the *Localized Description* field, add the tag `[[VIEW_BLOCK_ON_PROFILE]]`.

   In alert email notifications that users receive, the link text is shown as "here".

   > → Tip
   >
   > Note that using the tag in the header isn't supported.

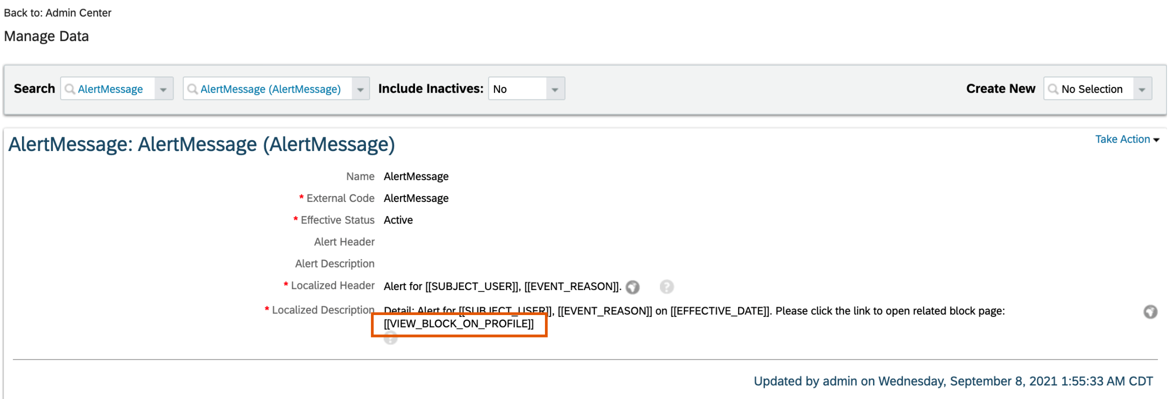



Figure 2: Inserting the Tag for Deep Link

4. **Optional:** Add the tag in any translation fields for the description if necessary.
5. Specify other fields and save your changes.

## Results

The custom alert message is created. Next, you need to assign the alert message and a workflow to a business rule to trigger the alert.

# 7.2 Alert Recipients

Alert recipients are defined through workflow foundation objects. Workflow approvers are those who receives the alert in the *Take Action* to-do tile and CC roles only receive the alert through email notifications.

Only use workflow approvers and CC roles for the purposes of defining alert recipients. Workflow contributors do not receive any alerts.

| Common Scenario | How Alert is Sent |
|---|---|
| Only CC roles assigned to workflow | Email notifications only |
| Only workflow step approvers assigned to workflow | To-do items are created as alerts. |
| Both CC roles and workflow step approvers assigned to workflow | E-mail notifications are sent out to CC roles and To-Do items are created as alerts for workflow step approvers |

## Related Information

Creating an Individual Workflow [page 24]

# 7.3 Defining Alert Triggering Rules

Use MDF business rules to define when an alert is triggered, which alert message template is used, and whom the alerts are sent to.

## Overall Process

1. Create a business rule.
2. Specify an alert message and recipient workflow object in the THEN statement.
3. Assign the rule to a relevant data object (Employee Central or MDF objects) as `SaveAlert` or `postSaveRule`.

When you want to modify an existent alert rule, we recommend that you use *Insert New Record*, instead of *Take Action* > *Make Correction*. This provides better traceability of rule change history and therefore makes it easier for our support staff to investigate alert related issues.

For the general information about how to create business rules and assign business rules to objects, see the following:

- Creating a Business Rule
- Base Objects in a Business Rule
- Assigning a Business Rule to an Employee Central Object
- Assigning a Business Rule to an MDF Object

> **i Note**
>
> We recommend testing your alert rules extensively in a test system with a limited number of employees before using them in your production instance. Ensure that you test the rules for all business transactions: create, change, and delete. When you test for all business conditions, make sure that you adjust the rules to eliminate unwanted alerts. When email alerts are sent, they cannot be centrally deleted.

For specific settings required in alert triggering rules, see the following:

Base Objects Used in Alert Triggering Rules for Employee Central Data Objects [page 114]
Learn how to define base objects in the alert triggering rule for the common Employee Central data objects.

Creating an Alert Triggering Rule for Employee Central Objects [page 115]
By creating an alert triggering rule, administrators can stay informed about changes to an Employee Central object.

Creating Alert Rules for MDF Data Objects [page 117]
You need to apply a few specific settings specific to alert rules for MDF objects.

Creating Alert Rules for Time Off [page 119]
Learn the specific settings that are to be used in alert rules for Time Off objects.

Examples of IF Conditions for Alert Rules [page 121]
This topic offers examples of different IF conditions for your alert rules that may specify location, data changes for specific fields, the last modified date, or by combining everything as one IF condition.

Avoiding Alert Created for Historical Records for an Employee [page 123]
You can define the IF conditions to prevent alerts from being created for all historical records for an employee.

Avoiding Alert Created for Inactive Employees [page 124]
You can define the IF conditions to prevent alerts from being created for inactive employees, for example, employees on a global assignment.

Alert Message Assignment to Alert Rules [page 125]
Learn the expected system behaviors when the same message is assigned to multiple rules.

## 7.3.1 Base Objects Used in Alert Triggering Rules for Employee Central Data Objects

Learn how to define base objects in the alert triggering rule for the common Employee Central data objects.

| Base Object | More Information |
|---|---|
| Employee Information or Employment Details | Base objects that have access to job information, job relationship, compensation, and other entities. |
| Job Information | Base object that has access to all fields in job information, plus the fields under *Employment Detail*. |
| Employee Information Model | The difference between Employee Information and Employee Information Model is that Employee Information Model allows you to do the following:<br>• Use current and previous value for comparison<br>• Use *isVisible* and *isRequired* properties |

We recommend using the same base object that matches the HRIS element you want to set the alert rule for. See the following table for more information about how HRIS elements match base objects you want to use for your alerts:

| Base Object | HRIS Element |
|---|---|
| Compensation Information | compInfo |
| Employee Information | employmentInfo |
| Global Assignment Details | jobInfo or employmentInfo |
| Job Information | jobInfo |
| Non-Recurring Payment | payComponentNonRecurring |
| Recurring Payment | payComponentRecurring |
| Work Permit Info | workPermitInfo |

> **i Note**
>
> When you use Employee Information as a base object, you can access all entities through Employee Information. You can define a saveAlert under jobInfo in the *Manage Business Configuration* tool and continue to use Employee Information as your base object. When you create the rule, specify fields from Job Information fields for your conditions.

**Parent topic:** Defining Alert Triggering Rules [page 112]

## Related Information

Creating an Alert Triggering Rule for Employee Central Objects [page 115]
Creating Alert Rules for MDF Data Objects [page 117]
Creating Alert Rules for Time Off [page 119]
Examples of IF Conditions for Alert Rules [page 121]
Avoiding Alert Created for Historical Records for an Employee [page 123]
Avoiding Alert Created for Inactive Employees [page 124]
Alert Message Assignment to Alert Rules [page 125]

# 7.3.2 Creating an Alert Triggering Rule for Employee Central Objects

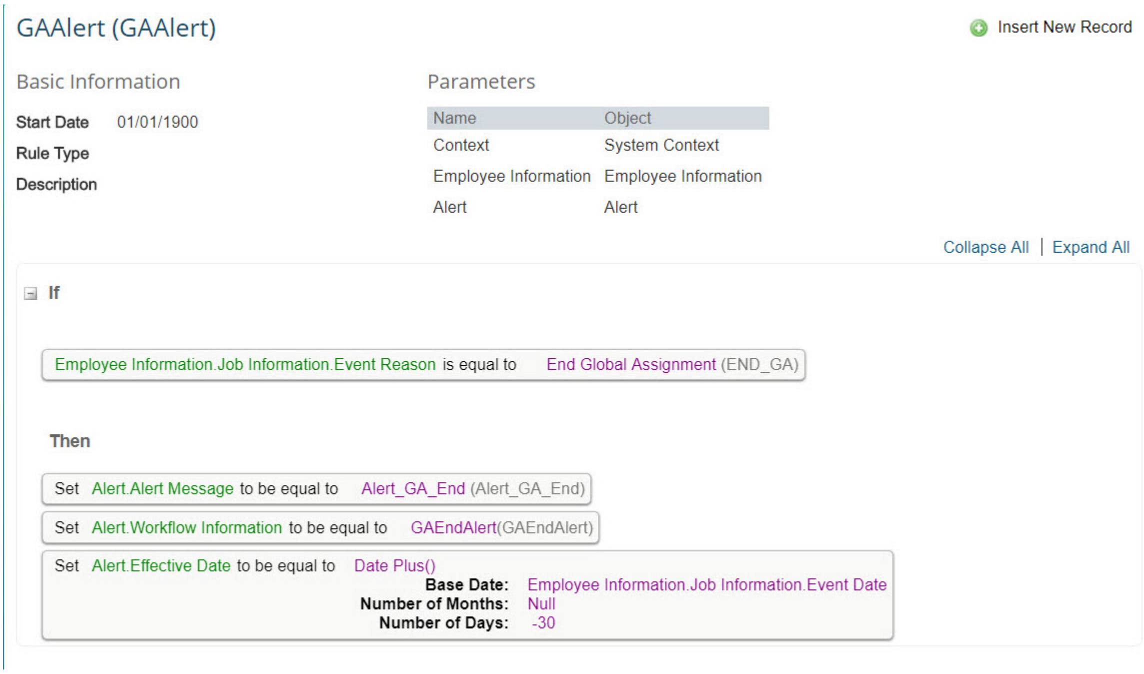
By creating an alert triggering rule, administrators can stay informed about changes to an Employee Central object.

## Procedure

1. In *Admin Center*, go to *Configure Business Rules* > *Employee Central Core* > *Generate Alerts* to start creating a rule.
2. Provide required information about the rule, particularly a proper base object. Also, you might want to add a description that explains why this rule is created.
3. Define the IF conditions as the triggering conditions.
4. Define the THEN statement with the following information:

| *Then* **Conditions** | **Information about Conditions** |
|---|---|
| `Alert.Workflow Information` | Assign the specific alert recipient workflow to your alert rule. |
| `Alert.Effective Date` | Define when the created alerts are sent. |
| `Alert.Alert Message` | Assign the custom alert and notification message to this alert rule.<br>This is an optional entry for the alert rule. When there is no defined alert, the system uses the default template. |

For Example




5. Save the rule.

## Next Steps

The rule has been created. You can now assign the rule to an object. See Assigning a Business Rule to an Employee Central Object.

> ⚠ Caution
>
> When assigning an alert triggering rule to an Employee Central object, be sure to select `saveAlert` as the event type; other event types may cause unexpected exceptions at this moment.

**Task overview:** Defining Alert Triggering Rules [page 112]

## Related Information

Base Objects Used in Alert Triggering Rules for Employee Central Data Objects [page 114]
Creating Alert Rules for MDF Data Objects [page 117]
Creating Alert Rules for Time Off [page 119]
Examples of IF Conditions for Alert Rules [page 121]
Avoiding Alert Created for Historical Records for an Employee [page 123]
Avoiding Alert Created for Inactive Employees [page 124]
Alert Message Assignment to Alert Rules [page 125]

## 7.3.3 Creating Alert Rules for MDF Data Objects

You need to apply a few specific settings specific to alert rules for MDF objects.

### Prerequisites

To make sure that the to-do alerts for an MDF object appear in a particular to-do alert section, select a to-do category for this object in the *Define Object Definition* admin tool. For example, for the Employee Time object, select the *Time Off Requests* category.

### Procedure

1. Create a rule.

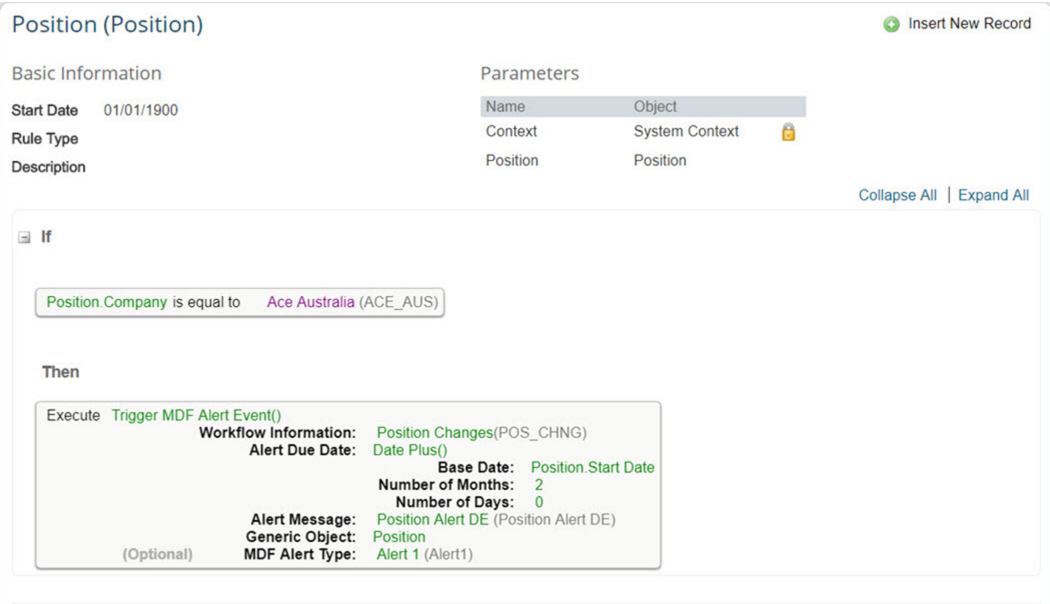
   When you select the rule type, choose *Rules for MDF Based Objects* under *Metadata Framework*. Also select the relevant MDF base object.
2. Instead of adding a parameter, use the default parameter that corresponds to the base object that you've selected.
3. Define the IF conditions that determine when the alert is triggered.

   > **i Note**
   >
   > To prevent alerts from being created for every record change in the database, do not use the Always True feature and avoid creating alert rules without any IF condition.
4. For the THEN statement, select *Execute* and *Trigger MDF Alert Event()*, and then define the following information:

| Field | Description |
| --- | --- |
| *Workflow Information* | Select *Workflow Context* to assign your workflow configuration for alert recipients.<br>**i Note**<br>If the *Workflow Context* field isn't shown, that means the *Rules for MDF Based Objects* option was not selected, and that you are instead creating a basic rule. |
| *Alert Due Date* | Also known as the effective date. It is the date when the alerts are actually sent. |
| *Alert Message* | Select the alert message template for this alert rule. |

| Field | Description |
| --- | --- |
| *Generic Object* | Select the base object, the subject MDF generic object. |
| *MDF Alert Type* | Select the alert type for your MDF object. Make sure that each alert rule of MDF objects has a unique alert type. |

For Example:




5. Save the rule.

**Task overview:** Defining Alert Triggering Rules [page 112]

## Related Information

Base Objects Used in Alert Triggering Rules for Employee Central Data Objects [page 114]
Creating an Alert Triggering Rule for Employee Central Objects [page 115]
Creating Alert Rules for Time Off [page 119]
Examples of IF Conditions for Alert Rules [page 121]
Avoiding Alert Created for Historical Records for an Employee [page 123]
Avoiding Alert Created for Inactive Employees [page 124]
Alert Message Assignment to Alert Rules [page 125]

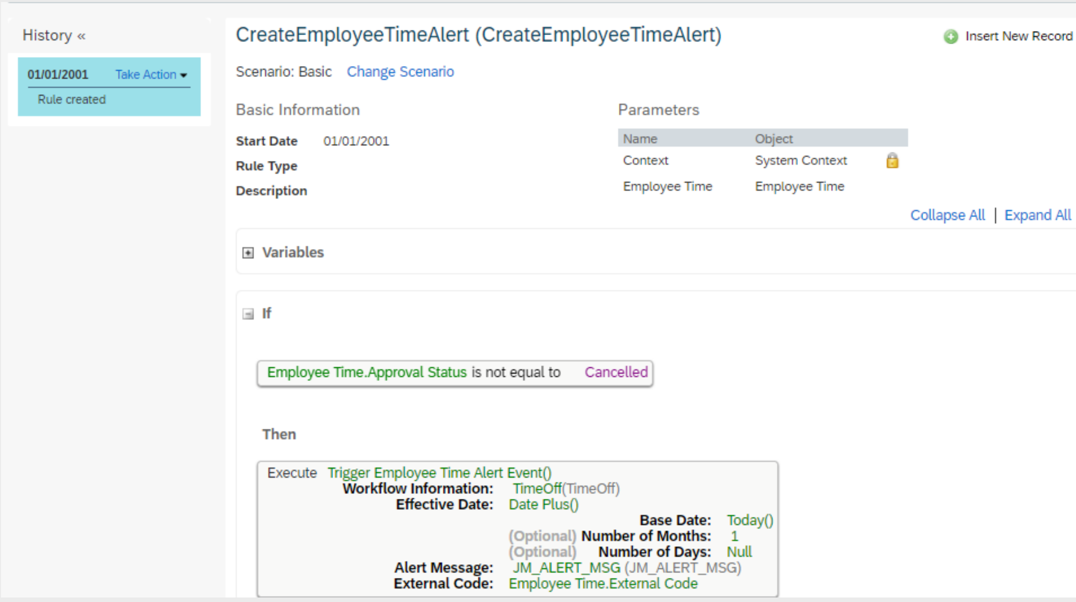
## 7.3.4 Creating Alert Rules for Time Off

Learn the specific settings that are to be used in alert rules for Time Off objects.

### Procedure

1. Create a basic rule and select the **Employee Time** as the base object.
2. You do not need to add any parameters. You can use the default parameter.
3. Define the IF conditions for the triggering conditions.

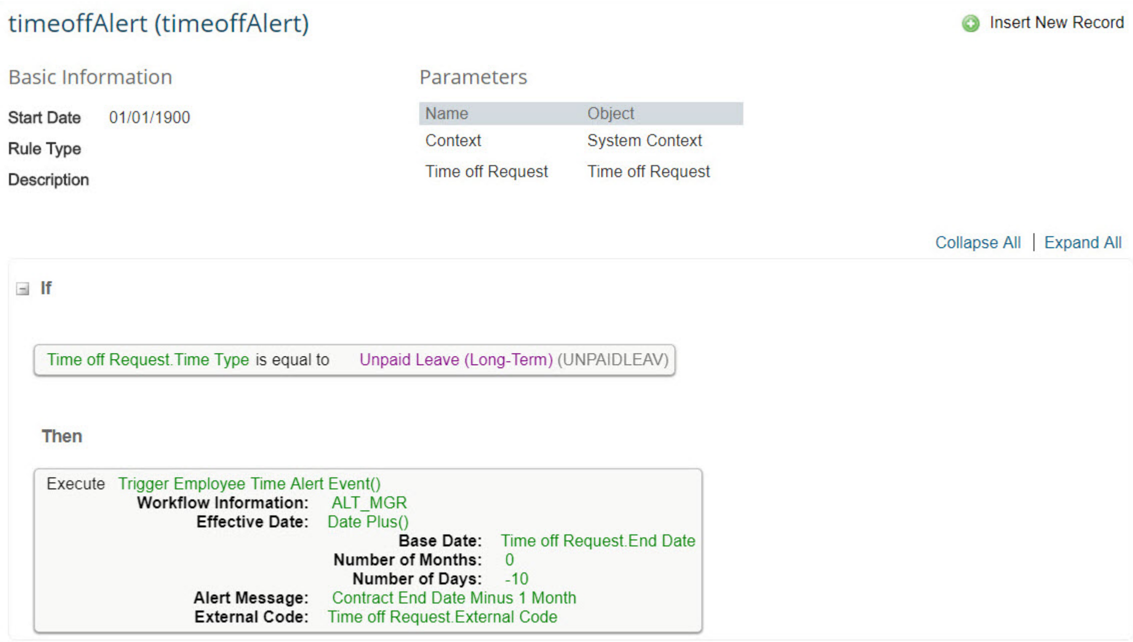
> **i Note**
>
> - To prevent alerts from being created for every record change in the database, do not use the Always True feature and avoid creating alert rules without any IF condition.
> - If you do not want to send future-dated alerts for cancelled absences, add an IF condition with Approval Status other than "Cancelled", as in this example:




4. For the THEN statement, select *Execute* and *Trigger Employee Time Alert Event()*. Then, define the following information:

| Field | Description |
| --- | --- |
| *Workflow Information* | Assign the workflow for alert recipients. |
| *Effective Date* | Define when the created alerts are sent. |
| *Alert Message* | Assign an alert message template. If you no template is assigned, the system uses the default message to create the alert. |
| *External Code* | Select the external code for Employee Time. |

For Example: Create a rule to send an alert to a manager 10 days before an employee's unpaid leave is over.




5. Save the rule.

**Task overview:** Defining Alert Triggering Rules [page 112]

## Related Information

Base Objects Used in Alert Triggering Rules for Employee Central Data Objects [page 114]
Creating an Alert Triggering Rule for Employee Central Objects [page 115]
Creating Alert Rules for MDF Data Objects [page 117]
Examples of IF Conditions for Alert Rules [page 121]
Avoiding Alert Created for Historical Records for an Employee [page 123]
Avoiding Alert Created for Inactive Employees [page 124]
Alert Message Assignment to Alert Rules [page 125]

# 7.3.5 Examples of IF Conditions for Alert Rules

This topic offers examples of different IF conditions for your alert rules that may specify location, data changes for specific fields, the last modified date, or by combining everything as one IF condition.

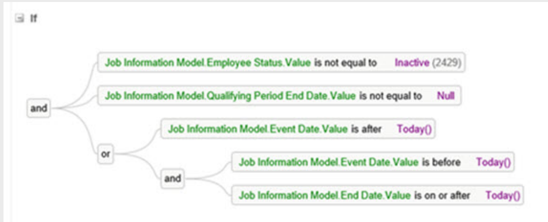
Table 6: Example IF Conditions

<table>
<tr><th>Scenario</th><th>More Information</th></tr>
<tr><td>Specific Criteria</td><td>If you want the alerts set up for employees in Germany.<br>

</td></tr>
<tr><td>Data Changes For Specific Fields</td><td>You can set up the system to look for data changes by comparing previous values. For objects, when an employee may have multiple records with the same field value, you can avoid triggering multiple alerts. For instance, every jobinfo records has a <code><Location></code> field.<br>
Example<br>
Check for records when the <code><Location></code> field is changed for Amsterdam.<br>

</td></tr>
<tr><td>Last Modified Date</td><td>When an employee has multiple historic records, all the job records involved as part of the rule evaluation is absed on the last modified date. You can use the start data (event date) and the end date to control only the current and future records into your alert.<br>
Example<br>

</td></tr>
</table>

| Scenario | More Information |
| --- | --- |
| Combination of Different *IF* Conditions | You can combine all these scenarios into one *IF* condition.<br>**Example**<br><br> |

**Parent topic:** Defining Alert Triggering Rules [page 112]

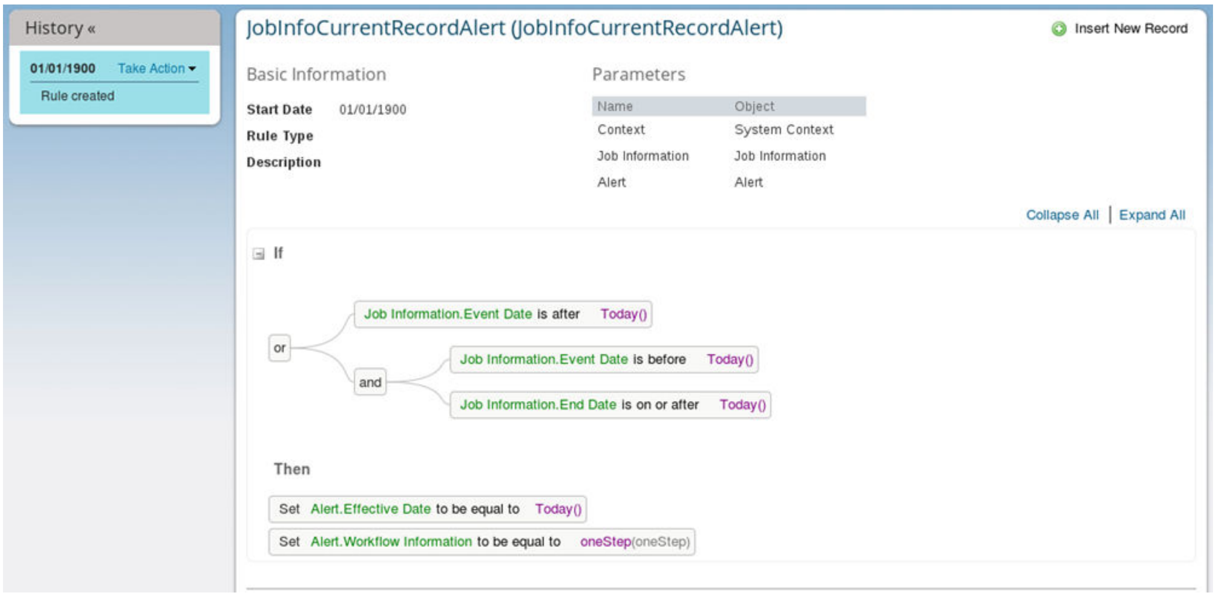
## Related Information

Base Objects Used in Alert Triggering Rules for Employee Central Data Objects [page 114]
Creating an Alert Triggering Rule for Employee Central Objects [page 115]
Creating Alert Rules for MDF Data Objects [page 117]
Creating Alert Rules for Time Off [page 119]
Avoiding Alert Created for Historical Records for an Employee [page 123]
Avoiding Alert Created for Inactive Employees [page 124]
Alert Message Assignment to Alert Rules [page 125]

## 7.3.6 Avoiding Alert Created for Historical Records for an Employee

You can define the IF conditions to prevent alerts from being created for all historical records for an employee.

When the employee has multiple historical records, all the job records are included during rule evaluation based on their last modified dates. You can use the start data (event date) and the end date to include only the current and future records into your alert. See the following example:




Also, you can use the previous value comparison to narrow down the record. For example: "jobinfo.job code.previous value is not equal jobinfo.job code.value".

**Parent topic:** Defining Alert Triggering Rules [page 112]

## Related Information

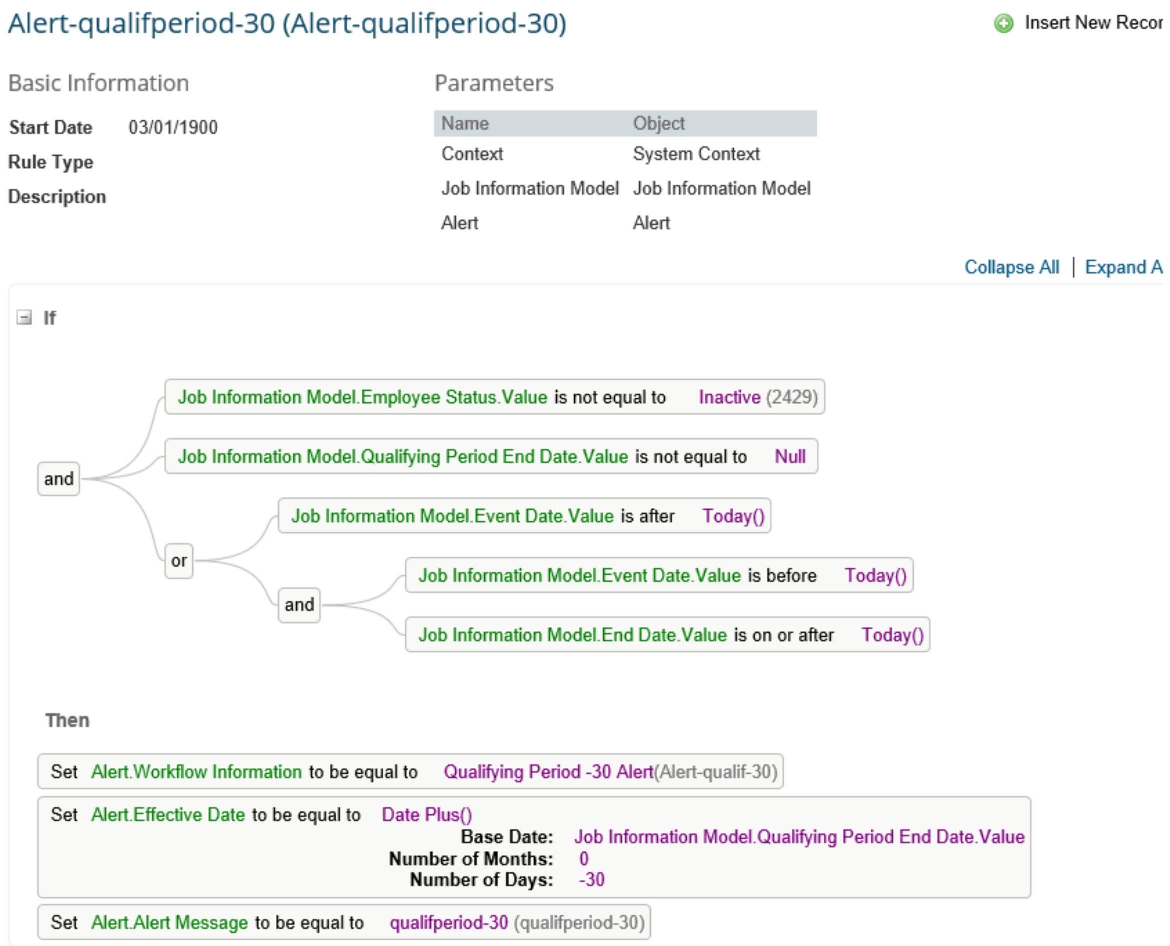
Base Objects Used in Alert Triggering Rules for Employee Central Data Objects [page 114]
Creating an Alert Triggering Rule for Employee Central Objects [page 115]
Creating Alert Rules for MDF Data Objects [page 117]
Creating Alert Rules for Time Off [page 119]
Examples of IF Conditions for Alert Rules [page 121]
Avoiding Alert Created for Inactive Employees [page 124]
Alert Message Assignment to Alert Rules [page 125]

## 7.3.7 Avoiding Alert Created for Inactive Employees

You can define the IF conditions to prevent alerts from being created for inactive employees, for example, employees on a global assignment.

You can use employee Job Information to get employee status and as for the event reason to detect whether an employee is inactive. Also, only check the "current " and "future" record.

For example, you want to send an alert 30 days before the qualifying period end date for active employees only.




> **i Note**
>
> For terminated employees, even if you don't exclude them with the above IF conditions, the alerts are created, but they won't be sent to the terminated accounts.

**Parent topic:** Defining Alert Triggering Rules [page 112]

### Related Information

Base Objects Used in Alert Triggering Rules for Employee Central Data Objects [page 114]

Creating an Alert Triggering Rule for Employee Central Objects [page 115]
Creating Alert Rules for MDF Data Objects [page 117]
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Examples of IF Conditions for Alert Rules [page 121]
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Alert Message Assignment to Alert Rules [page 125]

## 7.3.8 Alert Message Assignment to Alert Rules

Learn the expected system behaviors when the same message is assigned to multiple rules.

### Same Alert Message for 2 Different Rules

When the job information record change matches multiple rules, and the rules use the same message object, only **one** to-do alert or email notification is created.

Table 7: Example 1: Two rules triggered on same date

| Job Information Record Change | Rule | Alert Effective Date | Alert Message | Alert |
|---|---|---|---|---|
| Job change 1 | Rule 1 | January 01 | Message 1 | Alert XY |
| Job change 1 | Rule 2 | January 01 | Message 1 | Alert XY |

As a result, only one to-do item is created and one email notification is sent, as the message is the same.

### Same Alert Message for 2 Different Rules on 2 Different Dates

Table 8: Example 2: Two rules triggered on different dates

| Job Information Record Change | Rule | Alert Effective Date | Alert Message | Alert |
|---|---|---|---|---|
| Job change 1 | Rule 1 | January 01 | Message 1 | Alert AB |
| Job change 1 | Rule 2 | January 15 | Message 1 | Alert CD |

As a result, when the first rule is triggered, one to-do item is created and one email notification is sent for Alert AB. When the second rule is triggered, the first to-do item is deleted, as the message is the same. A new to-do item is created and an email notification is sent for Alert CD.

The system only updates the alert before the to-do item is created. Once the to-do item is created, no new to-do item is created for the same alert message.

**Parent topic:** Defining Alert Triggering Rules [page 112]

### Related Information

Base Objects Used in Alert Triggering Rules for Employee Central Data Objects [page 114]
Creating an Alert Triggering Rule for Employee Central Objects [page 115]
Creating Alert Rules for MDF Data Objects [page 117]
Creating Alert Rules for Time Off [page 119]
Examples of IF Conditions for Alert Rules [page 121]
Avoiding Alert Created for Historical Records for an Employee [page 123]
Avoiding Alert Created for Inactive Employees [page 124]

# 7.4 Alert Examples

## 7.4.1 Time Off Alert

You can set up alerts for different Time Off scenarios, such extended leave or unpaid leave.

### How to Set Up an Alert for Employee Return after Unpaid Leave

When an employee books extended time off or unpaid leave, you can have a rule set up to notify the manager 10 days prior to the return of an employee.

You can configure your *If* condition so that the system checks:

- Type of time off

You can configure your *Then* conditions so that the system checks:

- Alert message
- Alert Effective date using *Date Plus* function
- Alert Workflow Information
- External Code

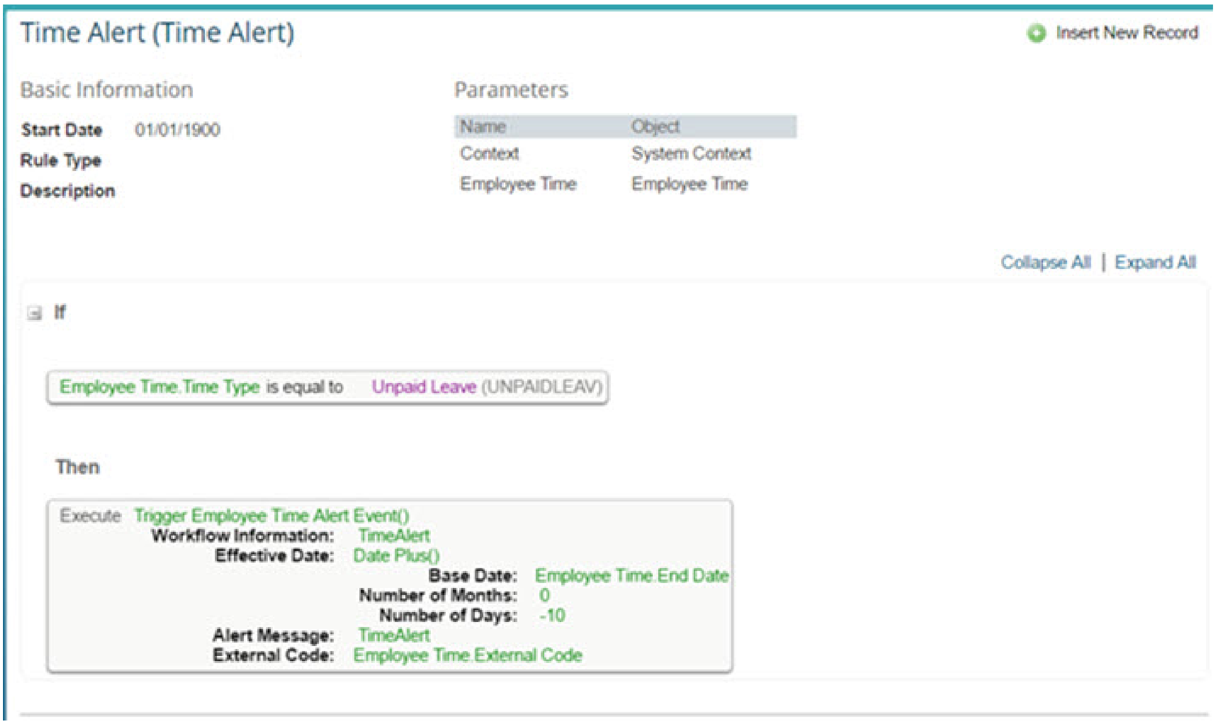



Figure 3: This Screenshot Includes If and Then conditions of Returning Employee After Unpaid Leave Alert Rule

## Example

Susan goes on maternity leave and requests on Sep 1, 2017 the following leave:

Leave September 2, 2017 – November 15, 2017.

So Susan's manager will receive an alert on November 5th (effective date of the alert) about her return. Technically the alert is generated on September 1st with an effective date of November 5th.

## Alternative Scenario - Leave Extension

Susan changes her leave request on November 1st to extend her leave:

Leave September 2, 2017 – November 30, 2017

The alert will be triggered on Nov 20th. The system deletes the previous alert and creates a new for the new effective date of November 20th.

### Alternative Scenario - Leave Reduction

Susan changes her leave request on November 1st to shorten her leave:

Leave September 2, 2017 – October 30, 2017

The alert will be triggered on November 1st. The system deletes the previous alert, creates a new alert with an effective date of October 20th, and sends it immediately.

### Alternative Scenario - Leave Reduction

Susan changes her leave request on November 1st and shortens her leave:

Leave September 2, 2017 – November 5, 2017

The alert will be triggered on November 1st. The system deletes the previous alert, creates a new alert with an effective date of October 25th, and sends it immediately.

## 7.4.2 Work Permit Alert

You can set up alerts to trigger before the expiration date of a work permit.

### How to Set Up an Alert for Work Permit Expiration Date

You can set up a rule to have an alert that notifies the manager 1 month prior to the expiration date of a work permit for an employee.

You can configure your *If* condition so that the system checks:

- Country of the document
- Expiration date of the document

You can configure your *Then* conditions so that the system checks:

- Alert message
- Alert Effective date using *Date Plus* function
- Alert Workflow Information

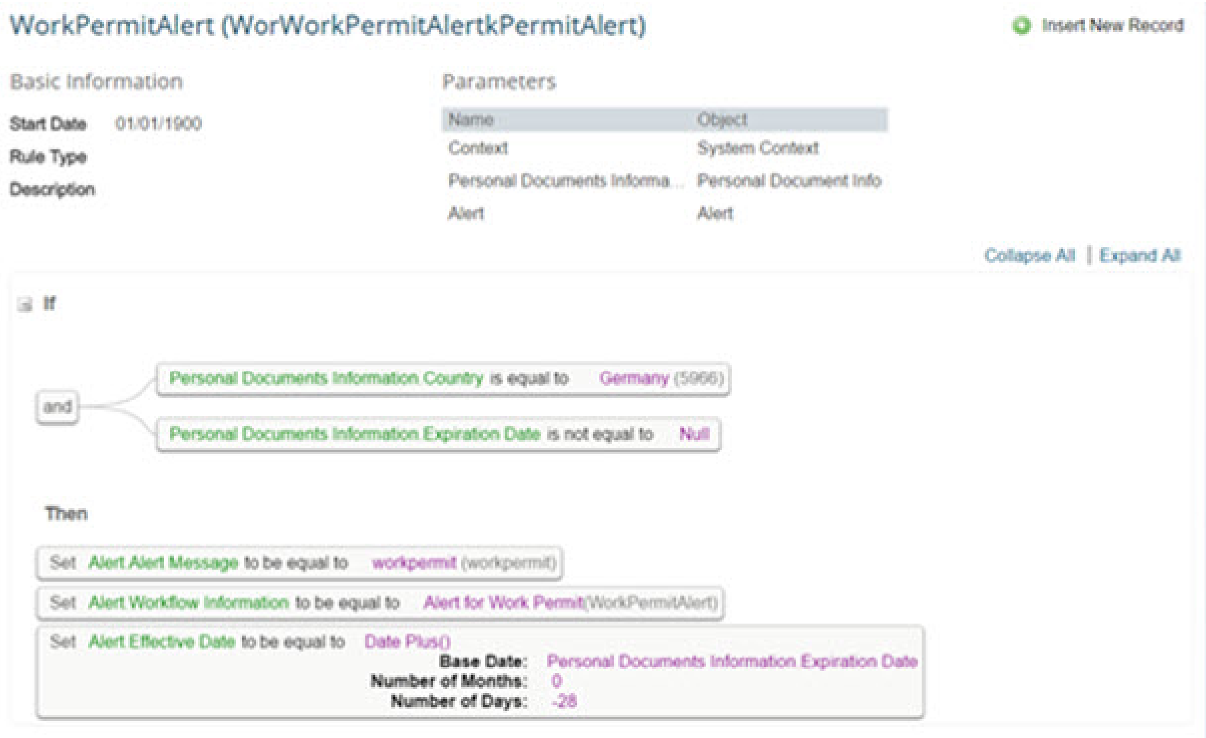



Figure 4: This Screenshot Includes If and Then conditions of Work Permit Expiration Alert Rule

**i Note**

Make sure the value for Alert.Effective Date is not null. If Alert.Effective Date field is null, then alerts will be sent immediately.If you don't want to send an email in case of a null value for Alert.Effective Date, then add them to If condition of the rule.

## Example

On September 1, 2012, Susan updates her work permit info in the system.

Work Permit Germany expiration date 15.2.2017

So, Susan's manager will receive an alert on January 15, 2017 (effective date of the alert). Technically, the alert is generated on September 1, 2012 with an effective date of January 15, 2017.

## Alternative Scenario - Extension

On January 2, 2017, Susan updates the expiration date of her work permit in the system.

Work Permit Germany expiration date 15.2.2020

So, the original alert created for January 15, 2017 is no longer needed. The system deletes the previous alert and creates a new one for the new effective date of January 15, 2020.

### Alternative Scenario - Reduction

On January 2, 2017, Susan updates the expiration date of her work permit in the system.

Work Permit Germany expiry date 10.1.2017.

The alert will be triggered on January 2nd. The system deletes the previous alert, creates a new alert with an effective date of January 2nd, and sends it immediately.

### Alternative Scenario - Extension

On February 1, 2017, Susan updates the expiration date of her work permit in the system.

Work Permit Germany expiration date 10.1.2020

So, the original alert created for January 15, 2017 was triggered and sent. There is no automatic updates or deletion however. The system generates a new alert and creates a new one for the new effective date of December 10, 2019.

> i Note
>
> Already created alert To Dos are not updated automatically when a data change occurs.
>
> The alerts only react to changes in conditions set in the rule. For example, if there is a rule set to create an alert 30 days prior to the end of the probation end date for an employee, but the employee was terminated without changing the probation period end date, then the system will still trigger an alert, even though the employee is no longer at the company.

## 7.4.3 Employment Info Alert

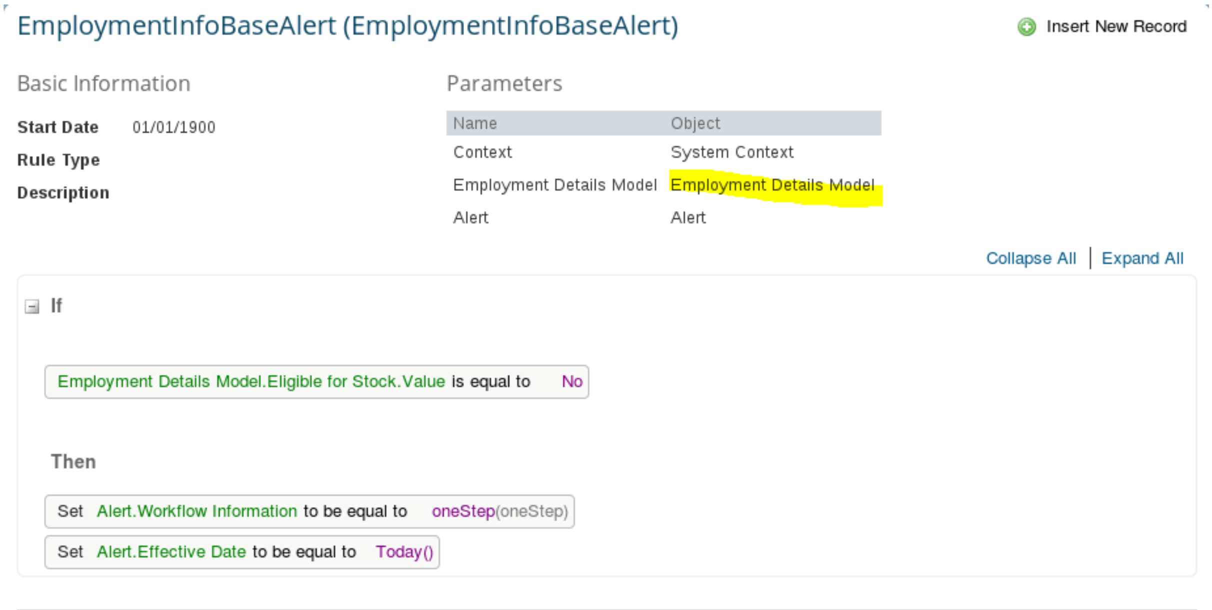
You can from this example in this topic have an idea on how to set up an alert rule for *Employment Information* changes.

### How to Set Up an Alert for Employment Info

You can use the rule where the base object = Employment Details/Employment Details Model.

> i Note
>
> The model name in the rule selection dropdown may differ depending on your SDM setup.
>
> HRIS element ID = employmentInfo
>
> The default/English label = Employment Details

As you can see, *Employment Details Model* name in rule definition is easy to confuse with *Employee Information* or with *Employee Information model*.




## 7.4.4 End of Contract Alert

You can set up alerts to trigger specified number of days before a contract ends for a contingent worker, or employee.

### How to Set Up an Alert for Contract End

You can configure your *If* condition so that the system checks:

- Contract end date isn't equal with previous contract end date value and is not blank
- When contract date is set in the future
- When contract event date value is before a specified date and **contract end** date value are after the same specified date.

> → Tip
>
> If an IF statement contains an expression that checks the current value of a data field against its previous value, editing any other data field in the Information History page may trigger the alert rule defined for the first data field and consequently, users may get redundant alerts. To avoid this, use the pen icon and edit data fields in the window that appears.

You can configure your *Then* conditions so that the system checks:

- Alert message

- Alert Effective date using *Date Plus* function
- Alert Workflow Information

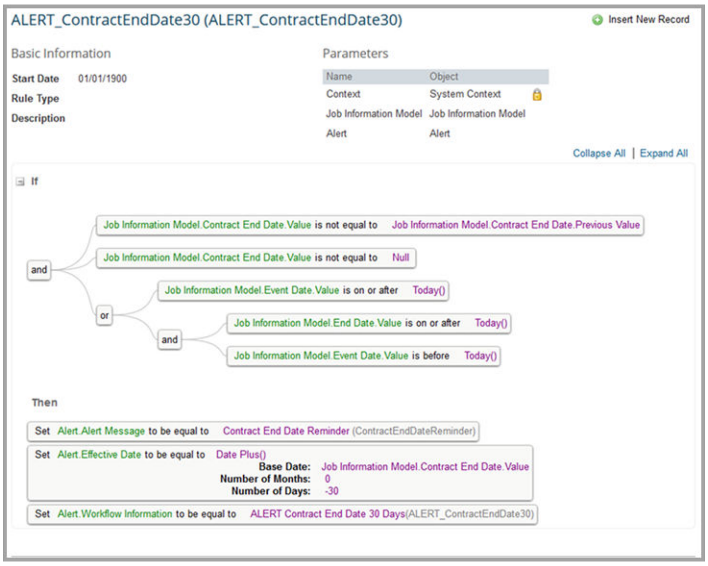



Figure 5: The If-Then Statement for the End of Contract Alert Rule

### *Date Plus* Function

The *Date Plus* function allows you to specify when notification is triggered in relation to the contract end date value:

- *Number of Months*
- *Number of Days*

> **Example**
>
> When you want notifications to be sent out to recipents 30 days before the contract end date, enter in `-30` under the *Number of Days* field in the *Date Plus* function.

## 7.4.5 End of Global Assignment Alert

You can set up alerts to trigger for the end of a global assignment, for example, the day or week before the end date. You can set up a similar rule for the start of a global assignment.

### How to Set Up an Alert for Global Assignment End

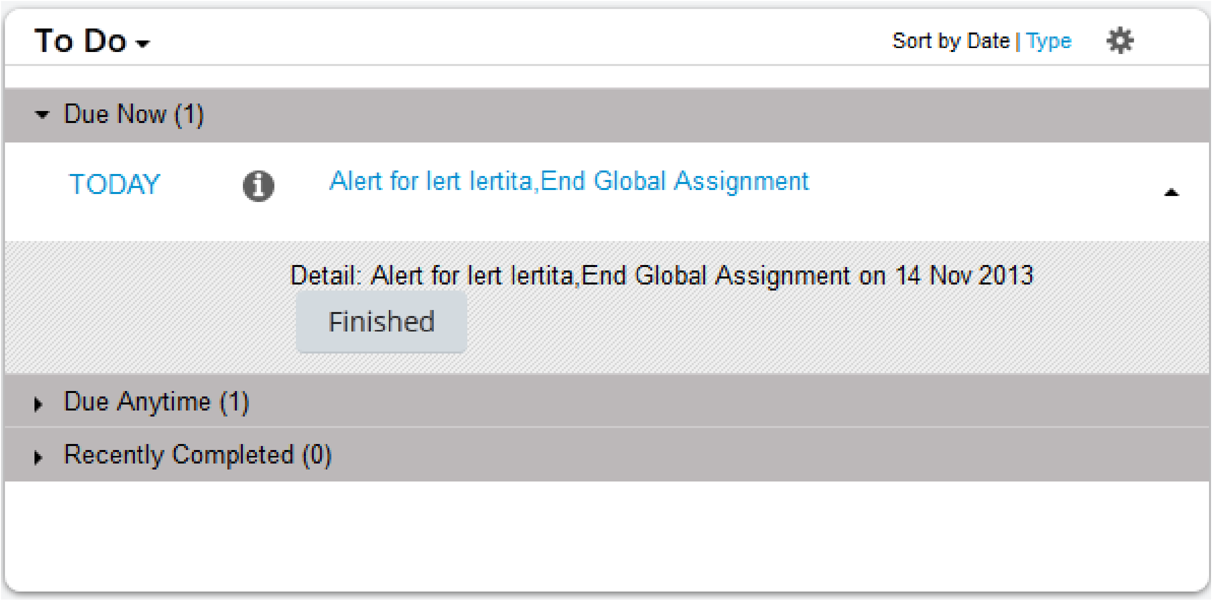
You can configure your *If* condition so that the system checks:

- Event Reason

You can configure your *Then* conditions so that the system checks:

- Alert message
- Alert Workflow Information
- Alert Effective date using *Date Plus* function

The rule will trigger an alert like that illustrated below:




## 7.5 Scheduling Recurring Job for Regular Alert Triggering

With a recurring job, the system regularly checks which records are valid for alerts and creates and sends the alert messages accordingly.

### Context

The job creates alerts according to the IF conditions in the alert rules. When the job sends the alerts is determined by the effective date or the alert due date in the THEN statement of the rule. So, during the job, it checks IF conditions of all alert rules and creates the relevant alerts. At the same time, the job also checks all the created alerts and sends them when they are effective or due.

If a data change requires a workflow approval, no alert is created before the change is approved.

If you have changed the alert rules after the job is run, the existing alerts will be sent based on the rules before the modification. Only after the next job, will the alerts be created and sent based on the new rules and old invalid alerts be deleted.

When there are multiple saveAlert rules defined in each HRIS element and the data record number to be checked by the job is high, the job will take a long time to complete.

→ Recommendation

When the job is run for the first time in the system, schedule a one-time job by specifying a reasonable start date. After this job is run, you can set up a regular job that always checks data changes since the last successful job.

For detailed instructions on creating and submitting a general job request, see "Managing Scheduled Jobs in Provisioning" or "Managing Scheduled Jobs in Admin Center" in Related Information.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

## Procedure

1. In Provisioning, go to *Managing Job Scheduler* > *Manage Scheduled Jobs*.

   → Tip

   You can now create, schedule, and monitor the job also in *Admin Center* > *Scheduled Job Manager*. The daily execution limits for the EC Alerts and Notifications job are: Two times for a one-time job and 1 time for a recurring job.
2. On the *Manage Scheduled Jobs* page, choose *Create New Job*.
3. Set yourself or another responsible project member as the job owner.

   Job owners have the authorization to submit or start a job. They will also be the default user to receive email notifications about the job status.
4. Select *EC Alerts and Notifications* as the job type.
5. Specify the following EC alert job parameters:

| Parameter | Description |
| --- | --- |
| *Current date (MM/DD/yyyy)* | Run the alert job for changes on or after the current date. This option is available for the first EC alert job, that is, no EC alert job has been run for the system before. |
| *Today's and future records only* | Select this option when you want the job to check the current and future records only. This option is available for the first EC alert job, that is, no EC alert job has been run for the system. |

| Parameter | Description |
| --- | --- |
| *Last successful job run date* | Available only when an EC alert job has been run before and recommended for a recurring job. The job checks records that have been changed since the previous job. For the first instance of a recurring job, the system checks when the previous job of the same EC Alerts and Notifications type was run and checks the records changed since then. |
| *Specify a date* | When you select this option, the alert job checks all information record changes on or after the specified date. This option is recommended if you are defining a one-time job.<br><br>→ Recommendation<br><br>For the first time the job is run, we recommend that you define a reasonable date for the field *Specify a date*. When you select the *Specify a date* option, the job will scan all records updated after the specific selected date. When there is a large number of records that created, updated, or imported in the specified date range, the job may take some time to complete. To ensure that the job completes successfully, avoid executing jobs for a excessively large number of records. |

6. Set up job occurrence and notification options.

 → Recommendation

 To make sure that alerts are triggered regularly, we recommend that you set it as a daily job.

7. Click *Create Job* to save the new job.
8. If you are the owner of the job, go to the job list and submit it so that it starts running.

## Results

The job starts running during the active period you have set for the job. Alerts will be created and sent by the job.

## Next Steps

After every completed job, you can check the job results. In Provisioning, go to *Managing Job Scheduler* > *Scheduled Jobs* > *Monitor Jobs* and open the details of a job, and you can see the following information:

- Total number of records checked, processed, and created by entity and Employee Central alert rule name.
- Total number of Employee Central alerts triggered, to-do alerts created, emails sent, and error messages.
- Total time takes for checking, processing, creation, and completion of alerts.

When you want to change your alert rule, make sure that you run an EC alert job afterwards. Otherwise, pending alerts will still be sent based on the results of the previous job.

## Related Information

Managing Scheduled Jobs in Provisioning
Managing Scheduled Jobs in Admin Center

# 7.5.1 Job Execution Overview

Learn about what is done by the system before an EC Alerts and Notifications job runs.

## Stage 1 – Determine which records to pick up

The *Modified since* parameter specifies a date, and all records modified since this particular date will be picked up by the job.

- If it's the first time the job has been run, users see the following three options:
  - *Current date*: All records modified since today (after the job is created) are picked up.
  - *Specify a date*: All records modified since the specified date are picked up.
  - *Today's and future records only*: This is an additional parameter that excludes records with a past effective date from all the records picked up by the job. The first option or the second option can be selected separately, or used together with this option. For example, if you select *Specify a date* and *Today's and future records only*, the system only collects those records that have been modified since the specified date and also have a future effective date.
- If it's not the first time, users see the following two options:
  - *Last successful job run date*: All records modified since the date when the previous job was run are picked up.
  - *Specify a date*: All records modified since the specified date are picked up.

### Stage 2 – Validate entities to create pending alerts in the alerts table

At the second stage, the job will identify all the records based on the list of supported entities, and then validate and process them.

After having obtained the list of entities that it must process, the job checks whether individual entities match the business rule. If yes, an alert entry is created in the alerts table; if not, no entry is created. During the process, the job also deletes any existing alert entries for the current entity. This prevents sending of alerts that become outdated because customers have deleted the alert rule or changed the alert rule logic after the original rule created alerts.

When this process is completed, the last successful job run date is updated to the current date.

### Stage 3 – Process pending alerts to generate to-do alerts and send email notifications

In the last stage, as the job has identified the date and entities that are to be processed, it will create to-do entries and e-mail notifications. First, the job will retrieve the list of supported entities, and then pending alerts for these entities. The Employee Central alerts that are returned are based on their due dates, which are less than or equal to today (covering any alerts that haven't been sent yet, up to and including today).

With the pending alerts list that is generated, the system does the following:

- Creates Employee Central Alert Processor for Employee Central Alerts, Employee Time Alerts, and MDF Alerts
- Deletes uncompleted to-do entries (this is to prevent multiple to-dos from being sent to users if the previous to-do for the same alert is still pending)
- Creates Employee Central alert to-do entries for the step approvers of the workflow configured for that alert
- Sends e-mail notifications to the CC role users of the workflow configured for that alert
- Updates the status of the Employee Central alert to "Completed"

When all entities are processed, the job is finished.

## 7.5.2 Employee Central Alerts Run Concurrently

Employee Central alerts now run in a multithreaded environment that shows alert rules by entity name when you view them in the *Monitor Jobs* tool in Provisioning.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

### Using Monitor Jobs for Alerts

You can access *Monitor Jobs* tool after you've selected your company name within Provisioning. Navigate to *Monitor Jobs* under the *Managing Job Scheduler* section. Alternatively, you can access it by selecting the *Monitor Jobs* link when you are in the *Scheduled Jobs* page. For how to monitor jobs, see Monitoring Scheduled Jobs in Provisioning.

You can view run details by selecting the *Details* link associated with the job that you ran. The run details include the following information:

- Total number of records checked, processed, or created by entity and Employee Central alert rule name.
- Total number of Employee Central alerts triggered, To-dos created, emails sent, and error messages.
- Total time spent on checking, processing, creation, and completion of alerts.

> i Note
>
> With the enhanced *Run Details* feature, it's easy to view the number of records checked, processed, and completed by alert rule name under the entity it's associated with. Besides, the multithreading environment brings performance improvement.

### Related Information

Monitoring Scheduled Jobs in Provisioning

## 7.6 How Old Pending Alerts Are Handled

You can choose whether to delete old pending alerts when a new alert is created following a data change in HRIS effective-dated entities.

### Explanation of the Logic

Here is a typical business scenario: When the end date of an employee's contract approaches, their manager may extend the contract period before a scheduled alert is sent. The previous behavior is that after the manager moves the end date forward, instead of cancelling the original alert and keeping only the new alert, the system would keep and send both. This has confused customers because the original alert is already irrelevant and shouldn't be sent.

You can use the rule setting, "Delete Old Pending Alert Flag", in an alert rule to decide whether to delete any related old pending alerts found. If they don't set the flag or set it to "No", the behavior won't be any different from that of the previous logic; if they set the flag to "Yes", all related old pending alerts are deleted after the new alert is created. Only the alert for a record with the latest effective start date will be kept as the new pending alert. See Example 3 in Examples of Handling Old Pending Alerts in Different Scenarios.

If the rule setting is set to "Yes", we try to find all related old pending alerts after a new alert is created. To determine which old pending alerts are related, we look at these five criteria, in the order they're listed below:

1. Same subject user: First, the old pending alerts are for the same person.
2. Same rule: Then, the old pending alerts are assigned to the same rule (same rule code).
3. Same alert message: Next, the old pending alerts have the same message ID.
4. Same workflow information: Next, the old pending alerts are attached to the same workflow (same workflow FO ID).
5. Same entity type: Finally, the old pending alerts are for an alert rule based on the same entity type. Users can create a rule in jobInfo and delete it and then they create a rule with the same rule code in compInfo. Because two different entity types are involved here, old pending alerts for this rule aren't related.

The following example illustrates how the rule setting is used in an alert rule:

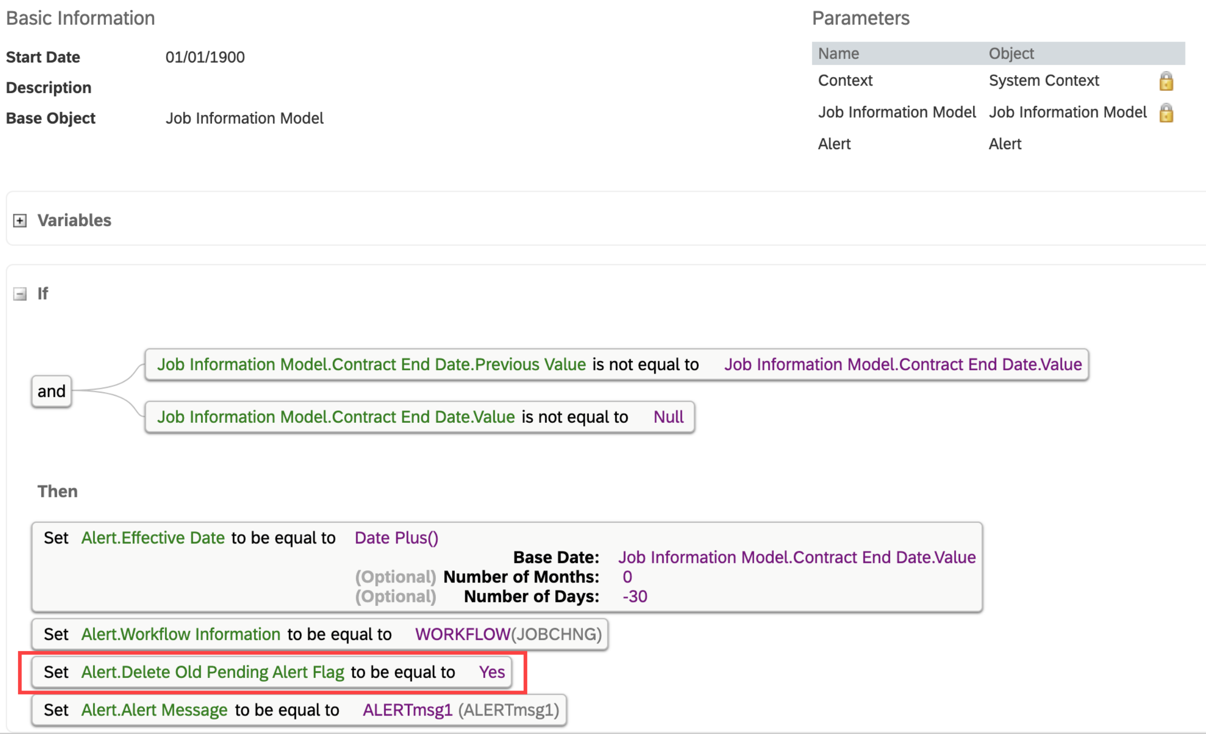



Figure 6: Rule Setting Used in Alert Rule

## Expected Behaviors

- Related old pending alerts are deleted only after a new alert has been created. There may be old pending alerts for history records, but they won't be found and deleted unless new related alerts are created. This is a compromise based on considerations of conserving system resources.
- Only three HRIS effective dated entities are supported: JOB_INFO, COMP_INFO, PAY_COMPONENT_RECURRING. For other entities, current business logics already meet customers' requirements in this regard.

## Unsupported Scenarios

- No contract end date. If a contract end date is null, no date will be scheduled to send an alert and no new alert will be created. Consequently, no old pending alerts will be found and deleted. If you do want to delete them, enter **9999-12-31** as an end date.
- Records of entity deleted. When a record of entity (for example, a jobInfo record) is deleted, it won't trigger any alert rule and no new alert is created. Existing alerts aren't affected in any way.
- Completed alerts. If an alert has already been sent and its to-do has been generated, then it's not a pending alert and it won't be deleted.

## Related Information

Examples of Handling Old Pending Alerts in Different Scenarios [page 140]

# 7.6.1 Examples of Handling Old Pending Alerts in Different Scenarios

If you set "Delete Old Pending Alert Flag" to "Yes" in an alert rule, alerting behavior will be different from when this rule setting wasn't introduced or when it's set to "No". Here are a few typical examples.

## Example 1: New records are inserted, and a new alert is created after each insertion. Action: Old pending alerts are deleted when a new one is created.

Alice is hired on July 20, 2020 and her contract end date is set to August 5, 2021. With her end date set, a future alert (alert 1) about contract end is created and scheduled to be sent one month before the end date, on July 5, 2021.

On December 4, 2020, a new record is inserted, extending her contract end date to August 20, 2022. Another alert (alert 2) about contract end is created and scheduled to be sent on July 20, 2022.

**Previous behavior:** On July 5, 2021, alert 1 is sent anyway, despite that her contract end date has been extended. And on July 20, 2022, alert 2 will also be sent.

**Current behavior (when the rule setting is "Yes"):** On July 5, 2021, alert 1 isn't sent (because it's already deleted), and alert 2 will be sent on July 20, 2022.

## Example 2: Existing records are updated, and this triggers creation of new alerts. Action: Old pending alerts are deleted when a new one is created.

Alice is hired on July 20, 2020 and her contract end date is set to August 5, 2021. With her end date set, a future alert (alert 1) about contract end is created and scheduled to be sent on July 5, 2021.

On December 4, 2020, a new record is inserted, extending her contract end date to August 20, 2022. Another alert (alert 2) about contract end is created and scheduled to be sent on July 20, 2022.

Later, the December 4, 2020 record is edited, further extending the contract end date to August 30, 2022 and a third alert (alert 3) about contract end is created and scheduled to be sent on July 30, 2022.

**Previous behavior:** Both alert 1 and alert 3 are sent, on their respective scheduled dates.

**Current behavior (when the rule setting is "Yes"):** The alert 1 is deleted when alert 2 is created and later alert 2 is deleted when alert 3 is created. The only pending alert is alert 3, which will be sent on July 30, 2022.

## Example 3: A new history record is inserted that doesn't have the latest effective start date. Action: A new alert for the new history record is first created and then deleted.

Alice is hired on July 20, 2020 and her contract end date is set to August 5, 2021. With her end date set, a future alert (alert 1) about contract end is created and scheduled to be sent on July 5, 2021.

On December 4, 2020, a new record is inserted, extending her contract end date to August 20, 2022. Another alert (alert 2) about contract end is created and scheduled to be sent on July 20, 2022.

Later, a new history record, with an effective start date of December 1, 2020, extending her contract end date to August 10, 2023, is inserted on December 5, 2020, leading to creation of alert 3.

**Previous behavior:** All the three alerts are sent on their respective originally scheduled date.

**Current behavior (when the rule setting is "Yes"):** Alert 1 is deleted when alert 2 is created. After alert 3 is created, it's compared to alert 2 and because the related jobInfo record doesn't have the latest effective start date (alert 2 has an effective start date of December 4, 2020), it's soon deleted. The only pending alert is alert 2, which will be sent on July 20, 2022.

# 8 Admin Tasks for Workflows and Alerts

As an admin, you can review all active workflows, monitor and process stalled workflows, and remove invalid pending to-do alerts. To help you have a better understanding of the overall workflow processing status and progress, the system also offers you a number of advanced reports about workflow data.



As an admin, you can review all active workflow requests in the system and act upon them centrally. For example, if a workflow is routed to an inactive user or you want to clean up workflows whose initiators have left the company, you can change approvers or decline the requests to cancel them.



You can monitor and respond to stalled workflow requests from the *Admin Alerts* tile within Admin Center.



You can run and access reports to have an overview of workflows in the system.



You can find out the derived workflow configuration by hovering over the workflow name on the workflow confirmation pop up.



Use the *Manage Alerts and Notifications* dashboard to filter and view the alerts that have been created by the recurring job. If the alerts are no longer valid, to prevent them from being sent, you can delete those alerts before their effective dates. In addition, the dashboard also allows you to view or delete the to-do alerts that are sent but haven't been confirmed.



The Admin Alerts tile provides a convenient access to stalled workflows and workflows with invalid approvers.



You can use *Admin Alerts* to find workflows of your interest and process them all at once.



Learn about workflow functionality on the latest home page.

## Related Information


Advanced Reporting for Workflows [page 151]
Managing Workflow Requests as Admin [page 143]
Responding to Stalled Workflows in Admin Alerts [page 148]

## 8.1 Managing Workflow Requests as Admin

As an admin, you can review all active workflow requests in the system and act upon them centrally. For example, if a workflow is routed to an inactive user or you want to clean up workflows whose initiators have left the company, you can change approvers or decline the requests to cancel them.

### Prerequisites

You have the *Manage Workflow Requests* permission.

### Context

For workflows pending at inactive users, you can also go to their Employment Information page of the People Profile to view the pending workflows.

### Procedure

1. Go to *Admin Center* > *Manage Workflow Requests*.
2. Search for the requests that you want to work with. The available search criteria:

| Criteria | Description |
| --- | --- |
| Requested By | Select a workflow initiator user for whom you have permissions.<br><br>→ Tip<br><br>You can find and select inactive users in the *Requested By* and *Requested For* fields. This allows you to find workflows with an inactive initiator or inactive subject user. |
| Requested For | Select a subject user for whom you have permissions. |

| Criteria | Description |
| --- | --- |
| Request Type | Select a workflow type, for example, Transfer or Promotion. The options include both the event reasons and predefined request types. Event reasons are displayed as `<Event Reason Title>(<Event Reason ID>)>`.<br><br>→ Tip<br><br>To search for workflows related to a specific MDF object, choose *Change Generic Object Action* as the request type and then specify a specific object. |
| Request Status | Status of the workflow, for example, completed or pending. |
| Stalled for Days | This field only appears if you have selected Pending or Sent back as the request status. Enter the number of the days – how long the workflows are stalled. |
| Effective Date From/To | Enter the time period in which the data contained in the workflow becomes effective. |
| Requested Start/End Date | Enter the time period in which the change/request has been made. |

3. Choose *Search* to find workflow requests meeting your criteria.
4. Do any of the following to workflow requests found.

| Action | Description |
| --- | --- |
| Lock Down | You can lock a workflow, so that it is prevented from further processing. |
| Unlock | Unlock the locked workflow, so that it is available for further processing. |
| Add Approver | If needed, you can add an additional approval step as approver to a certain workflow. You can specify whether further workflow changes are allowed. |
| Change Approver | You can exchange an approver for another employee. You can specify whether workflow changes are allowed. |
| Remove Approver | You can delete an approver for the workflow. |
| Route Request | You can skip an approval step with this action. |
| Decline | You can decline a request, if it's not a valid request anymore. |

| Action | Description |
|---|---|
| Change Initiator | For workflows that are sent back, you can change the initiator so that somebody else can withdraw or resubmit the request. |

## Results

The workflow has been processed. Depending on your action, its status has changed, or the workflow has been routed to the new approver.

**Task overview:** Admin Tasks for Workflows and Alerts [page 142]

## Related Information

Stalled Workflow Requests [page 145]
Advanced Reporting for Workflows [page 151]
Troubleshooting Workflow Configuration Derivation [page 152]
Managing Pending Alerts [page 152]
Workflows in Admin Alerts [page 154]
Batch-Processing Workflows in Admin Alerts [page 155]
Workflows on the Latest Home Page [page 156]
List of Role-Based Permissions

# 8.2 Stalled Workflow Requests

You can monitor and respond to stalled workflow requests from the *Admin Alerts* tile within Admin Center.

## Stalled Workflow Requests

When an approver at a workflow step does not respond to a workflow request timely and the workflow cannot proceed to the next step, that workflow is called "stalled". You can access such workflows within Admin Center and do something about them. And there're other times when managers have been terminated in the system and you need to check that there are no stalled workflows left for their attention.

Configuring the Admin Alerts Tile for Stalled Workflows [page 146]
To ensure workflows are acted upon promptly, you can set up the *Admin Alerts* tile in Admin Center to show stalled workflows.

Responding to Stalled Workflows in Admin Alerts [page 148]
Using the *Admin Alerts* page, you can monitor the stalled workflows in the system and act on them centrally.

**Parent topic:** Admin Tasks for Workflows and Alerts [page 142]

### Related Information

Managing Workflow Requests as Admin [page 143]
Advanced Reporting for Workflows [page 151]
Troubleshooting Workflow Configuration Derivation [page 152]
Managing Pending Alerts [page 152]
Workflows in Admin Alerts [page 154]
Batch-Processing Workflows in Admin Alerts [page 155]
Workflows on the Latest Home Page [page 156]

## 8.2.1 Configuring the Admin Alerts Tile for Stalled Workflows

To ensure workflows are acted upon promptly, you can set up the *Admin Alerts* tile in Admin Center to show stalled workflows.

### Prerequisites

You have the *Access Admin Alerts* permission.

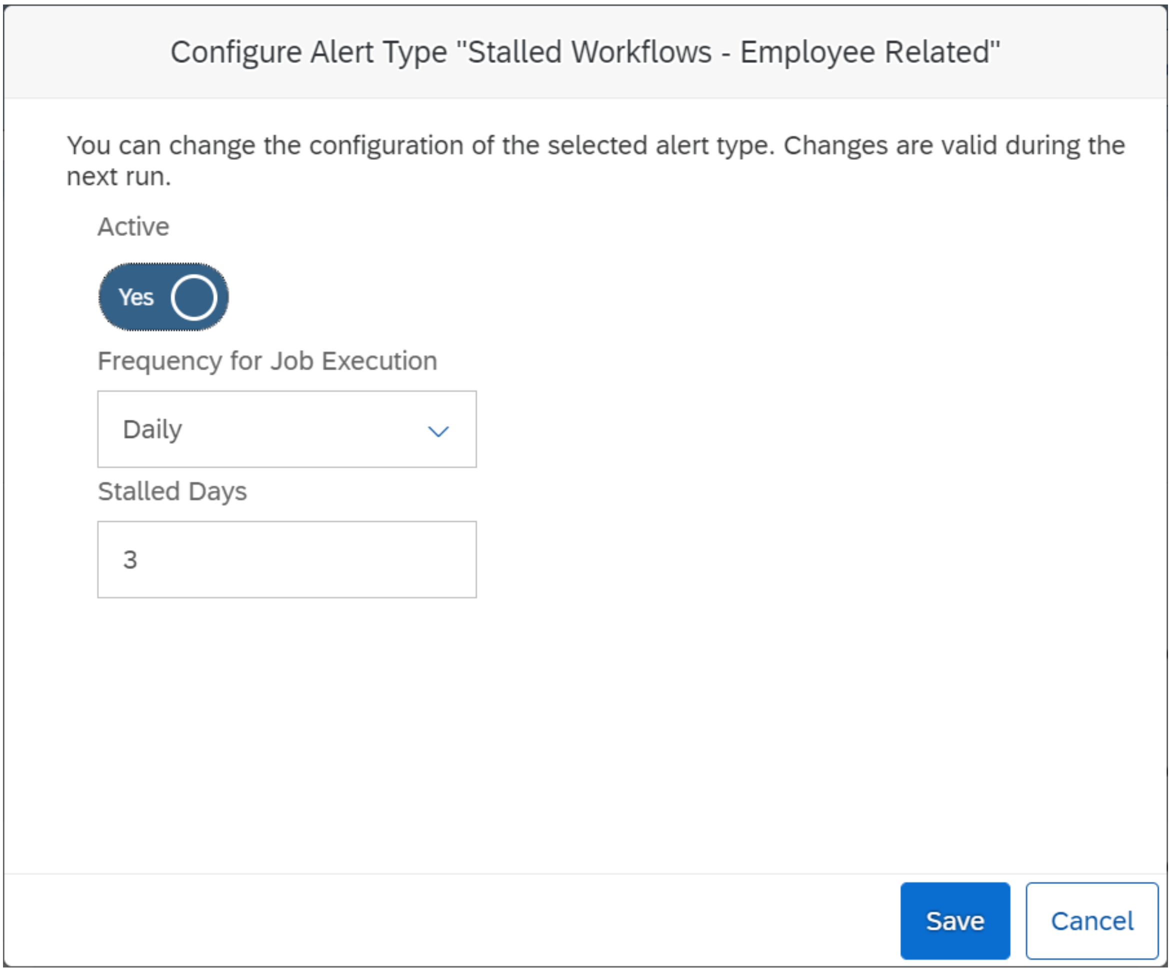
### Context

The *Admin Alerts* tile is only available in the NextGen Admin Center.

### Procedure

1. In Admin Center, choose *See More* on the *Admin Alerts* tile.
2. On the *Admin Alerts* page that appears, choose a workflow-related alert type from the dropdown list, for example, "Stalled Workflows - Employee Related".
3. Choose the *Configure Alert Type* button at the top of the page.

4. Specify the options for the particular alert type.




You can turn on or turn off the scheduled job that fetches stalled workflows; specify how frequently the job runs; and include only workflows that have been stalled for a specified number of days.

5. Save your changes.

## Results

The *Admin Alerts* tile has been configured to display stalled workflow requests.

**Task overview:** Stalled Workflow Requests [page 145]

## Related Information

Responding to Stalled Workflows in Admin Alerts [page 148]
List of Role-Based Permissions

Responding to Stalled Workflows in Admin Alerts [page 148]
Responding to Stalled Workflows in Admin Alerts [page 148]

## 8.2.2 Responding to Stalled Workflows in Admin Alerts

Using the *Admin Alerts* page, you can monitor the stalled workflows in the system and act on them centrally.

### Prerequisites

- The *Admin Alerts* tile has been set up to display stalled workflows.
- You have the *Access Admin Alerts* permission. To see stalled workflows on the tile, you also need additional workflow-related Admin Alert Object Permissions, such as *Stalled Workflows - Employee Related*.

### Procedure

1. Go to *Admin Center* > *Admin Alerts*.

   → Tip

   You can go to *Admin Alerts* either by searching for "Admin Alerts" in the global search box or by choosing an item on the *Workflow* section of the *Admin Alerts* tile. If there're too many alerts on the tile, the *Workflow* section may not be displayed. In this case, you need to choose *See More* to land on the *Admin Alerts* page.
2. From the *Admin Alert Type* list, choose a workflow-related alert type.

   Table 9: Workflow-Related Admin Alert Types

| Admin Alert | Description |
|---|---|
| Stalled Workflows - Employee Related | Use this to find stalled workflows that are not the following types: Foundation Object changes; Hire or New Hire work-flows without an assigned manager. |
| Stalled Workflows - Non-Employee Related | Use this to find stalled workflows that are the following types: Foundation Object changes; Hire or New Hire work-flows without an assigned manager. |
| Invalid Approvers in Employee-Related Workflows | Use this to find workflows that have an invalid approver and are not the following types: Foundation Object changes; Hire or New Hire workflows without an assigned manager. |
| Invalid Approvers in Non-Employee-Related Workflows | Use this to find workflows that have an invalid approver and are the following types: Foundation Object changes; Hire or New Hire workflows without an assigned manager. |

| Admin Alert | Description |
|---|---|
| Workflows for Employee Position Change with Deleted Subject User | Use this to find workflows that involve a position change to subject users who have already been deleted. They're invalid and may block changes to the position involved. Workflows found by this type are a subset of those found by *Workflows with Deleted Subject User*. |
| Workflows with Deleted Subject User | Use this to find workflows whose subject users have already been deleted. If any of these workflows are for generic objects, such as Position, they'll block changes to the objects involved. |

3. **Optional:** On the top of the *Alerts* table, choose ⚙ *Settings* to show or hide columns and apply filters.

   Note that the columns available for you to choose from vary, depending on which alert type you just selected. The following are some of the most useful columns:

   Table 10: Columns and Usage

| Column Name | More Information |
|---|---|
| *Requested By* | Person that initiated the workflow request. |
| *Requested For* | The subject user that the request is intended for. Applicable for Employee Central and person-based *MDF* workflows only. When it's an object-based workflow, this column is blank. |
| *Effective Date* | For workflows where effective date is applicable, the effective date appears in this column. |
| *Stalled Days* | Number of days for which the workflow request has been stalled. |
| *Single Approver Name* and *Single Approver* | If the resolved step approver is a single approver, they show the current approver's name and ID. They are particularly useful when workflows have been delegated or escalated:<br>• If a workflow has been delegated and now awaits response from the delegatee, the new column shows the delegatee's name.<br>• If a workflow has been escalated and now awaits response from the escalatee, the new column shows the escalatee's name.<br>• If a workflow has first been delegated and then escalated and it now awaits response from the escalatee, the new column shows the escalatee's name. |
| *Dynamic Group Name* and *Dynamic Group* | If the resolved step approver is a dynamic group, they show the dynamic group's name and ID. |

| Column Name | More Information |
|---|---|
| *Position Name* and *Position* | For the alert types *Stalled Workflows - Employee Related* or *Stalled Workflows - Non-Employee Related*: If the resolved step approver is a position, they show the position's name and ID. |
| *Position Name* and *Position ID* | For the alert type *Workflows for Employee Position Change with Deleted Subject User*: They show the name and ID of the specific position that is involved in the data change. |

4. Select one or more workflows and respond to them by choosing any of the following actions.

   Note that here HR admins can operate on the workflows in bulk, such as declining, without additional RBP permissions, and that the actions available for you to choose from vary, depending on which alert type you just selected.

| Action | If You Want to |
|---|---|
| **Change approver** | Specify a new approver for the selected workflows. Next, the workflows will be routed to the new approvers. |
| **Decline** | Decline the stalled workflow request, for example, if it's no longer valid. |
| **Lock down** | Prevent other approvers from processing the selected stalled workflows. This will also remove the requests from those approvers' to-do tile and alert notifications. |
| **Route to next step** | Let the request go to the next-step approver. |

## Results

You responded to the selected workflow requests.

**Task overview:** Stalled Workflow Requests [page 145]

## Related Information

Configuring the Admin Alerts Tile for Stalled Workflows [page 146]
List of Role-Based Permissions
Configuring the Admin Alerts Tile for Stalled Workflows [page 146]
Configuring the Admin Alerts Tile for Stalled Workflows [page 146]

## 8.3 Advanced Reporting for Workflows

You can run and access reports to have an overview of workflows in the system.

The following reports are available:

- **Open Workflow Requests**
  This report lists all still pending workflow requests that need to be approved.
- **Workflow Processing Time Statistics**
  This report provides the processing times for the different workflow requests steps. For example, a 3-step approval process where all steps are completed by a different processor within 2 days, would be reported containing 3 records with 2 days each.
- **Workflow Processing Statistics**
  This report lists the total number of workflow requests for certain events together with the status of the workflow.
- **Workflow Request Analysis**
  This report lists all employees who have made a workflow request either by themselves or on behalf of another employee.

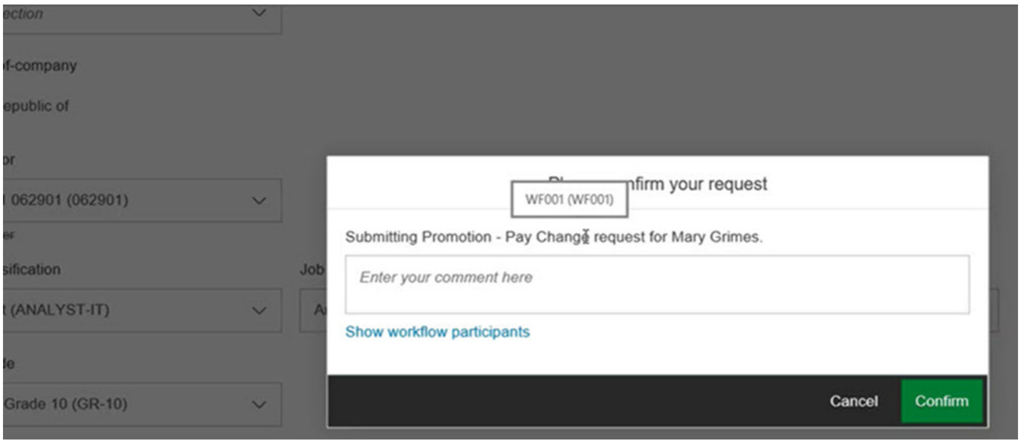
**Parent topic:** Admin Tasks for Workflows and Alerts [page 142]

### Related Information

Managing Workflow Requests as Admin [page 143]
Stalled Workflow Requests [page 145]
Troubleshooting Workflow Configuration Derivation [page 152]
Managing Pending Alerts [page 152]
Workflows in Admin Alerts [page 154]
Batch-Processing Workflows in Admin Alerts [page 155]
Workflows on the Latest Home Page [page 156]
Employee Central Advanced Reporting Implementation
SAP SuccessFactors Workforce Analytics

## 8.4 Troubleshooting Workflow Configuration Derivation

You can find out the derived workflow configuration by hovering over the workflow name on the workflow confirmation pop up.




The derived workflow configuration is easily accessible to speed up implementation and to ease problem analysis.

**Parent topic:** Admin Tasks for Workflows and Alerts [page 142]

### Related Information


Managing Workflow Requests as Admin [page 143]
Stalled Workflow Requests [page 145]
Advanced Reporting for Workflows [page 151]
Managing Pending Alerts [page 152]
Workflows in Admin Alerts [page 154]
Batch-Processing Workflows in Admin Alerts [page 155]
Workflows on the Latest Home Page [page 156]


## 8.5 Managing Pending Alerts

Use the *Manage Alerts and Notifications* dashboard to filter and view the alerts that have been created by the recurring job. If the alerts are no longer valid, to prevent them from being sent, you can delete those alerts before their effective dates. In addition, the dashboard also allows you to view or delete the to-do alerts that are sent but haven't been confirmed.

## Prerequisites

You have the *Manage Alerts and Notifications* permission. You can find it under *Administrator Permissions* > *Manage Workflows* in the *Manage Permission Roles* admin tool.

## Context

In the *Pending Alerts* tab, you can find the created alerts that are to be sent as an email notification or a to-do alert (how they are sent depends on your workflow configurations). Whereas the *Pending To-Dos* tab lists the to-do alerts that have been sent but haven't been confirmed by the recipients.

## Procedure

1. Go to *Admin Center* > *Manage Alerts and Notifications*.
2. On one of the tabs, search for alerts using available filters. The filters include:

| Filter | Description |
|---|---|
| **Recipient** | Recipient of the alert. Note that it is only relevant for pending to-dos. |
| **Initiated For** | Subject user of the alert. |
| **Alert Type** | Whether it is alert for Employee Central or MDF data. |
| **Entity Type** | The relevant HRIS element for MDF object. |
| **Alert Effective Date** | Select a time period to filter for the alerts that are to be sent during this period. |
| **Entity Effective Date** | Select a time period to filter for the alerts based on the effective date of the relevant subject data.<br>i Note<br>Only relevant for data that has an effective date. |
| **Alert Message** | The message based on which the alert is created. |
| **Alert Rule Name** | The rule that triggers the alert. |
| **Alert Workflow** | The workflow with which you define the alert recipients. |

3. Review the pending alerts or pending To-Dos. If they are no longer valid, you can delete them.

**Task overview:** Admin Tasks for Workflows and Alerts [page 142]

## Related Information

Managing Workflow Requests as Admin [page 143]
Stalled Workflow Requests [page 145]
Advanced Reporting for Workflows [page 151]
Troubleshooting Workflow Configuration Derivation [page 152]
Workflows in Admin Alerts [page 154]
Batch-Processing Workflows in Admin Alerts [page 155]
Workflows on the Latest Home Page [page 156]
List of Role-Based Permissions

# 8.6 Workflows in Admin Alerts

The Admin Alerts tile provides a convenient access to stalled workflows and workflows with invalid approvers.

Workflows listed on the tile are grouped into two categories: employee-related (workflows with a subject user) and non-employee-related (workflows without a subject user). Employee-related workflows concern employees within the target population of your permission role, while non-employee-related workflows concern either foundation objects or new hires without a manager yet.

The Admin Alerts tile also lists dynamic roles with invalid users, making it easy for you to pinpoint such roles and remove any invalid users on the fly.

To access the tile and view all workflows, you need to configure the Admin Alerts Object Permissions for your role, choosing *View* for all *Visibility* options. These permissions are required only if you want access to employee-related workflows. For access to non-employee-related workflows, they are not required.

To learn more about what this tile can do, see Admin Alerts.

**Parent topic:** Admin Tasks for Workflows and Alerts [page 142]

## Related Information

Managing Workflow Requests as Admin [page 143]
Stalled Workflow Requests [page 145]
Advanced Reporting for Workflows [page 151]
Troubleshooting Workflow Configuration Derivation [page 152]
Managing Pending Alerts [page 152]
Batch-Processing Workflows in Admin Alerts [page 155]
Workflows on the Latest Home Page [page 156]

## 8.7 Batch-Processing Workflows in Admin Alerts

You can use *Admin Alerts* to find workflows of your interest and process them all at once.

### Prerequisites

To access *Admin Alerts*, obtain permissions under the *Admin Alerts* and Admin *Alerts Object Permissions* categories.

### Procedure

1. Go to the *Admin Alerts* tile in *Admin Center*.
2. Choose the workflow category you want to work on. For example, you can choose workflows with invalid approvers or stalled workflows.
3. **Optional:** In the page that appears, choose the *Settings* icon ( ) to sort or filter workflows in this particular category.
4. Select workflows that will be processed.

   > → Tip
   >
   > You can choose workflows one by one; alternatively, if all the workflows displayed on the page have to be selected, you can check the box at the top-left corner.

5. Choose an action you want to take for these selected workflows.

   You can choose any of the following actions from the *Action* dropdown list:
   - Recheck:
   - Change approver
   - Decline
   - Lock down:
   - Route to next step

**Task overview:** Admin Tasks for Workflows and Alerts [page 142]

### Related Information

Managing Workflow Requests as Admin [page 143]
Stalled Workflow Requests [page 145]
Advanced Reporting for Workflows [page 151]
Troubleshooting Workflow Configuration Derivation [page 152]

Managing Pending Alerts [page 152]
Workflows in Admin Alerts [page 154]
Workflows on the Latest Home Page [page 156]

## 8.8 Workflows on the Latest Home Page

Learn about workflow functionality on the latest home page.

Workflows are part of Employee Central.

If workflows are configured and the latest home page is enabled, Employee Central includes the following content on the home page.

Table 11:

| Name | Description | Where Shown | When Shown | Prerequisites | On Mobile App? |
|---|---|---|---|---|---|
| *Delegate Workflows* | Enables you to request a co-worker to process your workflows during a specified period, directly from the home page. | *Quick Actions* | Always shown, based on system configuration and user permission. | • You have *Manage Workflows* > *Allow Auto Delegation* permission.<br>• You have MDF object permission.<br>• It's selected at *Manage Home Page* > *Quick Actions*. | Yes |

| Name | Description | Where Shown | When Shown | Prerequisites | On Mobile App? |
|---|---|---|---|---|---|
| *Approve Employee Central Workflow* | Enables you to approve pending Employee Central object or foundation object workflow requests. Links you to details.<br><br>Initially, requests appear in the *Approvals* section, where you can approve or decline. If a task is sent back by a subsequent approver in the workflow, it appears in the *For You Today* section, so you can review and update it as necessary.<br><br>(To-Do Category 14) | *Approvals* (for initial approval)<br>*For You Today* (if sent back) | Appears initially when you have an Employee Central object or Foundation Object workflow to approve. Appears again if the request is sent back by a subsequent approver in the workflow.<br><br>Disappears when the workflow is approved, declined, sent back, or delegated. Or, if no action is taken, it disappears 180 days after the due date (if set) or the Last Modified date (if there's no due date). | When the *Prevent Quick Approval for Workflow* permission is enabled for approvers, they cannot approve the request directly from the card; instead, they have to use the *View Details* link to open the workflow details page to approve the request. | Yes |

| Name | Description | Where Shown | When Shown | Prerequisites | On Mobile App? |
|---|---|---|---|---|---|
| *Workflow Delegation Request* acceptance | Prompts you to accept or reject auto-delegation requests from other people. You can see the delegator's name and photo and their requested auto-delegation period. Then you can decide whether to accept or reject the request.<br><br>(To-Do Category 77) | *For You Today* | Appears when someone requests to have their workflow tasks automatically delegated to you, so you can process workflows on their behalf during a specified period.<br><br>Disappears after you accept or reject the delegation request; when the delegator changes the delegatee or turns off auto-delegation; after the auto-delegation end date; or after the due date (if set) or the Last Modified date (if there's no due date). | The option *Allow Delegatees to Accept or Reject a Workflow Delegation Request* in *Admin Center* > *Company System and Logo Settings* is selected. | Yes |
| *Upcoming Delegation* acknowledgment | Prompts you to acknowledge an upcoming or ongoing workflow delegation. You can see the delegator's name and photo and the accepted auto-delegation period.<br><br>(To-Do Category 77) | *For You Today* | Appears after a delegation request was accepted by you (or automatically by the system for you).<br><br>Disappears when dismissed; if the delegator changes the delegatee or turns off auto-delegation; after the auto-delegation end date; or after the due date (if set) or the Last Modified date (if there's no due date). | If the option *Allow Delegatees to Accept or Reject a Workflow Delegation Request* is not selected, the system automatically accepts delegation requests for you and you also see this acknowledgment task. | Yes |

**Parent topic:** Admin Tasks for Workflows and Alerts [page 142]

## Related Information

Managing Workflow Requests as Admin [page 143]
Stalled Workflow Requests [page 145]
Advanced Reporting for Workflows [page 151]
Troubleshooting Workflow Configuration Derivation [page 152]
Managing Pending Alerts [page 152]
Workflows in Admin Alerts [page 154]
Batch-Processing Workflows in Admin Alerts [page 155]

# 9 Using Workflows and Alerts

Learn how to access and manage your workflow requests. You have a variety of options, such as assigning workflows to yourselves, delegating workflows to someone else, and making changes to the workflow transactions.



## 9.1 Workflow Tasks on the Latest Home Page

The latest home page provides an easier way for users to access workflows and perform common workflow-related tasks.

If you've upgraded to the latest home page and obtained required permissions, you can do the following on the latest home page. See topics in the Related Information section for more details.

## Configure Workflow Auto-Delegation

You can use the *Delegate Workflows* tile in the Quick Actions section to set up your auto-delegation.

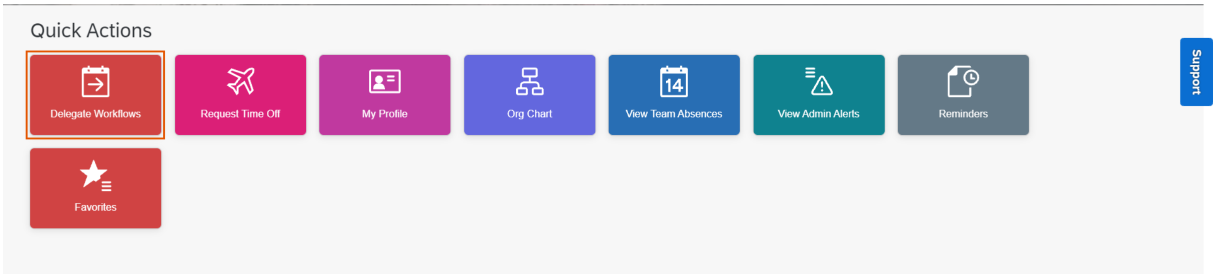



Figure 7: Delegate Workflows

## Respond to Auto-Delegation Requests and Get Notified of Upcoming Delegations

If your company requires you to accept or decline delegation requests, you can directly respond to such requests on the latest home page. Delegatees also see reminders about currently active delegations.

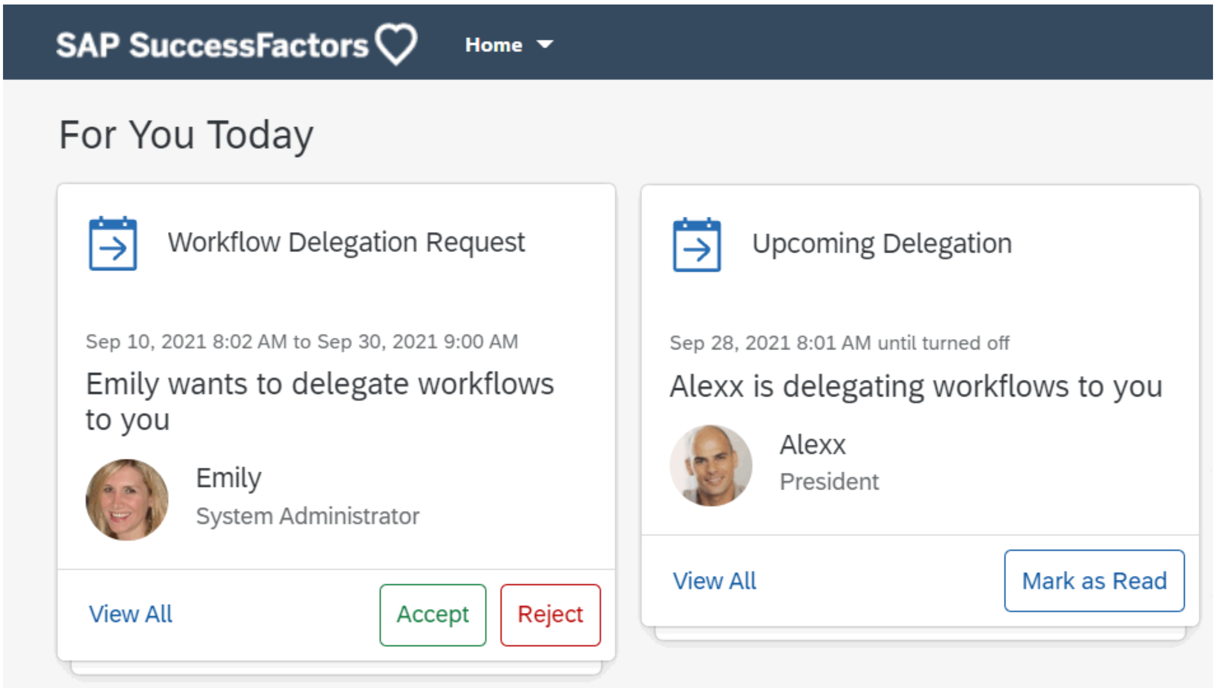



Figure 8: Auto-Delegation Request and Reminder

## Process Workflow Requests

You can access pending and sent-back workflow requests, directly respond to them, or open a workflow details page to review data changes and take further actions.

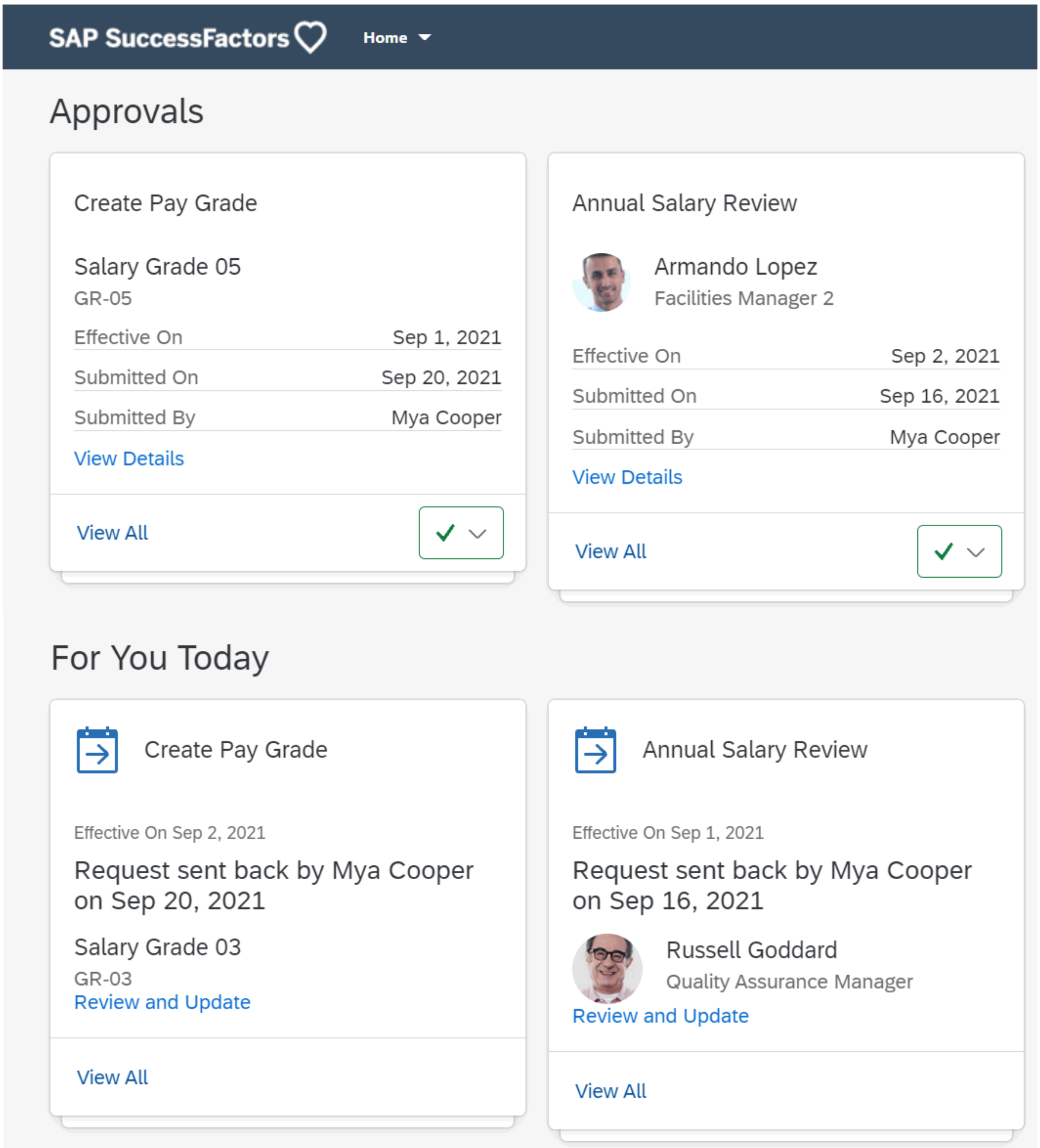



Figure 9: Workflow Requests

## Related Information

Setting Up Automatic Workflow Delegation (for Employees) [page 196]
Accepting or Rejecting Delegation Requests from the Latest Home Page [page 200]
Accessing Workflow Requests on the Latest Home Page [page 173]

## 9.2 Accessing Workflows

This topic gives you a brief overview on how you can access pending workflow requests in Employee Central.

> ⚠ Caution
>
> The legacy home page is in deprecation. It's no longer available for most customers.
>
> Visit the SAP SuccessFactors Customer Community Migration to Reimagined Home Page - Innovation Alert for all the latest updates.

### Accessing Workflows

You can access workflows a number of different ways, which can be specified based on homepage or role-based permissions:

- *Approve Requests* tile under the To-Do section on the legacy home page.
- *To-Do Alerts* when you select the checkmark icon in the global header.
- *Pending Requests* tile on the legacy home page.
- Employee *QuickCards*
- *Pending Requests* in subject users *People Profile*
- *Pending Requests* on your mobile device.

Accessing Workflows Using the Approve Requests Tile [page 164]
You can access your workflows using the *Approve Request* tile under the *To-do* section on the legacy home page.

Accessing Workflows Using To-Do Alerts [page 165]
You can access your pending workflows using the to-do alerts icon in the global page header.

Accessing Workflows Using the Pending Requests Tile [page 166]
Using the four portlets on the *Pending Requests* page, you can view all the workflows that concern you and take actions accordingly.

Accessing Pending Requests From Employee Quickcards [page 168]
You can access your pending workflow requests from the employee *Quickcard* by selecting the *Pending Requests* link.

Accessing Pending Workflow Requests in People Profile [page 169]
When there is a pending workflow for a subject user, you can access the workflow details page when you select the pending future link found in the subject users profile page. When you are the approver, you can approve the pending workflows directly.

Accessing Pending Workflow Requests Using Mobile [page 171]
You can access your pending workflow requests using SAP SuccessFactors mobile application.

Accessing Workflow Requests on the Latest Home Page [page 173]
Users can access pending and sent-back workflow requests directly from the latest home page.

## 9.2.1 Accessing Workflows Using the Approve Requests Tile

You can access your workflows using the *Approve Request* tile under the *To-do* section on the legacy home page.

### Prerequisites

The legacy home page and role-based permissions are enabled.

### Context

This feature is only available on the legacy home page.

> ⚠ Caution
>
> The legacy home page is in deprecation. It's no longer available for most customers.
>
> Visit the SAP SuccessFactors Customer Community Migration to Reimagined Home Page - Innovation Alert for all the latest updates.

### Procedure

1. To access your workflows using the *Approve Requests* tile, go to *Home* > *Approve Requests*:

   When you select the *Approve Requests* tile, the *Approve Requests* dialog box appears. Here you can approve your workflows.

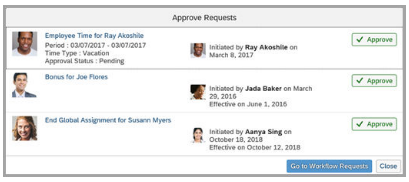
   
   

   Figure 10: Screenshot of the *Approve Requests* Dialog Box

   > → Tip
   >
   > If the *Professional Edition Manage Workflow Requests* has been enabled in role-based permission, choosing the *Approve Requests* tile will take you directly to the *My Workflow Requests* page. In this case, the *Approve Request* dialog box doesn't appear.

2. To go to the *My Worklow Requests* page from the *Approve Request* dialog box, choosing *Go to Workflow Requests*.

View and approve individual workflows from the *Approve Requests* dialog box; view workflow requests, check their key details, scroll down to load more workflow requests, or select multiple ones to perform batch approvals in the professional edition of *Manage Workflow Requests*.

**Task overview:** Accessing Workflows [page 163]

## Related Information

Accessing Workflows Using To-Do Alerts [page 165]
Accessing Workflows Using the Pending Requests Tile [page 166]
Accessing Pending Requests From Employee Quickcards [page 168]
Accessing Pending Workflow Requests in People Profile [page 169]
Accessing Pending Workflow Requests Using Mobile [page 171]
Accessing Workflow Requests on the Latest Home Page [page 173]

# 9.2.2 Accessing Workflows Using To-Do Alerts

You can access your pending workflows using the to-do alerts icon in the global page header.

## Procedure

1. To access workflows using the to-do alerts side panel, locate the ✓ icon in the global page header and select it so that the side panel appears.

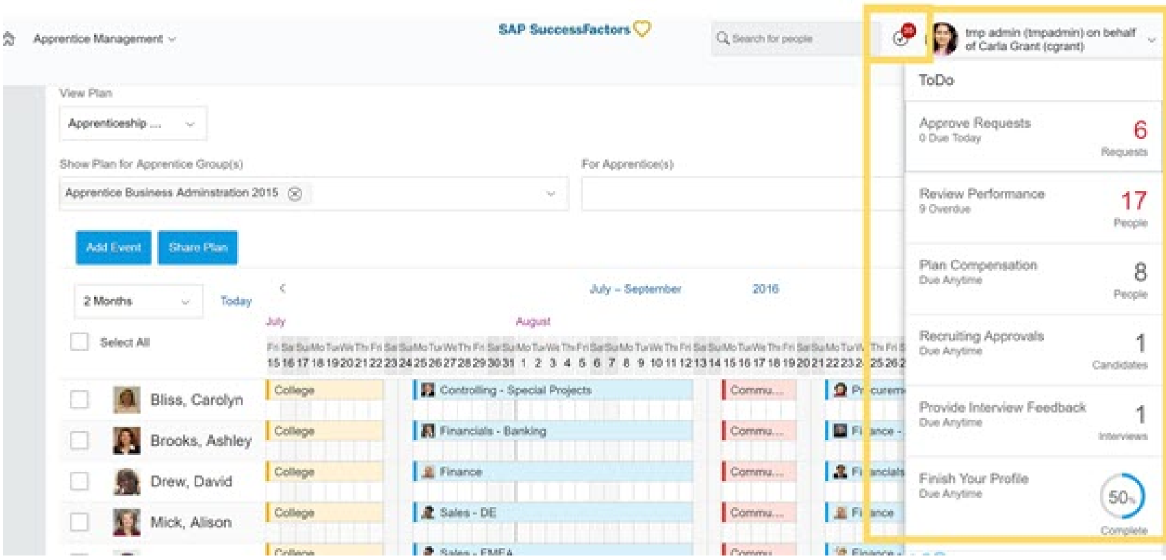



Figure 11: Screenshot of Side Panel Menu Below the Global Checkmark Icon

2. To access your workflows select *Approve Requests* in the side panel menu.

   When you select the *Approve Requests* link, the *Approve Requests* dialog box appears.

   > → Remember
   >
   > When you have *Professional Edition Manage Workflow Requests*, you go directly to the *My Workflow Requests* page instead.

3. To go to the *My Worklow Requests* page from the *Approve Request* dialog box, select *Go to Workflow Requests*.

   From the *My Workflow Requests* page, you can select multiple workflows requests to approve.

**Task overview:** Accessing Workflows [page 163]

## Related Information

Accessing Workflows Using the Approve Requests Tile [page 164]
Accessing Workflows Using the Pending Requests Tile [page 166]
Accessing Pending Requests From Employee Quickcards [page 168]
Accessing Pending Workflow Requests in People Profile [page 169]
Accessing Pending Workflow Requests Using Mobile [page 171]
Accessing Workflow Requests on the Latest Home Page [page 173]

# 9.2.3 Accessing Workflows Using the Pending Requests Tile

Using the four portlets on the *Pending Requests* page, you can view all the workflows that concern you and take actions accordingly.

## Prerequisites

The *Pending Requests* tile has been added to the legacy home page.

## Context

This feature is only available on the legacy home page.

> ⚠ Caution
>
> The legacy home page is in deprecation. It's no longer available for most customers.

Visit the SAP SuccessFactors Customer Community Migration to Reimagined Home Page - Innovation Alert for all the latest updates.

→ Tip

For more information on how to create the *Pending Requests* tile on the legacy home page, see Creating Pending Requests Tile from the Home Page.

## Procedure

1. Go to *Admin Center* > *Pending Requests*.
2. Use the four portlets provided here to access workflows with pending requests:

| Portlet | Description | Possible Actions |
| --- | --- | --- |
| *Requests Waiting for My Approval* | This portlet lists all requests you need to approve at this moment. | Check details of a request and do one of the following:<br>• Delegate<br>• Withdraw<br>• Send back<br>• Approve |
| *Requests Still in Progress that I Approved* | This portlet lists all requests that you have already approved but are still waiting approvals from other people. | Check details of a request and do one of the following:<br>• Update<br>• Withdraw<br>• Resubmit |
| *My Requests Waiting for Approval* | This portlet lists all requests you have initiated that are waiting for approvals from others. | Check details of a request and do one of the following:<br>• Update<br>• Withdraw<br>• Resubmit |
| *My Notifications* | By default, this portlet lists all the notifications CC roles (when a workflow is completed) or contributors (when a workflow is pending) have received during the last month. You can configure it to show notifications received in the past three or six months. | View notifications or comment worklfows. |

**Task overview:** Accessing Workflows [page 163]

## Related Information

Accessing Workflows Using the Approve Requests Tile [page 164]
Accessing Workflows Using To-Do Alerts [page 165]
Accessing Pending Requests From Employee Quickcards [page 168]
Accessing Pending Workflow Requests in People Profile [page 169]
Accessing Pending Workflow Requests Using Mobile [page 171]
Accessing Workflow Requests on the Latest Home Page [page 173]

# 9.2.4 Accessing Pending Requests From Employee Quickcards

You can access your pending workflow requests from the employee *Quickcard* by selecting the *Pending Requests* link.

## Prerequisites

People Profile V3 enabled.

## Procedure

1. To access *Pending Requests* link from your own *Quickcard*, go to Action Search bar at the top of the page to enter your name.
2. Select your name and your employee QuickCards appears.
3. From your employee *Quickcard*, select *Take Action* menu so that all of your options appear.
4. Select the *Pending Requests* link.

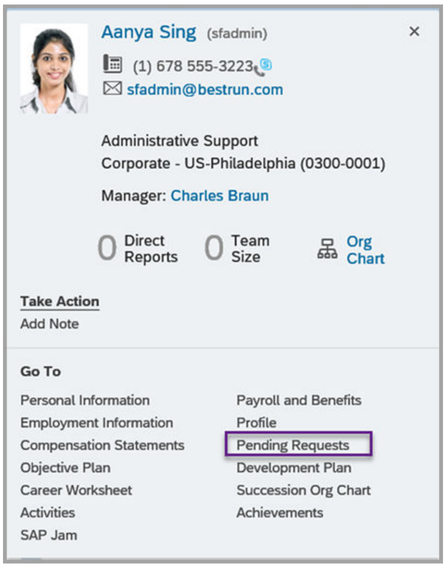



Figure 12: Screenshot of Employee QuickCards Where Pending Requests Link appears

When you select the *Pending Requests* link, you are directed to the *Pending Requests* page.

**Task overview:** Accessing Workflows [page 163]

## Related Information

Accessing Workflows Using the Approve Requests Tile [page 164]
Accessing Workflows Using To-Do Alerts [page 165]
Accessing Workflows Using the Pending Requests Tile [page 166]
Accessing Pending Workflow Requests in People Profile [page 169]
Accessing Pending Workflow Requests Using Mobile [page 171]
Accessing Workflow Requests on the Latest Home Page [page 173]

# 9.2.5 Accessing Pending Workflow Requests in People Profile

When there is a pending workflow for a subject user, you can access the workflow details page when you select the pending future link found in the subject users profile page. When you are the approver, you can approve the pending workflows directly.

## Procedure

1. Go to *Action Search* Bar to enter in the subject user name.

2. Select the person that you want.

   When you select the person you want, you are directed to their People Profile.
3. Locate the subject user's block that involves the change that triggers the pending workflow request.

> **Example**
>
> For Job Information change, go to that subject users *Job Information* or *Employment Information* block.

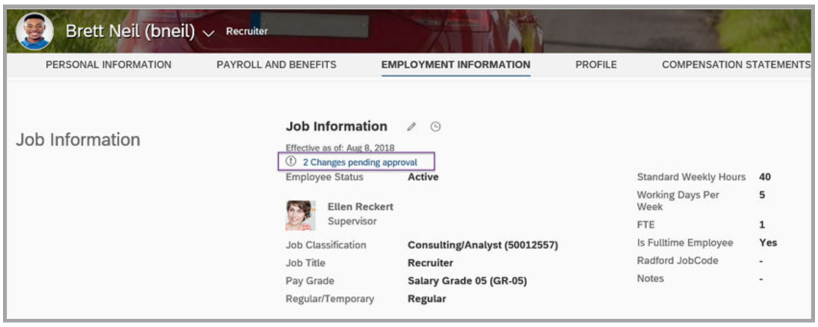



Figure 13: Screenshot of Changes Pending Approval in Subject Users People Profile

4. To access your pending requests, select the *changes pending approval* link.
5. Select the pending request that you want.

   When you select the pending request link, you are directed to the *Workflow Details* page for that request.

> **Note**
>
> Required permissions must be enabled when you are not the approver in order to view *Workflow Details* for that subject user.

**Task overview:** Accessing Workflows [page 163]

## Related Information

Accessing Workflows Using the Approve Requests Tile [page 164]
Accessing Workflows Using To-Do Alerts [page 165]
Accessing Workflows Using the Pending Requests Tile [page 166]
Accessing Pending Requests From Employee Quickcards [page 168]
Accessing Pending Workflow Requests Using Mobile [page 171]
Accessing Workflow Requests on the Latest Home Page [page 173]

# 9.2.6 Accessing Pending Workflow Requests Using Mobile

You can access your pending workflow requests using SAP SuccessFactors mobile application.

## Prerequisites

- SAP SuccessFactors is installed on your mobile device.
- And your company instance is configured for your mobile device.

## Procedure

1. To access your pending requests, launch your SAP SuccessFactors mobile application.
2. Find your pending workflow requests.
    - On iOS: Go to the *To-Do* tab at the bottom and locate the *Approve Requests* section.
    - On Android: Go to the home page and scroll to locate the *Approve Requests* section.

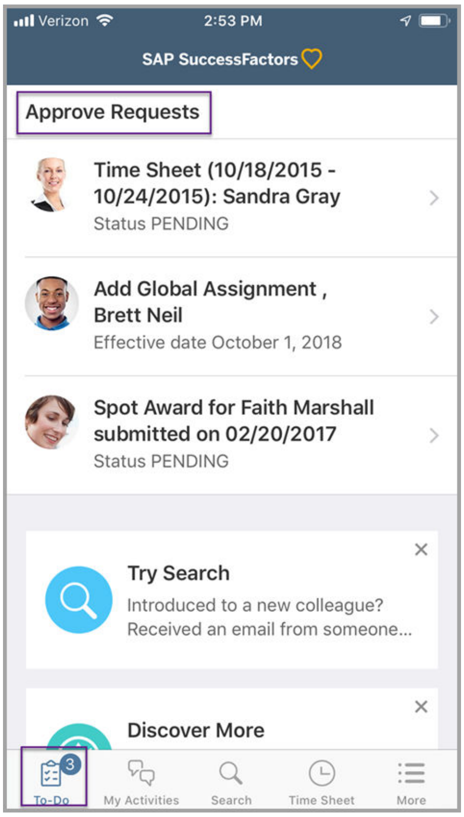
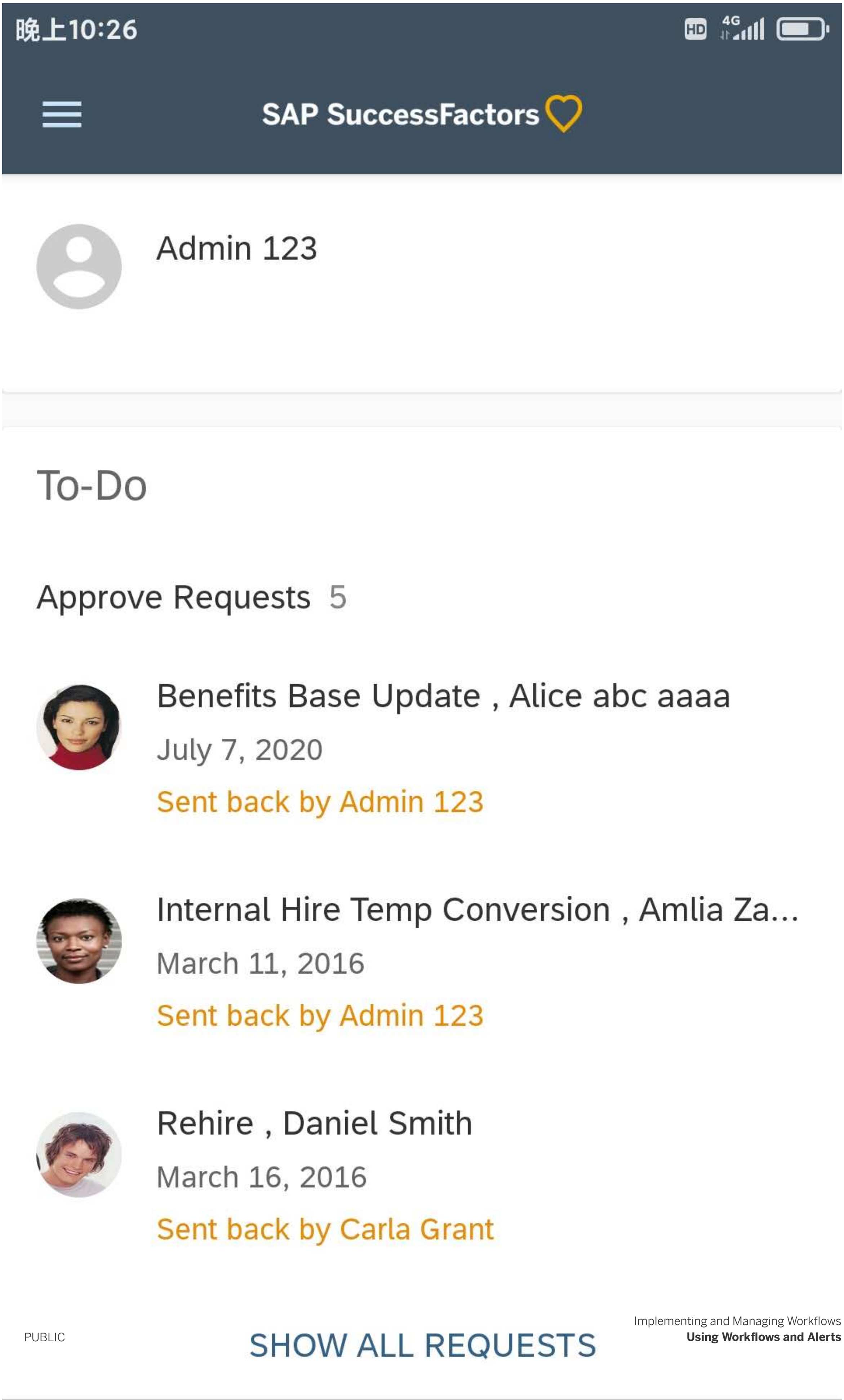



Figure 14: The *Approve Requests* Section Lists Your Pending Workflow Requests (iOS Version)



晚上10:26
SAP SuccessFactors
Admin 123
To-Do
Approve Requests 5
Benefits Base Update , Alice abc aaaa
July 7, 2020
Sent back by Admin 123
Internal Hire Temp Conversion , Amlia Za...
March 11, 2016
Sent back by Admin 123
Rehire , Daniel Smith
March 16, 2016
Sent back by Carla Grant
SHOW ALL REQUESTS

3. Tap any pending workflow request and respond to it.

**Task overview:** Accessing Workflows [page 163]

## Related Information

Accessing Workflows Using the Approve Requests Tile [page 164]
Accessing Workflows Using To-Do Alerts [page 165]
Accessing Workflows Using the Pending Requests Tile [page 166]
Accessing Pending Requests From Employee Quickcards [page 168]
Accessing Pending Workflow Requests in People Profile [page 169]
Accessing Workflow Requests on the Latest Home Page [page 173]

# 9.2.7 Accessing Workflow Requests on the Latest Home Page

Users can access pending and sent-back workflow requests directly from the latest home page.

## Prerequisites

The latest home page has been enabled.

## Context

Using cards in the *Approvals* section on the latest home page, users can approve pending Employee Central or MDF workflows. They can open a workflow details page to check the full details, or delegate, send back, or decline a workflow. If users aren't allowed to do quick approvals, they'll have to use the *View Details* link to open the workflow details page to approve the request. They can also view sent-back workflows on a different type of cards in the *For You Today* section. Choosing the *Review and Update* link opens a workflow details page, where they can make changes and resubmit the sent-back workflows.

## Procedure

1. Go to the latest home page of your SAP SuccessFactors.
2. Look for pending workflow requests in the *Approval* section or sent-back ones in *For You Today*.

### Results

Users can approve pending workflow requests directly from the cards if they're allowed to do quick approvals. Or, they can open a workflow details page to learn more and take further actions.

**Task overview:** Accessing Workflows [page 163]

### Related Information

Accessing Workflows Using the Approve Requests Tile [page 164]
Accessing Workflows Using To-Do Alerts [page 165]
Accessing Workflows Using the Pending Requests Tile [page 166]
Accessing Pending Requests From Employee Quickcards [page 168]
Accessing Pending Workflow Requests in People Profile [page 169]
Accessing Pending Workflow Requests Using Mobile [page 171]

# 9.3 Using My Workflow Requests Page

## 9.3.1 Sorting Workflows

You can use the sort button to sort all assigned workflow requests that appear in the *My Workflow Requests Page*.

### Using the Sort Option

The sort icon ↑↓ appears at the top of the *My Workflow Requests Page*. You can sort by selecting any of these options:

- *Received Date*
- *Intiated Date*
- *Effective Date*

When you select your date sort preference, you can, at the same time, sort your workflow requests in ascending or descending order by selecting the *Ascending* or *Descending* button.

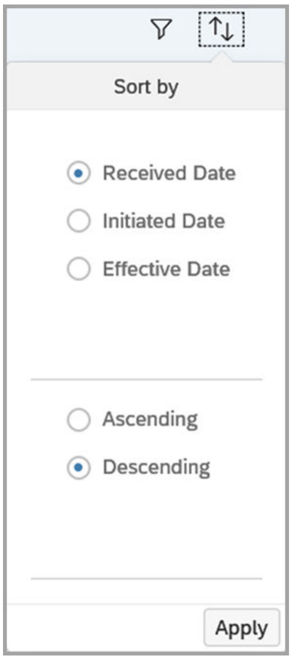



Figure 16: Screenshot of Workflow Request Sorting Options

## 9.3.2 Filtering Workflows From My Workflow Requests Page

You can filter workflows in the *My Workflow Requests* page (also known as "advanced to-do page") using specific criteria.

### Workflow Filtering From My Workflow Requests Page

You can enable filtering for assigned workflows when you select the filter  icon.

Filtering assigned workflows can help you view workflows within specific criteria, such as workflows assigned to a specific employee, by workflow request type, or who it was requested for. This can help ease the amount of time it takes to view your workflow requests especially when you have a high number of requests.

By default, without more role-based permissions, are the filters you can use:

- *Request Type*
- *Event Reason*
- *Requested For*
- *Effective Date Range*
- *Initiated By*
- *Initiated Date Range*

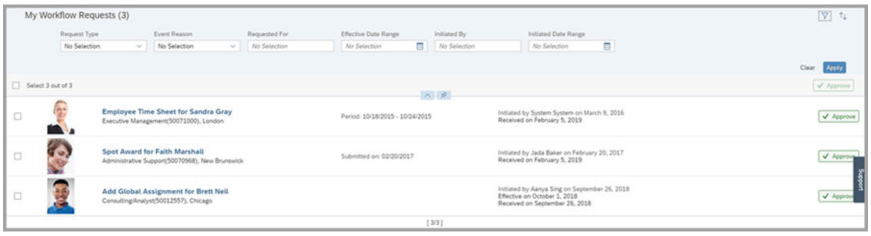


Figure 17: Screenshot of Available Default Filters In *My Workflow Requests* page.

### 9.3.3 Filtering Workflows When Professional Edition Manage Workflows is Enabled

You can filter workflows in the *My Workflow Requests*

#### Filtering Workflows When *Professional Edition Manage Workflow Requests* Enabled

Since you can see more data when *Professional Edition Manage Workflow Requests* is enabled, the same is true for filters. Here are the additional filters:

- *Company*
- *Location*
- *Cost Center*
- *Business Unit*
- *Division*
- *Department*

> ⚠ Caution
>
> You cannot use these filters for *Hire* and *Rehire* workflows since they are not in the system yet. However you may be able to filter for *Hire* and *Rehire* workflows using other filters, such as *Event Reason*.

> ⚠ Caution
>
> The additional filters are applicable towards person-based workflows only.

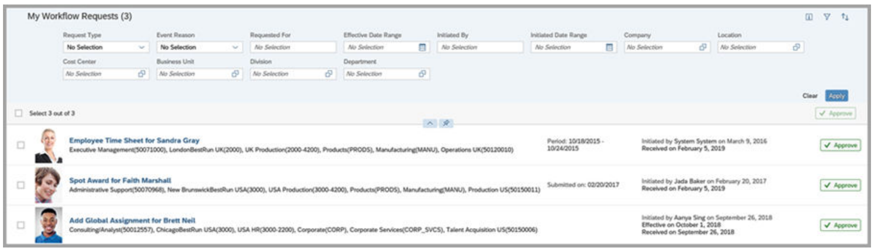


Figure 18: Screenshot of all Available Filters when *Professional Edition Manage Workflow Requests* Enabled

# 9.3.4 Filtering Workflows When Manage Workflow Assignments is Enabled

You can filter workflows in the *My Workflow Requests* page by assigned workflows when *Manage Workflow Assignments* is enabled in role-based permission.

## Filtering Assigned Workflows

The *Assignment* filter has the following options available:

- *Unassigned*
- *Assigned to me*
- *Assigned to others*
- *Assigned to*

> **Note**
>
> When you select the *Assigned to* filter, another field with the same name appears next to it. The new field is a search text field that allows you to enter the first two letters of the individual assignee name so that you can select from a list.

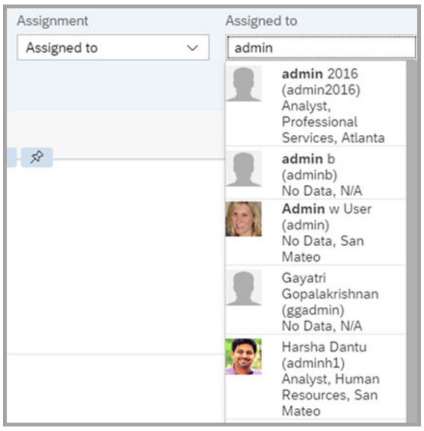



Figure 19:

## 9.3.5 Detailed Information About Filtering

There are a number of ways you can filter assigned workflows by selecting a number of different fields. The table in this topic gives detailed information about all available filters.

Table 12: More Information About Filters By Assignment

| Filter Field Name | Additional Role-based Permissions Required | *Description* |
|---|---|---|
| *Request Type* | None | You can select the workflow request type you want to filter from the drop-down menu.<br><br>**i Note**<br>Applicable towards person-based workflows only. |
| *Event Reason* | None | You can select the event reason you want to filter from the dropdown menu. |
| *Requested For* | None | You can filter workflow requests by entering in the first two letters of the subject users name that opens up a list of names. Select the individual you want. |
| *Effective Date Range* | None | You can filter workflow requests by effective date range using the date picker. |
| *Initiated By* | None | You can filter workflow requests by entering in the first two letters of the initiators name that opens up a list of names. Select the individual you want. |
| *Initiated Date Range* | None | You can filter workflow requests by the initiated date range using the date picker. |
| *Company* | *Professional Edition Manage Workflow Requests* | You can search and select multiple companies with this filter. |
| *Location* | *Professional Edition Manage Workflow Requests* | You can search and select multiple locations with this filter.<br><br>**i Note**<br>Applicable towards person-based workflows only. |

| Filter Field Name | Additional Role-based Permissions Required | *Description* |
|---|---|---|
| *Cost Center* | *Professional Edition Manage Workflow Requests* | You can search and select multiple locations with this filter.<br><br>i Note<br><br>Applicable towards person-based workflows only. |
| *Business Unit* | *Professional Edition Manage Workflow Requests* | You can search for and select multiple business units.<br><br>i Note<br><br>Applicable towards person-based workflows only. |
| *Division* | *Professional Edition Manage Workflow Requests* | You can search for and select multiple divisions.<br><br>i Note<br><br>Applicable towards person-based workflows only. |
| *Department* | *Professional Edition Manage Workflow Requests* | You can search for and select multiple departments.<br><br>i Note<br><br>Applicable towards person-based workflows only. |

| Filter Field Name | Additional Role-based Permissions Required | *Description* |
|---|---|---|
| *Assignment* | *Manage Workflow Assignments* | You can filter workflow requests by assignment from a dropdown menu These are the available choices:<br>• Unassigned<br>• Assigned to me<br>• Assigned to others<br>• Assigned to<br><br>**i Note**<br>When you select the *Assigned to* filter, the *Assigned to* field appears. The *Assigned to* is a search text field that allows you to enter the first two letters of the individual assignee name so that you can select from a menu. |

## 9.4 Assigning Workflows to Yourself

A workflow can be sent to multiple approvers, for example, when the specified approver is a dynamic group or dynamic role. As one of the approvers, to avoid redundant approvals, you can assign it to yourself and indicate to other approvers that you're working on it.

### Prerequisites

You have the *Manage Workflow Assignments* permission.

### Context

The feature is available for all workflows **except** those whose approver types are described below:

- Approver type is `Role`, and the corresponding approver role is `Self`, `Manager`, `Manager Manager`, or `Employee HR`.
- Approver type is `Dynamic Role`, and the resolved approver of a selected dynamic role is an individual person.

You can reserve workflows on the *My Workflow Requests* page or the *Workflow Details* page through the Web application. Note that it is not supported through the mobile app or API calls.

## Procedure

1. Go to *Home Page* > *Approve Requests* to open the *My Workflow Requests* page. You can also navigate to the detail page of a workflow to access the feature.
2. Click *Assign To Me* to reserve the workflow to yourself.

## Results

The workflow is flagged as assigned to yourself and other approvers of this workflow can also see the flag. If you want to undo the assignment, choose *Remove Assignment*. The assignment can also be removed by other approvers of this workflow if they want to process the workflow themselves.

# 9.5 Managing Workflow Assignments

You can now reserve workflows using *Manage Workflow Assignment* and flag your workflows, so other won't work on them when you're in charge.

## Managing Workflow Assignments

As an approver, you can reserve workflows to avoid the potential of multiple approvers processing the same workflow at the same time once you select the *Assign To Me* button. When you reserve the workflow, it is flagged to other approvers.

The feature is available for all workflows **except** those whose approver types are described below:

- Approver type is `Role`, and the corresponding approver role is `Self`, `Manager`, `Manager Manager`, or `Employee HR`.
- Approver type is `Dynamic Role`, and the resolved approver of a selected dynamic role is an individual person.

You can reserve workflows on the *My Workflow Requests* page or the *Workflow Details* page through the Web application. Note that it is not supported through the mobile app or API calls.

> **! Restriction**
>
> The *Assign To Me* button appears on the *My Workflow Requests* page when *Manage Workflow Assignments* role-based permission is enabled. To see this button on the *Workflow Details*, the permission is also necessary.

> **Note**
>
> The *Manage Workflow Assignment* feature isn't supported for mobile or OData features.

1. Role-based Permissions for Managing Workflow Assignments [page 182]
   You can enable administrators, approvers, and managers the ability to use the *Assign To Me* feature to specific permission roles.
2. Using Assign To Me in Workflows [page 183]
   As an approver, you can assign workflows to yourself or to another individual so that other approvers know that this request is being worked on by someone else.

## 9.5.1 Role-based Permissions for Managing Workflow Assignments

You can enable administrators, approvers, and managers the ability to use the *Assign To Me* feature to specific permission roles.

### Procedure

1. To set up your target permissions, go to *Admin Center* > *Manage Permission Roles*.

   You are directed to the *Permission Role List* page.
2. Select the *Permission Role* you want.

   When you select your permission role, you are directed to the *Permission Role Detail* page.
3. Go to *Permission...* > *Administrator Permissions* > *Manage Workflows* to select *Manage Workflow Assignment*.
4. Select *Done* to save and exit to the *Permission Role Detail* page.
5. To save and finish, select *Save Changes*.

**Task overview:** Managing Workflow Assignments [page 181]

**Next task:** Using Assign To Me in Workflows [page 183]

## 9.5.2 Using Assign To Me in Workflows

As an approver, you can assign workflows to yourself or to another individual so that other approvers know that this request is being worked on by someone else.

### Prerequisites

You've enabled the role-based permission *Manage Workflow Assignment*.

**Task overview:** Managing Workflow Assignments [page 181]

**Previous task:** Role-based Permissions for Managing Workflow Assignments [page 182]

### 9.5.2.1 Reserving Workflows From My Workflow Requests Page

You can reserve your workflow by selecting the *Assign To Me* from the *My Workflow Request* screen.

### Prerequisites

- *Professional Edition Manage Workflow Requests* role-based permission is required if managing workflow requests from *My Workflow Request* screen.

### Procedure

1. Go to *My Homepage* > *Approve Requests* that opens up the *My Workflow Requests* page.
2. To reserve, select the *Assign To me* button at the same line as your request that you want.


Figure 20: Screenshot of *Assign To Me* in the *My Workflow Request* page

When you have selected the *Assign To Me* button:

- **This workflow request is now assigned to me** message appears in a small dialog box.

- Flag appears next to the workflow link that contains tooltip that reads **Assigned to me**.

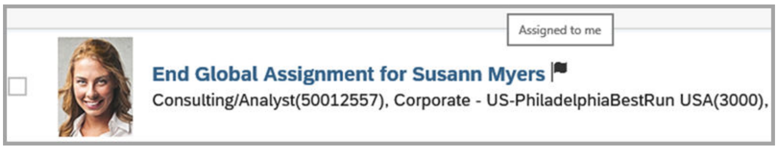



Figure 21: Screenshot of Flag that appears Next to the Workflow Link That Includes Tooltip

## 9.5.2.2 Reserving Workflows From My Workflow Details Page

You can reserve workflows for yourself to process later so others don't need to.

### Procedure

1. To access *Workflow Details* one of two ways:
   - Go *My Homepage* > *Approve Requests Tile* and select the workflow link at the top of *My Workflow Requests* page.
   - Go to *My Homepage* > *My Pending Requests Tile* that takes you to the *Pending Requests* page. Select the request you want from the *Requests Waiting for My Approval* section.

   You are directed to the *Workflow Details* page.

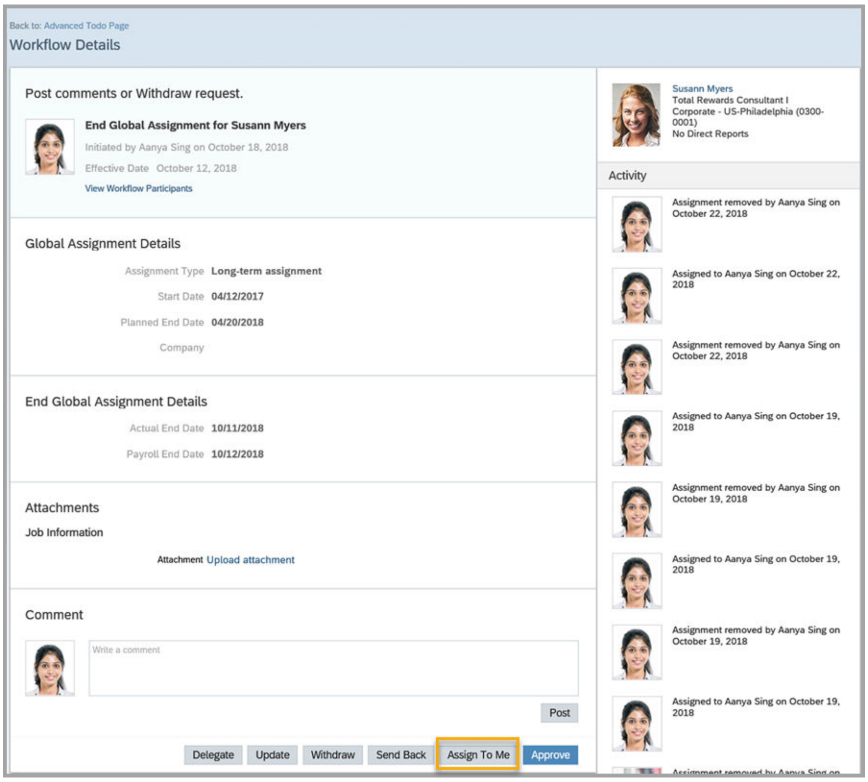



Figure 22:

2. To reserve and finish, select the *Assign To Me* button.

   When you select *Assign To Me*, a dialog box message that reads **This workflow request is now assigned to me.** appears. The *Assigned to me* flag appears at the top of the workflow request.


Figure 23:

## 9.5.2.3 Removing Workflow Assignments for Workflows Reserved by me

If you've assigned a workflow to yourself, you can nevertheless unassign it so others can work on it again.

### Procedure

Access the *Workflow Details* page in one of the two ways:

- Go *Homepage* > *Approve Requests* and select the workflow link at the top of *My Workflow Requests* page.
- Go to *Homepage* > *My Pending Requests* that takes you to the *Pending Requests* page. Select the request you want from the *Requests Waiting for My Approval* section.

You are directed to the *Workflow Details* page that shows an *Assigned to me* label at the top of the page and a *Remove Assignment* button at the bottom of the page.

> **Note**
>
> When you are the same individual that reserved the workflow, the *Assigned to me* label with a flag icon appears at the top of the workflow.

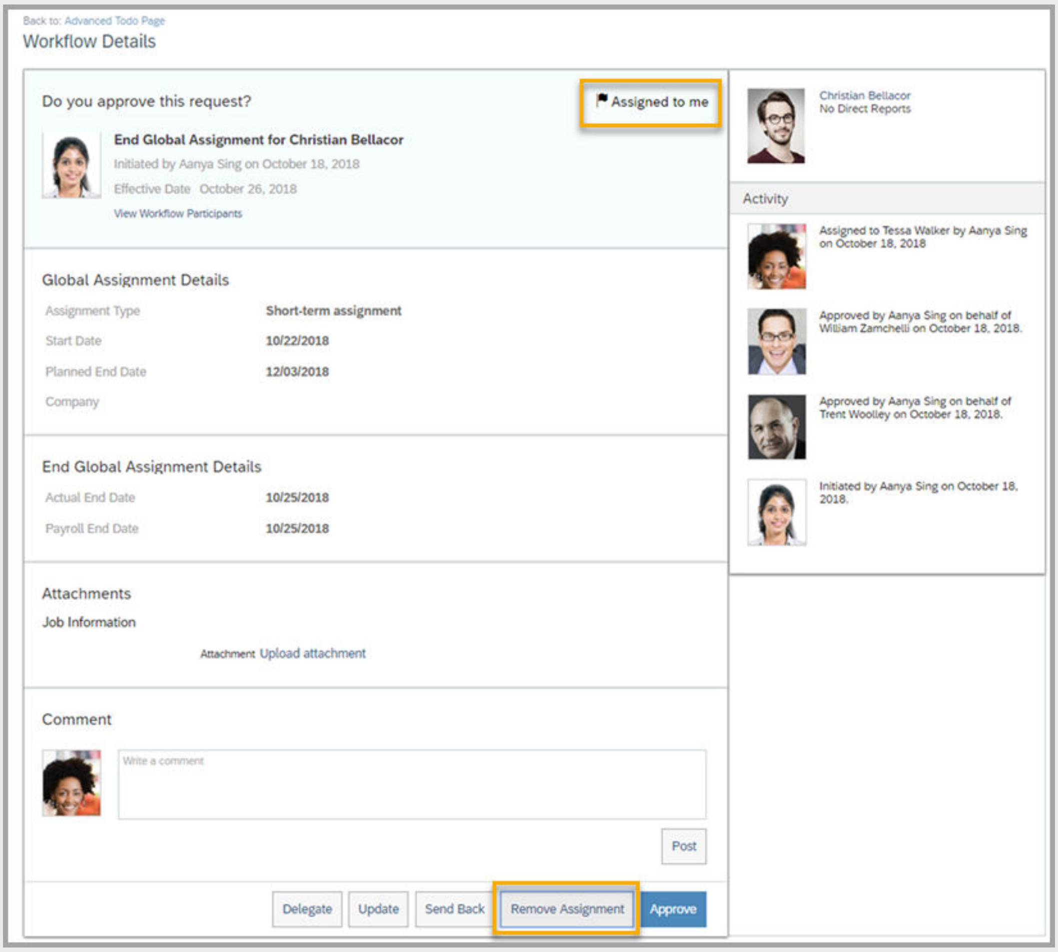



Figure 24: Screenshot of The **Remove Assignment** Button at The Bottom of The Workflow Details Page

## 9.5.2.4 Removing Workflow Assignments for Workflows Reserved by Someone Else

If you're one of the approvers of a particular step, you can unassign the workflow that's already been assigned to another approver of this step. As a result, other approvers of this step can work on the workflow.

### Prerequisites

Only approvers of the same step that belong in the same *Dynamic Role* or *Dynamic Group* can remove a workflow assignment that's reserved by someone in the same dynamic group or role.

## Procedure

Access *Workflow Details* in one of the two ways:

- Go *Homepage* > *Approve Requests* and select the workflow link at the top of *My Workflow Requests* page.
- Go to *Homepage* > *My Pending Requests* that takes you to the *Pending Requests* page. Select the request you want from the *Requests Waiting for My Approval* section.

You are directed to the *Workflow Details* page that shows a *Remove Assignment* button at the bottom of the page. The "Assigned to {user name}" label with a lock icon appears at the top of the page, indicating to whom the workflow was assigned.

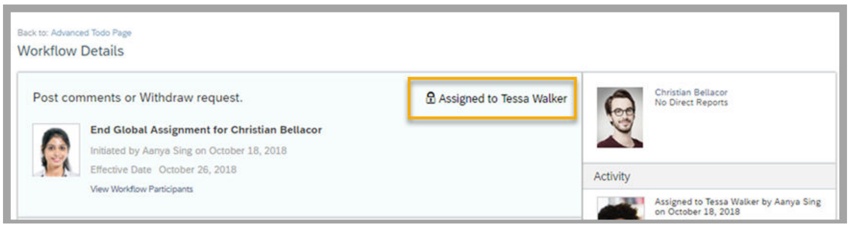


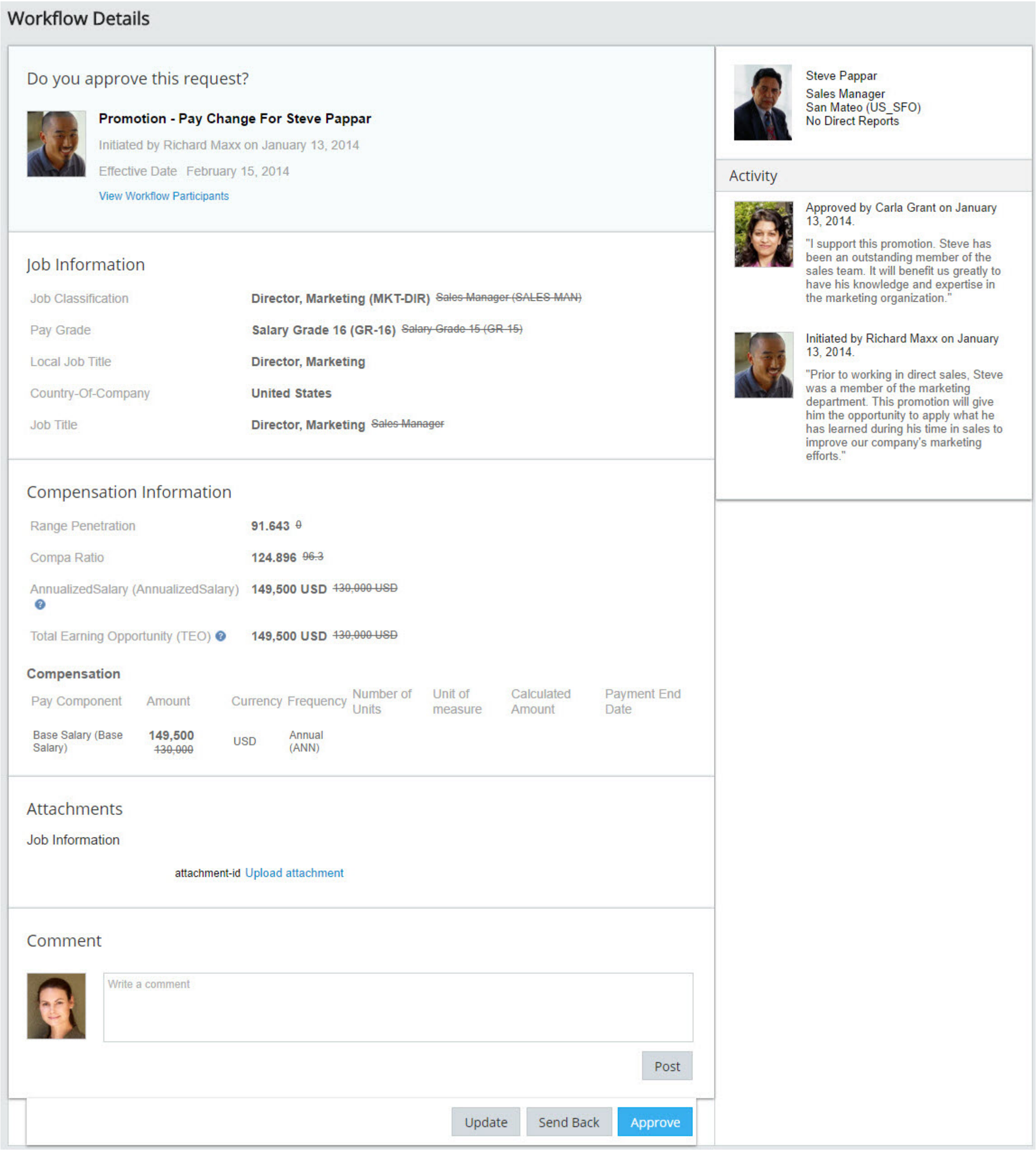

Figure 25: Screenshot Of Lock Icon With Assigned Individuals Name in Tooltip

# 9.6 Acting on Workflows

This section explains what the workflow looks like on the UI and what you can do with it.

An example of a standard workflow includes the type of request, the relevant data, a comment area, and an activity list for the request.

> → Tip
>
> Types of information shown on the activity list are hardcoded and these include workflow actions, comments, links (such as Show Previous Request) etc. There's no permission that allows you to hide any of them.

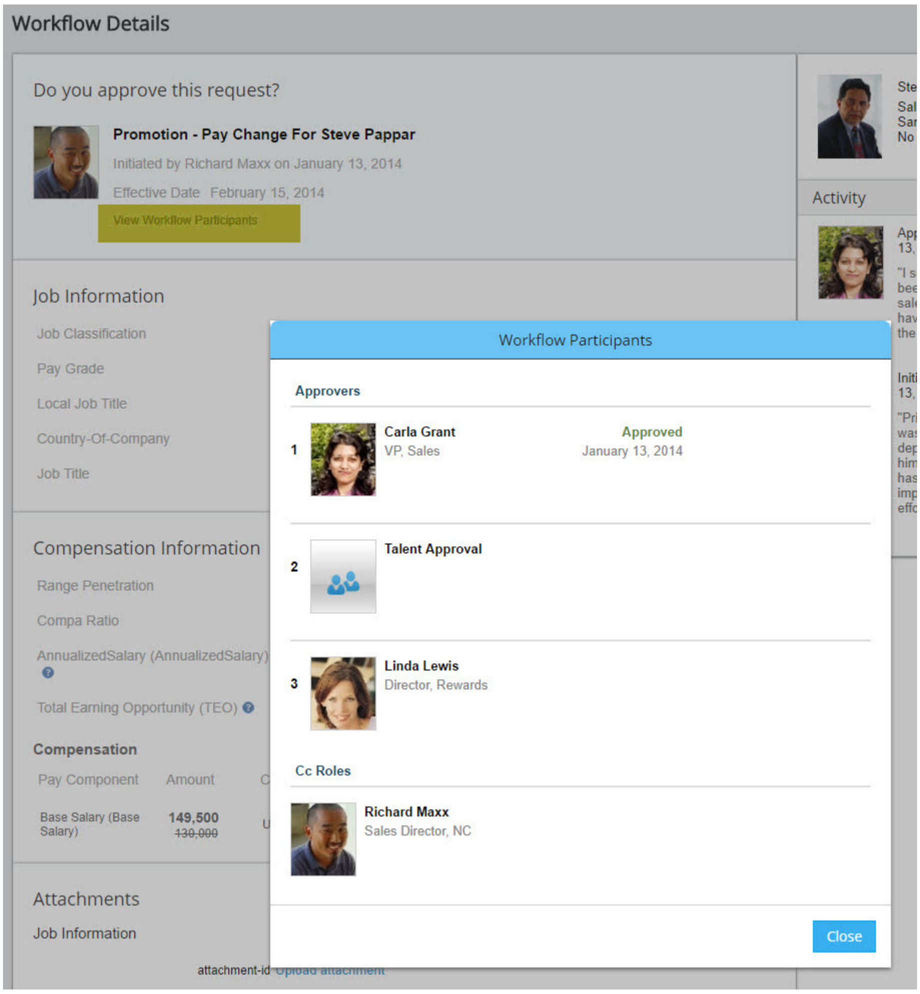



Within the header portlet you can see who has initiated a change for whom.

Within the Activity box adjacent to the workflow box, you can find previously posted comments as well as processing information.

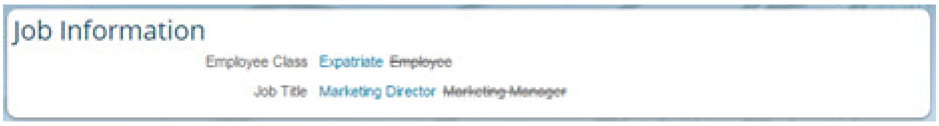
> → Tip
>
> If it's an MDF workflow, you can use the *Manage Configuration UI* tool to customize the basic layout of workflow details.

You can see who else is involved in the workflow by clicking on *View Workflow Participants*. This opens a pop-up with a list of the people involved in the workflow:




We show the group or position name if there are more than 4 incumbents for dynamic group, position or position relationships, as in the example for Talent Approval. If a dynamic group, position or position relationship has 4 or fewer incumbents, then the system shows the incumbents instead of the group or position name.

The next portlet shows what has been changed or requested. Changes list both the new value and the old value, with the previous value crossed out.



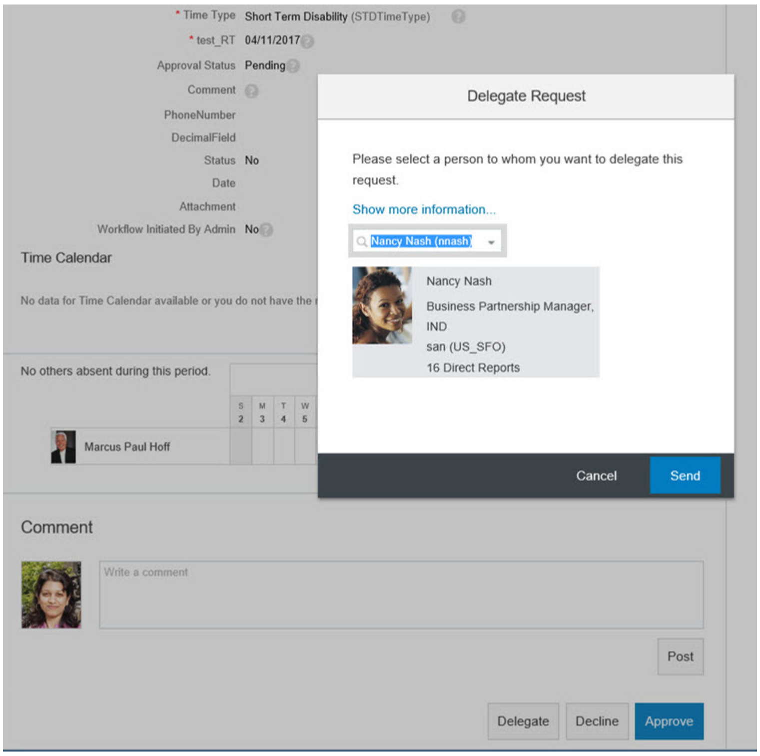

The last portlets have the actions that are possible for this workflow.

## Actions

- **Approve**
  You can accept the request by clicking *Approve*.
- **Send Back/Decline**
  If you do not accept the request and therefore either sends it back or declines it, depending on the workflow type. Requests that are sent back can be either withdrawn or updated and resubmitted by the initiator. For declined requests, no further processing is possible, for example, for time off requests.
- **Comment**
  The initiator of a workflow or a contributor can add a comment for the workflow; approvers can add a comment as well as approve, decline, or delegate the workflow; CC roles can't add any comment. The comments are visible within the activity log of the workflow.
- **Update**
  When you click *Update*, you access the source of the workflow to make a change. Depending on the company settings, the system may react as follows:
  - Edit with Route Change
    This option gives the approver permission to modify the workflow transaction. After the changes are made, the transaction will be re-evaluated and a new workflow automatically triggered. This can be the same workflow, but based on the given changes, this can also result in a different workflow.
  - Edit without Route Change
    Similar to the above, the approver can make changes. However, the workflow then continues to the next step and there is no new workflow.
  - Upload Attachments
    If you click *Upload attachment*, you can assign a document to the workflow object.
- **Resubmit/Withdraw**
  For workflows that are sent back, the workflow initiator can react to a returned workflow request by either changing and resubmitting or by withdrawing the request.
  For workflows of this type, the initiator can resubmit and withdraw requests at any time during workflow processing – no return is required.
- **Cancel**
  Certain workflow types, for example for time off or time sheet, can be canceled by the initiator at any time.
- **Delegate**
  The current approver can manually delegate a workflow to somebody who is in a better position to decide on a workflow.

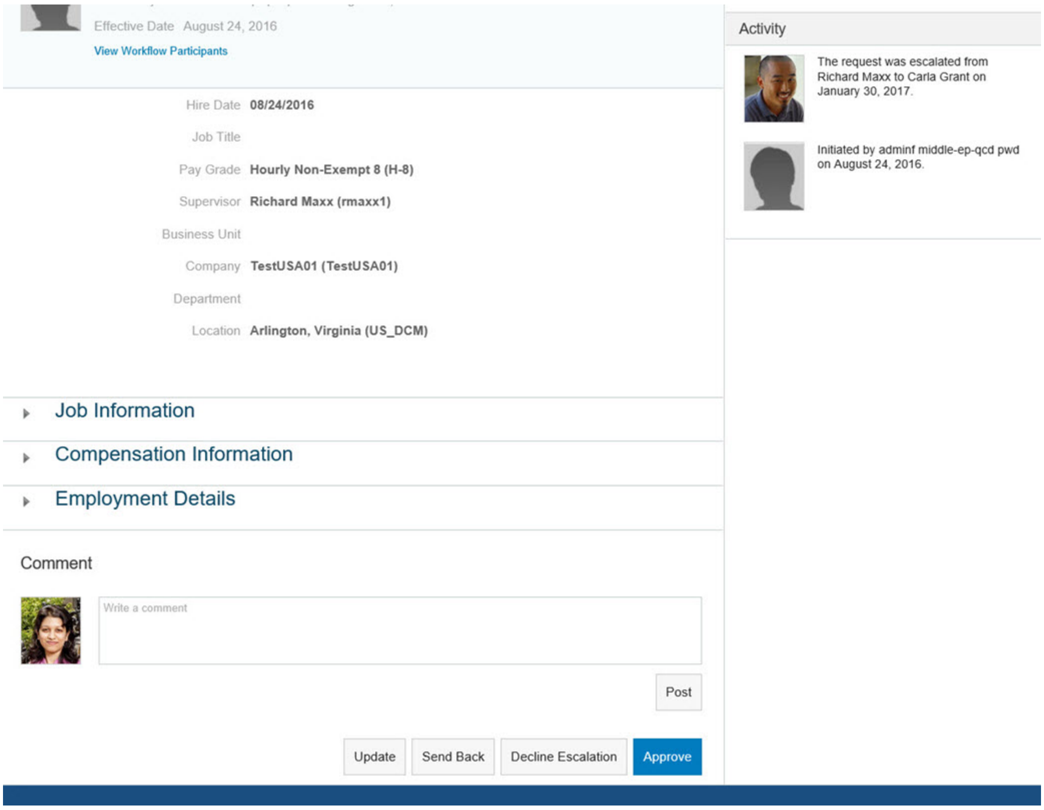
  > **i Note**
  >
  > This option is available within a workflow only if *Delegation* is enabled in the workflow definition.

  Once you click *Delegate*, you can search for and assign the delegate.




The delegate can either decide on the request (Approve or Decline) or Decline the delegation. If the delegate declines the delegation, the workflow is sent back to the previous approver and the request initiator is notified.

- **Escalated Workflows and Decline Escalation**
  If there is an escalation path defined for a workflow and a workflow is stalled for the defined days, the workflow is automatically escalated along that defined path. The user can directly see that the workflow was escalated in the *Activity History*:




If you decide to select *Decline Escalation*, the workflow will be sent back to the previous approver and the workflow initiator is notified by email.

## 9.7 Delegating Workflows

You can delegate someone else to act on your behalf and take care of your workflow when you're on vacation or when you think someone else might be better suited to approve specific workflows.

Only workflow foundation objects whose *Is Delegate Supported* attribute has been set to *Yes* can be delegated. You can either delegate individual workflows manually in the *Workflow Details* page or enable automatic delegation for all your workflows during a specified period. Delegation requests can be accepted or rejected.

Delegating Individual Workflows Manually [page 194]
Sometimes you might think someone else is in a better position to handle specific workflows than you are. You can then choose to delegate those workflows to that person.

Automatic Delegation [page 194]
Workflow automatic delegation ("auto-delegation") offers a more convenient way to delegate workflows than the manual approach. Employees can select a specific delegatee to approve all their workflows during a specified period, or their HR admin can configure automatic delegation for them instead.

Delegate Search for Employees on Global Assignment or Concurrent Employment [page 201]
When you search for someone to delegate your workflows to, any employee who is on *Global Assignment* or *Concurrent Employment* will appear as one entry.

## 9.7.1 Delegating Individual Workflows Manually

Sometimes you might think someone else is in a better position to handle specific workflows than you are. You can then choose to delegate those workflows to that person.

### Prerequisites

The *Is Delegate Supported* attribute of the workflow is to *Yes* on the workflow configuration page.

You have the *User Search* permission, which allows you to search for a delegatee among users within the target population of your permission.

### Procedure

1. Navigate to the workflow details page of a workflow request.
2. Choose *Delegate*.
3. Search for a person to delegate your workflows to, by entering initial letters of that person's name.

### Results

The workflow request is sent to the person you chose and the initiator of the workflow is also informed of the delegation. The request receive can decide whether to send back or approve the involved workflow, or decline the delegation request directly.

## 9.7.2 Automatic Delegation

Workflow automatic delegation ("auto-delegation") offers a more convenient way to delegate workflows than the manual approach. Employees can select a specific delegatee to approve all their workflows during a specified period, or their HR admin can configure automatic delegation for them instead.

### Related Information

Delegating Individual Workflows Manually [page 194]

## 9.7.2.1 Permissions for Automatic Delegation

Administrators must grant delegators and delegatees proper permissions for auto-delegation to work properly.

Normally, you only need to ensure your employees have the following permissions:

- In case of the legacy home page: both delegators and delegatees have the *Allow Auto Delegation* permission.
- In case of the latest home page: delegators have the *Allow Auto Delegation* permission; delegatees don't need any permission.

> **i Note**
>
> Without the *Allow Auto Delegation* permission, users won't see the *Delegate Workflows* tile in the *Quick Actions* section.

So, there's no need to configure the Auto Delegate Config object or the Auto Delegate Detail object using the *Configure Object Definitions* tool for the purposes of auto-delegation. But if you choose to configure them for whatever reasons, be sure you're aware of and follow the instructions here:

- The *Pending Data* field in the configuration page has "No" as the default value and doesn't take other values. Assigning any other value to it causes an error when you save the object. This is to ensure that MDF object based workflows aren't triggered unexpectedly.
- The default value for *Secured* is "No". When the value is "No", make sure that you've been granted the *Metadata Framework* > *Access to non-secured objects* permission. If you set it to "Yes", you need to choose `MDF Foundation Objects` in *Permission Category* and enter `delegator` in *RBP Subject User Field* before saving the object definition. After that, you need to define the *Auto Delegate Config* and *Auto Delegate Details* permissions (under *MDF Foundation Objects*) as illustrated by the following example:

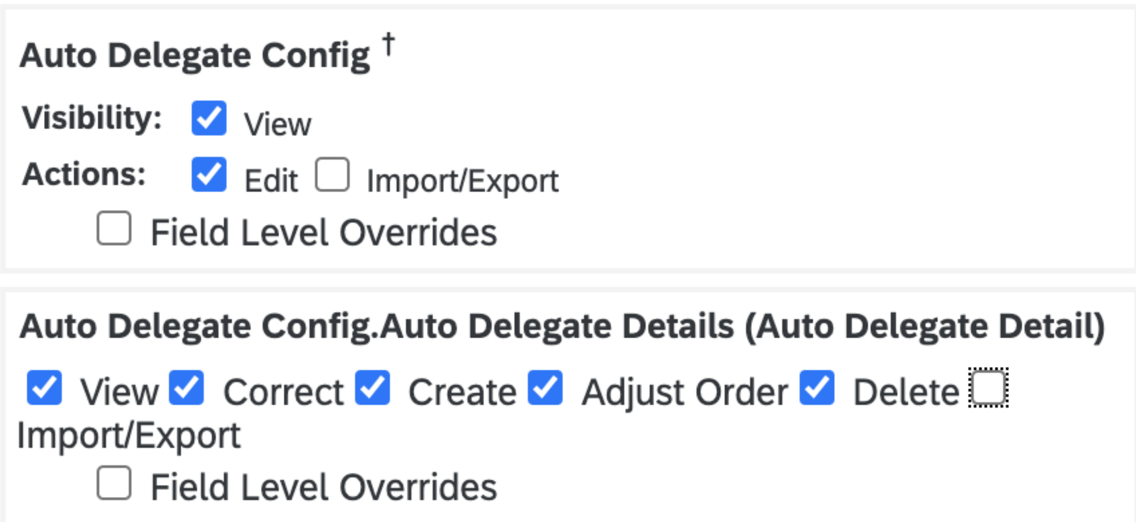



Figure 26: Define Permissions

Finally, grant the permissions to one delegation role, in addition to the permission that role already has (as described earlier):

- To delegatee, in case of the legacy home page. Ensure that the delegatee is included in the *Permission Groups or Users* column and the delegator is in *Target Population*.

- To delegator, in case of the latest home page. Ensure that the delegator is in *Target Population* and the option *Exclude granted users from having the permission access to themselves* in the *Grant this role to* dialog is **not** selected.

## 9.7.2.2 Setting Up Automatic Workflow Delegation (for Employees)

By properly configuring automatic workflow delegation, employees can have someone else to act on their behalf and handle all their workflows during the period when they're unavailable.

### Prerequisites

- The *Is Delegate Supported* attribute of the concerned workflow has been set to *Yes*.
- You have the *Allow Auto Delegation* permission.
- You have the *User Search* permission, which allows you to search for a delegatee among users within the target population of your permission.

### Context

You can access the feature of setting up auto-delegation from the legacy home page, but it's more readily available on the latest home page through a *Quick Action* tile.

### Procedure

1. Enter the feature UI.
    - For users of the legacy home page: Go to *Home Page* > *Quick Links* > *Available* > *Auto Delegate*. In case you don't see the *Quick Links* tile: on the avatar menu, choose *Personalize Homepage* and then select the tile to make it visible on the home page.
    - For users of the latest home page: Choose *Delegate Workflows* in the *Quick Action* section.
2. In that UI, turn on automatic delegation.
3. Specify the period during which your workflows are automatically delegated.

    For users of the legacy home page, both the start time and the end time are defined based on the time zone of the delegator (you) in the application; for users of the latest home page, these time parameters are based on the time zone of the delegator's web browser. You can leave the start time and end time settings empty and they'll work as follows:
    - Empty start time: The auto-delegation will become effective immediately after the delegation request is accepted (if the delegatee is allowed to accept or reject a request), or after the configuration is saved (if the delegatee isn't allowed to accept or reject).

    - Empty end time: The auto delegation will remain effective until it's manually turned off.
4. Search for a person to delegate your workflows to, by entering the first letters of that person's name.
5. Save the auto delegation configuration.

## Results

Depending on whether your HR admin has enabled the option *Allow Delegatees to Accept or Reject a Workflow Delegation Request* at *Admin Center* > *Company System and Logo Settings*, you can expect either of the following scenarios:

- If not enabled: No delegation request is sent to your chosen delegatee. Your workflows are automatically delegated to the selected delegatee from the start time of your configured delegation. If the delegatee is using the latest home page, they'll see an *Upcoming Delegation* reminder in the *For You Today* section, which keeps them notified of an ongoing or upcoming delegation.
- If enabled: The delegatee will see a delegation request and can respond to it, at either of the following places.
    - On the legacy home page: *Home Page* > *Quick Links* > *Available* > *Auto Delegate* > *Workflow Auto Delegation* > *Delegation Requests for Me*.
    - On the latest home page: *Workflow Delegation Request* card in the *For You Today* section.

And as the delegator, you can always update your delegation configuration by modifying the period, changing the delegatee, or even turning off auto delegation.

## Related Information

Setting Up Automatic Workflow Delegation (for HR Admin) [page 198]
Accepting or Rejecting Delegation Requests from the Legacy Home Page [page 199]
Accepting or Rejecting Delegation Requests from the Latest Home Page [page 200]
Permissions for Automatic Delegation [page 195]

# 9.7.2.3 Setting Up Automatic Workflow Delegation (for HR Admin)

When employees are on vacation or otherwise unavailable for setting up their own automatic workflow delegation, their HR admin can do it on their behalf.

## Procedure

1. Go to *Admin Center* > *Manage Data*.
2. Enter "Auto Delegate Config" in the *Create New* field to start creating a new instance of the object.
3. Search for the delegator for whom you want to set up automatic workflow delegation.
4. Specify the start time and end time of the auto delegation period.
   Both the start time and the end time are defined based on the time zone of the delegator's computer system, not that of the delegatee. You can leave the start time and end time settings empty and they'll work as follows:
   - Empty start time: The auto-delegation will become effective immediately after the delegation request is accepted (if the delegatee is allowed to accept or reject a request), or after the configuration is saved (if the delegatee isn't allowed to accept or reject).
   - Empty end time: The auto delegation will remain effective until it's manually turned off.
5. Ensure *delegationStatus* is set to *On*.
6. Specify the delegatee's user name, choose "On" as the status, and set *alwaysOn* to *Yes*.
7. Save the delegation configuration.

## Results

The chosen delegatee is asked to approve the delegator's workflows during the period. After that period, the auto delegation feature will be turned off automatically.

## Related Information

Setting Up Automatic Workflow Delegation (for Employees) [page 196]
Accepting or Rejecting Delegation Requests from the Legacy Home Page [page 199]

## 9.7.2.4 Accepting or Rejecting Delegation Requests from the Legacy Home Page

Employees can view delegation requests they've received and decide how they want to respond to each of them.

### Prerequisites

- This option has been enabled at *Admin Center* > *Company System and Logo Settings* : *Allow Delegatees to Accept or Reject a Workflow Delegation Request*.
- They have the *Allow Auto Delegation* permission.

### Procedure

1. In the legacy home page, go to *Quick Links* > *Available* > *Auto Delegate* > *Delegation Requests for Me* .

   → Tip

   When someone requests you to act on their behalf to approve workflows, you'll also receive a notification email, in addition to seeing such request on the *Auto Delegate* UI.
2. Choose an action-awaiting delegation request and accept or reject it.

### Results

After you've responded to a delegation request, the delegator receives email notifications; the request status is also indicated in the *Delegation Configuration* tab; and if you've chosen to accept it, the delegator's workflows will be delegated to you afterwards.

> **i Note**
>
> Emails are sent when there's an update to a workflow auto-delegation request, for example when it's sent, accepted, rejected, or withdrawn. Such emails are hardcoded and users cannot customize the text, language, or layout.

### Related Information

Setting Up Automatic Workflow Delegation (for Employees) [page 196]
Setting Up Automatic Workflow Delegation (for HR Admin) [page 198]

## 9.7.2.5 Accepting or Rejecting Delegation Requests from the Latest Home Page

Directly from the latest home page, users can view and respond to delegation requests they've received.

### Prerequisites

- The latest home page has been enabled.
- The option *Allow Delegatees to Accept or Reject a Workflow Delegation Request* in *Admin Center* > *Company System and Logo Settings* is selected.

### Context

If the option *Allow Delegatees to Accept or Reject a Workflow Delegation Request* is selected, users will see a *Workflow Delegation Request* card that appears in the *For You Today* section of the latest home page when such a request has been sent to them. They can use this card to accept or reject an auto-delegation request. If the option is deselected, the requests are accepted automatically and users don't see such cards on the latest home page.

### Procedure

1. Go to the latest home page of your SAP SuccessFactors.
2. Look for *Workflow Delegation Request* cards in the *For You Today* section.
3. Choose *Accept* or *Reject* on a card to respond to the request.

### Results

If a delegation request has been accepted, either manually or automatically, the user chosen as delegatee will be reminded by an *Upcoming Delegation* card of an ongoing or upcoming delegation. Such reminders can be dismissed for a short period or permanently.

## 9.7.3 Delegate Search for Employees on Global Assignment or Concurrent Employment

When you search for someone to delegate your workflows to, any employee who is on *Global Assignment* or *Concurrent Employment* will appear as one entry.

### Delegation

For both manual and auto delegation, when you search for a new delegate, any employees that come up in your search that are on *Global Assignment* or *Concurrent Employment* appear as single employee record instead of multiple.

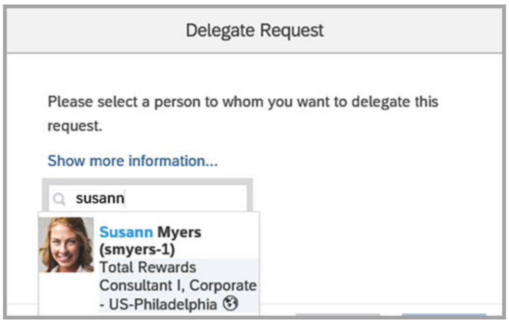



Figure 27: Screenshot of Delegate that is on Global Assignment for Manual Delegation

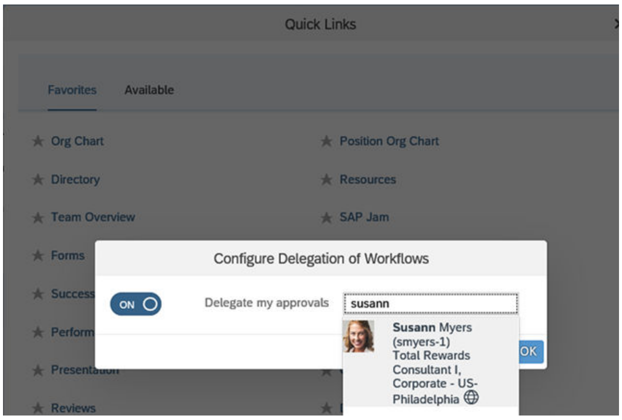



Figure 28: Screenshot of Delegate that is on Global Assignment for Auto Delegation

### Individual Employment Selection

When an employee shows up that is on *Global Assignment* or *Concurrent Employment* in your search, multiple assignments appear under one name. You can indicate the appropriate employment you want by selecting the assignment job title under employees name.

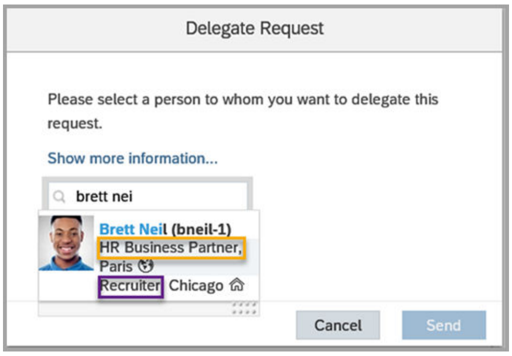



Figure 29: Screenshot of Employee on Global Assignment With Two Different Assignments Listed Under Name

## Related Information

More Information About People Searches for Global Assignment and Concurrent Employment:
Global People Search

# 9.8 Using Alerts

If alerts are set up for your system, they will be generated according to their configuration. For example, when a certain date is approaching, alerts are generated, either as emails or as items on the To-Do list, to remind the user to take action.

An alert can be created to inform a manager several days before an employee's contract ends, when an employee will be returning from a parental leave soon, or if a workflow is stalled. On the latest home page, alerts are represented by *Take Action* cards in the *For You Today* section.

## 9.8.1 More Information on How Alerts Appear

Alerts can appear as e-mails, to-dos, or both for HRIS, MDF, and for time-off.

Table 13: How Alerts Appear

<table>
<tr><th>How Alerts Appear</th><th>Description</th></tr>
<tr><td>Alert E-mail</td><td>
An e-mail is sent to notify a specified person.

**Example**

An email alert when the *CC Role* in the workflow configuration is selected to receive notifications.

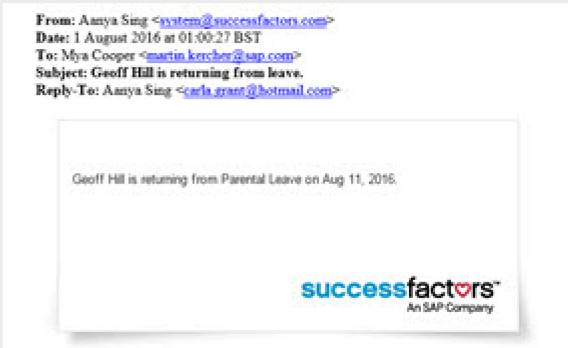



Figure 30: Email Notification Sent to Person Designated as CC Role
</td></tr>
</table>

<table>
<tr><th>How Alerts Appear</th><th>Description</th></tr>
<tr><td>To-Do Alert</td><td>Alerts appear as Take Action cards in the For You Today section. Take Action cards of the same category are stacked. Clicking on a stack disperses the cards.

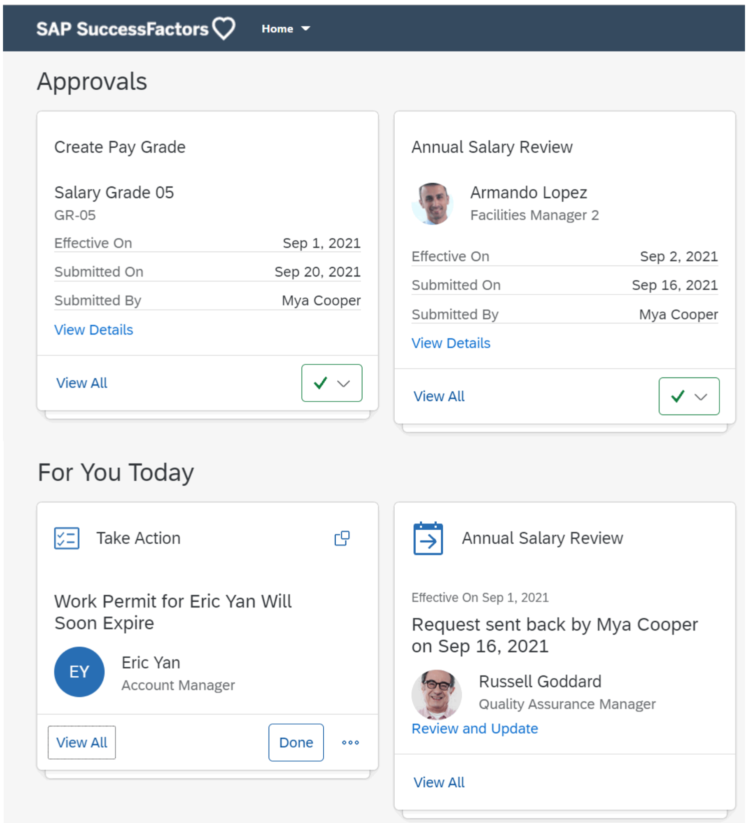



Figure 31: Take Action Cards on Home Page

Choosing the Take Action section on the To-Do list opens the Take Action dialog, which lists to-do alerts.

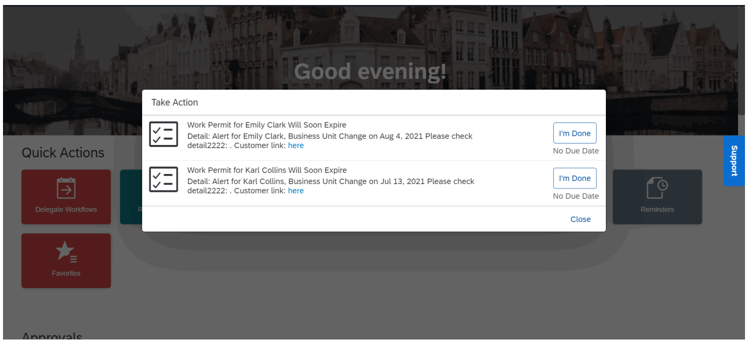



Figure 32: The Take Action Dialog Box</td></tr>
<tr><td>To-Do and Alert E-mail</td><td>Alert cards appear in the For You Today section on the home page and e-mail notifications are sent out.</td></tr>
</table>

> **i Note**
>
> We recommend that you test alerting extensively in a test system with a limited number of users, and fine-tune your *if* statements in your alert rules before using the feature in a production environment. Ensure that you test the rules for all business transactions (including create, change, and delete) to eliminate unwanted alerts. When you receive unwanted alerts, you can adjust your *if* statements in your alert rule. Alerts cannot be deleted.

## 9.8.2 Orphaned Alerts

You can now distinguish the difference between which alerts triggered successfully from **orphaned** alert by viewing from your *To-dos* list from the *Take Action* tile.

### About Orphaned Alerts

There are several scenarios when once you have created and triggered an alert, that it becomes **orphaned**:

- Data that triggered the alert is removed
- Referenced data such as tokens or tags is not correct in the default message header or body in the alert message.
- Alert Message has been removed
- Alert is removed from the database.

  > **i Note**
  >
  > Alerts that are removed from the database can only be removed from the backend using a *db* script.

The orphaned alerts are included in the alert count when Approvers view their *To-dos* from the *Take Action* tile on their homepage that contain a generic error message stating that source data has been removed.

> **Example**
>
> An alert was triggered for job classification change for an employee: Jack Kincaid. The alert appeared as it would in the To-dos when viewing from the *Take Action* tile. Later, HR administrator removed the job classification change for this employee. When the alert triggered again, it appears as an **orphaned alert** with a generic error message.

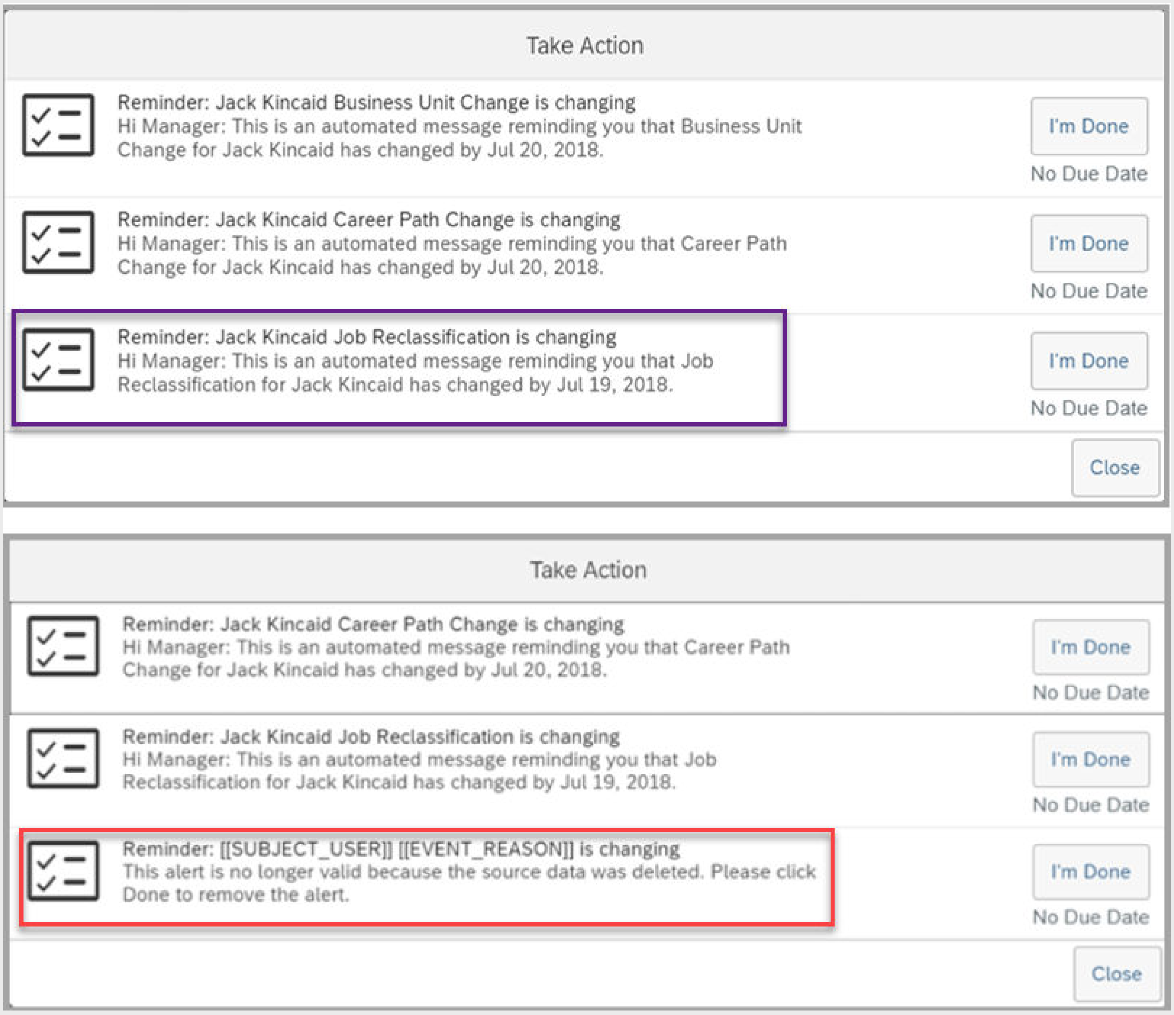



Figure 33: Two screenshots - One with the Successful Alert and Another After Data That Triggered Alert is Removed

## 9.9 Workflow In-Flight Changes

As the approver of a workflow, you might still change the workflow data, depending on how the workflow object is configured. In the workflow object, the admin can configure whether the approver is allowed to make changes and whether the changes reroute the workflows.

### Editing Options

The different options available are:

- *No Edit*: The option restricts the Approver from making any changes.
- *Edit with Route Change*: This option gives the Approver permission to modify the workflow transaction. After the changes are made, the transaction will be reevaluated and a new workflow automatically

triggered. This can be the same workflow, but based on the given changes, can also result in a different workflow.
- *Edit without Route Change*: Similar to the above, the Approver can make changes. However, the workflow then continues to the next step and there is no new workflow.
- *Edit Attachment Only*: With this option, the Approver can only change attachments available in the workflow content. Changes to the route are not permitted.

> **i Note**
>
> Changes for dependents and work permit workflows are NOT supported.

## Editing Workflow Attachments

When permitted, approvers can upload or make changes to attachments in a workflow. The attachment is part of the transaction and is saved with it.

This is currently supported only for these workflow types:

- New hire, rehire, or internal hire workflow
- Job Info change workflow
- Termination workflow
- Global Assignment workflow

The *Workflow Attachment* portlet is visible in the following scenarios:

- If the workflow is pending and the user is the current step approver (includes delegatee and excludes delegator). In other words, when the approve, delegate, send back, decline delegation buttons are visible and the workflow step setting is either Edit attachment only, Edit with route, or Edit without route.
- If the workflow is sent back and the user is the initiator.
  The following actions will save the attachment: approve, send back, delegate, decline delegate (for delegatee), resubmit (for initiator). A message is displayed confirming the update to the attachment.

> **→ Remember**
>
> When you cancel or exit a workflow that has an attachment without saving, the attachment is purged. Attachment saves only when portlet is saved and is changed to active status.

## Related Information

Creating an Individual Workflow [page 24]

# 10 Using the Check Tool to Solve Issues

Get an overview of potential problems and errors in your configuration that you can try to solve yourself before you contact Product Support about an issue.

## Prerequisites

- You've enabled the Metadata Framework.
- You have the following *Administrator Permissions* > *Check Tool* permissions:
  - *Access Check Tool* authorizes users to access the tool.
  - *Allow Configuration Export* authorizes users to attach configuration information to a ticket.
  - *Allow Check Tool Quick Fix* authorizes users to run quick fixes for the checks that have this feature. A quick fix can be used to immediately correct any issues found by that check.

  For more information about role-based permissions, refer to List of Role-Based Permissions.

> → Tip
>
> Refer to Guided Answers for the Check Tool for a guided navigation through the available check tool checks and more information on each check.

## Context

The check tool provides an overview of the issues found in the system. New checks that are being added in a new release go through a first initial run to return a result. After the initial run, checks are run on a regular basis (at least monthly). We recommend you open the check tool after the upgrade to a new release to see if issues have been found by new checks.

In addition to these runs performed by the system, you can also run individual checks after you made changes to the system, for example, after updating data models or picklists. For more information, refer to the application-specific documentation.

## Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens displaying the results of the first tab **System Health**.
2. Depending on the check type of the check you're interested in, select the corresponding tab.

| Tab | Description |
|---|---|
| *System Health* | Displays configuration checks that have returned errors or warnings after the last run. We recommend you solve these in a timely manner.<br><br>To display all checks, select all result types in the *Result Type* search filter and select *Go*. |
| *Migration* | Displays the migrations that are still pending, either because the check tool couldn't automatically migrate all issues or because new issues have been found after the last run. We recommend you solve these in a timely manner.<br><br>To display all checks, turn on the *Show completed migrations also* search filter and select *Go*. |
| *Validation* | Displays a list of all validation checks.<br><br>**i Note**<br><br>Validation checks require one or more parameters for execution, therefore we can't run these checks automatically. You need to enter input parameters and run the corresponding check manually to get results. |

3. To solve a check that returned issues, click on it.

   The detail view opens to the right side of the screen with more information on the check and on how to solve the issue.
4. Evaluate the results and resolve the issues. If the check provides a quick fix that you can use to immediately correct issues found during a check run, select the *Quick Fix* button.
5. If you encounter an error you can’t resolve, contact Product Support by creating a ticket.

## Next Steps

To verify that you've solved the underlying issue, select the checkbox for the corresponding checks and choose *Run Checks*. You can also wait until the next automatic run to see if the issue has been solved.

> **i Note**
>
> If the check you selected requires one or more prechecks (checks that need to be run successfully first), the prechecks are run first even if you haven't selected them.

## Related Information

Running Checks [page 210]

[Using the Quick Fix Feature [page 215]]

## 10.1 Benefits of the Check Tool

The SAP SuccessFactors check tool helps you identify and resolve issues when your system doesn't work as you expect.

If your SAP SuccessFactors applications are behaving in unexpected ways, it is likely that it has a configuration or data conflict: you have some data that is inconsistent or a configuration error. The check tool quickly identifies these types of problems so that you can avoid support tickets. You might still need to create a support ticket if the problem is severe, but even in severe cases, the check tool can save you time because it can export the results of the check and your configuration for Product Support. The support engineer, therefore, can identify the issue more quickly.

When you open the check tool, you see:

- A list of issues in your configuration or data and the severity of each issue.
- A solution or recommendation to address the issue.

## 10.2 Running Checks

Trigger the execution of individual checks to find potential issues in the system, or to check if an issue has been solved in the meantime.

### Prerequisites

- You've enabled the Metadata Framework.
- You have the following *Administrator Permissions* > *Check Tool* permissions:
    - *Access Check Tool*
    - *Allow Configuration Export*
    - *Allow Check Tool Quick Fix*

### Context

In addition to the job runs performed automatically by the system, you can also run individual checks. For example:

- You want to check if the issue has been solved.

- You want to run a check as a prerequisite or post-step of a task. For example, you made changes to the system (such as updating data models or picklists), and you want to verify your changes didn't cause any new issues. For more information, refer to the application-specific documentation.
- Validation checks need to be run manually as they require input parameters.

## Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens displaying the results of the first tab *System Health*.
2. Depending on the check type of the check you want to perform, select the corresponding tab.

   A list of checks is displayed in the results table according to the predefined selection criteria.
3. **Optional:** If the check you're searching for is not listed in the results table, adjust the selection criteria and choose *Go*.

   You get a list of checks that fulfill the selection criteria you've entered.
4. Select the corresponding checks, and choose *Run Checks* from the top right of the results table.

   > i Note
   >
   > Please note that for checks on the *Validation* tab, you can only select one row at a time. Execution of multiple checks at once is not possible.
   >
   > Also, for validation checks you need to enter the required input parameters when running a check.

   > i Note
   >
   > If the check you selected requires one or more prechecks (checks that need to be run successfully first), the prechecks are run first even if you haven't selected them.

   The *Results* column displays any issues found.

## Next Steps

Investigate and solve the underlying issue.

# 10.3 Check Types

Overview of the different check types and their purpose.

The check type groups those checks that have a common purpose. On the *Check Tool* page, each tab represents a check type.

Table 14: Overview of Check Types

| Check Type | Description | Automatic Job Runs |
|---|---|---|
| System Health | Checks that run without parameters and check configuration and data issues that need to be fixed.<br><br>The predefined selection criteria displays only those that have returned errors or warnings after the last run. We recommend you solve these in a timely manner.<br><br>To display all checks, select all result types in the **Result Type** search filter and select *Go*. | • Automatic initial run at the beginning of a new release<br>• Periodic runs (usually monthly) |
| Migration | Checks that perform an automatic migration of features.<br><br>When you open the page, only pending migrations are displayed. To display also the competed migrations, turn on the *Show completed migrations also* search filter and select *Go*. | • Automatic initial run at the beginning of a new release<br>• Periodic runs (usually monthly) |
| Validation | Checks which need one or more parameters for execution, for example:<br>• A specific template<br>• A specific user<br>• A specific time frame<br><br>Validation checks can be triggered by single selection and choosing the *Run* button. A popup appears with input fields for the parameters. Execution of multiple checks at once is not possible. | Only triggered through user |

## 10.4 Check Results

After you run checks in the check tool, it returns the results of the check so that you can resolve issues that it found.

The results of a check are displayed in the *Result* column. If you run the checks multiple times to see how you're resolving issues, you can select a previous result from the *History* dropdown list.

> **i Note**
>
> To display the *History* dropdown list, click on a check. On the details screen that opens on the right side of the page, expand the header. The *History* dropdown list is directly below the check title.

Table 15: Possible Results of Check Tool

| Result | Action |
|---|---|
| No issues found | If the tool can't find issues, you see a green check mark in the *Result* column. |
| Issues found | If the tool finds issues, it reports the number of issues and a yellow warning icon or a red alarm icon.<br>• The yellow icon indicates a low severity issue. The system proposes a solution.<br>• The red icon indicates a high severity issue. You must take action, which could include creating a support ticket. |
| Pending migrations | If the tool finds pending migrations that need to be completed by the user, you can see a yellow warning icon or a red alarm icon in the *Status* column on the *Migration* tab. |
| Completed | If the tool finds no issues with migration, or the migration has already been completed, you see a green check mark in the *Status* column on the *Migration* tab. |

**i Note**

- Select the *Export Results* button to download the check results. Ensure you run the check before exporting the check results. If not you can view only the first 100 check results.
- The downloaded check result table can display a maximum number of 10,000 rows.

### Related Information

Creating Product Support Tickets from the Check Tool [page 213]

## 10.5 Creating Product Support Tickets from the Check Tool

When the check tool reports a serious issue that you can't solve, you might need to contact Product Support. You can create a support ticket from within the check tool.

### Prerequisites

You've run the check tool. You can find the check tool by going to *Admin Center* > *Check Tool*. You create the ticket from the details page of the tool.

## Procedure

1. Click on the check you can't solve.

   The detail view opens to the right side of the screen with more information on the check and on how to solve the issue.
2. On the *Result* tab, scroll down to the results table to look for the errors you want to report on.

   You usually contact Product Support for high severity issues not low severity issues.
3. On the *Check Information* tab, under *Need Assistance?*, copy the component ID.

   For example, LOD-SF-EC is the component ID for Employee Central.
4. Create a customer incident in the relevant category.
5. When you create the ticket, paste the component ID into the ticket.

# 10.6 Exporting Configuration Information

Export the configuration information from your system and attach it to the Support ticket created from the check tool. This information can help Support identify the issue of a check you can't solve yourself.

## Prerequisites

You have the *Administrator Permissions* > *Check Tool* > *Allow Configuration Export* permission.

## Context

> **i Note**
>
> Not all applications have this feature enabled.

## Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens.
2. In the top-right corner, select *Use legacy Check Tool UI*.

   The legacy check tool UI opens with a list of all applications for which you can use the check tool.

3. Select the corresponding application.

   If the application has the export configuration feature enabled, you can see an information message at the bottom of the page with a link.
4. Choose the *Export Configuration* link in the information message.

### Results

The system downloads a file with the configuration information for the application you've selected.

### Next Steps

Attach the downloaded file to the Support ticket you created from the check tool.

## 10.7 Using the Quick Fix Feature

The check tool includes a quick fix feature that you can use to immediately correct issues found during a check run.

### Prerequisites

The checks which you want to solve with a quick fix have run and provide a check result with error or warning.

### Procedure

1. Go to *Admin Center* > *Check Tool*.

   The **Check Tool** page opens.
2. Click on the corresponding check you want to fix.

   The details screen opens on the right side of the page with more information about the check. If the check includes a quick fix, the *Quick Fix* button is displayed on the *Result* tab, under *Proposed Solution*.
3. Choose *Quick Fix* to start fixing the issue.

   A third screen opens to the right side, with step 1, called *Select Correction*, that shows one or more corrections for the issue.
4. Select the correction you want to carry out and choose *Step 2* to proceed to *Final Approval*.

In the *Final Approval* step, you can opt to change your mind and not carry out the fix.

5. If you want to proceed, choose *Step 3*.

   The system confirms that the fix is now running.
6. Choose *Close* to complete the procedure.

   The system verifies that the fix has run correctly after a short time by running the check again.

## 10.8 Exporting a List of All Checks

Get an overview of all checks available in the system by exporting a CSV file.

### Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens.
2. In the top-right corner, select *Export all checks*.

   A CSV file with all checks available in the system is downloaded, including check descriptions and application area.

   > **Note**
   >
   > The list includes also checks that you can't access from the user interface if you don't have the corresponding applications set up, or if you lack the required permissions.

# 11 Change History

Learn about changes to the Implementing and Managing Workflows guide in recent releases.

## 1H 2023

| Type of Change | Description | More Info |
|---|---|---|
| Added | We added a new section to include technical prerequisites for all customers. | Prerequisite Checklists [page 12] |
| Changed | We changed some wording for clarity. | Role-Based Permissions for Workflows [page 15] |
| Changed | We modified step 4 to reflect that the *Localized Header* and *Localized Description* fields ( marked by asterisks) are no longer optional. | Creating Custom Alert Messages [page 108] |

## 2H 2022

| Type of Change | Description | More Info |
|---|---|---|
| Changed | We added information about two new admin alert types and existing ones. | Responding to Stalled Workflows in Admin Alerts [page 148] |
| Changed | We included information about the tag `TIME_OFF_STATUS`. | Available Workflow Tags for E-mail Notifications [page 87] |
| Changed | We've moved this Change History from the beginning to the end of the guide. Follow the link on the right to go to the new landing page. | Workflows in SAP SuccessFactors Employee Central [page 6] |
| Added | We added a piece of information about admins alerts on the latest Home Page. | Workflows in SAP SuccessFactors Employee Central [page 6] |

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