



# 2277529 - How to Create a Workflow

## Symptom

- How do I create a Workflow?
- What are the configuration steps and explanation of all fields associated to workflows?

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## Environment

SAP SuccessFactors Employee Central

## Resolution

### Steps:

1. Navigate to Admin Center > Manage Organization Pay and Job Structures > Create New > Workflow;
  - Manage Organisation Pay and Job Structures, on British English;
2. Enter a Workflow ID (only 32 characters allowed);
3. Enter a Workflow Name (only 32 characters allowed);
4. Enter the details of the Step Approvers in each step;
5. Enter the approver type and fill in all related fields;
6. Click Save.

Here is the explanation of fields used in Workflow Foundation Object Configurations

### Remind In days:

- The Workflow Foundation Object Configuration can be defined so that the current Workflow Step Approver will be reminded to take action on a pending workflow after a certain number of days.
- For configuration details click here  
(<https://apps.support.sap.com/sap/support/knowledge/public/E/2079471>)

**Is Delegate Supported:**

- Delegation enables an option that will allow an Approver to Forward the Workflow to Another System User within the Company schema
- This user will be able to take ownership of the Workflow
- The Appointed User will have the ability to Approve or Decline the workflow in lieu of the Initial Step Approver
- The recipient of the Delegated workflow will have the option to refuse the Delegation Request
- The Initial Approver has the ability to Recall the workflow
- For more details click here (<https://apps.support.sap.com/sap/support/knowledge/public/E/2080882>)

**Context field:**

- The context field will tell the system how the Step Approver should be resolved
- There are two (2) available options
  - Source
    - The value "Source" will represent the person that maintains the role/position prior to the Workflow Transaction
  - Target
    - The value "Target" will represent the person that maintains the role/position after the workflow transaction would be completed
  - Example A: I have an Employee who is transferring from Manager A to Manager B and I want Both Manager A & Manager B to approve the workflow.
    - In the above scenario, I would have two approvers:
      - Step Approver 1 = Role = Manager / Context = Source
        - This is Manager A
        - This Step represents the employees manager prior to triggering the manager transfer.
      - Step Approver 2 = Role = Manager / Context = Target
        - This is Manager B
        - This Step represents the employees manager after the manager transfer workflow is approved.

**Edit transaction:**

- During the creation of a Workflow, the field 'Edit transaction' has to be defined if the workflow step approver can edit the submitted workflow
  - The options are:
    1. **No Edit:** The approver will not be able to Edit the transaction that triggered the workflow.
      - This is the standard option that the system will default to for a step approver configuration
    2. **Edit with Route Change:** The approver can Edit the transaction that triggered the workflow and the workflow will start the process anew.
      - If the workflow is Edited - The system will automatically reject the previous workflow transaction and then will re-trigger the workflow and start the approver process from the beginning
    3. **Edit without Route Change:** The approver can edit a workflow transaction
      - With this option, the Edited Workflow Transaction will Continue with the next step approver
      - The workflow will not be rejected and re-triggered
      - The next Step approver will have the opportunity to approve/reject the workflow
    4. **Edit Attachments Only**
      - Approver can only edit the attachments of the workflow. You can also add this possibility if you would like to add an attachment during the workflow process.

1.

**No approver behavior:**

- Following values are displayed in this drop down
  1. **Stop the Workflow:** The Workflow Step approver with this option selected is respected by the system as a mandatory step
    - If the system is unable to resolve an approver for this step, the system will not be able to proceed with the transaction for the triggered workflow
  2. **Skip this Step:** In the case where the system is unable to resolve a user for the current Workflow Step, The Workflow step will be skipped
    - The workflow will continue to the next step
    - If there is no next step approver to resolve, the workflow will get automatically approved
    - This option is the default selection for this field

**Respect RBP**

- Respect RBP = Yes
  - If the setting is flagged as Yes, The approver will only have access to see the fields which the approver has granted permissions to see
- Respect RBP = No
  - If the setting is flagged as No, the approver will have access to all fields that were included in the transaction

**Relationship to Approver:**

- The Relationship to Approver tells the system how to relate the resolved approver to the transaction that triggered the workflow
- User Based Approver Types:
  - The Relationship to Approver will allow the selection of:
    - Employee - The employee which had a data change that triggered the Workflow
    - Initiator - The Initiator of the data change transaction that triggered the workflow
- Position Based Approver Types:
  - The Relationship to Approver when it is a Position based Transaction will allow the selection of:
    - Employee Position - The system will resolve the approver based on the relationship to the positions incumbent
    - Initiator Position - The system will resolve the approver based on relationships to the initiators position
    - Position - The system will resolve the approver based on the sole position, and not based on the incumbents data
  - For more information about this option, please reference this page in the guide:
    - Position Relationships  
(<https://help.sap.com/viewer/7a4a65f1ace44f5ba6e969f7e952674a/latest/en-US/39081e44351b4784a5daac416a85740b.html>)

**| See Also**

Employee Central Workflows: Implementation and Administration

(<https://help.sap.com/viewer/7a4a65f1ace44f5ba6e969f7e952674a/latest/en-US/0ae2cca1946a4286898f83be268fa4d9.html>)

2610953 (<https://launchpad.support.sap.com/#/notes/2610953>) - How To Import Dynamic Roles Via Import Foundation Data

## | Keywords

workflow creation, wfl, SFSF, SFEC, Position Relationships, no approver behavior, skip this step, remind in days, stalled request, invalid approver, relationship to approver, stop the workflow, delegate supported, no edit, edit with route change , KBA , LOD-SF-EC-WFL , Workflows - Configuration, Tools, Objects & Rules , LOD-SF-MDF-WFL , Custom Object based Workflows , How To

## | Product

SAP SuccessFactors Employee Central all versions ; SAP SuccessFactors HXM Suite all versions

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