Q2 2019
SuccessFactors Review

EC Core HR

- Helen Dunn

This quarter's release for Employee Central provides us with several understated, yet valuable universal enhancements made to Core HR functionality. As a reflection of SuccessFactors view to continued improvement, we are encouraged to see some further refinements made to previous enhancements, such as document management categories and date of change fields for Pay components. Plus, some notable new features in Workflows and Position Management. We'll begin this section with a look at two key hire related enhancements bringing improved functionality and useful solutions.

Access to Future Hires & Transfers

There has been a long-standing struggle faced within SuccessFactors regarding transfers and re-hires, or more specifically, access to these individual's data and employee file prior to their transfer/hire date.

When an employee is transferred or re-hired to another legal entity within a company, at present receiving Managers and Admins could not access their transfer/ new hire's employment file or data and as such any in system pre-hire actions or data reviews could not be performed until the very last moment, prior to the employee's first day. SuccessFactors has understood this limitation and utilising Dynamic Group filters has provided a solution in which those required to, can access said data prior to the effective date or transfer.

Where the permission in which the view/ edit access to employee data is dependent on an effective dated object such as Job Info, Personal Info, Department etc, a new parameter can now be added for these objects

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defining a number of days from change. The defined number of days would then allow for these future hires to be captured by the filter and then visible to the receiving manager and/or admin, prior to the hire/transfer date.

To configure this option, a dynamic group filter must be applied against the HRIS element implicated in a transfer/hire/rehire change with the parameter defined in number of days. Presently this is not available through the Manage Business Configuration UI and can only be defined within the Dynamic Group filter section of the Succession Data Model. The SAP provided screen grab of the Succession Data Model below provides an example of the filter configuration.

How to configure a DG-Filter using the new parameter

Universal/ Reference Number: ECT-109827

1. Go to the DG Filter section of the *'Succession Data Model'* (Note the parameter can't be added via *'Manage Business Configuration'* yet.)

2. Add the new parameter called <extendend-by-n-days="nnn"> to the filter criteria where required

3. Upload the Succesion Data Model

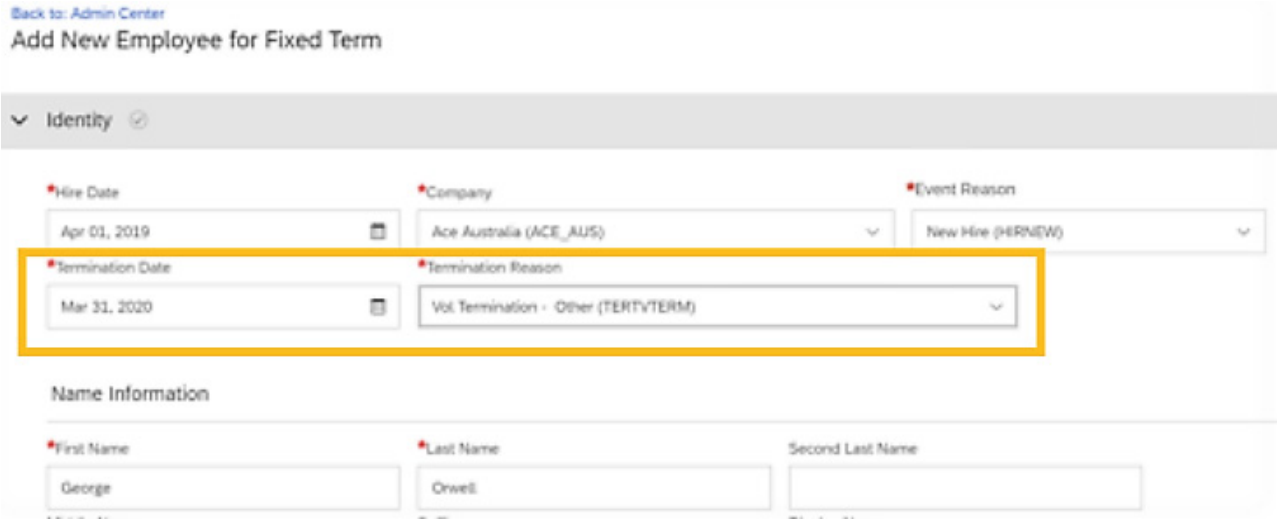
Example:

```
<dg-filters>
  <permission-group-filter>
    <hris-element-ref refid="personalInfo" extend-by-n-days="30">
      <hris-field-ref refid="nationality"/>
    </hris-element-ref>
    <hris-element-ref refid="jobInfo" extend-by-n-days="100">
      <hris-field-ref refid="job-code"/>
    </hris-element-ref>
  </permission-group-filter>
</dg-filters>
```

Fixed Term in One Step

Across many industries, there can be a requirement when hiring an individual on a fixed term contract that their end date, and corresponding termination reason, must be input at the beginning of the hire. This scenario is often seen in countries experiencing economic difficulties or restrictions on hires and may also suit businesses who wish to better manage terminations for their fixed term employees. Prior to this recent enhancement, in order to enter both hire details for fixed term employees and subsequent termination dates, system users would have to perform these actions within two separate steps. SuccessFactors have introduced a feature enhancement in which these actions for a fixed term hire can be completed within one step from the initial Hire screen.

Within the Hire screen, on selection of a fixed term hire, this enhancement would provide two additional fields displayed directly beneath the hire date fields, allowing a system admin to enter a termination date and termination reason at the very start of the hire process. There are very minimal configuration elements needed to utilise this new feature, Users can simply enable the "add new for fixed term" permission from the Manage user element of RBP. The feature is provided as a standalone permission setting and as such can allow for only this type of fixed term hire to be available to use, should a company be restricted from other open ended or permanent hire options.



No change until date

With this enhancement we see a follow-on upgrade made to the "No change until" feature that was introduced for Pay Components in the previous Q1 release on April 5th 2019. This enhancement introduced an additional field within Admin and Manager Self Service (MSS) views when a future date Pay Component change had been applied for an employee. This field, showing within the employee file and portlet history, displays "No changes until date" with the effective date of change displayed. This feature is intended to provide a clear and quick overview of any upcoming changes to an employee Pay Component, better ensuring any offline actions and mapped integration actions relating to this Pay Component change aren't enacted too soon.

So, with the clear benefits of this additional feature, SuccessFactors has further ensured that the view of this detail is covered in multiple areas with the No change until date field now also represented within the left-hand column of the change history screen and audit. This Universal enhancement will update automatically for companies with this field already enabled.

Document Upload Categories

Across all portlets within Employee Central, there are a number of areas where additional documents can be loaded as an attachment against an employee's record: for example, evidence of a work permit, a marriage certificate or notice of termination letter. These documents have, until now, been assigned a general EC document category within Document Management. This works effectively but of course is somewhat limited should you wish to review, organise or filter on these document types. The Q2 release introduces further document categorisation in EC referencing the HRIS object associated to the document (Personal Information, National ID, Job Information, Home address and more) and the respective user or relevant person data. This categorisation will provide more specific and advanced filtering options, greater ease in differentiating between portlet areas when managing documents and improve integration with any other document management systems in use.

Position Management

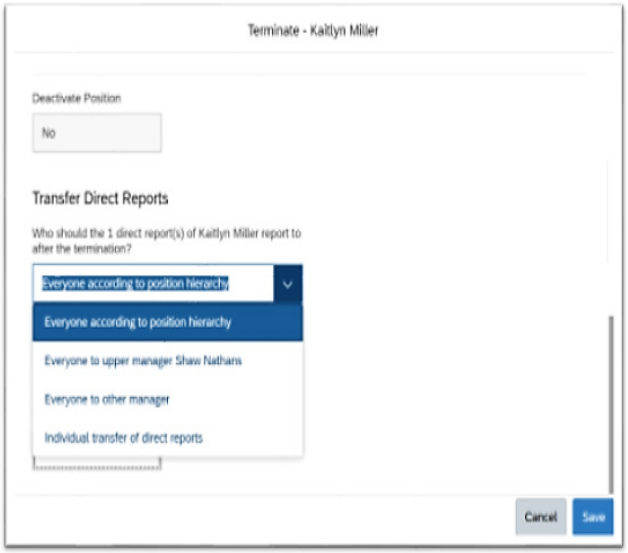
We see two major enhancements made to Position Management in the areas of Transfer

of Direct reports and data synchronisation from Position quick card.

Transfer of Direct Reports

When processing a Leaving Manager through termination, many Companies require to transfer responsibility of the manager's direct reports to another individual within the company. SuccessFactors have introduced a new feature in this release whereby the transfer of these reports can be automatically processed in line with the position hierarchy rather than as a purely manual process. From directly within the termination screen when processing a leaving manager, a new option to "Transfer Direct Reports" will be available.

If selecting to enable this enhancement, you can define the transfer by position hierarchy as either optional or always. An "always" selection will default the transfer of direct reports automatically by the existing position hierarchy with no further definition required by the administrator processing the termination action. A selection of "optional" for this setting will provide a dropdown list of potential transfer of direct reports options, with the default option set as transfer by position hierarchy. The "optional" setting will allow some transfer variation such as to the "upper manager", "other manager" or "individual of direct reports". This allows for the transfer by hierarchy to be utilised but also allows for adjustment or variation should the defaulted transfer not be the best suited option.



There are a number of caveats with this feature in that the company design must be lead by position hierarchy. This feature will error if there are any misalignments between the listed supervisor in Job info and Position; this would require a data check and manual adjustment prior to utilising the new feature.

Position Quick Card

The upcoming Universal enhancement to the "Manage" link within the position quick card is a pleasant mix between a notable fix and an enhancement; either way it will be incredibly well received. Prior to this enhancement it was often easy to experience data inconsistencies when changing position data directly from the Position quick card. This is due to the fact that when making a change to position from the position quick card "Manage" link, the system would navigate to the Manage Data screen, however this Manage Data screen did not have the appropriate settings to synchronise this change to position to the incumbent directly.

Avoiding these data inconsistencies entirely, the enhancement applied this quarter now ensures that when accessing the "Manage" link from the Position Quick card, the system now navigates to Manage Position which does then synchronise effectively to the incumbent. It is worth noting that Manage Data changes through the admin centre also do not synchronise the change between position and incumbent. All changes, regardless of the route in which you access the screen should be performed through Manage Position in order for the change to be correctly synchronised.

Workflow

A final interesting area of note in this quarter's release can be seen with Workflows. Now, depending on a number of factors whether that be busy workloads impacting an approver's attention to detail or a maybe a mis-placed mouse click, sometimes, somehow a workflow request may be erroneously approved. Fortunately, many Companies employee a two-step approval design and have functionality to recall or amend this data, however with the introduction of this next admin opt in feature the risk of mistaken approvals can be limited from the outset. Utilising role base permissions, a feature called "Prevent Quick Approval of Workflows" can be enabled which will hide the Approve button from the to-do overview screen and approval request. This will also result in the Approve button only then becoming accessible from the Workflow details screen when opening each individual workflow request.

This feature may not be appropriate to enable for large workforces with a high volume of requests, or companies with small approval teams, however with the permissioning capability of this feature, it could be utilised to define certain users specifically to only have access to approve once viewing the full details from the workflow details page, whilst still allowing other users the full quick approvals access.

This workflow enhancement could provide a useful solution to better manage workflows and accurate data quality, and with its ability to define access by user could prove very useful to uptake.

Conclusion

Many useful updates have been made within the hire areas of EC and termination areas with the transfer of direct reports. A lot of these enhancements are universally applied where the initial pre-requisites are already active within the system, meaning little configuration is required to uptake. This is beneficial to our busy customers, allowing these updates to be configured with minimum impact.

A final take away worth mentioning is regarding the information provided in the Q2 IRRs on SuccessFactors Implementation Design Principles (IDPs). IDP documents aim to provide proactive guidance on applying SuccessFactors' products in ways that address specific business scenarios. These documents are compiled taking into consideration experience of past implementation projects, typical business requirements as well as real-life implementation challenges. It is worth taking a deeper look at these documents available through customer and partner SAP Pages (found in this community page here) if you find yourself interested in learning more about approaches and strategy utilised in implementing SAP SuccessFactors.

How Can We Help?

Zalaris excels in delivering comprehensive HR and payroll services across the UK, Northern Europe, the Baltics and Poland. Our industry leadership position, however, goes beyond the borders and constraints of other providers to enable what matters most to our clients: maximising the value of human capital through excellence in HR processes.

- **Scoping Services** - for if you are thinking of moving to the HCM Cloud but are unsure of where to start.
- **Support Services** - for if you are already using SAP SuccessFactors and want a flexible support partner.
- **Release Management Services** - for if you are struggling to take advantage of the quarterly innovations in SAP SuccessFactors.
- **Business Process Services** - for if you are looking for operational support with your HCM processes.
- **Training Services** - for if you are not getting the most out your SuccessFactors system.