Sage People

Checks to carry out when a System Administrator leaves

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Template Version Control

Version #	Author(s)	Description	Date
1.0	Customer Success	Initial version	12/06/2023

Document Version Control

Version #	Author(s)	Date	Reviewed by	Review date	Approved by	Approved date
1.1.		14/06/2023	CoE	14/06/2023	CoE	14/06/2023

What to be aware of when a System Administrator leaves

What changes need to be made to my org?

When a System Administrator leaves your organisation, you should check and update (where applicable) the following areas (this list is not exhaustive and depending on your setup and how the product evolves over time, this could mean that additional checks are required):

- Create a new System Administrator (if applicable)
- Scheduled Jobs
- Scheduled Reports
- Reporting Snapshots
- Dashboards
- Workflow Actions
  - Email Alerts
  - Field Updates
  - Tasks
- Workflow Rules
- Approval Processes
- Validation Rules
- Process Builder and Flows
- Scheduled Payflows
- Main Company Contact
- Deactivate the leaving System Administrator User record
- Error message examples

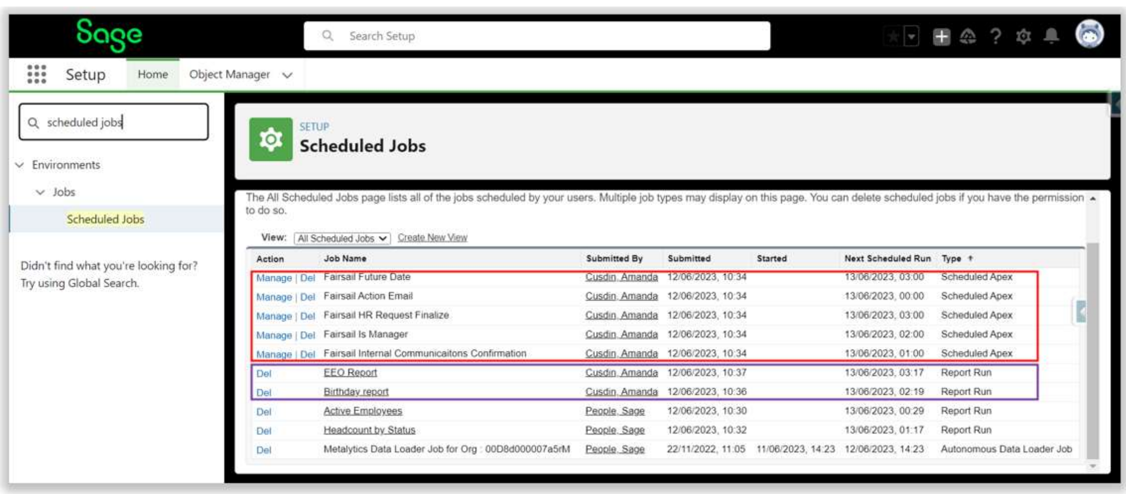
Configuration Checks

Create a new System Administrator User

Create a new System Administrator User (if one does not already exist) so that you have a new user record to transfer tasks over to; you may need to temporarily 'freeze' an active Salesforce licence user if you do not have a spare Salesforce license. Once you have completed all required checks, you can deactivate the leaving System Administrator user record and reactivate the 'frozen' Salesforce licence user.

Scheduled Jobs

To check to see if the leaving System Administrator has any scheduled jobs running assigned to their user record, go to **Setup** > **Scheduled Jobs**; for the purpose of this example Amanda Cusdin is the System Administrator who is leaving the organisation.

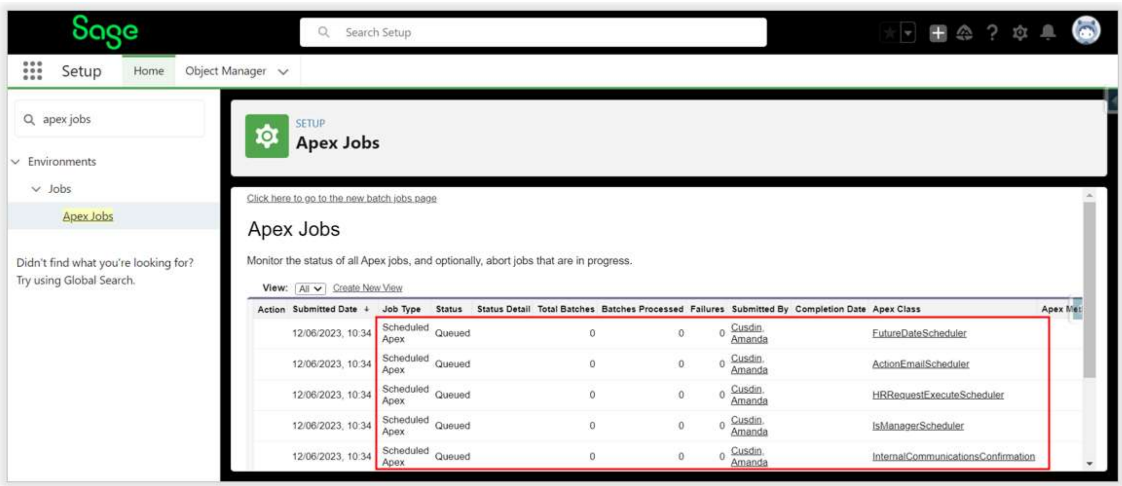


Amanda Cusdin has both scheduled jobs (Apex Jobs) and scheduled reports assigned to her user record so all jobs and reports showing as **Submitted By: Cusdin, Amanda** will need to be assigned to a new System Administrator user record.

Note: Scheduled Payflows also show as **Scheduled Apex** jobs; these will need to be re-scheduled to a new System Administrator user record – refer to the Scheduled Payflows section in this guide for more information.

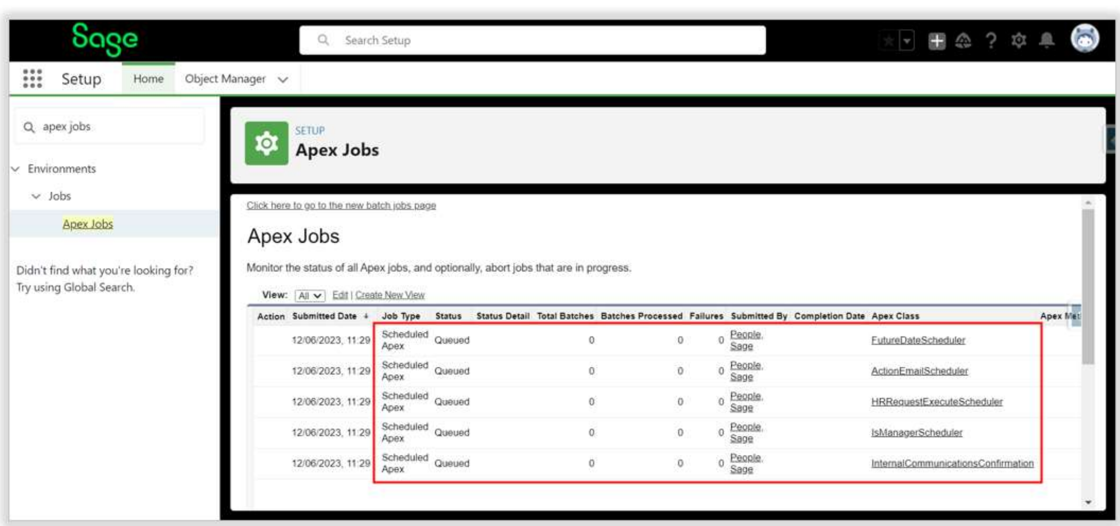
To re-assign the Apex job(s) to a new System Administrator record i.e. to the System Administrator who is carrying out these checks (yourself), you will need to *change the batch running time in the **Sage People – Human Capital Management Install Package** for each of the batches that are currently assigned to the leaving System Administrator user record – once saved, the **Submitted By** column will update to show your name; there are 2 areas in **Setup** that displays this information, **Scheduled Jobs** (as shown in the example above) and **Apex Jobs** (shown below).

Note: Spread out the batch running times so that start times do not clash/overlap as this could cause batches to fail.



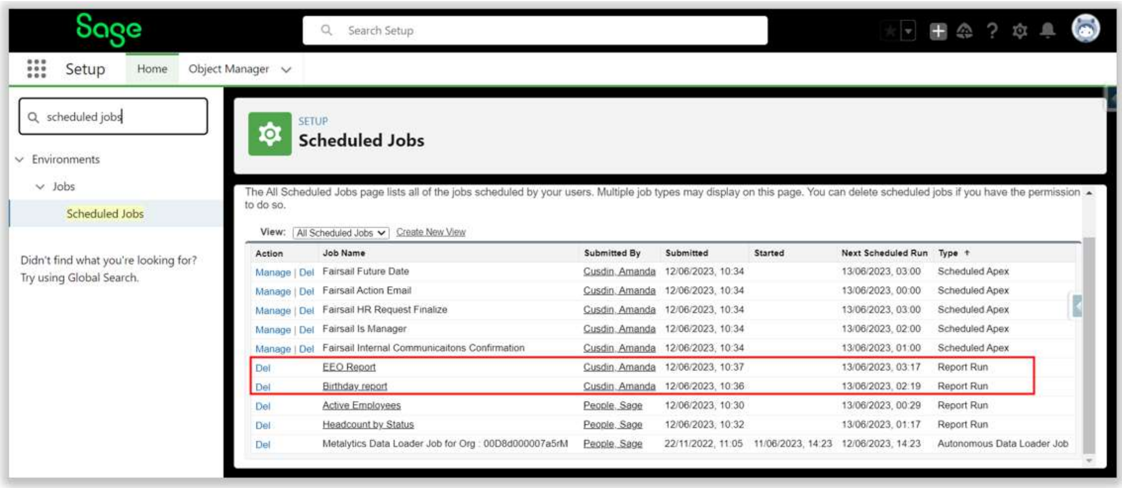
For this example, all batches currently assigned to Amanda Cusdin will be updated to show the *Sage People Support user as the new System Administrator user record. Go to **Setup** > **Installed Packages** > scroll to the **Sage People – Human Capital Management** Package and click **Configure** > choose the required batch time for each batch that requires a new batch owner > **Save**. The **Submitted By** column has been updated to reflect the new batch owner.

*Note: If you use the Sage People Support user as the assigned owner for all Apex Job batches, you will never have to do this check again as this user record will never be deactivated. If you want to assign this user as the Apex Job batch owner, please raise a case with Sage People Support.



Scheduled Reports

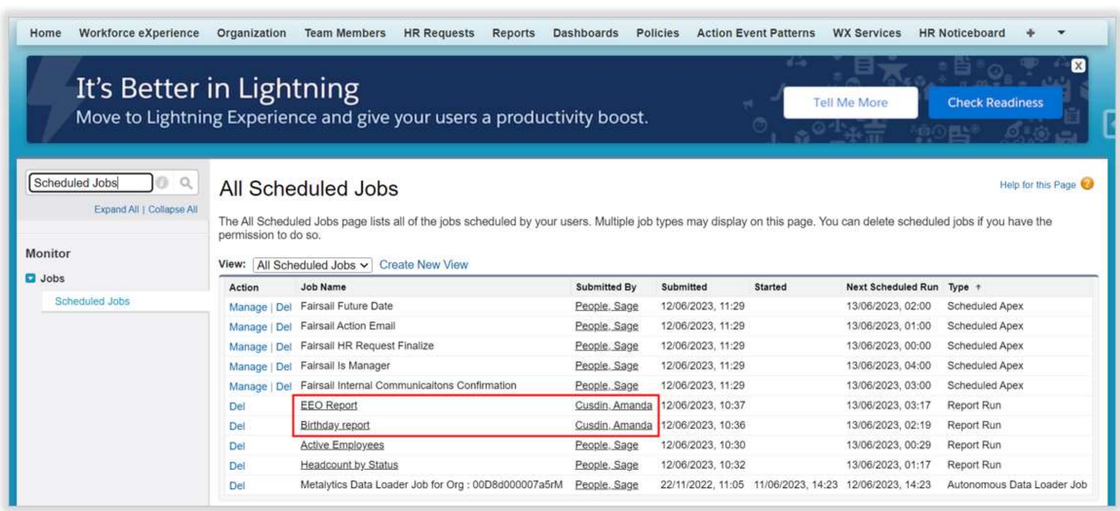
Amanda Cusdin has scheduled reports assigned to her user record so all reports showing as **Submitted By: Cusdin, Amanda** will need to be assigned to a new System Administrator user record.



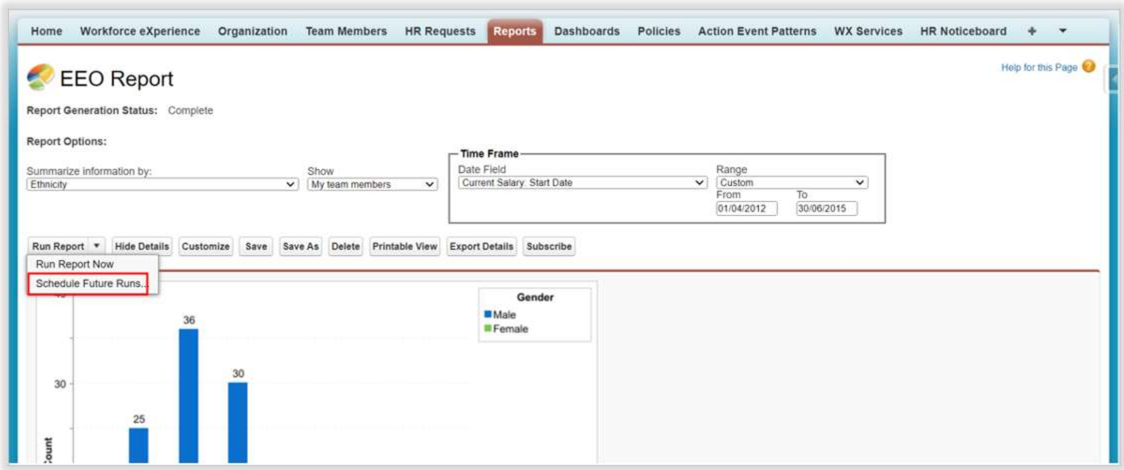
When a user that has created a scheduled report(s) to run leaves the business, it means that you need to change the 'Running User' for each of the scheduled reports that they have set up. We recommend that all scheduled reports are set up using the Sage People Support user as the 'Running User' as this user record will never be deactivated.

To change the 'Running User' and the 'Submitted By' name, first you have to unschedule the report and then re-schedule it with the new 'Running User' – you will need to make a note of the report schedule setup i.e. users it is going to, frequency and time before you click unschedule so you can add these back in on the new schedule (repeat the process for each report that needs to be updated).

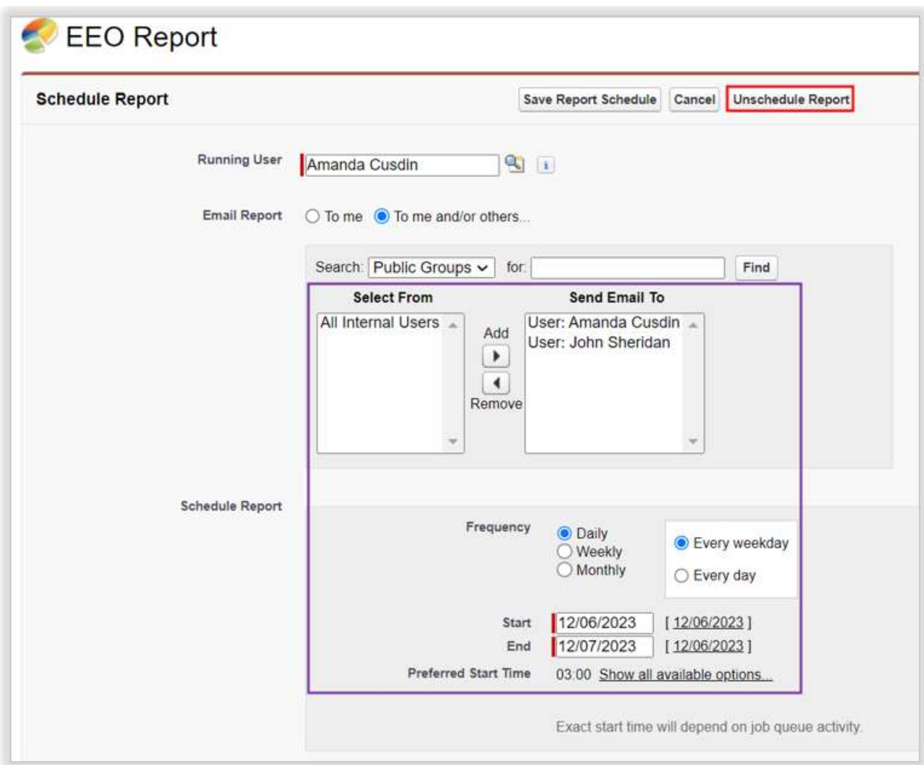
Switch to **Salesforce Classic** view > go to **Setup** > search for **Scheduled Jobs** > click on the report Job Name link you want to update:



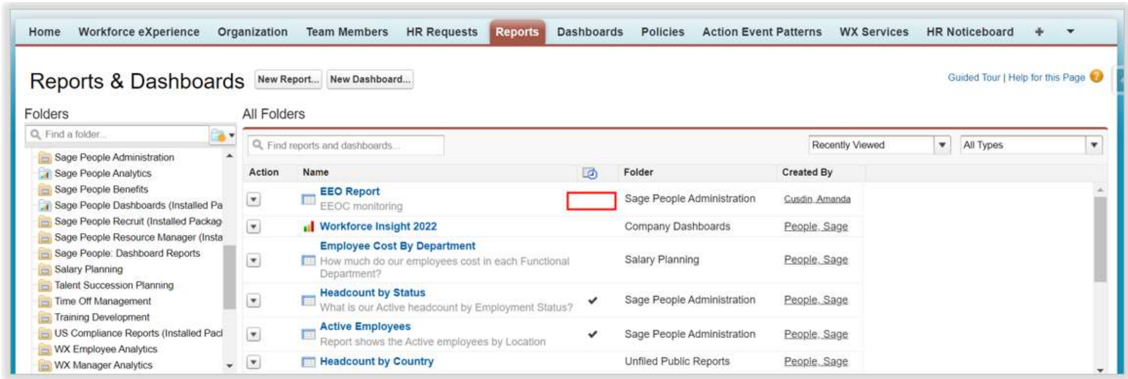
Click on the dropdown arrow to the right of **Run Report** and select **Schedule Future Runs**.



Make a note of who the report is sent to, frequency and timing etc. > click **Unschedule Report** > click **OK**.

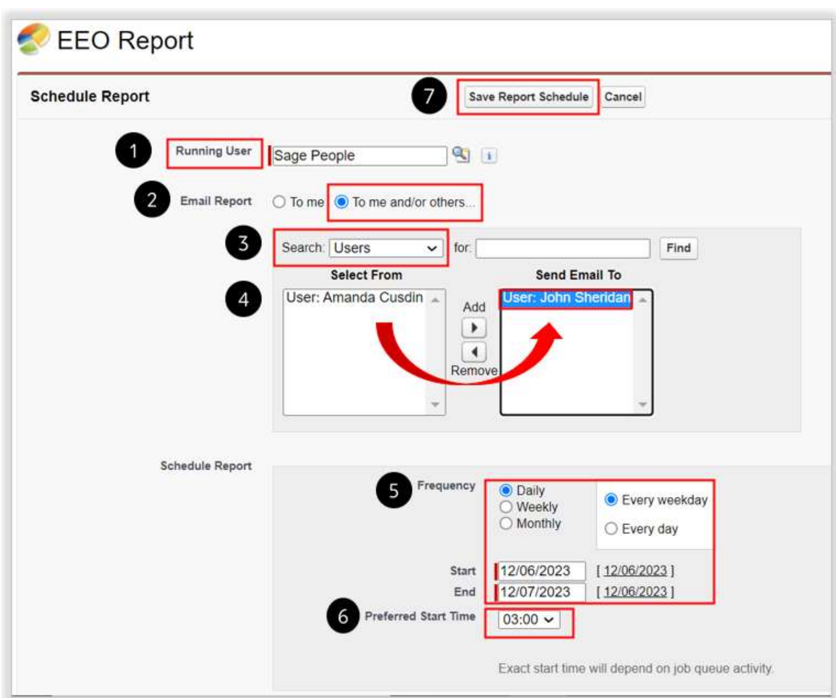


The screen will take you back to this view; you will notice the schedule ‘tick’ has disappeared from the EEO Report:

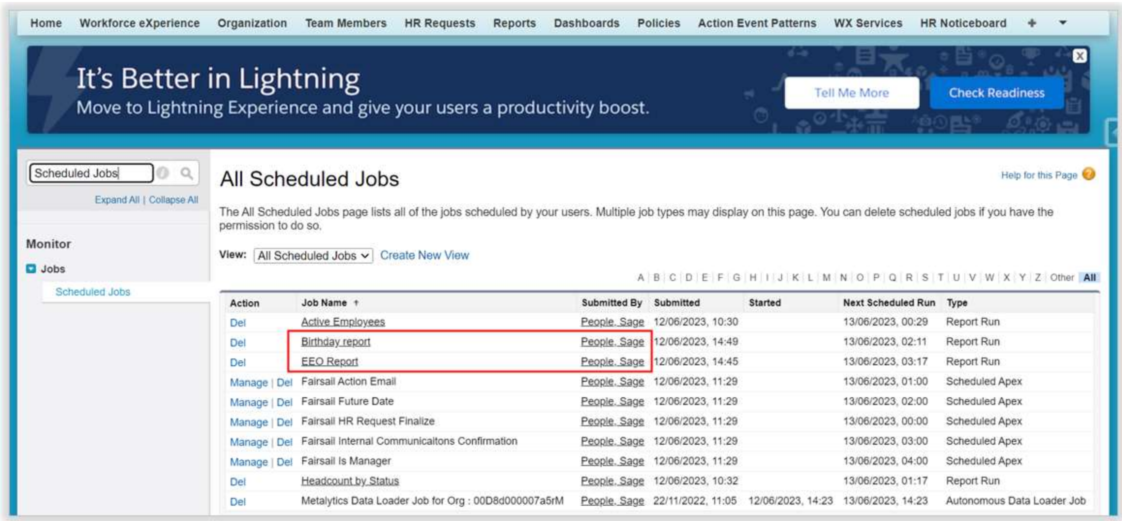


To re-schedule the report (this example explains how to schedule the report to others), click on the Report Name link i.e. in this example ‘EEO Report’ > click on the dropdown arrow to the right of **Run Report** and select **Schedule Future Runs**

1. Change the **Running User** to the Sage People Support user, for the purpose of this example, this is called **Sage Support**
2. In the **Email Report** section: select **To me and/or others…**
3. In the **Search** section: select **Users**
4. Click on the Sage People Support user in the **Send Email To** section and click **Remove** > click on the name of the user(s) you want to send the report to from the list in the **Select From** section and click **Add**; they will now appear in the **Send Email To** section
5. Choose the **Frequency**
6. Choose the **Preferred Start Time**
7. Click **Save Report Schedule**. Repeat the process (if applicable)

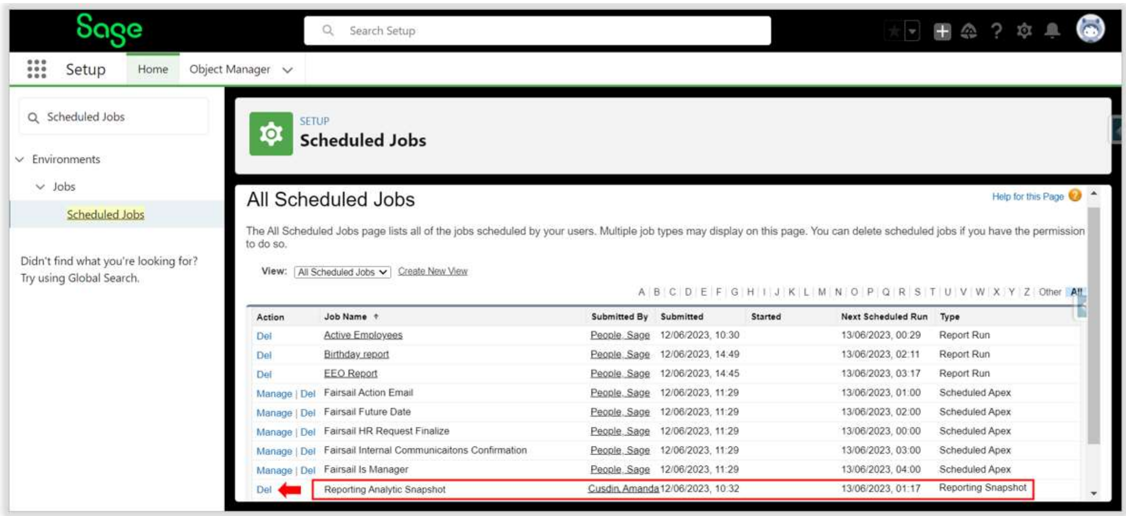


If you go back to **Setup** > **Scheduled Jobs**, you will now see the reports will be submitted by the Sage People Support user.

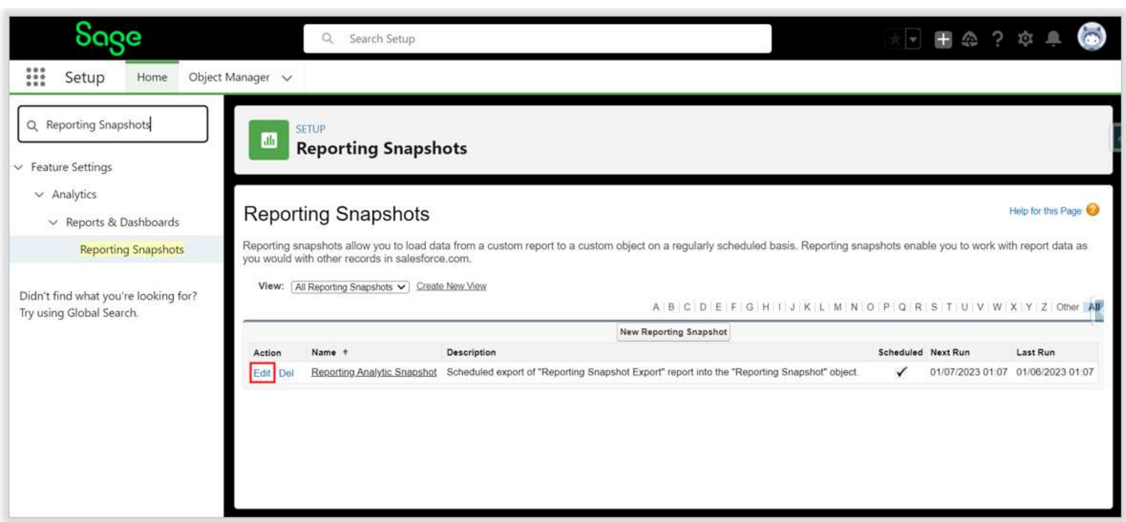


Reporting Snapshots

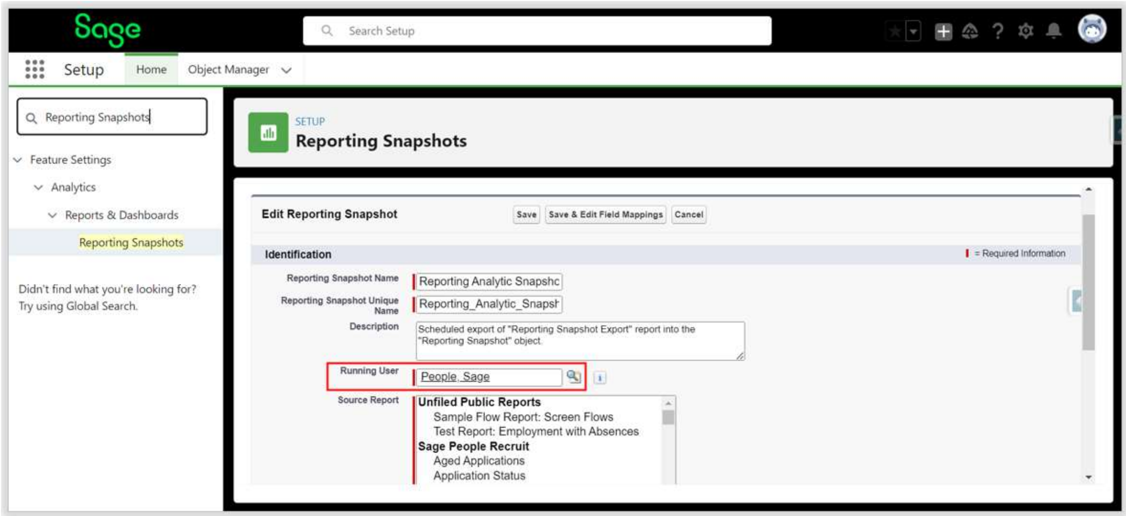
Amanda Cusdin is set up as the ‘Running User’ of the **Reporting Analytic Snapshot** report. To change the ‘Running User’, first you need to delete the report from the **Scheduled Job** screen, click **Del**.



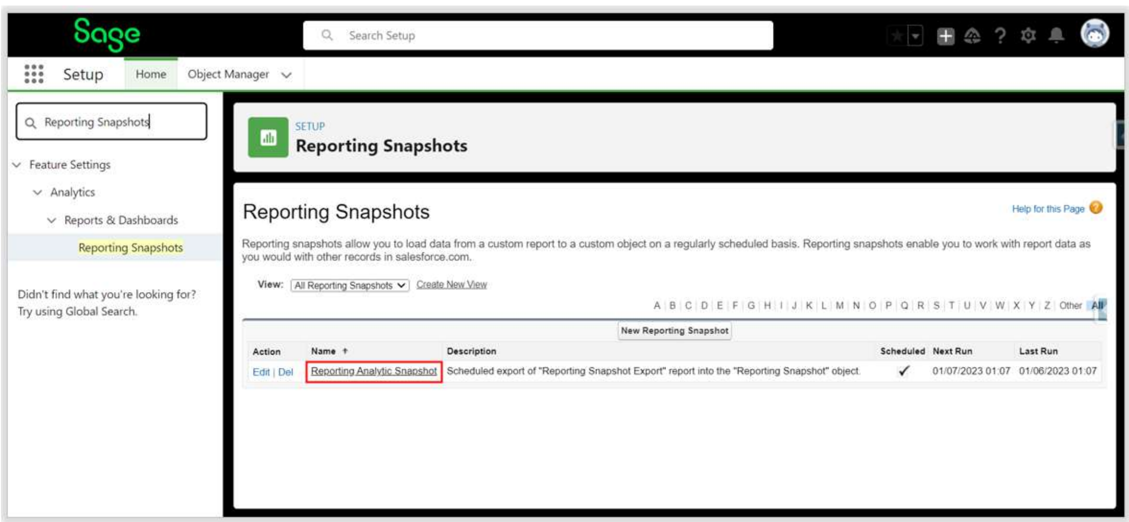
To re-schedule the report to the new ‘Running User’, go to **Setup** > **Reporting Snapshots** > click **Edit** for the report you want to change e.g. Reporting Analytic Snapshot.



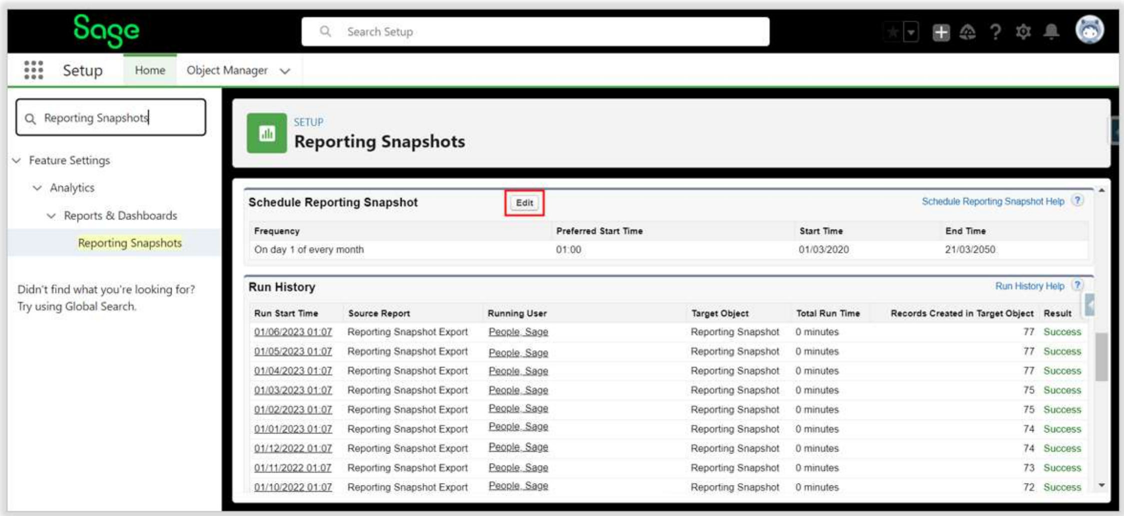
In the **Running User** field, click on the magnifying glass icon and search for the Sage People Support user e.g. for this example **People, Sage** > select this user > click **Save**.



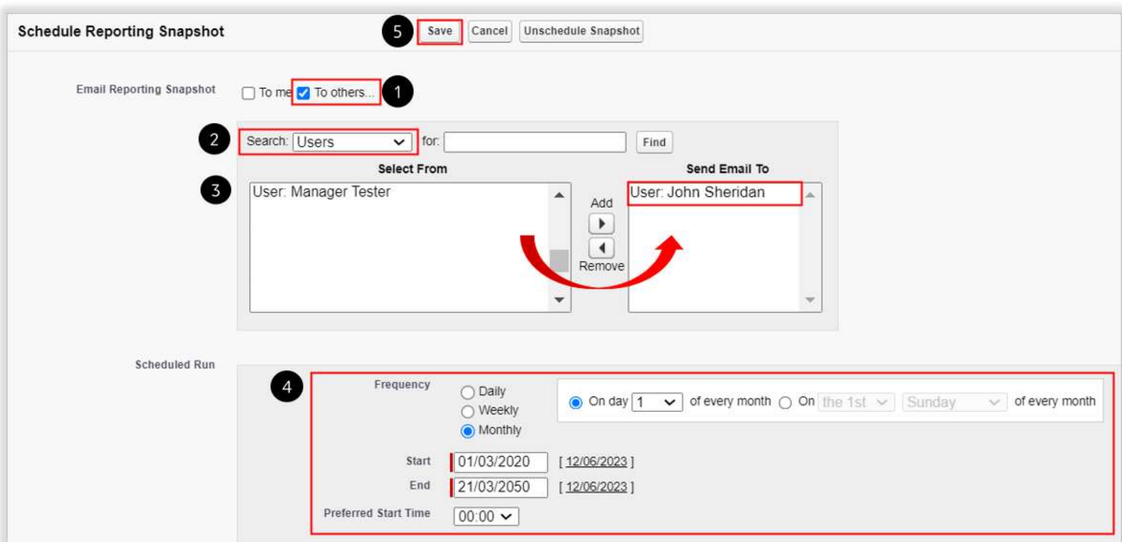
To re-schedule the report to send to users (if applicable – we recommend that the report is sent to at least one user so that you know the report is running successfully), click on the **Name** of the report link e.g. Reporting Analytic Snapshot.



Scroll down to the **Schedule Reporting Snapshot** section > click **Edit**.



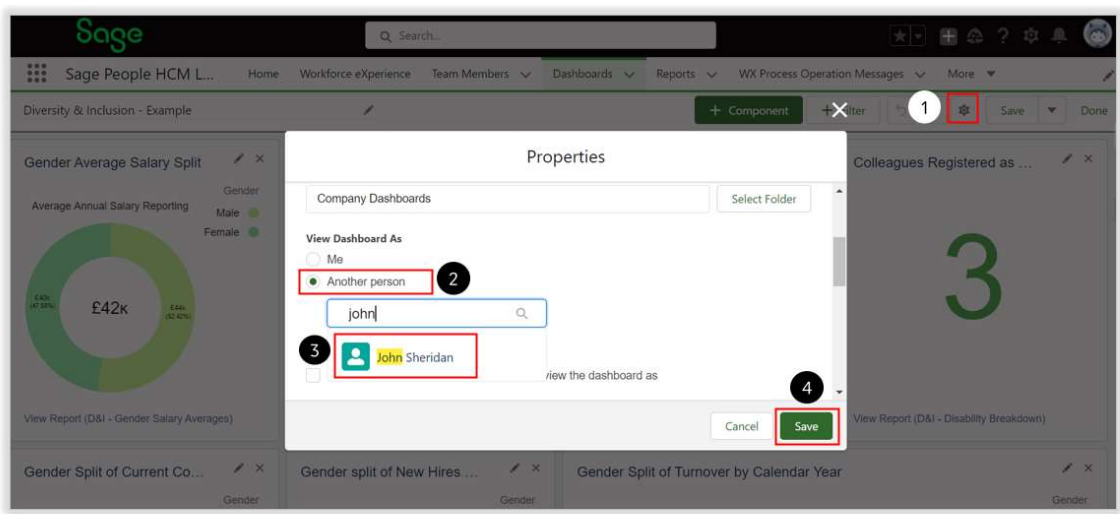
In the **Email Reporting Snapshot** section: select **To others...** > in the **Search** section: select **Users** > click on the name of the user(s) you want to send the report to from the list in the **Select From** section and click **Add**; they will now appear in the **Send Email To** section > choose the **Frequency** and **Preferred Start Time** > click **Save**.



Dashboards

From the App Launcher, type in **Dashboards** and select **All Dashboards**. To find all Dashboards that have been created by the leaving System Administrator, click on the **Created By** column header to group the Dashboards by name. For every Dashboard created by the System Administrator, you need to go into the Dashboard **Properties** and change any that are set to run as the leaving System Administrator user and change to another user.

Click on the Dashboard Name link > click **Edit** > click the **Edit Dashboard Properties** 'cog' > in the **View Dashboard As** section, select **Another Person** > start typing in the name of the new user in the **Search** field, select the user > click **Save**.



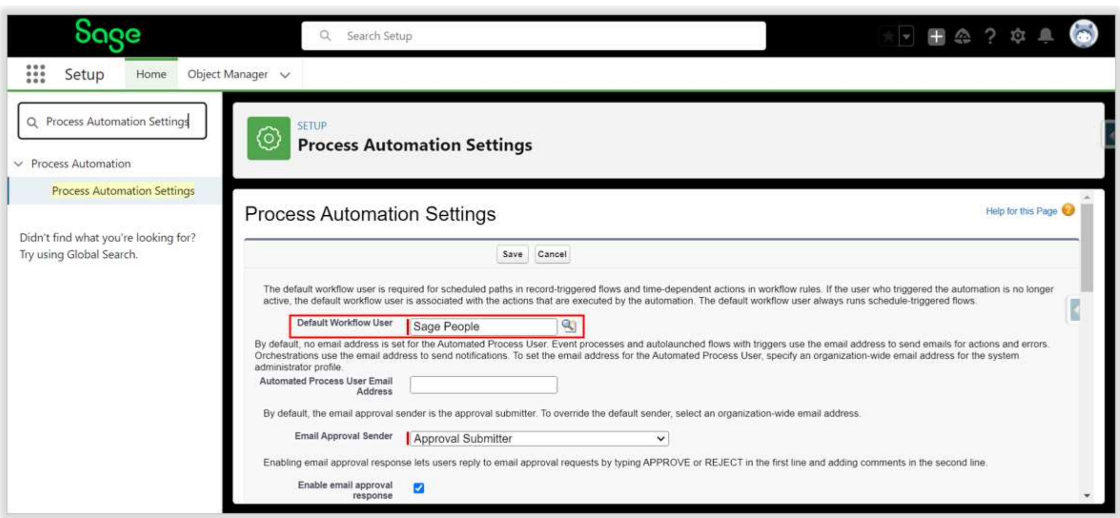
Workflow Actions

Workflow automates the following types of actions based on your company processes and contain many settings where the name of a user can be hard coded; you will need to check all action types and if there are any references to the leaving System Administrator, they need to be changed:

- Email Alerts: Send an email to one or more recipients you specify
- Field Updates: Update the value of a field on a record
- Outbound Messages: Send a secure, configurable API message (in XML format) to a designated listener e.g. external Finance system
- Tasks: Assign a new task to a user, role or record owner

Start with the Default Workflow User; go to **Setup** > **Process Automation Settings** > change the name of the **Default Workflow User** to the Sage People Support user.

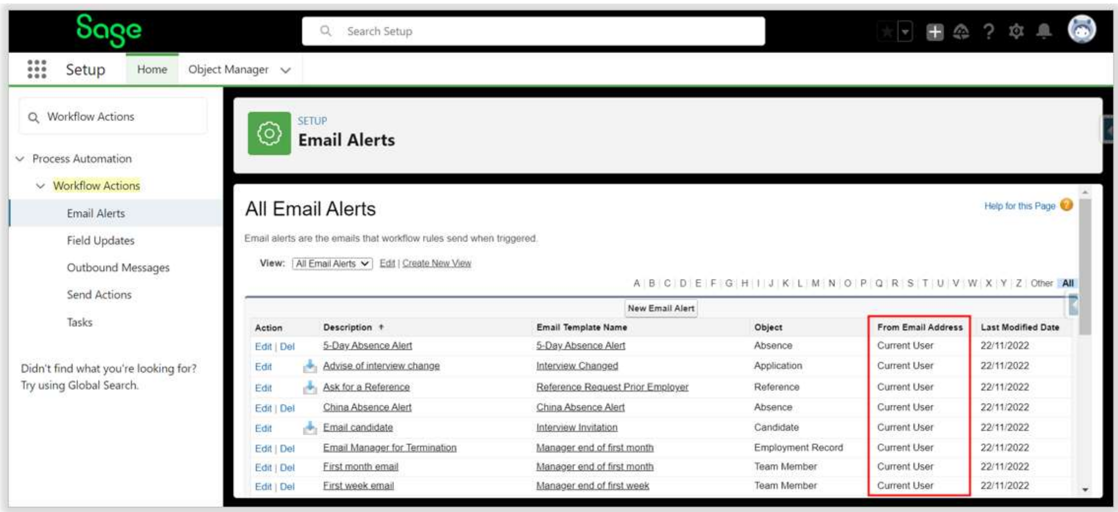
Note: If you use the Sage People Support user as the Default Workflow User, you will never have to do this check again as this user record will never be deactivated.



Tip: Since there are many potential settings in this area, you may find it easier to deactivate the leaving System Administrator user record (go to **Setup** > **Users** > change the **View** to **Admin View** > find the users name > click **Edit** > remove the tick from the **Active** field > click **Save**) and work through the errors one by one; the system will always prompt you if there is something that needs to be rectified first. If the error links do not work, switch to Salesforce Classic and then try clicking the links.

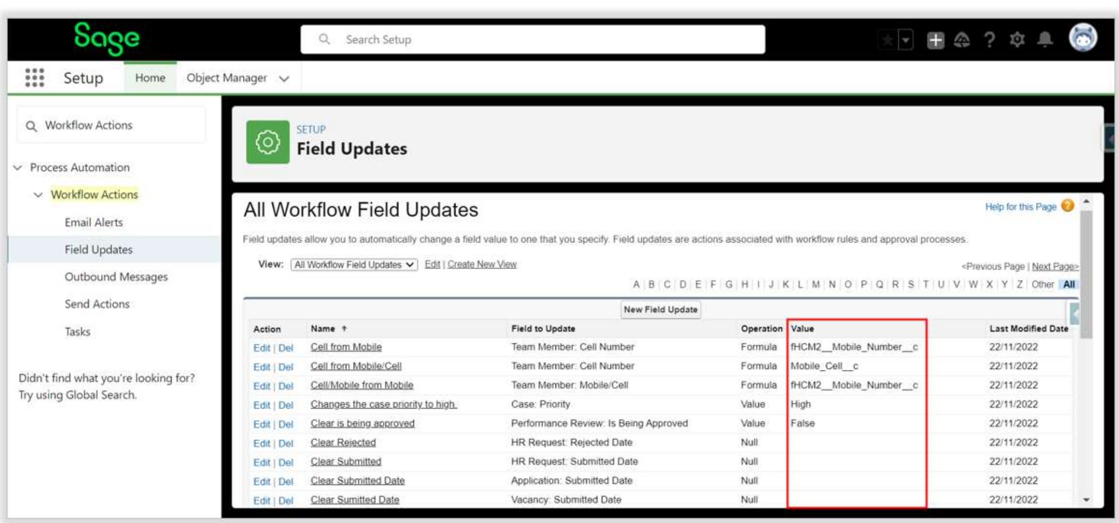
- Email Alerts

Go to **Setup** > **Workflow Actions** > **Email Alerts** > **View: All Email Alerts** > click on the **From Email Address** column header to sort the Email Alerts by name > if there are any Email Alerts from the leaving System Administrator, click **Edit** for each Email Alert and update the **From Email Address** field.



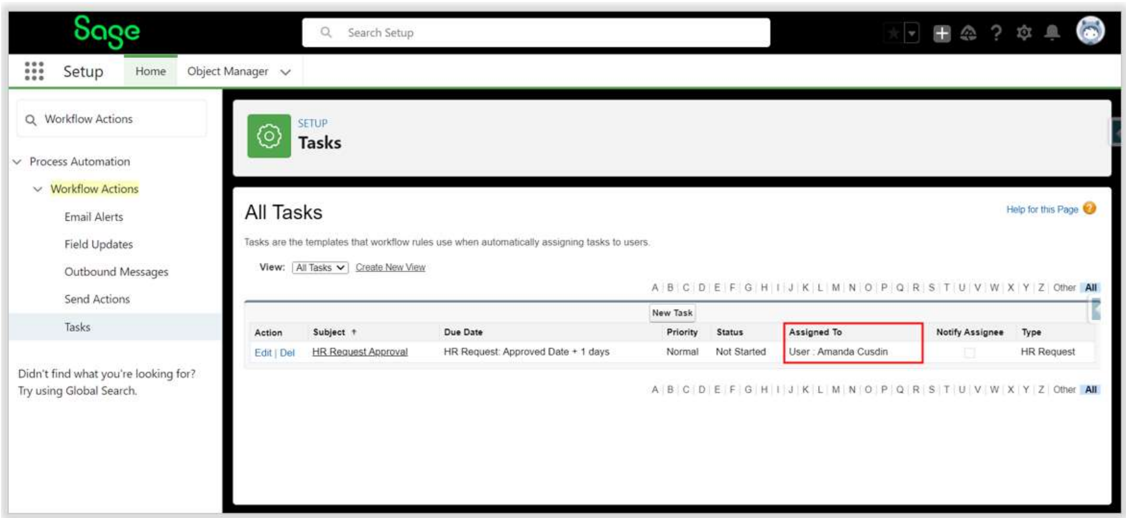
- Field Updates

Go to **Setup** > **Workflow Actions** > **Field Updates** > **View: All Workflow Field Updates** > scroll down the Value column and check that there is no reference to the leaving System Administrator, if you find any references, click **Edit** and update the formula/value with the new System Administrator user.

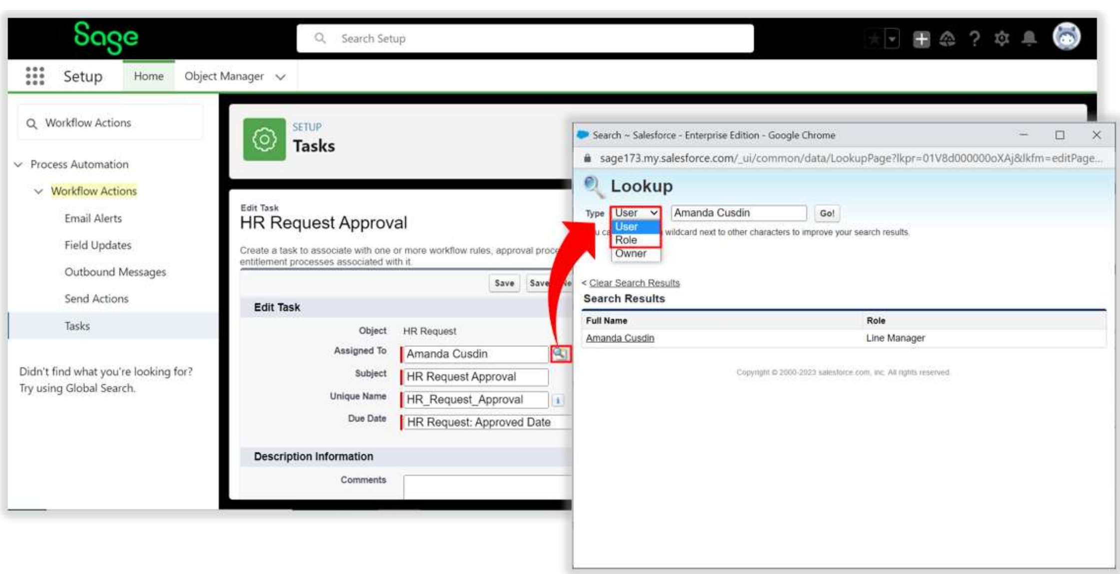


- <u>Tasks</u>

Go to **Setup** > **Workflow Actions** > **Tasks** > **View: All Tasks** > click on the **Assigned To** column header to sort Tasks by name > if there are any Tasks from the leaving System Administrator, click **Edit** for each Task and update the **Assigned To** field.



Tasks can be assigned to another User or to a Role e.g. HR. Once you have clicked **Edit** > click on the **magnifying glass icon** to the right of the **Assigned To** field > click on the dropdown selection in the Type field and change to **Role** > select **Role** > click **Save**.



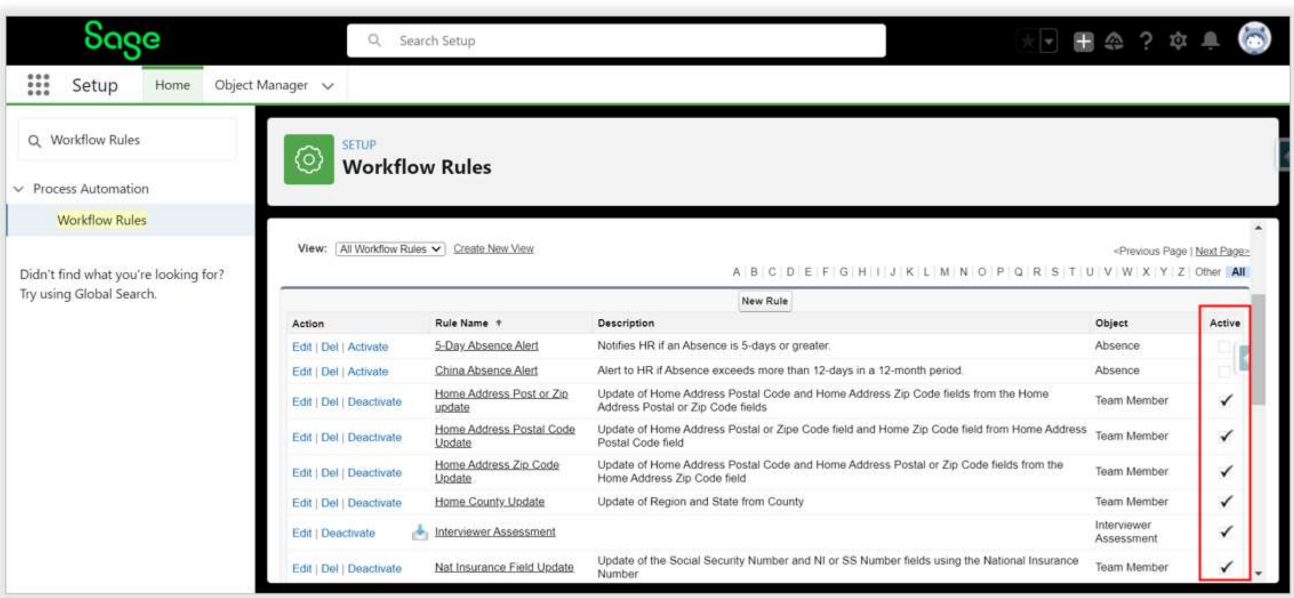
Workflow Rules

Each Workflow Rule consists of:

- Criteria that trigger the Workflow Rule to run
- Immediate actions that execute when a record matches the criteria
- Time-dependent actions that queue when a record matches the criteria and execute according to time triggers

Analyse the criteria for each workflow rule and if there are any references to the leaving System Administrator, they need to be changed.

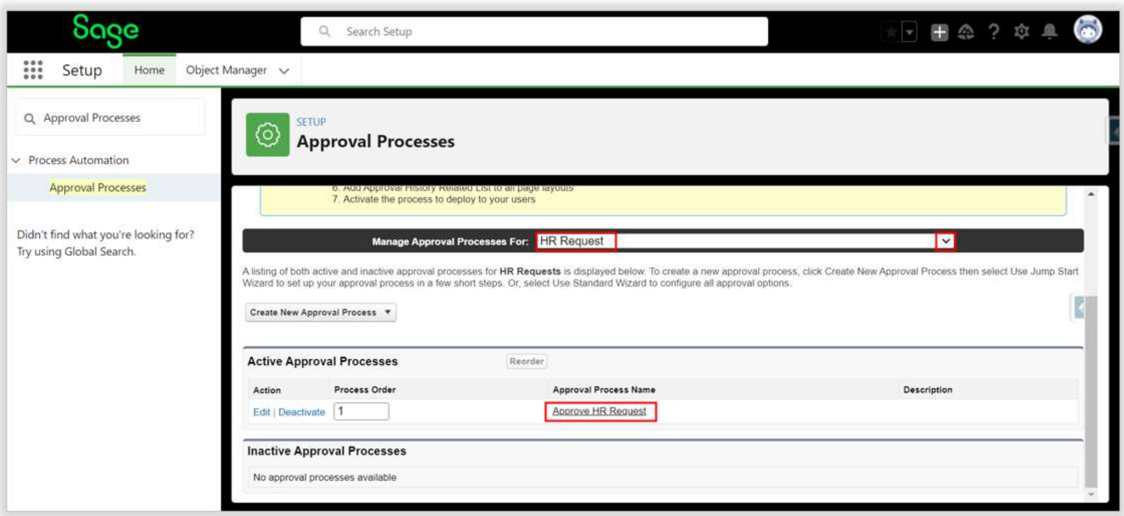
Go to **Setup** > **Workflow Rules** > **View: Workflow Rules** > check that each **Active** Workflow Rule does not reference the leaving System Administrator, if you find any references, click **Edit** and update the relevant field with the new System Administrator user.



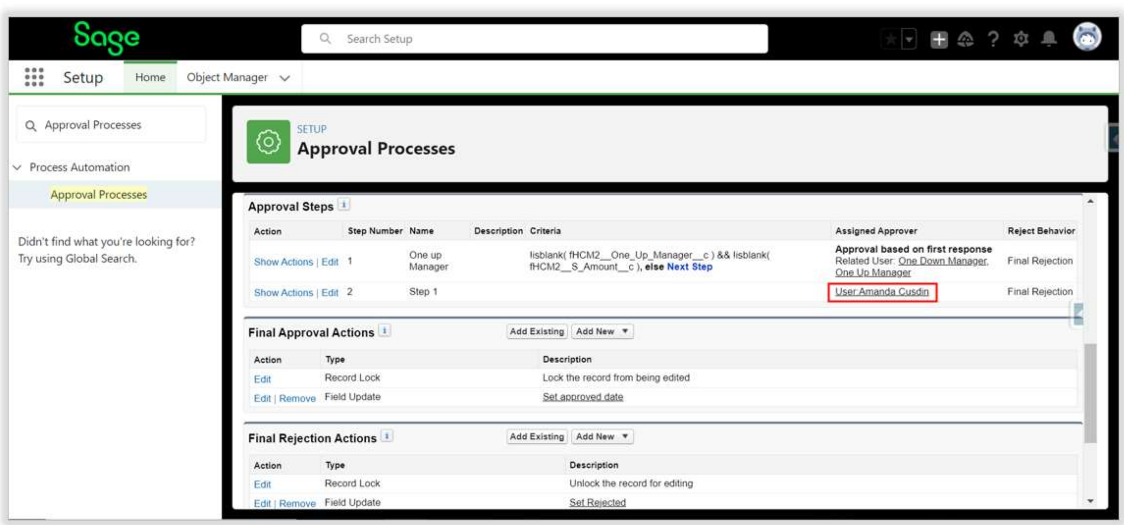
Approval Processes

Approvals contain many settings where the name of a user can be hard coded; you will need to check all active Approval Processes to ensure the Approver and Delegated Approver are correct and if there are any references to the leaving System Administrator, they need to be changed.

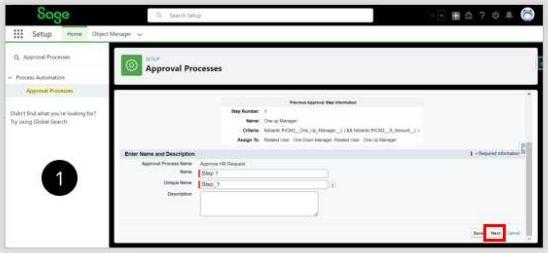
Go to **Setup** > **Approval Processes** > **Manage Approval Processes For:** select the required process e.g. **HR Requests** > in the **Active Approval Processes** section, click on the link of **the Approval Process Name** i.e. Approve HR Request



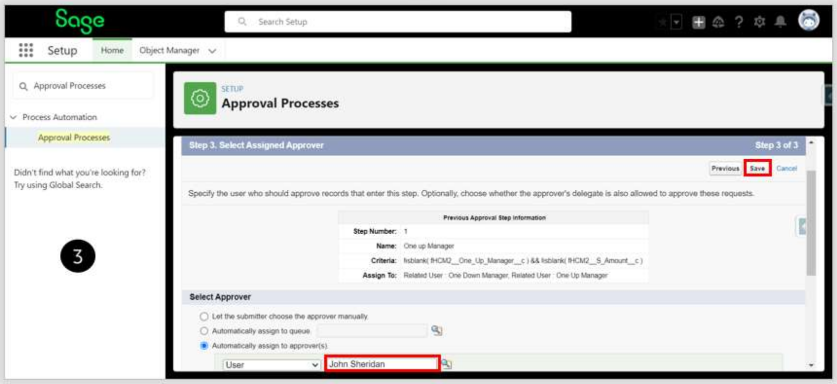
Scroll down to the **Approval Steps** section > check the **Assigned Approver** column to see if the leaving System Administrator is referenced; for the purpose of this example, Amanda Cusdin is the leaving System Administrator, so the Assigned Approver needs to be changed.



Click **Edit** > there are 3 screens/steps to move through, click **Next**, **Next** and on the 3rd screen, change the **Assigned Approver** > click **Save**. Go back to the **Manage Approval Process For:** list to check the next process and repeat.


Sage
Setup
Home
Object Manager
Approval Processes
Process Automation
Approval Processes
Didn't find what you're looking for? Try using Global Search.
1
SETUP
Approval Processes
Enter Name and Description
Next

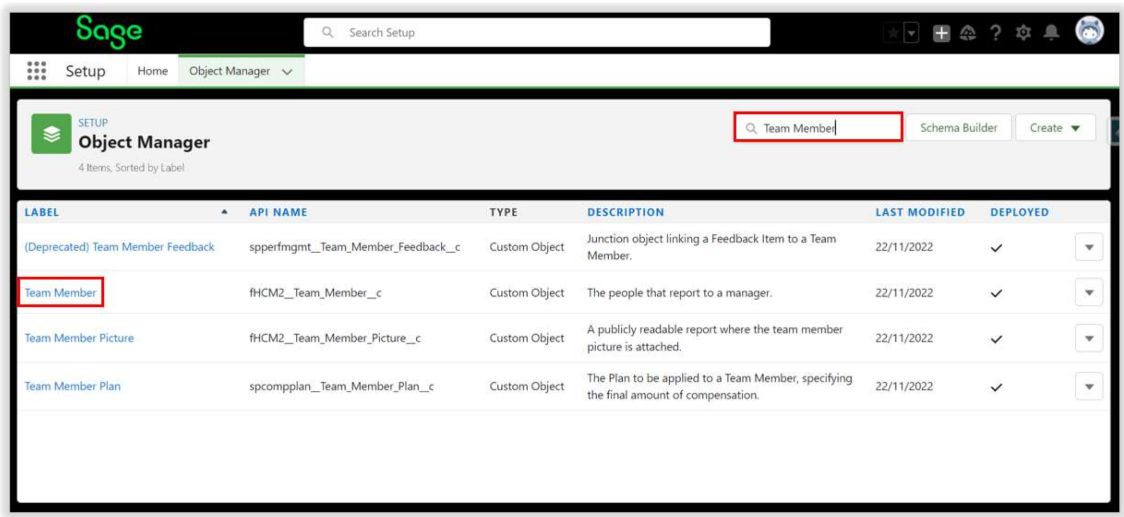

Sage
Setup
Home
Object Manager
Approval Processes
Process Automation
Approval Processes
Didn't find what you're looking for? Try using Global Search.
2
SETUP
Approval Processes
Step 1
Step 2. Specify Step Criteria
Step 2 of 3
Next
Specify Step Criteria


Sage
Search Setup
Setup
Home
Object Manager
Approval Processes
Process Automation
Approval Processes
Didn't find what you're looking for? Try using Global Search.
3
SETUP
Approval Processes
Step 3. Select Assigned Approver
Step 3 of 3
Previous
Save
Cancel
Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.
Previous Approval Step Information
Step Number: 1
Name: One up Manager
Criteria: !isblank(fHCM2__One_Up_Manager__c) && !isblank(fHCM2__S_Amount__c)
Assign To: Related User : One Down Manager, Related User : One Up Manager
Select Approver
Let the submitter choose the approver manually.
Automatically assign to queue.
Automatically assign to approver(s).
User
John Sheridan

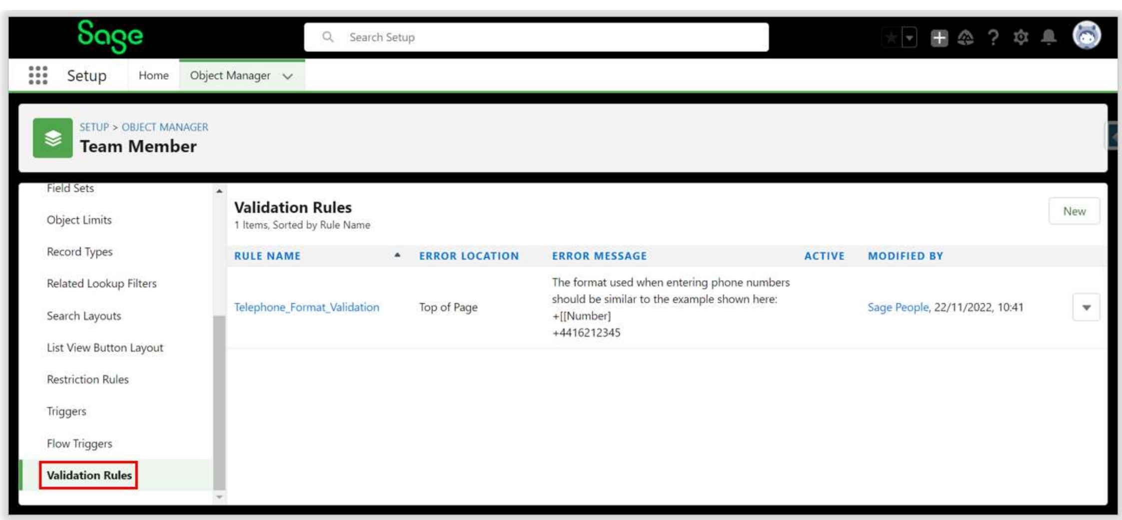
Validation Rules

Validation rules set up in Objects can be hard coded and should be scanned for references to the leaving System Administrator (or any inactive user). It is unlikely that you will find references to an individual user as user records should not be hard coded as they will change over time.

Go to **Setup** > **Object Manager** > in the Quick Find box, type in the Object name e.g. **Team Member** > click on the Object **Label** link.



Scroll down and click on **Validation Rules** > click the **Rule Name** link and if the leaving System Administrator is referenced, click **Edit** and change the user details > click **Save**.



Go back to the **Object Manager** tab and repeat the checks for the next Object.

Note: If there are any Validation Rule references to the leaving System Administrator, these will be highlighted as a descriptive error message when you try to deactivate the user record; you will be given a link to where the error is located.

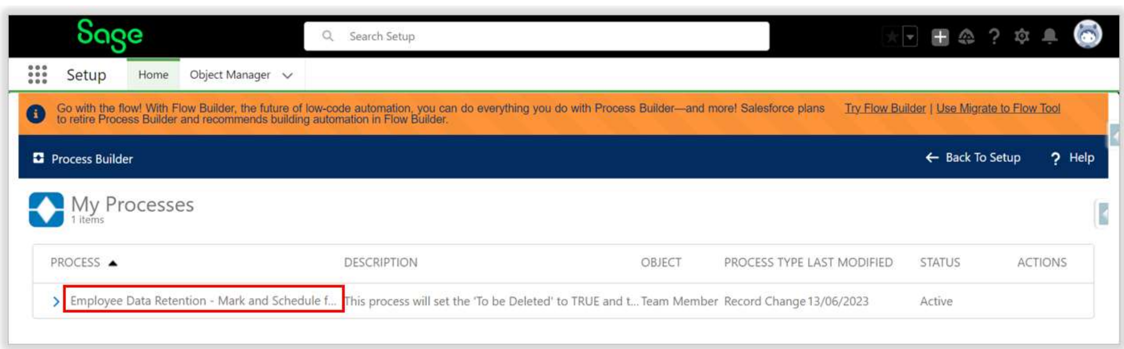
Process Builder and Flows

Processes cannot update records that are owned by inactive users. When you deactivate a user, you need to transfer the leaving user's records to an active user to avoid failed processes.

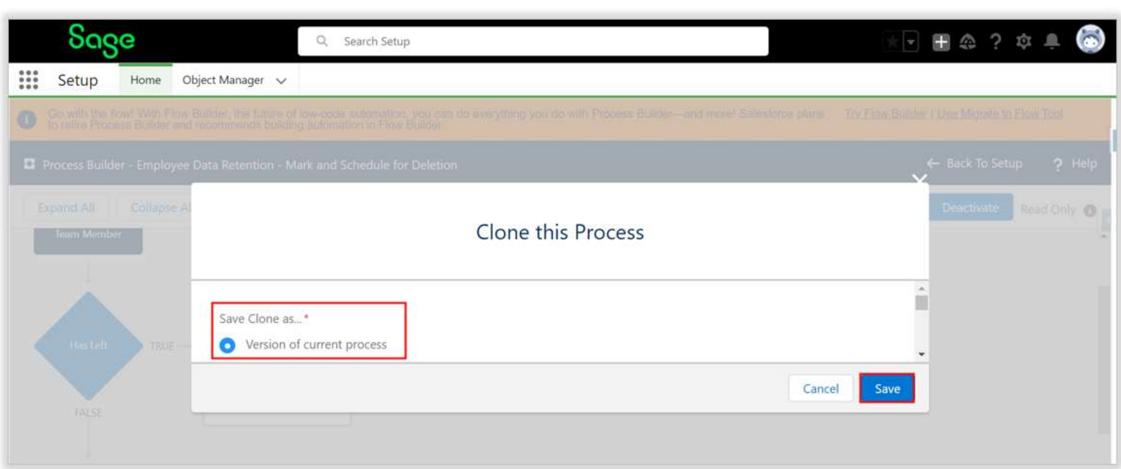
Process Builder has been replaced with Flows and in time this functionality will be deprecated. Any Process Builder that is currently Active will remain Active for now (these will need to be migrated to Flows over time). Active Process Builders cannot be edited, if you find reference to the leaving System Administrator during your checks, the Process Builder will either need to be deactivated and cloned as a new version to be edited or rebuilt using Flows.

Note: Information about Flows can be found in the Sage People Help center [here](). There is also an eLearning Flows training course on Sage U that can be accessed via the Community.

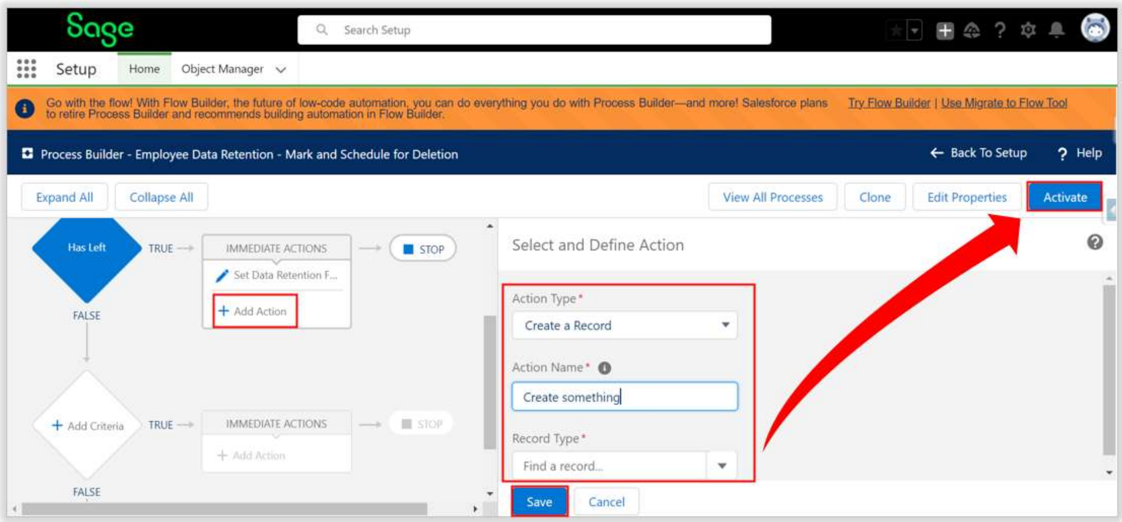
Go to **Setup** > **Process Builder** > click on the **Process** link.



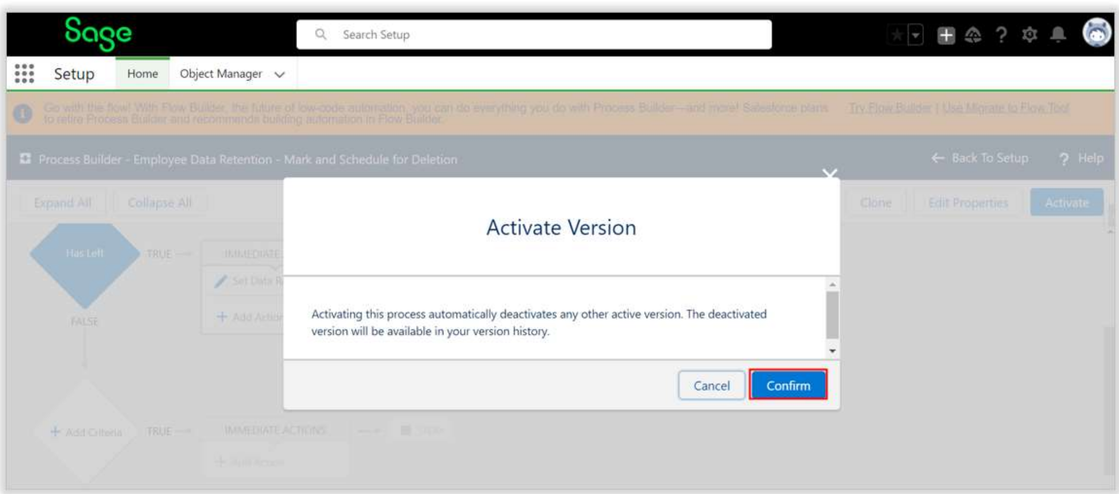
Check all **Immediate Actions** steps in the process flow to ensure that there is no reference to the leaving System Administrator. If you find any references to the leaving System Administrator, click **Clone**. The **Save Clone as...** defaults to **Version of current process** > click **Save**.



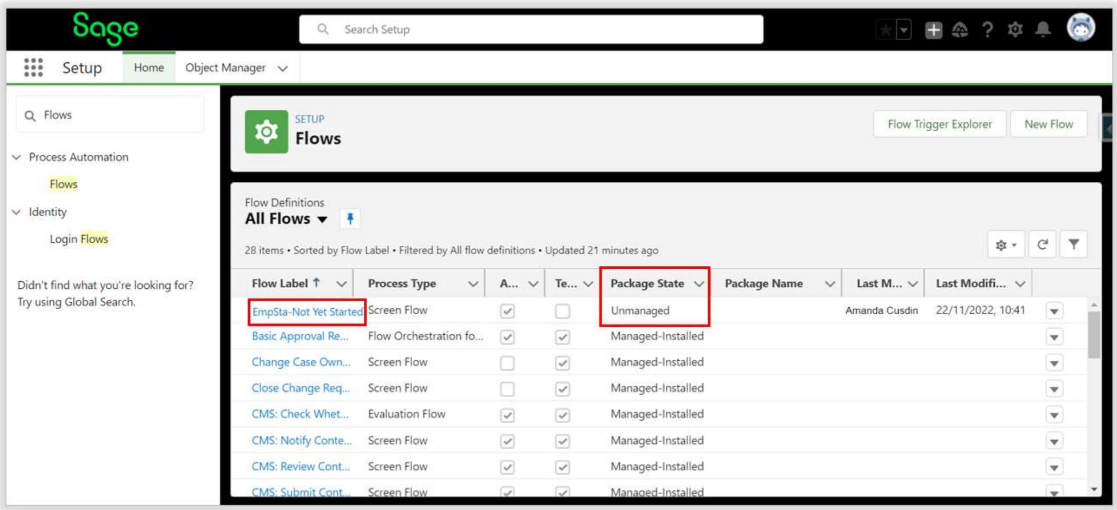
Make all required changes > **Save** the changes and then click **Activate**.



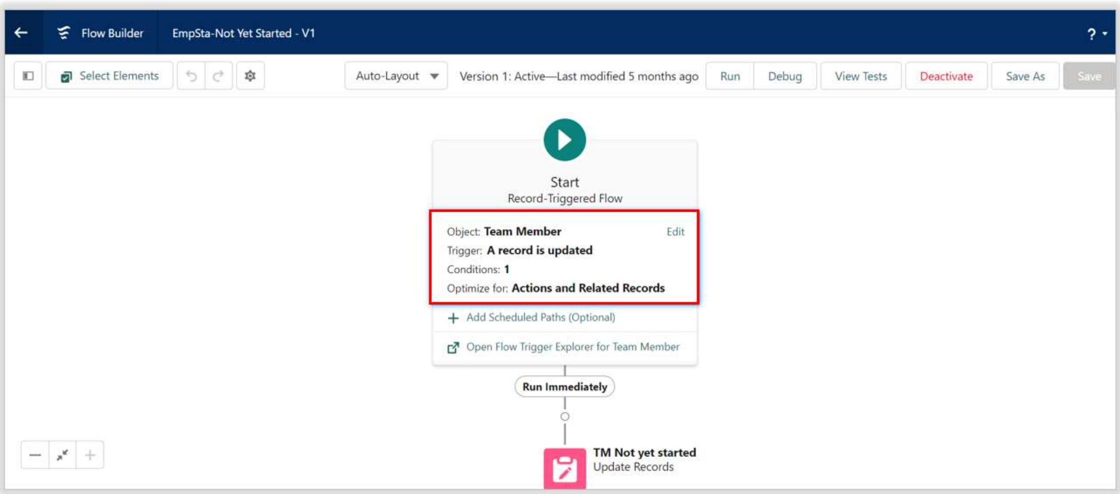
Activating the process will automatically deactivate the other active version, click **Confirm**. The deactivated version can be viewed in your version history should you need to refer to it.



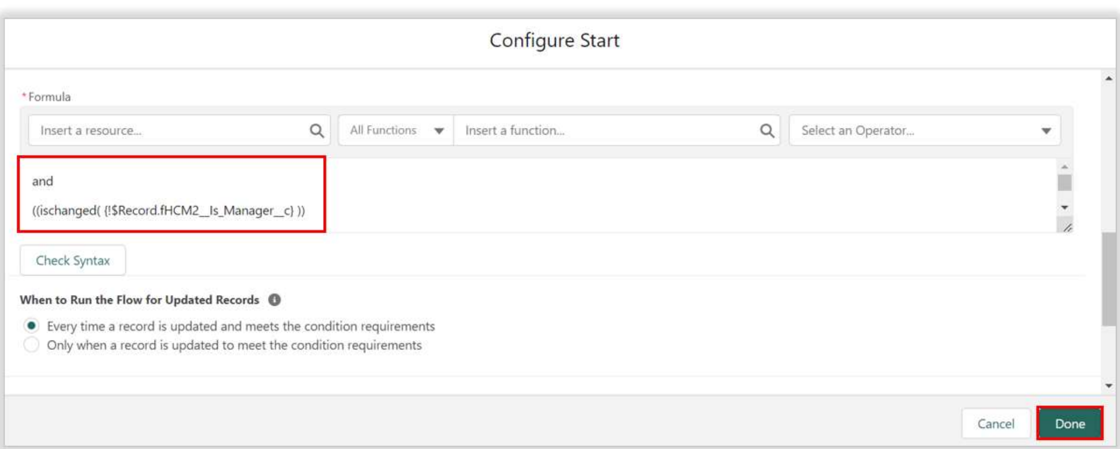
To check if the leaving System Administrator is referenced in any Flows, go to **Setup** > **Flows** > show **All Flows** > click on the **Package State** column header to group the Flows to show **Unmanaged** vs. **Managed-Installed**; you should check all **Unmanaged** Package State Flows > click the **Flow Label** link; the Flow opens in a new tab.



Click on the **Start** action of the process.

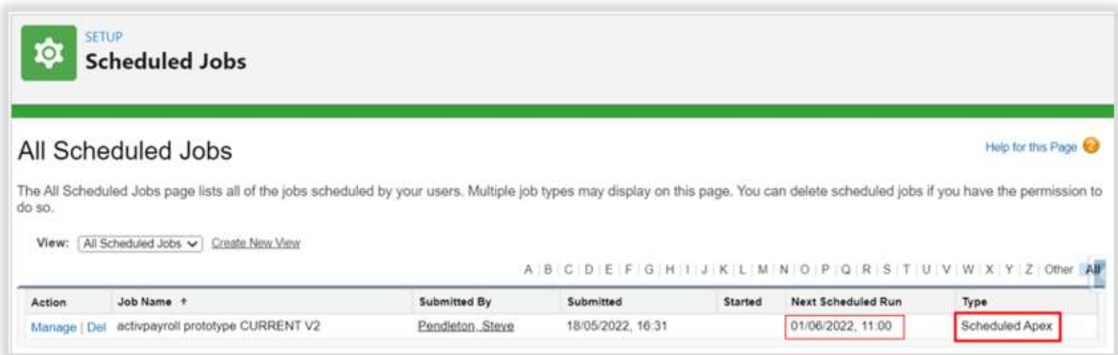


The **Configure Start** screen appears, check that there is no reference to the leaving System Administrator > in the unlikely event that you find a reference, make the change(s) > click **Done**. Repeat the steps for all active Flows.

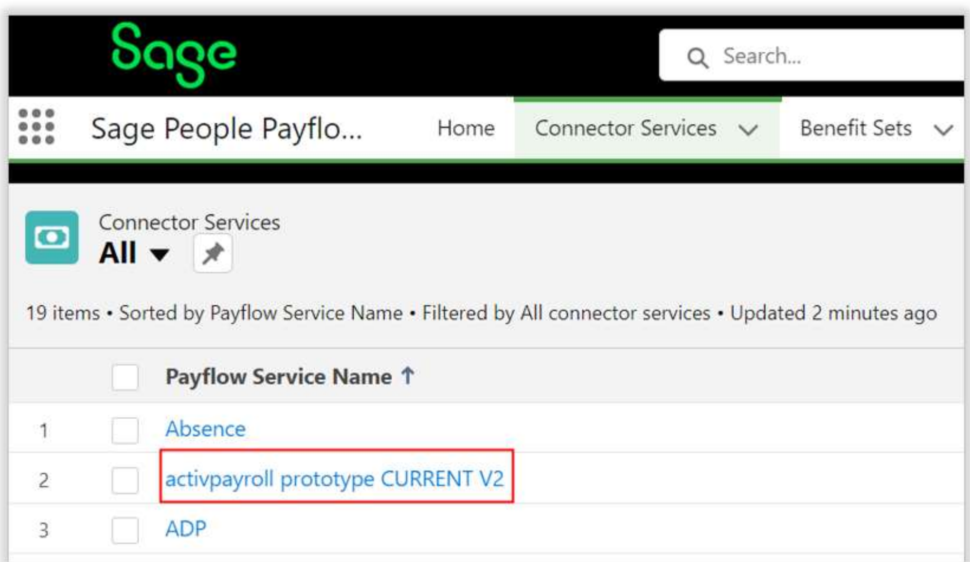


Scheduled Payflows

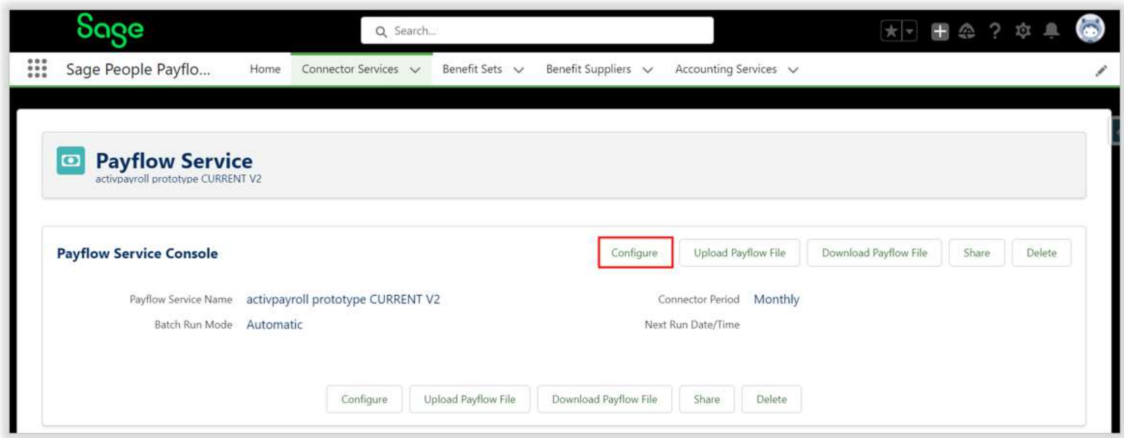
Scheduled Payflows show as type **Scheduled Apex** in **Scheduled Jobs**. If the leaving System Administrator is referenced in the **Submitted By** column for Payflow job(s), these will need to be re-scheduled to a new System Administrator user record.



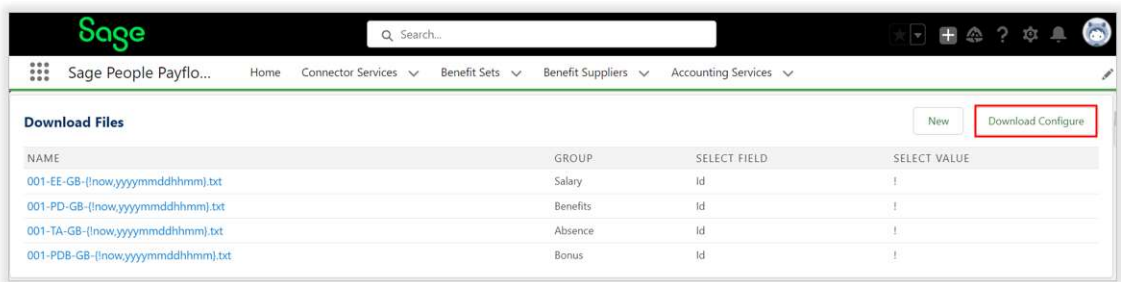
To re-assign the Payflow Scheduled Apex job to a new System Administrator record i.e. to the System Administrator who is carrying out these checks (yourself), from the App Launcher, type in **Payflow Services** and click the link of the Payflow Service Name.



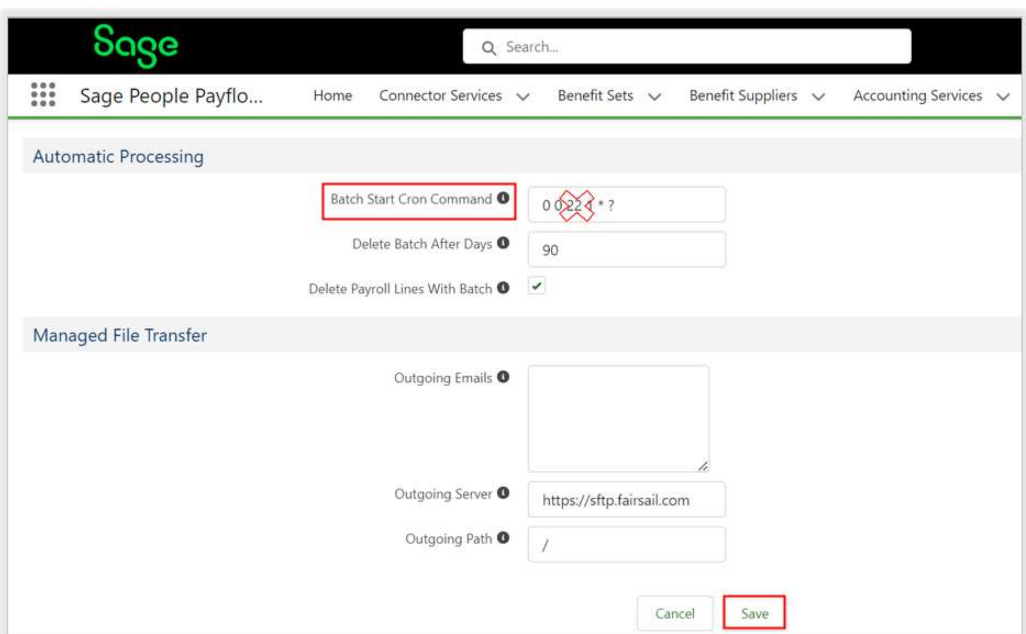
Click **Configure**.



Scroll down to the **Download Files** section and click **Download Configure.**

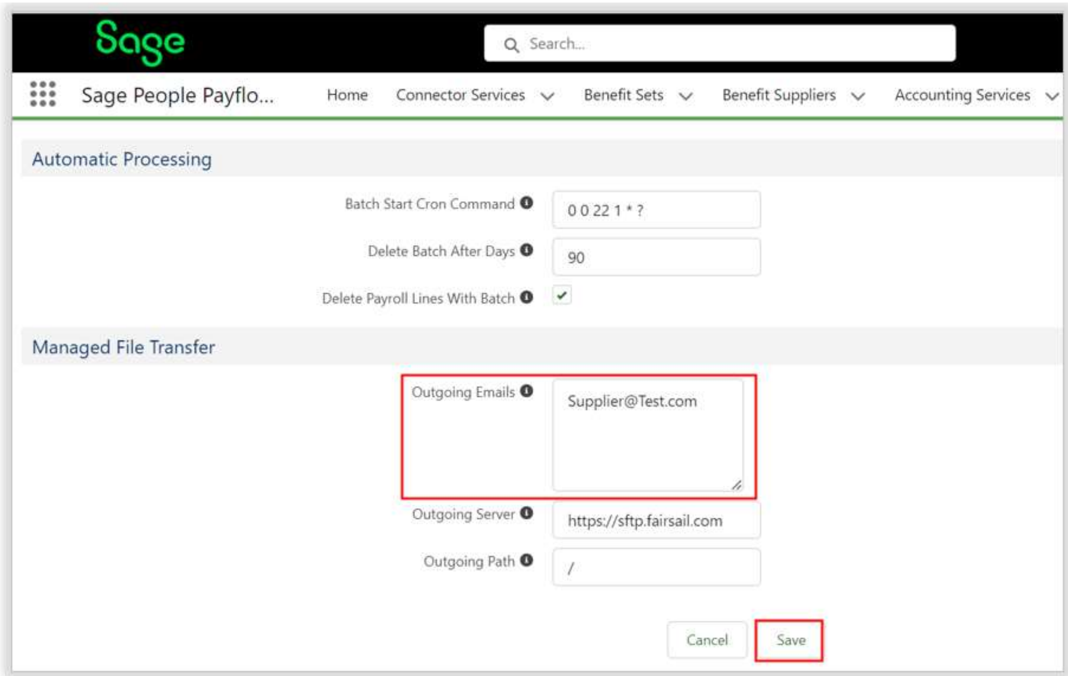


Scroll down to the **Automatic Processing** section, copy the Cron command in the **Batch Start Cron Command** field and paste this somewhere like Notepad as you will need this for the next step. Remove the Cron command from the field > click **Save**.



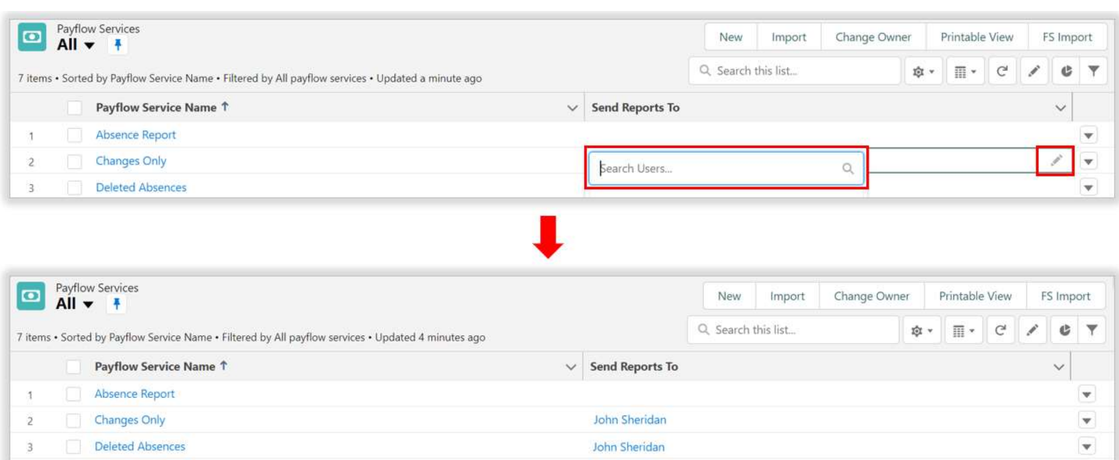
Go back to the to the **Download Files** > click **Download Configure**. Scroll down to the **Automatic Processing** section and paste in the Cron command that you copied in the step before into the **Batch Start Cron Command** field > click **Save**.

Note: This is also where you would add in/remove email recipients who should receive the Payflow file via email, go to the **Managed File Transfer** section and paste in the recipient's email address in the **Outgoing Emails** field > click **Save**.



Check the user who receives the Payflow reports; if this is the leaving System Administrator, the reports will need to be sent to a new System Administrator user.

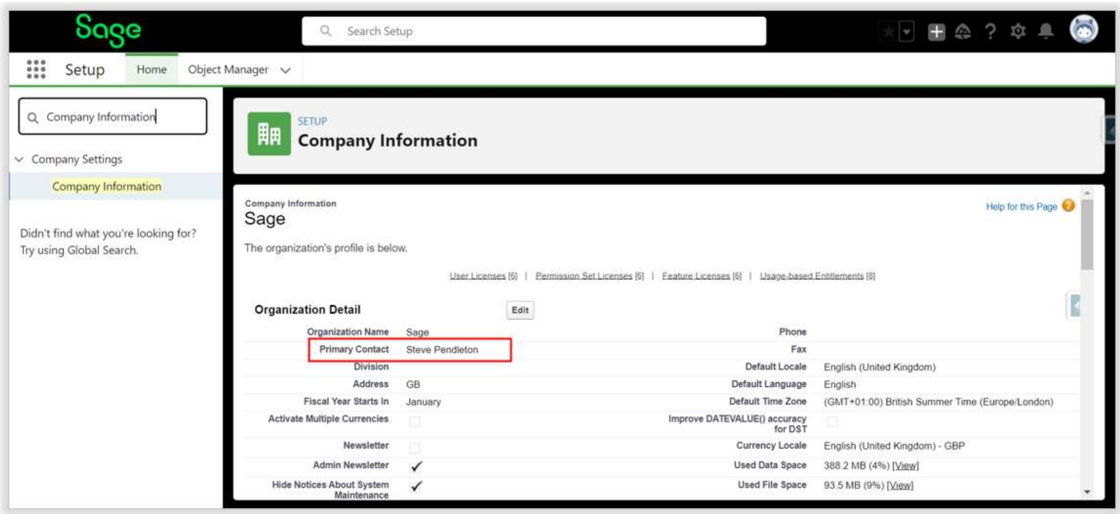
From the **App Launcher**, go to **Payflow Services** > if the **Send Reports To** column shows the leaving System Administrator as the recipient of the report(s), click on the **pencil** icon to select the name of the new recipient > click **Save**.



Main Company Contact

If the leaving System Administrator is the main contact for the company, the new main company contact details need to be updated in the org.

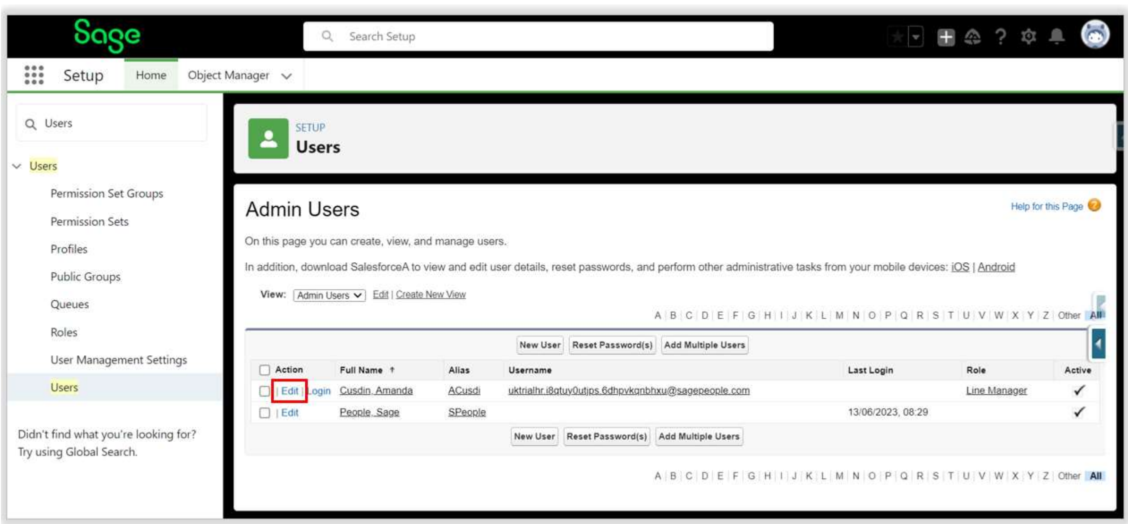
Go to **Setup** > **Company Information** > click **Edit** and update the **Primary Contact** field along with any relevant contact information > click **Save**.



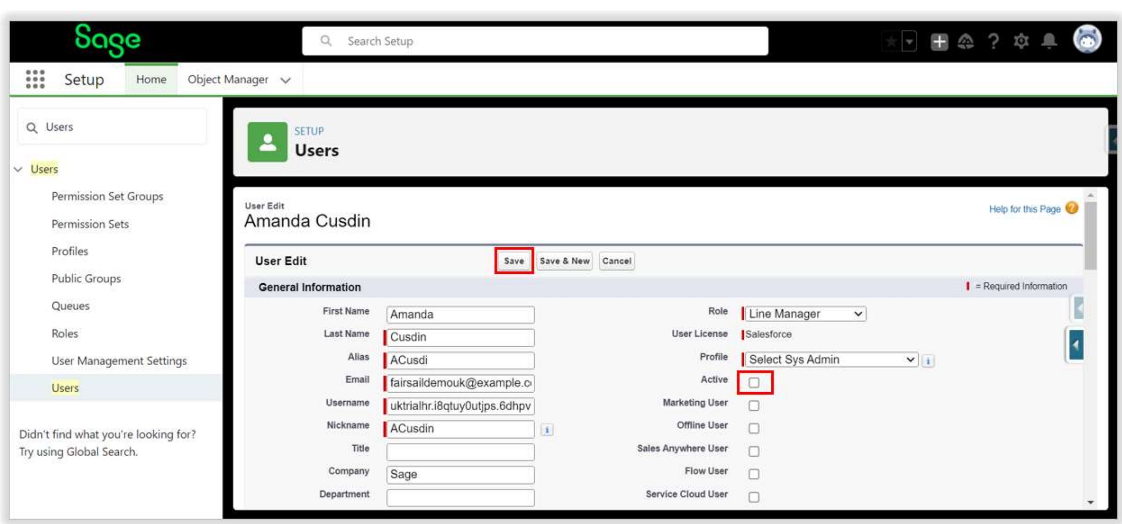
Deactivate the leaving System Administrator User record

The **HandleLeaversUserBatch** will process all leaver records daily and if the leaver record meets the batch running parameters, the user record will automatically deactivate. When it comes to deactivating System Administrator records, it is likely that these will fail in the batch run and remain Active as typically the user record is assigned to various processes within the system such as Workflow tasks, scheduled reports etc. and these assignments will need to be rectified first before the user record can be deactivated.

To manually deactivate a user record, go to **Setup** > **Users** > change the **View** to **Admin View** > find the users name > click **Edit**.



Remove the tick from the **Active** field > click **Save**.



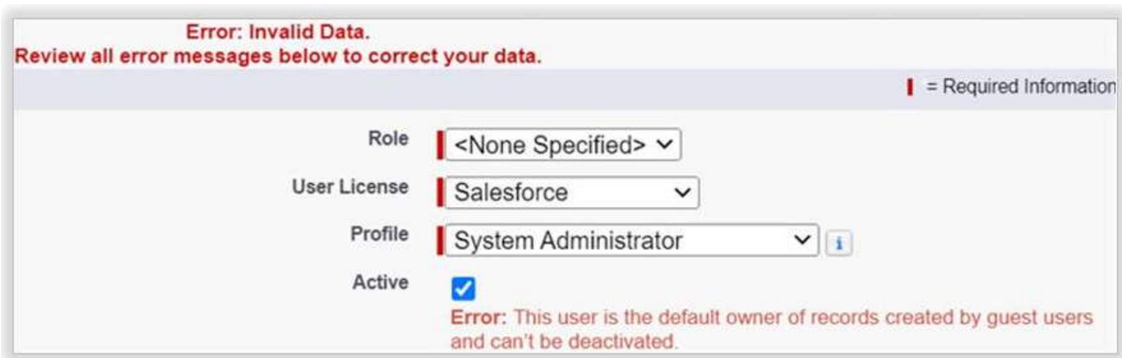
Note: As you progress through the deactivation steps, you will likely receive multiple descriptive error messages containing a link to the setting. This is one of those times that you will need to switch to Classic if the links do not all work within the Lightning UI Experience.

Error message examples

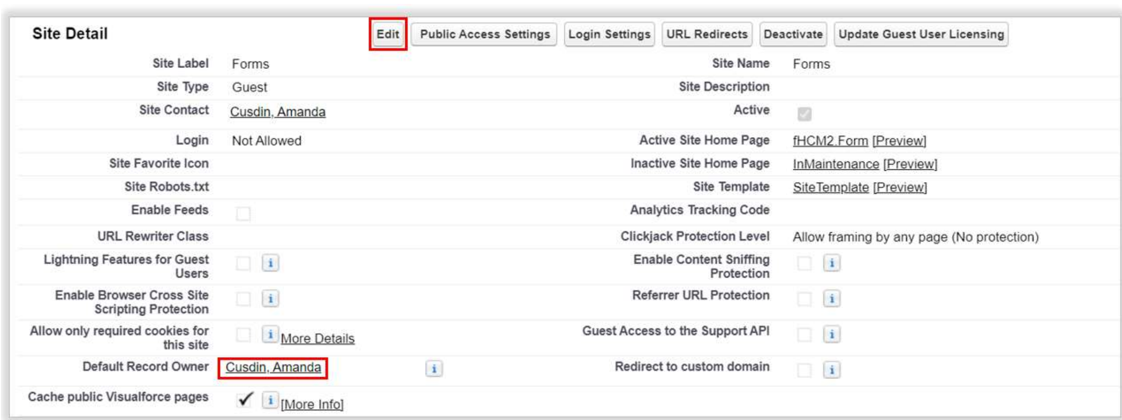
Some of the common error messages that could appear are shown below and relate to Workflows and Approvals:

- User in the Criteria
- Does the Field Update, update to the Username
- Task Assigned to the User
- Email Sent to the User
- In an Approval Process/Approver/Delegated Approver
- Default Workflow User

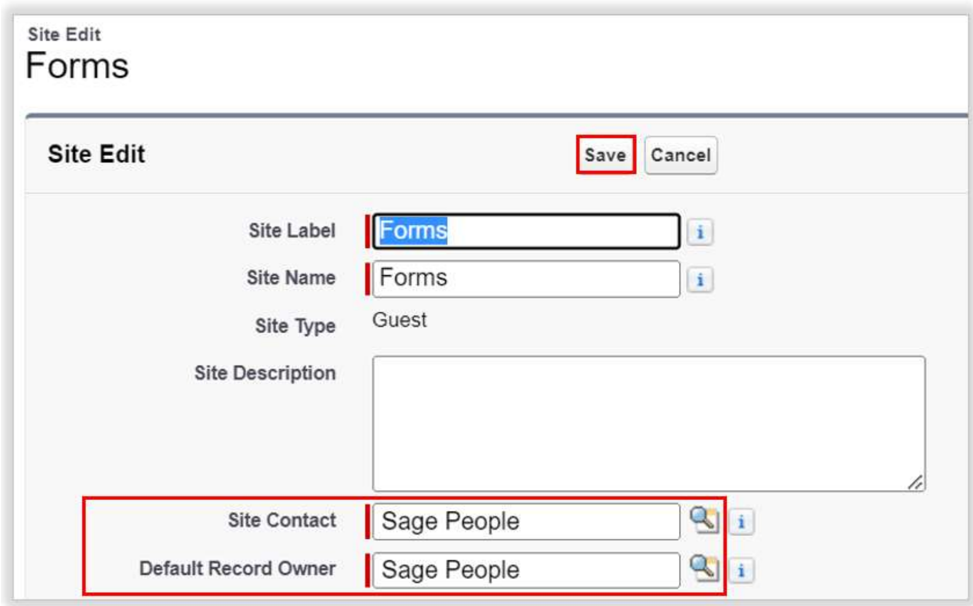
Another common error you may experience relates to the Guest User e.g. the System Administrator has left, and their licence needs to be deactivated but this can’t happen until the Guest User owner is changed:



To rectify the error, go to **Setup** > **Sites** > click on each of the **Site Label** links and check/update the **Default Record Owner** to be the Sage People Support user > click **Edit**.



Update the **Site Contact** and **Default Record Owner** fields with the **Sage People Support** user > click **Save**.


Site Edit
Forms
Site Edit
Save
Cancel
Site Label
Forms
Site Name
Forms
Site Type
Guest
Site Description
Site Contact
Sage People
Default Record Owner
Sage People

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