Understanding the SuccessFactors Employee Centric Approach

successfactors™
An SAP Company

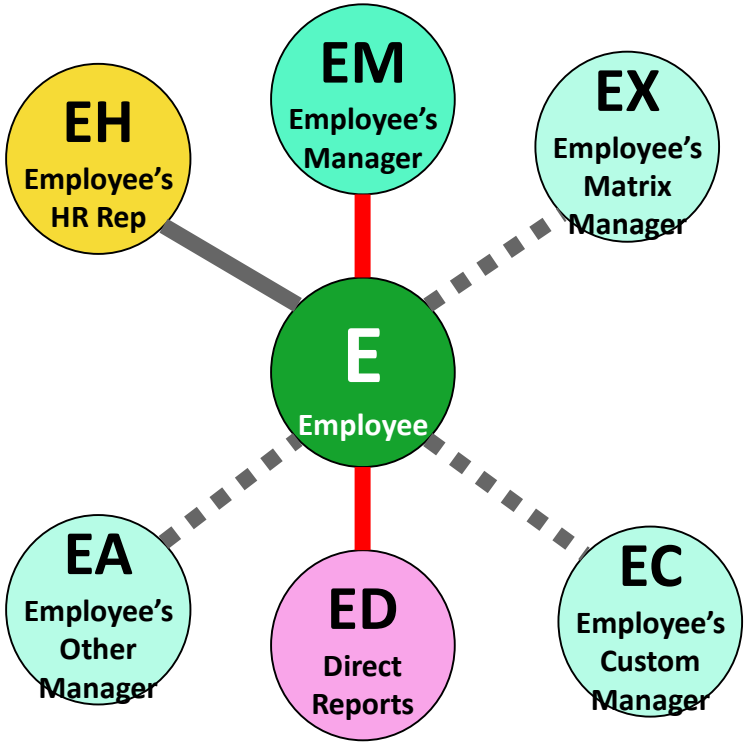
Anthony Johnson
Global Functional Manager
Customer

Employee-Centric System

The SuccessFactors system uses an employee centric approach to controlling relationships and permissions in the system.

All the complex relationships that exist in the customers organization are elegantly defined by the simple act of importing the User Data File.

These roles are extensively used throughout the application and by all modules, so it is important to understand what roles are available and how to analyze someone's relationship to another person when troubleshooting many issues..



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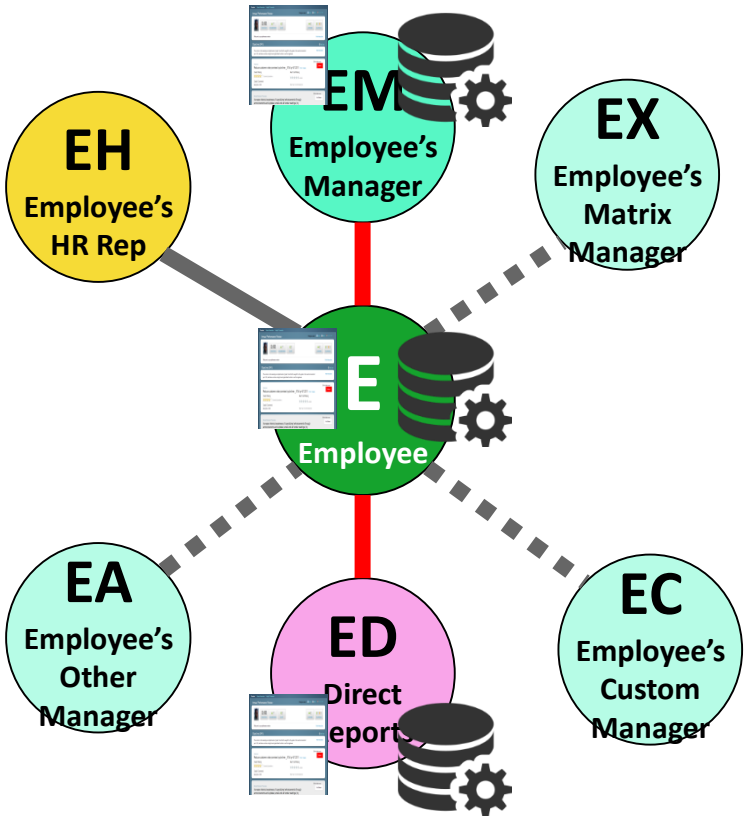
How Owns the Content, Data, Form?

Understanding How Roles Apply to Issues You Are Working

Roles apply to issues in various ways. For example it is **important** to **know who owns the data or form and the relationships of others to this** for issues like:

- Forms not going to right person
- Buttons not showing for right people
- Fields can't be edited
- Sections not showing on a form
- Some features or actions working for some but not others
- Comp worksheets not launching to correct people
- Goals disappearing on goal plans
- Certain managers unable to do certain tasks or required actions
- So called "Security issues" etc. etc.



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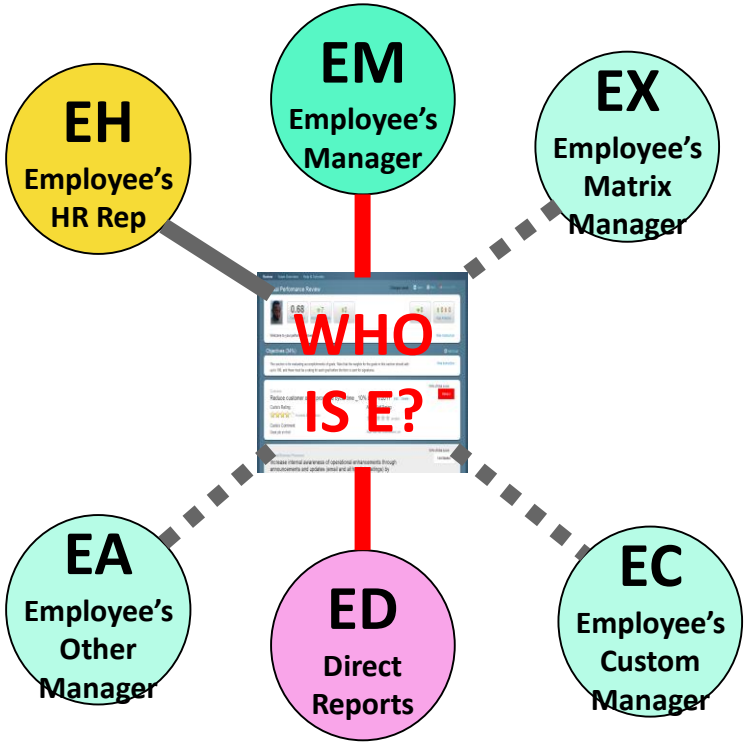
How Owns the Content, Data, Form?

Understanding How Roles Apply to Issues You Are Working

E is who you need to first identify in most issues. And not E compared to you, but E compared to the OWNER of the form, data or permission in question.

For example pretend here you are E. You have a form, and you are the subject of the form. So any issue for the other roles are relative to their roles as related to E.
We need to check permissions based on those roles.



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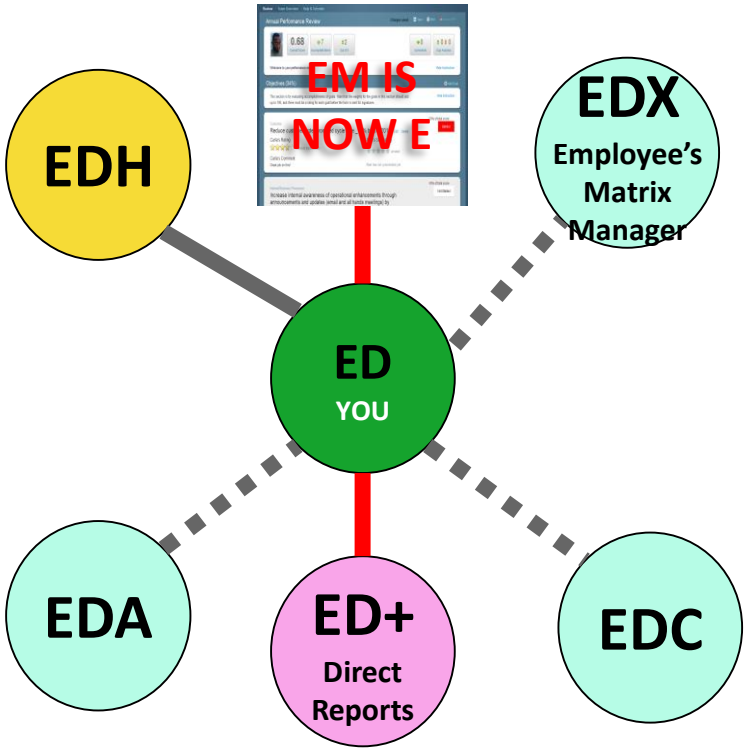
How Owns the Content, Data, Form?

Understanding How Roles Apply to Issues You Are Working

But lets now say the form was not about you, but your Manager. Now you are no longer the E as defined by the SUBJECT OWNER. You are now the ED and your EM is now actually the E as far as content and roles relative to this form are concerned.

Therefore you can easily see that for the **exact same set of people relative to you**, the ROLES have all changed based on who owns the form or data.

Therefore for any issue affecting someone in this group, when figuring out which of the permissions are wrong or missing, it is essential to know which roles the permissions are needed for, ***relative to E.***



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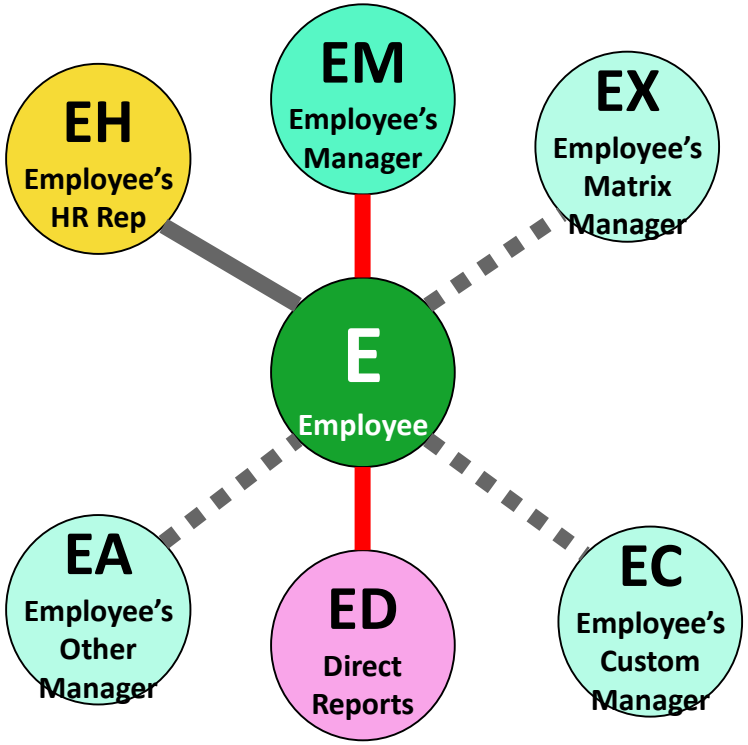
Employee-Centric System

The SuccessFactors system uses an employee centric approach to controlling relationships and permissions in the system.

The user data file (employee import) has defined columns for the following Manager types:
MANAGER – all EM type roles
HR Manager – All EH type roles
MATRIX_MANAGER – All EX type roles
SECOND_MANAGER – All EA type roles
CUSTOM_MANAGER – All EC type roles
System automatically defines any “D” type roles so these are never defined anywhere. Neither are any MMM or + type roles.



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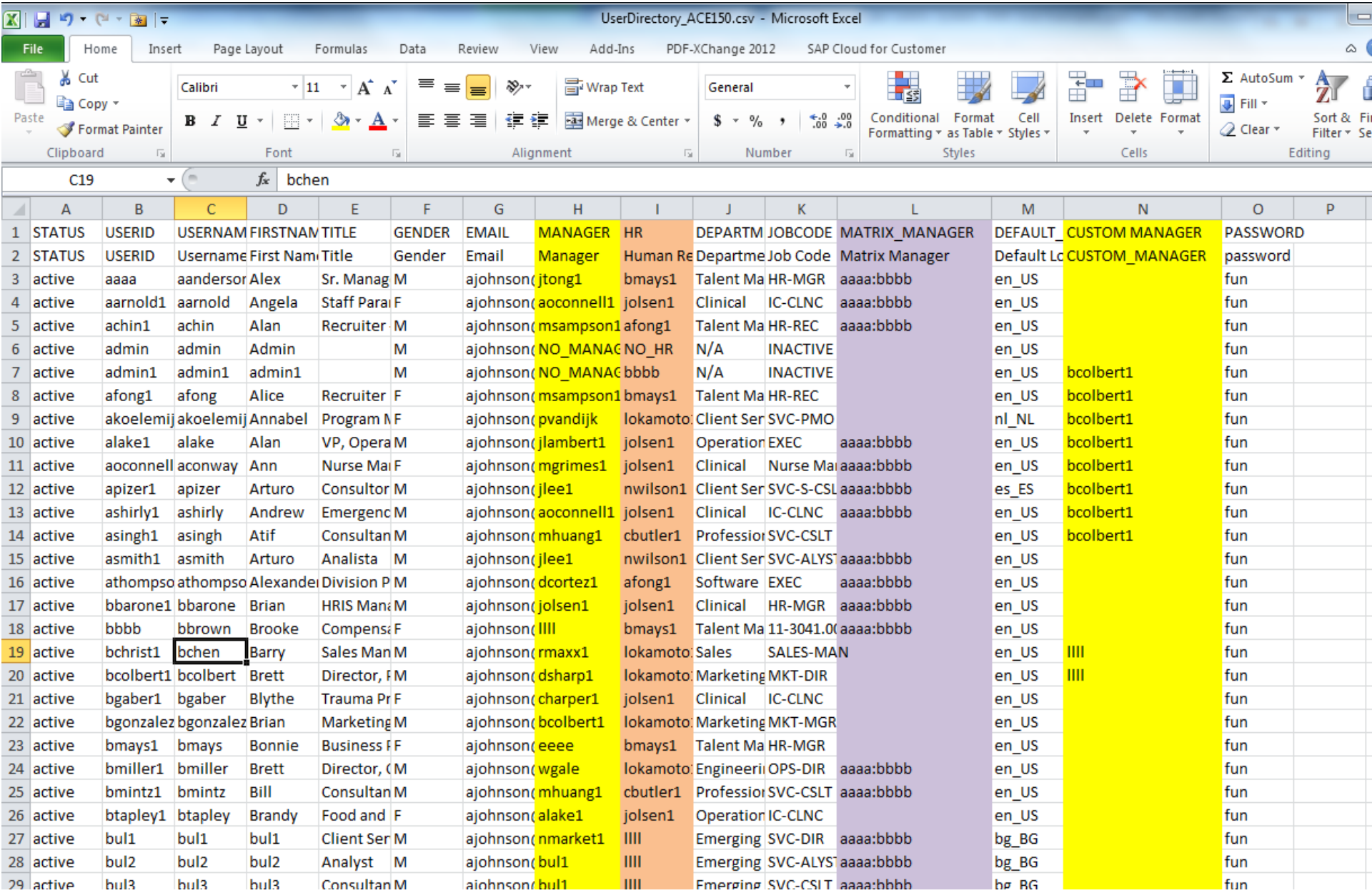
Example User Data File



UserDirectory_ACE150.csv - Microsoft Excel

File | Home | Insert | Page Layout | Formulas | Data | Review | View | Add-Ins | PDF-XChange 2012 | SAP Cloud for Customer

Cell C19: bchen

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	STATUS	USERID	USERNAM	FIRSTNAM	TITLE	GENDER	EMAIL	MANAGER	HR	DEPARTM	JOBCODE	MATRIX_MANAGER	DEFAULT_	CUSTOM MANAGER	PASSWORD	
2	STATUS	USERID	Username	First Nam	Title	Gender	Email	Manager	Human Re	Departme	Job Code	Matrix Manager	Default Lc	CUSTOM_MANAGER	password	
3	active	aaaa	aandersor	Alex	Sr. Manag	M	ajohnson(	jtong1	bmays1	Talent Ma	HR-MGR	aaaa:bbbb	en_US		fun	
4	active	aarnold1	aarnold	Angela	Staff Para	F	ajohnson(	aoconnell1	jolsen1	Clinical	IC-CLNC	aaaa:bbbb	en_US		fun	
5	active	achin1	achin	Alan	Recruiter	M	ajohnson(	msampson1	afong1	Talent Ma	HR-REC	aaaa:bbbb	en_US		fun	
6	active	admin	admin	Admin		M	ajohnson(	NO_MANAC	NO_HR	N/A	INACTIVE		en_US		fun	
7	active	admin1	admin1	admin1		M	ajohnson(	NO_MANAC	bbbb	N/A	INACTIVE		en_US	bcolbert1	fun	
8	active	afong1	afong	Alice	Recruiter	F	ajohnson(	msampson1	bmays1	Talent Ma	HR-REC		en_US	bcolbert1	fun	
9	active	akoelemij	akoelemij	Annabel	Program M	F	ajohnson(	pvandijk	lokamoto	Client Ser	SVC-PMO		nl_NL	bcolbert1	fun	
10	active	alake1	alake	Alan	VP, Opera	M	ajohnson(	jlambert1	jolsen1	Operation	EXEC	aaaa:bbbb	en_US	bcolbert1	fun	
11	active	aoconnell	aconway	Ann	Nurse Mai	F	ajohnson(	mgrimes1	jolsen1	Clinical	Nurse Mai	aaaa:bbbb	en_US	bcolbert1	fun	
12	active	apizer1	apizer	Arturo	Consultor	M	ajohnson(	jlee1	nwilson1	Client Ser	SVC-S-CSL	aaaa:bbbb	es_ES	bcolbert1	fun	
13	active	ashirly1	ashirly	Andrew	Emergenc	M	ajohnson(	aoconnell1	jolsen1	Clinical	IC-CLNC	aaaa:bbbb	en_US	bcolbert1	fun	
14	active	asingh1	asingh	Atif	Consultan	M	ajohnson(	mhuang1	cbutler1	Professior	SVC-CSLT		en_US	bcolbert1	fun	
15	active	asmith1	asmith	Arturo	Analista	M	ajohnson(	jlee1	nwilson1	Client Ser	SVC-ALYS	aaaa:bbbb	en_US		fun	
16	active	athompso	athompso	Alexande	Division P	M	ajohnson(	dcortez1	afong1	Software	EXEC	aaaa:bbbb	en_US		fun	
17	active	bbarone1	bbarone	Brian	HRIS Mana	M	ajohnson(	jolsen1	jolsen1	Clinical	HR-MGR	aaaa:bbbb	en_US		fun	
18	active	bbbb	bbrown	Brooke	Compensa	F	ajohnson(	llll	bmays1	Talent Ma	11-3041.0(	aaaa:bbbb	en_US		fun	
19	active	bchrist1	bchen	Barry	Sales Man	M	ajohnson(	rmaxx1	lokamoto	Sales	SALES-MAN		en_US	llll	fun	
20	active	bcolbert1	bcolbert	Brett	Director, F	M	ajohnson(	dsharp1	lokamoto	Marketing	MKT-DIR		en_US	llll	fun	
21	active	bgaber1	bgaber	Blythe	Trauma Pr	F	ajohnson(	charper1	jolsen1	Clinical	IC-CLNC		en_US		fun	
22	active	bgonzalez	bgonzalez	Brian	Marketing	M	ajohnson(	bcolbert1	lokamoto	Marketing	MKT-MGR		en_US		fun	
23	active	bmays1	bmays	Bonnie	Business F	F	ajohnson(	eeee	bmays1	Talent Ma	HR-MGR		en_US		fun	
24	active	bmiller1	bmiller	Brett	Director, (	M	ajohnson(	wgale	lokamoto	Engineeri	OPS-DIR	aaaa:bbbb	en_US		fun	
25	active	bmintz1	bmintz	Bill	Consultan	M	ajohnson(	mhuang1	cbutler1	Professior	SVC-CSLT	aaaa:bbbb	en_US		fun	
26	active	btapley1	btapley	Brandy	Food and	F	ajohnson(	alake1	jolsen1	Operation	IC-CLNC		en_US		fun	
27	active	bul1	bul1	bul1	Client Ser	M	ajohnson(	nmarket1	llll	Emerging	SVC-DIR	aaaa:bbbb	bg_BG		fun	
28	active	bul2	bul2	bul2	Analyst	M	ajohnson(	bul1	llll	Emerging	SVC-ALYS	aaaa:bbbb	bg_BG		fun	
29	active	bul3	bul3	bul3	Consultan	M	ajohnson(	bul1	llll	Emerging	SVC-CSLT	aaaa:bbbb	bg_BG		fun	

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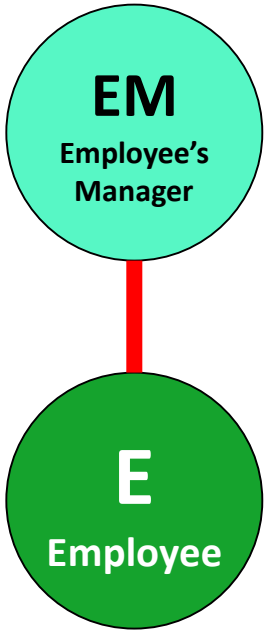
Employee-Centric System

Most roles identify a relationship to the employee:

Employee's Manager

Everybody MUST have 1 EM defined

- Determines hierarchy
- Report filter
- Rating of Record
- Used in
  - Workflow
  - Form permissions
  - Goal permissions
  - Data model permissions



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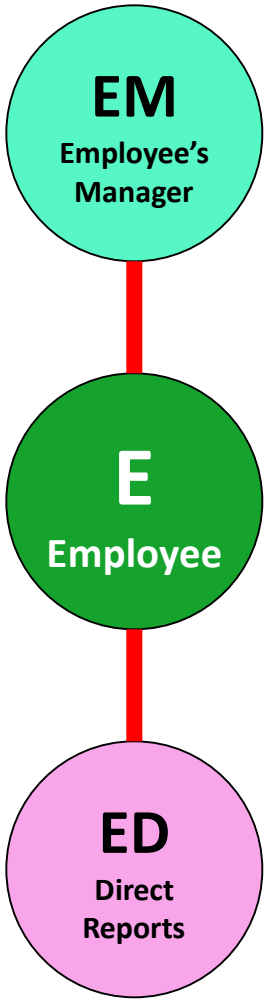
Employee-Centric System

Employee's Manager

Employee's Direct Reports

You may or may not have ED's

- Used in
  - Form permissions
  - Goal permissions



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Employee-Centric System

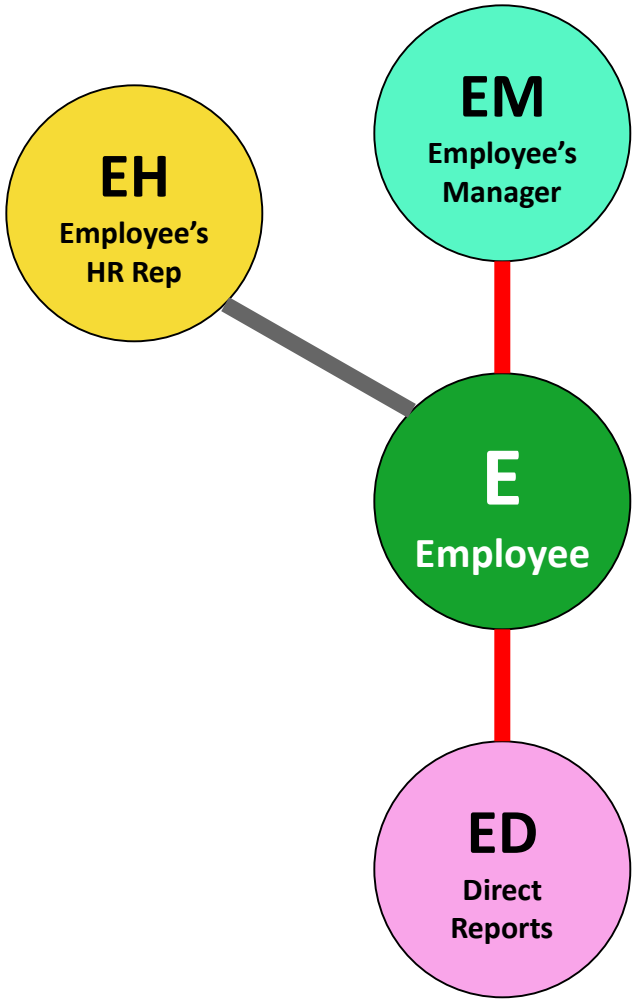
Employee's Manager

Employee's Direct Reports

Employee's HR Rep

Everyone will always have 1 EH

- Report filter
- HR Inbox
- Used in
  - Workflow
  - Form permissions
  - Goal permissions
  - Data model permissions



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Employee-Centric System

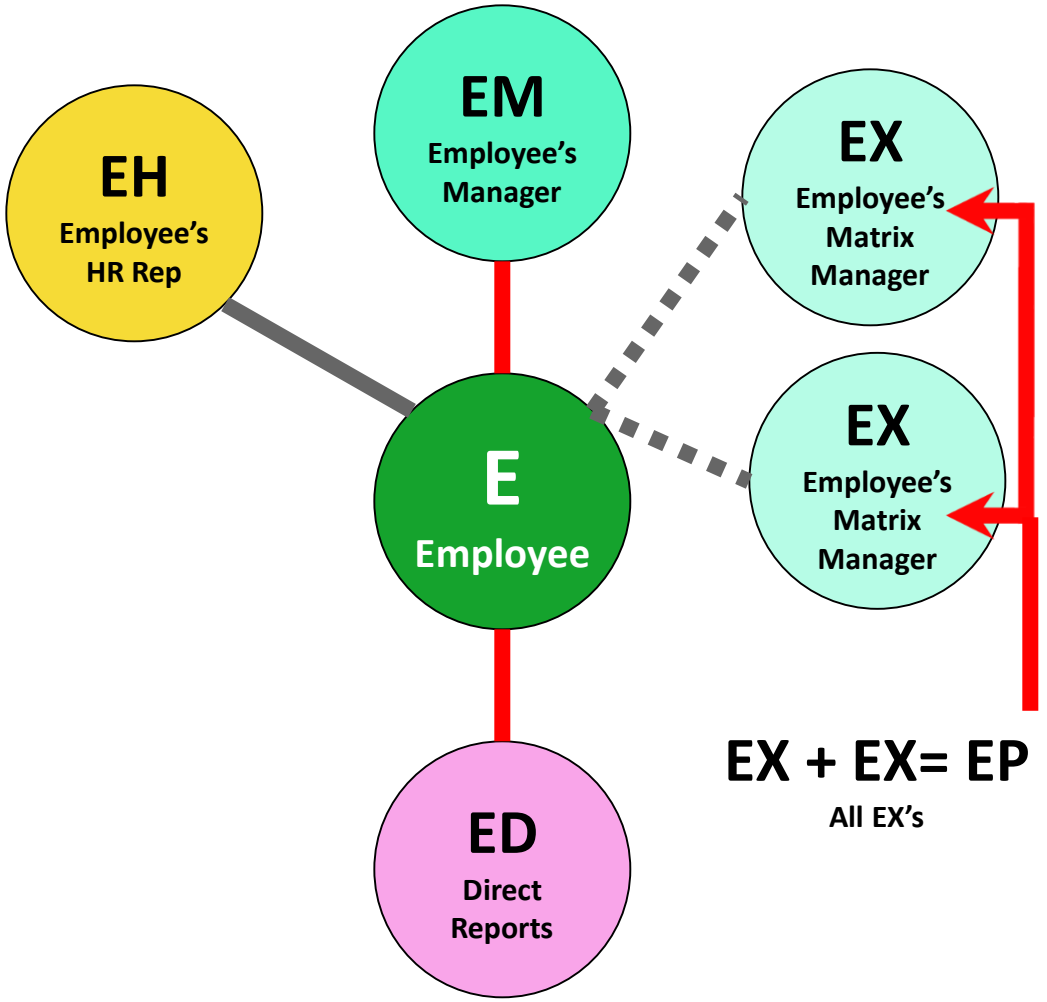
Employee's Manager

Employee's Direct Reports

Employee's HR Rep

Employee's Matrix Manager

- Report filter
- Used in
  - Workflow
  - Form permissions
  - Goal permissions
  - Data model permissions
- Multiples allowed
- EP = All Matrix Managers



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Employee-Centric System

Employee's Manager

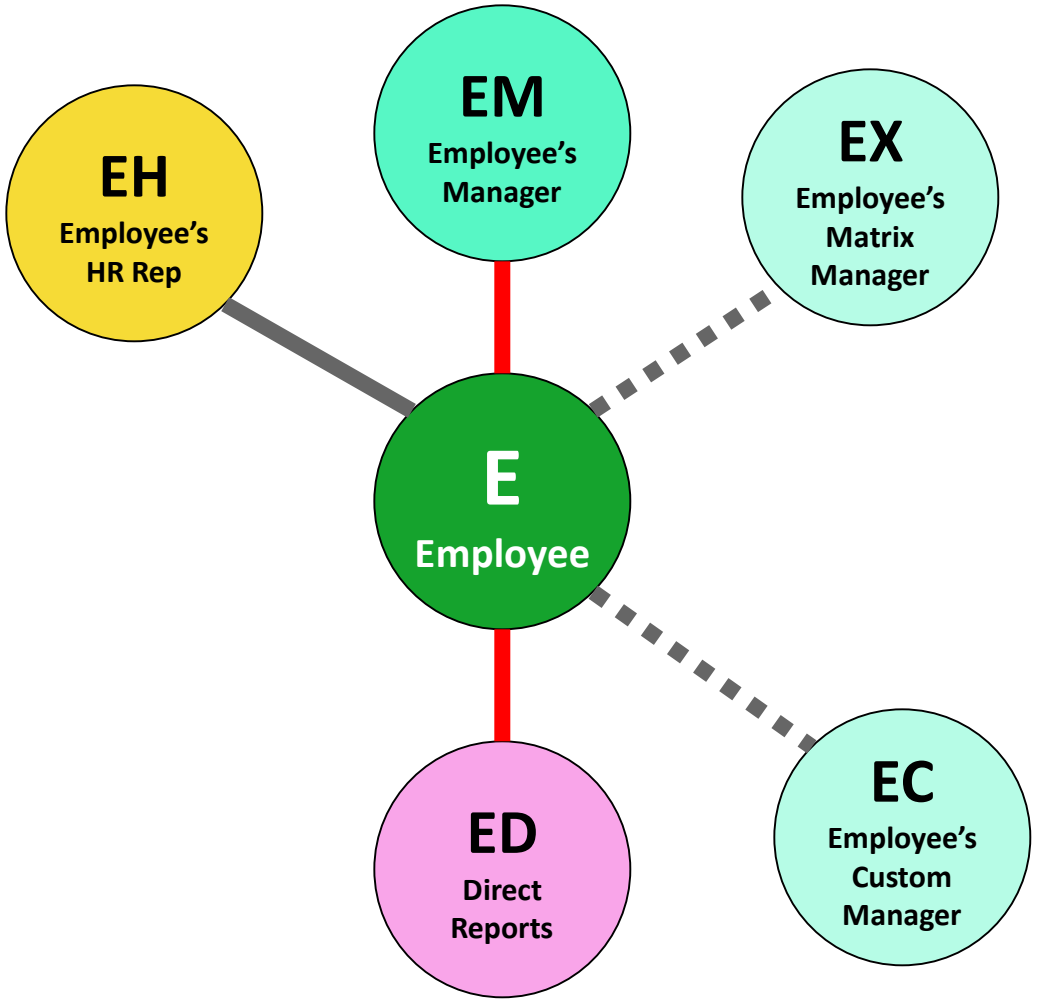
Employee's Direct Reports

Employee's HR Rep

Employee's Matrix Manager

Employees Custom Manager

- Report filter
- Used in
  - Form permissions
  - Data model permissions
- Multiples allowed
- May not have any defined



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Employee-Centric System

Employee's Manager

Employee's Direct Reports

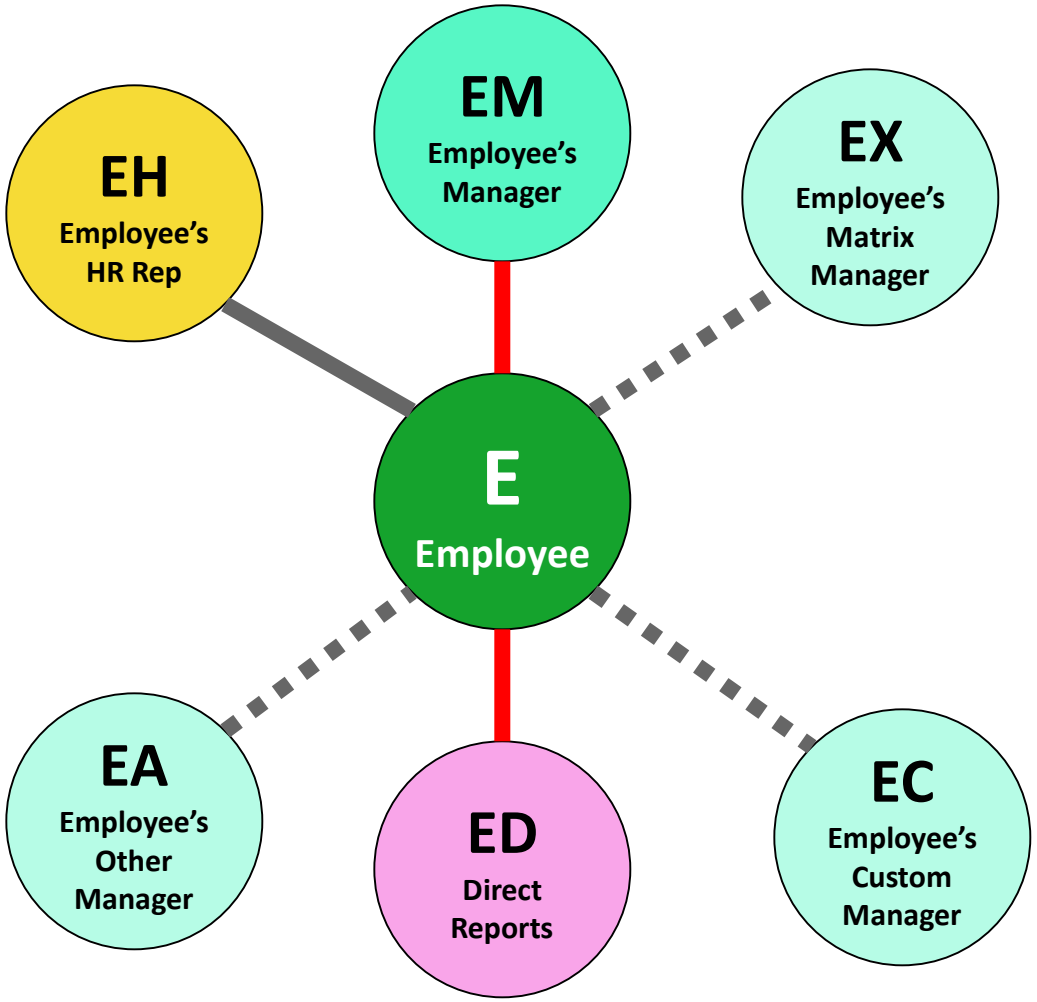
Employee's HR Rep

Employee's Matrix Manager

Employees Custom Manager

Employee's Second Manager

- Used in
  - Primarily for Compensation
  - Workflow
  - Form permissions
  - Goal permissions



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Next Up..

Main Roles in Employee Centric Approach

Other Roles & Derivatives

Dotted Line Managers – Special Considerations

Org Chart Demonstration

Goal Reporting Relationships

Test

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Other Roles

Role	Description	Derivative Roles
ER	Custom Manager's Direct Reports	ERD, ERD+
EB	Second Manager's Direct Reports	EBD, EBD+
F	Form Reviewer – Used by goal plan to allow edits in PM form	
U	User step by username – workflow only	
F	Job Family Expert - Used by Healthcare workflow	
O	Originator	OM, OM+
OP	Objective Parent	
OC	Objective Child	
*	Everyone	
	360 Process Owner	
	360 Approvers	
	Users with Detailed Report Privilege	

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Derivative Roles

"E" may be followed by any combination of "M", "D", and "H" with optional modifiers "+", "*", "?" to specify complex employee relative roles.

M employee's manager
X employee's matrix manager
D employee's direct report
H employee's HR representative

(In the notation below, "X" is one of "M", "D", or "H" as defined above)
X? X is optional (zero or one of X)
X* zero or more of X
X+ one or more of X

As an example, here are a few common roles:

EM employee's manager
EX employee's matrix manager (currently only one level)
EA employee's 2nd manager
ED employee's direct report
EB employee 2nd manager's direct report
EH employee's HR rep
EM+ employee's manager, manager's manager, etc...
ED+ employee's direct and indirect reports
EMM employee's manager's manager (only)
EMD employee's manager's direct reports (coworkers)

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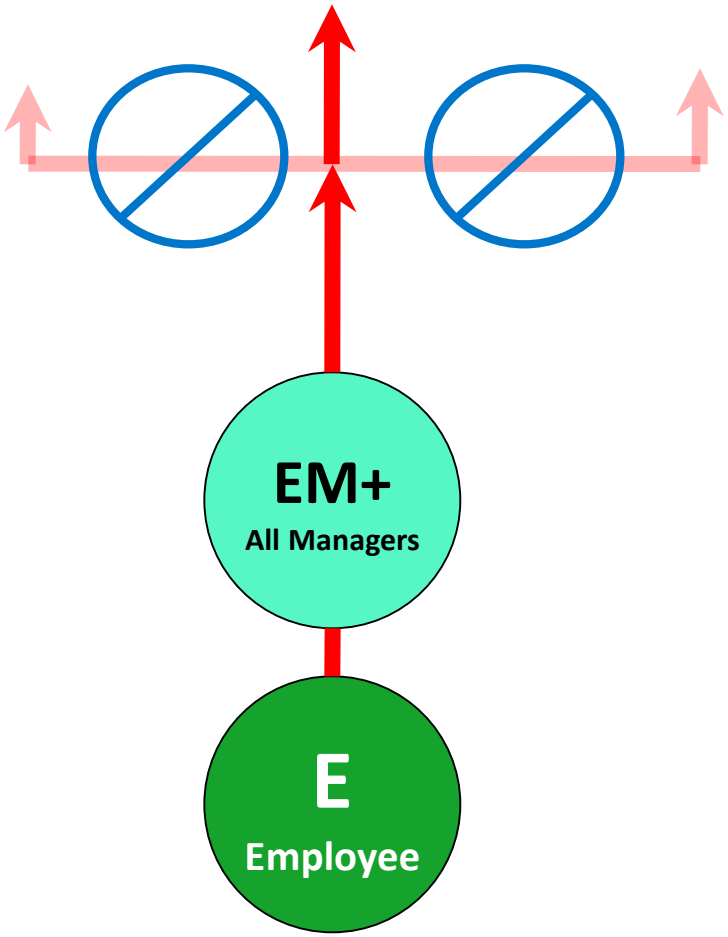
Derivative Roles

Manager's Manager

All Managers up the hierarchy



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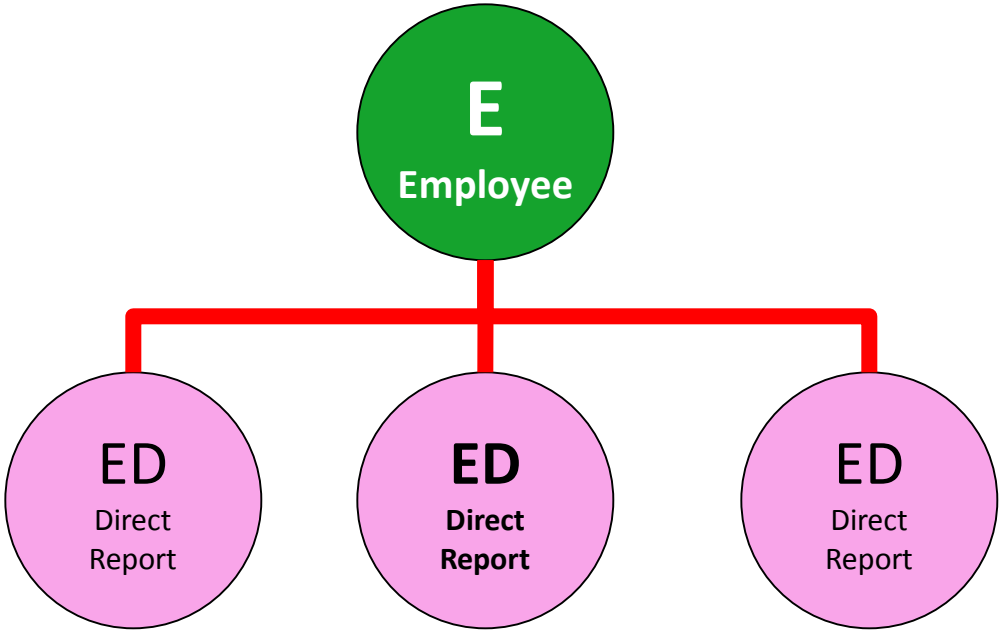
Derivative Roles

Direct Reports



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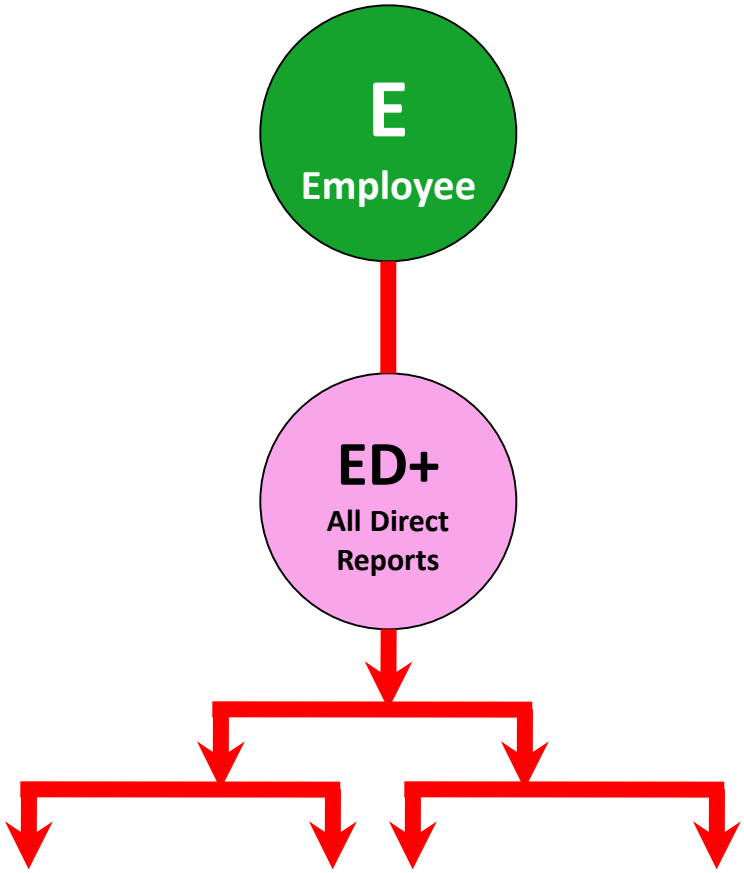
Derivative Roles

Direct Reports

Direct Reports down the hierarchy



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Derivative Roles

Manager's Manager

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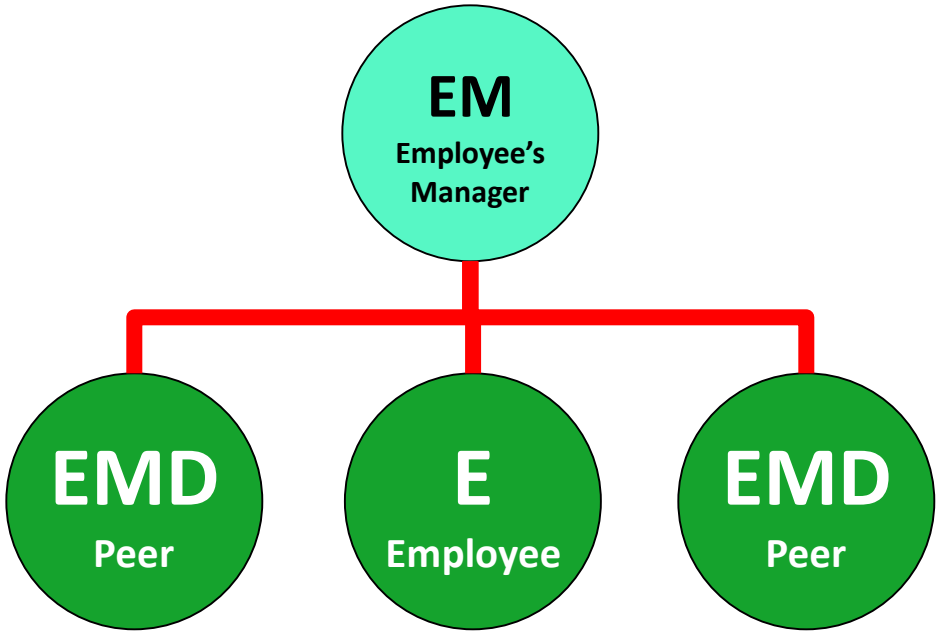
Derivative Roles

Employees reporting to the same manager



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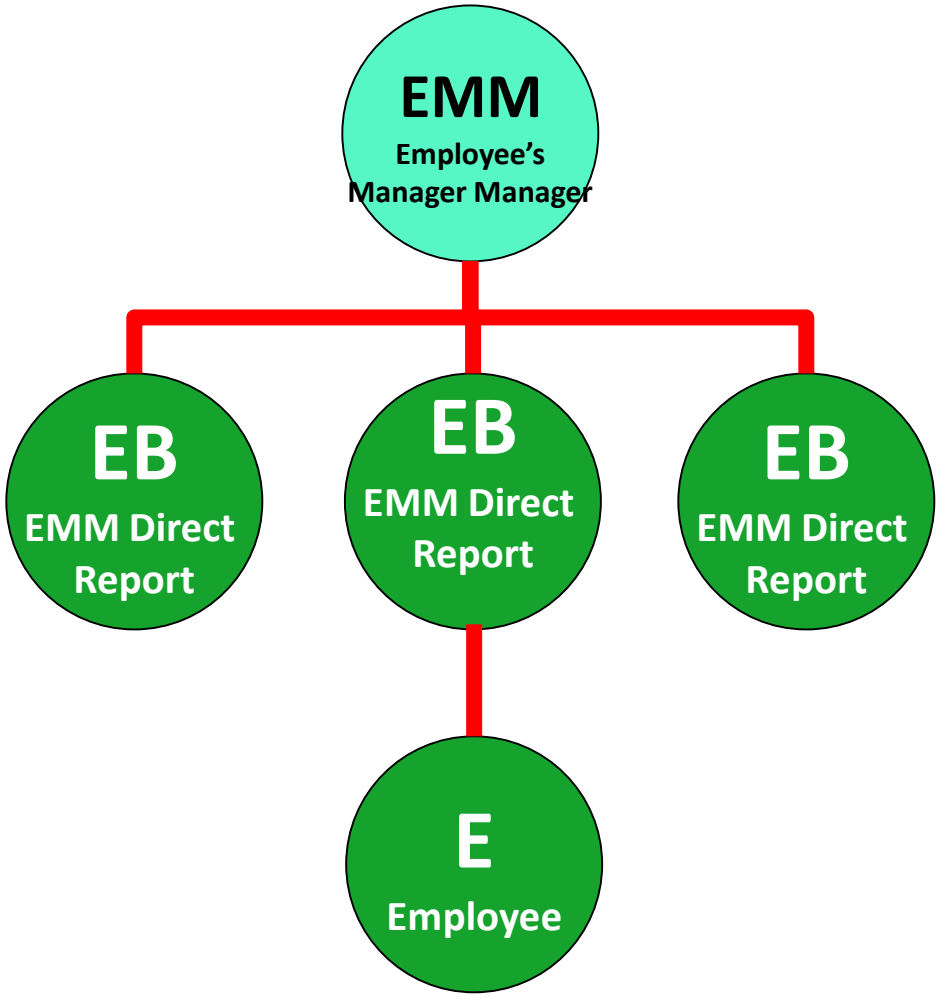
Derivative Roles

Employees 2nd level managers direct reports (very uncommon but interesting)



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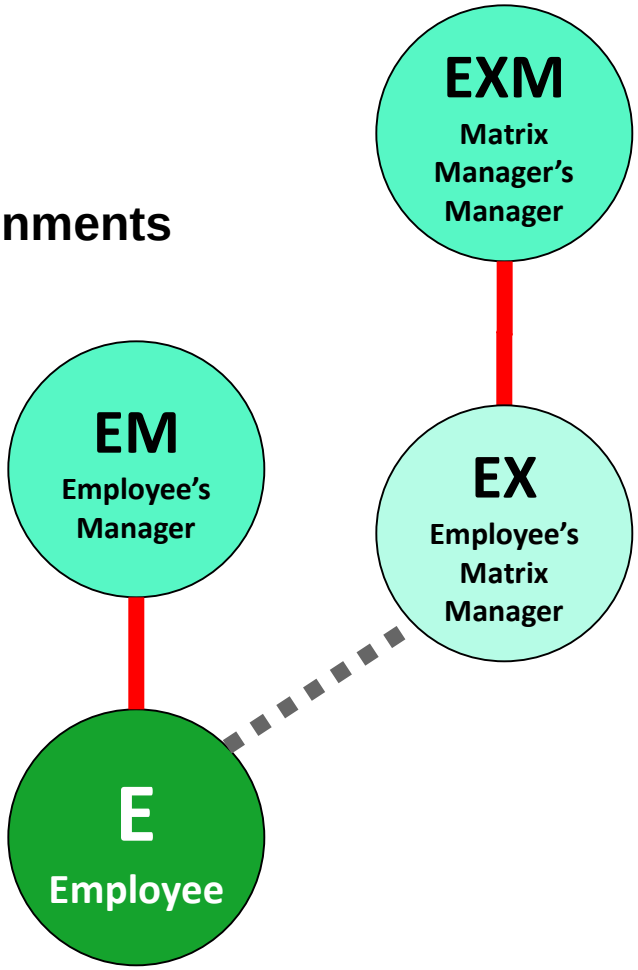
Extended Derivative Roles

Matrix Manager's Manager

- Notice dotted line type of relationship
- Typically used for project based assignments



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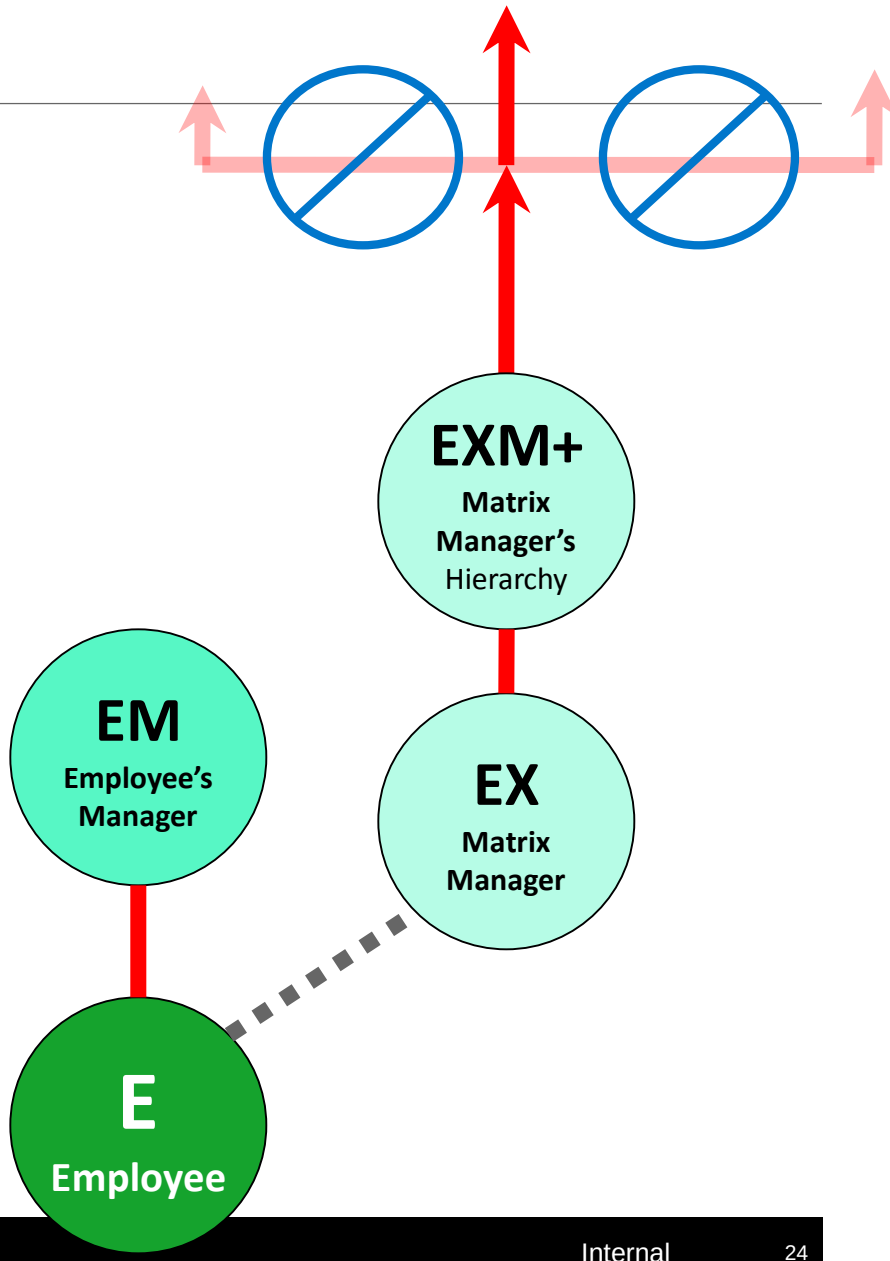
Extended Derivative Roles

Matrix Manager's Manager

Matrix Manager's Hierarchy



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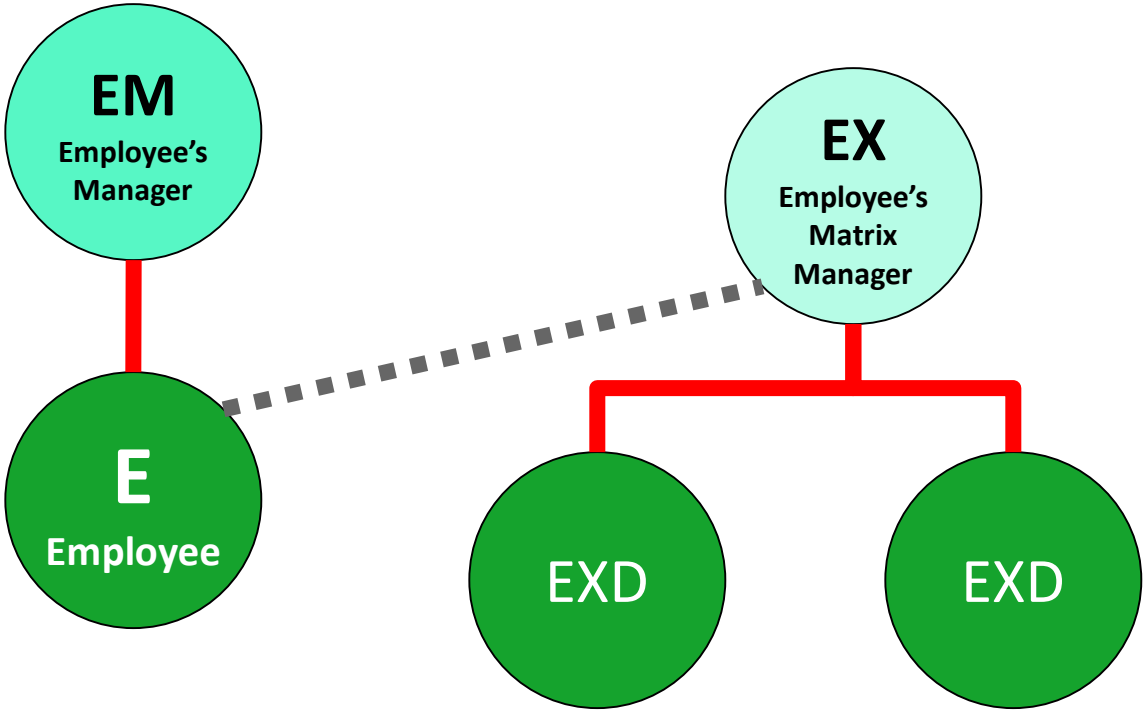
Extended Derivative Roles

Matrix Manager's Direct Reports



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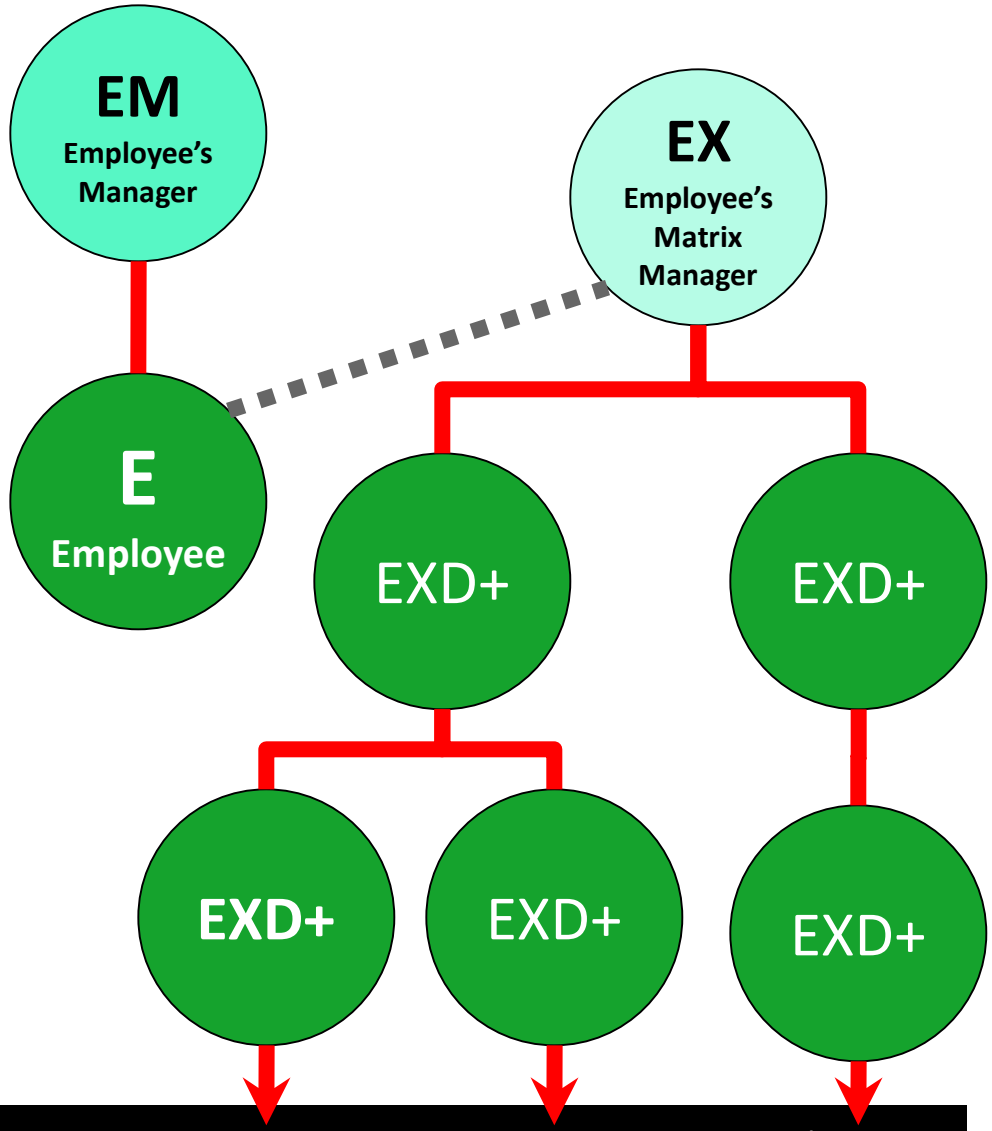
Extended Derivative Roles

All Matrix Manager's Reports



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Other Derivatives

Role	Description
ER	Custom Manager's Direct Reports
ECD	Custom Manager's Direct Reports
ECD+	All Custom Manager's Reports
ECM	Custom Manager's Manager
ECM+	Custom Manager's Hierarchy
EB	Second Manager's Direct Reports
EAD	Second Manager's Direct Reports
EAD+	All Second Manager's Reports
EAM	Second Manager's Manager
EAM+	Second Manager's Hierarchy
EHD	HR's Direct Reports
EHD+	All HR's Reports
EHM	HR's Manager
EHM+	HR's Hierarchy

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Recruiting Roles & Derivatives

Role	Description	Derivative Roles
R	Recruiter	RM, RM+, RD, RD+, RMD, RMD+, RX, RP, RXM, RXM+, RXMD/RY, RXMD+, RH, RHM, RHM+, RA, RB, RC, RR
T	Primary Coordinator	TM, TM+, TD, TD+, TMD, TMD+, TX, TP, TXM, TXM+, TXMD/TY, TXMD+, TH, THM, THM+, TA, TB, TC, TR
G	Hiring Manager	GM, GM+, GD, GD+, GMD, GMD+, GX, GP, GXM, GXM+, GXMD/GY, GXMD+, GH, GHM, GHM+, GA, GB, GC, GR
S	Sourcer	SM, SM+, SD, SD+, SMD, SMD+, SX, SP, SXM, SXM+, SXMD/SY, SXMD+, SH, SHM, SHM+, SA, SB, SC, SR

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Main Roles in Employee Centric Approach

Other Roles & Derivatives

Dotted Line Managers – Special Considerations

Org Chart Demonstration

Goal Reporting Relationships

Test

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Dotted Line Managers – Special Considerations

- Do not work in extended derivatives (EMX, EXX, EMC, EMA)
- Not available in 360

Matrix Manager (EX)

- Designed for a true dotted line relationship in which the EX has a role in managing performance
- EP role in workflow creates an iterative step
- Matrix Manager will appear on goal plan & org chart unless you set Matrix Manager Threshold (Provisioning > Company Settings) to zero.

Second Manager (EA)

- Designed for Compensation where the approval hierarchy is different from reporting relationships
- Not available in Succession or Goal Plans

Custom Manager (EC)

- Designed for Succession Planning/Live Profile permissions
- Not available in workflow
- Can be use in form permissions so might be used in U step

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Complex Derivatives – Special Considerations

Important to know:

- The time it takes to resolve a role is relative to its length.
- The modifiers can drastically increase the time to resolve an access right.
- Although using more than one modifier in a role name is supported, it can hinder performance (e.g. do NOT use something like "EMMMD+").
- We recommend clients use the shortest derivatives possible to prevent system slowness.
  - EM+ is better than EMMMMMM. EB is better than EMMD

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Complex Derivatives – Special Considerations

Important to know:

- For every page viewed the system has to evaluate who you are, then resolve the permissions set at the data model level + template/field level + admin tools + RBP, to determine what your role is allowed to see. Multiply that x number of users in system.
- As a dynamic software application these complex relationships and calculations are happening at extremely fast rates, but every variable increases complexity and time to resolve.
- If there is general slowness within the module, complex role derivatives is one aspect support engineers will want to review to determine if this may be a contributing factor.
- Complex and extensive Role-Based Permissions can also impact page loading by up to 30%!
  - This can mean a small page that might take 3 secs for 1 customer takes 10 secs for another. If it was a large page that took 20 seconds, it may now take 30 seconds which could be unacceptable for the users.

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Other Roles & Derivatives

Dotted Line Managers – Special Considerations

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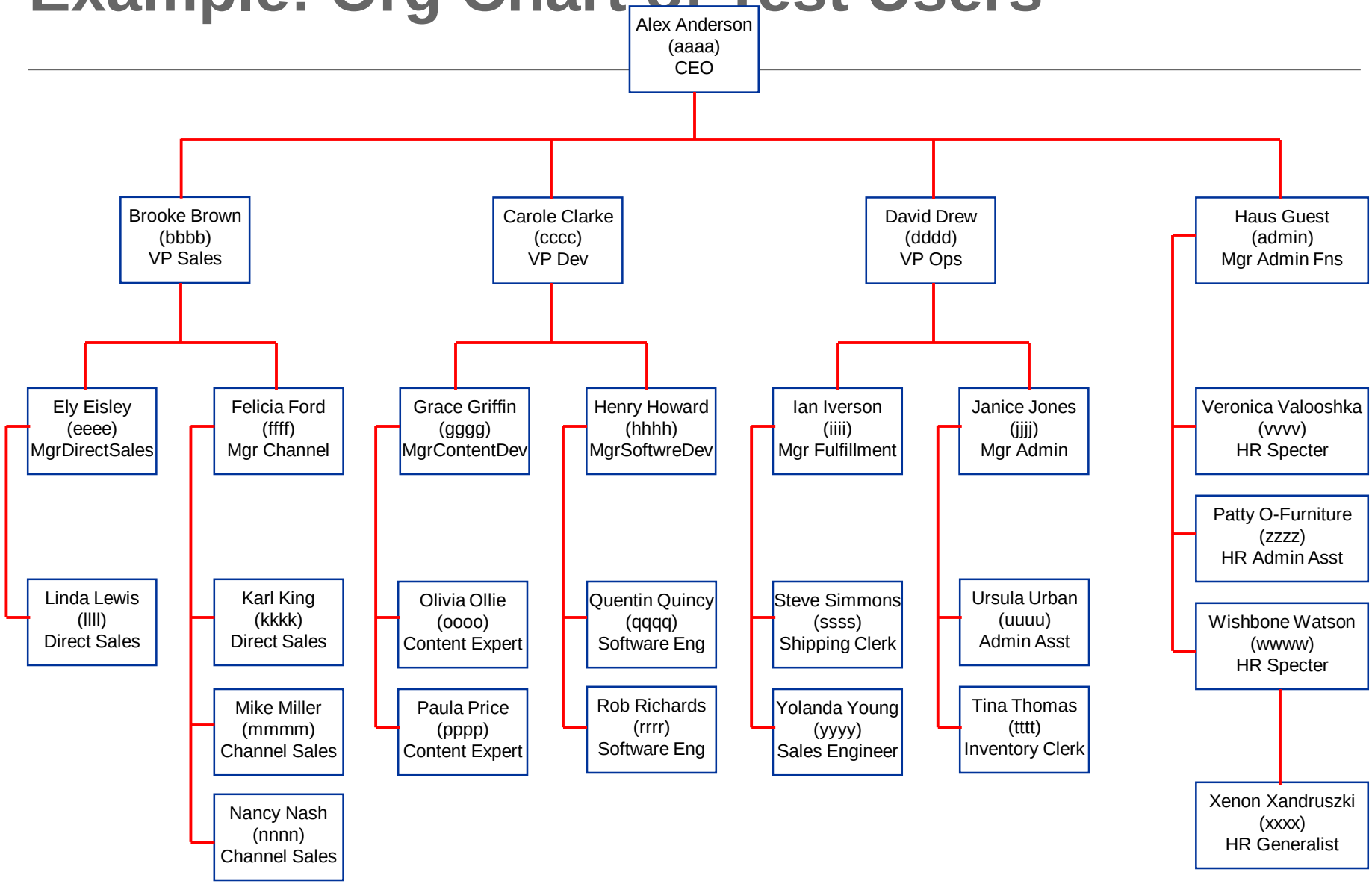
Example: Org Chart of Test Users



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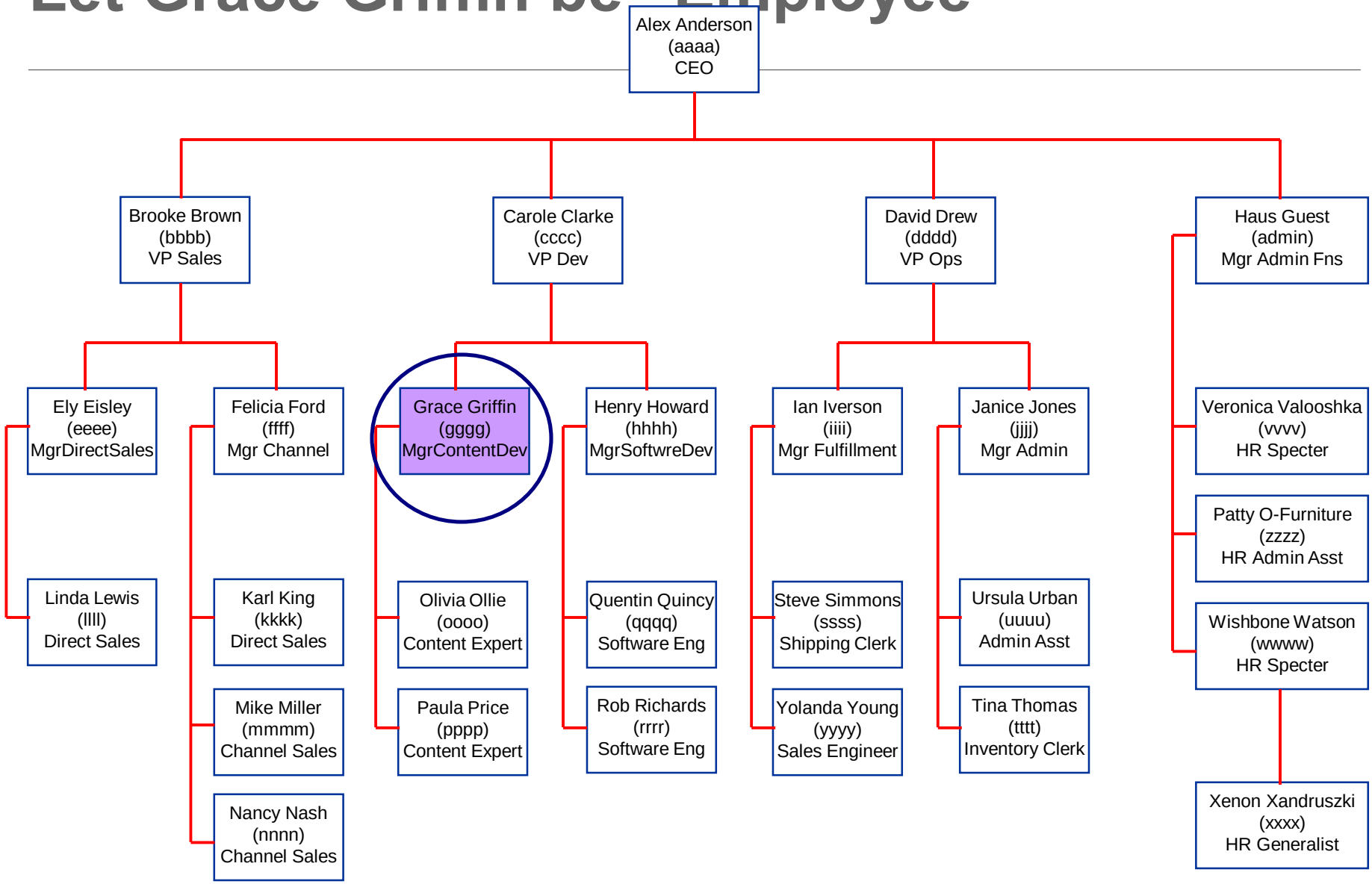
Let Grace Griffin be “Employee”



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Reporting relationship determines who can see Employee's data

E

EM

EMM

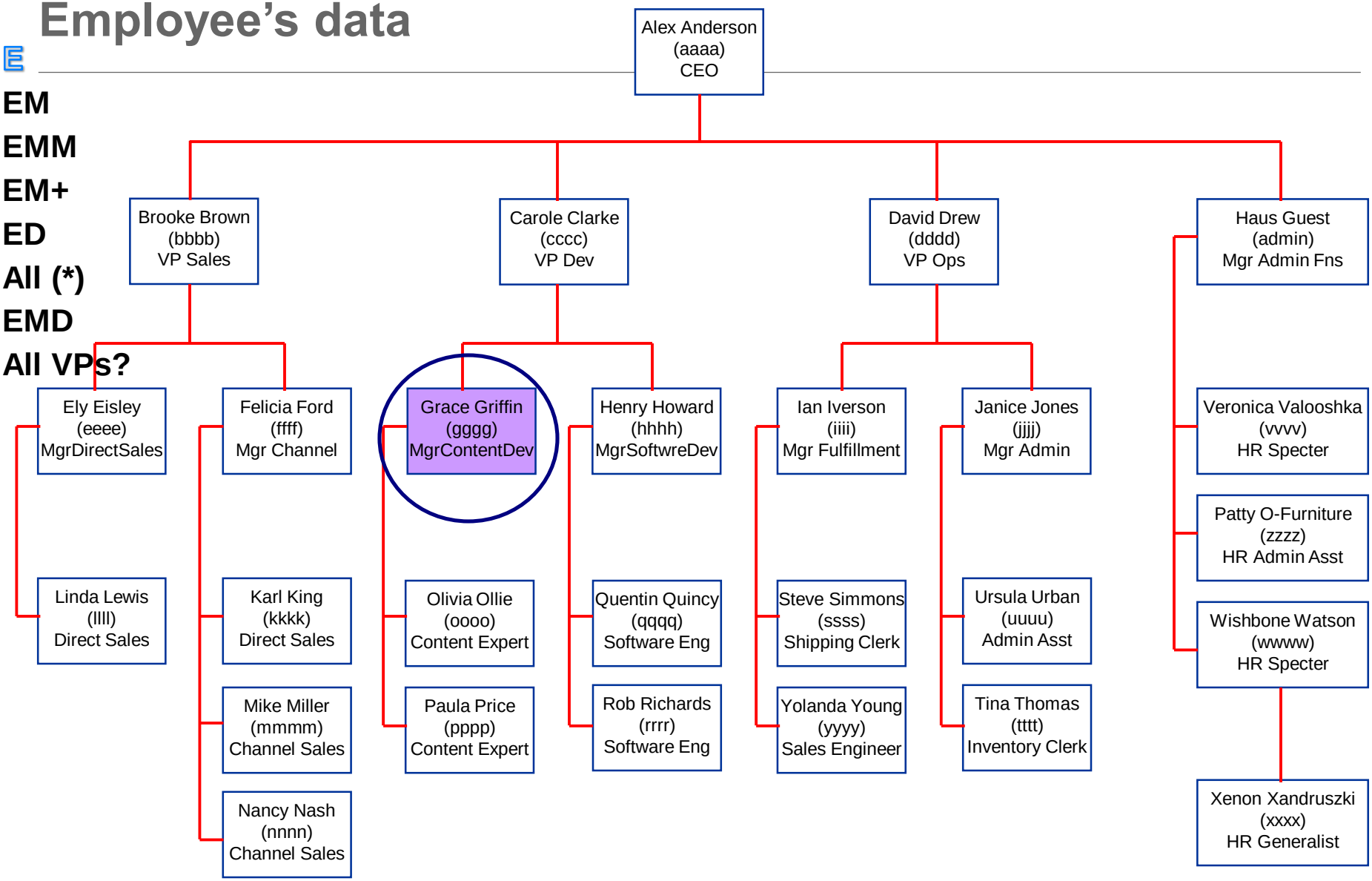
EM+

ED

All (*)

EMD

All VPs?



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Employee can see Employee's data

E

EM

EMM

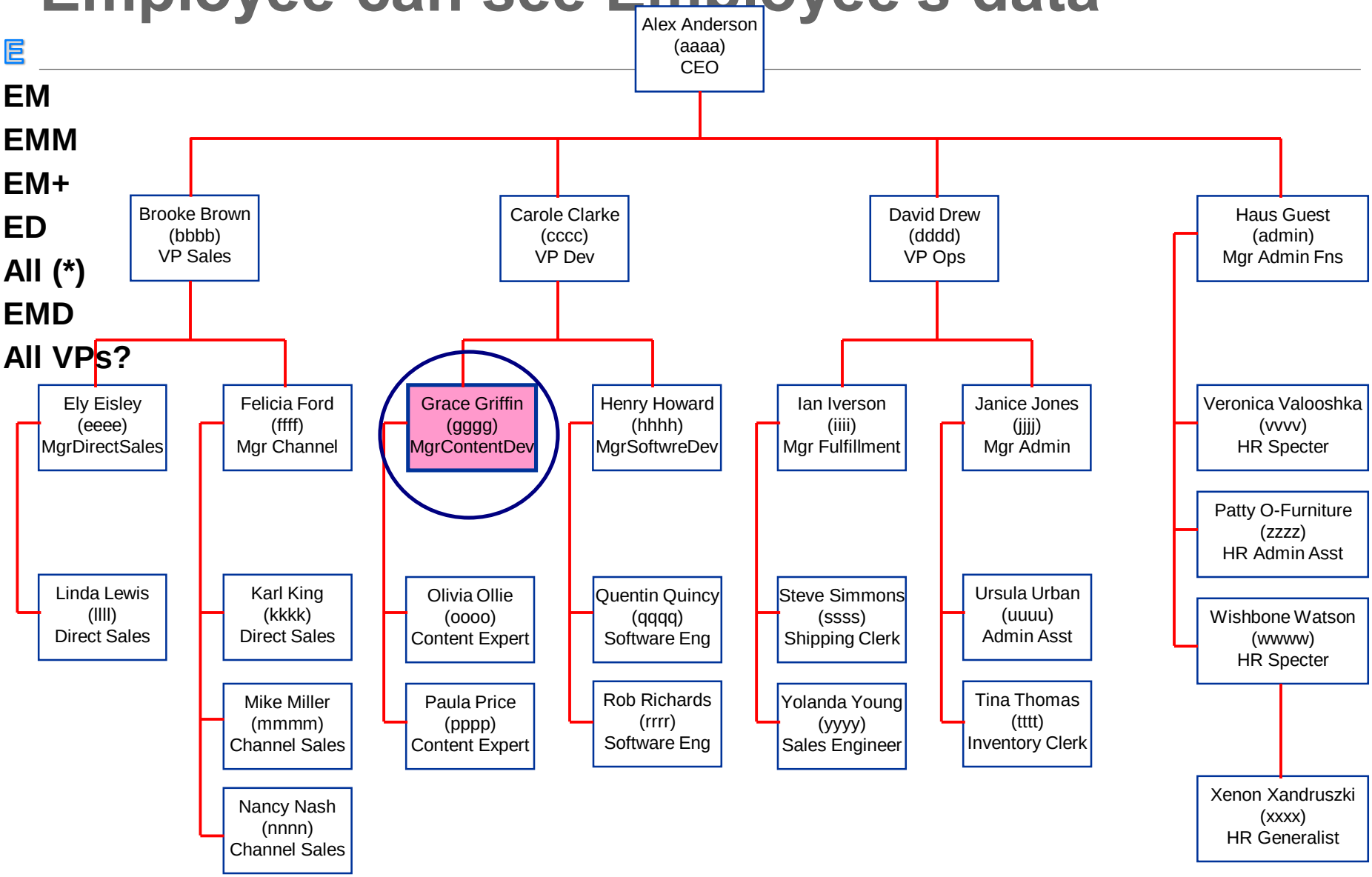
EM+

ED

All (*)

EMD

All VPs?



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Manager can see Employee's data

E

EM

EMM

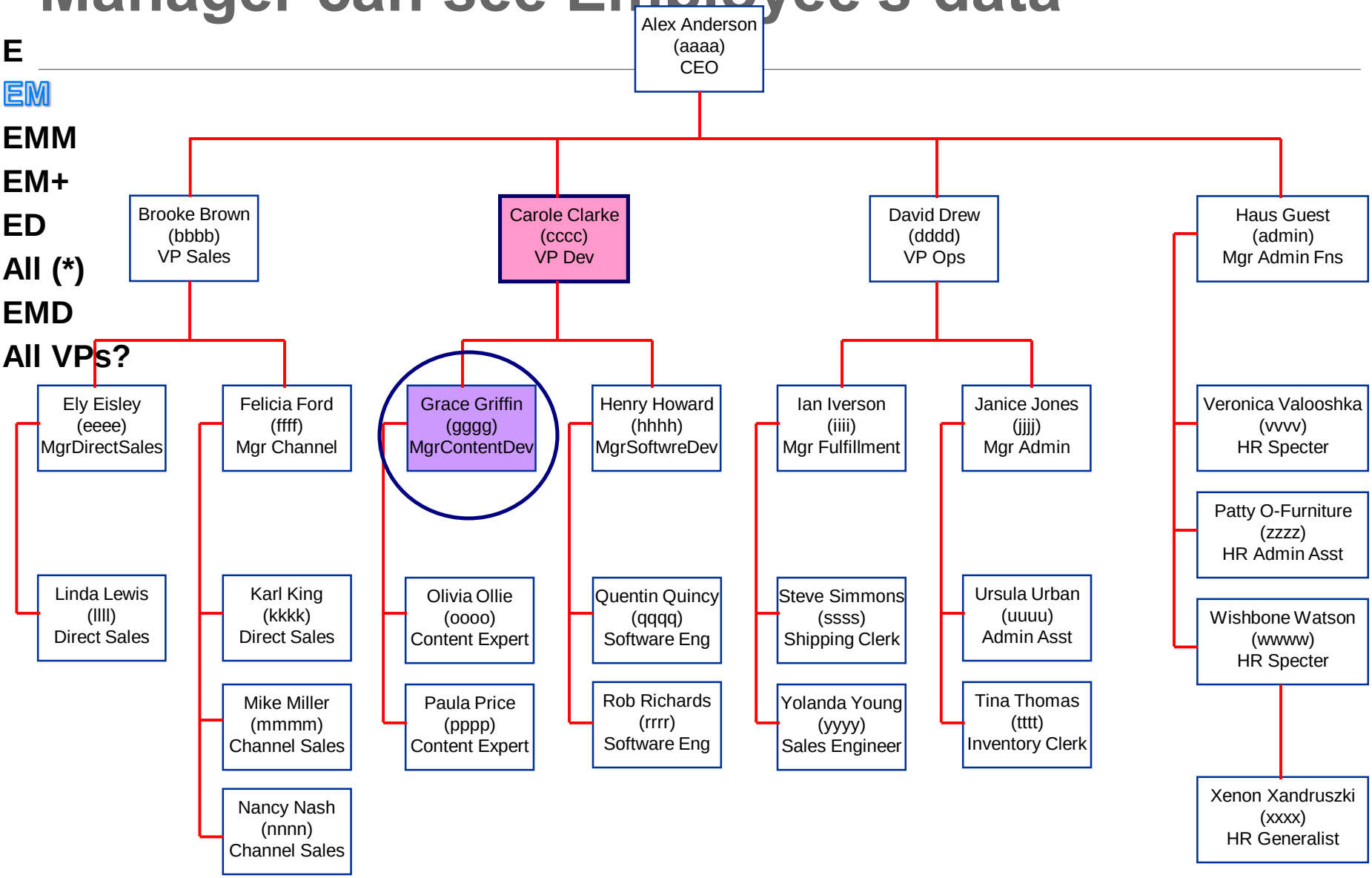
EM+

ED

All (*)

EMD

All VPs?



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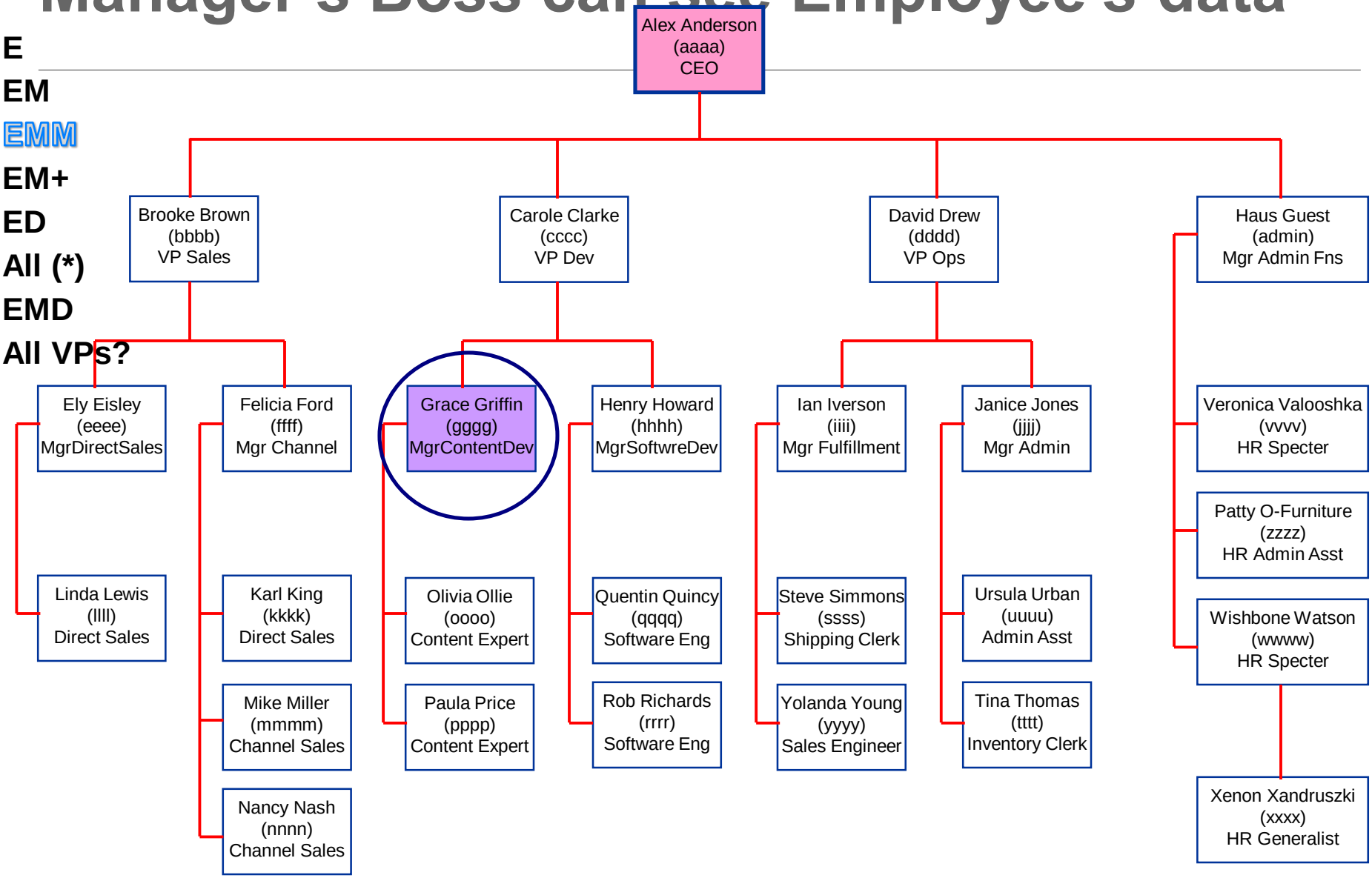
Manager's Boss can see Employee's data

E
EM
EMM
EM+
ED
All (*)
EMD
All VPs?



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“Managers Up” can see Employee’s data

E

EM

EMM

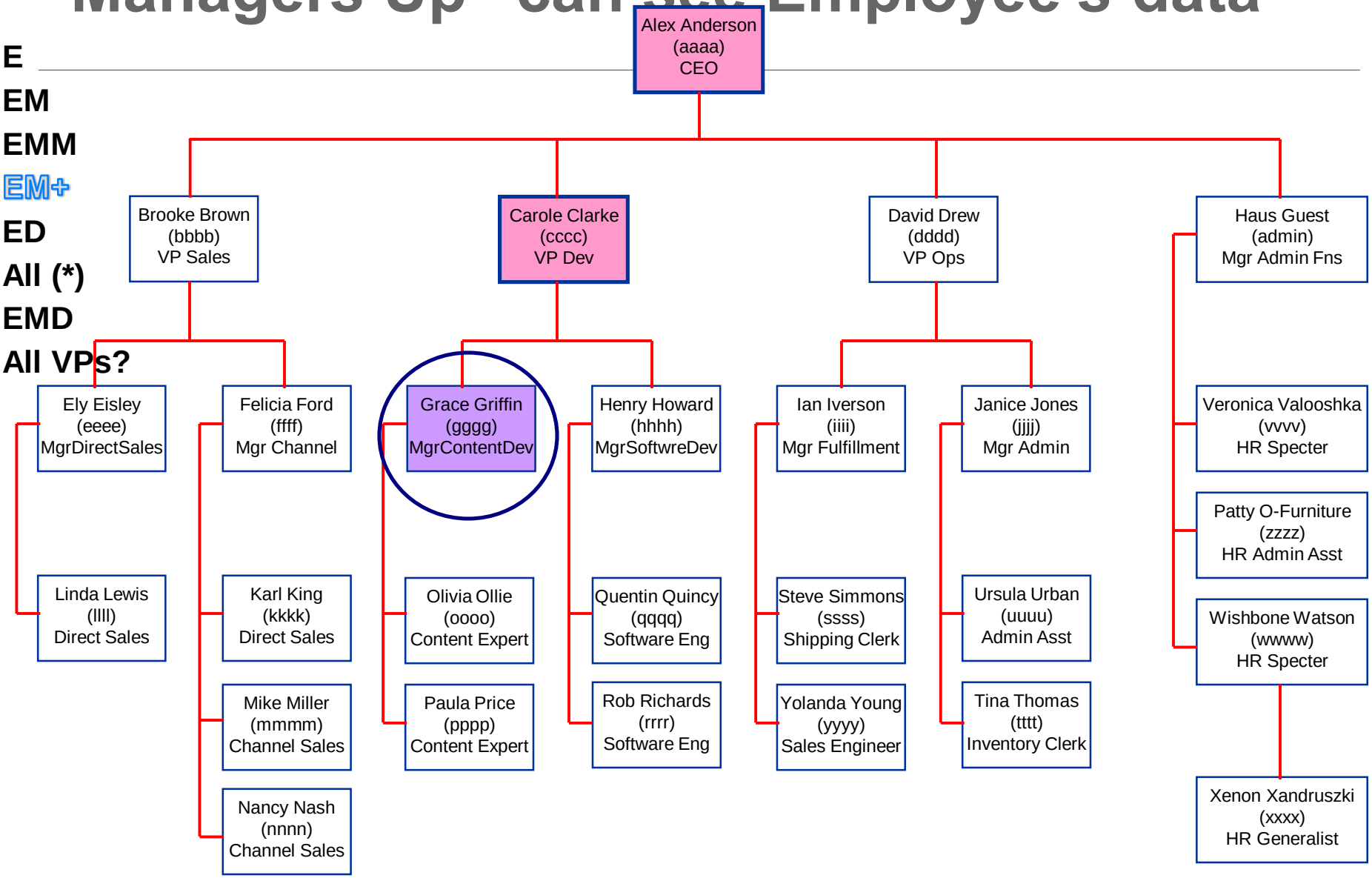
EM+

ED

All (*)

EMD

All VPs?



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Direct Reports can see Employee's data

E

EM

EMM

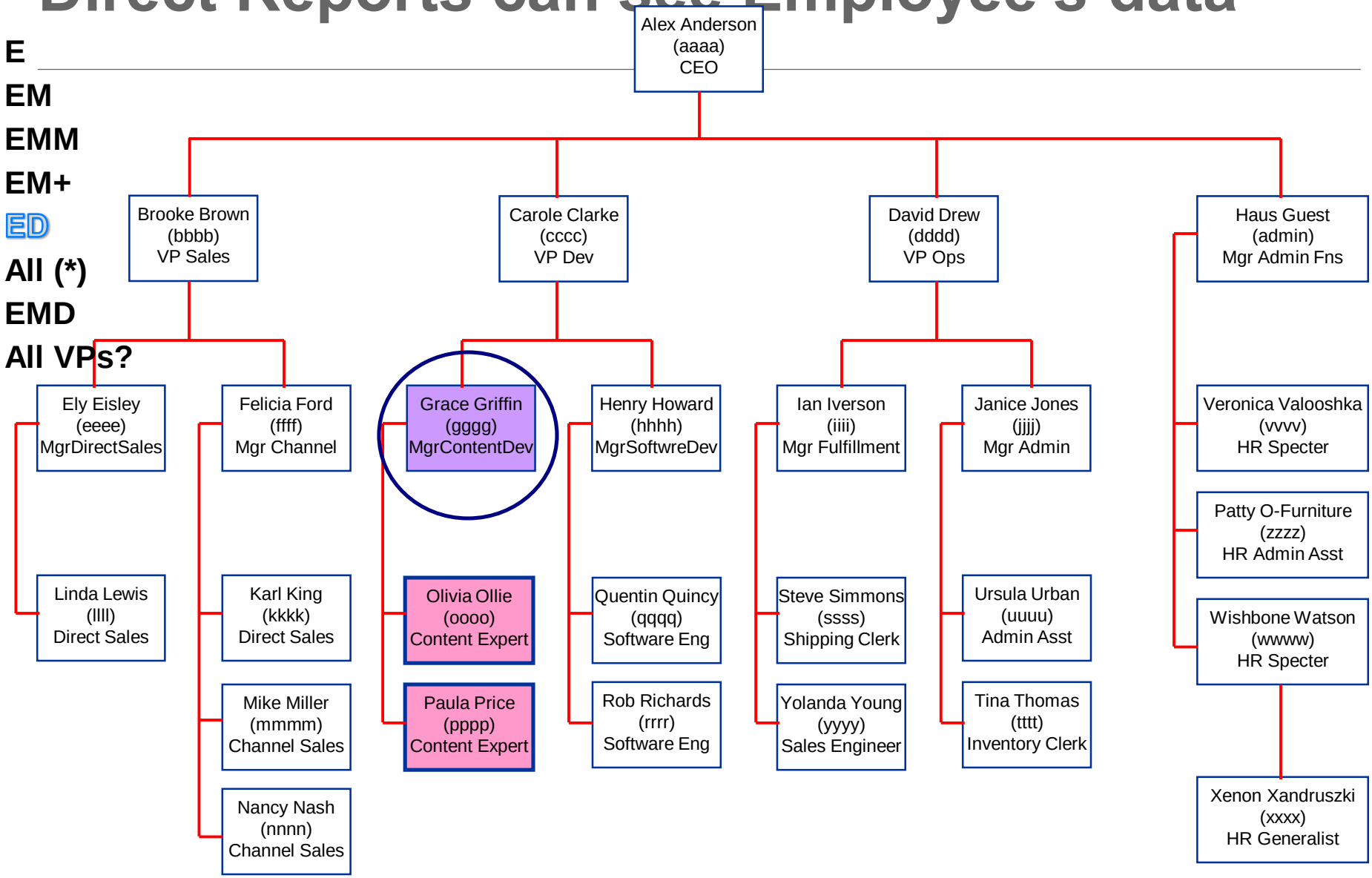
EM+

ED

All (*)

EMD

All VPs?



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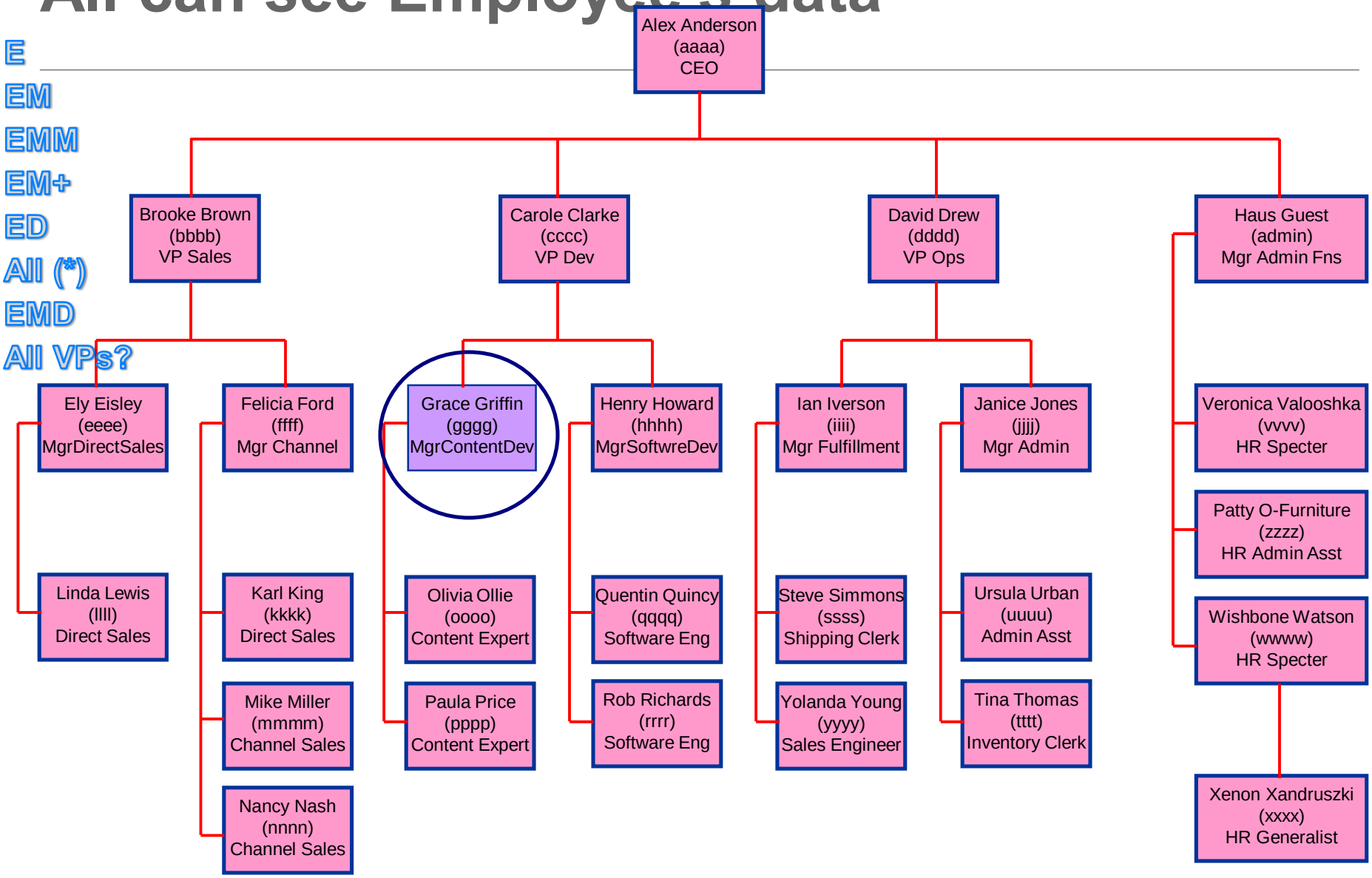
All can see Employee's data

E
EM
EMM
EM+
ED
All (*)
EMD
All VPs?



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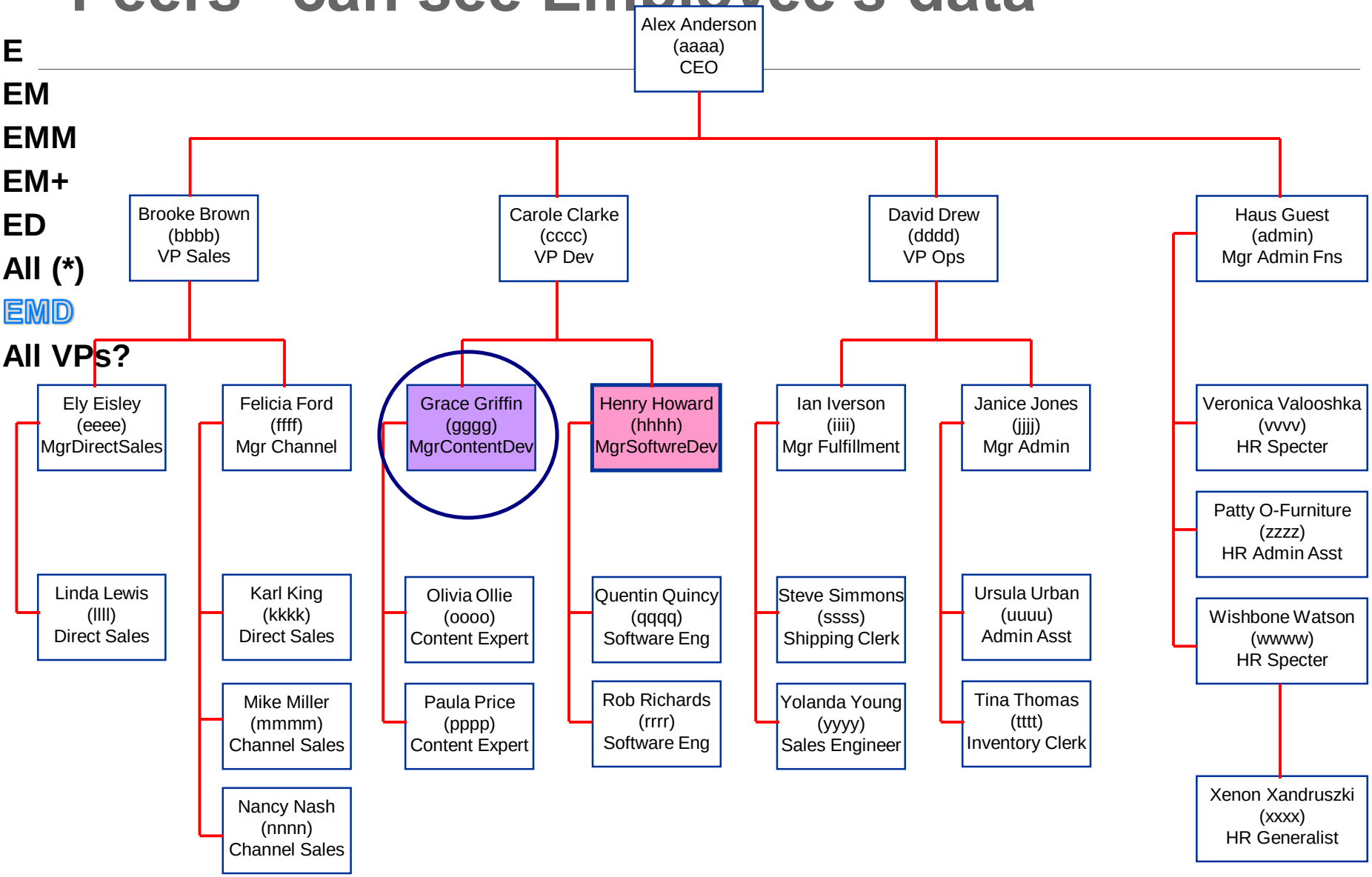
“Peers” can see Employee’s data

E
EM
EMM
EM+
ED
All (*)
EMD
All VPs?



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