



PUBLIC

Employee Central: Managing Alerts and Notifications

Document Details

Name	Objective	Audience
EC: Managing alerts and notifications	Explain the purpose of alerts and notifications and how to manage them effectively.	SAP SuccessFactors Customers: IT and HR professionals. SAP SuccessFactors Implementation Partners: Consultants, solution architects, and project managers

Change Log

Version	Date	Description
1.0	20.01.2020	Initial version
1.1	25.05.2020	Template adjustment and reference updated
1.2	30.06.2022	Business rules are updated with delete old pending alert.
1.22	07.09.2022	Updated business rules for the contract end date and work permit expiry date to check that the end date must be greater than the alert interval from today. Added several recommendations 6.10.9, 6.10.10 and KBA.
1.23	12.09.2022	Added 7.3 section – delete pending alerts flag
1.24	28.09.2022	Added 7.11 section – Scenario 8 and 7.12.11. Updated figure 1 with the latest home page.
1.25	03.08.2023	Formatting changes
1.5	27.02.2023	Added Scenario – Temporary worker to permanent employee

Supported Releases

Product	Release - From	Release-Valid till
SAP SuccessFactors Employee Central	1911	

Contribution

Role	Name	Organization
Author / Owner	SAP SuccessFactors Product Management	SAP SE
Author	Imelda Schwenger	HRIZONS
Contributor	Kelli Wies	PoIT
Author	Imelda Schwenger	Rizing

The recommendations in this document are based on the functionality available up to SAP SuccessFactors release mentioned above. Future functionality can impact the recommendations provided by this document. We strive to keep these recommendations up to date, however, in case you find that recent new functionality has not yet been considered in the latest version of this document, please reach out to your Customer Success Manager / Partner Delivery Manager, or send an email to SAPSuccessFactorsIDPDoc@sap.com.

Implementation Design Principles (IDPs) for SuccessFactors solutions are delivered by SAP for helping customers and partners on how to choose the most appropriate strategy and solution architecture for SuccessFactors implementations. IDPs are compiled taking into consideration the experience of many implementation projects and addressing frequent business requirements as well as real-life implementation challenges. They are continuously reviewed and updated as product functionality evolves. In addition, the reader is advised to read and familiarize with essential and additional product-related documentation which includes Implementation Guides, SAP Notes, SAP Knowledge Base Articles, and additional assets as referenced in this document, see chapter 8.

TABLE OF CONTENTS

1	WHAT'S NEW	5
2	TERMINOLOGY.....	5
3	ABSTRACT	5
4	INTRODUCTION.....	5
5	BUSINESS REQUIREMENT.....	7
5.1	FUNCTIONAL REQUIREMENTS	7
5.2	TECHNICAL REQUIREMENTS	8
5.2.1	<i>Alert Message</i>	8
5.2.2	<i>Business Rule.....</i>	9
5.2.3	<i>How to Set Up the Workflow</i>	10
5.2.4	<i>Run - Job in Provisioning</i>	10
6	SOLUTION OVERVIEW AND CONCEPTS	10
7	DETAILED SOLUTION	10
7.1	BASICS OF ALERTS AND NOTIFICATION	10
7.1.1	<i>Job – EC Alerts and Notification</i>	11
7.1.2	<i>Reading The Log from The Job</i>	12
7.2	IMPACT OF DOING CORRECTIONS ON EXISTING ALERTS	14
7.3	INFORMATION ABOUT “DELETE OLD PENDING ALERT FLAG”	16
7.4	SCENARIO 1 – ALERT DYNAMIC GROUP FOR CONTRACT END DATE IN JOB INFORMATION	17
7.4.1	<i>Alert Message</i>	17
7.4.2	<i>Dynamic Group</i>	18
7.4.3	<i>Workflow.....</i>	19
7.4.4	<i>Business Rule.....</i>	20
7.4.5	<i>Trigger.....</i>	20
7.5	SCENARIO 2 – ALERT MANAGER FOR GLOBAL ASSIGNMENT PLANNED END DATE	21
7.5.1	<i>Alert Message</i>	21
7.5.2	<i>Workflow.....</i>	21
7.5.3	<i>Business Rule.....</i>	22
7.5.4	<i>Trigger.....</i>	22
7.6	SCENARIO 3 – ALERT FOR POSITION (MDF OBJECT) END DATE IN 14 DAYS	23
7.6.1	<i>Alert Message</i>	23
7.6.2	<i>Workflow.....</i>	23
7.6.3	<i>MDFAlertType</i>	24
7.6.4	<i>Business Rule.....</i>	25
7.6.5	<i>Trigger.....</i>	25
7.7	SCENARIO 4 – MULTIPLE ALERTS FOR DRIVER’S PERMIT EXPIRED IN THREE MONTHS AND 1 MONTH.....	26
7.7.1	<i>Alert Message</i>	26
7.7.2	<i>Workflow.....</i>	26
7.7.3	<i>Business Rule.....</i>	27
7.7.4	<i>Trigger.....</i>	28
7.8	SCENARIO 5 – ALERT MANAGER FOR RETURN FROM LEAVE IN TWO DAYS	29
7.8.1	<i>Alert Message</i>	29
7.8.2	<i>Workflow.....</i>	30
7.8.3	<i>Business Rule.....</i>	30
7.8.4	<i>Trigger.....</i>	31
7.9	SCENARIO 6 – ALERTS ADMINISTRATORS FOR 25 DAYS INTO A 12-MONTH LEAVE PERIOD	31
7.9.1	<i>Alert Message</i>	31
7.9.2	<i>Workflow.....</i>	32
7.9.3	<i>Business Rule.....</i>	32

7.9.4	Trigger.....	33
7.10	SCENARIO 7 – ALERT FOR WORK ORDER END DATE IN 90 DAYS (OFF-CYCLE EVENT BATCH AND INTELLIGENT SERVICE)	33
7.10.1	Business Rule.....	33
7.10.2	Trigger.....	34
7.10.3	Schedule Job in Provisioning	34
7.11	SCENARIO 8 – ALERT TO CHECK ON EMPLOYEE ONE MONTH AND ONE WEEK AFTER HIRING/REHIRING	35
7.11.1	Alert Message	35
7.11.2	Workflow.....	35
7.11.3	Business Rule.....	36
7.11.4	Trigger.....	37
7.12	SCENARIO 9 - TEMPORARY WORKER IS CONVERTED TO A PERMANENT EMPLOYEE	38
7.13	RECOMMENDED SOLUTION.....	39
7.13.1	Multiple countries with different document types and alert days	39
7.13.2	Best way to handle Global Assignment for alerts	46
7.13.3	How to debug an alert and test	46
7.13.4	How to make sure there are no duplicates in alert object	49
7.13.5	How to avoid inactive employees	50
7.13.6	How to avoid alerts created for historical records	50
7.13.7	Orphaned alerts	50
7.13.8	How to stop alerts.....	51
7.13.9	How to avoid receiving multiple alerts.....	52
7.13.11	Deep Link to People Profile in Email Notification.....	54
8	REFERENCES.....	54

1 WHAT'S NEW

OCT 2022

- The delete pending alert explained with a real-life example.
- All relevant scenarios are now updated with the delete pending alert.
- New scenario Alert after Hire date.
- Example of using a link in alerts is added.

Aug 2023

- Formatting changes

Feb 2024

- Added scenario on Temporary worker converted to permanent employee.

2 TERMINOLOGY

The following table explains some abbreviations used in this document.

Abbreviation	Description
EC	Employee Central
ERP	SAP Enterprise Resource Planning, often referred to in the document, pertains to SAP HCM on-premise system
MDF	Meta Data Framework
RBP	Role-Based-Permissions
UI	User Interface
IDP	Implementation Design Principle
CWM	Contingent Workforce Management

3 ABSTRACT

Employee Central Alerts are period/time-based triggers based on specific conditions that create a To-Do alert or send an email notification to the user with a configured message. Notifications are pre-defined messages provided to employees/administrators that specify an approaching due date. This triggers a reminder for the users to take appropriate action that is required before the due date (in some cases after a date). Typical use cases for alerts/notifications include end of a probation period, end of the contract, retirement, expiry of work permit. Each of such alerts requires business rules to determine the conditions to send out a reminder. The reminder can be in the form of an email notification, an alert in the "To-Do Take Action tile" or both email and alert.

This IDP showcases typical business scenarios needing alerts and notifications with business rules in an efficient way. The document helps in understanding the Job for alerts. This will also provide recommendations on how to avoid some common mistakes during configuration.

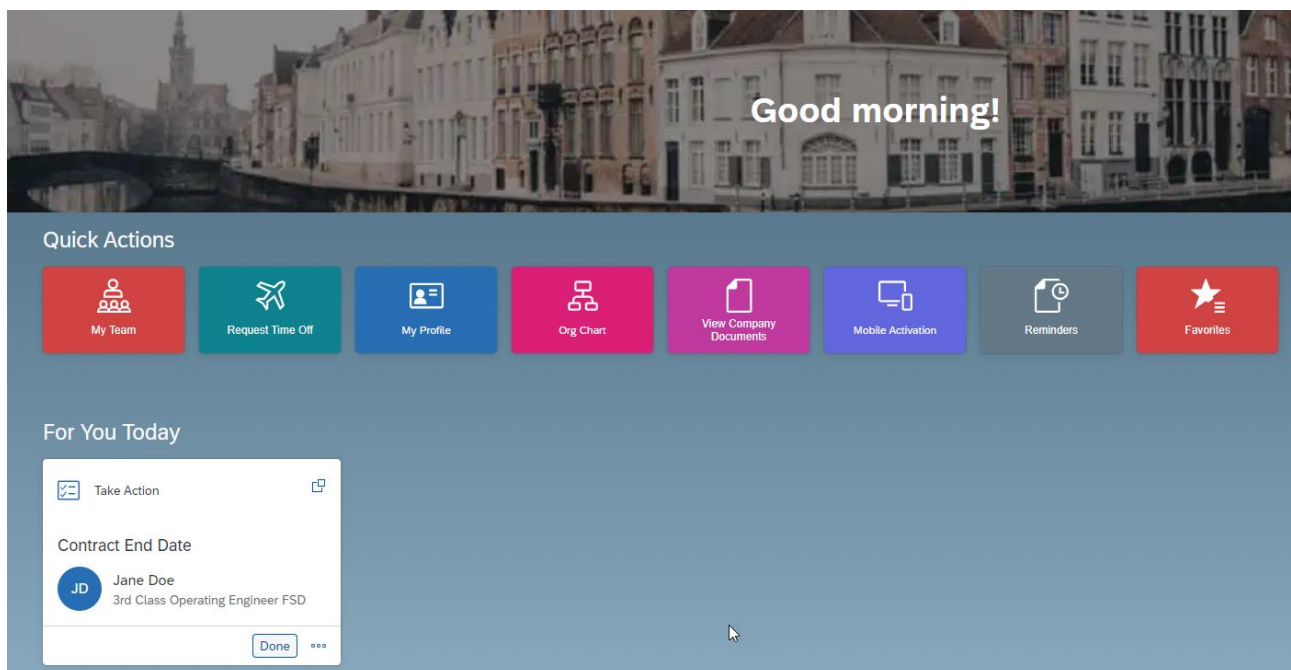
4 INTRODUCTION

Due dates can be configured and set up in different portlets. Alerts are created using business rules assigned to the supported portlet (HRIS element). They are:

- Job Information (jobInfo)

- Compensation Information (compInfo)
- Employment Details (employmentInfo)
- Work Permit Information (workPermitInfo)
- Global Assignment Details (globalAssignmentInfo)
- Recurring Payment (payComponentRecurring)
- Non-Recurring Payment (payComponentNonRecurring)

Alerts and notifications can also be created on MDF objects such as "Position", "Work Order" or custom objects. Business rules are associated with the "SaveAlert" event type for HRIS elements and "PostSave" rules for MDF Objects. When the conditions in the business rule are met, an alert is generated in the "For You Today" quick action on the Home Page or under "Take Action" under the To-Do section. An email notification can also be configured (to the CC role) to send to the users defined in the workflow.



or

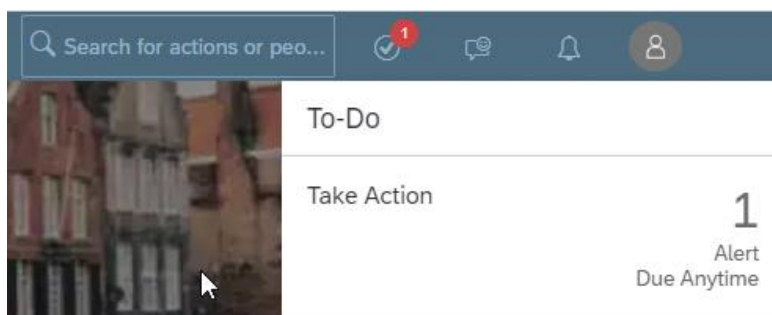


Figure 1

The portlets (objects) that do not support alerts and notifications include:

- National ID (nationalIdCard)
- Email Information (emailInfo)

- Emergency Contact (emergencyContactPrimary)
- Social Account Information
- Jobs Relationship Information (jobRelationsInfo)
- Payment Information (paymentInfo)
- Pension Payouts Information (pensionPayoutsInfo)
- Personal information (personalInfo)
- Person Information (personInfo)
- Personal Relationships Information (personRelationshipInfo)
- Phone Information (phoneInfo).

5 BUSINESS REQUIREMENT

5.1 Functional Requirements

Often users want to get a reminder that due dates are approaching. This reminder informs the HR administrators, managers, or employees to take appropriate business actions before the end date of the events occurs.

Different types of end dates can be set up in different portlets, and notifications can be triggered based on the end dates.

Here are some of the common scenarios where alerts can be useful:

Scenario	Alert on Object	Action Triggered
1	Job Information - Contract End Date	Create an alert and email notifications to two dynamic groups 14 days before Contract End Date.
2	Global Assignment – Planned End Date	Alert a manager 5 days before the global assignment ends for the direct report. The alert helps to prepare the employee to return to the home assignment.
3	Position (MDF Object) – custom date field	Send an alert to a manager and a dynamic group 14 days before the end date of a temporary unapproved position. The position can either be extended or converted to a permanent position.
4	Work Permit Expiry Date	Trigger multiple alerts before the work permit expires. One alert is sent 3 months before and another alert 1 month before the expiry date. Multiple alerts help to ensure legal documents are renewed in time to avoid time gaps in the work permits.
5	Time Off – Return from Leave	A manager receives an alert 2 days before the direct report returns from a paid leave.
6	Time Off – Duration of Leave	An alert is sent when an employee has reached 25 days into a 12-month leave. The alert is used to monitor leaves that have reached a threshold.

7	Work Order End Date	An alert is triggered when the work order ends in 90 days using the Off-Cycle Event Batch.
8	Employment Details	An alert is created when the employee has been hired/rehired for month and 1 week. This allows the manager to check on the employee.

5.2 Technical Requirements

5.2.1 Alert Message

Create the alert message in the transaction Manage Data that will be displayed to the alert receiver. This message is displayed in the email notification and in the alert when the user clicks on the To-Do Take Action tile on Home Page. Alert messages also support translations using the localized fields "alertHeaderLocalized" and "alertDescriptionLocalized" defined on the alert message object.

5.2.1.1 Available Tags for Alert Messages

The below table shows the different tags that can be used for alert messages.

Tag Name	Description	Subject Data Type
[[EFFECTIVE_DATE]]	Effective date when data changes come into effect	<ul style="list-style-type: none"> EC data MDF person-based data MDF object-based data
[[END_DATE]]	Time off end date	<ul style="list-style-type: none"> Time off
[[EVENT_REASON]]	Event reason for the workflow	<ul style="list-style-type: none"> EC data
[[OBJECT_NAME]]	Object name	<ul style="list-style-type: none"> MDF object-based data
[[OBJECT_TYPE]]	Object types such as position, benefits claims, timesheet	<ul style="list-style-type: none"> MDF person-based data MDF object-based data
[[START_DATE]]	Time off start date	<ul style="list-style-type: none"> Time off
[[SUBJECT_USER]]	Name of the subject user the alert is for	<ul style="list-style-type: none"> EC data MDF person-based data Time off
[[TIME_OFF_STATUS]]	Time off status (pending/pending approval/canceled)	<ul style="list-style-type: none"> Time off
[[TIME_OFF_TYPE]]	Time off type	<ul style="list-style-type: none"> Time off
[[VIEW_BLOCK_ON_PROFILE]]	Deep link to block page of People Profile	<ul style="list-style-type: none"> EC data

5.2.1.2 Modify Length of Alert Message

The default length of the alert message is 255 characters long. You can increase it to a maximum of 4000 characters. In **Configure Object Definition**, go to Alert Message object. Change the field length of field "alertDescription" and field "alertDescriptionLocalized" to 4000.

5.2.1.3 Alert Message in Rich Text Format

Alert Message supports HTML tags so that font size, bolding, italics, and color can be customized.

Alert Message: Contract_EndDate (CONTRACT_ENDDATE)

Take Action ▾

Name Contract_EndDate

* External Code CONTRACT_ENDDATE

* Effective Status Active

Alert Header Contract End Date

Alert Description <p style="font-family:Arial;color:Blue;fontsize:12px;"> Contract End Date for </p> [[SUBJECT_USER]] <p style="font-family:Arial;color:Blue;fontsize:20px;"> is less than 14 days away, please decide appropriate action.</p>

* Localised Header Contract End Date ? ?

* Localised Description <p style="font-family:Arial;color:Blue;fontsize:12px;"> Contract End Date for</p> [[SUBJECT_USER]] <p style="font-family:Arial;color:Blue;fontsize:20px;"> is less than 14 days away, please decide appropriate action.</p> ?

Take Action

✓

=

Contract End Date for

David Douglas

is less than 14 days away, please decide appropriate action.

I Have Finished

No Due Date

5.2.2 Business Rule

Build a business rule to define the condition that triggers the alert. Determine the best way to configure the business rule with performance in mind. Use the scenario "Generate Alerts" and select the appropriate base object. Note that in this case, the "Alert object" is already selected as a second parameter.

Use the same base object that matches the HRIS element.

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

If there are different deciding factors in the business rule, using a lookup table may be more efficient. For example, if one country requires the alert to be sent ten days before the due date, another country requires the alert 15 days. Instead of creating multiple conditions in the rule, create a lookup table with the number of days for each corresponding country.

5.2.3 How to Set Up the Workflow

Like a workflow for a transactional approval such as Promotion, an alert workflow is created in **Manage Organization, Pay, and Job Structures**. To create an alert in the To-Do "Take Action" tile, add approver(s) to the step(s) in the workflow. If an email notification is needed, define it in the CC role. To receive both an alert and an email, configure the approvers in the steps as well as the CC role. The workflow is used only for routing purposes, and no workflow approval occurs. The approvers get an alert in the To-Do Take Action card, and the cc roles get an email notification.

5.2.4 Run - Job in Provisioning

The recurring job "EC Alerts and Notifications" must be set up in Provisioning to run at least once a day in the instance.

Set up a one-time job to run the EC Alerts and Notifications for the first time. Use a reasonable date that is not too far back in the past. Once the alert is created correctly, schedule a recurring job after this to check for data changes since the last successful run.

The job owner of this job "EC Alerts and Notifications" in Provisioning should be the super administrator in the system.

6 SOLUTION OVERVIEW AND CONCEPTS

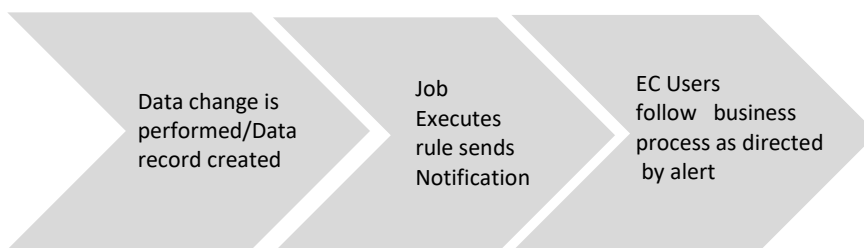


Figure 2

- Often users can be overwhelmed by the number of alerts and emails. With careful consideration, determine the essential alerts that must be required to complement the business processes in the organization. Only set up the relevant reminders that are necessary for the appropriate actions. Otherwise, users may end up ignoring the many alerts and notifications which may fill up the For You Today "Take Action" or the email inbox.
- List and document all the alerts by portlet (object), by type, by country, by the number of days/months, by alert message, by the workflow in a table. In this format, if any two or more rows contain the same information, it indicates that some of the alerts are redundant and can be eliminated.

7 DETAILED SOLUTION

7.1 Basics of Alerts and Notification

It is important to understand the main components of the alerts and notifications:

- Alert Object
This object stores:
 - Alert message – The message that must be sent for that alert.
 - Workflow – This determines all the end-users for whom the notifications must be sent.

- Effective Date – The date on which the alert message is to be sent
- Business Rule
This is used to select the record used to create the instance of the alert object.
- EC Alerts and Notifications Job
This Job is run every day which executes the business rules that are attached to the portlets as "saveAlert" rules. It is also responsible for sending the alerts to the end-users for records that match the job run date already in the alert object. If the data change of the due date requires approval, the alert is created only after the workflow is completed.

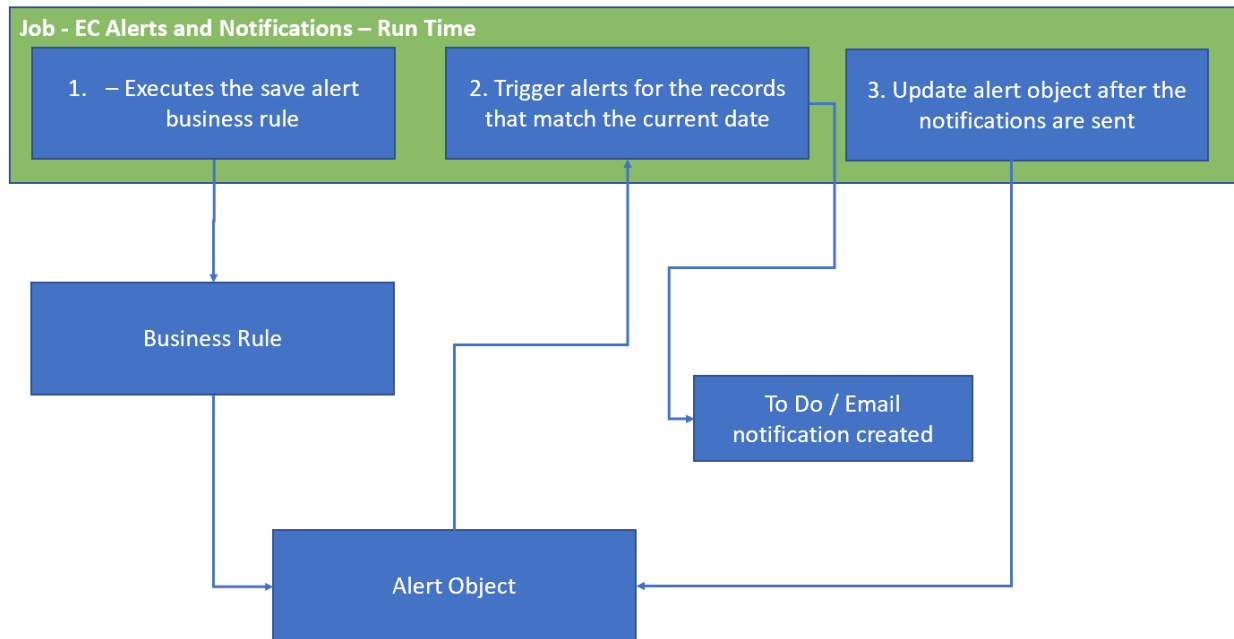


Figure 3

7.1.1 Job – EC Alerts and Notification

The crux of the whole concept of EC Alerts and Notifications depends on the Job for alerts and notifications. Often it is a misnomer that the business rule for alerts is called when the portlet is saved, but this is not always true. The business rules for alerts are executed when the Job is run for the portlets based on HRIS elements like Job Info. For MDF-based alert events, the rules are processed on the "Post Save" event.

There are three major steps of the Job:

1. Execute the business rules for Alerts

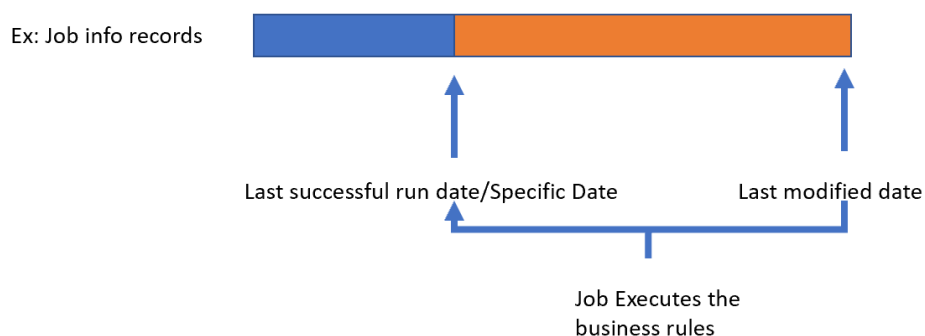


Figure 4

This goes through the portlets that are supported, picks up those records that are between the "last successful run date" and the "last modified date", and the IF condition is evaluated in all the alert business rules. When the condition is met, the Job creates an alert.

2. Trigger the alerts/notifications

In addition, the Job compares system-date with the alerts that are due. If it is due, it sends out the alerts in the To-Do "Take Action" tile and the email notifications to the appropriate users as defined in the workflow.

3. Update the Alert objects for which the notifications have been sent

Once the email notifications/To-Do list has been sent, those records should be marked as sent (updates the status of the pending alert to completed) in the alert object. The Job also picks up the MDF alerts in the alert object and creates the notifications for them when the job run date matches an alert effective day.

Recommendations on running the Job.

* Job Name:	EC Alerts and Notifications
* Job Owner:	sfadmin
* Job Type:	EC Alerts and Notifications
Job Parameters:	Modified date since <input checked="" type="radio"/> Last successful EC Alert job run date(MM/dd/yyyy): 12/05/2018 <input type="radio"/> Specify a date: (We strongly suggest the option be selected only for running job once!) (MM/dd/yyyy): <input type="text"/>

Figure 5

- 1. First Time only:** When the Job is run for the first time (specify a date) in the system, schedule a one-time job by specifying a reasonable start date. Please note that if the Job is scheduled to date significantly in the past, the Job can take longer to execute.
- 2. Setting after the first run:** After the first Job, you can change the date to the Last successful EC Alert job run date. If you choose to run from the Last successful EC Alert job run date, the Job will scan the records that are updated after the last successful run date of the Job.

7.1.2 Reading The Log from The Job

When the Job is set up for alerts and notifications, it is valuable if we have understood the log that is generated from the Job. The Job starts, and the first important field that is read as per the configuration is the Job Run Date – which is either a specific date or the last successful run date.

Run Details			
Extended Job Run Details			
Run Details	Job successfully completed.	2019-11-22 15:12:22.84	Completed
	ecAlertsAndNotificationsjob just finish execution:	2019-11-22 15:12:22.824	In Progress
	Total time EC Alert and Notification took to finish = 00 min(s) 01 second(s)	2019-11-22 15:12:22.81	In Progress
	Processing of EC Alerts finished for JOB_INFO = 1 EC alerts triggered, 0 To-Dos created, 0 emails sent, No error messages. Total time took EC Alerts to process 00 min(s) 00 second(s)	2019-11-22 15:12:22.78	In Progress
	Processing of EC Alerts started for JOB_INFO = 1 alerts checked	2019-11-22 15:12:22.427	In Progress
	CreateECAlert has ERROR! = No active rule slice is found for effective date '2019-11-22' and externalCode 'work_permit_alert'	2019-11-22 15:12:22.401	In Progress
	Creation of EC Alert for WORK_PERMIT_INFO started = 0 records checked	2019-11-22 15:12:22.378	In Progress
	Creation of EC Alert for COMP_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:22.357	In Progress
	Creation of EC Alert for COMP_INFO started = 0 records checked	2019-11-22 15:12:22.33	In Progress
	Creation of EC Alert for JOB_INFO completed for following rules = For Rule [ContractEndDateAlert]: 4 records match rules, 4 alerts created, No error messages. Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:22.308	In Progress
	Creation of EC Alert for JOB_INFO started = 5 records checked	2019-11-22 15:12:21.663	In Progress
	Creation of EC Alert for ASSIGNMENT_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:21.643	In Progress
	Creation of EC Alert for ASSIGNMENT_INFO started = 0 records checked	2019-11-22 15:12:21.619	In Progress
	Creation of EC Alert for EMPLOYMENT_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:21.599	In Progress
	Creation of EC Alert for EMPLOYMENT_INFO started = 0 records checked	2019-11-22 15:12:21.574	In Progress
	EC Alert for All Entities Creation started on Date: Thu Nov 21 00:00:00 EST 2019	2019-11-22 15:12:21.555	In Progress
	ecAlertsAndNotificationsjob is initialized	2019-11-22 15:12:21.532	In Progress
		2019-11-22 15:12:21.45	Started

Job Run Date

Figure 6

Run Details			
Extended Job Run Details			
Run Details	Job successfully completed.	2019-11-22 15:12:22.84	Complete
	ecAlertsAndNotificationsjob just finish execution:	2019-11-22 15:12:22.824	In Progress
	Total time EC Alert and Notification took to finish = 00 min(s) 01 second(s)	2019-11-22 15:12:22.81	In Progress
	Processing of EC Alerts finished for JOB_INFO = 1 EC alerts triggered, 0 To-Dos created, 0 emails sent, No error messages. Total time took EC Alerts to process 00 min(s) 00 second(s)	2019-11-22 15:12:22.78	In Progress
	Processing of EC Alerts started for JOB_INFO = 1 alerts checked	2019-11-22 15:12:22.427	In Progress
	CreateECAlert has ERROR! = No active rule slice is found for effective date '2019-11-22' and externalCode 'work_permit_alert'	2019-11-22 15:12:22.401	In Progress
	Creation of EC Alert for WORK_PERMIT_INFO started = 0 records checked	2019-11-22 15:12:22.378	In Progress
	Creation of EC Alert for COMP_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:22.357	In Progress
	Creation of EC Alert for COMP_INFO started = 0 records checked	2019-11-22 15:12:22.33	In Progress
	Creation of EC Alert for JOB_INFO completed for following rules = For Rule [ContractEndDateAlert]: 4 records match rules, 4 alerts created, No error messages. Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:22.308	In Progress
	Creation of EC Alert for JOB_INFO started = 5 records checked	2019-11-22 15:12:21.663	In Progress
	Creation of EC Alert for ASSIGNMENT_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:21.643	In Progress
	Creation of EC Alert for ASSIGNMENT_INFO started = 0 records checked	2019-11-22 15:12:21.619	In Progress
	Creation of EC Alert for EMPLOYMENT_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:21.599	In Progress
	Creation of EC Alert for EMPLOYMENT_INFO started = 0 records checked	2019-11-22 15:12:21.574	In Progress
	EC Alert for All Entities Creation started on Date: Thu Nov 21 00:00:00 EST 2019	2019-11-22 15:12:21.555	In Progress
	ecAlertsAndNotificationsjob is initialized	2019-11-22 15:12:21.532	In Progress
		2019-11-22 15:12:21.45	Started

Number of records in Job info that the Job Picked up. For these the rules will be executed

Figure 7

Run Details			
Extended Job Run Details			
Job successfully completed.	2019-11-22 15:12:22.84	Completed	
ecAlertsAndNotificationsjob just finish execution:	2019-11-22 15:12:22.824	In Progress	
Total time EC Alert and Notification took to finish = 00 min(s) 01 second(s)	2019-11-22 15:12:22.81	In Progress	
Processing of EC Alerts finished for JOB_INFO = 1 EC alerts triggered, 0 To-Dos created, 0 emails sent, No error messages. Total time took EC Alerts to process 00 min(s) 00 second(s)	2019-11-22 15:12:22.78	In Progress	
Processing of EC Alerts started for JOB_INFO = 1 alerts checked	2019-11-22 15:12:22.427	In Progress	
CreateECAlert has ERROR! = No active rule slice is found for effective date '2019-11-22' and externalCode 'work_permit_alert'	2019-11-22 15:12:22.401	In Progress	
Creation of EC Alert for WORK_PERMIT_INFO started = 0 records checked	2019-11-22 15:12:22.378	In Progress	
Creation of EC Alert for COMP_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:22.357	In Progress	
Creation of EC Alert for COMP_INFO started = 0 records checked	2019-11-22 15:12:22.33	In Progress	
Creation of EC Alert for JOB_INFO completed for following rules = For Rule [ContractEndDateAlert]: 4 records match rules, 4 alerts created, No error messages. Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:22.308	In Progress	
Creation of EC Alert for JOB_INFO started = 5 records checked	2019-11-22 15:12:21.663	In Progress	
Creation of EC Alert for ASSIGNMENT_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:21.643	In Progress	
Creation of EC Alert for ASSIGNMENT_INFO started = 0 records checked	2019-11-22 15:12:21.619	In Progress	
Creation of EC Alert for EMPLOYMENT_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:21.599	In Progress	
Creation of EC Alert for EMPLOYMENT_INFO started = 0 records checked	2019-11-22 15:12:21.574	In Progress	
EC Alert for All Entities Creation started on Date: Thu Nov 21 00:00:00 EST 2019	2019-11-22 15:12:21.555	In Progress	
ecAlertsAndNotificationsjob is initialized	2019-11-22 15:12:21.532	In Progress	
	2019-11-22 15:12:21.45	Started	

Number of records that the rule matched and created alerts

Figure 8

Run Details			
Extended Job Run Details			
Job successfully completed.	2019-11-22 15:12:22.84	Completed	
ecAlertsAndNotificationsjob just finish execution:	2019-11-22 15:12:22.824	In Progress	
Total time EC Alert and Notification took to finish = 00 min(s) 01 second(s)	2019-11-22 15:12:22.81	In Progress	
Processing of EC Alerts finished for JOB_INFO = 1 EC alerts triggered, 0 To-Dos created, 0 emails sent, No error messages. Total time took EC Alerts to process 00 min(s) 00 second(s)	2019-11-22 15:12:22.78	In Progress	
Processing of EC Alerts started for JOB_INFO = 1 alerts checked	2019-11-22 15:12:22.427	In Progress	
CreateECAlert has ERROR! = No active rule slice is found for effective date '2019-11-22' and externalCode 'work_permit_alert'	2019-11-22 15:12:22.401	In Progress	
Creation of EC Alert for WORK_PERMIT_INFO started = 0 records checked	2019-11-22 15:12:22.378	In Progress	
Creation of EC Alert for COMP_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:22.357	In Progress	
Creation of EC Alert for COMP_INFO started = 0 records checked	2019-11-22 15:12:22.33	In Progress	
Creation of EC Alert for JOB_INFO completed for following rules = For Rule [ContractEndDateAlert]: 4 records match rules, 4 alerts created, No error messages. Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:22.308	In Progress	
Creation of EC Alert for JOB_INFO started = 5 records checked	2019-11-22 15:12:21.663	In Progress	
Creation of EC Alert for ASSIGNMENT_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:21.643	In Progress	
Creation of EC Alert for ASSIGNMENT_INFO started = 0 records checked	2019-11-22 15:12:21.619	In Progress	
Creation of EC Alert for EMPLOYMENT_INFO completed for following rules = Total time took for EC Alert creation to complete = 00 min(s) 00 second(s)	2019-11-22 15:12:21.599	In Progress	
Creation of EC Alert for EMPLOYMENT_INFO started = 0 records checked	2019-11-22 15:12:21.574	In Progress	
EC Alert for All Entities Creation started on Date: Thu Nov 21 00:00:00 EST 2019	2019-11-22 15:12:21.555	In Progress	
ecAlertsAndNotificationsjob is initialized	2019-11-22 15:12:21.532	In Progress	
	2019-11-22 15:12:21.45	Started	

Number of notifications sent

Figure 9

7.2 Impact of Doing Corrections on Existing Alerts

Typical questions on data corrections with respect to alerts are:

- What happens to the existing alerts when a correction is done?
- Would the recipients get two alerts, one for the old date and one for the corrected date?

To answer these questions, let us take a simple scenario to illustrate the behavior with examples.

Scenario: An alert must be sent 30 days before the end of the contract.

Note: The rule that is used for this purpose is explained below in section 7.4.3.

The records in Job Info are like this:

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15- Sep-2019	Data change	17-Jan-2020
88178	Geoff Hill	22- Nov-2019	Transfer	26-Jan-2020

After the alerts job is run, the records in the Alert object would be like this (assume that the Job runs on 21-Nov-2019):

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2019	ContractRuleEnd	18-Dec-2019
Job Info	Geoff Hill	22-Nov-2019	ContractRuleEnd	27-Dec-2019

So now, if you correct the first record, the contract end date is due to 21-Jan-2020. Job info would be like the below table:

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15-Sep-2019	Data change	21-Jan-2020
88178	Geoff Hill	22-Nov-2019	Transfer	26-Jan-2020

Note that this will cause a correction to the existing record in the Alert table and not a new alert record.

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2019	ContractRuleEnd	22-Dec-2019
Job Info	Geoff Hill	22-Nov-2019	ContractRuleEnd	27-Dec-2019

In the above scenario, if there was another record in the Job Info but the contract date was not changed in that time slice.

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15-Sep-2019	Data change	21-Jan-2020
88178	Geoff Hill	22-Nov-2019	Transfer	26-Jan-2020
88178	Geoff Hill	29-Nov-2019	Transfer	26-Jan-2020

If the rules are designed in such a way that in the "if condition" that this record will be considered only when the previous value of the contract end date is not equal to the current value of the contract end date, then the alert for the new time slice with the event date 29-Nov-2019 will not be created.

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2019	ContractRuleEnd	22-Dec-2019
Job Info	Geoff Hill	22-Nov-2019	ContractRuleEnd	27-Dec-2019

Scenario 2: An alert must be sent in 30 and 15 days.

For this scenario, 2 rules are required. Let us assume "ContractRuleEnd" sets the alert to 30 days before the contract end date and the 2nd rule "ContractRuleEnd2" sets the alert to 15 days before the alert object.

Following represents the Job info records:

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15-Sep-2019	Data change	21-Jan-20
88178	Geoff Hill	22-Nov-2019	Transfer	26-Jan-20

This will create the alert as listed in the table below. Since the object is being written by 2 rules it is creating new records for the new rule.

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2019	ContractRuleEnd	22-Dec-2019
Job Info	Geoff Hill	22-Nov-2019	ContractRuleEnd	27-Dec-2019
Job Info	Geoff Hill	15-Sep-2019	ContractRuleEnd2	6-Jan-2020
Job Info	Geoff Hill	22-Nov-2019	ContractRuleEnd2	11-Jan-2020

7.3 Information About "Delete Old Pending alert flag"

The previous section demonstrated the on what is the effect of correcting an existing alert. This section gives more information on when a new time slice is introduced on the HRIS element like Job information, and the field value that determines the alert is changed in the new time slice and remains unaltered in the previous time slice.

Let us take the example of the contract end date like the previous section.

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15- Sep-2021	New hire	15-Sep-2022

Scenario 1: An alert must be sent 1 month before the end of the contract.

After the alerts job is run, the records in the Alert object would be like this (assume that the Job runs on 16-Sep-2021):

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2021	ContractRuleEnd	15-Aug-2022

Now let us add a new time slice in the Job Information and contract change as the event reasons on 1-Jan-2022, and the new contract end date is 20-Oct -2022. The Job Information records would look like the table shown below.

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15- Sep-2021	New hire	15-Sep-2022
88178	Geoff Hill	1-Jan-2022	Contract Change	20-Oct-2022

After the alerts job is run, the records in the Alert object would be like below (assume that the Job runs on 2-Jan-2022).

If "Delete Old Pending alert flag" is set to Yes in the Business Rule, then the row highlighted in yellow will be deleted, and only one alert in the second row will be sent.

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2021	ContractRuleEnd	15-Aug-2022 -> Deleted
		1-Jan-2022	Contract Change	20-Sep-2022

If "Delete Old Pending alert flag" is set to No in the Business Rule, then it will send two alerts, one on 15-Aug and the other on 20-Sep-2022.

Scenario 2 – New time slice and correction. An alert must be sent 1 month before the end of the contract.

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15- Sep-2021	New hire	15-Sep-2022

After the alerts job is run, the records in the Alert object would be like this (assume that the Job runs on 16-Sep-2021):

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2021	ContractRuleEnd	15-Aug-2022

Now the same record is corrected (no time slice is added, but the new hire record is corrected) on Dec 1st, 2021. The Job runs after this change.

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15- Sep-2021	New hire	23-Nov-2022

The alert entry will look like the one below. This will be corrected (irrespective of whether the "Delete Old Pending alert flag" is set to Yes or No).

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2021	ContractRuleEnd	23-Oct-2022

Now let us add a new time slice in the Job Information with contract change as the event reasons on the 1-Jan-2022, and the new contract end date is 1-Dec-2022. The job information records would look like the table shown below.

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15- Sep-2021	New hire	23-Nov-2022
88178	Geoff Hill	1-Jan-2022	Contract Change	01-Dec-2022

If "Delete Old Pending alert flag" is set to Yes in the Business Rule, then the row highlighted in yellow will be deleted, and only one alert that is in the second row will be sent.

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2021	ContractRuleEnd	23-Oct-2022 -> Deleted
		1-Jan-2022	ContractRuleEnd	01-Nov-2022

If "Delete Old Pending alert flag" is set to No in the Business Rule, then it will send 2 alerts one on 23-Oct and the other on 01-Nov-2022.

7.4 Scenario 1 – Alert Dynamic Group for Contract End Date in Job Information

In this example, an alert is triggered 14 days before the end of a Contract and a notification is sent to users in two dynamic groups. Both an alert is created in the To-Do section as well an email notification is sent.

7.4.1 Alert Message

- In Admin Center -> Manage Data, specify the alert message by entering the alert header and text.

The screenshot shows the 'Manage Data' interface. At the top, there's a search bar with 'Alert Message' selected and 'Contract End Date (CONTRACT_EN...)' entered. To the right is a 'Create New' button and a 'No Selection' dropdown. Below the search bar, the title is 'Alert Message: Contract End Date (CONTRACT_END_DATE)' with a 'Take Action' dropdown. The main content area lists several fields: Name (Contract End Date), External Code (CONTRACT_END_DATE), Effective Status (Active), Alert Header (Contract End Date), Alert Description (Contract End Date), Localised Header (Contract End Date), and Localised Description (Contract End Date for [[SUBJECT_USER]] is less than 14 days away, please decide appropriate action.). At the bottom right, it says 'Updated by HRZAdmin1 on Monday, 12 August 2019 19:43:33 EDT'.

Figure 10

7.4.2 Dynamic Group

- In **Manage Workflow Group**, create a dynamic group HR_RECRUIT_GROUP which includes a group of recruitment users.

The screenshot shows the 'Group Definition' interface. At the top, it says 'Type a name for your group. Then choose who you want to include in the group.' Below this, the 'Group Name' field contains 'HR_RECRUIT_GROUP'. To the right, there's a 'Group Membership' box showing '3' and an 'Update' button. The main section is titled 'Choose Group Members:' with a tip: 'Tip: You can include multiple People Pools in the same group. See examples'. Under 'People Pool', there's a dropdown menu set to 'User' and a text input field containing 'Anthony Allyne, Carly Charles, David Douglas'. Below this, there's an 'Add another category' link and another 'People Pool' section with an 'Add another category' link and an 'Add another People Pool' link. At the bottom, there's a red-shaded section titled 'Exclude these people from the group:' with a 'People Pool' dropdown set to 'Pick a category', an 'Add another category' link, and an 'Add another People Pool' link. At the bottom right, there are 'Finished' and 'Cancel' buttons.

Figure 11

- Create another group called HR_ADMIN_GROUP that includes 4 HR administrators.

Group Definition ✕

Type a name for your group. Then choose who you want to include in the group.

Group Name:

Group Membership
4
Update

Choose Group Members: Tip: You can include multiple People Pools in the same group. [See examples](#)

▼ **People Pool**

User

[Eleanor Edwards](#), [Faye Francis](#), [Hayden Harrison](#), [Ivan Ito](#)

✕

Add another category
[Add another People Pool](#)

Exclude these people from the group:

▼ **People Pool**

Pick a category

✕

Add another category
[Add another People Pool](#)

Finished
Cancel

Figure 12

7.4.3 Workflow

- In "Manage Organization, Pay and Job Structures" transaction, set up the workflow. In this example, the alert is sent to the dynamic groups HR_RECRUIT_GROUP and HR_ADMIN_GROUP. They are specified in Step 1 and Step 2 as recipients of alerts. To send an email to both groups, they are also defined in the CC Role section. As a result, all three recruitment users and all four HR Administrators will get an alert in the Take Action tile as well as an email notification.

Manage Organisation, Pay and Job Structures

Search : Advanced

Create New :

Workflow: End Date Alert (END_DATE_ALERT) Take Action ▼

Workflow ID		END_DATE_ALERT					
Name		End Date Alert ⓘ					
Description							
Remind In Days							
Is Delegate Supported		No					
Alternate Workflow							
Redirect CC Users to Workflow Approval Page		No					

Step 1

Approver Type	Approver Role ⓘ	Context ⓘ	Edit Transaction ⓘ	No Approver Behaviour	Relationship to Approver	Respect Permission	Workflow Email Configuration
Dynamic Group	HR_RECRUIT_GROUP		No Edit	Skip this Step		Yes	

Step 2

Approver Type	Approver Role ⓘ	Context ⓘ	Edit Transaction ⓘ	No Approver Behaviour	Relationship to Approver	Respect Permission	Workflow Email Configuration
Dynamic Group	HR_ADMIN_GROUP		No Edit	Skip this Step		Yes	

Contributors

No data for Contributors available or you do not have the necessary permission.

Cc Role

Cc Role Type	Cc Role ⓘ	Relationship to Approver ⓘ	Context ⓘ	Respect Permission	Email Template Group ⓘ
Dynamic Group	HR_RECRUIT_GROUP			Yes	No Selection
Dynamic Group	HR_ADMIN_GROUP			Yes	No Selection

Updated by HRAdmin1 on Monday, 12 August 2019 19:54:22 EDT

Figure 13

7.4.4 Business Rule

- **Go to Configure Business Rules**, and assign the workflow and message to the business rule. The condition in this scenario is to create an alert 14 days before the contract ends. The alert is created when the contract end date has been changed for an active employee, and if today's date is more than 14 days before the contract end date. It checks for future records (event date after today) or current records where the event start date was in the past, and the contract end date is at least 14 days away from today, and it fulfills the criteria to trigger the alert. The alert is triggered exactly 14 days before the contract end date.

Contract End Date Alert (CONTRACT_END_DATE_ALERT)

Scenario: Basic [Change Scenario](#)

Basic Information

Start Date 01/01/1900

Rule Type

Description

Parameters

Name	Object
Context	System Context
Job Information Model	Job Information Model
Alert	Alert

Variables

If

and

Job Information Model.Contract End Date.Value is not equal to Job Information Model.Contract End Date.Previous Value

Job Information Model.Contract End Date.Value is not equal to Null

or

and

Job Information Model.Event Date.Value is before Today()

Job Information Model.Contract End Date.Value is on or after Date Plus()

Base Date: Today()
(Optional) Number of Months: Null
(Optional) Number of Days: 14

Job Information Model.Event Date.Value is after Today()

Then

Set Alert.Workflow Information to be equal to End Date Alert(END_DATE_ALERT)

Set Alert.Delete Old Pending Alert Flag to be equal to Yes

Set Alert.Effective Date to be equal to Date Plus()

Base Date: Job Information Model.Contract End Date.Value
(Optional) Number of Months: Null
(Optional) Number of Days: -14

Set Alert.Alert Message to be equal to Contract End Date (CONTRACT_END_DATE)

Figure 14

7.4.5 Trigger

- **In Manage Business Configuration**, under Trigger Rules section, add the business rule created in the previous step to HRIS-Element Job Information (jobInfo) as Event Type saveAlert.

20

Back to: Admin Centre

Employee Central > HRIS Elements > jobInfo

Employee Central

HRIS Elements

- comInfo
- directDeposit
- emailInfo
- emergencyContactPrimary
- employmentInfo
- globalAssignmentInfo
- globalInfo
- homeAddress
- imInfo
- jobInfo
- jobRelationsInfo

HRIS Fields

* Identifier **jobInfo**

Label

Default Label

Enabled

Trigger Rules

Base Object	* Event Type	* Rules	Enabled	(1) More
Job Information Model	saveAlert	Contract End Date Alert (CONTR...	Yes	Details

- Note that if the contract end date is extended before it expires, the original alert is deleted. A new alert based on the new contract end date becomes the active alert.

7.5 Scenario 2 – Alert Manager for Global Assignment Planned End Date

In this scenario, a manager receives an alert five days before the direct report plans to end the global assignment.

7.5.1 Alert Message

- In Admin Center -> Manage Data, specify the alert message by entering the alert header and text.

Manage Data

Search [Advanced](#) [Create New](#)

Alert Message: Global Assignment Planned End Date (GA_END_DATE) [Take Action](#)

Name	Global Assignment Planned End Date
* External Code	GA_END_DATE
* Effective Status	Active
Alert Header	Global Assignment Planned End Date
Alert Description	
* Localised Header	Global Assignment Planned End Date
* Localised Description	Global Assignment End Date for [[SUBJECT_USER]] is less than 5 days away, please decide appropriate action

Updated by HRZAdmin1 on Monday, 2 September 2019 21:22:14 EDT

Figure 15

7.5.2 Workflow

- In Admin Center -> Manage Organization, Pay and Job Structures, set up the workflow. In this example, the alert is sent to the manager who is set up in Step 1. No email notification is sent out as no CC role is defined.

Manage Organisation, Pay and Job Structures

Search : No Selection No Selection Create New : No Selection

Workflow: Global Assignment End Date (GlobalAssign_EndDate_WF) Take Action

Workflow ID: GlobalAssign_EndDate_WF
Name: Global Assignment End Date
Description:
Remind In Days: 2
Is Delegate Supported: No
Alternate Workflow:
Redirect CC Users to Workflow Approval Page: No

Step 1

Approver Type	Approver Role	Context	Edit Transaction	No Approver Behaviour	Relationship to Approver	Respect Permission	Workflow Email Configuration
Role	Manager	Source	No Edit	Skip this Step	Employee	Yes	

Contributors

No data for Contributors available or you do not have the necessary permission.

Cc Role

No data for Cc Role available or you do not have the necessary permission.

Updated by HRZAdmin1 on Monday, 2 September 2019 21:32:46 EDT

Figure 16

7.5.3 Business Rule

- Go to Configure Business Rules, and assign the workflow and message to the business rule. In this scenario, the manager is given an alert 5 days before the Global Assignment Planned End Date is due. The IF condition checks that the rule is only executed if the event reason is Add Global Assignment, and it has a start date after today to avoid creating alert for historical events.

Global Assignment End Alert (GA_Alert)

Scenario: Basic [Change Scenario](#)

Basic Information

Start Date: 01/01/1900

Rule Type

Description

Parameters

Name	Object
Context	System Context
Job Information	Job Information
Alert	Alert

☒ Variables

☒ If

Job Information.Event Reason is equal to End Global Assignment (EGA)

Then

Set Alert.Delete Old Pending Alert Flag to be equal to Yes

Set Alert.Alert Message to be equal to Global Assignment Planned End Date (GA_END_DATE)

Set Alert.Workflow Information to be equal to Global Assignment End Date (GlobalAssign_EndDate_WF)

Set Alert.Effective Date to be equal to Date Plus()

Base Date: Job Information.Event Date

(Optional) Number of Months: 0

(Optional) Number of Days: -5

Figure 17

7.5.4 Trigger

- In **Manage Business Configuration** under Trigger Rules section, add the business rule created in the previous step to HRIS-Element Global Assignment Information (globalAssignmentInfo) as Event Type saveAlert.

Employee Central HRIS Elements globalAssignmentInfo

Identifier: globalAssignmentInfo

Label: Global Assignment Det

Default Label: Global Assignment Det

Enabled: Yes

HRIS Fields

Identifier	Label	Enabled	Mandatory	(18) More
assignment-type	Assignment Type	Yes	Yes	Details
start-date	Start Date	Yes	Yes	Details
planned-end-date	Planned End Date	Yes	Yes	Details
company	Company	Yes	Yes	Details
end-date	Actual End Date	Yes	Yes	Details
No Selection	Click or focus to edit	No	No	Details

Trigger Rules

Base Object: Global Assignment Details

Event Type: saveAlert

Rules: Global Assignment End Alert

Enabled: Yes

(1) More

Figure 18

7.6 Scenario 3 – Alert for Position (MDF Object) End Date in 14 days

When a temporary position ends in 14 days, an alert is created in the To-Do section of the employee who is incumbent of the specific position – Corporate Manager of Procurement department. Another person who receives an alert in the To-Do section is the holder of the parent position to this temporary position. In addition, the person who is the incumbent of the parent's parent position gets an email notification.

7.6.1 Alert Message

- In **Admin Center -> Manage Data**, specify the alert message by entering the alert header and text.

Manage Data

Search: Alert Message Temporary Unapproved Position ... Include Inactives: No Create New: No Selection

Alert Message: Temporary Unapproved Position End Date (POSITION_ALERT)

Name	External Code	Effective Status	Alert Header	Alert Description	Localised Header	Localised Description
Temporary Unapproved Position End Date	POSITION_ALERT	Active	Position End Date	Temp Unapproved Position End Date	Temp Unapproved Position End Date	Temporary Unapproved Position End Date for [[SUBJECT_NAME]] is less than 14 days away, please decide appropriate action.

Figure 19

7.6.2 Workflow

- In Admin Center -> Manage Organization, Pay and Job Structures, set up the workflow. In this example, the alert is sent to the Corporate Manager position and the parent position. An email notification is sent to the Parent's Parent position.

The screenshot displays the 'Manage Organisation, Pay and Job Structures' page. At the top, there's a search bar with 'Workflow' selected and a dropdown showing 'Temp Unappr Position Workflow ...'. A 'Create New' button with a dropdown 'No Selection' is also visible. The main content area is titled 'Workflow: Temp Unappr Position Workflow (WF_TEMP_UNAPPR_POS)' and includes a 'Take Action' dropdown. Below the title, there's a table of workflow details:

Workflow: Temp Unappr Position Workflow (WF_TEMP_UNAPPR_POS)							
Workflow ID WF_TEMP_UNAPPR_POS							
Name Temp Unappr Position Workflow							
Description							
Remind In Days 2							
Is Delegate Supported Yes							
Alternate Workflow							
Redirect CC Users to Workflow Approval Page No							
Step 1							
Approver Type	Approver Role	Context	Edit Transaction	No Approver Behaviour	Relationship to Approver	Respect Permission	Workflow Email Configuration
Position	CORPORATE MANAGER - GROUP SOURCING AND PROCUREMENT (10000402)		Edit with Route Change	Skip this Step		No	
Step 2							
Approver Type	Approver Role	Context	Edit Transaction	No Approver Behaviour	Relationship to Approver	Respect Permission	Workflow Email Configuration
Position Relationship	Parent Position	Source	Edit with Route Change	Skip this Step	Employee Position	No	
Contributors							
No data for Contributors available or you do not have the necessary permission.							
Cc Role							
Cc Role Type	Cc Role	Relationship to Approver	Context	Respect Permission	Email Template Group		
Position Relationship	Parent Parent Position	Employee Position	Source	No	No Selection		

Updated by HRZAdmin1 on Monday, 18 November 2019 21:35:37 EST

Figure 20

Since the position does not have a subject user, it only has the initiator of the workflow, we could use Position, Dynamic group, and Position relationship.

- Relationship to Approver = "Employee/Employee's position"
This relationship can only support non-employee dependent types: Position and Dynamic Group.
- Relationship to Approver = "Initiator/Initiator's Position"
This relationship type is supported using these relationship types: Position, Dynamic Group, Position Relationship (use the Initiators Position to find the position relationship)

Note: for alerts, the relationship-type positions are not supported.

7.6.3 MDFAlertType

- In Admin Center -> Manage Data, create an MDFAlertType.

The screenshot displays the 'Manage Data' page. At the top, there's a search bar with 'MDFAlertType' selected and a dropdown showing 'Temp Unapproved Position (Temp...)'. A 'Create New' button with a dropdown 'No Selection' is also visible. The main content area is titled 'MDFAlertType: Temp Unapproved Position (TempUnappPos)' and includes a 'Take Action' dropdown. Below the title, there's a table of MDFAlertType details:

MDFAlertType: Temp Unapproved Position (TempUnappPos)	
* externalCode	TempUnappPos
externalName	Temp Unapproved Position

Updated by HRZAdmin1 on Tuesday, 6 November 2018 20:32:29 EST

Figure 21

7.6.4 Business Rule

- **Go to Configure Business Rules**, and assign the workflow and message to the business rule. In this scenario, the manager and HR Administrators are given an alert 14 days before the temporary unapproved position date ends. The IF condition checks that the rule is only executed if the position is active, temporary, and unapproved. It avoids creating an alert for a historical record by checking that the end date is in the future and not in the past (but it does not check if the end date is at least 14 days away).

Tips for MDF Alert Business rule:

- Choose Rules for MDF Based Objects to create the business rule

Metadata Framework

Rules for MDF Based Objects

You can use this scenario to design rules that can be assigned to MDF objects and their fields.

- Select the object as the base object (e.g., Position)
- Do not add alert as a parameter
- Use **Execute Trigger MDF Alert Event** in the THEN statement
- Create a unique MDFAlertType for the alert
- If the MDF object has parent/child association, the business rule is built on the parent object as the base object, and the rule is triggered on the parent object.

Temporary Unapproved Position Alert (TEMP_UNAPPR_POS_ALERT)

Basic Information		Parameters	
Start Date	01/01/1900	Name	Object
Rule Type	Position Management (positionManagement)	Context	System Context
Description	Temporary unapproved position expected end date is 14 days away.	Position	Position

Variables

If

and

- Position.Status is equal to Active
- Position.Expected Position End Date is not equal to Null
- Position.Approved/Unapproved is equal to Unapproved (UNAPP)
- Position.Permanent/Temporary is equal to Temporary (T)

or

- and
 - Position.Start Date is before Today()
 - Position.Expected Position End Date is on or after Today()
- Position.Start Date is after Today()

Then

Execute Trigger MDF Alert Event()

Workflow Information: Temp Unappr Position Workflow(WF_TEMP_UNAPPR_POS)

Alert Due Date: Date Plus()

Base Date: Position.Expected Position End Date

Number of Months: 0

Number of Days: -14

Alert Message: Temporary Unapproved Position End Date (POSITION_ALERT)

Generic Object: Position

MDF Alert Type: Temp Unapproved Position (TempUnappPos)

(Optional)

Figure 22

7.6.5 Trigger

- In **Configure Object Definition -> Position**, add the Business Rule created in the previous step under the Post Save Rules.

Rules

Initialise Rules

Q No Selection +

Validate Rules

Q No Selection +

Save Rules

Q No Selection +

Post Save Rules

Q Temporary Unapproved Position ... + [icon] [trash icon]

Q No Selection +

Delete Rules

Q No Selection +

Figure 23

If the alert triggers "Today" - The Alert will be triggered when a user edits/creates an MDF Object, so the 'Initiator' is the user who makes the MDF Change.

If the alert triggers on a 'Future Date' - The Alert will be triggered via the scheduled Job. The 'Initiator' is the 'Scheduled Job Owner'.

7.7 Scenario 4 – Multiple Alerts for Driver's Permit Expired in Three Months and 1 Month

Two alerts are triggered in this example. An alert and email are sent to the employee when his/her driver's permit will be due in three months. The second alert and email are sent when the permit expires in a month.

7.7.1 Alert Message

- In Admin Center -> Manage Data, specify an alert message for 1 month and another message for 3 months alert.

Alert Message: Driver's Permit 3 Months Alert (DRIVERS_PERMIT_3MTH) [Take Action]

Name	Driver's Permit 3 Months Alert
External Code *	DRIVERS_PERMIT_3MTH
Effective Status *	Active
Alert Header	Driver's Permit Expiry Date
Alert Description	Driver's Permit Expiry Date
Localized Header *	Driver's Permit Expiry Date ? ?
Localized Description *	Driver's Permit Expiry Date for [[SUBJECT_USER]] is 3 months away, please decide appropriate action. ? ?

Figure 24

7.7.2 Workflow

- In Manage Organization, Pay and Job Structures, create a workflow for the employee.

Workflow: Work_Permit_Alert (Work_Permit_Alert) Take Action

Workflow ID: Work_Permit_Alert

Name: Work_Permit_Alert

Description:

Remind In Days:

Is Delegate Supported: No

Alternate Workflow:

Redirect CC Users To Workflow Approval Page: No

Step 1

Approver Type	Approver Role	Context	Edit Transaction	No Approver Behavior	Relationship to Approver	Respect Permission	Workflow Email Configuration
Role	Manager	Target	No Edit	Skip this Step	Employee	No	

Contributors

No data for Contributors available or you do not have the necessary permission.

Cc Role

CC Role Type	CC Role	Relationship to Approver	Context	Respect Permission	Email Template Group
Dynamic Role	Human Resources (TAG_HR)		Source	No	No Selection

Figure 25

7.7.3 Business Rule

- **Go to Configure Business Rules**, and create two business rules: one rule to trigger an alert 3 months before the driver's permit expires and another rule to trigger the 1-month alert. Multiple rules are required since only one alert can be set in each rule.
- In this scenario, the employee is given an alert 3 months before the driver's permit expires. The IF condition checks that the rule is only triggered if the document type is Driver's Permit, and the expiration date is 3 three months in the future. The alert is not created if the work permit was issued before today and the expiration date is less than three months away from today.

Driver's Permit 3 Months Alert (DRIVERS_PERMIT_3MTH)

Scenario: Basic [Change Scenario](#)

Basic Information

Start Date: 01/01/1900

Rule Type: Personal Information (PERSONALINFO)

Description: Alert when driver's permit expiration date is 3 months away.

Parameters

Name	Object
Context	System Context
Work Permit Info	Work Permit Info
Alert	Alert

Variables

If

and

- Work Permit Info.Expiration Date is not equal to Null
- Work Permit Info.Document Type is equal to Driver's Licence (7433)

or

- and
 - Work Permit Info.Issue Date is before Today()
 - Work Permit Info.Expiration Date is on or after Date Plus()

Base Date: Today()

(Optional) Number of Months: 3

(Optional) Number of Days: Null
- Work Permit Info.Issue Date is after Today()

Then

- Set Alert.Workflow Information to be equal to Work_Permit_Alert(Work_Permit_Alert)
- Set Alert.Alert Message to be equal to DRIVERS_PERMIT_3MTH
- Set Alert.Delete Old Pending Alert Flag to be equal to Yes
- Set Alert.Effective Date to be equal to Date Plus()

Base Date: Work Permit Info.Expiration Date

(Optional) Number of Months: -3

(Optional) Number of Days: 0

Figure 26

- Configure business rules to trigger an alert 1 month before the driver's permit expires. The IF condition checks that the rule is only triggered if the document type is Driver's Permit, and the expiration date is at least 1 month in the future. If the expiration date is less than 1 month from today, the alert is not created.

Driver's Permit 1 Month Alert (DRIVERS_PERMIT_1MTH)

Scenario: Basic
[Change Scenario](#)

Basic Information

Start Date

01/01/1900

Rule Type

Personal Information (PERSONALINFO)

Description

Alert when driver's permit expiration date is 1 month away.

Parameters

Name	Object
Context	System Context
Work Permit Info	Work Permit Info
Alert	Alert

Variables

If

Work Permit Info.Expiration Date is not equal to Null

Work Permit Info.Document Type is equal to Driver's Licence (7433)

and

Work Permit Info.Issue Date is before Today()

Work Permit Info.Expiration Date is on or after Date Plus()

Base Date: Today()

(Optional) Number of Months: 1

(Optional) Number of Days: Null

or

Work Permit Info.Issue Date is after Today()

Then

Set Alert.Workflow Information to be equal to Work_Permit_Alert(Work_Permit_Alert)

Set Alert.Alert Message to be equal to Driver's Permit 1 Month Alert (DRIVERS_PERMIT_1MTH)

Set Alert.Delete Old Pending Alert Flag to be equal to Yes

Set Alert.Effective Date to be equal to Date Plus()

Base Date: Work Permit Info.Expiration Date

(Optional) Number of Months: -1

(Optional) Number of Days: 0

Figure 27

7.7.4 Trigger

- In **Manage Business Configuration** under Trigger Rules section, add the two business rules created in the previous step to HRIS-Element Work Permit Information (workPermitInfo) as Event Type saveAlert. Two alerts and two email notifications are created. One is sent when the driver's permit is three months away from the expiry date, and the other is sent when the permit is one month away.

28

Employee Central > HRIS Elements > workPermitInfo

Identifier * workPermitInfo

Label Work Permit Info ⓘ

Default Label Work Permit Info

Enabled Yes ▾

HRIS Fields

* Identifier	Label	Enabled	Mandatory	(19) More	Actions
country ▾	Country ⓘ	Yes ▾	No ▾	Details	🗑️ ⬇️ ⬆️
document-type ▾	Document Type ⓘ	Yes ▾	No ▾	Details	🗑️ ⬇️ ⬆️ ⬆️
document-title ▾	Document Title ⓘ	Yes ▾	No ▾	Details	🗑️ ⬇️ ⬆️ ⬆️
document-number ▾	Document Number ⓘ	Yes ▾	Yes ▾	Details	🗑️ ⬇️ ⬆️ ⬆️
issue-date ▾	Issue Date ⓘ	Yes ▾	Yes ▾	Details Tr	🗑️ ⬇️ ⬆️ ⬆️
issue-place ▾	Issue Place ⓘ	Yes ▾	No ▾	Details	🗑️ ⬇️ ⬆️ ⬆️
issuing-authority ▾	Issuing Authority ⓘ	Yes ▾	No ▾	Details	🗑️ ⬇️ ⬆️ ⬆️
expiration-date ▾	Expiration Date ⓘ	Yes ▾	Yes ▾	Details	🗑️ ⬇️ ⬆️ ⬆️
is-validated ▾	Validated ⓘ	Yes ▾	No ▾	Details	🗑️ ⬇️ ⬆️ ⬆️
attachment-id ▾	Attachment ⓘ	Yes ▾	No ▾	Details	🗑️ ⬆️ ⬆️
No Selection ▾	Click or focus to edit ⓘ	No ▾	No ▾	Details	

Trigger Rules

Base Object	* Event Type	* Rules	Enabled	(1) More	Actions
Work Permit Info ▾	saveAlert ▾	🔍 Driver's Permit 3 Months Alert... 📄	Yes ▾	Details	🗑️ ⬇️
Work Permit Info ▾	saveAlert ▾	🔍 Driver's Permit 1 Month Alert ... 📄	Yes ▾	Details	🗑️ ⬆️

Figure 28

7.8 Scenario 5 – Alert Manager for Return from Leave in Two Days

This example shows the alert that is created for a manager when the direct report is about to return to work from a paid leave in two days.

7.8.1 Alert Message

- In Admin Center -> Manage Data, specify an alert message for return from leave.

Manage Data

Search Include Inactives: Create New

Alert Message: Alert Reminder Return from Leave (ALERT_RETURNLV) Take Action ▼

Name Alert Reminder Return from Leave

* External Code ALERT_RETURNLV

* Effective Status Active

Alert Header [[SUBJECT]USER]] is returning from leave

Alert Description [[SUBJECT]USER]] is returning from [[TIME_OFF_TYPE]] on [[END_DATE]]

* Localised Header [[SUBJECT]USER]] is returning from leave ? ?

* Localised Description [[SUBJECT]USER]] is returning from [[TIME_OFF_TYPE]] on [[END_DATE]] ? ?

Updated by ISAdmin on Sunday, 18 August 2019 16:02:50 AST

Figure 29

7.8.2 Workflow

- In Manage Organization, Pay and Job Structures, create a workflow for the manager.

Manage Organisation, Pay and Job Structures

Search : Advanced Create New :

Workflow: Return from Leave (RETURNLV) Take Action ▼

Workflow ID RETURNLV

Name Return from Leave ?

Description 2 days reminder before return from leave ?

Remind In Days

Is Delegate Supported No

Escalation

Alternate Workflow

Redirect CC Users to Workflow Approval Page No

Step 1

Approver Type	Approver Role ?	Context ?	Edit Transaction ?	No Approver Behaviour	Relationship to Approver	Respect Permission	Workflow Email Configuration
Role	Manager	Source	No Edit	Skip this Step	Employee	No	

Contributors

No data for Contributors available or you do not have the necessary permission.

Cc Role

No data for Cc Role available or you do not have the necessary permission.

Updated by ISAdmin on Sunday, 18 August 2019 15:54:55 AST

Figure 30

7.8.3 Business Rule

- Go to Configure Business Rules**, and create a business rule to trigger an alert days before the employee returns from leave of absence. The rule is triggered only for a specific time type PLALV (paid leave) two days before the end date of the leave.

Figure 31

7.8.4 Trigger

In **Configure Object Definition -> Employee Time**, add the Business Rule created in the previous step under the Post Save Rules. The manager receives an alert 2 days before the employee returns.

Figure 32

7.9 Scenario 6 – Alerts Administrators for 25 Days into a 12-Month Leave Period

When an employee takes a long-term (12 months) leave and has passed 25 days of absence, an alert is created in the To-Do section for the dynamic group HR_ADMIN_WFGROUP and dynamic group HR_MGMT_WFGROUP.

7.9.1 Alert Message

- In **Admin Center -> Manage Data**, specify an alert message for 25 days.

Manage Data

Search Include Inactives: Create New

Alert Message: ALERT_25_SICKDAYS (ALERT_25_SICKDAYS) Take Action

Name ALERT_25_SICKDAYS

* External Code ALERT_25_SICKDAYS

* Effective Status Active

Alert Header Employee has gone into 25 days of Sick Leave

Alert Description This is an alert that employee has gone into 25 days of sick leave.

* Localised Header Employee has gone into 25 days of Sick Leave ? ?

* Localised Description This is an alert that employee has gone into 25 days of sick leave. ? ?

Updated by ISAdmin on Sunday, 18 August 2019 16:25:33 AST

Figure 33

7.9.2 Workflow

- In **Manage Organization, Pay and Job Structures**, create a workflow for dynamic groups HR_ADMIN_WFGROUP and SENIOR_HR_MGMT_WFGROUP.

Manage Organisation, Pay and Job Structures

Search: Advanced Create New:

Workflow: Reminder of a long sick leave (LONG_SICK_LEAVE) Take Action

Workflow ID LONG_SICK_LEAVE

Name Reminder of a long sick leave ?

Description

Remind In Days

Is Delegate Supported No

Escalation

Alternate Workflow

Redirect CC Users to Workflow Approval Page No

Step 1

Approver Type	Approver Role ?	Context ?	Edit Transaction ?	No Approver Behaviour	Relationship to Approver	Respect Permission	Workflow Email Configuration
Dynamic Group	HR_ADMIN_WFGROUP		No Edit	Skip this Step		Yes	

Step 2

Approver Type	Approver Role ?	Context ?	Edit Transaction ?	No Approver Behaviour	Relationship to Approver	Respect Permission	Workflow Email Configuration
Dynamic Group	SENIOR_HR_MGMT_WFGROUP		No Edit	Skip this Step		Yes	

Contributors

No data for Contributors available or you do not have the necessary permission.

Cc Role

No data for Cc Role available or you do not have the necessary permission.

Updated by ISAdmin on Sunday, 18 August 2019 16:20:37 AST

Figure 34

7.9.3 Business Rule

- Go to **Configure Business Rules**, and create a business rule to trigger an alert when the leave has reached 25 days. The rule is triggered only for specific types of leave - Uncertified Sick Leave for Permanent employees, Certified Sick Leave for Permanent or Temporary employees. It also verified that it is for a leave request of more than 12 months.

Configure Business Rules

Search :Rule Advanced

History

01/01/1900 Take Action
Rule created

Alert 25 Sick Days in 12 months leave (Alert_25_SickDays)

Basic Information

Start Date: 01/01/1900
Rule Type: Time Off (TIMEOFF)
Description:

Parameters

Name	Object
Context	System Context
Employee Time	Employee Time

Variables

If

and

or

- Employee Time.Time Type is equal to Uncertified Sick Leave - Permanent (PLAUSLP)
- Employee Time.Time Type is equal to Certified Sick Leave - Permanent (PLACSLP)
- Employee Time.Time Type is equal to Certified Sick Leave - Temporary (PLACSLC)

Get Number Of Months From Start Date Until End Date() > 12
Start Date: Employee Time.Start Date
End Date: Employee Time.End Date

Then

Execute: Trigger Employee Time Alert Event()
Workflow Information: Reminder of a long sick leave(LONG_SICK_LEAVE)
Effective Date: Date Plus()
Base Date: Employee Time.Start Date
Number of Months: 0
Number of Days: 25
Alert Message: ALERT_25_SICKDAYS (ALERT_25_SICKDAYS)
External Code: Employee Time.External Code

Figure 35

7.9.4 Trigger

- In **Configure Object Definition -> Employee Time**, add the Business Rule created in the previous step under the Post Save Rules. The HR Administrators and Senior HR Management group will receive an alert once the leave has passed 25 days.

Rules

Initialise Rules

+

Validate Rules

+

Save Rules

+

Post Save Rules

+

Figure 36

7.10 Scenario 7 – Alert for Work Order End Date in 90 days (Off-Cycle Event Batch and Intelligent Service)

When the intelligent service is turned on to trigger the work order expiry date, by default, the alert or notification is designed to send to the contingent worker/supervisor/work order owner and supervisor. It does not allow you to configure the role/person to receive the alert or notification. It uses a standard notification message as well. In this scenario, an alert is sent when the work order expires in 90 days.

7.10.1 Business Rule

- Build business rules to trigger an alert when the work order is going to be expired.

Back to Business Rules Admin

Configure Business Rules

Search :Rule No Selection Advanced

History «

01/01/1900 Take Action

Rule created

Work Order End Date (Work_Order_End_Date)

Scenario: Rules for MDF Based Objects

Basic Information

Start Date: 01/01/1900

Description: Rules for MDF Based Objects

Base Object: Work Order

Purpose: Alert

Parameters

Name	Object
Context	System Context
Work Order	Work Order
Original Record	Work Order

Show More

Variables

If

This rule is always true. To add an expression please untick the Always True tick box.

Then

Execute Trigger Work Order Expiry Event()

Work Order: Work Order

Figure 37

7.10.2 Trigger

- Configure the trigger in the Work Order object. In **Manage Data** -> **Create** an Off-Cycle Event Batch for the work order.

Manage Data

Search Off Cycle Event Batch Work Order End Date (WO_Expiry) Include Inactives: No Create New No Selection

Off Cycle Event Batch: Work Order End Date (Work_Order_End_Date) (WO_Expiry) Take Action

* Code: WO_Expiry

* Associated Rule: Work Order End Date (Work_Order_End_Date)

* Base Object: Work Order

Include All Matched Records In Every Run: No

* Status: Active

Frequency: Daily

toFilter

Filter Field	Operator	Offset	Offset Unit
End Date	is on or before	-90	Day(s)

(1) More

Details

Figure 38

7.10.3 Schedule Job in Provisioning

- In Provisioning, schedule the Job BizX Daily Rules Processing Batch to monitor the batches.

Scheduled Jobs

Create New Job Monitor Jobs

Job Type: BizX Daily Rules Processing Batch

Job Name: bizXDaily

Job Name	Job Type	Recurring?
bizXDailyRulesProcessingBatchJobType(72923)	BizX Daily Rules Processing Batch	<input checked="" type="checkbox"/>

Result:

The owner of the work order receives a notification under the bell notification icon.

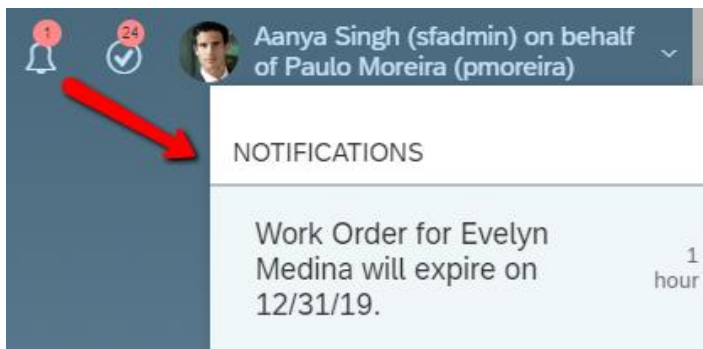


Figure 39

7.11 Scenario 8 – Alert to Check on Employee One Month and One Week After Hiring/Rehiring

In this example, an alert is triggered post-hire/rehire of an employee. In the below example, it is 1 month + 7 days. The manager and the Benefit Team are alerted to follow up with the employee. Alert is created in the To-Do section, as well an email notification is sent.

7.11.1 Alert Message

- In Admin Center -> Manage Data, specify the alert message by entering the alert header and text.

Figure 40

7.11.2 Workflow

- In "Manage Organization, Pay and Job Structures" transaction, set up the workflow. In this example, the alert is sent to the manager and Benefit Team. They are specified in Step 1 and Step 2as recipients of alerts. To send an email to both parties, they are also defined in the CC Role section. As a result, the manager and all users in the Benefit Team get an alert in the Take Action tile, as well as an email notification.

Manage Organization, Pay and Job Structures

Search :
Workflow

Hire Follow Up Workflow (HIRE_...
Advanced

Create New :
No Selection

Workflow: Hire Follow Up Workflow (HIRE_FOLLOW_UP_WF)
Take Action

Workflow ID
HIRE_FOLLOW_UP_WF

Name
Hire Follow Up Workflow

Description

Remind In Days

Is Delegate Supported
No

Alternate Workflow

Redirect CC Users to Workflow Approval Page
No

Step 1

Approver Type	Approver Role	Context	Edit Transaction	No Approver Behavior	Relationship to Approver	Respect Permission	Workflow Email Configuration
Role	Manager	Source	No Edit	Stop the Workflow	Employee	No	

Step 2

Approver Type	Approver Role	Context	Edit Transaction	No Approver Behavior	Relationship to Approver	Respect Permission	Workflow Email Configuration
Dynamic Group	Benefits Team		No Edit	Stop the Workflow		No	

Contributors

No data for Contributors available or you do not have the necessary permission.

Cc Role

Cc Role Type	CC Role	Relationship to Approver	Context	Respect Permission	Email Template Group
Role	Manager	Employee	Source	No	No Selection
Dynamic Group	Benefits Team			No	No Selection

Figure 41

7.11.3 Business Rule

- Go to Configure Business Rules**, and assign the workflow and message to the business rule. The condition in this scenario is to create an alert one month and 1 week following the hire/rehire date. The alert is created only for active employees, and the target date is after today. It checks for future records (hire/rehire date after today) or current records where the hire/rehire effective start date was in the past, and the target date has not passed, and it fulfills the criteria to trigger the alert. The alert is triggered when it is 1 month and 1 week has passed after the hire/rehire date.

✓ **EC Hire Follow Up (EC_HIRE_FOLLOWUP)**

Scenario: Generate Alerts [Change Scenario](#)

Basic Information

Start Date 01/01/1900

Description Check up on employee 1 month and 1 week after Hire/Rehire date.

Base Object Employment Details

Parameters

Name	Object
Context	System Context
Employment Details	Employment Details
Alert	Alert

Variables

If

and

- or
 - Employment Details.Hire/Rehire Date is on or after Today()
 - and
 - Employment Details.Hire/Rehire Date is before Today()
 - Date Plus()
 - Base Date: Employment Details.Hire/Rehire Date
 - (Optional) Number of Months: 1
 - (Optional) Number of Days: 7
- or
 - Employment Details.Job Information.Employee Status is equal to Active (36970)
 - Employment Details.Job Information.Employee Status is equal to Paid Leave (36974)
 - Employment Details.Job Information.Employee Status is equal to Unpaid Leave (36978)

Then

Set Alert.Workflow Information to be equal to Hire Follow Up Workflow(HIRE_FOLLOW_UP_WF)

Set Alert.Delete Old Pending Alert Flag to be equal to Yes

Set Alert.Effective Date to be equal to Date Plus()

- Base Date: Employment Details.Hire/Rehire Date
- (Optional) Number of Months: 1
- (Optional) Number of Days: 7

Set Alert.Alert Message to be equal to Hire Follow Up (HIRE_FOLLOW_UP)

Figure 42

7.11.4 Trigger

- In **Manage Business Configuration**, under **Trigger Rules** section, add the business rule created in the previous step to **HRIS-Element Employment Details (employmentInfo)** as Event Type **saveAlert**.

[Back to: Admin Center](#)

Employee Central

HRIS Elements

- compInfo
- directDeposit
- emailInfo
- emergencyContactPrimary
- employmentInfo**
- globalAssignmentInfo
- globalInfo
- homeAddress
- imInfo
- jobInfo
- jobRelationsInfo
- nationalIdCard
- payComponentNonRecurring
- payComponentRecurring
- paymentInfo
- pensionPayoutsInfo
- personalInfo
- personInfo
- personRelationshipInfo

Employee Central **HRIS Elements** **employmentInfo**

Identifier * employmentInfo

Label **Employment Details**

Default Label Employment Details

Enabled Yes

HRIS Fields

* Identifier	Label	Enabled	Mandatory	(20) More	Actions
jobNumber	Employment Id	No	No	Details	⌵ ⌶ ⌴
start-date	Hire/Rehire Date	Yes	Yes	Details	⌵ ⌶ ⌴ ⬆

Trigger Rules

Enabled	Base Object	* Event Type	* Rules	(1) More Actions
Yes	Employment Details	saveAlert	EC Hire Follow Up (EC_HIRE_FOL...	Details [trash] [down arrow]

Figure 43

7.12 Scenario 9 - Temporary worker is converted to a permanent Employee

A temporary employee is hired, which means the contract date is specified(not empty) and later (let's say after six months but before the Alert due date, the employee is converted into a regular employee (then the contract date is set to null in Job info).

Alert to be sent one month before the Contract End date

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15- Sep-2021	New hire	15-Sep-2022

After the alerts job runs, the records in the Alert object would be like this (assume that the Job runs on 16-Sep-2021):

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2021	ContractRuleEnd	15-Aug-2022

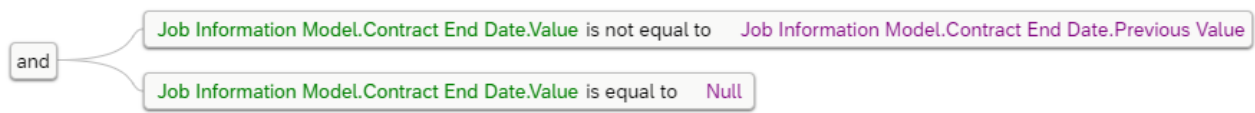
Let us say on 1st Jan 2022, there is a new record added to Job info, where the employee becomes a permanent employee (Employment type is also changed)

User ID	Name	Event Date	Event Reason	Contract End Date
88178	Geoff Hill	15- Sep-2021	New hire	15-Sep-2022
88178	Geoff Hill	01- Jan-2022	Convert to Permanent Employee	

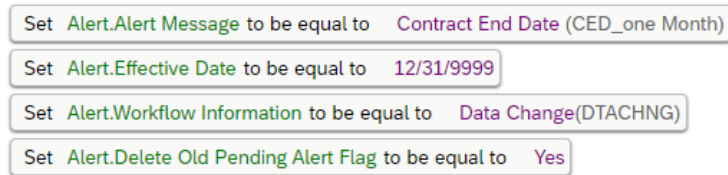
In this case when the below rule is executed it evaluates the if condition as false. Therefore, the old alert is not deleted.



In such a situation, you can add another condition like the one below. Set the alert effective date as 31-Dec-9999.



Then



The "else if - then" ensures the old pending alert is deleted. However, a new entry in the alert object would be created as below.

Entity Type	Name	Entity Effective Date	Alert Rule Name	Alert Effective Date
Job Info	Geoff Hill	15-Sep-2021	ContractRuleEnd	15-Aug-2022 -> Deleted
		1-Jan-2022	ContractRuleEnd	31-Dec-9999

The alert created for 31-Dec-9999 is also not required and can be manually deleted from the transaction "Manage Alerts and Notification" using the filter on "Alert Effective date."

7.13 Recommended Solution

7.13.1 Multiple countries with different document types and alert days

In the scenario where multiple countries have different time-based alerts, a recommended option is to use a lookup table. For example, the USA requires an alert 3 days before the work permit expires, Australia requires 1 day, and Singapore requires 20 days before the expiry date. The lookup table keeps the business rule simple and easy to maintain. Instead of having multiple IF/THEN conditions for different countries, only one IF/THEN condition is needed for all countries.

7.13.1.1 Create a custom MDF object as the lookup table

- In **Configure Object Definitions -> Create New**, add a table. In this example, it is called Lookup Work Permit by Country. The table includes the country, the document type, and the number of days to create the alert.

Configure Object Definitions

Search
Object Definition

Lookup Work Permit by Country

Include Inactives:
No

Create New
No Sele

Object Definition: Lookup Work Permit by Country (cust_WorkPermit_byCountry)

Code
cust_WorkPermit_byCountry

Effective Dating
None

API Visibility
Not Visible

Status
Active

MDF Version History
No Selection

Default Screen

Label
Lookup Work Permit by Country

Description

API Sub Version
V1.1

Subject User Field

Workflow Routing

Pending Data
No

Todo Category
Generic Object Change Requests

Fields

Name	Database Field Name	Maximum Length	Data Type	(21) More
Code	externalCode	128	String	Details
Name	externalName	128	String	Details
cust_Country	sfFields.sfField1	38	Picklist	Details
cust_docType	sfFields.sfField3	38	Picklist	Details
cust_numDays	sfFields.sfField2	128	Number	Details
cust_numMonths	sfFields.sfField4	38	Number	Details
cust_alertMsg	sfFields.sfField5	38	Generic Object	Details
mdfSystemEffectiveStartDate	effectiveStartDate	10	Date	Details
mdfSystemEffectiveEndDate	effectiveEndDate	10	Date	Details
mdfSystemTransactionSequence	transactionSequence	255	Number	Details
mdfSystemInternalCode	internalCode	255	Number	Details

Figure 40

- Details of Cust Country field:

Details

Name
cust_Country

Database Field Name
sfFields.sfField1

Maximum Length
38

Data Type
Picklist

Valid Values Source
ISOCountryList

Hide Old Value
No

Decimal Precision

Include Inactive Users
No

UI Field Renderer

Transient
No

Help Text

Private or Sensitive Information
No

Show Trailing Zeros
No

Default Value

Hide Seconds
No

Required
No

Visibility
Editable

Status
Active

Label
Country

Cascade
None

Inactivated By
No Selection

End Of Period
No

Rules

External Code

Field Criteria

Source Field Name	Destination Field Name	Default Destination Value	Status
-------------------	------------------------	---------------------------	--------

Finished

Figure 41

- Details of cust_docType field:

Details

Name

cust_docType

Database Field Name

sfFields.sfField3

Maximum Length

38

Data Type

Picklist

Valid Values Source

permittedoctype

Hide Old Value

No

Decimal Precision

Include Inactive Users

No

UI Field Renderer

Transient

No

Help Text

Private or Sensitive Information

No

Show Trailing Zeros

No

Default Value

Hide Seconds

No

Required

No

Visibility

Editable

Status

Active

Label

Document Type ⓘ

Cascade

None

Inactivated By

No Selection

End Of Period

No

Rules

External Code

Field Criteria

Source Field Name

Destination Field Name

Default Destination Value

Status

Finished

Figure 46

- Details of cust_numDays field:

Details

Name

cust_numDays

Database Field Name

sfFields.sfField2

Maximum Length

128

Data Type

Number

Valid Values Source

Hide Old Value

No

Decimal Precision

Include Inactive Users

No

UI Field Renderer

Transient

No

Help Text

Private or Sensitive Information

No

Show Trailing Zeros

No

Default Value

Hide Seconds

No

Required

No

Visibility

Editable

Status

Active

Label

No. of Days ⓘ

Cascade

None

Inactivated By

No Selection

End Of Period

No

Rules

External Code

Field Criteria

Source Field Name

Destination Field Name

Default Destination Value

Status

Finished

Figure 47

- Details of cust_numMonths field:

Details

Name

cust_numMonths

Database Field Name

sfFields.sfField4

Maximum Length

38

Data Type

Number

Valid Values Source

Hide Old Value

No

Decimal Precision

Include Inactive Users

No

UI Field Renderer

Transient

No

Help Text

Private or Sensitive Information

No

Show Trailing Zeros

No

Default Value

Hide Seconds

No

Required

No

Visibility

Editable

Status

Active

Label

No. of Months ⓘ

Cascade

None

Inactivated By

No Selection

End Of Period

No

Rules

External Code

Field Criteria

Source Field Name

Destination Field Name

Default Destination Value

Status

Finished

Figure 48

- Details of cust_alertMsg field:

Details

Name

cust_alertMsg

Database Field Name

sfFields.sfField5

Maximum Length

38

Data Type

Generic Object

Valid Values Source

AlertMessage

Hide Old Value

No

Decimal Precision

Include Inactive Users

No

UI Field Renderer

Transient

No

Help Text

Private or Sensitive Information

No

Show Trailing Zeros

No

Default Value

Hide Seconds

No

Required

No

Visibility

Editable

Status

Active

Label

Alert Message ⓘ

Cascade

None

Inactivated By

No Selection

End Of Period

No

Rules

External Code

Field Criteria

Source Field Name

Destination Field Name

Default Destination Value

Status

Finished

Figure 49

- Picklist for permitdoctype:

Admin Centre / Picklist Centre / Versions /

permitdoctype
Effective 31 Dec 1899

Edit Delete

Name: Code: permitdoctype
Parent Picklist: [ISOCountryList \(ISOCountryList\)](#)
Display Order:

Status: Active
Effective Start Date: 1 Jan 1900
Legacy Picklist ID: permitdoctype

Picklist Values (3)

Search [] Delete + ↕ [] [] []

<input type="checkbox"/> External Code	Label	Status	Parent Picklist Value
<input type="checkbox"/> AUS-02	AUS - Work Permit	Active	Australia (AUS) >
<input type="checkbox"/> F1	SGP-Work Permit	Active	Singapore (SGP) >
<input type="checkbox"/> N2	Work Permit	Active	United States (USA) >
<input type="checkbox"/> A2	SGP-Driver's Licence	Active	Singapore (SGP) >
<input type="checkbox"/> PHL-05	PHL - Driver's Licence	Active	Philippines (PHL) >

Figure 50

- Once the table definition is created, add the values to the lookup table for each country. In **Manage Data** -> **Lookup Work Permit by Country**, add the value for the USA work permit.
 - Australia Work Permit:

Manage Data

Search [] [] [] Include Inactives: No

Lookup Work Permit by Country: AUS_WorkPermit (003)

* Code 003
Name AUS_WorkPermit
Country Australia (AUS)
Document Type AUS - Work Permit (AUS-02)
No. of Days 1
No. of Months 0
Alert Message Work Permit Alert 1 Day (Work_Permit_Alert_1d) []

Figure 51

- Philippines Driver's License:

Manage Data

Search Include Inactives:

Lookup Work Permit by Country: PHL_DL (0005)

* Code 0005
 Name PHL_DL
 Country Philippines (PHL)
 Document Type PHL - Driver's Licence (PHL-05)
 No. of Days 0
 No. of Months 1
 Alert Message Work Permit Alert 1 Month (Work_Permit_Alert_1m) [🔍]

Figure 52

- Singapore Driver's License:

Manage Data

Search Include Inactives:

Lookup Work Permit by Country: SGP_DL (0004)

* Code 0004
 Name SGP_DL
 Country Singapore (SGP)
 Document Type SGP-Driver's Licence (A2)
 No. of Days 0
 No. of Months 2
 Alert Message Work Permit Alert 2 Months (Work_Permit_Alert_2m) [🔍]

Figure 53

- Singapore Work Permit:

Manage Data

Search Include Inactives:

Lookup Work Permit by Country: SGP_WorkPermit (002)

* Code 002
 Name SGP_WorkPermit
 Country Singapore (SGP)
 Document Type SGP-Work Permit (F1)
 No. of Days 20
 No. of Months 0
 Alert Message Work Permit Alert 20 Days (Work_Permit_Alert_20d) [🔍]

Figure 54

- USA Work Permit:

Manage Data

Search Include Inactives:

Lookup Work Permit by Country: USA_WorkPermit (001)

* Code	001
Name	USA_WorkPermit
Country	United States (USA)
Document Type	Work Permit (N2)
No. of Days	3
No. of Months	0
Alert Message	Work Permit Alert 3 Days (Work_Permit_Alert_3d) <input type="text"/>

Figure 42

- Build a business rule to determine the document type and alert day from the lookup table.
In **Configure Business Rules -> Create New Rule**, build the rule "Work Permit Alert by Country".

Work Permit Alert by Country (Work_Permit_Alert_by_Country)

Basic Information

Start Date: 03/01/1900
Rule Type: Employee Updates (EmployeeUpdates)
Description:

Parameters

Name	Object
Context	System Context
Visa and Work Permits	Visa and Work Permits
Alert	Alert

Variables

If

Visa and Work Permits.Expiry Date is not equal to Null

Visa and Work Permits.Biographical Information.Employment Details.Job Information.Employee Status is equal to Active (4595)
Select Visa and Work Permits.Biographical Information.Employment Details where...

and

Visa and Work Permits.Document Type is equal to Lookup(Lookup Work Permit by Country)
Select Document Type
where...
Lookup Work Permit by Country. Document Type is equal to Visa and Work Permits.Document Type
Lookup Work Permit by Country. Country is equal to Visa and Work Permits.Country

Visa and Work Permits.Expiry Date is on or after Date Plus()
Base Date: Today()
Number of Months: Lookup(Lookup Work Permit by Country)
Select No. of Months
where...
Lookup Work Permit by Country. Country is equal to Visa and Work Permits.Country
Lookup Work Permit by Country. Document Type is equal to Visa and Work Permits.Document Type
Number of Days: Lookup(Lookup Work Permit by Country)
Select No. of Days
where...
Lookup Work Permit by Country. Country is equal to Visa and Work Permits.Country
Lookup Work Permit by Country. Document Type is equal to Visa and Work Permits.Document Type

Then

Set Alert.Workflow Information to be equal to Manager(Manager)

Set Alert.Effective Date to be equal to Date Plus()
Base Date: Visa and Work Permits.Expiry Date
Number of Months: Multiply()
Value: Lookup(Lookup Work Permit by Country)
Select No. of Months
where...
Lookup Work Permit by Country. Country is equal to Visa and Work Permits.Country
Lookup Work Permit by Country. Document Type is equal to Visa and Work Permits.Document Type
Number of Days: Factor: -1
Multiply()
Value: Lookup(Lookup Work Permit by Country)
Select No. of Days
where...
Lookup Work Permit by Country. Country is equal to Visa and Work Permits.Country
Lookup Work Permit by Country. Document Type is equal to Visa and Work Permits.Document Type
Factor: -1

Set Alert.Alert Message to be equal to Lookup(Lookup Work Permit by Country)
Select Alert Message
where...
Lookup Work Permit by Country. Country is equal to Visa and Work Permits.Country
Lookup Work Permit by Country. Document Type is equal to Visa and Work Permits.Document Type

Set Alert.Delete Old Pending Alert Flag to be equal to Yes

Figure 56

- Set up the trigger in **Manage Business Configuration -> workPermitInfo -> Trigger Rules** section, and add the business rule as saveAlert Event Type.

Employee Central **HRIS Elements** **workPermitInfo**

* Identifier: workPermitInfo

Label: Visa and Work Permits

Default Label: Work Permit Info

Enabled: Yes

HRIS Fields

* Identifier	Label	Enabled	Mandatory	(18) More
country	Country	Yes	Yes	Details
document-type	Document Type	Yes	Yes	Details
document-title	Document Title	Yes	No	Details
document-number	Document Number	Yes	No	Details
issue-date	Issue Date	Yes	Yes	Details
issue-place	Issue Place	Yes	No	Details
issuing-authority	Issuing Authority	Yes	No	Details
expiration-date	Expiry Date	Yes	No	Details
is-validated	Validated	Yes	Yes	Details
No Selection	Click or focus to edit	No	No	Details

Trigger Rules

Base Object	* Event Type	* Rules	Enabled	(1) More
Work Permit Info	saveAlert	Work Permit Alert by Country (...)	Yes	Details


Figure 57

7.13.2 Best way to handle Global Assignment for alerts

- While an employee is an active expatriate on a global assignment, their home employment is dormant. However, alerts related to either employment will apply. One such alert is the message indicating the upcoming end date of the global assignment. An example of another alert related to home employment would be if an employee updates their home address while on the global assignment. If there is an alert configured for address changes, this will trigger.
- To be able to configure an EC Alert to notify both the Home and Host manager that the Global Assignment is ending in x number of days, this will require alert rules to be created. Using 2 Alert rules, 2 Alert Message objects and, 1 Workflow object. Both rules need to be configured on jobInfo as saveAlert.

7.13.3 How to debug an alert and test

- During testing, if the actual due date in the business rule is many days ahead, reduce it to a shorter number of days. Instead of months or weeks in the future, change it to days to trigger the alert sooner.
- Set up the test data so that an employee has an end date in the future.



Arthur Smith (asmith)
▼
Associate, Brand & Marketing


<
AL INFORMATION
EMPLOYMENT
PAYROLL INFORMATION
PAYROLL

Work Eligibility

Visa and Work Permits
✎

Country	United States
Document Type	Work Permit
Document Title	-
Document Number	-
Issue Date	01 Sep 2018
Issue Place	-
Issuing Authority	-
Expiry Date	27 Sep 2019
Validated	Yes
Attachments	-

Figure 58



Alex Chua (alexc)
▼
President SEA

<
AL INFORMATION
EMPLOYMENT
PAYROLL INFORMATION
PAYROLL


Work Eligibility

Visa and Work Permits
✎

Country	Singapore
Document Type	SGP-Work Permit
Document Title	-
Document Number	-
Issue Date	01 Sep 2018
Issue Place	Singapore
Issuing Authority	-
Expiry Date	31 Oct 2019
Validated	Yes
Attachments	-

Country	Singapore
Document Type	SGP-Driver's Licence
Document Title	-
Document Number	-
Issue Date	01 Jan 2017
Issue Place	-
Issuing Authority	-
Expiry Date	31 Dec 2019
Validated	Yes
Attachments	-

Figure 59



Michael Schmidt (mschmidt) ✓ Capacity Planning Manager


< AL INFORMATION **EMPLOYMENT** PAYROLL INFORMATION PAYROLL

Work Eligibility

Visa and Work Permits ✎

Country	Australia
Document Type	AUS - Work Permit
Document Title	-
Document Number	-
Issue Date	01 Sep 2018
Issue Place	-
Issuing Authority	Sydney
Expiry Date	14 Sep 2019
Validated	Yes
Attachments	-

Figure 60



Anthony Gonzales (agonzales) ✓ Management & Planning

< AL INFORMATION **EMPLOYMENT** PAYROLL INFORMATION PAYROLL

Work Eligibility

Visa and Work Permits ✎

Country	Philippines
Document Type	PHL - Driver's Licence
Document Title	-
Document Number	-
Issue Date	01 Sep 2018
Issue Place	-
Issuing Authority	-
Expiry Date	31 Dec 2019
Validated	Yes
Attachments	-

Figure 61

- Set up a one-time "EC Alerts & Notifications" job in Provisioning. Run this Job.
- In **Admin Center -> Manage Alerts & Notifications**, search for EC Alert on Work Permit. It lists all the alerts that have been created by the Job, indicated by the Alert Creation Date. The Alert Effective Date is when the alert will be created on the To-Do section Take Action tile, and an email notification will be sent to the employees according to the workflow.

Admin Centre / Manage Alerts And Notifications 🔍 🗑️ Delete

Pending Alerts (5) Pending To-Dos (...)

Initiated For:
 *Alert Type:
 *Entity Type:
 Alert Effective Date:
 Entity Effective Date:
 Alert Message:
 Alert Rule Name:

Alert Workflow:

Clear

<input type="checkbox"/> Entity Type	Initiated For	Entity Effective Date	Alert Message	Alert Rule Name	Alert Workflow	Alert Effective Date	Alert Creation Date	Actions
<input type="checkbox"/> Visa and Work Permits	Anthony Gonzales		Work_Permit_Alert_1m	Work_Permit_Alert_by_Count ry	Manager	30 November 2019	16 September 2019	<input type="button" value="Delete"/>
<input type="checkbox"/> Visa and Work Permits	Alex Chua		Work_Permit_Alert_2m	Work_Permit_Alert_by_Count ry	Manager	31 October 2019	16 September 2019	<input type="button" value="Delete"/>
<input type="checkbox"/> Visa and Work Permits	Alex Chua		Work_Permit_Alert_20d	Work_Permit_Alert_by_Count ry	Manager	11 October 2019	16 September 2019	<input type="button" value="Delete"/>
<input type="checkbox"/> Visa and Work Permits	Michael Schmidt		Work_Permit_Alert_1d	Work_Permit_Alert_by_Count ry	Manager	22 September 2019	16 September 2019	<input type="button" value="Delete"/>
<input type="checkbox"/> Visa and Work Permits	Arthur Smith		Work_Permit_Alert_3d	Work_Permit_Alert_by_Count ry	Manager	24 September 2019	16 September 2019	<input type="button" value="Delete"/>

Figure 62

- Change the business rule if the alert is wrong due to incorrect business rule logic. Existing alerts are sent based on business rules when the alerts were created. If the business rule is changed, existing alerts must be removed. To remove outdated alerts, click on the Delete button next to the Alert in **Admin Center -> Manage Alerts and Notifications**.
- After the business rule is modified, execute the one-time "EC Alerts and Notifications" job in Provisioning. Verify the alerts in **Admin Center -> Manage Alerts and Notifications**. As the Job checks the last modified status of the record, it is important to update the record so that the change in the data triggers the business rule. Repeat this step until the alerts are displayed with the correct Alert Effective Date.
- When the alert date arrives, go to **Homepage -> To-Do section -> Take Action** tile, and verify the alert with the appropriate message exists. In addition, an email notification is received if it is configured in the workflow.
- Note that it is not possible to test an alert that is due one day immediately after the one-time job run date. To test an alert with one day lead time, make the expiry date two days ahead of the day when the system job runs. For example, the expiry date of the work permit is due on September 14, and today is September 13. When the one-time Job runs in Provisioning on Sept.13, it does not create an alert because it does not consider today to be one full day ahead of the due date. Instead, set up the end date to be Sept.15. When the Job runs on Sept.13, it creates the alert with an Alert Effective Date of September 14, one full day before the expiry date.

7.13.4 How to make sure there are no duplicates in Alert object

- For each object with alert business rules being set up, check that the rules are not created for the same alert effective date.
- If the same alert message is sent by different business rules on the same date, only 1 To-Do item and 1 email notification are sent. If the same alert message is sent by different business rules on 2 different dates, a To-Do item and an email notification are sent on the first trigger. When the rule on the second date is triggered, the first To-Do item is deleted. A new To-Do item is created, and a new email notification is sent.
- Use a standardized naming convention for alert messages and workflows. If the same message or workflow is created, this identifies the possibility of duplicated alerts that should be deleted.

- Use a lookup table when there are multiple alerts on the same alert objects. Each row in the table contains unique alert information. This helps to prevent creating duplicate alerts.

7.13.5 How to avoid inactive employees

- To avoid creating alerts for inactive employees, set the IF condition in the business rule to check for active employee status from the Job Information object. Only include an employee with employee status Active/Suspended/Dormant/Paid Leave/Unpaid Leave.



Figure 63

- If inactive employees are not excluded from the business rule, alerts are created for terminated employees. However, these alerts will not be sent to terminated accounts.

7.13.6 How to avoid alerts created for historical records

- As the EC Alerts and Notification job in Provisioning consider all records based on the last modified dates during the rule evaluation, the IF condition can be used to only include future and current records. This can be accomplished by using the event start date and end date of the triggering field.

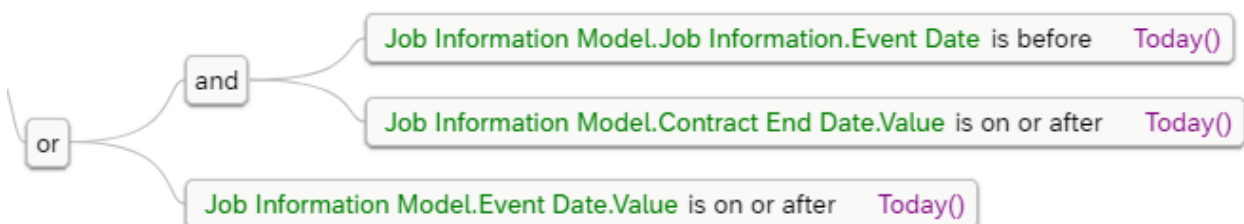
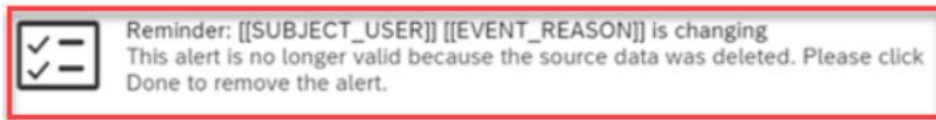


Figure 64

7.13.7 Orphaned alerts

- Alerts can become orphaned due to the following possibilities:
 - Data that triggers the alert has been removed
 - Tokens or tags in the alert message are incorrect

- An alert message has been removed
 - An alert message with missing translation for locale
 - An alert message with the missing default language
 - Alert is removed from the database
 - Alert workflow has been removed
 - SaveAlert rule is removed
 - The rule condition is changed after the rule has been generating alerts
- When the alert is triggered, the orphaned alert appears with an error message.



- If the translation for an alert message is missing, it causes an error "EC Alerts: Alert Notification Email Content Error – [[OBJECT_NAME]]".
- If the default language for the alert message is missing, it causes the Job to fail with a "NullPointerException" error. The error is "EC Alerts: EC Alerts and Notifications job fails with "null object loaded from local variable 'conn'".
- If the rule is deleted or changed, existing pending alerts will still be sent and not updated by changing the rule. To prevent duplicate and incorrect alerts from being sent, the Provisioning job must be set with a different Run From date to include records to be scanned again.
 - If the same record is updated, the existing alert will be deleted and it is replaced with a new alert based on the new rule.
- If a new record is inserted (with a different alert date), the existing alert from the previous record will still be sent.

7.13.8 How to stop alerts

- In some conditions, alerts are not desirable, such as loading contract end dates in the past. There are a couple of options to prevent alerts from being triggered:
 - Configure the business rule contexts so that the business rule is not "run".

In **Admin Center -> Manage Business Configuration**, go to the business rule that triggers the alert and click on Details. For the contexts that apply to data loads, such as Imports, Mass Changes, and Off-Cycle Batch Events, change the value to No so that the business rule will not be executed to create the alert.

Details

Base Object: Job Information Model

* Event Type: saveAlert

* Rules: Contract End Date Alert (CONTR...)

Enabled: Yes

Rule Contexts

Edit UI (MSS / ESS): Yes

History UI: Yes

Imports: No

Mass Changes: No

New Recruit/Rehire UI: Yes

OffCycle Batch Events: No

Termination UI: Yes

Finished

Figure 65

- Stop the jobs in Provisioning so that there is no monitoring of dates.
 - Do not schedule the EC Alerts and Notifications in Provisioning
 - Do not schedule the bizX Daily Rules Processing Batch in Provisioning for Off-Cycle Batch Events

7.13.9 How to avoid receiving multiple alerts

- An employee is likely to have multiple records of an end date (e.g., contract end in Job Information) with the same value. If the condition to create an alert is not specific, multiple records may be included for the alert.

In the business rule, use 'Model' base object to compare if the current value is different than the previous value to create the alert.

7.13.10 What not to do in Business Rule for alerts

7.13.10.1 Do not use "Always True" in IF Condition

Variables

If

This rule is always true.
To add an expression please untick the Always True tick box.

Then

Set Alert.Workflow Information to be equal to Employee End Date Alert(Employee_Alert)

Set Alert.Effective Date to be equal to Date Plus()

Base Date: Job Information Model.Contract End Date.Value
Number of Months: 0
Number of Days: -14

Set Alert.Alert Message to be equal to Contract End Date (CONTRACT_END_DATE)

Figure 66

- An alert should be created only for a specific condition to avoid creating alerts for every change. Always set the IF condition in the business rule, and do not use the "Always True" feature.
- "Always True" in the IF Condition will create alerts for ALL records that were modified, even historical records.
- If the alert is for a Termination type of alert, then the "Always True" condition will trigger alerts even if the employees are not terminated.
- If mass creation of incorrect alerts is generated, use Manage Alerts and Notification to delete the alerts created.

7.13.10.2 Do not use "is equal to Date Plus ()" in IF condition

If

Job Information Model.Contract End Date.Value is not equal to Job Information Model.Contract End Date.Previous Value

and

Job Information Model.Contract End Date.Value is not equal to Null

Job Information Model.Contract End Date.Value is equal to Date Plus()

Base Date: Today()
(Optional) Number of Months: Null
(Optional) Number of Days: 14

Then

Set Alert.Workflow Information to be equal to END_DATE_ALERT

Set Alert.Delete Old Pending Alert Flag to be equal to Yes

Set Alert.Effective Date to be equal to Date Plus()

Base Date: Job Information Model.Contract End Date.Value
(Optional) Number of Months: Null
(Optional) Number of Days: -14

Set Alert.Alert Message to be equal to Contract End Date (CONTRACT_END_DATE)

Figure 67

- Alert will only get created if data was last modified and the Job ran successfully on Date Plus () date. If the Job fails on this date, an alert can never be triggered again, even if you change the run date of the Job in Provisioning. In the example above, if the Job fails, when the Job runs successfully the next time (next day), it will have passed the date Plus() result (today + 14 days).

7.13.10.3 Do not use ELSEIF and ELSE

The ELSEIF and ELSE statements are not processed by the rule. If multiple alerts are required (e.g., two months and 1 month before due date), then create one rule per alert.

7.13.11 Deep Link to People Profile in Email Notification

- In the Alert email notification, a deep link can be added to connect user directly to the portlet where the data change is.
- A new tag `[[VIEW_BLOCK_ON_PROFILE]]` can be included in the Alert Description or the Localized Description.

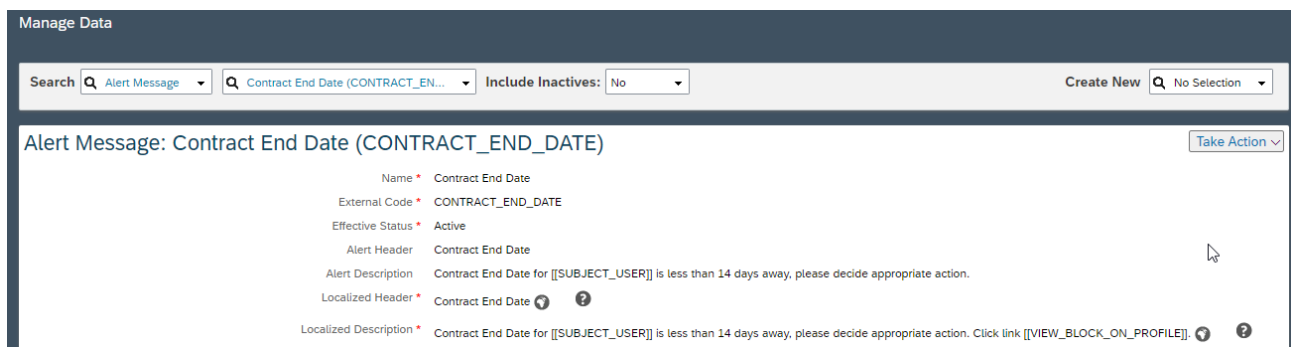


Figure 68

- User clicks on the link to go to the People Profile page, where the data change occurs.

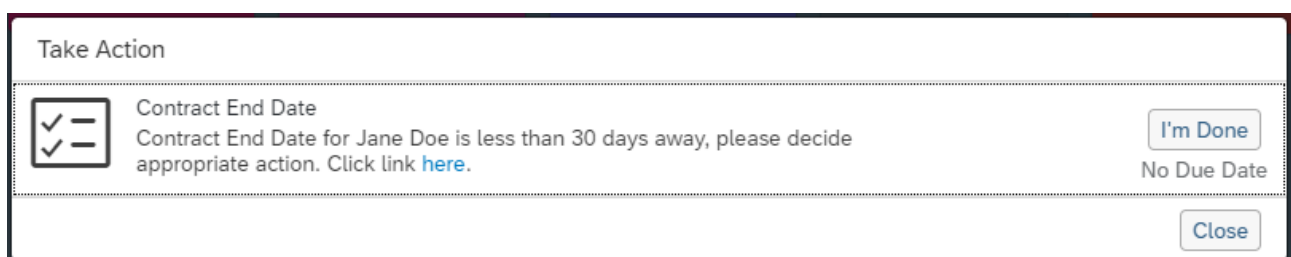


Figure 69

8 REFERENCES

SAP Help Portal

- [Employee Central Master](#)
- [Employee Central Workflow: Implementation and Administration](#)
- [Contingent Workforce Management](#)
- [Implement Employee Central Time Off: Setting up Alerts and Notifications](#)

SAP Notes/KBAs

- [2156278 - How to Set Up EC Alerts and Notifications Using Business Rules](#)
- [2537602 - EC Alerts and Notification Business Rules does not work with Base Object Employment Detail Model](#)
- [2532558 - How To Configure MDF Alerts and Notifications for MDF Objects](#)
- [2431478 - Example Configuration of an EC Alert and Notification Rule](#)
- [2462860 - ARCHIVED - How to Configure EC Alerts and Notifications to be sent on Staggered Dates/Intervals](#)
- [2823437 - Is it possible to configure who will receive an Alert/Notification for work order expiration?](#)
- [2315275 – Employee Central – Workflows & Alerts](#)
- [2431478 – Example Configuration of an EC Alert and Notification Rule](#)
- [2757863 – Manage Alerts and Notifications tool](#)
- [2302229 – Receiving Multiple EC Alerts and Notifications](#)
- [2677124 – EC Alerts: System Logic for when a saveAlert Rule is Removed or Changed](#)
- [2287616 – List of supported tags for EC Workflows and EC Alerts](#)

www.sap.com/contactsap

© 2020 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

The information contained herein may be changed without prior notice. Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors. National product specifications may vary.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, and they should not be relied upon in making purchasing decisions.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. All other product and service names mentioned are the trademarks of their respective companies. See www.sap.com/copyright for additional trademark information and notices.