



**iXerv**

SAP SuccessFactors Delivered

# COVID-19 Crisis: Using SAP SuccessFactors To Track Employee Health Quickly and Easily

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**SAP® Recognized Expertise**

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# Today's Agenda

1. Welcome and Brief Overview
2. Extension Center
3. Other System Components
4. Reporting
5. Implementation Steps
6. Demo
7. Questions and Answers

# Welcome and Brief Overview

- This session is intended to show you an overview of the Extension that iXerv has created to capture employee health check-in data during the COVID-19 crisis
- The extension deployment instructions are offered to you free of charge
- The work involved in implementing this extension will be low, so you can quickly start gathering vital information on your employees and their health situation
- The extension can be customized after implementation to best fit your needs

# Data Privacy and Legal Considerations

- The information being captured in this extension is still subject to all of the normal Data Privacy restrictions within the countries that your employees reside
- Please consult with your Chief Privacy Officer or Legal Counsel before deploying this extension
- Additional resources will be included in the Instructions documentation, but these do not replace any existing data privacy policies that your company may have established
- The extension may be modified to remove any data that might be considered confidential or that conflicts with your existing data privacy policy

# Extension Center

- Extension Center – You will need to have the extension center enabled in your instance in order to use the tools mentioned above

## Extension Center

Create SuccessFactors Extension

Extension Center is a one-stop page for creating and managing custom elements in SAP SuccessFactors. From here, you can create entirely new elements as well as edit existing ones to meet whatever your business needs may be.

SuccessFactors Extensions (2)

<p>COVID-19 Health Re... </p> <p>Last modified: Mar 25, 2020 by <a href="#">adminla</a></p> <p><b>2</b> Objects</p> <p>No Rules</p> <p><b>1</b> Workflows</p> <p><b>1</b> UIs</p>	<p>Uncategorized </p> <p>Last modified: Jun 28, 2019 by <a href="#">adminix</a></p> <p><b>12</b> Objects</p> <p><b>1</b> Rules</p> <p>No Workflows</p> <p><b>2</b> UIs</p>
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# Extension Center - continued

Extension Detail

Icon & Title \* External Code Status

COVID-19 Health Reporting COVID19\_HEALTH\_RPTING Unpublished

Description

Daily health reporting during COVID-19 pandemic extension

2 2

Object(s) Picklist(s)

---

2 Object(s) + Add New Object + Add Existing Object

**COVID-19 Check-In Rec...**

Mar 25, 2020

0 1 1

Description

Container for all health check-in records

**Health Check-In Data**

Mar 25, 2020

Child of: COVID-19 Check-In Record

0 0 0

Description



Fields to capture daily Check-In values

- The extension consists of several parts, 2 objects and 2 picklists
- One object has all of the detail records for each check-in record
- The other object is the “container” for the detailed records for each employee


# Extension Center - continued

Object Detail

Label <sup>?</sup> \* Code <sup>?</sup>

Health Check-In Data  cust\_COVID19\_HEALTH\_ITEM 

Description <sup>?</sup>

Fields to capture daily Check-In values 

Last modified on Mar 25, 2020 by adminla.

Fields Show all fields  NO

Relationships

Rules

Workflows







UIs

Properties

Security

DPP

This is where you adjust the fields within your object. Fields can be standard, with no special characteristics, or they can be searchable.



Label	* Name <sup>?</sup>	* Data Type <sup>?</sup>	* Visibility <sup>?</sup>	Required	
externalCode 	externalCode	Aut... <input type="text"/>	Rea... <input type="text"/>	<input checked="" type="radio"/> YES <input type="radio"/> NO	
externalName 	externalName	String <input type="text"/>	Edit... <input type="text"/>	<input type="radio"/> YES <input checked="" type="radio"/> NO	
Date 	cust_date	Date <input type="text"/>	Edit... <input type="text"/>	<input checked="" type="radio"/> YES <input type="radio"/> NO	

- This shows the detailed record fields, which can be updated either inside of the extension record or within the Admin Center>Configure Object Definition area


# Extension Center - continued

Extension Detail

Icon & Title \* External Code Status


 COVID-19 Health Reporting  COVID19\_HEALTH\_RPTING Unpublis


Description

Daily health reporting during COVID-19 pandemic extension 

2 Object(s) 2 Picklist(s)

---


 2 Picklist(s) + Add New Picklist + Add Existing Picklist ▼ Filters

COVID\_HEA... 

Mar 25, 2020

4

Value(s)

yesNo 

Aug 25, 2018

2

Value(s)

- The extension center also allows you to create or reuse picklists
- The majority of fields in this extension are using the standard “yesNo” picklist
- We’ve created a custom picklist for COVID\_HEALTH\_STATUS, which can be updated once installed in your instance



# Extension Center - continued

Workflow Open Workflow Engine Remove Workflow

Workflow: Health Check-In Report (COVID\_HEALTH\_WKF)

\* Workflow ID: COVID\_HEALTH\_WKF

Name: Health Check-In Report

Description: Triggered when an employee submits a check-in report

Remind In Days: 1

Is Delegate Supported: No

Alternate Workflow: No Selection

Redirect CC Users To Workflow Approval Page: No

Step 1

* Approver Type	* Approver Role	Context	Edit Transaction	No Approver Behavior	Relationship to Ap
Role	Manager	Source	No Edit	Skip this Step	Employee

Step 2

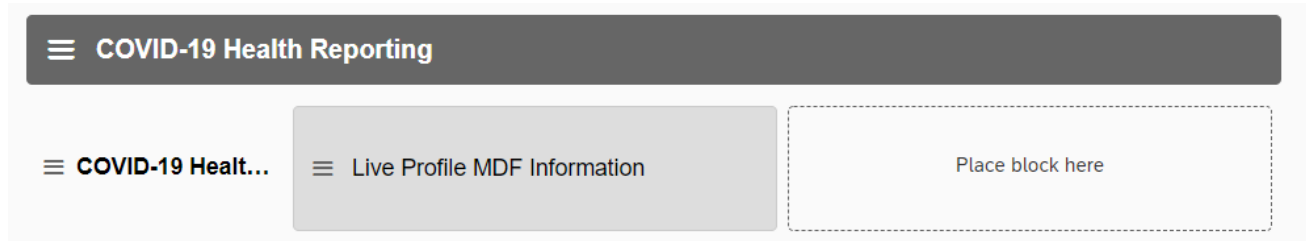
* Approver Type	* Approver Role	Context	Edit Transaction	No Approver Behavior	Relationship to Ap
No Selection					

- The extension center also allows you to create a workflow and attach it to detail object
- You can choose to use the one that will be installed with the extension or you can choose to remove it after implementation
- Other considerations are who should be able to see the submitted data and how you expect to incorporate it into your existing Role-based Permission framework

# Other System Components

- In addition to the Extension Center, this extension uses the following portions of the system
  - People Profile
  - Home Page
  - Role-based Permissions

# Other System Components: People Profile



- Once the extension is installed, you will need to create a section in your People Profile to house the information
- If you are not using People Profile (PP3), you can add it to your v12 profile as well

# Other System Components: Home Page

The screenshot shows the SAP SuccessFactors Home Page. At the top, there is a navigation bar with a home icon and the text "Home". Below this, there is a "News" section. The main content area features a large custom tile titled "COVID-19 Health Check-In". The tile has a blue background with a white border and a red heart icon with a white ECG line. Below the tile, there is a purple bar with the text "Edit Custom Tile".

1. General

\*Title Name: COVID-19 Health Check-In

Description: Link to profile block to capture health reports

2. Tile

Type: Graphical

Title: COVID-19 Health Check-In

Subtitle:

Preview

The preview shows the tile with the red heart icon and the text "COVID-19 Health Check-In" on a blue background.

- The easiest way to allow your employees to access the health check-in portion of the new extension is to create a custom tile and place it on your home page
- The process of creating a custom tile usually takes less than 15 minutes
- Putting it in a prominent location on your home page is recommended
- Instructions to create the tile and insert it into the People Profile in your system are included in materials we will make available

# Other System Components: Role-based Permissions

Security

Security allows user to restrict the object from certain groups or users, security can be added at both object level and field level.

\* Secured ⓘ

Yes ▾

Permission Category ⓘ

Miscellaneous Permissions ▾

RBP Subject User Field ⓘ

externalCode

CREATE Respects Target Criteria ⓘ

NO

Base Date Field For Blocking ⓘ

mdfSystemEffectiveEndDate

- The extension is built on the MDF framework and, by default, the objects are secured
- You can choose not to secure them or to add them to the Miscellaneous Permissions category in the targeted roles
- The targeted roles would be the Employee Self-Service (ESS) role and any other roles that should have access to the data
- This will depend on the use of a workflow and reporting requirements

# Reporting

- You have several options available to report on the data collected by this extension
- If you are an Employee Central client, you can use the Report – Canvas report in the Report Center. You may need to refresh the Metadata source or submit a support ticket to have it done for you, depending on the back-end configuration in your system
- If you are not using Employee Central, you can still export the data from the system or you can create a simple Integration within the Integration Center
- Additional information on these options will be included in the Instructions on how to install and use the extension

# Implementation Steps

1. The implementation steps will be listed in order on the Instructions
2. These steps are sequential, so please plan accordingly
3. You may need to enable the following functionality via the Upgrade Center:
  - Extension Center
  - Integration Center
4. In addition to these items, your RBP role will need permission to manage the Home Page and Configure the People Profile
5. Finally, you will need to update the RBP roles that will be using this extension.
6. A full video demonstration of these steps is available for your reference and the link will be provided to you

# More Information and Downloading the Instructions

- Go to [www.ixerv.com/covid-19](http://www.ixerv.com/covid-19) to access:
  - Additional information
  - Step-by-step implementation document





# Demo

# Demo

- A demo is available at <https://www.youtube.com/watch?v=n0zd6RcHD3g>

The screenshot shows a web browser displaying a SAP SuccessFactors interface. Two pop-up windows are visible over the main content area.

The left window is titled "Change History" and contains a list of questions with "Yes" or "No" responses:

- Are you over 18 days? No
- Have you been in contact with someone that has been diagnosed with coronavirus in the last 14 days? No
- Do you have any ongoing personal travel plans? No
- Are you currently wearing face masks? Yes
- Have you seen any colleagues show symptoms of coronavirus? Yes
- Have you had another work partner in the last 14 days? No
- Do you attend all of the mandatory 14 days of company self-isolation? Yes

At the bottom of this window, it says "April 2020" and "Start New Project".

The right window is titled "COVID-19 Check-in Record: Changes" and shows a "Health Check-in Table" for "Apr 21, 2020".

Item	Apr 21, 2020
Current Health Status	Healthy
Have you been in a heavily populated area in the last 14 days?	No
Have you been in contact with someone that has been diagnosed with coronavirus in the last 14 days?	No
Do you have any ongoing personal travel plans?	No
Are you currently wearing face masks?	Yes
Have you seen any colleagues show symptoms of coronavirus?	No
Have you had another work partner in the last 14 days?	No
Do you attend all of the mandatory 14 days of company self-isolation?	Yes

# Questions & Answers

# Questions & Answers

- Do you have to have Employee Central enabled to use this tool?
  - This tool can be deployed through the Extension Center without the need for Employee Central.
- Is there a cost to the extension? Can a customer deploy it without incurring a fee?
  - The solution is free of charge and does NOT require providing contact information or anything of that nature. There are no strings attached.
- So, if you have LMS or GM/PM and access to Bizx you can access Ext Center and access this app. Correct?
  - Correct. If not enabled, the Extension Center is enabled using the Upgrade Center

# Questions & Answers

- Does iXerv have a quick set up pkg to do this for a client? if so, what are the costs?
  - We didn't define a service yet as we don't want to burden customers with additional cost, but it's definitely something we can do for a customer if needed and we could do it for a nominal fee to keep costs down. Our focus is to give customers something useful for free.
- The extension can be used in a talent hybrid scenario, ie. HCM core on premise, in SF just people profile?
  - Yes it can. It does not require Employee Central.
- Isn't the idea that we can make this look the way we want? It doesn't have to look exactly like this, right?
  - That is correct. You can configure the solution to meet your requirements.

# Questions & Answers

- Can we use rules to determine what questions goes to a particular population?
  - Yes, user interface rules can be used to determine which fields show for which populations.
- Is this reportable?
  - Yes, you can use Report Center to report on the data. This is an important aspect of using the Extension.
- Does the guide include the specific questions you have in the prototype?
  - Yes, what we showed in the demo is what the instructions will produce.
- What is the best way for me to share details with customers who are not attending
  - You can share the link <http://www.iXerv.com/covid-19> with customers


# Questions & Answers

- In the US, we need to track 2 types leaves taken by our employees. Can this be added as part this solution?
  - Yes it can
- Any event/event reason tied to these entries?
  - No there are not. Events and Event Reasons are part of Employee Central and this Extension has been built so that it can be used without Employee Central.

# Contact Us:

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