

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](#)

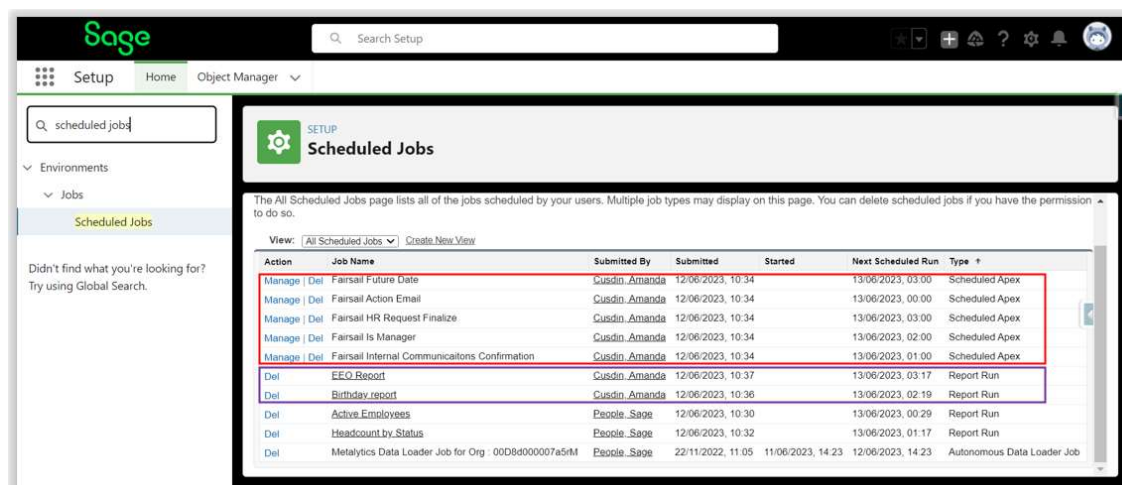
Configuration Checks

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.



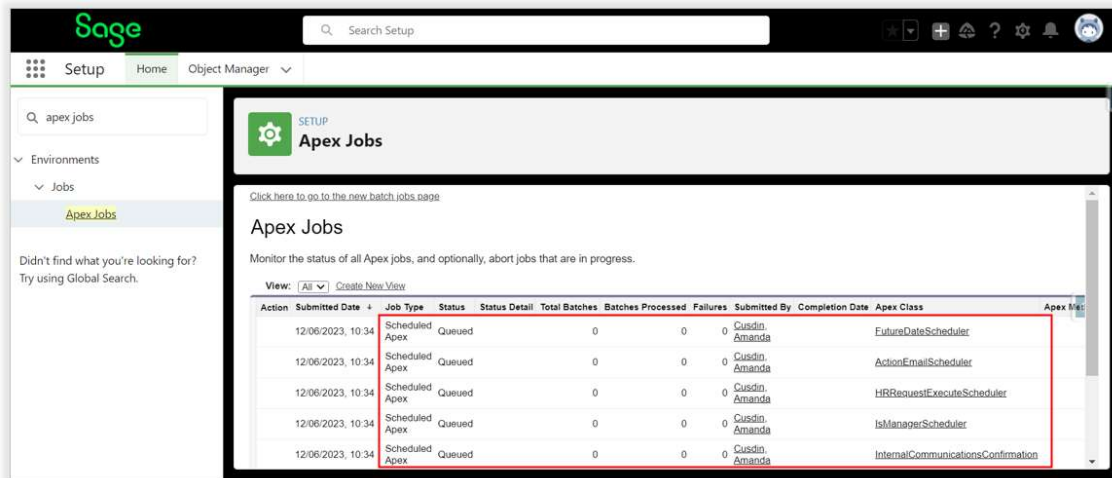
Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage Del	Fairsail Future Date	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 03:00	Scheduled Apex
Manage Del	Fairsail Action Email	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 00:00	Scheduled Apex
Manage Del	Fairsail HR Request Finalize	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 03:00	Scheduled Apex
Manage Del	Fairsail Is Manager	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 02:00	Scheduled Apex
Manage Del	Fairsail Internal Communications Confirmation	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 01:00	Scheduled Apex
Del	EEQ Report	Cusdin, Amanda	12/06/2023, 10:37		13/06/2023, 03:17	Report Run
Del	Birthday report	Cusdin, Amanda	12/06/2023, 10:36		13/06/2023, 02:19	Report Run
Del	Active Employees	People_Sage	12/06/2023, 10:30		13/06/2023, 00:29	Report Run
Del	Headcount by Status	People_Sage	12/06/2023, 10:32		13/06/2023, 01:17	Report Run
Del	Metalytics Data Loader Job for Org 00D84000007a5fM	People_Sage	22/11/2022, 11:05	11/06/2023, 14:23	12/06/2023, 14:23	Autonomous Data Loader Job

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.

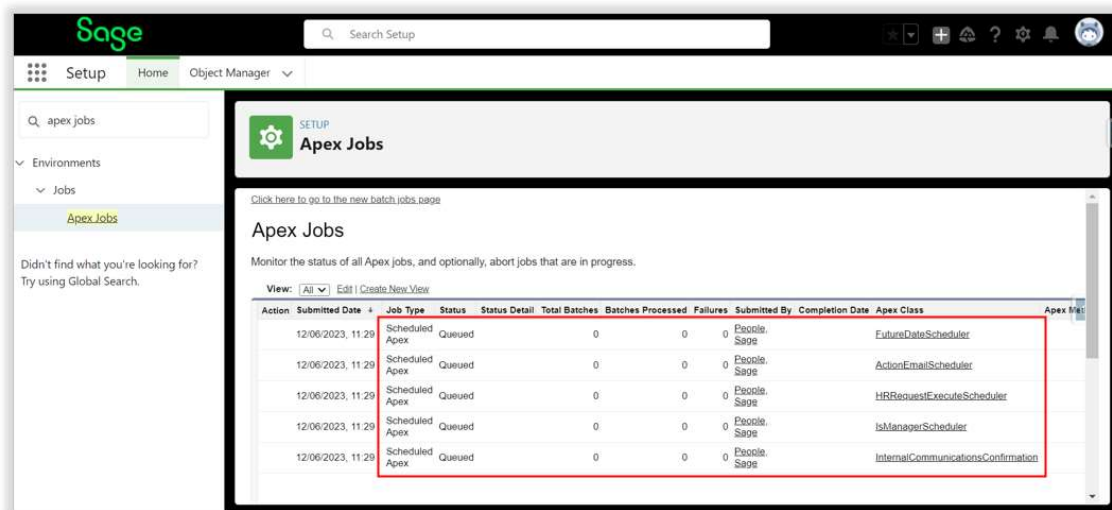


The screenshot shows the Sage Apex Jobs page. The table lists five scheduled Apex jobs, all with a status of 'Queued' and submitted by 'Cusdin Amanda'. The jobs are: FutureDateScheduler, ActionEmailScheduler, HRRequestExecuteScheduler, IsManagerScheduler, and InternalCommunicationsConfirmation. A red box highlights the 'Submitted By' column for all rows.

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class
	12/06/2023, 10:34	Scheduled Apex	Queued		0	0	0	Cusdin Amanda		FutureDateScheduler
	12/06/2023, 10:34	Scheduled Apex	Queued		0	0	0	Cusdin Amanda		ActionEmailScheduler
	12/06/2023, 10:34	Scheduled Apex	Queued		0	0	0	Cusdin Amanda		HRRequestExecuteScheduler
	12/06/2023, 10:34	Scheduled Apex	Queued		0	0	0	Cusdin Amanda		IsManagerScheduler
	12/06/2023, 10:34	Scheduled Apex	Queued		0	0	0	Cusdin Amanda		InternalCommunicationsConfirmation

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.

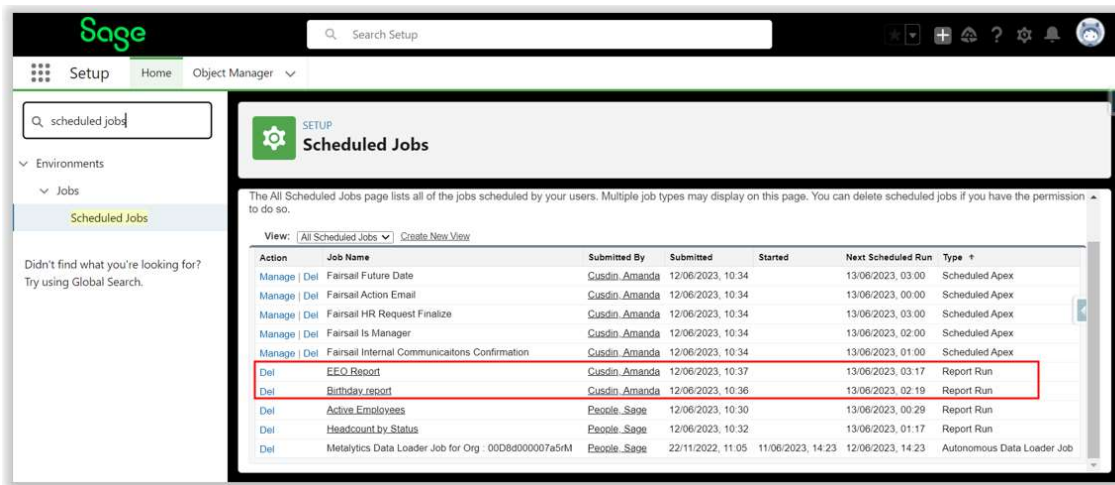


The screenshot shows the Sage Apex Jobs page after the update. The table lists five scheduled Apex jobs, all with a status of 'Queued' and submitted by 'People Sage'. The jobs are: FutureDateScheduler, ActionEmailScheduler, HRRequestExecuteScheduler, IsManagerScheduler, and InternalCommunicationsConfirmation. A red box highlights the 'Submitted By' column for all rows.

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class
	12/06/2023, 11:29	Scheduled Apex	Queued		0	0	0	People Sage		FutureDateScheduler
	12/06/2023, 11:29	Scheduled Apex	Queued		0	0	0	People Sage		ActionEmailScheduler
	12/06/2023, 11:29	Scheduled Apex	Queued		0	0	0	People Sage		HRRequestExecuteScheduler
	12/06/2023, 11:29	Scheduled Apex	Queued		0	0	0	People Sage		IsManagerScheduler
	12/06/2023, 11:29	Scheduled Apex	Queued		0	0	0	People Sage		InternalCommunicationsConfirmation

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.



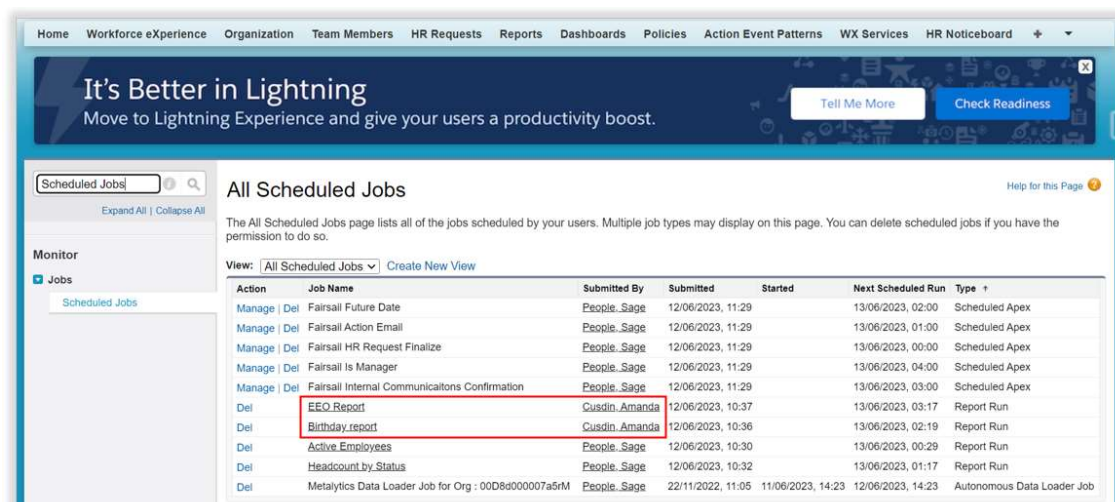
The screenshot shows the Sage Setup interface with the 'Scheduled Jobs' page selected. The page title is 'SETUP Scheduled Jobs'. Below the title, there is a description: 'The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.' Below this, there is a 'View:' dropdown set to 'All Scheduled Jobs' and a 'Create New View' link. The main table lists scheduled jobs with columns: Action, Job Name, Submitted By, Submitted, Started, Next Scheduled Run, and Type. The table contains several rows, with the 'EEO Report' and 'Birthday report' rows highlighted in red. The 'Submitted By' column for these rows shows 'Cusdin, Amanda'.

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage Del	Fairsail Future Date	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 03:00	Scheduled Apex
Manage Del	Fairsail Action Email	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 00:00	Scheduled Apex
Manage Del	Fairsail HR Request Finalize	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 03:00	Scheduled Apex
Manage Del	Fairsail Is Manager	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 02:00	Scheduled Apex
Manage Del	Fairsail Internal Communications Confirmation	Cusdin, Amanda	12/06/2023, 10:34		13/06/2023, 01:00	Scheduled Apex
Del	EEO Report	Cusdin, Amanda	12/06/2023, 10:37		13/06/2023, 03:17	Report Run
Del	Birthday report	Cusdin, Amanda	12/06/2023, 10:36		13/06/2023, 02:19	Report Run
Del	Active Employees	People_Sage	12/06/2023, 10:30		13/06/2023, 00:29	Report Run
Del	Headcount by Status	People_Sage	12/06/2023, 10:32		13/06/2023, 01:17	Report Run
Del	Metalytics Data Loader Job for Org : 00D8d000007a5fM	People_Sage	22/11/2022, 11:05	11/06/2023, 14:23	12/06/2023, 14:23	Autonomous Data Loader Job

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:



The screenshot shows the Salesforce Classic interface with the 'Setup' page selected. The page title is 'All Scheduled Jobs'. Below the title, there is a description: 'The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.' Below this, there is a 'View:' dropdown set to 'All Scheduled Jobs' and a 'Create New View' link. The main table lists scheduled jobs with columns: Action, Job Name, Submitted By, Submitted, Started, Next Scheduled Run, and Type. The table contains several rows, with the 'EEO Report' and 'Birthday report' rows highlighted in red. The 'Submitted By' column for these rows shows 'Cusdin, Amanda'.

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage Del	Fairsail Future Date	People_Sage	12/06/2023, 11:29		13/06/2023, 02:00	Scheduled Apex
Manage Del	Fairsail Action Email	People_Sage	12/06/2023, 11:29		13/06/2023, 01:00	Scheduled Apex
Manage Del	Fairsail HR Request Finalize	People_Sage	12/06/2023, 11:29		13/06/2023, 00:00	Scheduled Apex
Manage Del	Fairsail Is Manager	People_Sage	12/06/2023, 11:29		13/06/2023, 04:00	Scheduled Apex
Manage Del	Fairsail Internal Communications Confirmation	People_Sage	12/06/2023, 11:29		13/06/2023, 03:00	Scheduled Apex
Del	EEO Report	Cusdin, Amanda	12/06/2023, 10:37		13/06/2023, 03:17	Report Run
Del	Birthday report	Cusdin, Amanda	12/06/2023, 10:36		13/06/2023, 02:19	Report Run
Del	Active Employees	People_Sage	12/06/2023, 10:30		13/06/2023, 00:29	Report Run
Del	Headcount by Status	People_Sage	12/06/2023, 10:32		13/06/2023, 01:17	Report Run
Del	Metalytics Data Loader Job for Org : 00D8d000007a5fM	People_Sage	22/11/2022, 11:05	11/06/2023, 14:23	12/06/2023, 14:23	Autonomous Data Loader Job

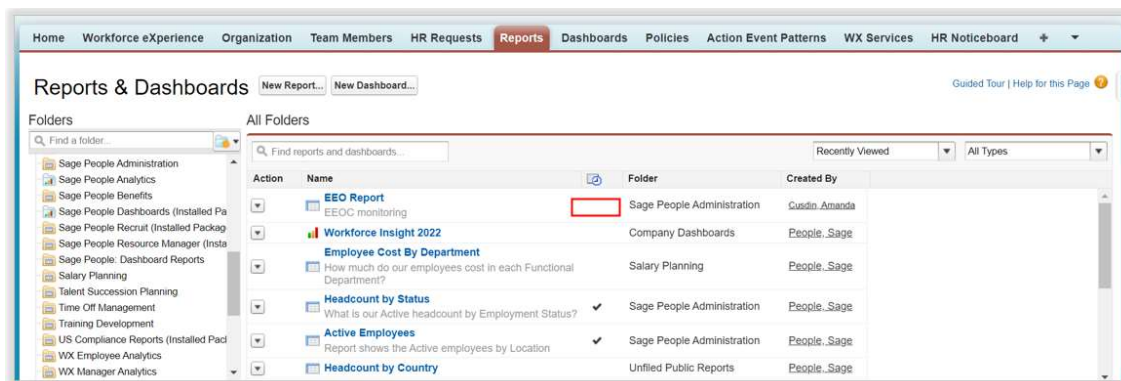
Click on the dropdown arrow to the right of **Run Report** and select **Schedule Future Runs**.

The screenshot shows the 'EEO Report' interface. At the top, there's a navigation bar with links like Home, Workforce eXperience, Organization, Team Members, HR Requests, Reports, Dashboards, Policies, Action Event Patterns, WX Services, and HR Noticeboard. Below this, the 'EEO Report' section has a 'Report Generation Status: Complete' and 'Report Options' section. The 'Report Options' section includes a 'Summarize information by:' dropdown set to 'Ethnicity', a 'Show' dropdown set to 'My team members', and a 'Time Frame' section with 'Date Field' set to 'Current Salary: Start Date' and 'Range' set to 'Custom' with dates '01/04/2012' to '30/06/2015'. Below these options, there's a 'Run Report' dropdown menu. A red box highlights the 'Run Report' dropdown, and a red arrow points to the 'Schedule Future Runs' option. To the right of the dropdown, there's a bar chart showing data for 'Gender' (Male and Female) with values 25, 36, and 30. The chart is titled 'Gender' and has a legend for Male (blue) and Female (green).

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

The screenshot shows the 'EEO Report' interface with the 'Schedule Report' section. At the top, there's a 'Schedule Report' header with buttons for 'Save Report Schedule', 'Cancel', and 'Unschedule Report'. The 'Unschedule Report' button is highlighted with a red box. Below the header, there's a 'Running User' field set to 'Amanda Cusdin'. Below that, there's an 'Email Report' section with radio buttons for 'To me' and 'To me and/or others...'. Below this, there's a 'Search' section with a dropdown set to 'Public Groups' and a 'Find' button. Below the search section, there's a 'Select From' and 'Send Email To' section. The 'Select From' section has a list of 'All Internal Users' and an 'Add' button. The 'Send Email To' section has a list of 'User: Amanda Cusdin' and 'User: John Sheridan' and a 'Remove' button. Below this, there's a 'Frequency' section with radio buttons for 'Daily', 'Weekly', 'Monthly', 'Every weekday', and 'Every day'. Below the frequency section, there's a 'Start' and 'End' date section with dates '12/06/2023' and '12/07/2023'. Below the date section, there's a 'Preferred Start Time' section set to '03:00' and a 'Show all available options...' link. At the bottom, there's a note: 'Exact start time will depend on job queue activity.'

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.

Home Workforce eXperience Organization Team Members HR Requests Reports Dashboards Policies Action Event Patterns WX Services HR Noticeboard

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Tell Me More Check Readiness

Scheduled Jobs

Expand All | Collapse All

All Scheduled Jobs

Help for this Page

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

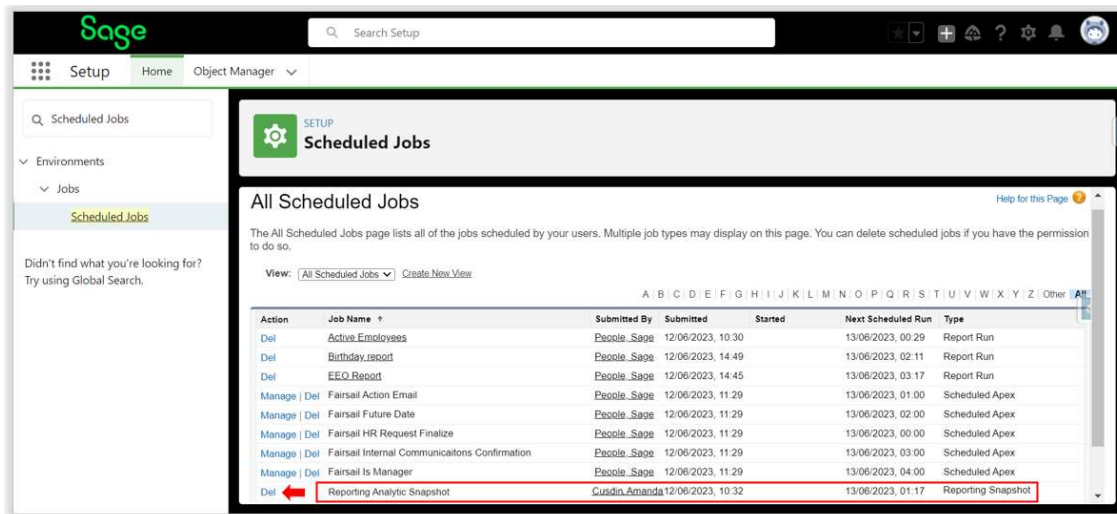
View: All Scheduled Jobs Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	Active Employees	People_Sage	12/06/2023, 10:30		13/06/2023, 00:29	Report Run
Del	Birthday Report	People_Sage	12/06/2023, 14:49		13/06/2023, 02:11	Report Run
Del	EEO Report	People_Sage	12/06/2023, 14:45		13/06/2023, 03:17	Report Run
Manage Del	Fairsail Action Email	People_Sage	12/06/2023, 11:29		13/06/2023, 01:00	Scheduled Apex
Manage Del	Fairsail Future Date	People_Sage	12/06/2023, 11:29		13/06/2023, 02:00	Scheduled Apex
Manage Del	Fairsail HR Request Finalize	People_Sage	12/06/2023, 11:29		13/06/2023, 00:00	Scheduled Apex
Manage Del	Fairsail Internal Communications Confirmation	People_Sage	12/06/2023, 11:29		13/06/2023, 03:00	Scheduled Apex
Manage Del	Fairsail Is Manager	People_Sage	12/06/2023, 11:29		13/06/2023, 04:00	Scheduled Apex
Del	Headcount by Status	People_Sage	12/06/2023, 10:32		13/06/2023, 01:17	Report Run
Del	Metalytics Data Loader Job for Org : 00D8d000007a5rM	People_Sage	22/11/2022, 11:05	12/06/2023, 14:23	13/06/2023, 14:23	Autonomous Data Loader Job

Reporting Snapshots

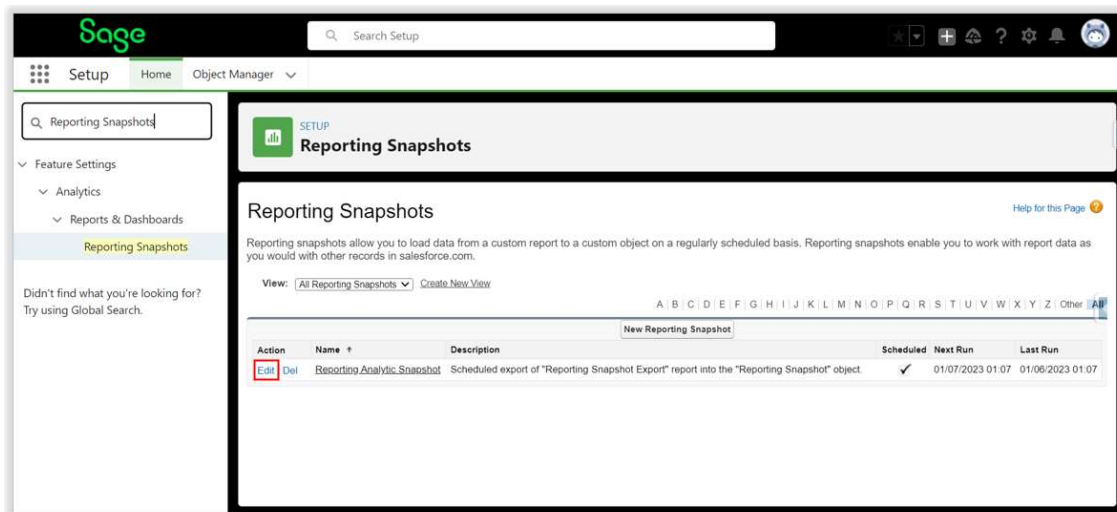
Amanda Cusdin is set up as the 'Running User' of the **Reporting Analytic Snapshot** report. To change the 'Running User', first you need to delete the report from the **Scheduled Job** screen, click **Del**.



The screenshot shows the Sage 'Scheduled Jobs' page. The left sidebar has 'Setup' selected, and 'Scheduled Jobs' is highlighted in the search bar. The main content area is titled 'All Scheduled Jobs' and contains a table of scheduled jobs. The job 'Reporting Analytic Snapshot' is highlighted with a red box, and its 'Del' button is also highlighted with a red box.

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	Active Employees	People_Sage	12/06/2023, 10:30		13/06/2023, 00:29	Report Run
Del	Birthday report	People_Sage	12/06/2023, 14:49		13/06/2023, 02:11	Report Run
Del	EEO Record	People_Sage	12/06/2023, 14:45		13/06/2023, 03:17	Report Run
Manage Del	Fairsail Action Email	People_Sage	12/06/2023, 11:29		13/06/2023, 01:00	Scheduled Apex
Manage Del	Fairsail Future Date	People_Sage	12/06/2023, 11:29		13/06/2023, 02:00	Scheduled Apex
Manage Del	Fairsail HR Request Finalize	People_Sage	12/06/2023, 11:29		13/06/2023, 00:00	Scheduled Apex
Manage Del	Fairsail Internal Communications Confirmation	People_Sage	12/06/2023, 11:29		13/06/2023, 03:00	Scheduled Apex
Manage Del	Fairsail Is Manager	People_Sage	12/06/2023, 11:29		13/06/2023, 04:00	Scheduled Apex
Del	Reporting Analytic Snapshot	Cusdin,Amanda	12/06/2023, 10:32		13/06/2023, 01:17	Reporting Snapshot

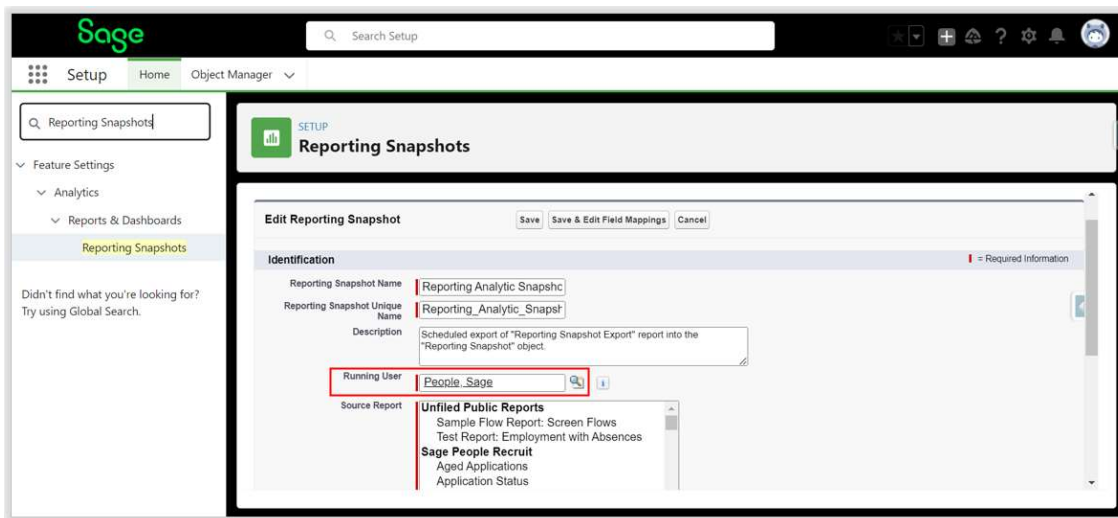
To re-schedule the report to the new 'Running User', go to **Setup > Reporting Snapshots** > click **Edit** for the report you want to change e.g. Reporting Analytic Snapshot.



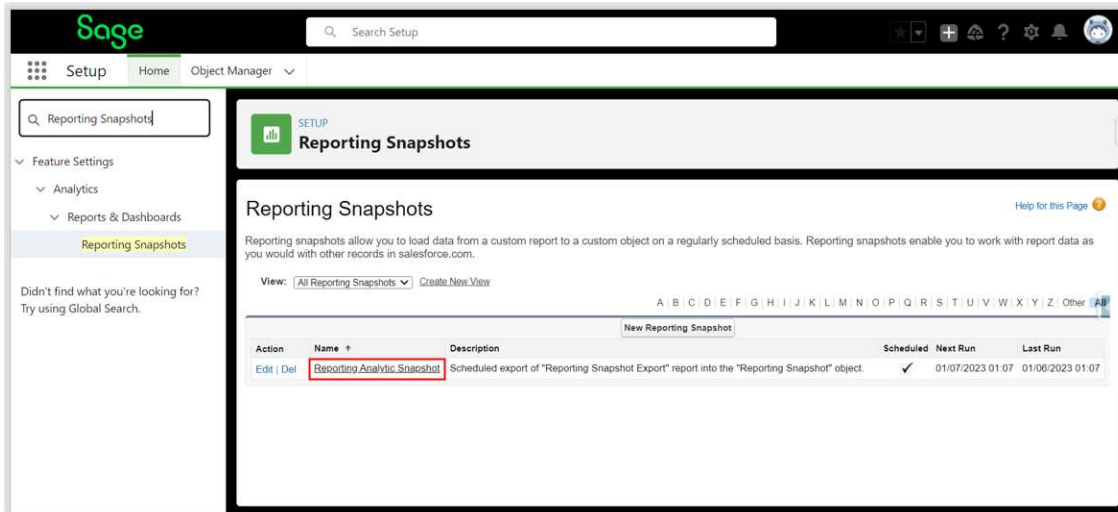
The screenshot shows the Sage 'Reporting Snapshots' page. The left sidebar has 'Setup' selected, and 'Reporting Snapshots' is highlighted in the search bar. The main content area is titled 'Reporting Snapshots' and contains a table of reporting snapshots. The 'Reporting Analytic Snapshot' is highlighted with a red box, and its 'Edit' button is also highlighted with a red box.

Action	Name	Description	Scheduled	Next Run	Last Run
Edit	Reporting Analytic Snapshot	Scheduled export of "Reporting Snapshot Export" report into the "Reporting Snapshot" object.	✓	01/07/2023 01:07	01/06/2023 01:07

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**.

Sage Search Setup

Setup Home Object Manager

Reporting Snapshots

Schedule Reporting Snapshot

Frequency	Preferred Start Time	Start Time	End Time
On day 1 of every month	01:00	01/03/2020	21/03/2050

Run History

Run Start Time	Source Report	Running User	Target Object	Total Run Time	Records Created in Target Object	Result
01/06/2023 01:07	Reporting Snapshot Export	People_Sage	Reporting Snapshot	0 minutes	77	Success
01/05/2023 01:07	Reporting Snapshot Export	People_Sage	Reporting Snapshot	0 minutes	77	Success
01/04/2023 01:07	Reporting Snapshot Export	People_Sage	Reporting Snapshot	0 minutes	77	Success
01/03/2023 01:07	Reporting Snapshot Export	People_Sage	Reporting Snapshot	0 minutes	75	Success
01/02/2023 01:07	Reporting Snapshot Export	People_Sage	Reporting Snapshot	0 minutes	75	Success
01/01/2023 01:07	Reporting Snapshot Export	People_Sage	Reporting Snapshot	0 minutes	74	Success
01/12/2022 01:07	Reporting Snapshot Export	People_Sage	Reporting Snapshot	0 minutes	74	Success
01/11/2022 01:07	Reporting Snapshot Export	People_Sage	Reporting Snapshot	0 minutes	73	Success
01/10/2022 01:07	Reporting Snapshot Export	People_Sage	Reporting Snapshot	0 minutes	72	Success

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**.

Schedule Reporting Snapshot

5 Save Cancel Unschedule Snapshot

Email Reporting Snapshot ☐ To me ☒ To others...

2 Search: Users for: Find

3 Select From

User: Manager Tester

Add

Remove

Send Email To

User: John Sheridan

Scheduled Run

4 Frequency

☐ Daily ☐ Weekly ☒ Monthly

☒ On day 1 of every month ☐ On the 1st Sunday of every month

Start 01/03/2020 [12/06/2023]

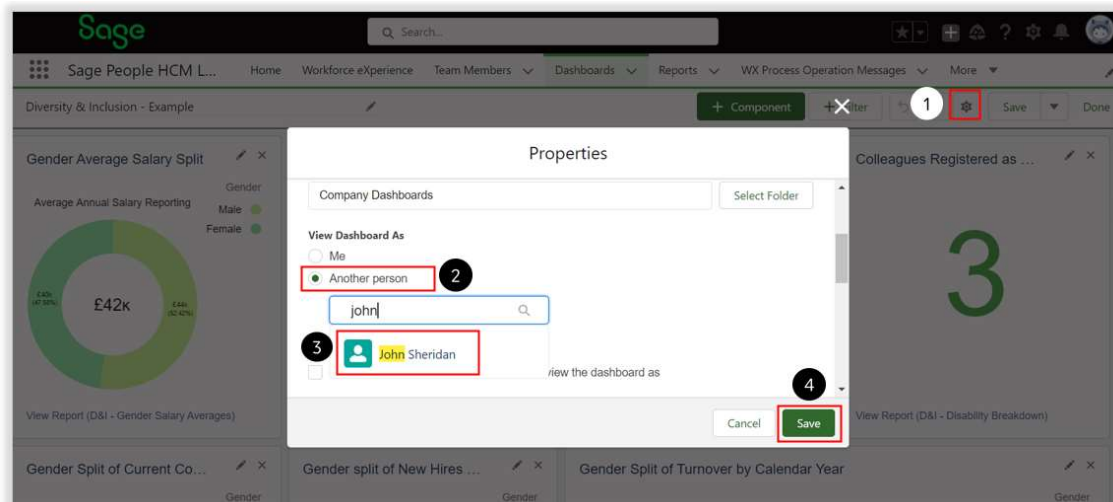
End 21/03/2050 [12/06/2023]

Preferred Start Time 00:00

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**.



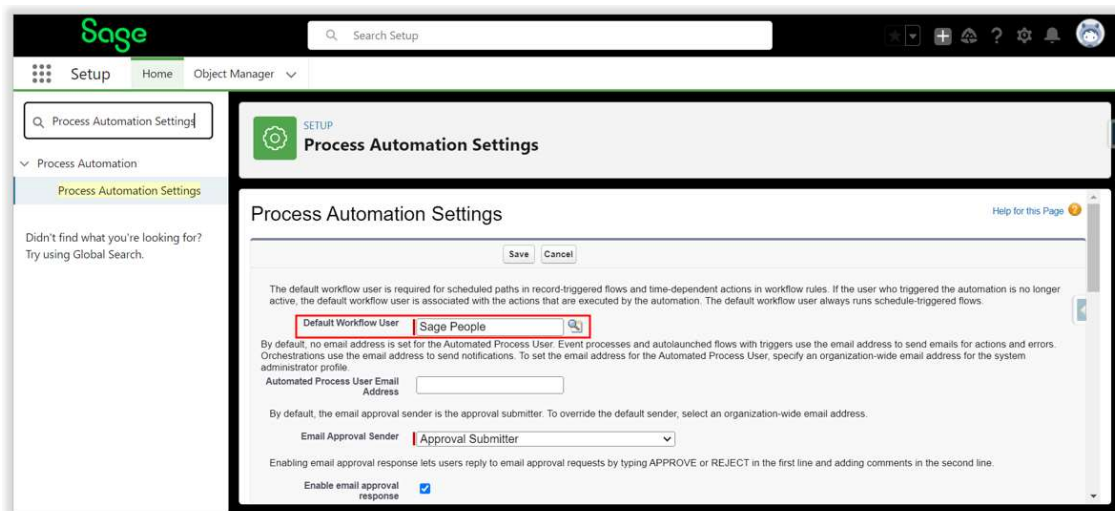
Workflow Actions

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.

SETUP Email Alerts

All Email Alerts

Email alerts are the emails that workflow rules send when triggered.

View: [All Email Alerts](#) [Edit](#) [Create New View](#)

Action	Description	Email Template Name	Object	From Email Address	Last Modified Date
Edit Del	5-Day Absence Alert	5-Day Absence Alert	Absence	Current User	22/11/2022
Edit	Advise of interview change	Interview Changed	Application	Current User	22/11/2022
Edit	Ask for a Reference	Reference Request Prior Employer	Reference	Current User	22/11/2022
Edit Del	China Absence Alert	China Absence Alert	Absence	Current User	22/11/2022
Edit	Email candidate	Interview Invitation	Candidate	Current User	22/11/2022
Edit Del	Email Manager for Termination	Manager end of first month	Employment Record	Current User	22/11/2022
Edit Del	First month email	Manager end of first month	Team Member	Current User	22/11/2022
Edit Del	First week email	Manager end of first week	Team Member	Current User	22/11/2022

- 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.

SETUP Field Updates

All Workflow Field Updates

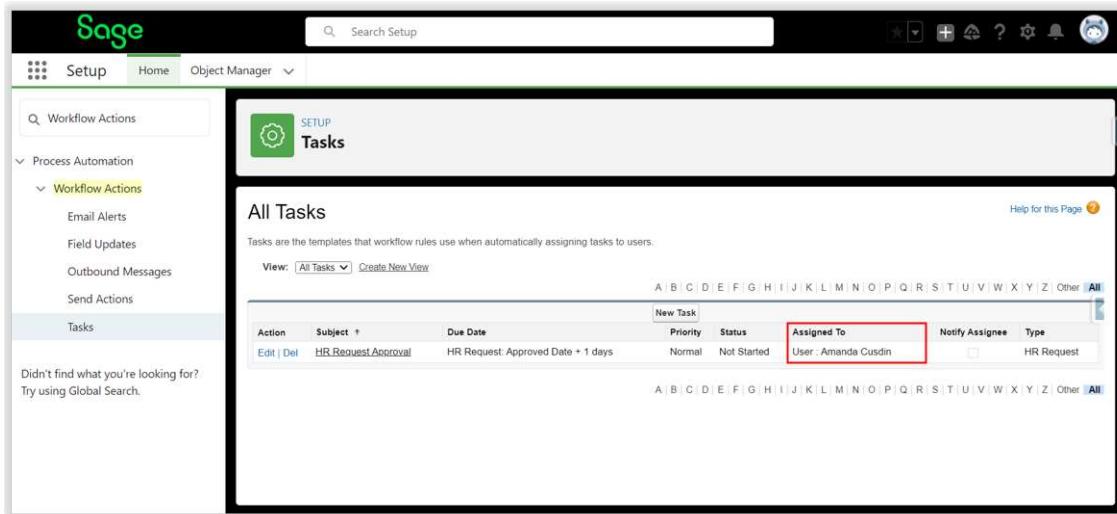
Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View: [All Workflow Field Updates](#) [Edit](#) [Create New View](#)

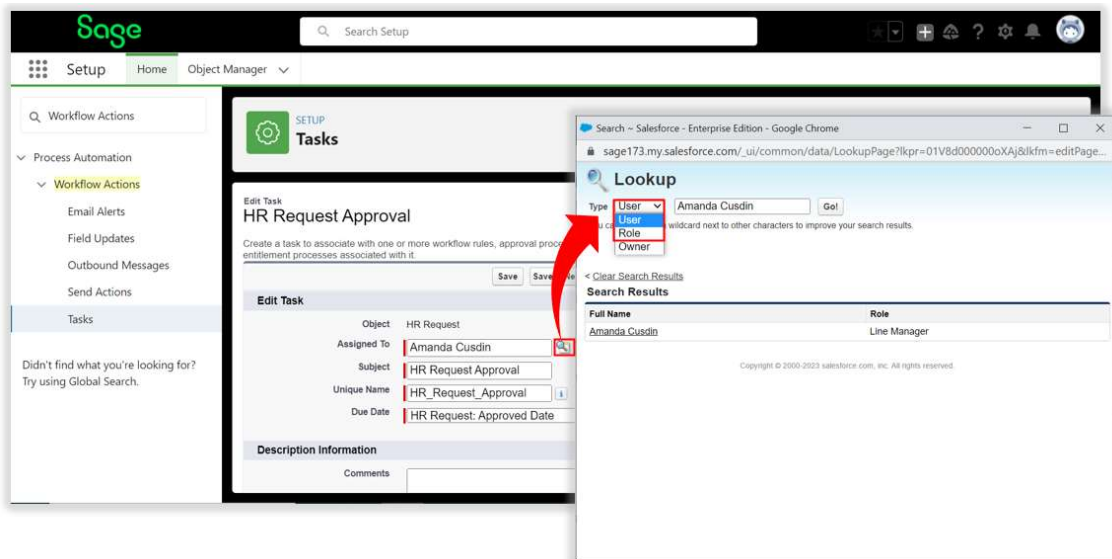
Action	Name	Field to Update	Operation	Value	Last Modified Date
Edit Del	Cell from Mobile	Team Member: Cell Number	Formula	hCM2_Mobile_Number__c	22/11/2022
Edit Del	Cell from Mobile/Cell	Team Member: Cell Number	Formula	Mobile_Cell__c	22/11/2022
Edit Del	Cell/Mobile from Mobile	Team Member: Mobile/Cell	Formula	hCM2_Mobile_Number__c	22/11/2022
Edit Del	Changes the case priority to high	Case: Priority	Value	High	22/11/2022
Edit Del	Clear is being approved	Performance Review: Is Being Approved	Value	False	22/11/2022
Edit Del	Clear Rejected	HR Request: Rejected Date	Null		22/11/2022
Edit Del	Clear Submitted	HR Request: Submitted Date	Null		22/11/2022
Edit Del	Clear Submitted Date	Application: Submitted Date	Null		22/11/2022
Edit Del	Clear Submitted Date	Vacancy: Submitted Date	Null		22/11/2022

- Tasks

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.

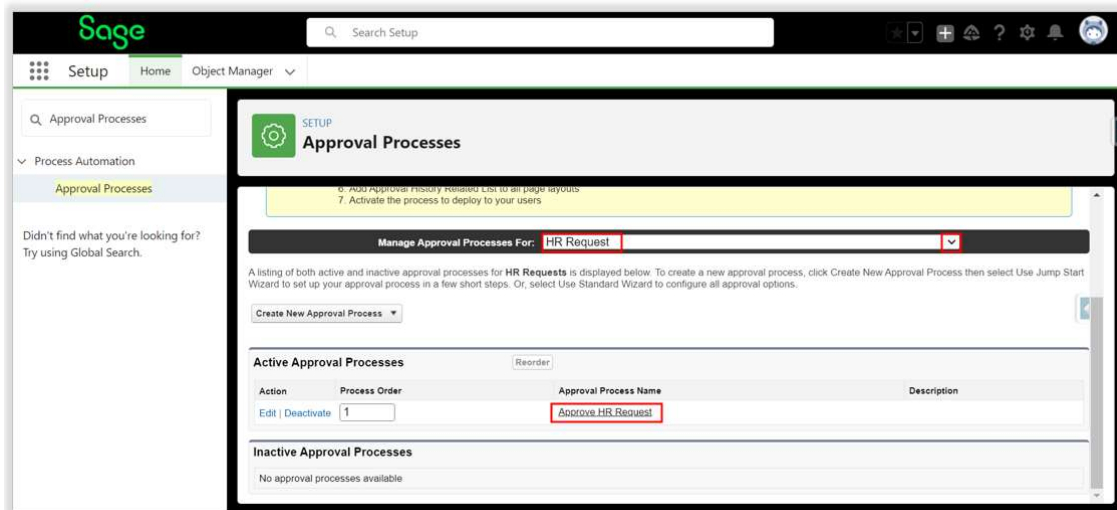
The screenshot shows the Sage HR system interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has a search bar and a 'Process Automation' section with 'Workflow Rules' highlighted. The main content area is titled 'Workflow Rules' and contains a table of rules. The table has columns for 'Action', 'Rule Name', 'Description', 'Object', and 'Active'. The 'Active' column is highlighted with a red box, showing checkboxes for each rule. The rules listed are:

Action	Rule Name	Description	Object	Active
Edit Del Activate	5-Day Absence Alert	Notifies HR if an Absence is 5-days or greater.	Absence	☐
Edit Del Activate	China Absence Alert	Alert to HR if Absence exceeds more than 12-days in a 12-month period.	Absence	☐
Edit Del Deactivate	Home Address Post or Zip update	Update of Home Address Postal Code and Home Address Zip Code fields from the Home Address Postal or Zip Code fields	Team Member	☒
Edit Del Deactivate	Home Address Postal Code Update	Update of Home Address Postal or Zip Code field and Home Zip Code field from Home Address Postal Code field	Team Member	☒
Edit Del Deactivate	Home Address Zip Code Update	Update of Home Address Postal Code and Home Address Postal or Zip Code fields from the Home Address Zip Code field	Team Member	☒
Edit Del Deactivate	Home County Update	Update of Region and State from County	Team Member	☒
Edit Deactivate	Interviewer Assessment		Interviewer Assessment	☒
Edit Del Deactivate	Nat Insurance Field Update	Update of the Social Security Number and NI or SS Number fields using the National Insurance Number	Team Member	☒

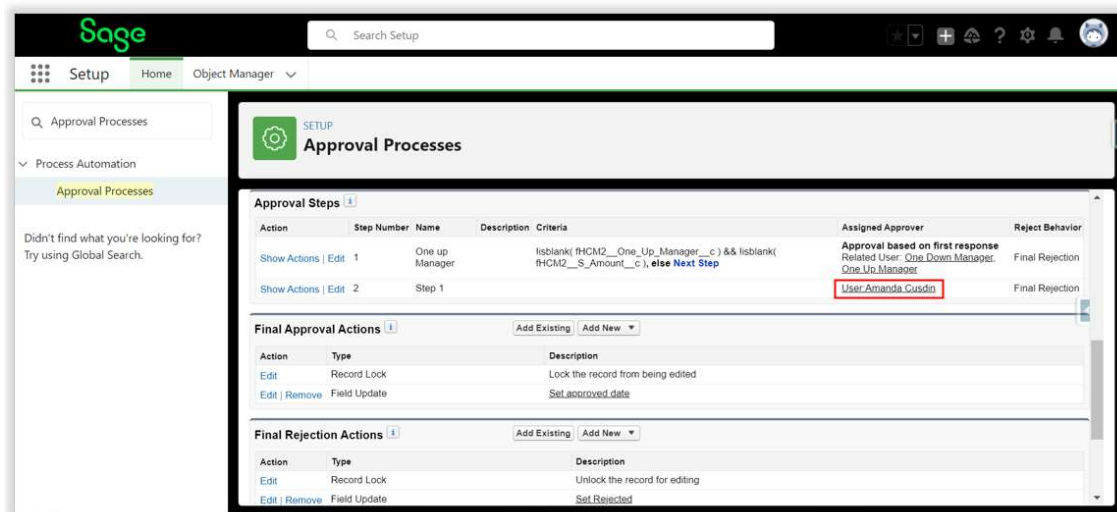
Approval Processes

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.

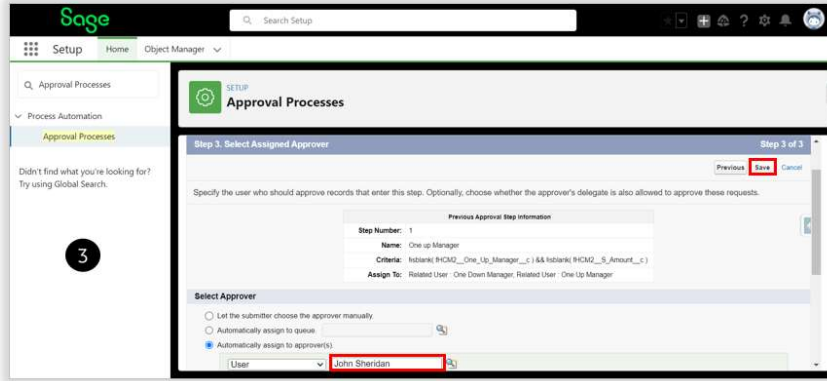
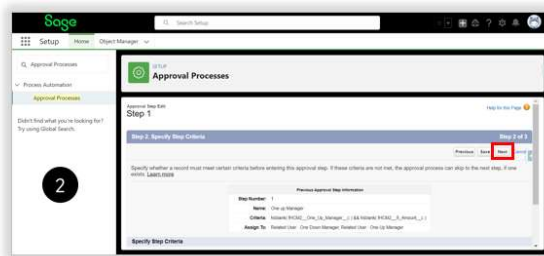
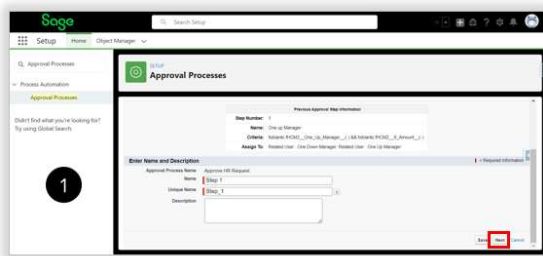
Go to **Setup > Approval Processes > Manage Approval Processes For:** select the required process e.g. **HR Requests** > in the **Active Approval Processes** section, click on the link of **the Approval Process Name** i.e. Approve HR Request



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.



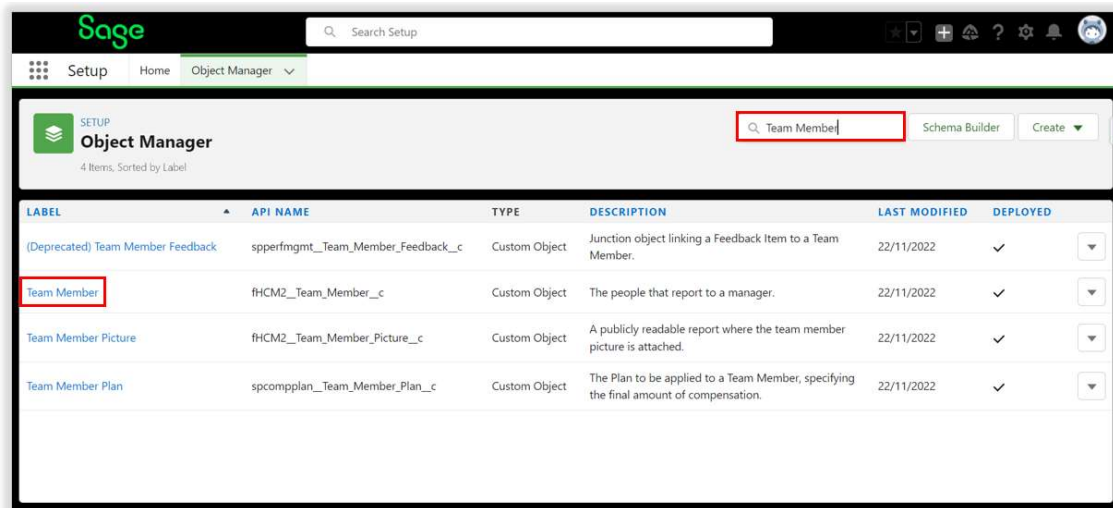
Click **Edit** > there are 3 screens/steps to move through, click **Next, Next** and on the 3rd screen, change the **Assigned Approver** > click **Save**. Go back to the **Manage Approval Process For:** list to check the next process and repeat.



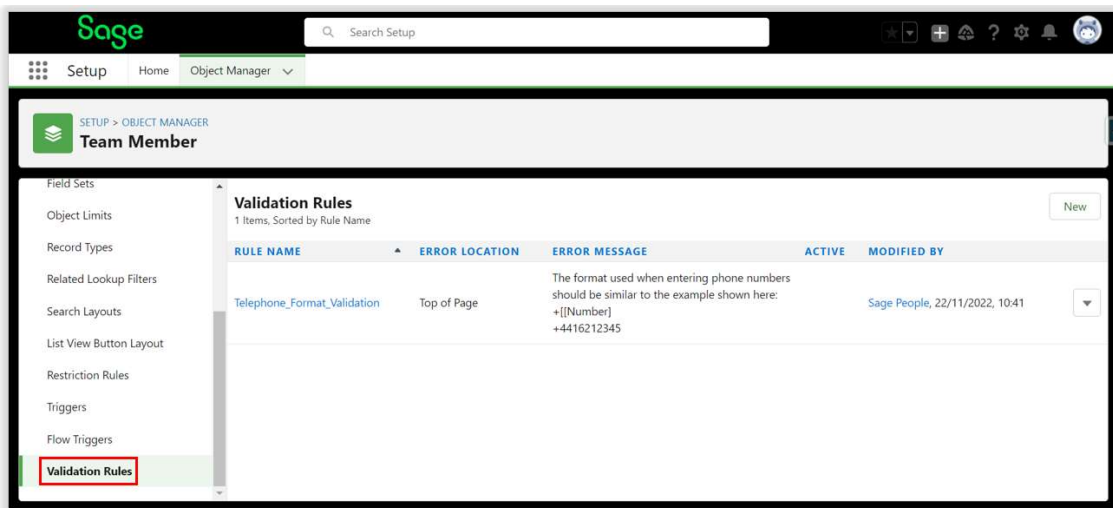
Validation Rules

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.

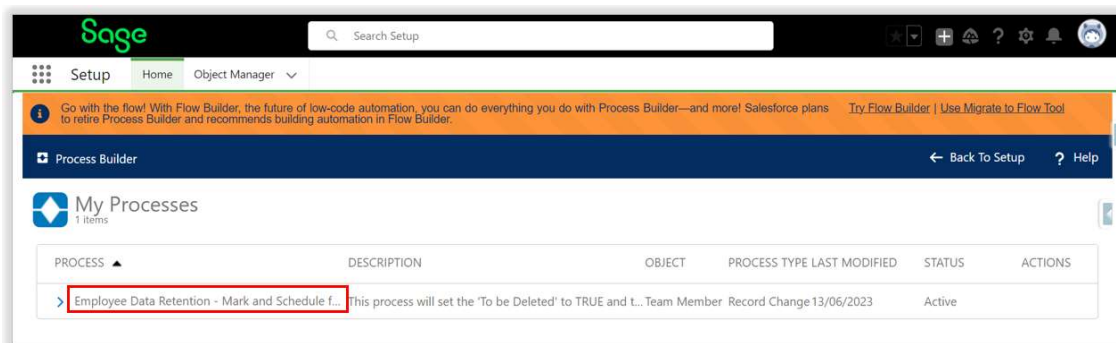
Process Builder and Flows

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.

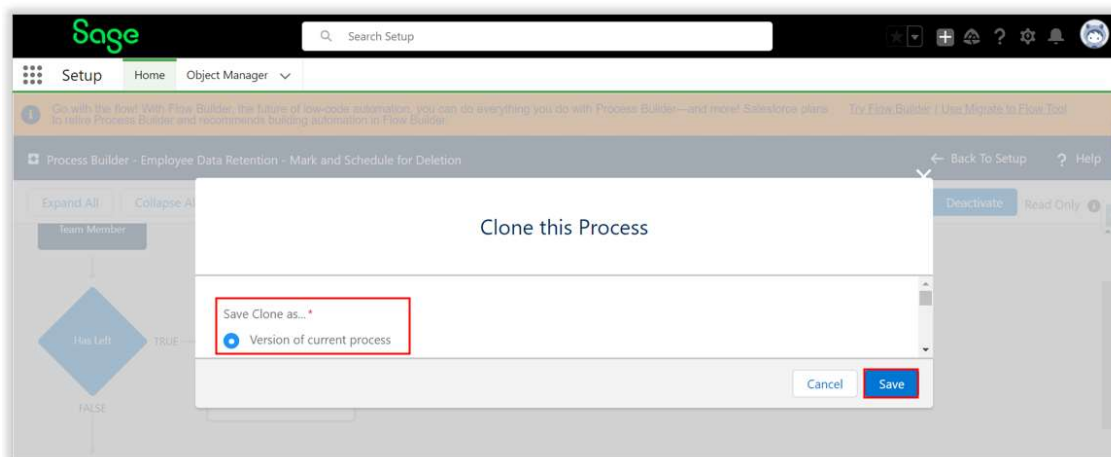
Process Builder has been replaced with Flows and in time this functionality will be deprecated. Any Process Builder that is currently Active will remain Active for now (these will need to be migrated to Flows over time). Active Process Builders cannot be edited, if you find reference to the leaving System 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.

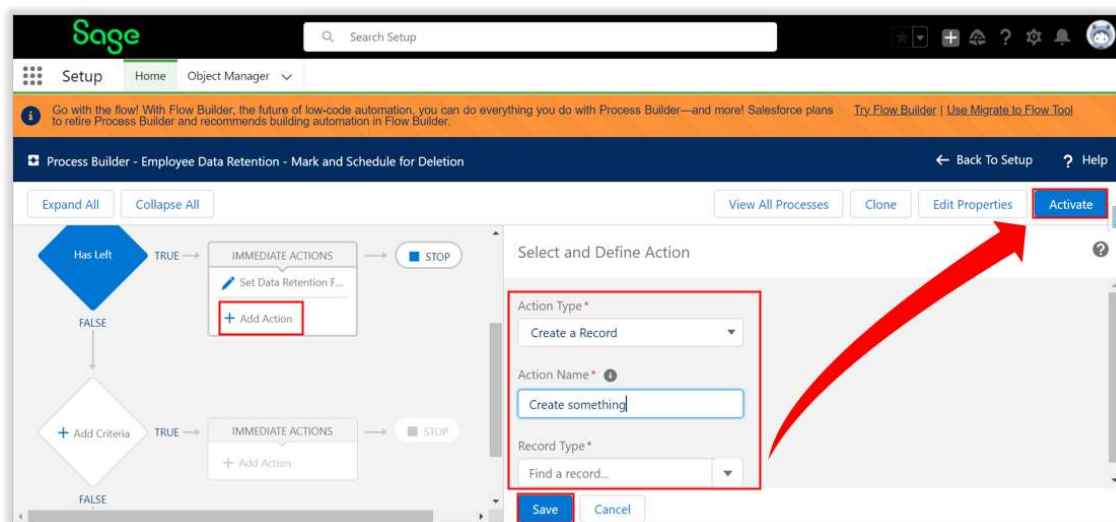
Go to **Setup > Process Builder** > click on the **Process** link.



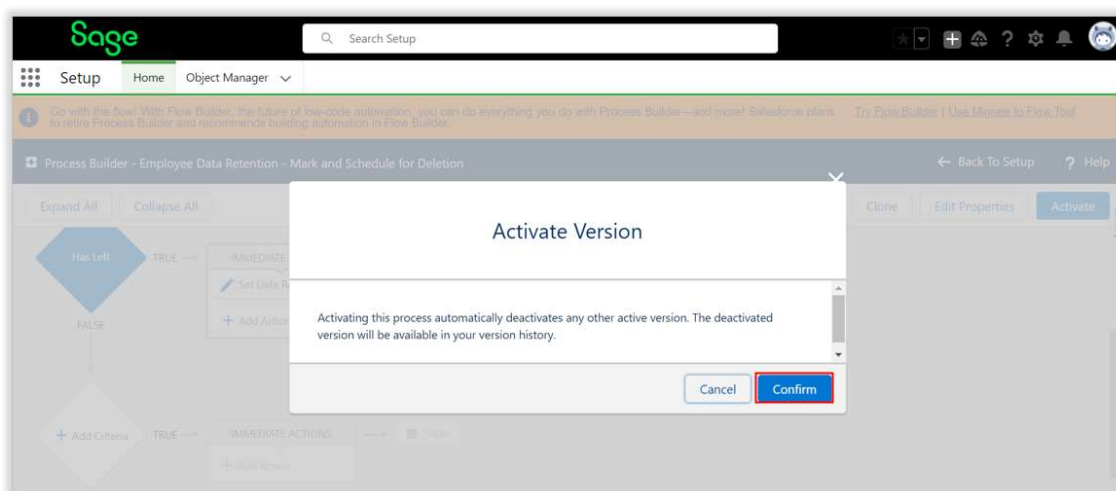
Check all **Immediate Actions** steps in the process flow to ensure that there is no reference to the leaving System Administrator. If you find any references to the leaving System Administrator, click **Clone**. The **Save Clone as...** defaults to **Version of current process** > click **Save**.



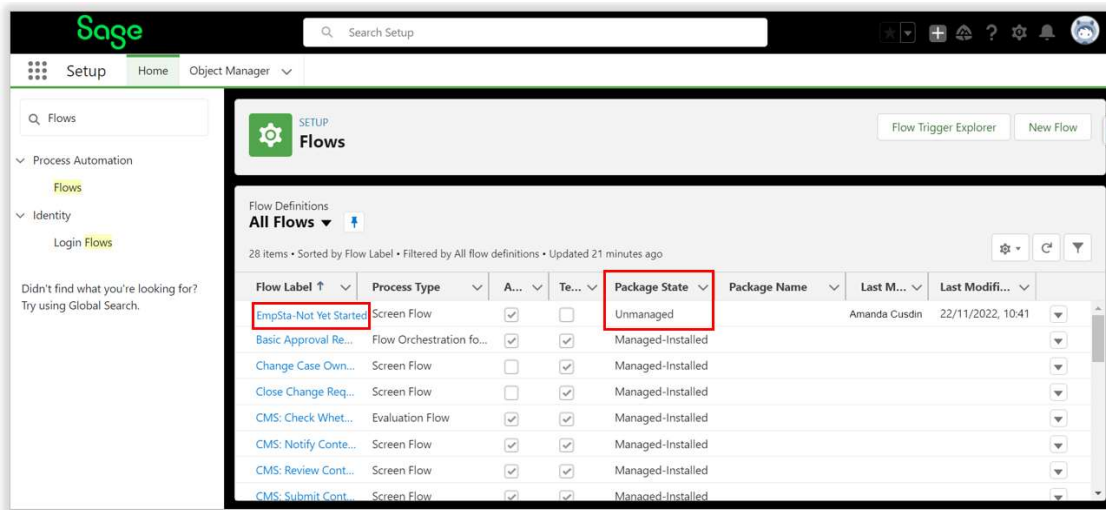
Make all required changes > **Save** the changes and then click **Activate**.



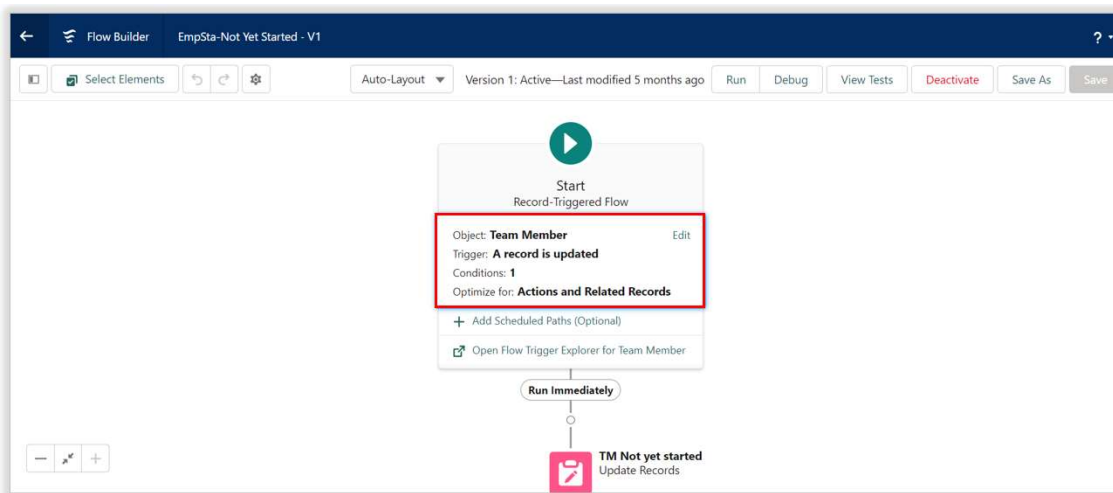
Activating the process will automatically deactivate the other active version, click **Confirm**. The deactivated version can be viewed in your version history should you need to refer to it.



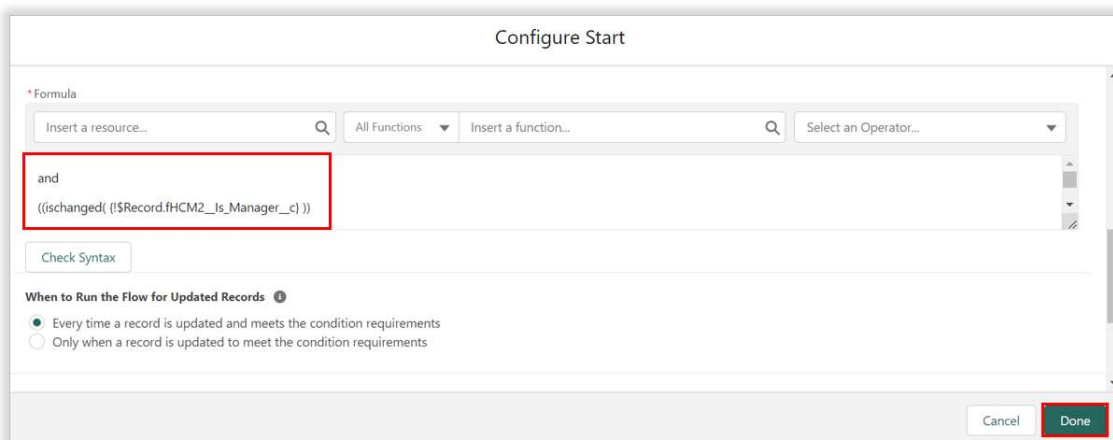
To check if the leaving System Administrator is referenced in any Flows, go to **Setup > Flows > show All Flows** > click on the **Package State** column header to group the Flows to show **Unmanaged vs. Managed-Installed**; you should check all **Unmanaged** Package State Flows > click the **Flow Label**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



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

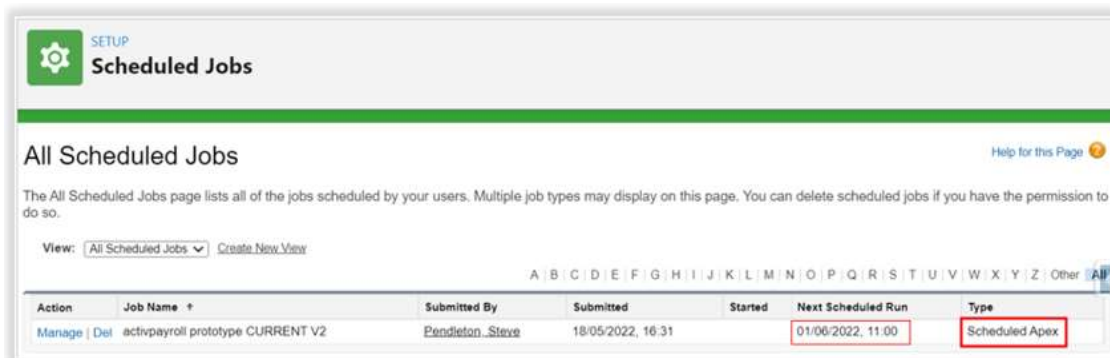


The **Configure Start** screen appears, check that there is no reference to the leaving System Administrator > in the unlikely event that you find a reference, make the change(s) > click **Done**. Repeat the steps for all active Flows.



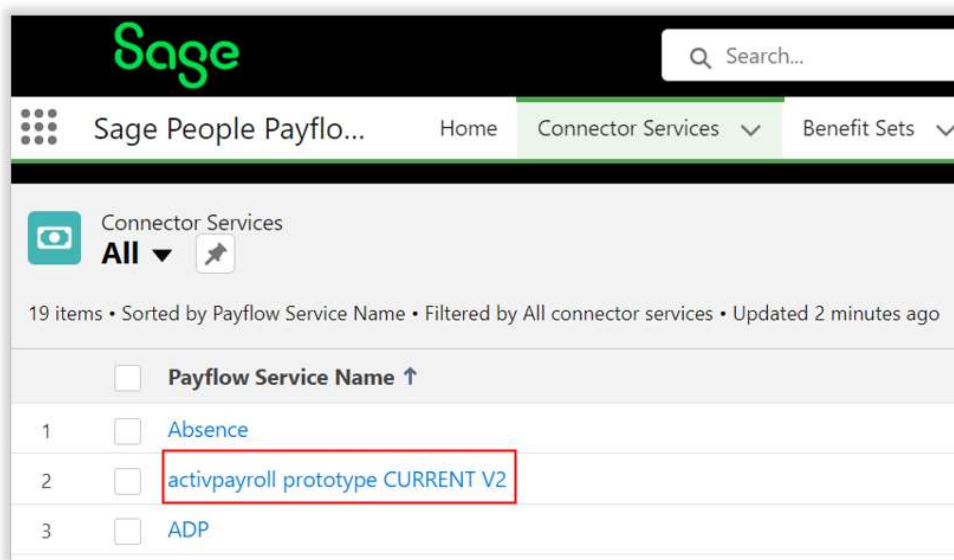
Scheduled Payflows

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.



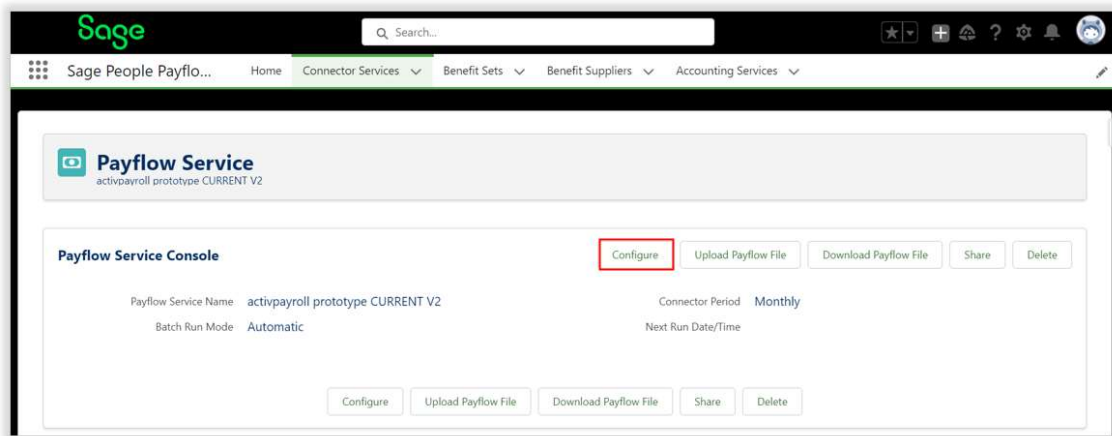
Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage Delete	activpayroll prototype CURRENT V2	Pendleton, Steve	18/05/2022, 16:31		01/06/2022, 11:00	Scheduled Apex

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.

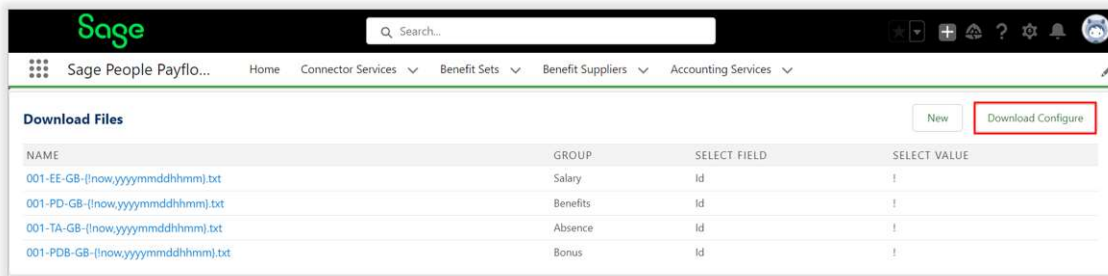


	Payflow Service Name
1	Absence
2	activpayroll prototype CURRENT V2
3	ADP

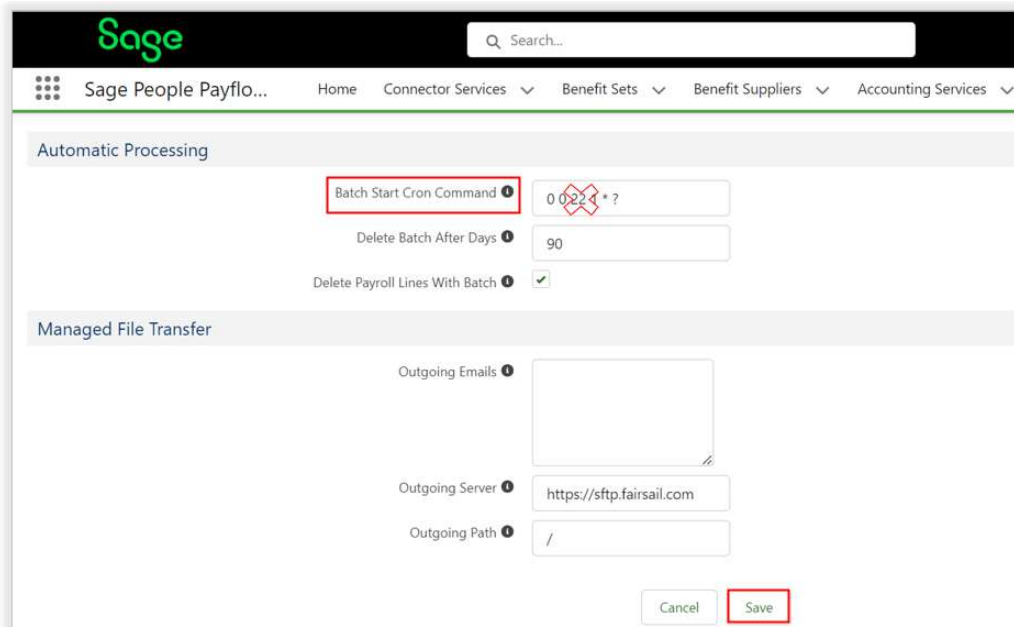
Click **Configure**.



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 **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**.

The screenshot shows the Sage People Payflow configuration interface. The top navigation bar includes the Sage logo, a search bar, and links to Home, Connector Services, Benefit Sets, Benefit Suppliers, and Accounting Services. The main content area is divided into two sections: 'Automatic Processing' and 'Managed File Transfer'. In the 'Automatic Processing' section, the 'Batch Start Cron Command' is set to '0 0 22 1 * ?', 'Delete Batch After Days' is set to '90', and 'Delete Payroll Lines With Batch' is checked. In the 'Managed File Transfer' section, the 'Outgoing Emails' field is highlighted with a red box and contains the email address 'Supplier@Test.com'. The 'Outgoing Server' is set to 'https://sftp.fairsail.com' and the 'Outgoing Path' is set to '/'. At the bottom right of the 'Managed File Transfer' section, the 'Save' button is highlighted with a red box.

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**.

The image shows two screenshots of the Payflow Services table. The top screenshot shows the table with three rows: 'Absence Report', 'Changes Only', and 'Deleted Absences'. The 'Send Reports To' column for each row has a search box and a pencil icon. The bottom screenshot shows the same table, but the 'Send Reports To' column now displays the name 'John Sheridan' for all three rows. A red arrow points from the top screenshot to the bottom one, indicating the change.

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**.

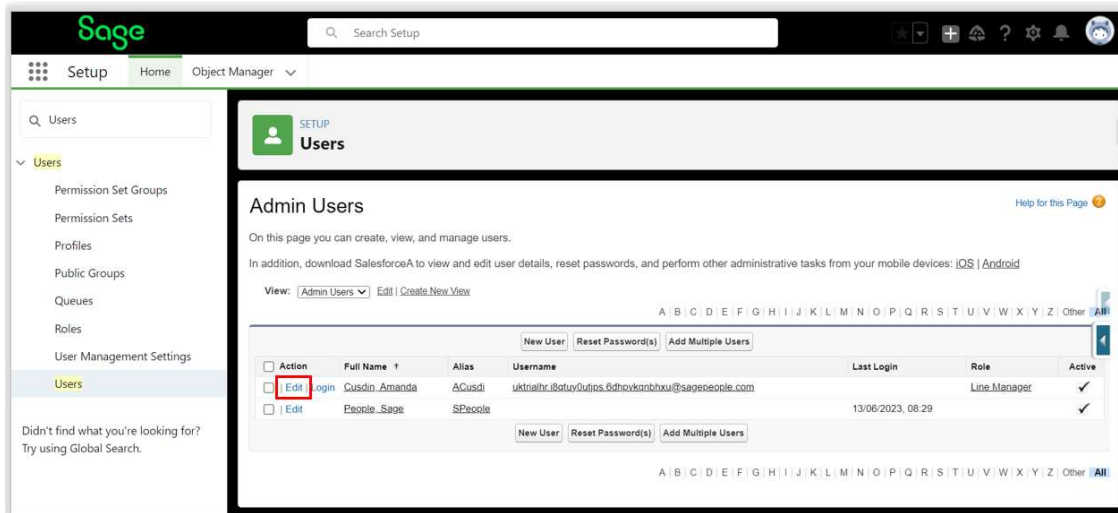
The screenshot shows the Sage 'Company Information' setup page. The left sidebar contains a search bar and a list of settings, with 'Company Information' selected. The main content area displays the organization's profile for 'Sage'. The 'Organization Detail' section includes an 'Edit' button and a table of fields. The 'Primary Contact' field, with the value 'Steve Pendleton', is highlighted by a red rectangular box. Other fields include Organization Name (Sage), Division, Address (GB), Fiscal Year Starts In (January), Activate Multiple Currencies, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Phone, Fax, Default Locale (English (United Kingdom)), Default Language (English), Default Time Zone ((GMT+01:00) British Summer Time (Europe/London)), Improve DATEVALUE() accuracy for DST, Currency Locale (English (United Kingdom) - GBP), Used Data Space (388.2 MB (4%) [View]), and Used File Space (93.5 MB (9%) [View]).

Organization Detail		Phone	Fax
Organization Name	Sage		
Primary Contact	Steve Pendleton		
Division		Default Locale	English (United Kingdom)
Address	GB	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+01:00) British Summer Time (Europe/London)
Activate Multiple Currencies	☐	Improve DATEVALUE() accuracy for DST	☐
Newsletter	☐	Currency Locale	English (United Kingdom) - GBP
Admin Newsletter	☒	Used Data Space	388.2 MB (4%) [View]
Hide Notices About System Maintenance	☒	Used File Space	93.5 MB (9%) [View]

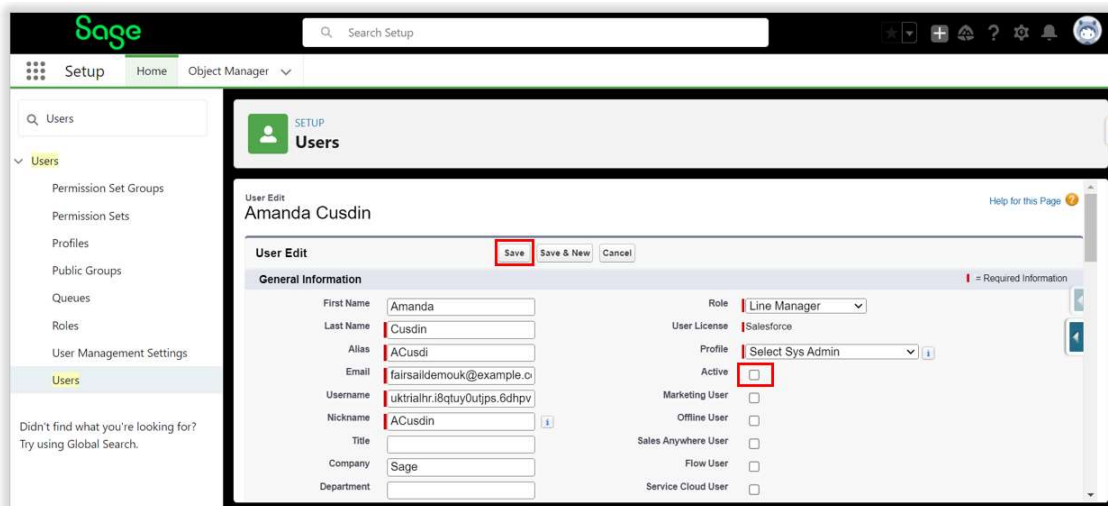
Deactivate the leaving System Administrator User record

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:

Error: Invalid Data.
Review all error messages below to correct your data.

Role: <None Specified> v

User License: Salesforce v

Profile: System Administrator v

Active: ☒

Error: This user is the default owner of records created by guest users and can't be deactivated.

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**.

Site Detail Edit Public Access Settings Login Settings URL Redirects Deactivate Update Guest User Licensing

Site Label	Forms	Site Name	Forms
Site Type	Guest	Site Description	
Site Contact	Cusdin, Amanda	Active	☒
Login	Not Allowed	Active Site Home Page	fHCM2 Form [Preview]
Site Favorite Icon		Inactive Site Home Page	InMaintenance [Preview]
Site Robots.txt		Site Template	SiteTemplate [Preview]
Enable Feeds	☐	Analytics Tracking Code	
URL Rewriter Class		Clickjack Protection Level	Allow framing by any page (No protection)
Lightning Features for Guest Users	☐	Enable Content Sniffing Protection	☐
Enable Browser Cross Site Scripting Protection	☐	Referrer URL Protection	☐
Allow only required cookies for this site	☐	Guest Access to the Support API	☐
Default Record Owner	Cusdin, Amanda	Redirect to custom domain	☐
Cache public Visualforce pages	☒		

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

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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