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Business Rules are part of the Metadata Framework (MDF) that enables changes to behavior across SAP SuccessFactors, including Employee Central, without performing customizations. This chapter describes how Business Rules work and shows how they can be used to add customer-specific rules to modify the behavior of the SAP SuccessFactors system.

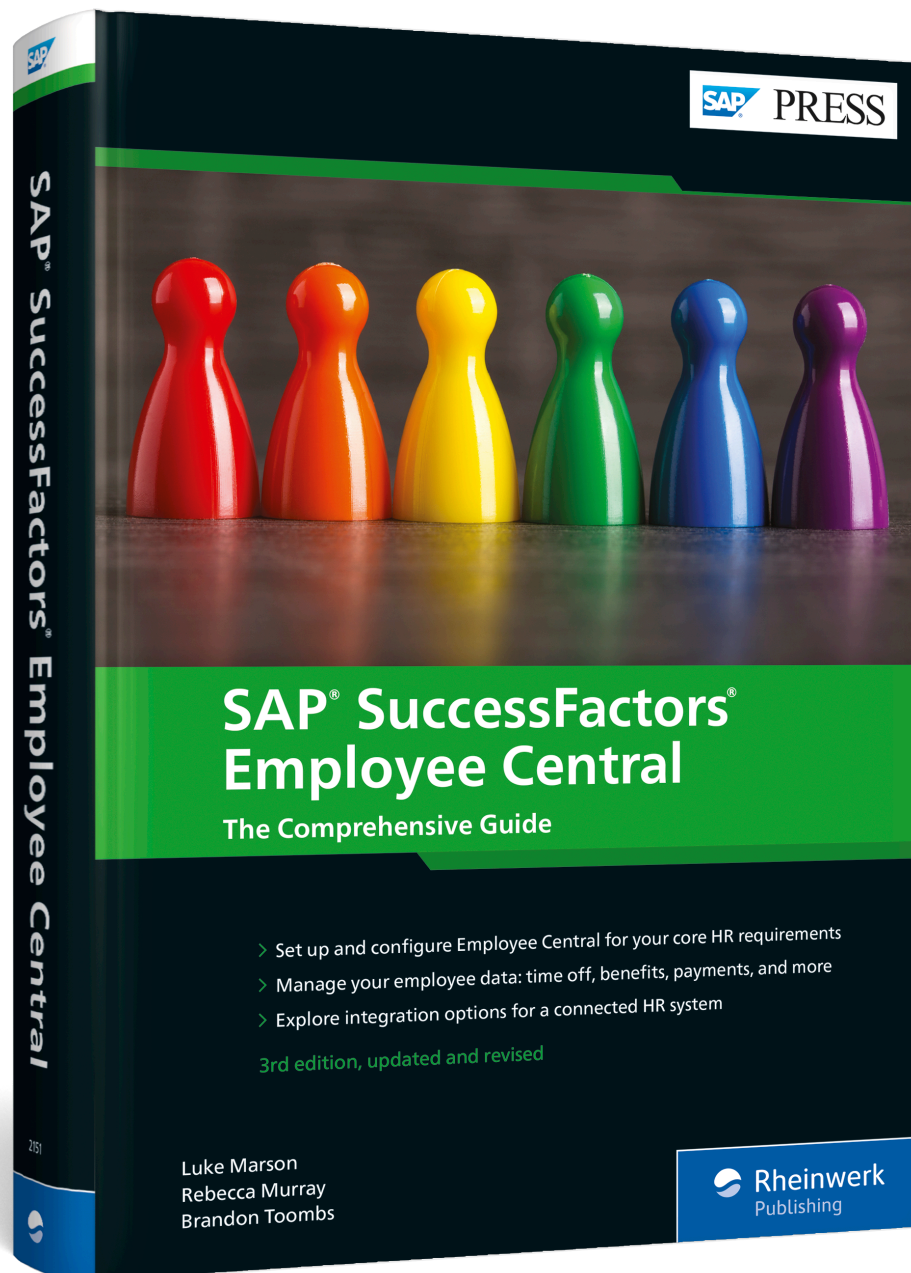
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Luke Marson, Rebecca Murray, Brandon Toombs

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Chapter 6

Business Rules

Business Rules enable you to modify the behavior of the system in many ways, without performing customizations. From hiding fields to triggering workflows to kicking off Intelligent Services, Business Rules provide a great deal of functionality and flexibility.

Business Rules are a powerful part of the Metadata Framework (MDF) that enables changes to behavior across SAP SuccessFactors, including Employee Central. Business Rules are a foundational part of extensibility and can be used for a variety of different purposes, as follows:

- Setting default values in the New Hire process
- Defining person IDs or IDs of other objects
- Propagating data
- Calculating the value of a field when a portlet loads or when data changes in a field
- Changing the values of fields based on the values of other fields
- Showing or hiding fields based on other field values
- Performing numerical field calculations
- Retrieving values from lookup tables
- Defining Event Reasons and workflows for self-service
- Setting up alerts and notifications
- Triggering Intelligent Services

This is by no means a comprehensive list of use cases. The flexibility available to define rules, combined with the standard-delivered rule functions provided in the system, means that there are multiple ways to apply Business Rules functionality across the system and for different use cases.

Additional Resources

You can read more about extensibility in SAP SuccessFactors in Chapter 3 of *SuccessFactors: An Introduction* by Amy Grubb and Luke Marson (3rd ed., SAP PRESS, 2020).

Additionally, you can find more details in the *Implementing Business Rules in SAP SuccessFactors* guide and in the *Implementing the Metadata Framework (MDF)* guide found on the SAP Help Portal.

In this chapter, we'll take a look at how Business Rules work, some of the use cases available, how to build and apply rules in the system, scheduling rules for batch events, and how to perform rule traces with the Business Rule Execution Log.

6.1 How Business Rules Work

There are two aspects to how Business Rules work in the system: how the rules themselves work and how the triggering of rules work. We'll look at both of these within this chapter. Business Rules (also simply called rules) can be created for legacy Foundation Objects, Generic Objects (including MDF Foundation Objects), and Employee Central objects (Person and Employment objects).

6.1.1 Structure of Business Rules

Rules have a standard logic flow and are configured with the following five sections:

- **Basic Information**
Attributes such as rule name, ID, type, Base Object type, effective date, and description.
- **Parameters**
Parameters that add additional context to a rule for certain scenarios (covered in Section 6.1.2).
- **If conditions**
The logic to trigger the rule.
- **Then conditions**
The logic to execute after the rule is triggered.
- **Else conditions**
The logic to execute if the If conditions aren't met.
- **Else If conditions**
The logic to execute if the Else conditions aren't met.

Each Business Rule is built for a specific object type (the *Base Object*) and uses If conditions to determine the trigger conditions of the rule and Then conditions to determine what will happen when the trigger conditions are met. Else and Else If conditions can also be used to add in different multistep conditions. Both *And* and *Or* operators are supported within rules, and many functions (e.g., mathematical, date/time, select/lookup, concatenate/substring) are provided for use in If, Then, Else, and Else If conditions. You can also set the If conditions to be always true; for example, the Then conditions always trigger when a rule is triggered. This is often used for field defaults or for field-level changes that trigger a rule.

Figure 6.1 shows an example of a rule that sets the value of three fields on an employee's Job Information based on the Event Reason selected. This rule is used in the New Hire Wizard.

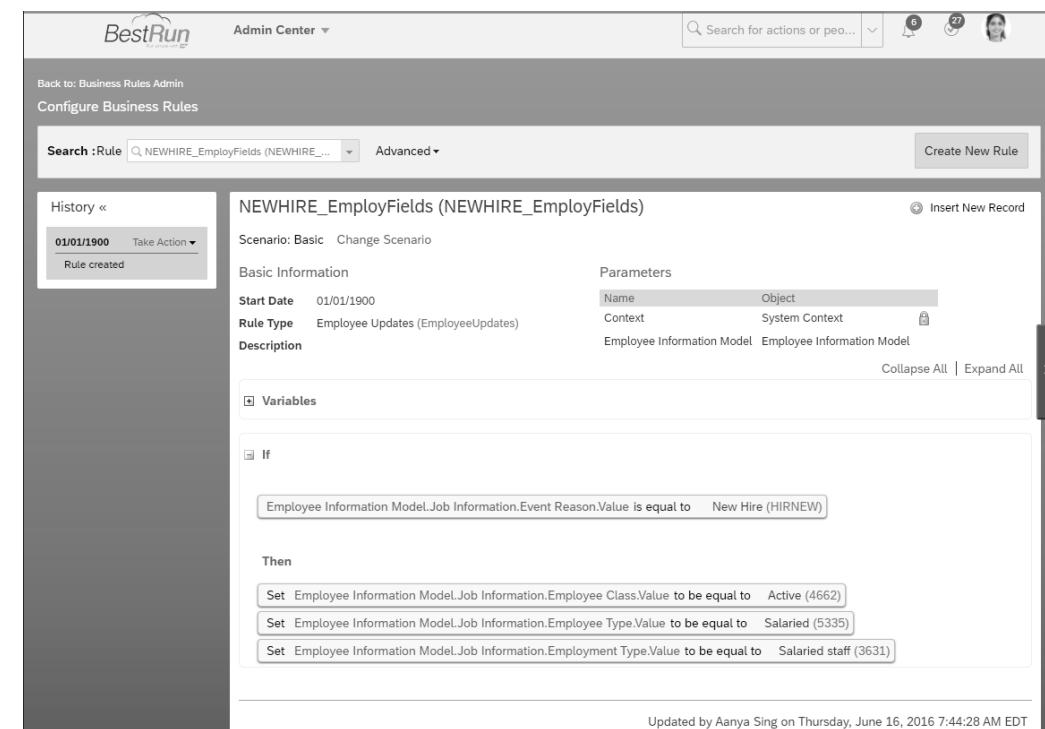


Figure 6.1 A Business Rule That Sets a Number of Attributes based on a Condition

Rules are effective-dated, meaning that a rule change can be future-dated. This could be important, for example, to set a new eligibility for a compensation or benefits enrollment in the future. Say that your compensation eligibility is going to change on January 1, 2023. Instead of waiting until January 1, 2023, to make the change, you can create a new record for the rule with the date of January 1, 2023, for when the new record of the rule will go into effect.

Let's now look at a few other concepts related to how rules work. We'll start by looking at rule parameters before moving onto functions, Model objects, rule execution, and some of the limitations of Business Rules.

6.1.2 Parameters

Rules can have parameters added, which are used for specific purposes and are defined by SAP SuccessFactors (i.e., you can't add your own parameters). For example, Time Off accrual rules or rules that trigger alerts and notifications need to have parameters added to a Business Rule to enable the If and Then conditions to be executed. If parameters are needed, SAP provides details of what parameters to configure in the appropriate implementation guide.

There are multiple rule scenarios that a user can use to more quickly and correctly build rules for certain scenarios. Each rule scenario inserts the required parameters into the Business Rule automatically during initialization of the Business Rule. The rule scenarios include such scenarios as Document Management, Intelligent Services Center (ISC), and Time Management.

6.1.3 Variables

Variables can be used to simplify rule design and processing. Variables enable fields or functions to be defined as a rule-specific variable that can be reused throughout the rule. When a rule is initialized for execution, it will first initialize the variables; for a variable using a function, this means that the variable will be executed so that the output of the function is stored in the variable to be used throughout the rule. Variables are read-only.

For example, a variable can be added that uses the `Difference In Calendar Years()` function to calculate the number of years an employee has been in a role. This value can then be used in the If, Then, Else, and Else If conditions.

6.1.4 Rule Functions

Rule functions (simply referred to as functions) can be used within a rule to perform specific operations or calculations. These enable you to add specific complexity to your rules, such as performing mathematical calculations or deriving the user that is logged in to the system. Functions always have a set of parentheses after their name, such as `Concatenate()` or `Difference In Calendar Years()`.

When using functions, it's important to note that the data type of the field you've selected will define which functions are available to use. Likewise, after you've selected a function, that function will drive the fields that can be used within the function. For example, if the field you want to use has a data type of `String`, then the `Multiply()` function won't be available for that field. If you select the `Multiply()` function, then the input fields for that function can only be fields of data type `Decimal` or `Number`. In Table 6.1, you can see the mapping of data types between objects in Employee Central and the Business Rules.

| Employee Central Object Data Type | Business Rules Data Type |
|-----------------------------------|--------------------------|
| String | Text |
| Boolean | Boolean |
| Date | Date |
| Double | Decimal |

Table 6.1 Object and Business Rules Data Type Mapping

| Employee Central Object Data Type | Business Rules Data Type |
|-----------------------------------|--------------------------|
| Decimal | Decimal |
| Big Decimal | Decimal |
| Long | Number |

Table 6.1 Object and Business Rules Data Type Mapping (Cont.)

For fields that are for Foundation Objects, Generic Objects, Picklists, and Enum fields, Business Rules will show their list of values.

There are various groups of functions, some of which are listed here:

■ Mathematical functions

These enable mathematical operations to be performed on fields of data type `Decimal` or `Number`. They include functions such as the following:

- `Add()`
- `Divide()`
- `Opposite Sign()`
- `Round()`
- `Random()`

■ Module-specific or feature-specific functions

These functions are provided for specific modules or features (e.g., Position Management functions, Pay Scale Structure functions, Time Off functions), which must be enabled in the instance for them to be available. These functions can include the following:

- `Get Pay Range By Position()`
- `Get Number Of Eligible Days()`
- `Get Pensionable Salary()`
- `Is Employee Full Time Worker()`
- `Next Pay Scale Level from Pay Scale Structure()`

■ String functions

These functions enable operations to be performed on fields of data type `String`. They include functions such as the following:

- `Concatenate()`
- `Format()`
- `Replace()`
- `Substring()`
- `To Uppercase()`

■ Time-related and date-related functions

These functions enable date and time-related operations to be performed on or with fields that have data type Date, Decimal, or Number. They include functions such as the following:

- Day Of Month()
- Difference In Calendar Years()
- Get Number Of Months From Start Date Until End Date()
- Timestamp Current Time UTC plus Offset Minutes()
- Today()

■ Intelligent Services functions ("Execute" functions)

These functions are used in Then statements of rules that are used for triggering Intelligent Services. They include functions such as the following:

- Trigger First Time Manager Event()
- Trigger New Hire Event()
- Trigger Worker Job Classification Change Event()
- Trigger Worker Long Term Disability Event()
- Trigger Worker Manager Change Event()

■ Other/miscellaneous functions

These are other functions that don't fall into the other groups of functions, such as the following:

- Get Next Value()
- Is Empty()
- Is User in Permission Group()
- Login User()
- Lookup()

For a full list of functions, refer to the *Implementing Business Rules in SAP SuccessFactors* guide found on the SAP Help Portal.

6.1.5 Model Objects

Many Employee Central objects have a Model version. The Model version of an object has the following three uses in Employee Central:

- Enables the visibility to be set for fields
- Enables fields to be made required or not required
- Enables a rule to compare a previous value of a field with the current value being set

For example, the Job Information Model allows any field on Job Information to have its attributes changed by a rule, such as a field being made not visible by a change in another field.

Model versions of objects are named simply with the object name appended with the word "Model." For example, the Model version of the National ID Information object is called National ID Information Model.

The Employee Information Model object also allows any field of any human resource information system (HRIS) element of an employee to be part of the same rule. This can be useful for setting field defaults or querying data in different parts of the employee's data set.

Some Employee Central objects store data in rows and columns; that is, they have multiple rows of records. The Model versions of these objects have specific restrictions about how rules using these objects can be built. These Model objects include the following:

- Compensation Model
- Email Information Model
- Job Relationships Model
- National ID Information Model
- Recurring Pay Components Model
- Social Accounts Information Model
- Spot Bonus Model
- Work Permit Information Model

For these objects, if you want to set the visibility or required attributes of a column of data, then the If condition of your rule needs to be set to **Always True**. In the Then conditions, you should only put conditions to set the visibility or required attributes (i.e., you should not put any conditions to set field values here). Entire rows of data can't have their visibility or required attributes changed.

In the following sections, we'll discuss setting field attributes using Model objects and comparing previous and new values.

Setting Field Attributes Using Model Objects

On Model objects, attributes for a field are set in the same way that field values are set. When defining Then conditions of Model objects to set the visibility or required attribute of a field, you'll need to add the option for either attribute in a text field. These options are as follows:

- **Required**, which can be the following:
 - **true**: The field will become required.
 - **false**: The field will no longer be required.

- **Visibility**, which can be the following:
 - **both**: The field will be visible and editable.
 - **view**: The field will be visible but read-only.
 - **none**: The field won't visible.

In Figure 6.2, a field from the Job Information Model is being set to be required in the **Then** conditions of a rule.

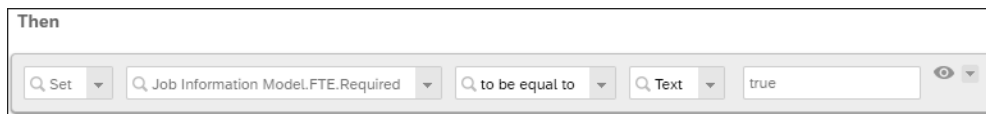


Figure 6.2 Setting a Field as Required

Required Fields

Standard-delivered fields that are required in the system configuration should not be set to *not required* using a Business Rule. Doing this may lead to errors or cause instability in the system. For a full list, refer to the *Implementing Business Rules in SAP SuccessFactors* guide found on the SAP Help Portal.

Comparing Previous and New Values

You can use the **Value** and **Previous Value** attributes to compare the new value of a field against its previous value in the **If** conditions, as shown in Figure 6.3.

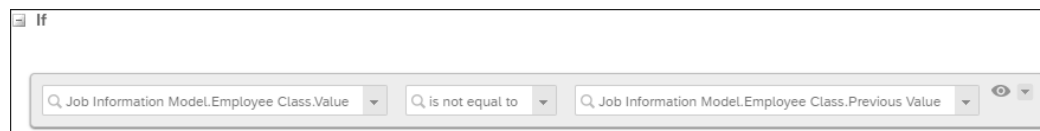


Figure 6.3 Comparing the Previous Value and Current Value of a Field

You can also compare specific changes to a field, such as a previous value being a specific value and the new value being a specific value. Figure 6.4 shows an example of this.

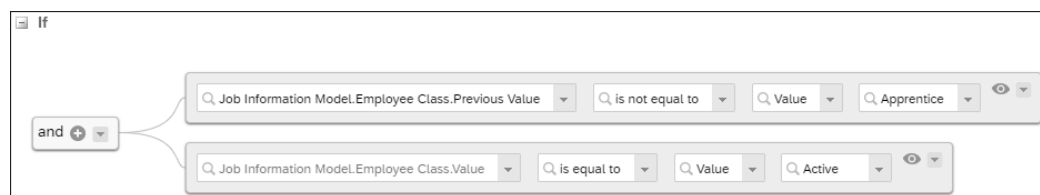


Figure 6.4 Comparing Specific Previous and Current Values

When setting a value in the **Then** conditions, you must use the **Value** attribute of a field.

Previous Value in Then Conditions

You can't set the previous value of a field in the **Then** conditions of a rule. The system will ignore any **Then** conditions that set the previous value of a field.

Model object rules are assigned to events in the same way as other objects.

Additional Resources

For more details about Model objects in Employee Central, refer to the "Creating Rules" section of the *Implementing Employee Central Core* guide found on the SAP Help Portal.

Now let's look at how rules are assigned and executed.

6.1.6 Rule Execution

There are various events where a rule can be triggered. Rules can be triggered at the object level or the field level for Foundation Objects, Generic Objects, and Employee Central objects, as we'll discuss in the following sections.

Trigger Events

For rules assigned on any type of object, rules can be assigned to trigger on any of the following events:

- **onInit (called Initialization or Initialize Rules for Generic Objects)**
Triggers a rule when the Add New Employee or Manage Org, Pay and Job Structures screens load.
- **onSave (called Saving or Save Rules for Generic Objects)**
Triggers a rule to validate field changes when the portlet or screen (e.g., **Add New Employee, Employment Information, or Personal Information**) is saved after being modified. For Employee Central Objects, this event is the trigger event used to trigger workflows.
- **onView**
Triggers the rule when the portlet loads (not available for the Home Address portlet or Primary Emergency Contact portlet).
- **saveAlert**
Triggers a rule for the Alerts and Notification feature.
- **onPostSave**
Triggers rules used for Event Derivation and Intelligent Services.

- **onEdit**

Triggers a rule to default the values for editable fields in the **Payment Information** portlet (paymentInfo object) on the **Personal Information** screen in the People Profile.

- **onPostSave (called After Saving or Post Save Rules for Generic Objects)**

Triggers a rule used for Generic Objects workflows.

For Generic Objects, the following additional events are available:

- **onValidate (also called Validation or Validate Rules for Generic Objects)**

Triggers a workflow after a Generic Object is saved.

- **onDelete (called Deletion or Delete Rules for Generic Objects)**

Triggers a rule used to delete Generic Object records.

Field-level rules can only be assigned as **onChange** rules, which means that they trigger whenever the value of the field changes. For the **Add New Employee** wizard, only **onInit**, **onSave**, **onChange**, and **onPostSave** events are available.

Assigning a Rule Multiple Times within One HRIS Element

While it's possible to assign a rule multiple times in the same HRIS element using different trigger events, the rule will only trigger for the first trigger event. A workaround is to copy the rule and assign the copied rule to a different trigger event.

Rules are assigned in a number of ways, depending on the object. We'll look at each of the objects now.

Legacy Foundation Objects

Rules are assigned to legacy Foundation Objects in the Corporate Data Model XML. To assign the rule at the object level, add the `<trigger-rule>` code (an example follows this paragraph) underneath the last `<label>` tag inside the `<hris-element>` tag. To assign the rule at the field level, add the code underneath the last `<label>` tag inside the `<hris-field>` tag. Example `<trigger-rule>` code usually looks like the following:

```
<trigger-rule event="onInit" rule="INIT_DEPARTMENT" />
```

In this example, the trigger event is `onInit` and the rule is `INIT_DEPARTMENT`.

Generic Objects

Rules are assigned to Generic Objects in Extension Center or in **Configure Object Definitions in Company Settings** in the **Admin Center**. Select the Generic Object you want to assign the rule to, click the **Take Action** menu, and select **Make Correction**. To assign the rule at the object level, use the following steps:

1. Scroll down to the **Rules** section.
2. Under the heading of the appropriate event (e.g., **Save Rules**), select the dropdown that contains the text **No Selection**, and select the rule you want to assign.
3. Click **Save**.

In Figure 6.5 you can see a rule being assigned to a Generic Object.

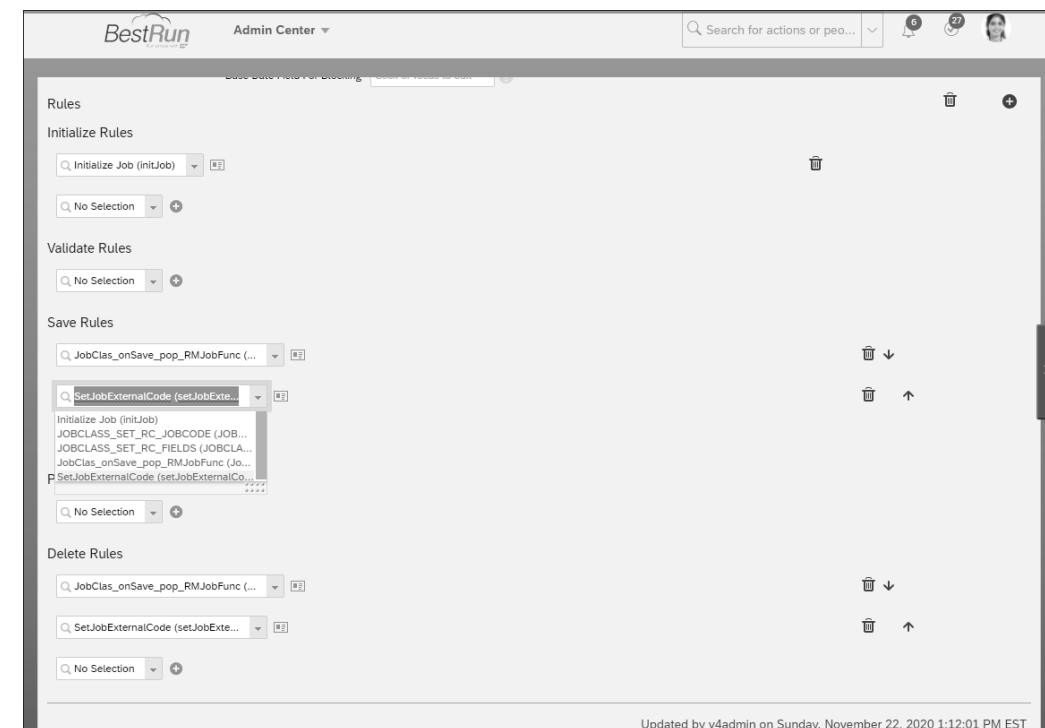


Figure 6.5 Assigning a Rule to a Generic Object

To assign the rule at the field level, follow these steps:

1. Select **Details** on the row of the field that you want to assign the rule to.
2. Scroll down to the **Rules** section.
3. In the **External Code** dropdown, select the rule to assign.
4. Click **Done**.
5. Repeat for any other rules you want to add.
6. Scroll down to the bottom, and click **Save**.

In Figure 6.6, you can see a rule being assigned to a field of a Generic Object.

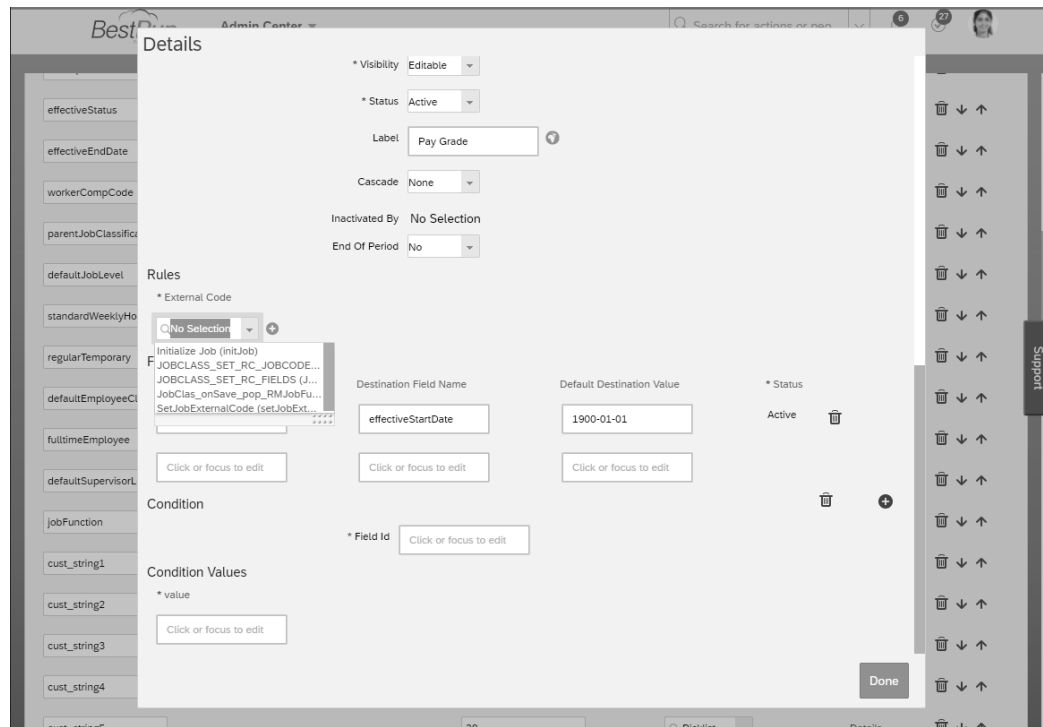


Figure 6.6 Assigning a Rule to a Field of a Generic Object

Employee Central Objects

Rules are assigned to HRIS elements in the Admin Center via **Company Settings • Manage Business Configuration**. Rules are assigned to HRIS elements by performing the following steps:

1. Select the HRIS element in the menu on the left.
2. On the right side, scroll down to the **Trigger Rules** section at the bottom.
3. In the **Base Object** dropdown, select the Base Object your rule was created for.
4. In the **Event Type** dropdown, select the appropriate event (e.g., onInit or onView).
5. In the **Rules** dropdown, select the rule to assign.
6. Click **Details** to configure specific screens, portlets, or processes in Employee Central where the rule can or can't trigger; these can be seen in the **Rule Contexts** section in the **Details** window in Figure 6.7. When you've finished in the **Details** window, click **Done**.
7. Click **Save** to save your changes.

Figure 6.8 shows a rule being assigned to the **personInfo** HRIS element in **Manage Business Configuration**.

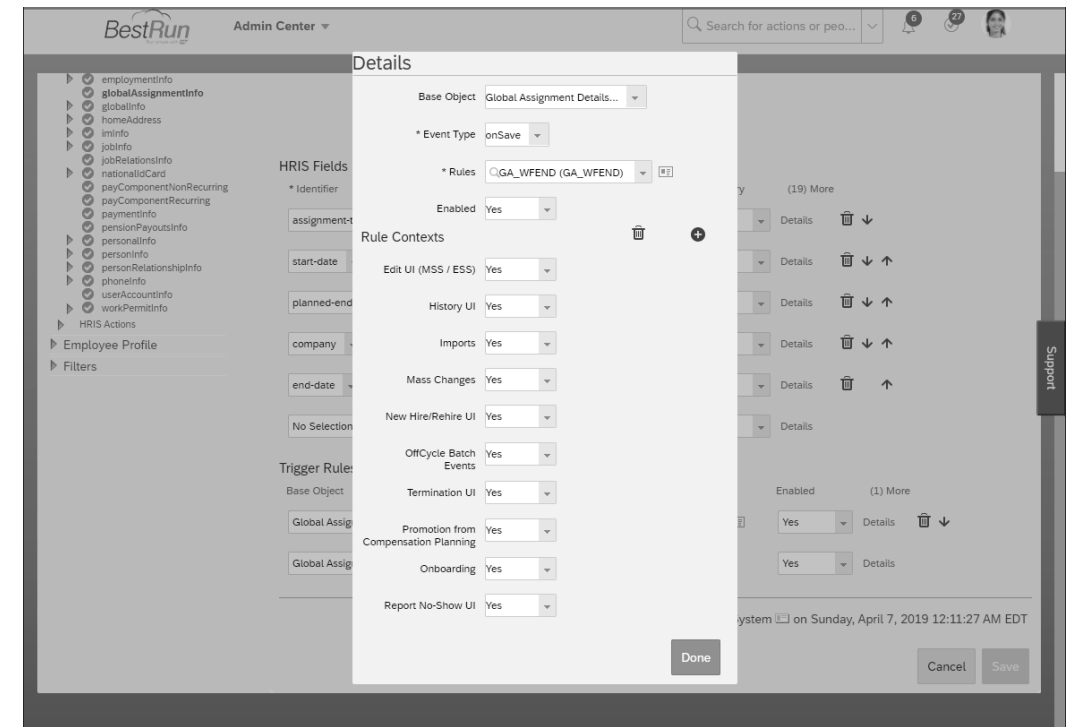


Figure 6.7 Details Window for a Rule Assignment

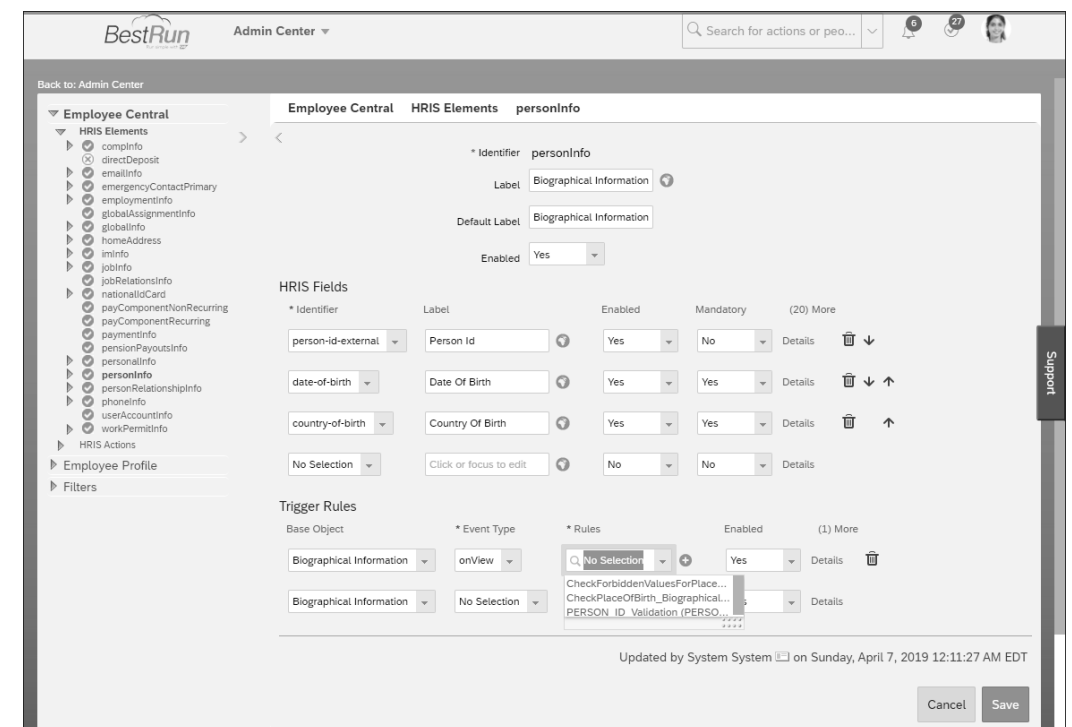


Figure 6.8 Assigning a Rule to the personInfo HRIS Element

To assign the rule at the field level, follow these steps:

1. Select **Details** for the field you want to assign the rule to.
2. Scroll down to the **Trigger Rules** section.
3. In the **Base Object** dropdown, select the Base Object your rule was created for.
4. In the **Event Type** dropdown, select **onChange**.
5. In the **Rules** dropdown, select the rule to assign.
6. Click **Details** to configure specific screens, portlets, or processes in Employee Central where the rule can or can't trigger; this is exactly the same as the **Rule Contexts** section in the **Details** window shown earlier in Figure 6.7. When you've finished in the **Details** window, click **Done**.
7. Click **Done**.
8. Scroll to the bottom and click **Save**.

Now let's look at managing rules in the system.

6.2 Managing Business Rules

Rules are managed in the **Business Rules Admin** page, which is accessed in the Admin Center via **Company Settings • Configure Business Rules**. When building an Extension in Extension Center, you can create rules directly in Extension Center. The **Business Rules Admin** page is shown in Figure 6.9.

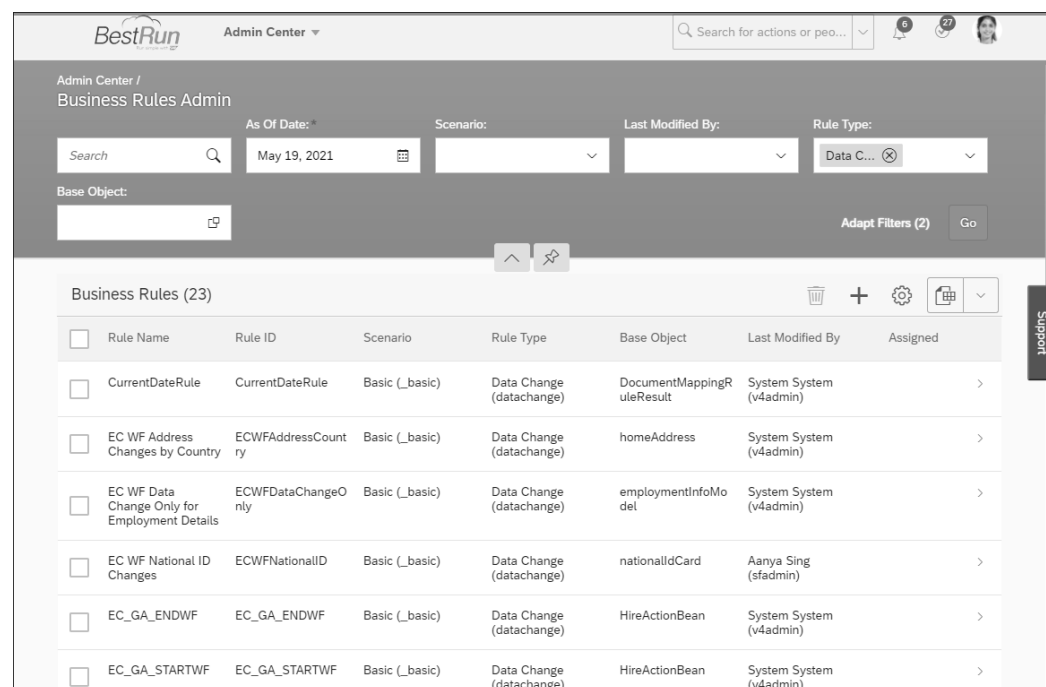


Figure 6.9 Business Rules Admin Page

The **Business Rules Admin** page is the central place to manage all the rules configured in your system. The **Business Rules Admin** page gives you the ability to search for, view, edit, and delete the rules in your system. You can also create rules here, which we'll cover in Section 6.3.

There are various search criteria fields at the top of the page. These fields provide you with the ability to search by the following attributes of the rules in the system:

- Free text search
- Effective date
- Rule scenario
- Last date that the rule was modified on
- Rule Type
- Base Object

To search, you select the criteria and click the **Go** button. There are also additional filters available by selecting **Adapt Filters**, located to the left of the **Go** button. In the **Adapter Filters** window (see Figure 6.10), you can see the search criteria just mentioned in the **Basic** section.

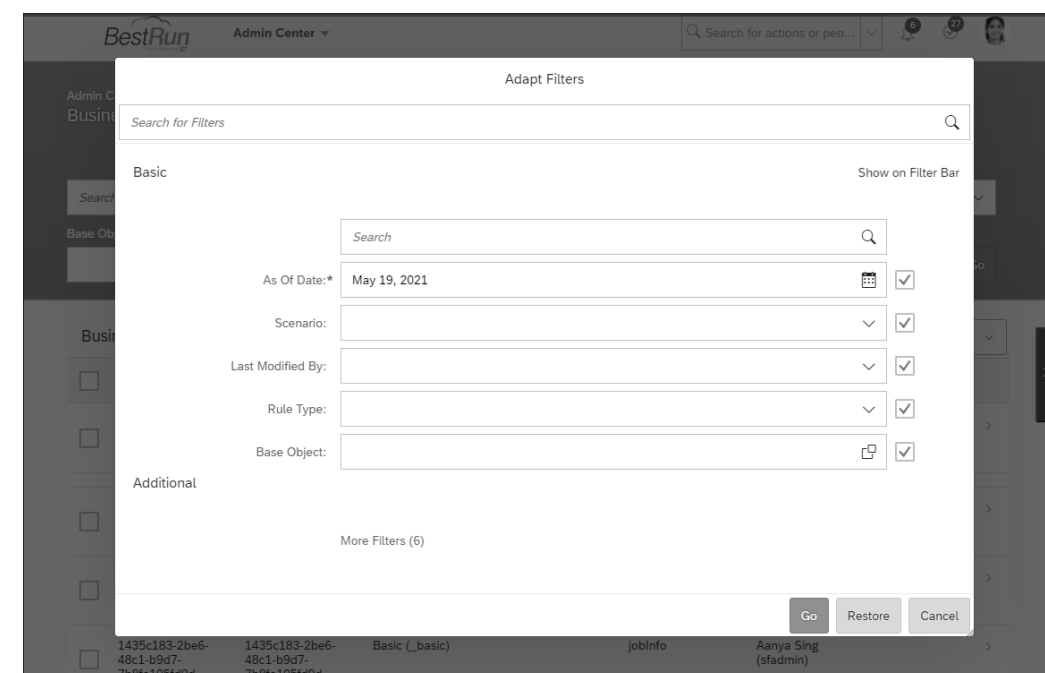


Figure 6.10 Adapt Filters Window

Below the **Basic** section is the **Additional** section in which you can add additional search criteria by clicking **More Filters**. This opens the **Select Filters** window (see Figure 6.11), where you can select some additional search criteria, including the following:

- Rule creator
- Description
- Last date the rule was modified
- Rule ID
- Rule name
- Start date of the rule

After selecting any additional search criteria, click **Ok** to go back to the **Adapt Filters** window. Click the **Go** button to perform the search. You'll be taken back to the **Business Rules Admin** page with the search results shown in the **Business Rules** section, located below the search criteria (refer to Figure 6.9).

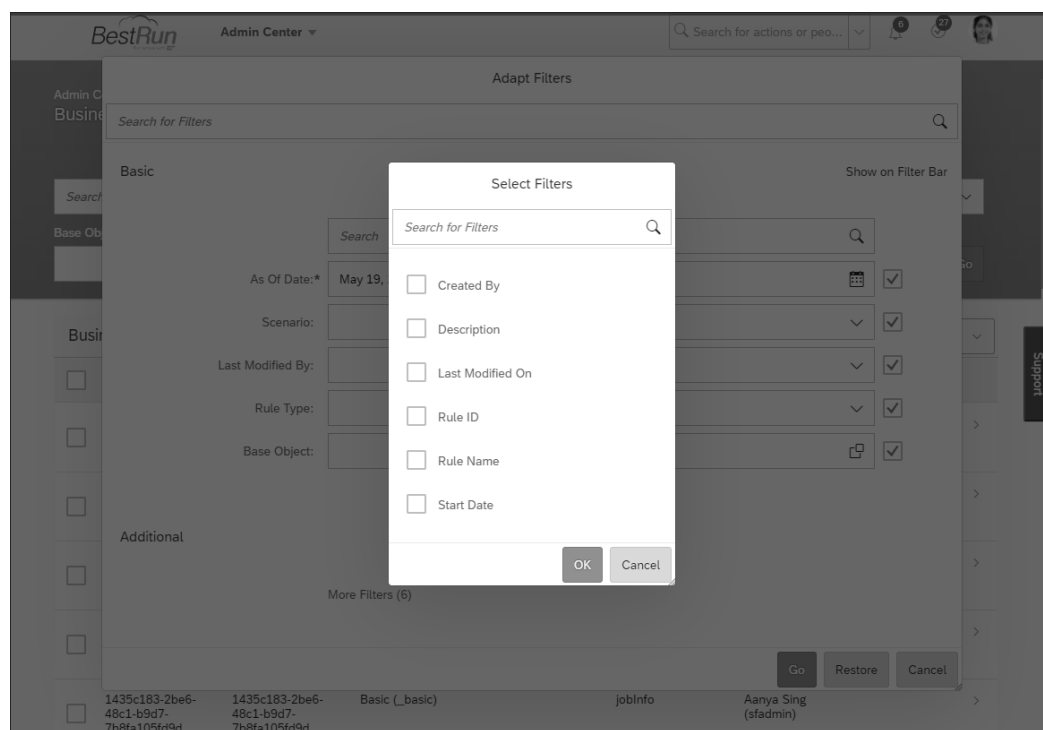


Figure 6.11 Select Filters Window

To view a rule, click anywhere on the row of the rule you want to view. You'll see the rule as shown earlier in Figure 6.1.

Rules can be created (also covered in the next section) and deleted here. To delete a rule, click the **Rule Name** checkbox, and then click the **Delete** button (trashcan icon).

Now let's look at creating a Business Rule.

6.3 Creating a Business Rule

Rules are created in the **Business Rules Admin** page, which is accessed in the Admin Center via **Company Settings • Configure Business Rules**. When building an Extension in Extension Center, you can create rules directly in Extension Center.

To create a new rule, select the **Create New Rule** button (cross icon) located on the right side of the **Business Rules** section.

After clicking the **Create New Rule** button, you're taken to the **Configure Business Rules** screen. Here you're presented with all the rule scenarios available for creating rules. We discussed these in Section 6.1.2. The rule scenarios that are available depend on what features you've enabled in your instance. No matter what is enabled, you'll always have the **Basic** rule scenario option available to create a rule of any type from scratch.

Figure 6.12 shows some of the different rule scenarios available, as well as the process to start creating a new rule using a **Basic** rule scenario.

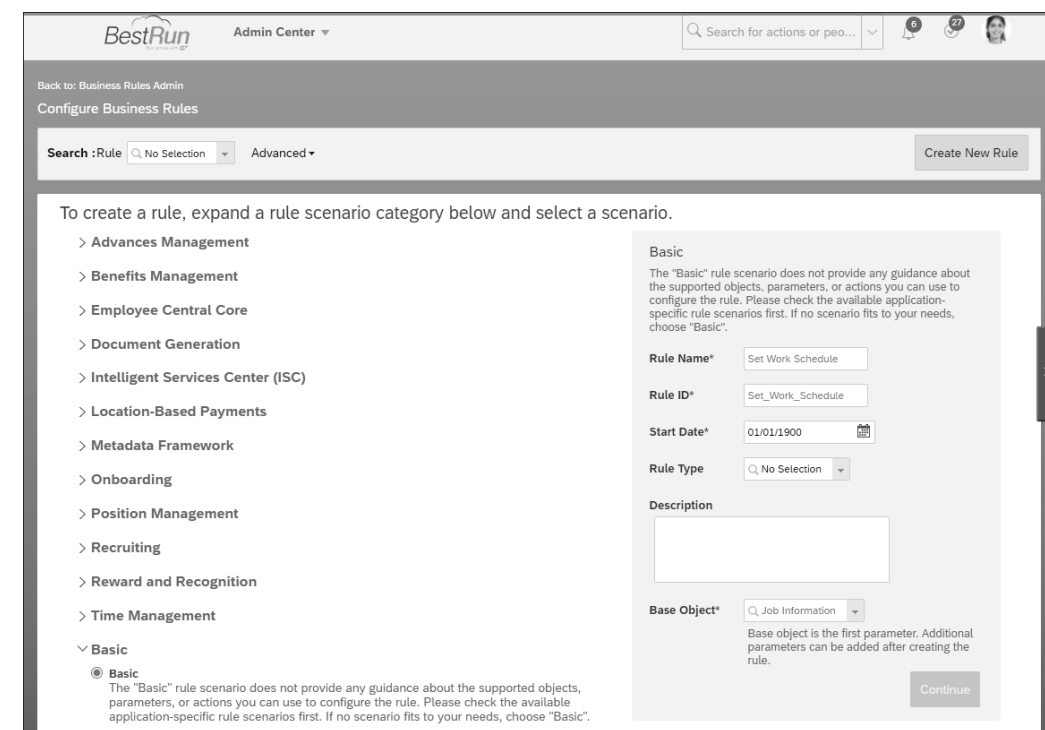


Figure 6.12 Rule Scenarios

After you select a rule scenario, you need to enter some basic details about the rule on the right side of the screen. Here you need to enter the **Rule Name**, **Rule ID**, and **Start Date** of the rule. You can optionally enter a **Description**. If you've selected the **Basic** rule scenario, then you need to select the **Base Object** (we'll discuss this more in Section

6.3.1) and—if you wish—a **Rule Type**. After you've entered these details, click the **Continue** button to begin configuring the rule itself.

In the next screen, you'll see the rule definition with information just entered in the previous screen in three places, as shown in Figure 6.13:

- The name and ID of the rule entered in the **Rule Name** and **Rule ID** fields are shown at the top of the rule definition, with the rule ID in parentheses.
- The rule scenario that was selected is shown underneath the name and ID.
- The effective date, Rule Type (if defined), and definition (if defined) entered in the **Start Date**, **Rule Type**, **Description** fields are shown in the **Basic Information** system underneath the rule scenario.

You can change any of these details—except for the Base Object—by clicking the pencil icon next to **Basic Information**.

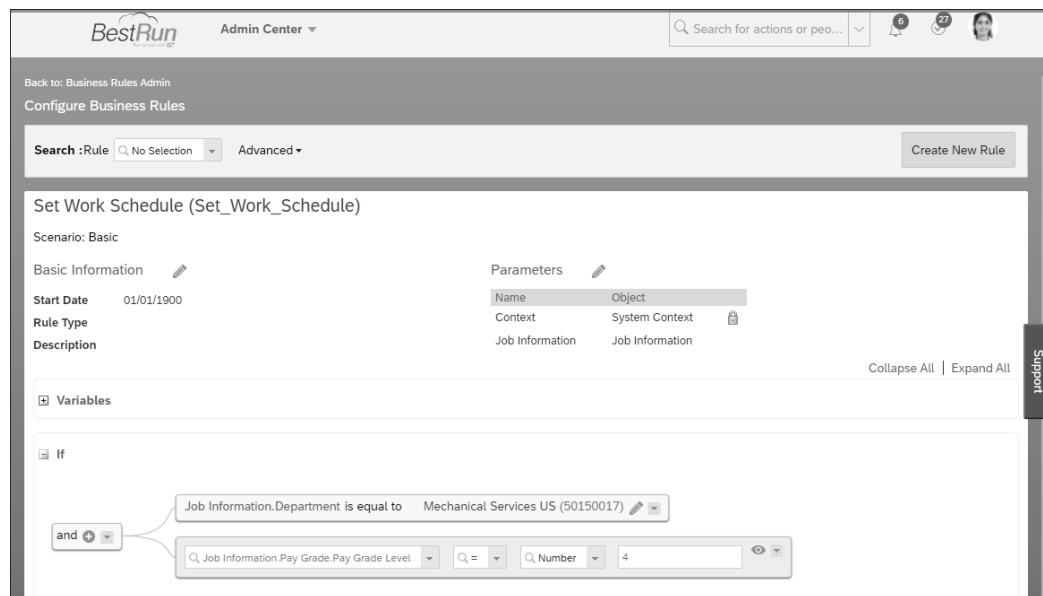


Figure 6.13 Example Rule Being Created

If you selected the **Basic** rule scenario, then you'll need to configure any rule parameters in the **Parameters** section, if needed. This is done by clicking the pencil icon next to **Parameters** and then clicking **Add Parameter**. Typically, you would only add parameters that are provided by SAP SuccessFactors for configuring certain scenarios for rules.

Next, you can configure any variables that you want to use. To do this, expand the **Variables** section by clicking the box with the plus sign to the left of **Variables**, and click **Add Variable**. In the left box, enter the name for the variable, and in the right box, select the field or function for the variable. This is the same process as selecting a field or function

for an If, Then, Else, and Else If condition. After you've added any variables, you can scroll down to the If section to configure your If and Then conditions.

If and Then conditions define the conditions to trigger the rule and the behavior that occurs when the rule has been triggered. We covered these earlier in Section 6.1.1. In our example rule (being created in Figure 6.13), we'll set the **Work Schedule** field value to **2-Weeks Rotating Early-Late Shifts** if the employee's **Department** is **Mechanical Services US** and the **Pay Grade Level** of the employee's **Pay Grade** is equal to **4**. This rule would be assigned to the **Position** field of Job Information as the **Department** and **Pay Grade** fields propagate from the **Position** field, which we'll cover shortly. For this rule, we'll use a parent and operator for the If condition.

The rule is constructed in the following way:

- **If**
Department is equal to **Mechanical Services US** and **Pay Grade.Pay Level** is equal to **4**.
- **Then**
Set **Work Schedule** to be equal to **2-Weeks Rotating Early-Late Shifts**.

This is a simple rule, but far more complex rules can be built for a wide variety of purposes.

The first step is to select the **Department** field in the dropdown that contains the text **Select Left Expression**. In the dropdown, you'll see all the fields for the Job Information object. Fields that are of data type Foundation Object or Generic Object will have a **+** sign next to them, meaning that they can be expanded to select fields from that object (or associated objects, from which fields can be selected). For Model objects, all fields have a **+** sign that expands the attributes mentioned earlier (**Previous Value, Required, Value, and Visibility**).

After you've selected the field, you can select the operator in the next dropdown. The values available will depend on the data type of the field selected previously. Typical values include **is equal to**, **is not equal to**, **is less than**, **is less than or equal to**, and **is more than**. Depending on the field that was selected, the third dropdown value will vary. It may be **value**, which means you can select an object or Picklist value in the next dropdown; **Text**, meaning that you must enter a text value; or **Number**, meaning that you must enter a numeric value. Irrespective, it's also possible to select something different, including another field or a function. If the default is left, then you can select or enter a value in the fourth dropdown. If you select a field, then the fourth dropdown will disappear; if you select a function, then the fourth dropdown will be replaced by function-specific input fields (an example is shown in Figure 6.14).

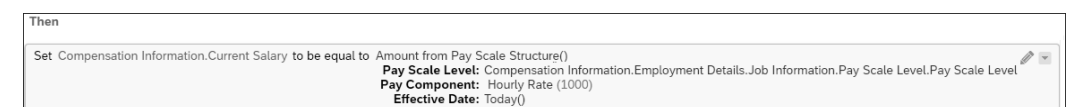


Figure 6.14 Rate from Pay Scale Structure() Function

Then conditions are set similarly to If conditions. The core difference is that before you select a field, you need to define the action for the field. There are five options:

- **Set**
Sets the value of the field.
- **Raise Message**
Raises a warning or alert message.
- **Create**
Creates a data record; typically used to create a new Pay Component.
- **Delete**
Deletes a data record; typically used to remove a new Pay Component.
- **Execute**
Executes an Intelligent Services event.
- **Add To**
Adds items to collections in SAP SuccessFactors Learning.

When the rule is completed, it will look like Figure 6.15.

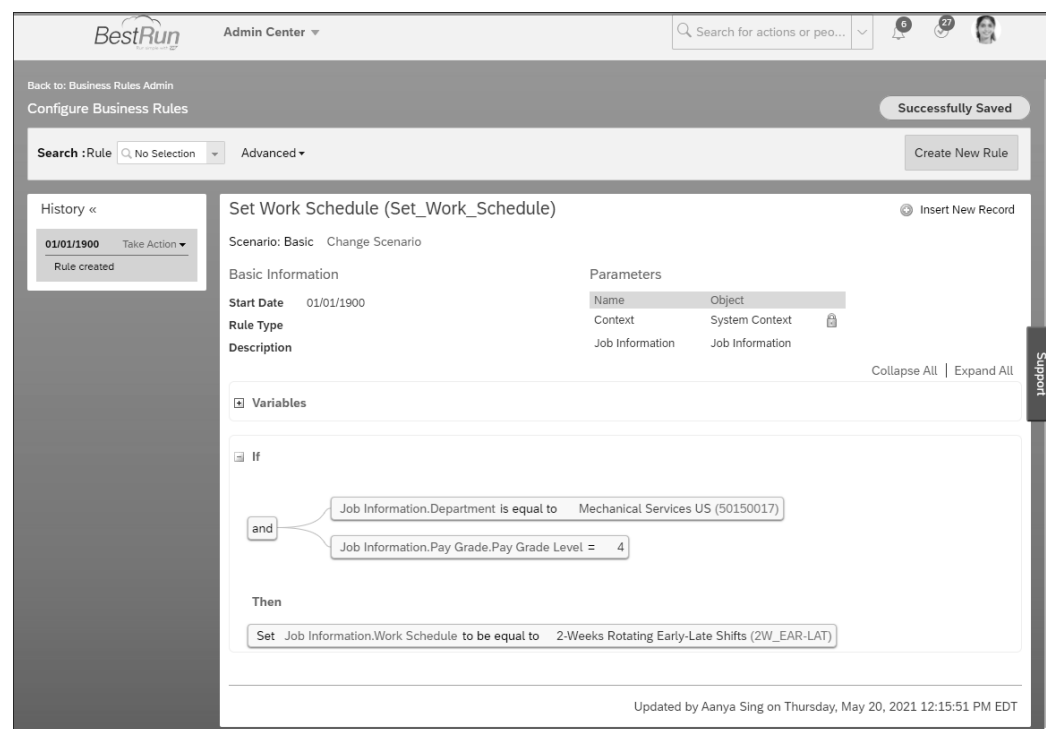


Figure 6.15 Example Rule Created

In another example, a rule validates the **Payment Information** portlet and provides an error message if it doesn't match the If conditions (see Figure 6.16).

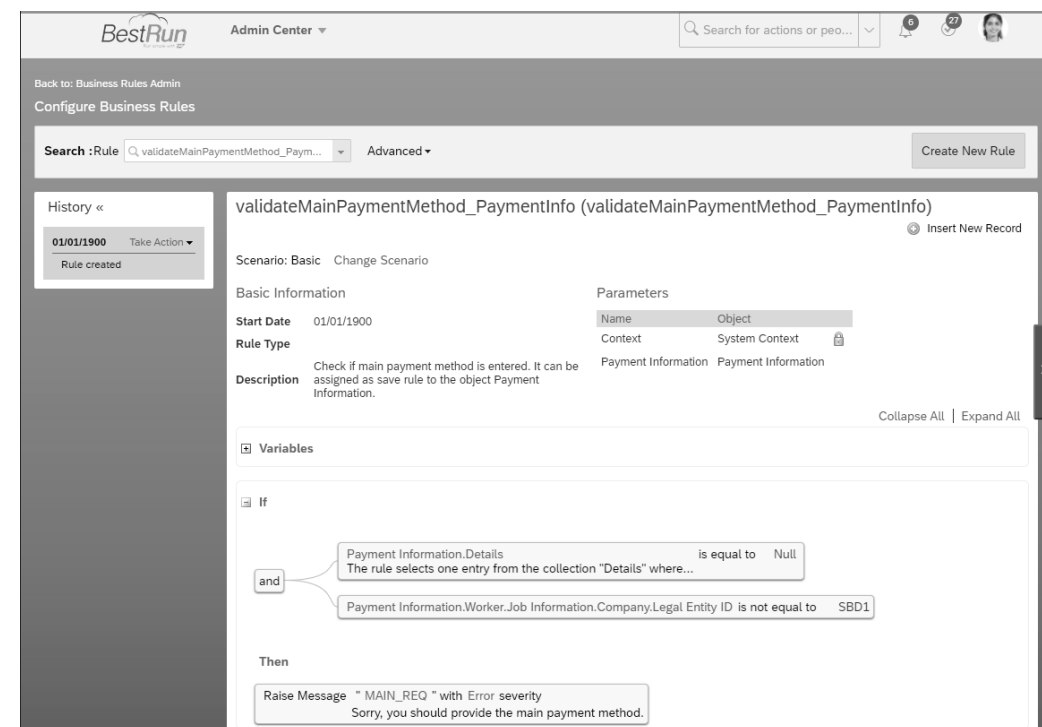


Figure 6.16 Rule to Validate Payment Information

Now that we've created a rule, let's look into a few aspects of creating rules that are important.

6.3.1 Choosing the Correct Base Object

The Base Object is simply which Employee Central object that you want the rule to be created for. The object you select defines which fields and related objects you can use when creating the rule and which events the rule can be assigned to. In essence, the Base Object that you select is the object on which you want the rule to execute. For Employee Central objects, the Base Object also affects pages and events. For example, if your rule is going to trigger on the National ID Information portlet then you would select **National ID Information** as your Base Object when creating the rule.

For the **Add New Employee** wizard, you should select either the Employee Information or Employee Information Model object as the Base Object. If you want to change the attributes of fields or compare previous values with current values of a field on an Employee Central object, select the Model object. For all other Employee Central portlets, select the object or Model object that corresponds. For legacy Foundation Objects or Generic Objects, select the object.

6.3.2 Tips for Creating Rules

Following are some key tips when creating rules that will reduce the system processing time:

- **Rule scenarios**

Use rule scenarios to make creating rules quicker and more accurate for certain business scenarios.

- **Ordering of If conditions**

The ordering of If conditions can greatly affect how quickly a rule is triggered; you should put the conditions most likely to trigger at the top so if they do trigger, the rule no longer needs to process the rest of the If conditions.

- **Length of the rule**

Long rules are always going to take more time to process; consider this when building rules.

- **Variables**

Using variables can help rules execute much quicker and make them easier to create and maintain. Try to use them where there might otherwise be a lot of repetition.

Now let's take a brief look at creating messages and referencing workflows in rules.

6.3.3 Creating Messages

You can use a rule to raise a message to users to provide information, a warning, or an error when they perform certain actions. Information and warning messages give users a message on-screen with the corresponding icon, while an error message does the same but prevents users from continuing until they have resolved the error.

Messages are created by creating a Message Definition object record in the **Manage Data** transaction in Admin Center under **Employee Files**. The Message Definition will be used by the rule to display the message to the user.

To create a rule that raises a message, follow these steps:

1. Create a rule using the **Basic** rule scenario.
2. Create the **If** condition.
3. Create the **Then** condition as follows:
 - Select **Raise Message** in the **Select Output Type** dropdown.
 - Select the Message Definition object in the **Message** dropdown.
 - Select the severity type of the message in the **Severity** dropdown by choosing from the following three options:
 - **Error**: Provides a message with an error warning that prevents users from saving the data changes until they have corrected the data that triggered the rule.

- **Warning**: Provides a message with a warning icon. If the user doesn't accept the warning message, then the data changes aren't saved.
- **Info**: Provides a message with an information icon. The message disappears after five seconds. The user can also close the message manually before it disappears.

Now let's take a look at the Off Cycle Event Batch functionality.

6.4 Off Cycle Event Batch

Off Cycle Event Batch enables the execution of rules on a batch of Employee Central object records on a periodic basis (e.g., daily). Typically, most rules are triggered based on the action of a user. However, in some cases, it's required that a rule is triggered on a set of records periodically or based on a future-dated event occurring. For example, you may want to update an employee's record based on an anniversary date or perform an update of an employee's pay scale level every year.

At the time of writing (Fall, 2021), Off Cycle Event Batch supports the following objects:

- Job Information
- Employment Details
- Employee Time
- Work Order

Off Cycle Event Batch jobs are performed using the Off Cycle Event Batch Generic Object. This Generic Object has a filter condition and an associated rule. The filter is used to select the records that the rule will run against. Note that only one HRIS element at a time can be updated by a rule. The effective date for the records created by a rule is always the date on which the Off Cycle Event Batch job is run. It's not possible to use date as an If condition for the rule.

We'll now look at creating and monitoring an Off Cycle Event Batch job.

6.4.1 Creating an Off Cycle Event Batch

To create an Off Cycle Event Batch, follow these steps:

1. Define the rule that will be executed (if it doesn't exist already) in **Configure Business Rules**.
2. Create any Off Cycle Event Batch Groups in **Manage Off Cycle Event Batch Groups**.
3. Create an Off Cycle Event Batch Generic Object record in **Manage Data**.
4. Set up an Off Cycle Event Batch job in Provisioning.

Off Cycle Event Batch Groups define the group of users who the rule will be executed for. These groups are created in the Admin Center in the **Manage Off Cycle Event Batch Groups** screen. In this screen, click on a group to view the group details, and make changes to the selection criteria. Click **Create New Group** to create the group. Groups are created in the same way that Permission Groups are defined.

The Off Cycle Event Batch Generic Object record is created in **Manage Data** in the Admin Center. Figure 6.17 shows an **Off Cycle Event Batch** Generic Object record.

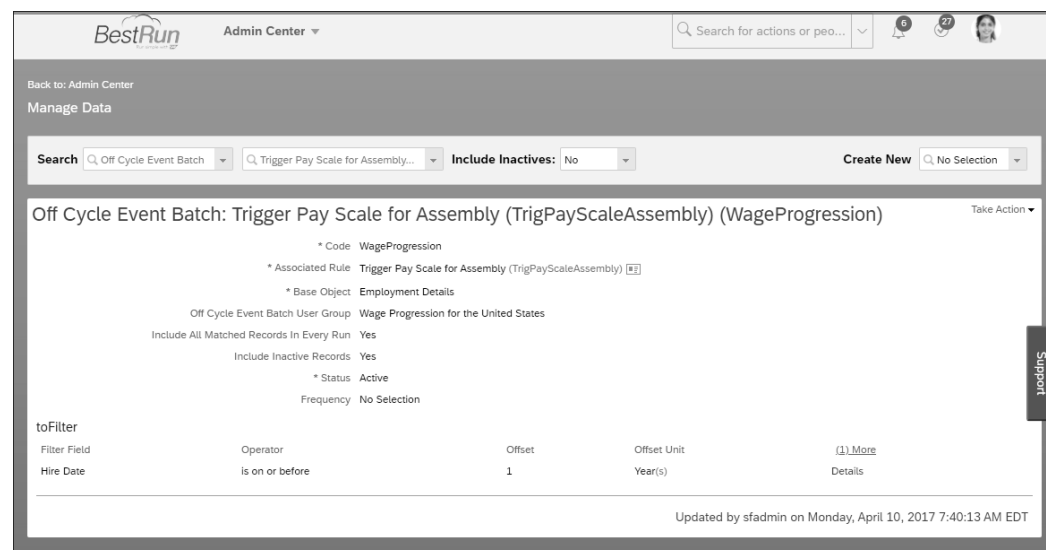


Figure 6.17 Off Cycle Event Batch Generic Object Record

To create a new Off Cycle Event Batch Generic Object record, select **Off Cycle Event Batch** in the **Create New** dropdown. The following fields are displayed for every object and must be configured when creating an Off Cycle Event Batch Generic Object record:

- **Code**
An ID for the record.
- **Associated Rule**
The rule to execute when the Off Cycle Event Batch is run.
- **Base Object**
The Base Object on which to execute the rule.
- **Status**
Whether the Off Cycle Event Batch is active or inactive; if **Inactive**, the Off Cycle Event Batch won't process.
- **Frequency**
Optional frequency to execute the rule with values of **Daily**, **Weekly**, or **Monthly**.

If you select **Job Information** or **Employment Details** as the value of **Base Object**, then the following fields will be displayed below the **Base Object** field (maintaining these fields is optional):

- **Off Cycle Event Batch User Group**
You can select an Off Cycle Event Batch Group for the rule to run against.
- **Include All Matched Records In Every Run**
You can choose whether or not to include all matched records in every run.
- **Include Inactive Records**
You can choose whether to include inactive records to be executed by the rule.
- **Include Only Current Record**
You can choose to include only the current record.

Next, it's time to define the filter that will be used to trigger the rule in the **toFilter** section, which you saw earlier in Figure 6.17. You can add multiple filter conditions, and the system will treat them as OR filters (e.g., only one filter must apply but not all filters can apply). There are four fields that must be maintained for each filter condition, as follows:

- **Filter Field**
The field on which to filter. These are all the date fields available on the Base Object selected in the **Base Object** field previously.
- **Operator**
The operator of the filter that relates the field you selected in **Filter Field** to the offset you define in the **Offset** field. There are five values to choose from:
 - is equal to
 - is before
 - is on or before
 - is after
 - is on or after
- **Offset**
The date offset from the field selected in **Filter Field**.
- **Offset Unit**
The unit of the value entered in the **Offset** field. There are seven options:
 - Year(s)
 - Quarter(s)
 - Month(s)
 - Week(s)
 - Day(s)
 - Hour(s)
 - Minute(s)

By clicking **Details** next to the right of these fields, you can access the **Details** window and optionally enter a description in the **Description** field.

After you've finished defining your filter(s), click **Save** to save the Off Cycle Event Batch Generic Object record.

Let's look at a quick example to understand how these settings filter the records that the rule will execute on. Let's say we want to trigger a rule to update an employee's **Benefits Eligibility** field in **Employment Details** after the employee has reached two years of employment. After creating the rule to update the field, we would set the following values in the filter (in the **toFilter** section):

- **Filter Field:** Hire Date
- **Operator:** is equal to
- **Offset:** 2
- **Offset Unit:** Year(s)

Figure 6.18 shows what this example would look like.

Figure 6.18 Example of a toFilter

After you've created the Off Cycle Event Batch Generic Object record, then an Off Cycle Event Batch job needs to be created in Provisioning using the job request type `BizXDailyRuleProcessingBatch`. The Off Cycle Event Batch will then execute on the schedule set in the `BizXDailyRuleProcessingBatch` job.

6.4.2 Monitoring Off Cycle Event Batch Jobs

Off Cycle Event Batch jobs can be monitored in **Monitor Job** in the Admin Center. Look for the **BizX Daily Rules Processing Batch Job**.

Additional Resources

For more details, refer to the *Using Batch Rules Processing with the Off Cycle Event Batch in SAP SuccessFactors* guide found on the SAP Help Portal.

Now let's take a look at the Business Rules Execution Log.

6.5 Business Rule Execution Log

The Business Rule Execution Log is used to perform rule traces. You can set up the Business Rule Execution Log to perform logging of specific rules to help determine if they are executing as expected and to analyze errors with rule execution. Every time the rules are run, a log is created that you can download as a comma-separated values (CSV) file.

The Business Rule Execution Log is accessed in the Admin Center via **Company Settings • Business Rule Execution Log**. The Business Rule Execution Log user interface is the same as using the **Manage Data** interface; you can search for existing rule traces (whether they are active traces or not), which can be edited or deleted, and you can create new rule traces. To demonstrate how rule traces work, we'll quickly create a rule trace.

To create a rule trace, select **Rule Trace** in the **Create New** dropdown on the right side of the screen. There are four fields to maintain:

- **Code**
Enter an ID for the rule trace.
- **Name**
Enter a name for the rule trace.
- **Start Date**
Enter the date on which the rule trace should begin.
- **End Date**
Enter the date on which the rule trace should end; note that a rule trace can only be active for a maximum of two days.
- **Login User**
Enter the user who will execute the rule; this isn't the user for whom the rule will execute.

You'll also notice the **Log** field below the **Login User** field, which can't be maintained. After your rule is saved, this will show the **Download** link next to it so that you can download the rule trace log. If the trace hasn't run or hasn't been successfully executed, then the log will be empty. The **Delete** option enables you to delete the log.

After you've entered the details in these fields, you can select the rule(s) to trace in the dropdown in the **Rules to be Logged (If Empty, All Rules Will be Logged)** section. Click **Save** to save your rule trace. Your rule trace will look like the trace shown in Figure 6.19.

Log File Size

Note that the log file can only be a maximum of 1 MB. During generation of the log file, the system will stop writing log entries to the log file when the file reaches 1 MB in size.

Once saved, the rule trace will execute on the date(s) defined in the rule trace. At any point during or after this period, you can go to the rule trace and download the logs that we mentioned previously.

Impact on System Performance

Every time a trace is performed on a rule using the Business Rule Execution Log, the performance of the system is negatively impacted. It's important to only perform a trace when required and to turn off the logging of any rules when it's no longer needed. It's also recommended to perform rule traces in productive environments outside of business hours and to control the tracing process; for example, don't run a trace for a rule in a scenario that performs mass processing or updates or runs multiple traces at the same time.

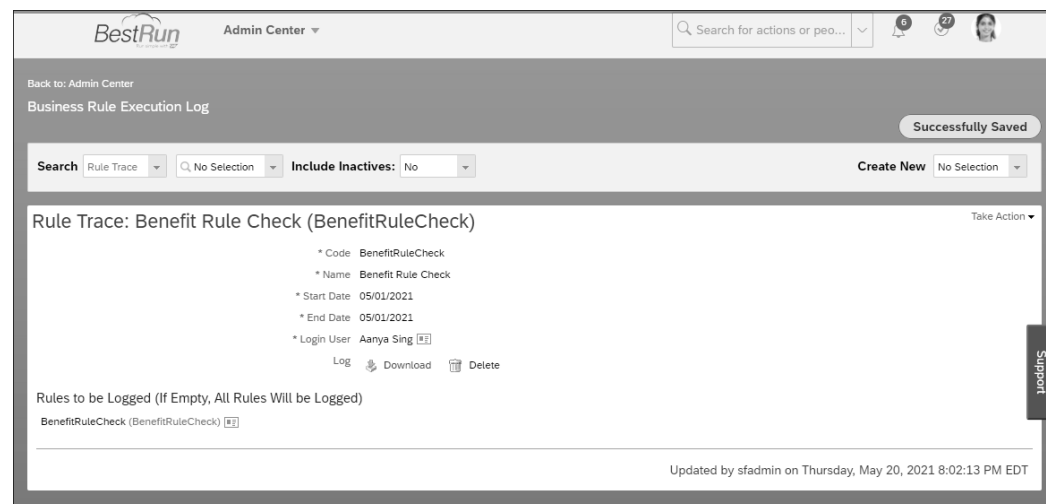


Figure 6.19 Rule Trace

6.6 Summary

In this chapter, we looked at Business Rules, how they can be used for a variety of scenarios, and some of their key aspects. We also explained how to create a Business Rule and use it in the system, including the Off Cycle Batch Event functionality. We then discussed the Business Rule Execution Log that can be used to perform rule traces. Based on this chapter, you should have a good understanding of all facets of Business Rules and how to apply them in your system.

Now that extensibility is covered, we'll take a look at the Foundation Objects that define employee master data in Employee Central.

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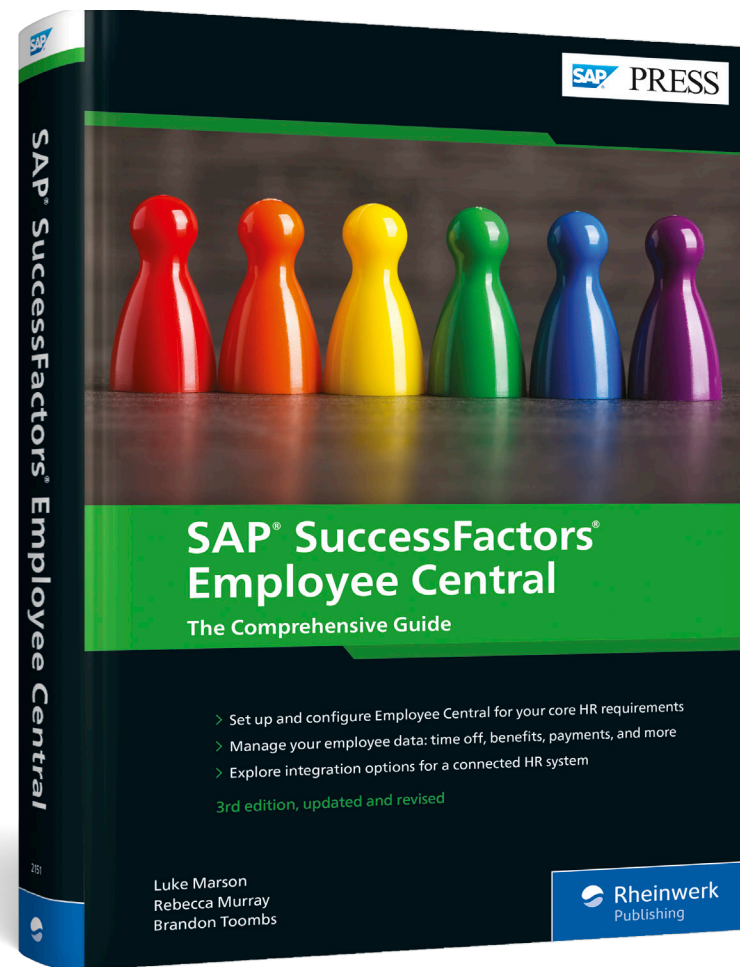
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Luke Marson is an HR transformation leader and globally recognized expert in SAP SuccessFactors human experience management suite solutions. Luke is the author of several SAP PRESS books and hundreds of blogs and articles on SAP SuccessFactors solutions, as well as an author and speaker on a wide range of HR technology topics. He is part of the SAP SuccessFactors Influencer program and works closely with SAP on various initiatives.



Rebecca Murray is an experienced HCM senior consultant who has helped companies develop and continuously maintain optimal and high-performing workforces. She is the founder and managing partner of Illumiti HCM, formerly called Cultiv8 Consulting Inc., an experienced process execution consulting firm specializing in implementing SAP SuccessFactors software. She specializes in the design and integration of talent management and ESS and MSS solutions. Rebecca helps clients across the world implement sustainable global workforce development strategies. She holds a bachelor's degree in computer engineering and a master's degree in business administration. She is also an SAP SuccessFactors certified professional consultant and a Boomi certified process developer.



Brandon Toombs is a full-time Employee Central consultant with more than 20 implementations completed to date. He formerly published Employee Central Intelligence, an Employee Central newsletter with more than 800 subscribers. He also has a YouTube channel covering Employee Central. He has more than six years of experience with SAP SuccessFactors software and more than 20 years of experience in HR technology.

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