Employee Central manages the various employee events and Event Reasons that can occur during the lifecycle of an employee. New hire, transfer, promotion—the se are just a few of the changes Employee Central can track. We will look at the different events and Event Reasons within Employee Central, and the workflows that can be put in place to automate the event management and approval process.

“Events and Workflows”

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The Comprehensive Guide

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Employee Central manages the various employee events that occur during the lifetime of an employee. Multiple reasons can be created for each event. Coupled with workflows, this provides an automated way to manage events and have them approved in a robust process.

4 Events and Workflows

An employee will typically undergo several different events throughout his or her lifetime at an employer. This process begins immediately with a Hire event, and may include any number of other events, such as Transfers, Promotions, Pay Changes, and Terminations. Employee Central manages each of these events and provides customers with the ability to define multiple Event Reasons for each event. These Event Reasons identify the specific reason that an event took place.

Although not always directly linked, events and workflows can work mutually to enable approval of data changes created by an event prior to the event being committed to the employee’s record. These workflows typically arise in ESS and MSS scenarios. Workflows ensure that employees and managers enter the correct data, but also—more importantly—enable compliance with decisions that may have financial and legal implications.

In this chapter, we'll look at the events provided in the system and how Event Reasons can be created and used. We'll then take a look at workflows in detail, covering the concepts and objects that enable workflows to operate, how and where workflows are triggered, the workflow process, and general administrative activities.

Before we examine events and Event Reasons, we should first briefly look at the different employee statuses that employees can have.

4.1 Employee Status

Employees can have an employee status that identifies their active or inactive status within the organization. Employee Central provides nine employee statuses:
Events and Workflows

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The employee statuses provided in the system cannot be changed, but the label of each EMPLOYEE STATUS can be changed (e.g., Paid Leave could be renamed to Paid Leave of Absence).

The EMPLOYEE STATUS can be displayed in an employee’s Job Information portlet and is also visible in the History screen of that portlet. The EMPLOYEE STATUS field is shown in the Job Information section in Figure 4.1.

![Figure 4.1 Job Information Portlet](image)

### 4.1.1 Active versus Inactive
All employee statuses consider the employee still to be active within the organization, with the following exceptions:

- Retired
- Terminated
- Discarded
- Furlough

When an employee has any of these four statuses, he or she is considered to be inactive. If Employee Central is integrated with other systems, such as a payroll or a benefits system, then the employee may become inactive in those systems as well when their status changes to one of these inactive employee statuses.

Retired is used with the Pensions Payouts feature, which is covered in Chapter 16, Section 16.5.

### 4.1.2 Employee Status Changes
The employee status of an employee cannot be changed manually: It is always changed by an Event Reason. Event Reasons can have an employee status assigned, although it is not mandatory. When an event occurs for an employee and an Event Reason is selected (either manually or automatically by the system using an Event Derivation), then the employee’s status will change to the status assigned to the Event Reason. If the Event Reason has no employee status assigned, then the employee’s status will remain unchanged. Let’s look at two examples:

An employee with an Active status receives a salary increase using a customer-specific Event Reason, called Annual Salary Increase. The Annual Salary Increase Event Reason has no employee status assigned, because a salary increase doesn’t change the status of an employee. Therefore, the employee’s status remains as Active. A few months later, the employee decides to leave the company, so an administrator performs a termination in the system with a customer-specific Event Reason called Resignation. The Resignation Event Reason has Terminated assigned as the employee status. Therefore, the employee becomes inactive with the status Terminated. We will look more closely at how employee statuses are assigned to Event Reasons in Section 4.2.1.
Now that you are familiar with employee statuses, let’s move onto looking at events and Event Reasons.

### 4.2 Events and Event Reasons

The system provides a standard set of events, and you cannot extend this set of events. This set of events is provided as a picklist. You can modify the event labels for each enabled language, just as other picklist labels can be renamed. Periodically, SAP SuccessFactors may introduce new events into the system.

Table 4.1 shows the standard picklist provided as of the Q4 2015 release.

<table>
<thead>
<tr>
<th>Event</th>
<th>Code</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Job</td>
<td>1</td>
<td>Defunct</td>
</tr>
<tr>
<td>Assignment</td>
<td>2</td>
<td>Defunct</td>
</tr>
<tr>
<td>Assignment Completion</td>
<td>3</td>
<td>Defunct</td>
</tr>
<tr>
<td>Job Change</td>
<td>16</td>
<td>Change in job</td>
</tr>
<tr>
<td>Completion of Probation</td>
<td>15</td>
<td>Available for manual use only</td>
</tr>
<tr>
<td>Data Change</td>
<td>5</td>
<td>Miscellaneous data change</td>
</tr>
<tr>
<td>Demotion</td>
<td>4</td>
<td>Change in job</td>
</tr>
<tr>
<td>Furlough</td>
<td>11</td>
<td>Leave of absence</td>
</tr>
<tr>
<td>Hire</td>
<td>H</td>
<td>Hire/rehire</td>
</tr>
<tr>
<td>Job Reclassification</td>
<td>9</td>
<td>Job reclassification</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>10</td>
<td>Leave of absence</td>
</tr>
<tr>
<td>Pay Rate Change</td>
<td>12</td>
<td>Compensation change</td>
</tr>
<tr>
<td>Position Change</td>
<td>13</td>
<td>Change in position or position reclassification</td>
</tr>
<tr>
<td>Probation</td>
<td>14</td>
<td>Available for manual use only</td>
</tr>
<tr>
<td>Promotion</td>
<td>8</td>
<td>Change in job</td>
</tr>
<tr>
<td>Rehire</td>
<td>R</td>
<td>Hire/rehire</td>
</tr>
<tr>
<td>Return From Disability</td>
<td>22</td>
<td>Leave of absence</td>
</tr>
<tr>
<td>Return to Work</td>
<td>23</td>
<td>Leave of absence</td>
</tr>
</tbody>
</table>

Table 4.1 List of Events (Cont.)

<table>
<thead>
<tr>
<th>Event</th>
<th>Code</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspension</td>
<td>7</td>
<td>Available for manual use only</td>
</tr>
<tr>
<td>Termination</td>
<td>26</td>
<td>Termination</td>
</tr>
<tr>
<td>Transfer</td>
<td>6</td>
<td>Job and/or position transfer</td>
</tr>
<tr>
<td>Add Global Assignment</td>
<td>GA</td>
<td>Global assignment</td>
</tr>
<tr>
<td>End Global Assignment</td>
<td>EGA</td>
<td>Global assignment</td>
</tr>
<tr>
<td>Away on Global Assignment</td>
<td>AGA</td>
<td>Global assignment</td>
</tr>
<tr>
<td>Back from Global Assignment</td>
<td>BGA</td>
<td>Global assignment</td>
</tr>
<tr>
<td>Obsolete</td>
<td>OGA</td>
<td>Global assignment</td>
</tr>
<tr>
<td>Start Pension Payout</td>
<td>SPP</td>
<td>Pensions payouts</td>
</tr>
<tr>
<td>Discard Pension Payout</td>
<td>OPP</td>
<td>Pensions payouts</td>
</tr>
<tr>
<td>End Pension Payout</td>
<td>EPP</td>
<td>Pensions payouts</td>
</tr>
<tr>
<td>Start Contingent Worker</td>
<td>SCWK</td>
<td>Contingent Workforce Management</td>
</tr>
<tr>
<td>End Contingent Worker</td>
<td>ECWK</td>
<td>Contingent Workforce Management</td>
</tr>
</tbody>
</table>

Table 4.1  List of Events (Cont.)

Before you can use an event, it must have at least one Event Reason created; we will cover how to create Event Reasons in the next section. Typically, most processes require the system to be configured to read the appropriate event and Event Reasons or for Event Reasons to be selected manually. In some instances, events exist that either need to be assigned manually by an HR administrator or are legacy events (those marked as “Available for manual use only” in Table 4.1).

The events and Event Reasons selected are stored in an employee’s history and can be viewed by users with appropriate permissions to view the history of the Job Information or Compensation Information portlets. This can be seen in Figure 4.2.

Typically, around half of Employee Central customers use Event Derivation in order to have the system automatically select the event and Event Reason based on the action performed by the user. This can be extremely useful for customers that use MSS, in which having the user select the correct Event Reasons has an
Events and Workflows

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impact on data integrity, triggering the correct workflow, and in some cases trig-
gerating integrations to external systems. We will cover Event Derivation in Section 4.2.2.

Figure 4.2 Compensation Information History for Marcus Hoff

Customers can choose to have users manually select the event and Event Reason instead when performing an action in the system.

Now, let’s take a look at how Event Reasons are managed in Employee Central.

4.2.1 Event Reasons

An Event Reason describes why an event has occurred. For example, Resignation may be the reason for which a Termination event has occurred. For every event that occurs in the system, an Event Reason must be selected. As described in Section 4.1.2, an Event Reason can also change the employee status of an employee.

Although you cannot create events, you can create an infinite number of Event Reasons in the system. Event Reasons are Foundation Objects (we will cover Foundation Objects in detail in Chapter 6) and are therefore created in OneAdmin in Employee Files • MANAGE DATA. Figure 4.3 shows an example of an Event Reason in the Manage Organization, Pay and Job Structures screen.

SuccessFactors provides 178 Event Reasons that you can import into the system, although these Event Reasons do not need to be uploaded if you wish to start from scratch or you can only use a selected number of the provided Event Reasons.

Table 4.2 provides a small selection of Event Reasons, their events, and the assigned employee status for some of the standard provided Event Reasons. As we discussed in Section 4.1.2, not all Event Reasons have an employee status assigned and this is reflected in the table.

Table 4.2 List of Event Reasons

<table>
<thead>
<tr>
<th>Event Reason</th>
<th>Event</th>
<th>Employee Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal International Transfer</td>
<td>Hire</td>
<td>Active</td>
</tr>
<tr>
<td>Loan from Parent Company</td>
<td>Hire</td>
<td>Active</td>
</tr>
<tr>
<td>New Hire</td>
<td>Hire</td>
<td>Active</td>
</tr>
<tr>
<td>Family and Medical Leave Act</td>
<td>Leave of Absence</td>
<td>Unpaid Leave</td>
</tr>
<tr>
<td>Long Term Disability</td>
<td>Leave of Absence</td>
<td>Unpaid Leave</td>
</tr>
</tbody>
</table>
Event Reasons come into play whenever a change occurs in any fields in either the Job Information or Compensation Information portlets, or when certain transactions run. Such changes can occur through using the Take Action option and selecting Change Job and Compensation Info (typically an MSS activity) or Termination, or by inserting a new record in the History screen of either the Job Information portlet or the Compensation Information portlet (typically a HR administrator activity). The New Hire and Rehire transactions also involve selecting Event Reasons.

When a new employee is hired, the user can select any Event Reason created for the Hire event. The same is true for a Rehire transaction and Event Reasons created for the Rehire event.

<table>
<thead>
<tr>
<th>Event Reason</th>
<th>Event Reason</th>
<th>Employee Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unpaid Maternity/Paternity Leave</td>
<td>Leave of Absence</td>
<td>Unpaid Leave</td>
</tr>
<tr>
<td>Paid Maternity/Paternity Leave</td>
<td>Leave of Absence</td>
<td>Paid Leave</td>
</tr>
<tr>
<td>Lump Sum Merit Increase</td>
<td>Pay Rate Change</td>
<td></td>
</tr>
<tr>
<td>Merit</td>
<td>Pay Rate Change</td>
<td></td>
</tr>
<tr>
<td>Promotion</td>
<td>Pay Rate Change</td>
<td></td>
</tr>
<tr>
<td>Job Reclassification</td>
<td>Pay Rate Change</td>
<td></td>
</tr>
<tr>
<td>Normal Retirement</td>
<td>Termination</td>
<td>Retired</td>
</tr>
<tr>
<td>Vol Termination—Health Reasons</td>
<td>Termination</td>
<td>Terminated</td>
</tr>
<tr>
<td>Inv Termination—Insubordinate</td>
<td>Termination</td>
<td>Terminated</td>
</tr>
<tr>
<td>Vol Termination—Personal</td>
<td>Termination</td>
<td>Terminated</td>
</tr>
<tr>
<td>Inv Termination Non-Performance</td>
<td>Termination</td>
<td>Terminated</td>
</tr>
<tr>
<td>Transfer—Department Change</td>
<td>Transfer</td>
<td></td>
</tr>
<tr>
<td>Reorganization</td>
<td>Transfer</td>
<td></td>
</tr>
</tbody>
</table>

Table 4.2 List of Event Reasons (Cont.)

Event Reasons come into play whenever a change occurs in any fields in either the Job Information or Compensation Information portlets, or when certain transactions run. Such changes can occur through using the Take Action option and selecting Change Job and Compensation Info (typically an MSS activity) or Termination, or by inserting a new record in the History screen of either the Job Information portlet or the Compensation Information portlet (typically a HR administrator activity). The New Hire and Rehire transactions also involve selecting Event Reasons.

When a new employee is hired, the user can select any Event Reason created for the Hire event. The same is true for a Rehire transaction and Event Reasons created for the Rehire event.

The Termination action enables the user to select the appropriate Event Reason from those created for the Termination event (see Figure 4.4).

Event Reasons for the Termination events always link to the Job Information record and are viewable in the History screen of the Job Information portlet. The Event Reason for the Termination event also appears in the Employment Details portlet, as shown in Figure 4.5. The Event Reason for the Compensation Information will remain unchanged from the last change made prior to the termination.

Now that we’ve looked at when Event Reasons are used, we’ll examine at the process of creating Event Reasons.

As mentioned previously, Event Reasons are created in OneAdmin in Employee Files • Manage Organization, Pay and Job Structures. Remember, at some point in the future Event Reason objects will migrate to the MDF, at which time
they will be created in **Employee Files \· Manage Data** using a slightly different process from the one that we will discuss here.

**Employment Details**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire Date</td>
<td>04/25/2013</td>
</tr>
<tr>
<td>Original Start Date</td>
<td>04/25/2013</td>
</tr>
<tr>
<td>Seniority Start Date</td>
<td>04/25/2013</td>
</tr>
<tr>
<td>Eligible for Stock</td>
<td>No</td>
</tr>
<tr>
<td>Termination Date</td>
<td>05/04/2015</td>
</tr>
<tr>
<td>Termination Reason</td>
<td>Vol Resignation to Competitor (TERVCOMP)</td>
</tr>
<tr>
<td>OK to Retire</td>
<td>No</td>
</tr>
<tr>
<td>Payroll Due Date</td>
<td>05/04/2015</td>
</tr>
<tr>
<td>Last Date Worked</td>
<td>05/04/2015</td>
</tr>
<tr>
<td>Eligible for Salary</td>
<td>No</td>
</tr>
<tr>
<td>Status</td>
<td>No</td>
</tr>
<tr>
<td>Seniority End Date</td>
<td>05/04/2015</td>
</tr>
<tr>
<td>Benefits End Date</td>
<td>05/04/2015</td>
</tr>
<tr>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>Time Account Balance as of Termination Date</td>
<td></td>
</tr>
<tr>
<td>Vacation</td>
<td>15 days available</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>10 days available</td>
</tr>
</tbody>
</table>

![Figure 4.5 Employment Details Portlet for a Terminated Employee](image)

To create a new Event Reason, select **Event Reason** from the list in the **Create New** dropdown. Enter the start date in the **Effective as of** date field (typically 01/01/1900), and then enter values for the following remaining fields, which can be seen in Figure 4.3:

- **Event Reason ID**
  - The Event Reason code.
- **Event Reason Name**
  - The name of the Event Reason.
- **Description**
  - An optional description of the Event Reason.
- **Status**
  - Whether the Event Reason is **Active** or **Inactive**.

**Figure 4.5 Employment Details Portlet for a Terminated Employee**

- **Event**
  - The event for which the Event Reason is created.
- **Employee Status**
  - The employee status of the employee after the event has occurred.
- **Follow-Up Activity in Position**
  - For a Position Management-related Event Reason, this determines if a **Position Reclassification** or **Position Transfer** action should occur.
- **Payroll Event**
  - Used for integration to SAP ERP Payroll and Employee Central Payroll systems; enables a **Payroll Event** from one of these systems to be replicated instead of the event of the Event Reason.
- **Display in Internal Job History Portlet**
  - Used to indicate if Job Information records using this Event Reason should show on the Internal Job History portlet in the Employee Profile.

**Event Reason ID**, **Status**, and **Event** are mandatory fields. If you are not using Event Derivation, then the **Employee Status** field must be left blank.

As a minimum, you should create Event Reasons for the following events:

- **Hire**
- **Rehire**
- **Termination**
- **Leave of Absence and Return to Work** (if Leave of Absence is used)
- **Data Change**

Once created, an Event Reason is available for use in the system. For Event Derivation, additional configuration is required, which we will cover in the next section of this chapter.

Event Reasons can be restricted by country by creating an association between the Event Reason Foundation Object and the Country Generic Object. Once the association exists, each Event Reason can be assigned to one or more countries. The Event Reason will then only be available for employees of a company that has the associated country assigned to it.
4.2.2 Event Derivation

Event Derivation—technically known as the youCalc event rules—is a feature in Employee Central that enables the event and Event Reason to be derived automatically within MSS depending on what field changes the user makes. This significantly reduces user error, which can impact data accuracy and integrity, the Job History portlet on the Employee Profile, and integrations triggered by the Event Reason.

Although Event Reasons are selected automatically with Event Derivations, any user with the appropriate permissions can manually change them in the History screen of the Job Information and Compensation Information portlets. Additionally, during a Termination action the user must still manually select and Event Reason for the Termination.

Event Derivation triggers when data changes via using the Take Action option and selecting Change Job and Compensation Info. Any data changed in the Job Information, Job Relationships, or Compensation Information portlets triggers Event Derivation, although Event Reasons are not stored for changes to Job Relationships; they are merely cosmetic in nature when triggering a workflow.

Event Derivation is triggered by configurable rules. Until the Q2 2015 release, it was only possible to configure Event Derivation in the rules XML file uploaded in Provisioning. From the Q2 2015 release, customers have the option to have Event Derivation rules configured and triggered using the Rules Engine. We cover the Rules Engine in detail in Chapter 5, although we will look at configuring Event Derivation with the Rules Engine a little later in this section.

Important!

Customers can use either XML-based rules or Rules Engine rules for Event Derivation; a customer cannot use a combination of both. If a customer uses XML-based rules and wishes to use the Rules Engine, that customer must have the new method enabled in Provisioning and then recreate all Event Derivation trigger rules in the Rules Engine.

Once a change has been submitted—or if workflow is used, once the change has been approved by the last approver—the change is made to the employee data and the event and Event Reason are recorded against the change in the database. As mentioned previously, the event and Event Reason are then viewable in the History screen of the relevant portlet.

When using workflow, the Event Reason will be shown in the Please confirm your request box that displays once the Submit button is clicked (see Figure 4.7 ahead).

Let’s take a look at how this works in practice. In Figure 4.6, the user selected the Change Job and Compensation Info action for an employee and changed the Department from Marketing to Alliances.

Next, the user scrolls to the bottom and clicks the Submit button. The workflow popup box (Please confirm your request) opens (Figure 4.7). In this box, you can see the Event Reason for the change: Transfer—Department Change.

Subsequent workflow approval screens, like the screen shown in Figure 4.8, display the Event Reason.
Events and Workflows

Now that we’ve looked at how an Event Derivation works, we’ll take a look at enabling and then configuring Event Derivation.

Configuring Event Derivation Rules

Event Derivation rules are configured in the Rules Engine, but some existing customers may have their rules configured in the legacy method via the rules XML. Customers may migrate to the Rules Engine-based Event Derivation at any time, but must consider that this requires building all of the existing rules in the Rules Engine manually.

Note

We will only cover configuring Event Derivation rules using the Rules Engine in this chapter. An experienced implementation consultant should handle changes to XML-based rules until you have migrated to Event Derivation using the Rules Engine.

Two steps are required to configure an Event Derivation rule:

1. Create a business rule that defines the Event Derivation trigger and the output Event Reason.
2. Assign the business rule to the appropriate portlet (Job Information or Compensation Information) on which it should trigger.

Let’s run through these steps in detail. First, navigate to Employee Files / L54263 / Configure Business Rules in OneAdmin to create the rule. Create a new business rule for the specific portlet (e.g., Job Information). The IF conditions should stipulate the trigger rules, whereas the THEN condition should set the \textit{wfConfig} field to equal the Event Reason you wish to apply.

Let’s take a look at a rule example. In Figure 4.9, you can see a business rule that sets the Event Reason field to \textit{Transfer—Department Change}. The IF condition is set to \textit{Department.Value} is not equal to \textit{Department.Previous Value}, so that field will trigger whenever the Department field value is changed in an employee’s Job Information.

Once created, a business rule must be assigned to either the Job Information portlet or the Compensation Information portlet as an onSave event in OneAdmin via Company Settings / Manage Business Configuration.

Figure 4.10 shows our rule assigned to the Department field in Manage Business Configuration.
Once the field is added, save your changes, and your Event Derivation trigger is complete!

**Additional Resources**

For more information on configuring and using Event Derivation, refer to the section *Using MDF-Based Business Rules of the Employee Central Master handbook* found at [http://help.sap.com/hr_ec](http://help.sap.com/hr_ec).

Now that we’ve covered events and Event Reasons, let’s turn our attention to workflows.

### 4.3 Workflows

Whereas Event Reasons define the reason behind a particular action or event, workflows provide the mechanism to ensure that such actions, events, or employee master data changes are adequately approved and auditable. Most organizations—including yours—use some form of approval chain for certain actions or data changes, and Employee Central has a robust framework to manage workflow approvals. Refer back to Figure 4.8 for an example of a workflow in flight.

Workflows approvals have one or more approvers assigned, and the workflow will route through each approver in order until the last approver has approved the workflow. At that point, the changes that are subject to the workflow become visible in the system (future-dated changes will be visible in History but won’t become active until the effective date of the change is reached). We recommend that you keep your workflows simple, rather than creating large approval chains. The more workflows that have more approvers, the less likely it is for these workflows to receive approval as time goes on.

In addition to approvers, workflows can also have contributors and/or CC users. Contributors have the ability to view a workflow and to add comments to the workflow while it is active. CC users receive a notification upon the approval of a workflow. For each of these groups—approvers, contributors, and CC users—there are a number of different approver types available, which we will discuss when look at the Workflow Configuration. These approver types enable the system to derive the recipient of the workflow, such as the employee’s manager or the employee’s HR manager.
Workflows can be triggered on Generic Objects, effective-dated Foundation Objects, the New Hire, Rehire, and Internal Hire transactions, changes made to portlets on the EMPLOYMENT INFORMATION screen using the TAKE ACTION menu (including Global Assignments), or by using the EDIT button on the following portlets on the PERSONAL INFORMATION screen:

- **National ID Information**
- **Personal Information** (including Global Information fields)
- **Address Information**
- **Payment Information**
- **Dependents Information**

The Biographical Information, Work Permit Information, Contact Information, or Primary Emergency Contact portlets on the Personal Information screen do not support workflows.

Workflows also will not trigger when inserting or correcting a record on the History screen of a portlet.

Figure 4.11 shows the triggering of a workflow after making a change on the CHANGE JOB AND COMPENSATION INFO screen, accessed via the TAKE ACTION button on either the PERSONAL INFORMATION or EMPLOYMENT INFORMATION screen. By clicking the VIEW WORKFLOW PARTICIPANTS button, the user can see all of the approvers of the workflow before submitting it, as shown in Figure 4.11. The user also can add a comment.

Workflows, like Event Reasons, are Foundation Objects and are configured in OneAdmin in EMPLOYEE FILES - MANAGE ORGANIZATION, PAY AND JOB STRUCTURES. We will cover this process in Section 4.3.3. Workflow trigger rules are set up in the Rules Engine, although as with Event Derivation they used to be configured in an XML rules file prior to the Q2 2015 update. We will cover this in Section 4.3.4.

### 4.3.1 Approver Groups

In this section, we will discuss the two approver groups used in workflows: Dynamic Roles and Workflow Groups, and how they can be used to identify approvers, contributors, and notified individuals.

#### Dynamic Roles

Dynamic Roles dynamically determine the recipient, contributor, or CC role of an individual based on defined organizational attributes. For example, you may create a Dynamic Role called Compensation Manager through which you define the person responsible for approving compensation changes for each division. Figure 4.12 shows an example of a Dynamic Role.

The default attributes available for Dynamic Roles include the following:

- Company
- Business Unit
- Division
- Department
- Location
- Cost Center
- Job Classification
- Pay Grade
You can add other Foundation Objects, such as Event Reasons and custom Foundation Objects.

For each attribute or combination of attributes selected, an approver is selected by approver type. There are three approver types:

- **Person**
- **Position**
- **Dynamic Group**

You can only use Dynamic Roles in workflows used for Employee Central objects and the Position object.

Dynamic Roles are Foundation Objects and therefore are created in OneAdmin in EMPLOYEE FILES • MANAGE ORGANIZATION, PAY AND JOB STRUCTURES. Use the CREATE NEW dropdown to create a new Dynamic Role, define the ID and name, and then select the various different attributes for each approver. In Figure 4.13, we created a new Dynamic Role called **Benefits Coordinator**. Here, we will define different approvers if the employee’s organization assignment matches the following attributes:

- **Division is Enterprises** and **Location is Arlington, Virginia**
- **Division is Enterprises and Location is Atlanta**
- **Division is Healthcare**

**Figure 4.13  Creating a Dynamic Role**

For each of these attributes, define an approver type and approver. Here, we will define a person for each attribute (see Figure 4.14).

**Figure 4.14  Assigning Approvers to Attributes in a Dynamic Role**
Now, click **Save**, and the Dynamic Role is created; you can see the result in Figure 4.15.

**Figure 4.15** Benefits Coordinator Dynamic Role

Now that we've looked at Dynamic Roles, let's take a look at Workflow Groups.

**Workflow Groups**

Workflow Groups—also known as Dynamic Groups—are groups of individuals that all receive a workflow simultaneously. All members of a Workflow Group have the ability to approve the workflow, and the workflow will be available for approval for all group members until the first group member approves it. Once approved, the workflow is no longer available for approval by other group members. Figure 4.16 shows a Workflow Group.

You create Workflow Groups in the same way as Permission Groups, which we discussed in Chapter 3, Section 3.2.1. They use the same set of fields to include and exclude members.

Workflow Groups are also used for contributors and CC roles. For contributors, all members in the group will be able to comment on a workflow until it is approved. For CC roles, all members of the group will receive notification of the workflow approval.

To create a Workflow Group, go to OneAdmin and select **Employee Files • Manage Workflow Groups**. Click the **Create Group** button, enter the group name, and then select the inclusion and exclusion criteria as you would when creating a Permission Group. Click **Done** to save the group.

**Figure 4.16** Workflow Group for the US HR Analyst Team

Now that we’ve looked at Dynamic Roles and Workflow Groups, it’s time to look at the Workflow Configurations themselves.

### 4.3.2 Workflow Configurations

Workflows are defined by Workflow Configurations, which are Foundation Objects. Technically, a workflow is made up of several Foundation Objects:

- Workflow Configuration (**wfConfig**)
- Workflow Step Approver (**wfStepApprover**)
- Contributor Type (**wfConfigContributor**)
- CC Role Type (**wfConfigCC**)

A Workflow Configuration is broken up into four sections, represented by the objects just listed. These sections are as follows:
Events and Workflows

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Workflow attributes

- **Approvers**
- **Contributors**
- **CC roles**

Figure 4.17 shows a Workflow Configuration for a Promotion workflow.

Figure 4.17 Promotion Workflow Configuration

In the sections that follow, we will look at each of these workflow sections in greater depth, including descriptions of both Foundation Object workflows and Generic Object workflows.

**Workflow Attributes**

The attributes used to define a Workflow Configuration and its overall behavior (not approval flow) are as follows:

- **ID**
  The unique identifier for the Workflow Configuration.

- **Name**
  The name of the workflow.

- **Description**
  An optional description of the workflow.

- **Remind in Days**
  The number of days after which a reminder notification is sent to the current approver of a workflow (a reminder is sent on a recurring basis based on the value of the field). The Remind in Days field is used if a reminder email should be sent by the system to the current approver of the workflow after a certain period if no action has been taken on the workflow. The value should be the number of days after which an email reminder is sent. A reminder email is sent every number of days until action is taken on the email. We will cover this in more detail in Section 4.3.7.

- **Is Delegate Supported**
  Determines whether a user can set up a workflow to be manually delegated or to be autodelegated in his or her To Do homepage tile. Is Delegate Supported is a Boolean field that enables the Auto Delegation option and the Delegate option for approvers of a workflow. We will cover this in more detail in Section 4.3.8.

- **Alternative Workflow**
  Defines the workflow to use if a future-dated transaction already exists. For example, you are making a Job Information change for an employee on July 1, 2016. A Job Information change record already exists for August 1, 2016. In this scenario, it is possible to trigger a different workflow so that alternative approvers can approve the workflow. This could be desired so that HR administrators can review the change before it is approved, so that no duplicates or contradicting changes are made that are already in the future-dated record.

- **Redirect CC Users Workflow Approval Page**
  Defines if CC users can access the workflow approval page or if they just get a notification.

**Approvers**

In this part of the Workflow Configuration, each approver step is defined. Every approver step must be approved before the workflow is approved. If the workflow cannot derive an approver, then the step is skipped, and if no approv-
ers can be derived, then the workflow is automatically approved. For each approver step, there are several attributes to configure:

- **Approver Type**
  - **Role:** A specific Approver Role
  - **Dynamic Role:** An individual will be derived based on the criteria of the Dynamic Role
  - **Dynamic Group:** A Workflow Group
  - **Position:** The holder or holders will be selected

- **Approver Role**
  - Dependent on the Approver Type. Use the Approver Role field to select the value of the Role, Dynamic Role, Workflow Group, or Position once the Approver Type is selected. When Dynamic Role, Workflow Group, or Position is selected in the Approver Type field, the Approver Role field values will be a list of the respective objects. If Role is selected as the value of the Approver Type field, then the Approver Role field will provide the following list of approver roles that are used to derive the approver based on the employee who is the subject of the workflow:
    - **Self:** The individual that initiated the request
    - **Manager:** The manager of the employee
    - **Manager's Manager:** The manager of the manager of the employee
    - **Employee HR:** The HR manager of the employee (as defined in the Job Relationships portlet on the Employment Information screen)
    - **Matrix Manager:** The matrix manager of the employee (as defined in the Job Relationships portlet on the Employment Information screen)
    - **Custom Manager:** The custom manager of the employee (as defined in the Job Relationships portlet on the Employment Information screen)
    - **Second Manager:** The second manager of the employee (as defined in the Job Relationships portlet on the Employment Information screen)
    - **Additional Manager:** The additional manager of the employee (as defined in the Job Relationships portlet on the Employment Information screen)

If an Approver Role is set as an approval step in a workflow but no user is assigned, then that step of the workflow will be skipped. For example, the approval step will be skipped if Employee HR is set as the Approver Role in a workflow but the employee who is the subject of the workflow doesn’t have an HR manager assigned.

- **Context**
  - Determines whether this is the current Approver Type (Source) or future Approver Type (Target); only triggers if the approver changes as part of the data changes that trigger the workflow. Use the Context field when the value that is changed in the transaction is an Approver Role (excluding Self). There are two options:
    - **Source**
    - **Target**

For example, an employee’s manager changes. If the Approver Role field value is Manager and the Context field value is Source, then the employee’s current manager is selected as the approver. If the Approver Role field value is Manager and the Context field value is Target, then the employee’s proposed new manager is selected as the approver.

- **Edit Transaction**
  - Determines whether the approver can edit data that is part of the workflow (Edit without Route Change), can edit the data and have the workflow reroute all the way through the approver chain (Edit with Route Change), or cannot edit any data (No Edit).

- **Relationship to Approver**
  - Determines whether the Approver Type is related to the initiator of the workflow (Initiator) or the subject of the workflow (Employee).

- **No Approver Behavior**
  - What should happen if the workflow reaches an approver that cannot be derived (e.g., a position with no incumbent, an employee has no manager, the employee's manager has no manager, there is no HR manager assigned, etc.); either the step is skipped (Skip this Step), or the workflow is cancelled (Stop the Workflow).
Events and Workflows

Before we move onto the workflow creation process, let’s take a look at Foundation Object and Generic Object workflows.

Foundation Object and Generic Object Workflows

Foundation Object workflows have some limitations compared to workflows used for Personal Information or Employment Information data changes. Workflows used for Foundation Objects only support Dynamic Group and Position as values for the Approver Type and Contributor Type fields. For CC users, the only values available for the CC Role Type fields are Dynamic Group, Position, Person, and External Email.

You cannot edit or update active workflows. If the changes made by the initiator are incorrect, then the workflow must be rejected and the correct changes made by the initiator.

Workflows for Generic Objects do not support Dynamic Role as an Approver Type, Contributor Type, or CC Role Type. However, there is an exception for a Position object.

Next, we will look at an example while walking through the workflow creation process.

4.3.3 Creating a Workflow

Now that we’ve reviewed the various options available when creating a workflow, let’s take a moment to look at an example of creating a workflow in action.

For our example, let’s create a workflow for an employee change of position. In our workflow, we want four approvers: current HR representative, new HR representative, new manager, and the new manager’s manager. We also want to notify the current manager and notify the IT helpdesk via its shared email inbox. The workflow should also have a three-day reminder.

First, let’s define the attributes. These include the ID, name, and description of our workflow and the reminder, delegation, alternative workflow, and CC user redirection page. With exception of the reminder, let’s use the default values. Figure 4.18 shows the attributes for our workflow, including the three-day reminder.
In a similar process, define the CC users, which are the current manager and the IT Helpdesk shared email inbox. Figure 4.20 shows the configured CC users.

Once you’ve finished the configuration, click the Save button to save the workflow. Figure 4.21 shows what our completed workflow looks like.
4.3.4 Creating and Assigning Workflow Triggers

No matter on which type of field or object the workflow is triggered, a business rule defines the trigger rule(s). The process is similar to creating business rules for Event Derivation. The key difference when creating a business rule to trigger a workflow is that the THEN condition should always set the wfConfig field of the base object to be the workflow configuration that will be triggered (for a Model object, it should be wfConfig.Value). Figure 4.22 shows an example of this type of business rule for an address change.

In order to compare new values to previous values for a field (i.e., identify if there has been a change), use the model version of a base object. For example, to compare address fields to determine change, use the ADDRESS MODEL base object instead of the ADDRESS base object.

Figure 4.22 Workflow Trigger Rule Example

We’ll now look at the process of assigning workflows to trigger on different objects.

Personal Information and Employment Information Triggers

Workflows triggered on changes to Personal Information portlets using the Edit button or to Employment Information portlets using the TAKE ACTION menu (including Global Assignments and Pensions Payouts) use Workflow Derivation, the same process that is used for Event Derivation. As with Event Derivation, workflows were triggered historically by creating rules in an XML file.

Important!

Just like with Event Derivation, customers can only use either the XML-based workflow rules or the Rules Engine rules—not a combination of both. If a customer currently uses XML-based workflow rules and wishes to use the Rules Engine, the customer must have the new method enabled in Provisioning and must then recreate all workflow trigger rules in the Rules Engine.

Business rules created for Workflow Derivation are assigned the same way as business rules created for Event Derivation, in OneAdmin in COMPANY SETTINGS • MANAGE BUSINESS CONFIGURATION. Assign these rules to the appropriate portlet as required.

Many workflows trigger based on specific Event Reasons, so the IF conditions of a business rule to trigger a workflow can reference an Event Reason, just like the New Hire example seen in Figure 4.23. These business rules are assigned immediately after the Event Derivation business rule on the MANAGE BUSINESS CONFIGURATION screen.

New Hire and Rehire

Workflows for New Hire or Rehire are assigned to the Job Information portlet in OneAdmin in COMPANY SETTINGS • MANAGE BUSINESS CONFIGURATION. A business rule for triggering a workflow for New Hire or Rehire should use the Job Information base object and have the IF conditions check if the EVENT REASON field is equal to any Event Reasons that you have configured in your system for hire or rehire. Figure 4.23 shows an example of a New Hire workflow trigger.
Foundation Object Triggers

Foundation Objects can trigger workflows, whether traditional Foundation Objects or Foundation Objects that have been migrated to the MDF as Generic Objects. For Foundation Objects that have been migrated to the MDF, refer to the following section on Generic Object triggers. In this section, we will focus on traditional Foundation Objects.

Workflows for Foundation Objects trigger whenever an object is created, modified, or deleted. It is not possible to trigger a workflow on just one of these actions; a workflow will trigger on each of these actions as per the IF conditions defined in the business rule.

Business rules created for Foundation Objects require adding a parameter in order to define the workflow configuration. To do this when creating a new business rule, follow these steps:

1. Select the base object in the Base Object field.
2. Click the Manage Parameters hyperlink.
3. In the Code column, enter the value “FOWorkflow.”
4. Enter a name in the Name column; this will be relevant later.
5. In the Object dropdown, select FO Workflow.
6. Click Apply.

Prior to clicking the APPLY button, the MANAGE PARAMETERS window should look like Figure 4.24.

After completing the rest of the business rule information, configure the THEN condition to set the Workflow Configuration. Select Set in the first dropdown, and click the + button next to the name you defined in step 4 in the second dropdown and select the field Workflow Information. Select the Workflow Configuration, and click the SAVE button. Your business rule will look similar to that shown in Figure 4.25.
Workflows for Foundation Objects must have the business rule assigned to the object in the Corporate Data Model as an onSave event. An implementation consultant typically performs this process.

**Generic Object Triggers**

For Generic Objects—including Foundation Objects that have been migrated to the MDF and Time Off objects—create a business rule per the Personal Information or Employment Information workflows and assign it to the Object Definition.

Assign business rules created to trigger workflows to the object definition under Rules as a validateRules event. This might look like the example shown in Figure 4.26.

![Figure 4.26 Business Rule Assigned to the MDF Object](image)

Chapter 5 covers assigning business rules to Generic Objects.

### 4.3.5 Workflow Notifications

Once a workflow is triggered, an approver is notified of the workflow by email. In addition, the user can see the workflow listed in the To Do portlet on the homepage and also in the Pending Request screen in Employee Files. Depending on permissions, a user browsing the Personal Information or Employment Information screens of an employee subject to a workflow may see a notification in the portlet(s) on which the workflow was triggered. We’ll take a look at each of these notification possibilities.

**Email Notifications**

Email notifications are sent out automatically for a variety of workflow-related actions, including approvals, rejections, pending, comments, delegations, and more. We’ll cover all of these shortly. You cannot turn off email notifications for workflows.

Manage email notifications in OneAdmin in Company Settings • E-Mail Notification Templates Settings. There are fifteen email notification templates used by the system, as described in Table 4.3.

<table>
<thead>
<tr>
<th>Workflow Email Notification Template</th>
<th>Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow Action Approval Notification</td>
<td>Workflow requires approval</td>
</tr>
<tr>
<td>Workflow Action Rejected Notification</td>
<td>Workflow has been rejected</td>
</tr>
<tr>
<td>Workflow Action Pending Notification</td>
<td>Reminder for pending workflow</td>
</tr>
<tr>
<td>Workflow Action Cancelled Notification</td>
<td>Workflow has been cancelled</td>
</tr>
<tr>
<td>Workflow Action Skipped Notification</td>
<td>Workflow has been skipped</td>
</tr>
<tr>
<td>Workflow Comment Posted Notification</td>
<td>Comment has been posted to workflow</td>
</tr>
<tr>
<td>Workflow Action Lock Down Notification</td>
<td>Workflow has been locked down by an administrator</td>
</tr>
<tr>
<td>Workflow Action Unlock Notification</td>
<td>Workflow has been unlocked by an administrator</td>
</tr>
<tr>
<td>Workflow Action Contributor Notification</td>
<td>Recipient is a contributor to a workflow that has been submitted for approval</td>
</tr>
<tr>
<td>Workflow Action Cc Role Notification</td>
<td>Notification that workflow has been approved</td>
</tr>
<tr>
<td>Workflow Step Approved Notification</td>
<td>Workflow step has been approved</td>
</tr>
<tr>
<td>Workflow Sentback Notification</td>
<td>Workflow has been sent back to initiator by an approver</td>
</tr>
</tbody>
</table>

Table 4.3 Workflow Email Notification Templates
You can modify any email notification template, and can change the following attributes:

- Priority
- Subject
- Body

Table 4.3  Workflow Email Notification Templates (Cont.)

The email subject and email body are configurable for each enabled language. Figure 4.27 shows an example of the WORKFLOW ACTION APPROVAL NOTIFICATION workflow email template.

As you can see in Figure 4.27, variable codes can insert dynamically determined values into the email that the template generates. Table 4.4 lists common variable codes used for workflow email notifications.

<table>
<thead>
<tr>
<th>Variable Code</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>[[HRIS_ACTION]]</td>
<td>Type of action</td>
</tr>
<tr>
<td>[[ACTION_TYPE]]</td>
<td>Type of action for Foundation Object workflows</td>
</tr>
<tr>
<td>[[EVENT]]</td>
<td>Event for the action</td>
</tr>
<tr>
<td>[[EVENT_REASON]]</td>
<td>Event Reason for the action</td>
</tr>
<tr>
<td>[[EFFECTIVE_DATE]]</td>
<td>Date that the data change/action will be effective</td>
</tr>
<tr>
<td>[[VIEW_LINK]]</td>
<td>Hyperlink to the workflow approval page</td>
</tr>
<tr>
<td>[[SUBJECT_USER]]</td>
<td>Employee who is the subject of the workflow</td>
</tr>
<tr>
<td>[[SUBJECT_USER_ID]]</td>
<td>User ID of the employee who is the subject of the workflow</td>
</tr>
<tr>
<td>[[PERSON_ID_EXTERNAL]]</td>
<td>External ID of the employee who is the subject of the workflow</td>
</tr>
<tr>
<td>[[SUBJECT_USER_LEGAL_ENTITY]]</td>
<td>Legal Entity of the employee who is the subject of the workflow</td>
</tr>
<tr>
<td>[[SUBJECT_USER_DEPARTMENT]]</td>
<td>Department of the employee who is the subject of the workflow</td>
</tr>
<tr>
<td>[[SUBJECT_USER_COSTCENTER]]</td>
<td>Cost Center of the employee who is the subject of the workflow</td>
</tr>
<tr>
<td>[[SUBJECT_USER_JOBCODE]]</td>
<td>Job Code of the employee who is the subject of the workflow</td>
</tr>
<tr>
<td>[[SUBJECT_USER_JOBTITLE]]</td>
<td>Job Title of the employee who is the subject of the workflow</td>
</tr>
<tr>
<td>[[RECIPIENT_NAME]]</td>
<td>Recipient of the email</td>
</tr>
</tbody>
</table>

Figure 4.27  Workflow Action Approval Notification Email Template

Table 4.4  Email Template Variable Codes
Figure 4.28 shows the email generated by the system for the Workflow Action Approval Notification email template.

### Table 4.4 Email Template Variable Codes (Cont.)

<table>
<thead>
<tr>
<th>Variable Code</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>[[CURRENT_OWNER]]</td>
<td>Current approver of the workflow or the user that rejected a workflow</td>
</tr>
<tr>
<td>[[APPROVAL_CHAIN]]</td>
<td>Workflow approval chain up to the current approver</td>
</tr>
<tr>
<td>[[CREATED_USER]]</td>
<td>User who initiated the workflow</td>
</tr>
<tr>
<td>[[CREATED_USER_EMAIL]]</td>
<td>Email of the user who initiated the workflow</td>
</tr>
<tr>
<td>[[CREATED_TIME]]</td>
<td>The date and time when the workflow was initiated</td>
</tr>
<tr>
<td>[[RECENTLY_APPROVED_BY]]</td>
<td>The most recent approver of the workflow</td>
</tr>
<tr>
<td>[[RECENTLY_APPROVED_BY_COMMENT]]</td>
<td>Any comments by the most recent approver of the workflow</td>
</tr>
<tr>
<td>[[RECENT_APPROVAL_DATE]]</td>
<td>The date of the most recent approval of the workflow</td>
</tr>
<tr>
<td>[[RECENT_COMMENT_POSTED]]</td>
<td>The comment that was posted on a workflow</td>
</tr>
<tr>
<td>[[RECENT_COMMENT_POSTED_BY]]</td>
<td>The date that the comment was posted by the user</td>
</tr>
<tr>
<td>[[REJECTED_BY_COMMENT]]</td>
<td>Comments by the user that rejected the workflow</td>
</tr>
<tr>
<td>[[DELEGATOR]]</td>
<td>User who is delegating the workflow</td>
</tr>
<tr>
<td>[[DELEGATEE]]</td>
<td>User who has been delegated the workflow</td>
</tr>
</tbody>
</table>

Now that we’ve looked at workflow notification emails, let’s take a look at how workflow notifications appear in the system itself.

### To Do Tile

The To Do tile on the homepage highlights a variety of outstanding tasks and notifications for a user, including workflow notifications. All workflows that require action by the user appear in the To Do tile with their due dates. Typically, the due date for workflows is TODAY. By selecting a workflow in the To Do tile, a user can view the workflow approval page. Figure 4.29 shows the To Do tile.
Pending Requests

The Pending Requests screen in the Employee Files menu provides workflow approvers and initiators—as well as contributors and individuals assigned as CC users—with the ability to view a variety of requests that they have submitted or are part of. The Pending Requests screen is broken up into four portlets:

- **Requests Waiting for My Approval**
  Submitted workflows that require approval by the user

- **Requests Still In Progress that I Approved**
  Active workflows that the user has approved

- **My Requests Waiting for Approval**
  Workflows that the user has submitted that are still active and waiting to be approved

- **My Notifications**
  Workflows for which the user is a CC user

Figure 4.30 shows the Pending Requests screen.

Access the Workflow Approval screen by clicking the appropriate hyperlink.

Portlet Notifications

If a user has the appropriate permissions, he or she will see a notification in a portlet in the Personal Information or Employment Information screens on which a workflow has been submitted. This looks like the example seen in Figure 4.31. Once the workflow is approved, this notification will disappear.

Figure 4.31 shows the Workflow Approval screen.
Now that we’ve covered how users are notified of workflow requests, let’s take a look at the approval process itself.

4.3.6 Workflow Approval Process

Once a workflow has been submitted and an approver notified, it’s time for the approver to approve the workflow. An approver accesses the workflow approval screen from the hyperlink found in the email notification, To Do tile, or Pending Requests screen. The workflow approval screen usually looks like the screen shown in Figure 4.32.

![Workflow Approval Screen](image)

The screen contains six areas (listed counter-clockwise):

- **Workflow Overview**
  Lists the Event Reason/action, initiator, date of submission, effective date of the action, and hyperlink to view the workflow participants.

- **Workflow Details**
  Shows the data changes made that are being approved in the workflow (subject to permissions, if configured).

- **Comment**
  Allows the approver or contributor to add comments to the workflow, which will appear in the Activity log.

- **Approval Options**
  Provides options for the approver to approve the workflow, cancel it or send it back to the initiator, delegate the workflow (if configured), or make changes to the data being approved (if configured), or for the initiator to withdraw the request. The approval options provide the approver with the ability to perform a number of actions on the workflow, some of which depend on the settings made on the Workflow Configuration covered in Section 4.3.2. These options include the following:
  - **Approve**: Approves the workflow step
  - **Send Back**: Sends the workflow back to the initiator
  - **Delegate**: Allows the user to delegate the workflow to another user
  - **Update**: Allows the user to make changes to the data being approved
  - **Withdraw**: Only available for the initiator; enables the initiator to cancel the workflow request

- **Activity**
  Displays a log of all activities on the workflow, such as comments, approvals, and delegations.

- **User who is subject of the workflow**
  Shows a brief overview about the user who is the subject of the workflow.

Once the approver has approved the workflow, it will move to the next approver in the approval chain. If the approver is the last approver in the approval chain, then the entire workflow is approved and the changes become active in the system.

Now, let’s take a look at setting reminders for workflows.
4.3.7 Setting Reminders

Email reminders can be set up in the system by setting a value in the Remind in Days field in the Workflow Configuration(s) for which you would like email reminders to be sent. When set with a value (in days), the system will send an email reminder to the current approver of the workflow after the number of days defined in this field if no action has been taken on the workflow. The system determines “action” as activities such as adding a comment, changing an approver, and approving the workflow.

The reminder email is sent again after the same number of days and will continue to be sent out for all workflows defined in the same configuration. For example, if the value of the Remind in Days field is set to 5, then a reminder email will be sent five days after the workflow has been received by the approver. A reminder email will then be sent to the approver every five days until action is taken on the workflow.

The content of reminder emails is sent using the Workflow Action Pending Notification email template. If the workflow is sent back to the initator and a reminder is triggered, the system will use the Workflow Sentback Notification email notification template. See Section 4.3.5 for details on workflow notifications.

In order to send reminder emails, a quartz job needs to be set up in Provisioning. Note that a global value can be set on the quartz job that is effective for all workflows, irrespective of what is put into the Remind in Days field of any workflow.

4.3.8 Delegation

Delegation of workflows is possible, enabling another user (delegatee) to receive and approve a workflow instead of the original approver (delegator). A delegatee can reject the delegation and return the workflow back to the delegator. Once a workflow has been delegated, it cannot be delegated further by the delegatee. If a delegatee becomes inactive (i.e., he or she is terminated or retires), then the delegation will be cancelled and the delegator will become the approver of any active workflows.

Delegated workflows appear in the delegate’s To Do tile and in the Pending Requests screen.

There are two types of delegation:

- Manual delegation
- Auto delegation

Enable both manual delegation and auto delegation for each workflow by setting the Is Delegate Supported field to Yes on the appropriate workflow configuration.

Let’s look at each type of delegation.

Manual Delegation

Manual delegation allows the delegator to manually delegate a workflow to a delegatee within the workflow approval screen by selecting the Delegate option at the bottom of the screen, as shown in Figure 4.32. The delegator selects the Delegate option and then selects the user to be the delegatee in the Delegate Request popup window, as shown in Figure 4.33. The delegator then clicks the Send button and is asked to confirm the action by clicking the Delegate button.

![Figure 4.33 Manually Delegating a Workflow](image)

After the delegator clicks the Delegate button, the delegatee will be made the approver of this step of the workflow, and a notification will be sent that the delegate has been delegated a workflow to approve. The email notification will use...
the Workflow Action Delegate Notification template. See Section 4.3.5 for details on workflow notifications.

**Auto Delegation**

*Auto delegation* automatically redirects an approver’s workflows to a specified delegatee. This could be useful for an executive delegating his or her workflows to an executive assistant or a manager delegating workflows while on vacation, for example. Auto delegation is effective for all workflow approvals required after it has been enabled by the delegator and is not effective for existing workflows that require approval by the delegator. Any active workflows need to be delegated manually by the approver.

Set up auto delegation with the AUTO DELEGATE option in the My Info Links part of the My Info tile on the homepage (accessed by clicking the cog icon on the My Info tile), as shown in Figure 4.34.

To cancel an auto delegation, select the AUTO DELEGATE option in the My Info Links part of the My Info tile on the homepage, uncheck the Delegate my approvals checkbox, and then click the SAVE button.

Now that we’ve covered delegation, let’s look at the workflow audit trail.

### 4.3.9 Workflow Audit Trail

You can view the workflow approval audit trail for data changes in the Address, Personal Information, Job Information, Job Relationships, and Compensation Information portlets by navigating to the History screen of the portlet, selecting the appropriate record, clicking the Take Action button, and selecting the View Approval History option. The View Approval History option only displays for records approved by a workflow. Figure 4.36 shows the workflow approval audit trail.

Now, let’s look at administering workflows.
4.3.10 Administering Workflows

There are several options in OneAdmin to administer workflows and associated configurations:

- **Manage Workflow Requests**
- **Manage Workflow Requests with invalid approvers**
- **Manage Workflow Groups**
- **Invalid User in Dynamic Role**
- **Manage Organization, Pay and Job Structures**
- **Manage Data (for Auto Delegate Configuration)**

Let’s briefly explore each of these options and their capabilities.

**Manage Workflow Requests**

The **Manage Workflow Requests** transaction provides administrators with the ability to administer active and inactive workflows in the system. It covers all workflows with a subject user (i.e., it does not show Foundation Object workflows). Access it from the Employee Files menu in OneAdmin. First, the **Manage Workflow Requests** transaction presents the user with the **Search Workflow Requests** popup, which enables the user to select the type of workflows that he or she wishes to view. Figure 4.37 shows the popup and all of the search criteria. At least one search criteria must be selected, and any combination can be used.

![Figure 4.37 Workflow Search Criteria](image)

The user can choose from the following search options:

- **Requested By**
  - Initiator of the workflow
- **Requested For**
  - The employee who is the subject of the workflow
- **Request Type**
  - The Event Reason that was triggered
- **Request Status**
  - The status of the workflow; choose from the following:
    - **Initialized**: This is unused
    - **Pending**: The workflow is pending approval
    - **Completed**: Approved workflows
    - **Rejected**: Rejected workflows
Events and Workflows

- CANCELLED: Cancelled workflows
- LOCKED: Locked workflows
- SENTBACK: Workflows that have been sent back
- EFFECTIVE DATE FROM and EFFECTIVE DATE TO
  Date that the changes become effective once approved
- REQUESTED START DATE and REQUESTED END DATE
  Date the workflow was initiated

If PENDING or SENTBACK is selected for the REQUEST STATUS, then a new field is displayed: STALLED FOR DAYS. This field allows the user to search for workflows that have been stalled for a specific number of days. The value entered is the minimum number of days for which a workflow has been stalled. For example, if you enter "20" as the value, any workflows that have been stalled for twenty days or more will be displayed.

Now, let's go through a quick example. If you wanted to search for all active workflows that were pending approval, you would open the REQUEST STATUS dropdown, select INITIALIZED, and click the SEARCH button.

After you enter search criteria and click the SEARCH button, you will see a list of workflows that meet the criteria. Figure 4.38 shows a list of workflows that meet the example criteria.

**Figure 4.38** Active Workflows in PENDING Status

The table of results has several columns, many of which are included in the search criteria. View the workflow by clicking the hyperlinked value in the REQUEST TYPE column. There also are two columns to the right side of the table:

- ACTIONS
  A list of actions to take on the workflow
- STALLED FOR DAYS
  The number of days for which the workflow has been stalled (i.e., no action has been taken)

There are several actions available for each workflow. When you click the TAKE ACTION button in the ACTION column, a menu of six options opens. When you select an option, you will see a popup box in which to take the action. The six options are as follows:

- LOCK DOWN
  Lock down the workflow so it is no longer active
- ADD ANOTHER APPROVER
  Add an additional approver to the workflow
- CHANGE APPROVERS
  Change the current and any subsequent approvers
- REMOVE APPROVERS
  Remove any approvers after the current approver (the current approver cannot be removed)
- ROUTE REQUEST
  Reroute the workflow to a future approver
- DECLINE
  Reject the workflow

Figure 4.39 shows an approver change in progress after selecting CHANGE APPROVERS.

**Figure 4.39** Changing a Workflow Approver
Manage Workflow Requests with Invalid Approvers

The MANAGE WORKFLOW REQUESTS WITH INVALID APPROVERS transaction located in the EMPLOYEE FILES menu in OneAdmin provides the user with a list of workflows that have an approver assigned who is no longer active in the system (i.e., the user has been terminated). Figure 4.40 shows the list of workflows with invalid approvers.

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Invalid Approver</th>
<th>Action</th>
<th>Requested By</th>
<th>Requested For</th>
<th>Requesting Name</th>
<th>Effective Date</th>
<th>Invalid For Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit Template - Sc</td>
<td>Wanda Lee</td>
<td>Take Action</td>
<td>Janice Jones</td>
<td>Wanda Lee</td>
<td>PENDING</td>
<td>03/31/2016</td>
<td>0</td>
</tr>
<tr>
<td>Purchase - Pay Check</td>
<td>Linda Lewis</td>
<td>Take Action</td>
<td>Richard Thompson</td>
<td>Linda Lewis</td>
<td>PENDING</td>
<td>02/10/2014</td>
<td>0</td>
</tr>
<tr>
<td>Termination</td>
<td>Steven Thomas</td>
<td>Take Action</td>
<td>Carla Garcia</td>
<td>Steven Thomas</td>
<td>PENDING</td>
<td>06/01/2016</td>
<td>0</td>
</tr>
</tbody>
</table>

Figure 4.40 Workflows with Invalid Approvers

The list looks similar to the list shown in MANAGE WORKFLOW REQUESTS. As in that transaction, view the workflow by clicking the hyperlinked value in the REQUEST TYPE column. The list of actions in the TAKE ACTION menu are also the same. By using this menu, you can change the invalid approver or reroute the workflow to the next approver in the chain.

Manage Workflow Groups

Manage Workflow Groups in the MANAGE WORKFLOW GROUPS transaction covered in Section 4.3.1.

Invalid User in Dynamic Role

The INVALID USER IN DYNAMIC ROLE transaction displays a list of all Dynamic Roles with an inactive user assigned as an approver. The transaction is located in the EMPLOYEE FILES menu in OneAdmin.

The list (shown in Figure 4.41) has two columns, one that displays the Dynamic Roles with invalid approvers and one that displays the invalid user(s) in the Dynamic Roles.

Clicking on the hyperlink of the Dynamic Role opens it, as shown in Figure 4.42. Here, the invalid approvers can be viewed and corrected.

Manage Organization, Pay, and Job Structures

Manage Workflow Configurations in the MANAGE ORGANIZATION, PAY AND JOB STRUCTURES transaction is covered in Section 4.3.3.

Manage Data (Auto Delegate Configuration)

Configurations for each auto delegation can be viewed, modified, and deleted in OneAdmin in EMPLOYEE FILES • MANAGE DATA. Select AUTO DELEGATE CONFIG as the object type in the SEARCH dropdown and a selectable list of users that have enabled auto delegation will appear in the subsequent column. The list displays users with both active and previous auto delegations.

Once loaded, you can modify the AUTO DELEGATION CONFIGURATION to add, modify, or remove an auto delegation. Figure 4.43 shows an example of an auto delegation enabled for Alexander Thompson.
4.4 Summary

In this chapter, we examined employee status, events, Event Reasons, and workflows. We discussed how these concepts are used, when they are used, and how they are configured. We also demonstrated how they support the different processes in the system and enable employee history and approvals to be accurate and logical.

In the next chapter, we’ll take a deep dive into the extensibility options in Employee Central and how you can leverage these to create new objects, screens, and applications for your system.
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