How to terminate an employee in SuccessFactors with manager approval

This guide explains how to terminate an employee in SuccessFactors using an approval workflow. You review the termination workflow, create a business rule that triggers it for the termination reason "Resignation - No Growth," and assign the rule to the Job Information Model. You then terminate an employee, approve the request as the manager, and verify the result.

Prerequisites

Before you begin, make sure you have the following:

- Access to the **Admin Center**, including **Manage Organization, Pay and Job Structures**, **Configure Business Rules**, and **Manage Business Configuration**.
- A workflow named **termination wf** (you review it in step 1).
- The termination reason **Resignation - No Growth (TERTVTERM)** available in your system.
- Access to the profile of the employee you want to terminate.
- Permission to proxy as the employee's manager, so you can approve the request.

Set up the termination workflow and business rule

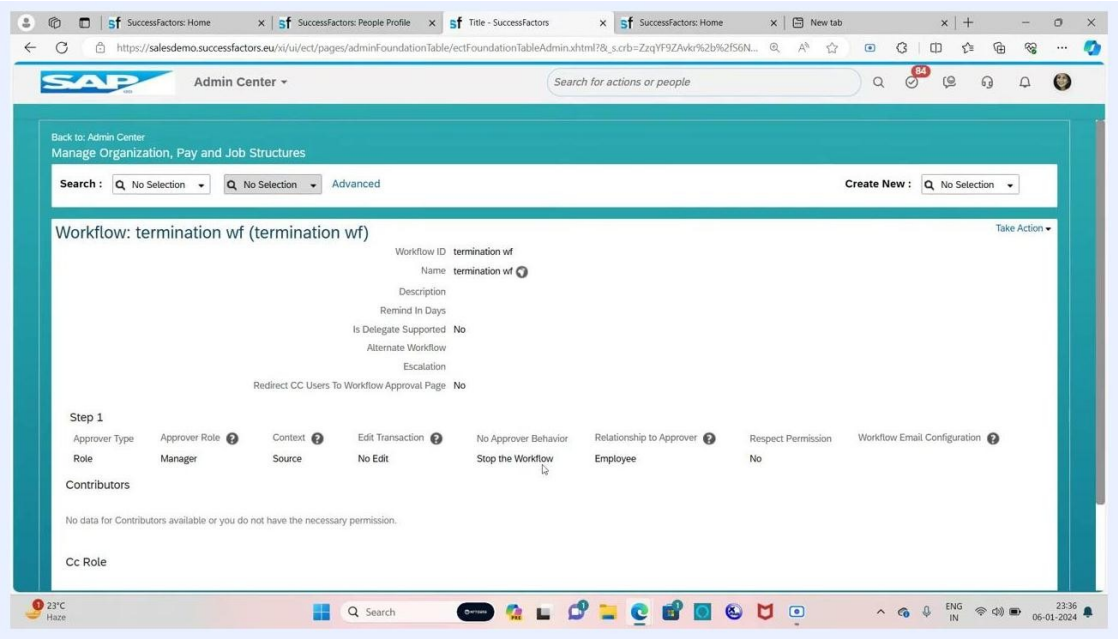
Step 1: Review the termination workflow configuration

1. Go to the **Admin Center** and open **Manage Organization, Pay and Job Structures**.
2. Locate the workflow named **termination wf**.
3. Confirm these settings:

    - **Workflow ID:** termination wf
    - **Name:** termination wf
    - **Approver Role:** Manager
    - **Context:** Source
    - **Edit Transaction:** No Edit
    - **No Approver Behavior:** Stop the Workflow

- **Relationship to Approver:** Employee
- **Respect Permission:** No
- **Workflow Email Configuration:** as set up by your organization

4. Make sure the employee's manager is the approver and that the workflow stops if the request isn't approved.



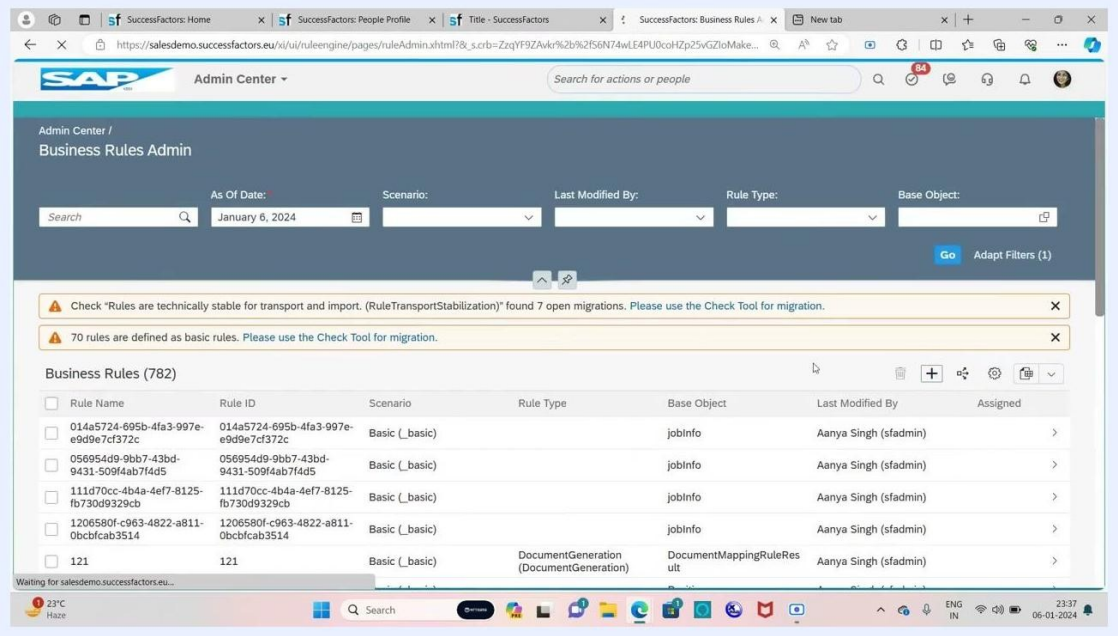
Workflow configuration screen showing the termination wf workflow with the manager as approver and the workflow stopping if not approved

With this configuration, every termination for the specified reason requires explicit manager approval before it is finalized.

Step 2: Open Configure Business Rules

1. On the SAP SuccessFactors home page, click the search bar at the top.
2. Type **configure business rule**.

3. Select **Configure Business Rules** from the dropdown.



SAP SuccessFactors home page with the search bar open and the Configure Business Rules option highlighted

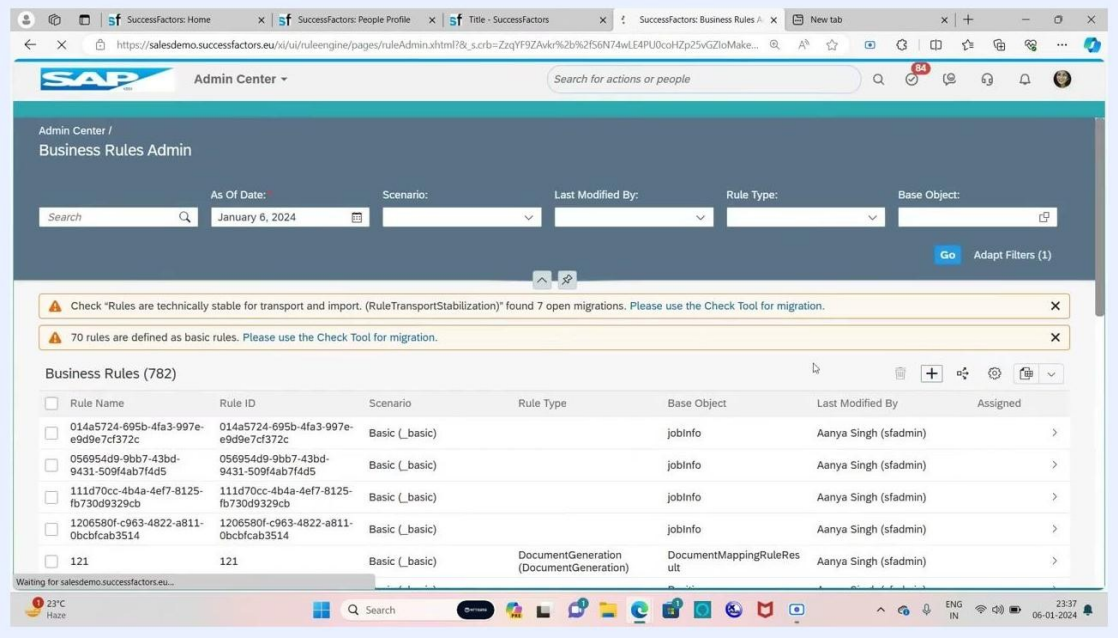
The **Business Rules Admin** page opens. You can view, create, and manage business rules here. Review the list of existing rules to confirm you are in the right place to create a rule.

Step 3: Start a new business rule

1. Click the **plus (+) icon** or the option to create a new rule.
2. Enter the following values:

    - **Rule Name:** termination br
    - **Rule ID:** leave blank or auto-generate
    - **Start Date:** 01/01/1900
    - **Rule Type:** No Selection (leave the default for now)
    - **Base Object: Job Information Model (recommended)**

3. Click **Continue**.



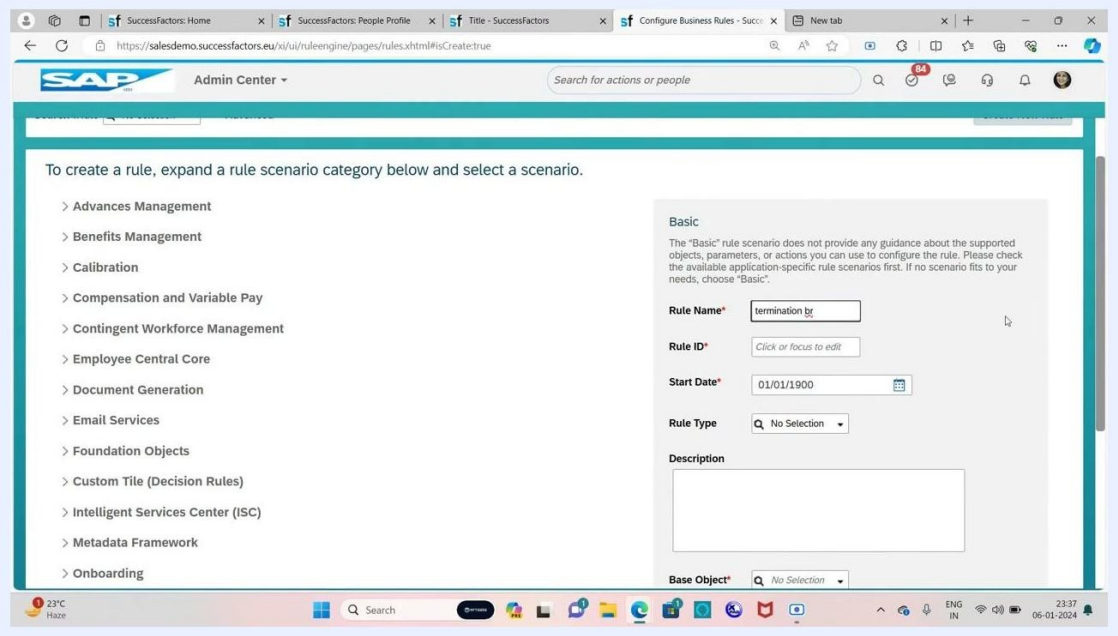
Business rule creation screen with termination br entered as the rule name and Job Information Model selected as the base object

Step 4: Define the rule condition

In the rule editor, set up the **If** condition:

1. Select **Job Information Model (recommended).Event Reason.Value**.
2. Set the operator to **is equal to**.

3. Use the dropdown to search for and select **Resignation - No Growth (TERTVTERM)**.



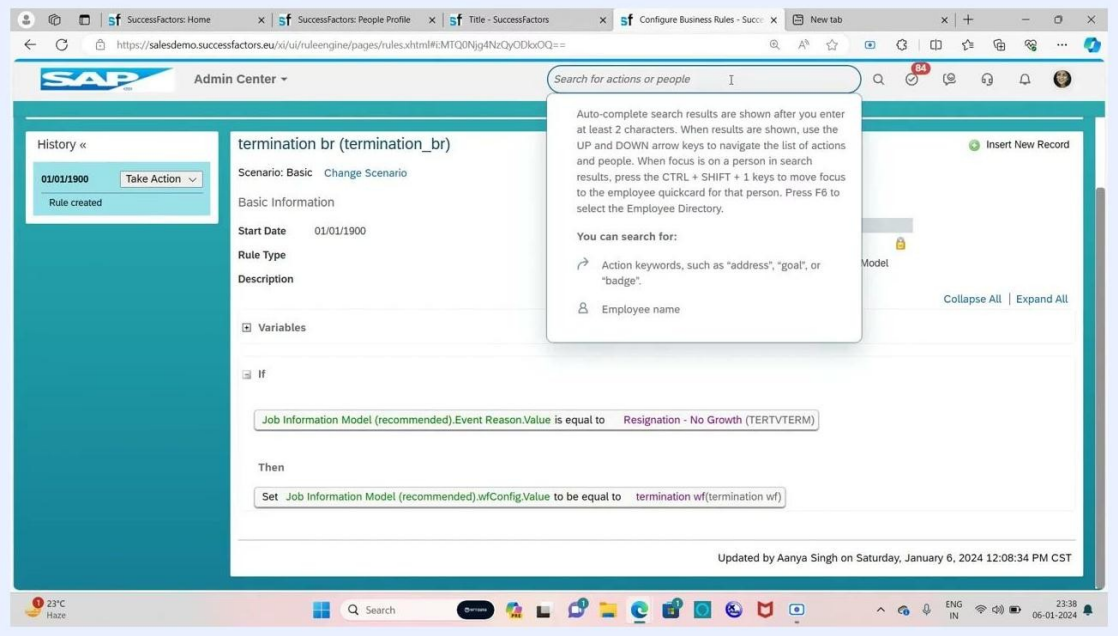
Rule editor with the condition Event Reason.Value is equal to Resignation - No Growth being configured

Step 5: Set the workflow in the Then section

In the **Then** section, configure the action:

1. Set **Job Information Model (recommended).wfConfig.Value**.
2. Choose **to be equal to**.

3. Select **termination wf (termination wf)**.



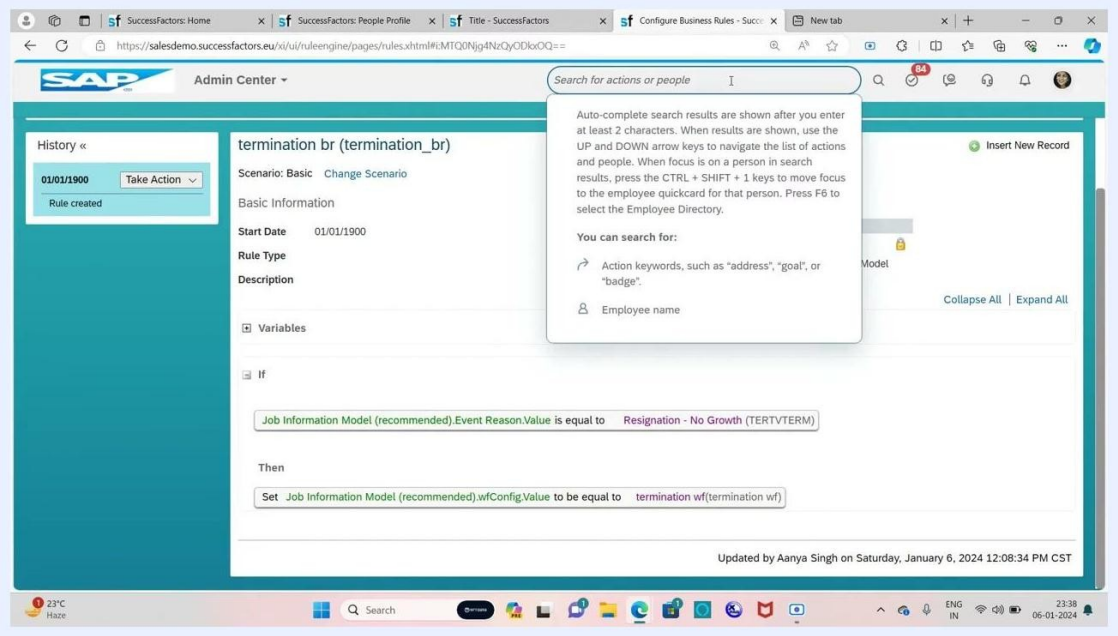
Rule editor showing wfConfig.Value set to be equal to termination wf for the specified event reason

This ensures the workflow is triggered when the event reason is "Resignation - No Growth."

Step 6: Save the business rule

1. Review the rule summary:
    - **If:** Job Information Model (recommended).Event Reason.Value is equal to Resignation - No Growth (TERTVTERM)
    - **Then:** Set Job Information Model (recommended).wfConfig.Value to be equal to termination wf (termination wf)
2. Click **Save**.

3. Confirm that the rule appears in the list and shows the correct user as the one who updated it.

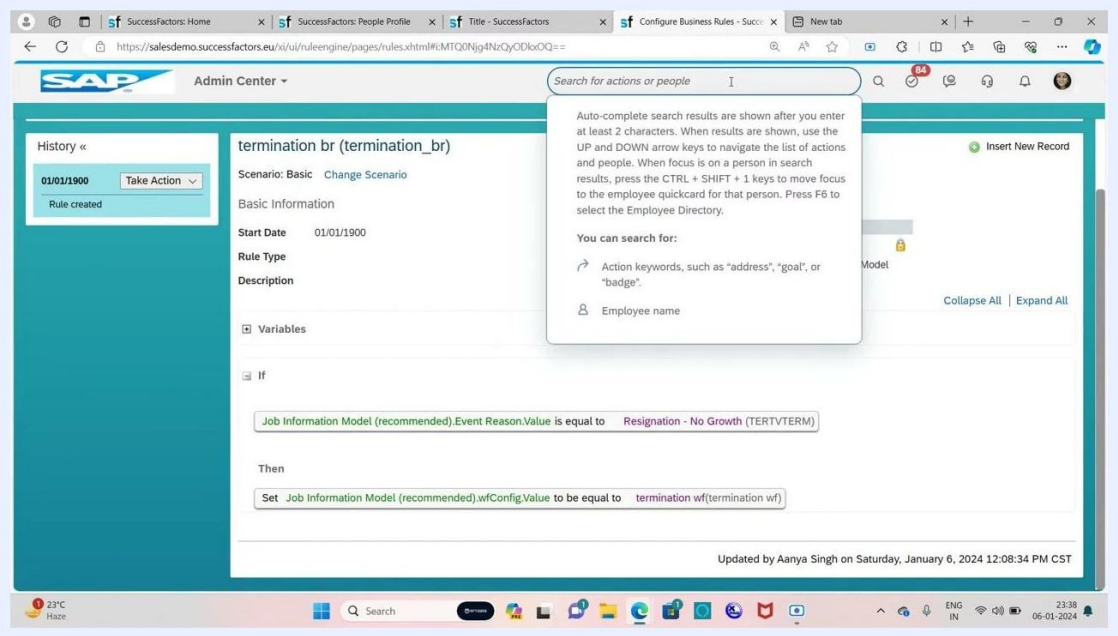


Saved business rule summary showing the condition and action for Resignation - No Growth

Assign the rule to the Job Information Model

Step 7: Open Manage Business Configuration

Use the search bar to go to **Manage Business Configuration**. This is where you assign the new business rule to the Job Information Model.

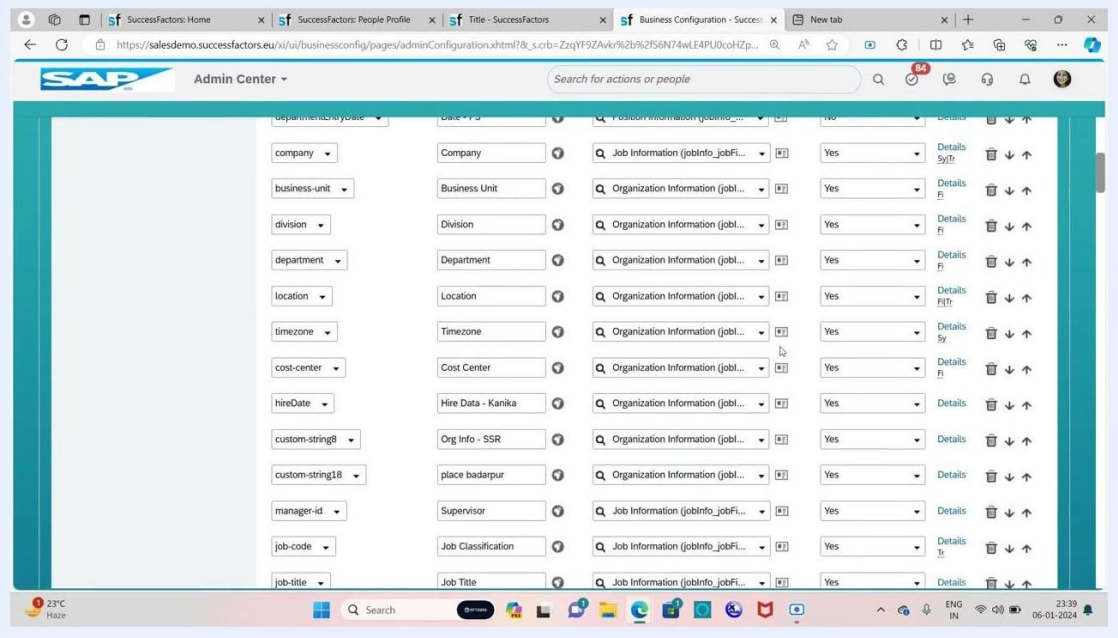


Business rule summary with the search bar open, ready to navigate to Manage Business Configuration

Step 8: Open Job Information in HRIS Elements

1. In the **Admin Center**, under **Employee Central**, expand **HRIS Elements**.

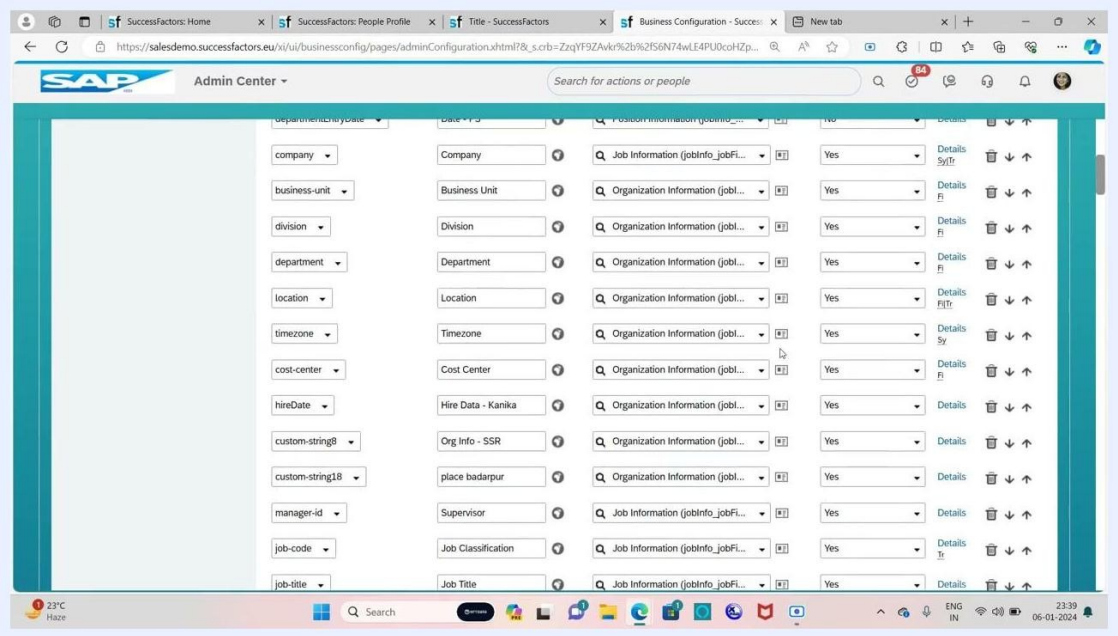
2. Select **jobInfo** (Job Information) from the list.



Admin Center with Employee Central, HRIS Elements, and jobInfo selected, showing the Job Information fields

Step 9: Find the rule assignment area

Scroll through the Job Information configuration screen to the section where business rules are assigned. Review the fields and their associated rules to make sure you are in the correct area.

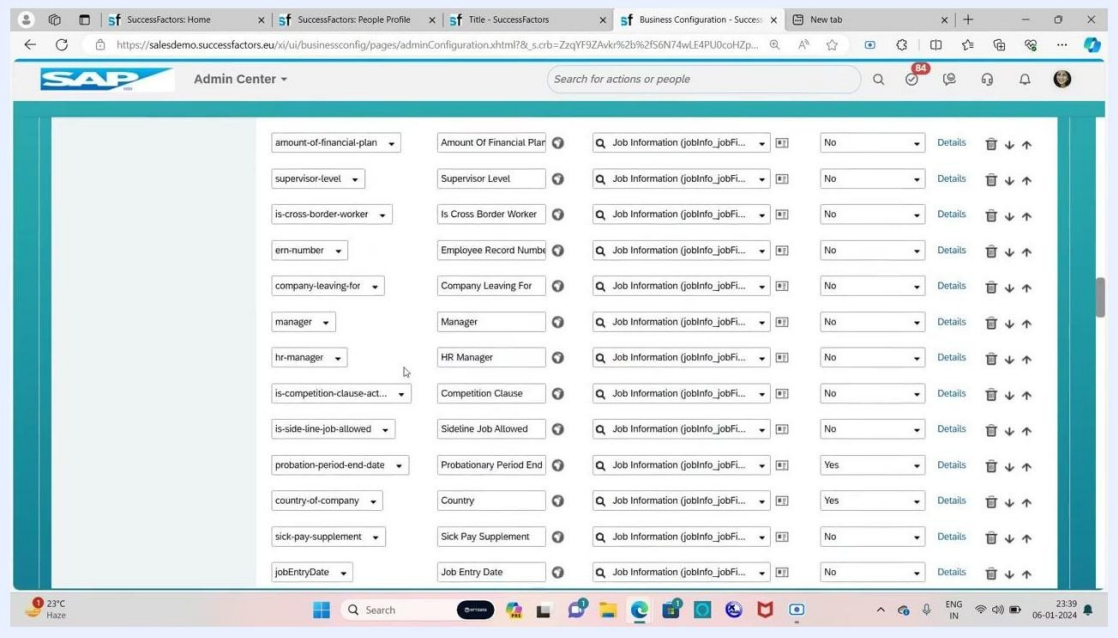


Business Configuration screen showing Job Information fields and rule assignment dropdowns

Step 10: Assign the termination business rule

1. In the **Job Information Model** section, locate the row for rule assignment.
2. In the dropdown under the **onSave** column, type **term**.

3. Select **termination br (termination_br)** from the list.

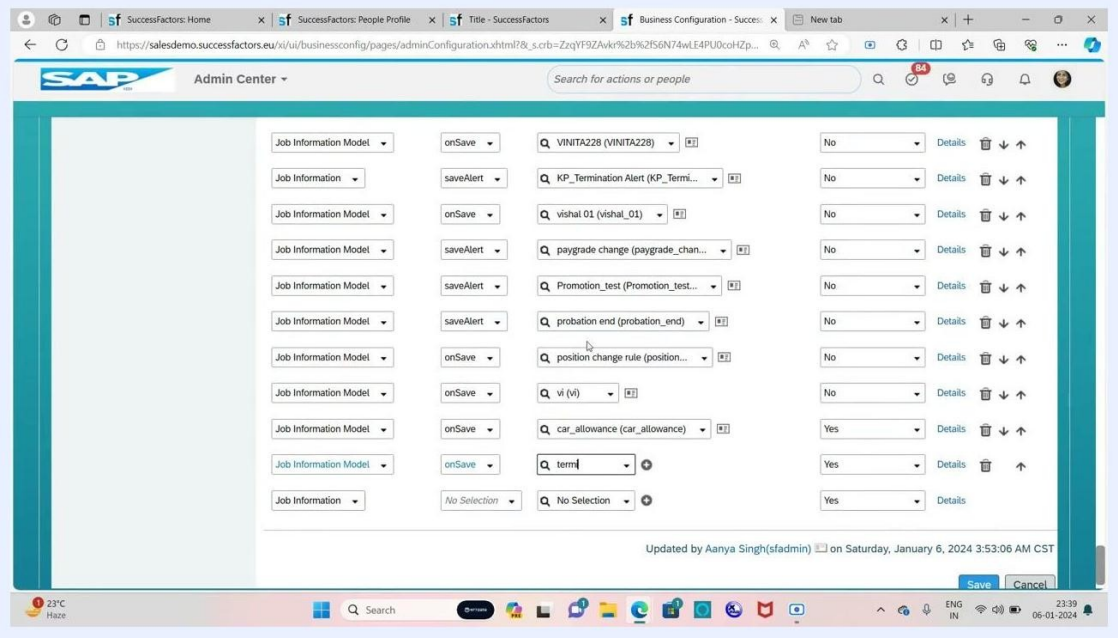


Job Information Model rule assignment with termination br (termination_br) being selected in the onSave dropdown

Step 11: Save and confirm the configuration

1. Click **Save** at the bottom of the configuration screen.
2. Review the confirmation dialog, which lists the changes and any deprecated fields.

3. Click **Confirm** to finalize the assignment.

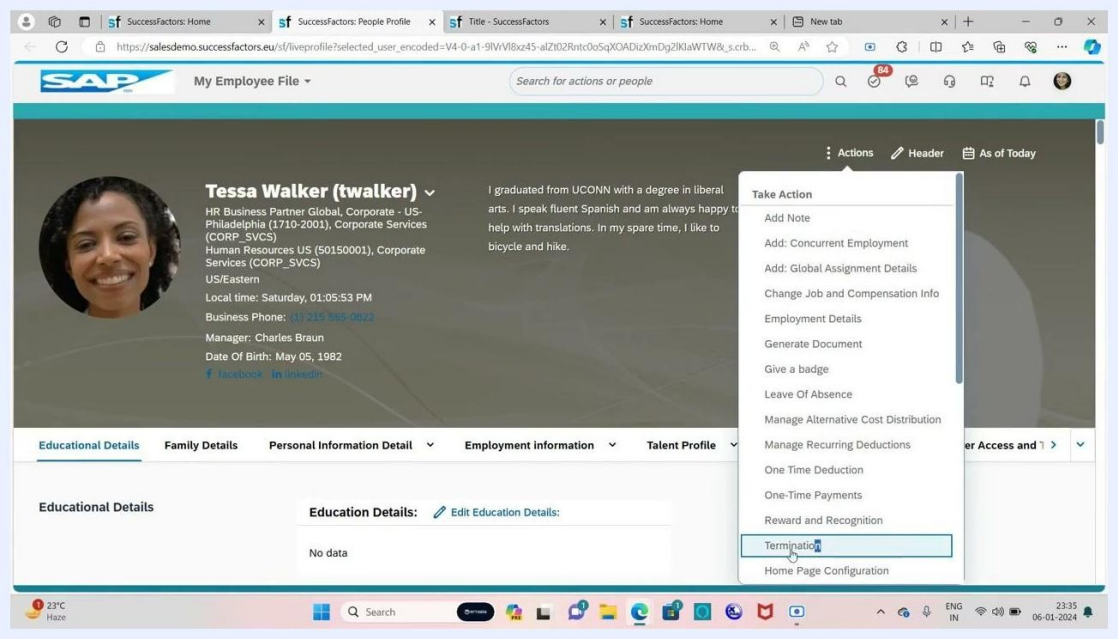


Confirmation dialog for saving changes in Business Configuration with the Confirm button highlighted

Terminate the employee and submit for approval

Step 12: Open the employee profile

Open SAP SuccessFactors and go to the profile of the employee you want to terminate. Check details such as name, manager, and business phone to confirm you have the correct employee.

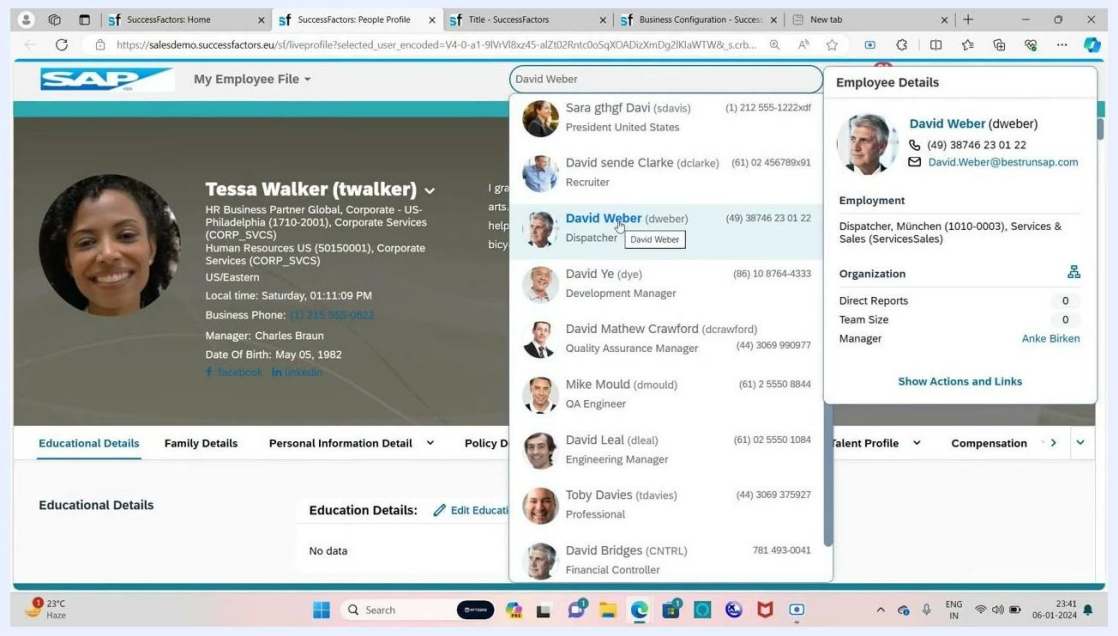


Employee profile screen showing employee details, manager, and available actions

Step 13: Start the termination

1. Click the **Actions** menu at the top right.
2. Select **Take Action**.

3. Scroll the dropdown and click **Termination**.



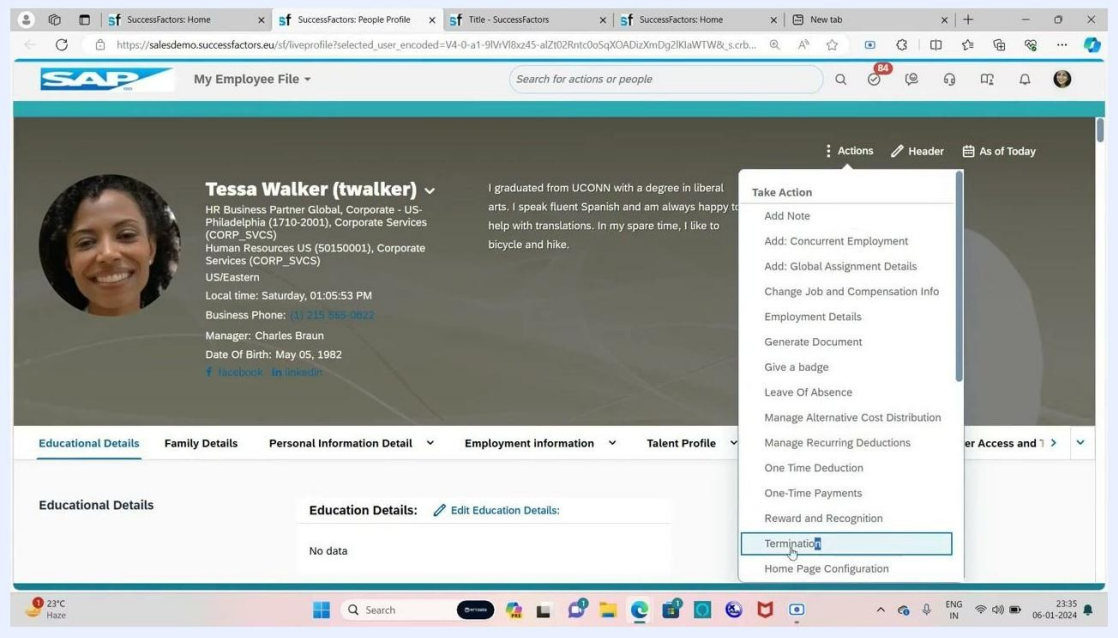
Actions dropdown open on David Weber's profile with the Termination option visible among other actions

Step 14: Complete the termination form

In the **Termination** dialog, enter the following:

- **Termination Date:** Select the appropriate date.
- **Termination Reason:** Choose **Resignation - No Growth (TERTVTERM)**.
- **OK to Rehire:** Select **No**.
- **Regret Termination:** Select **No**.
- **Eligible for Salary Continuation:** Select **No**.
- Other fields, such as Payroll End Date, Last Date Worked, and Benefits End Date, as required.

Click **Save** to proceed.



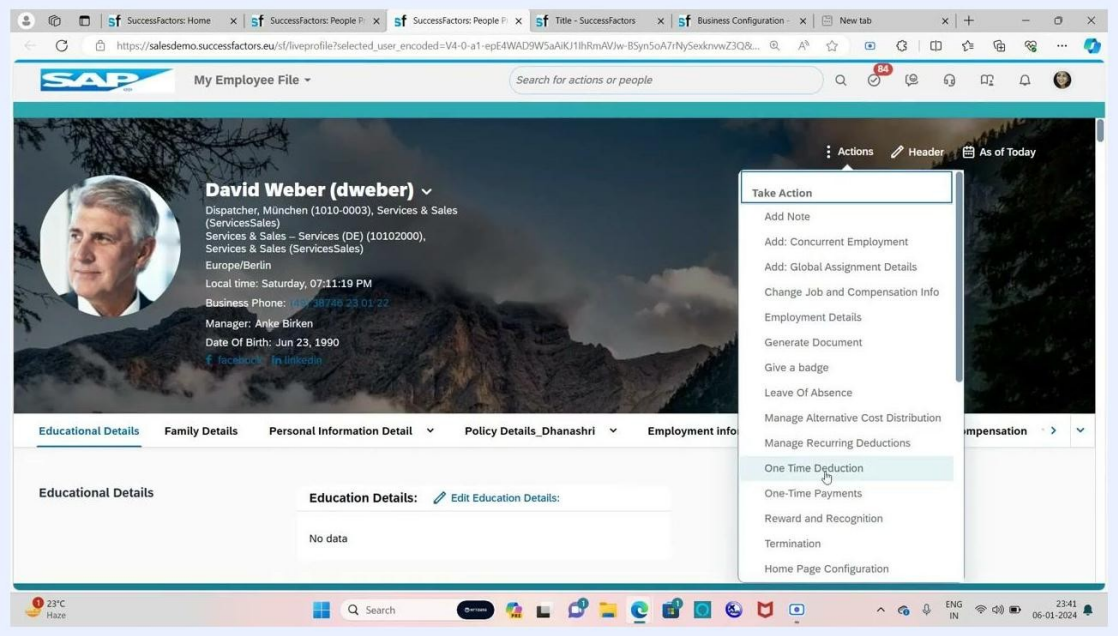
Termination form with Resignation - No Growth selected as the reason and other fields visible

Step 15: Confirm the termination request

A confirmation dialog appears with the text "Submitting Resignation - No Growth request for David Weber."

1. Optionally, enter a comment.

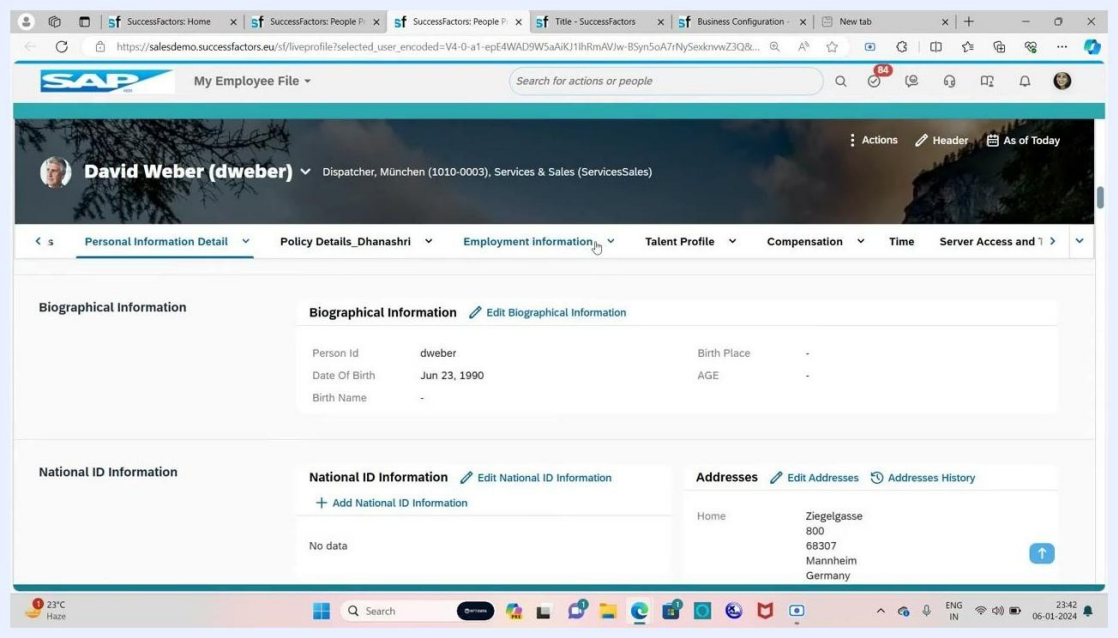
2. Click **Show Workflow Participants** to see who will approve the request.



Confirmation dialog for the resignation submission with the Show Workflow Participants link and a comment box

Step 16: Review the participants and submit

The approver is displayed (in this example, "Anke Birken, Service Manager"). Click **Submit** to send the workflow for approval.



Workflow approval dialog showing the approver Anke Birken with the Submit button highlighted

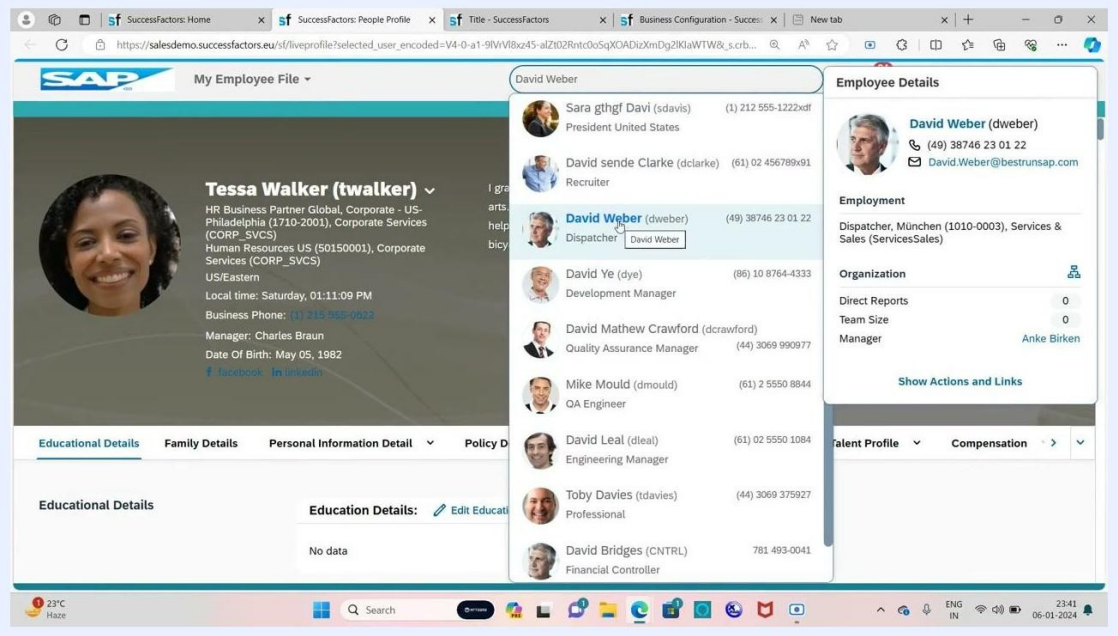
After you submit, a workflow approval request goes automatically to the employee's manager. The termination completes only after the manager approves it. If the manager doesn't approve, the workflow stops and the termination doesn't proceed.

Step 17: Handle any system message

If a message about employment details appears, read it carefully. For example:

"Since the transfer will be processed offline, you need to set the default termination event reason at Admin Center / Default event reason to use when processing direct reports and job relationships offline. The number of direct reports and job relationships that are to be adapted exceeds the threshold you've configured. As a result, the system adapts the reporting line and job relationships as a background job. You will receive an email when the background job is completed."

Click **Close** to dismiss the message.

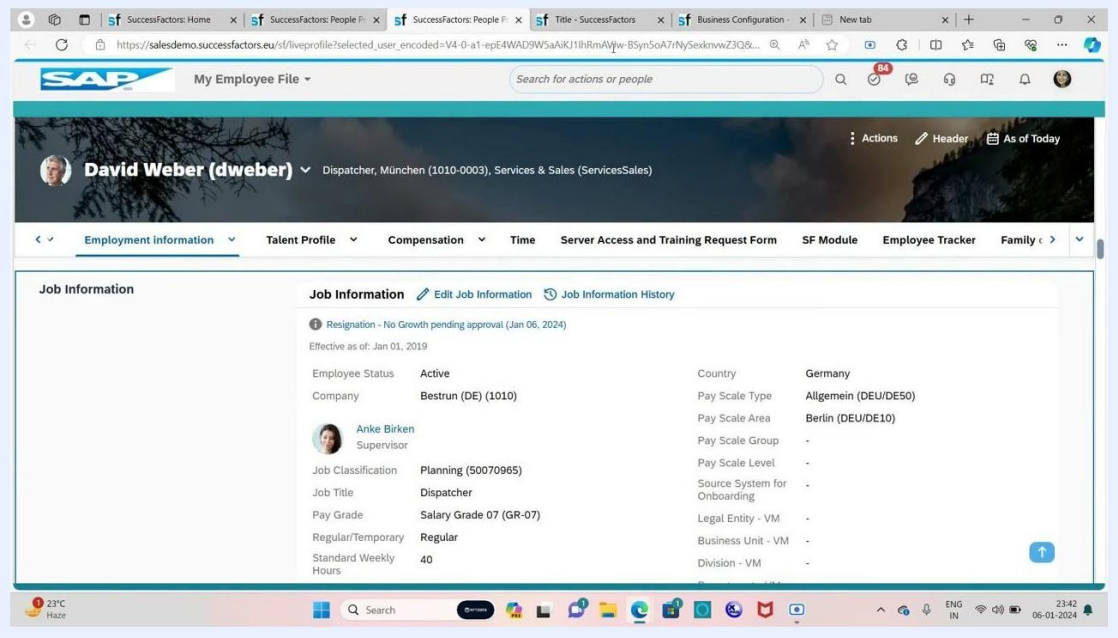


System message popup with employment details and warnings about offline processing and background jobs

Step 18: Check the pending resignation on the employee profile

1. Open the **Employment Information** tab of the employee's profile.
2. Under **Job Information**, confirm the status "Resignation - No Growth pending approval (Jan 06, 2024)."
3. Verify the supervisor (Anke Birken) and the other job details: Employee Status (Active), Company (Bestrun (DE)), Job Title (Dispatcher), Pay Grade (Salary Grade 07), and Standard Weekly Hours (40).

4. Confirm the country (Germany) and the pay scale details.



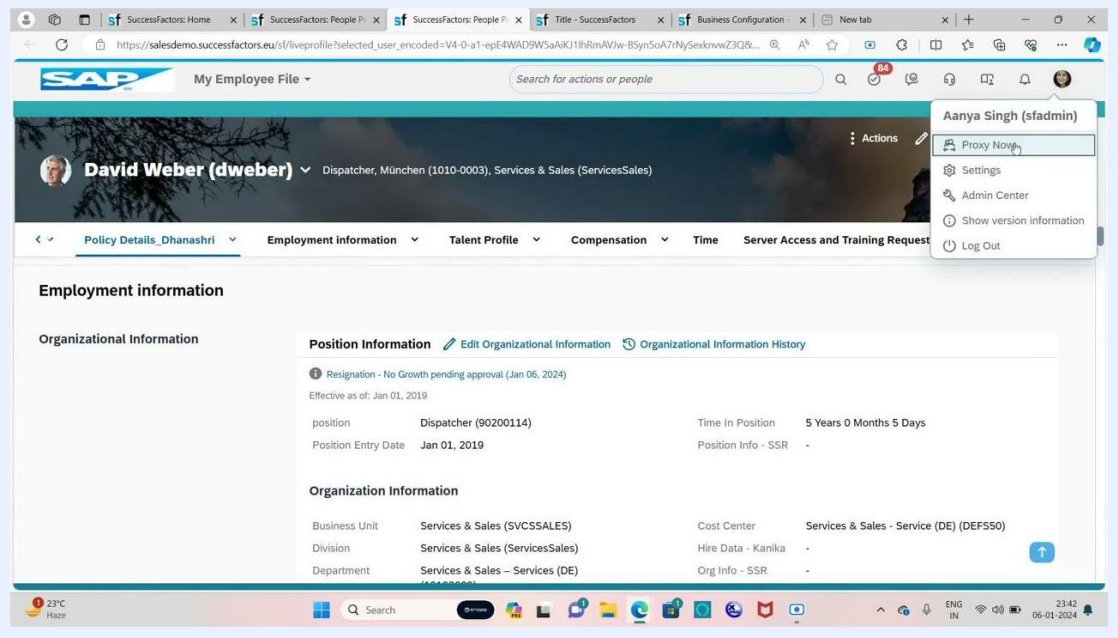
Employee profile for David Weber showing the Resignation - No Growth pending approval status with supervisor and job details

Approve the termination as the manager

Step 19: Proxy as the manager

1. Click the user profile icon in the top right corner.

2. Select **Proxy Now** to act as the manager (for example, Kanika).

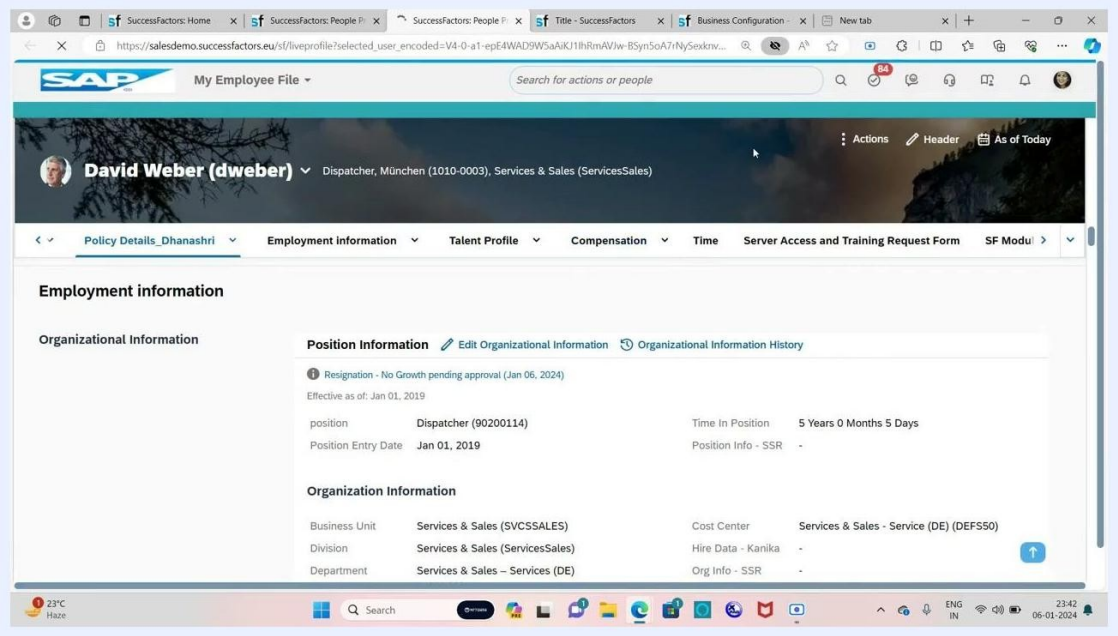


User profile dropdown open with the Proxy Now option highlighted

Step 20: Open the workflow request

1. Go to the **My Workflow Requests** page.
2. Locate the request titled "Resignation - No Growth for David Weber."
3. Review the details: Planning (50070965), München, Bestrun (DE) (1010), Services & Sales - Service (DE)(DEFS50), and other organizational information.

4. Confirm that Aanya Singh initiated the request on January 6, 2024, and that it is effective January 6, 2024.

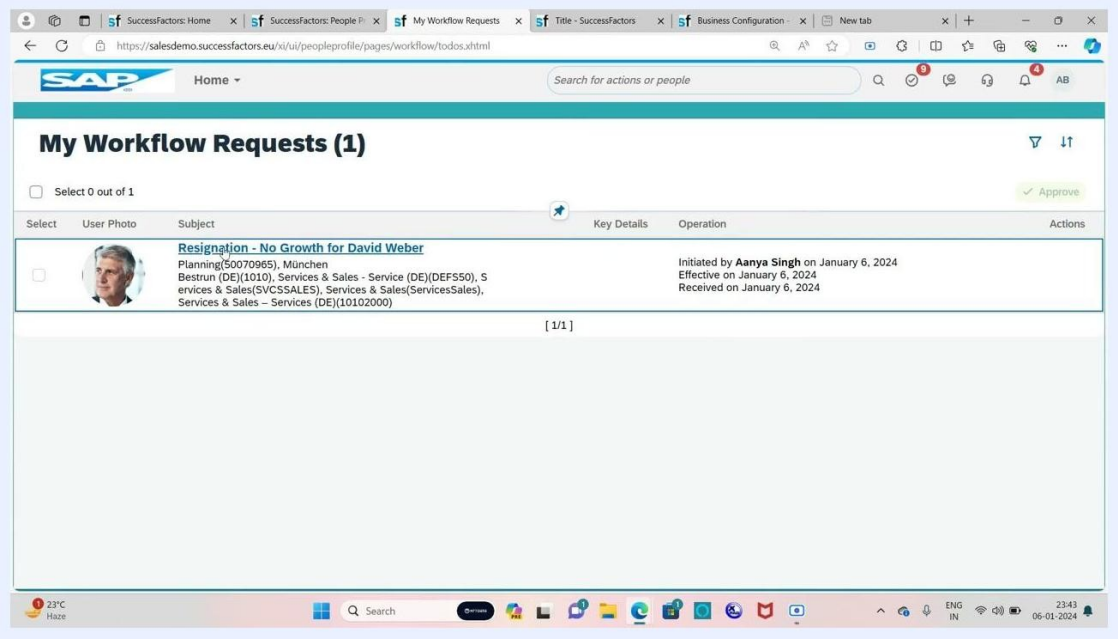


My Workflow Requests page with the resignation request for David Weber listed, showing details and initiator

Step 21: Review the request details

1. Click the subject "Resignation - No Growth for David Weber" to open the workflow details.
2. Review the summary, including the effective date, initiator, and workflow participants.

3. Confirm the termination details: Termination Date (Jan 06, 2024), OK to Rehire (No), Payroll End Date (Jan 06, 2024), Last Date Worked (Jan 06, 2024), Regret Termination (No), and other relevant fields.

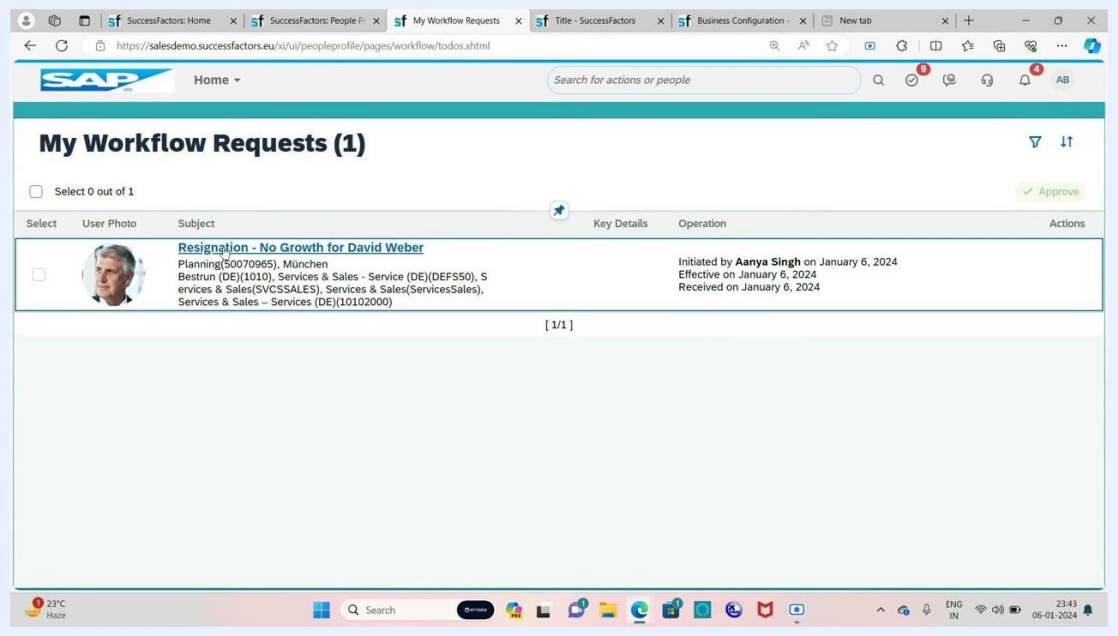


Workflow Details page for the resignation request with all termination details visible

Step 22: Approve or send back the request

1. Scroll to the bottom of the workflow details page.
2. Review **Time Off Balances as of Termination Date** (Comp Time: 00:00 hours available; Annual Leave (DEU): 30 days available).
3. Optionally, enter a comment in the **Comment** box.

4. Click **Approve** to finalize the resignation, or click **Send Back** if changes are needed.



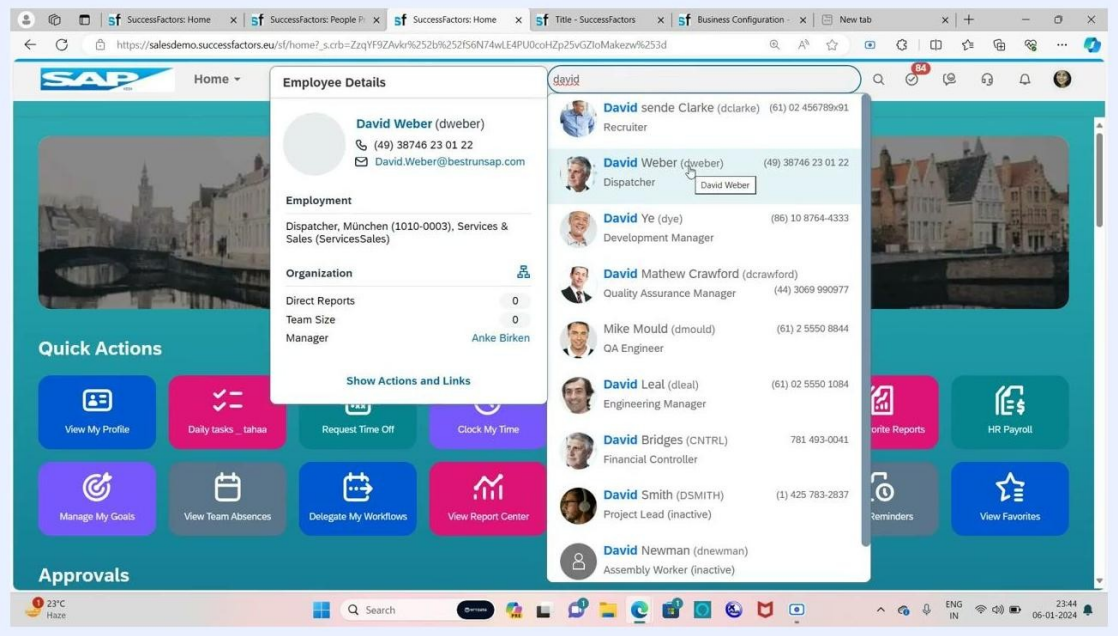
Workflow approval screen with the Approve and Send Back buttons, comment box, and time off balances

Verify the termination

Step 23: Confirm no workflow requests remain

1. Go to **My Workflow Requests** and make sure the list displays "No data," which means all requests have been processed.
2. Open the user profile menu at the top right. It shows you are still acting on behalf of the manager (Anke Birken).

3. Optionally, click **Become Self** to exit proxy mode.

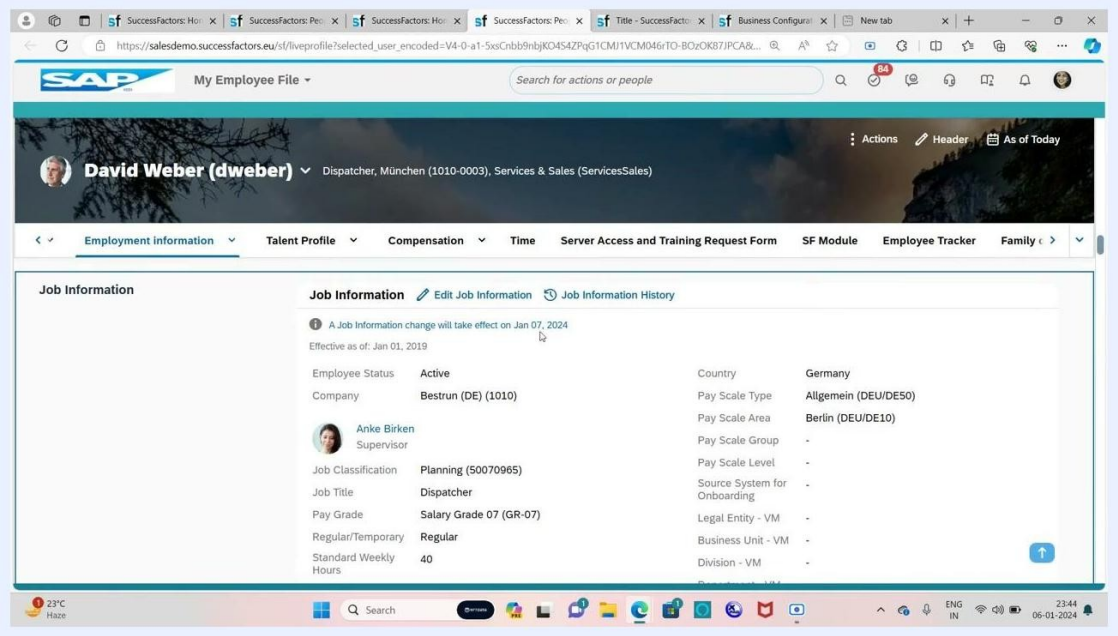


My Workflow Requests page showing no requests, with the user profile dropdown open and Become Self highlighted

Step 24: Find the employee

1. Enter "David Weber" in the search bar at the top.
2. Select **David Weber (dweber)** from the results.

3. Review the **Employee Details** pop-up and confirm the job title (Dispatcher), location (München), and manager (Anke Birken).

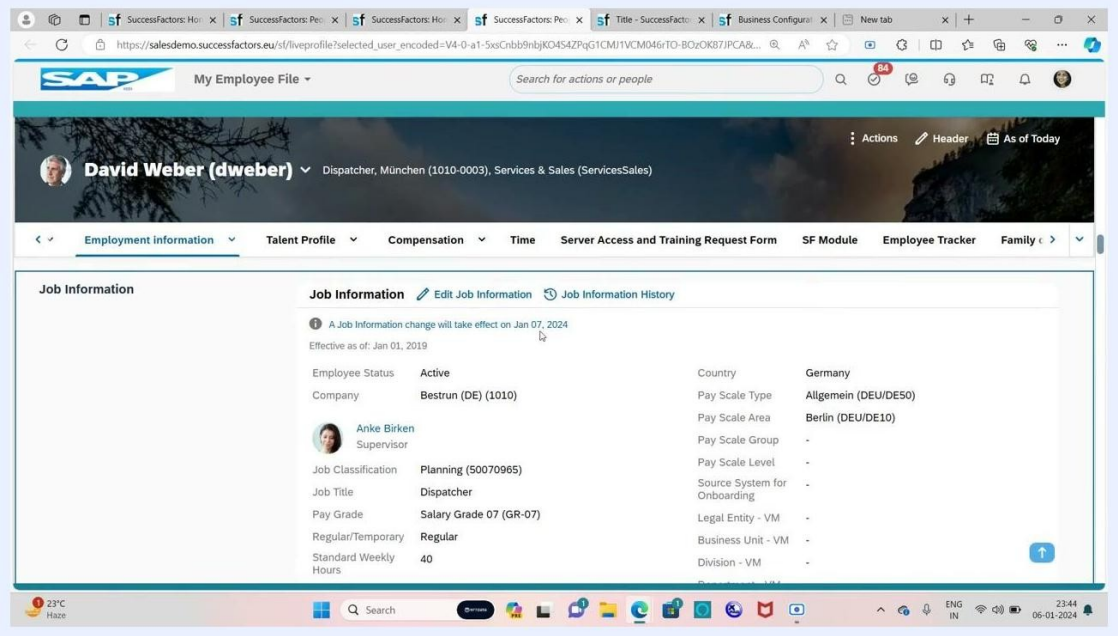


Employee search results with David Weber selected and the employee details pop-up visible

Step 25: Open Job Information

1. Click David Weber's name to open the full profile.
2. Go to the **Employment Information** tab.

3. Select **Job Information** from the dropdown.

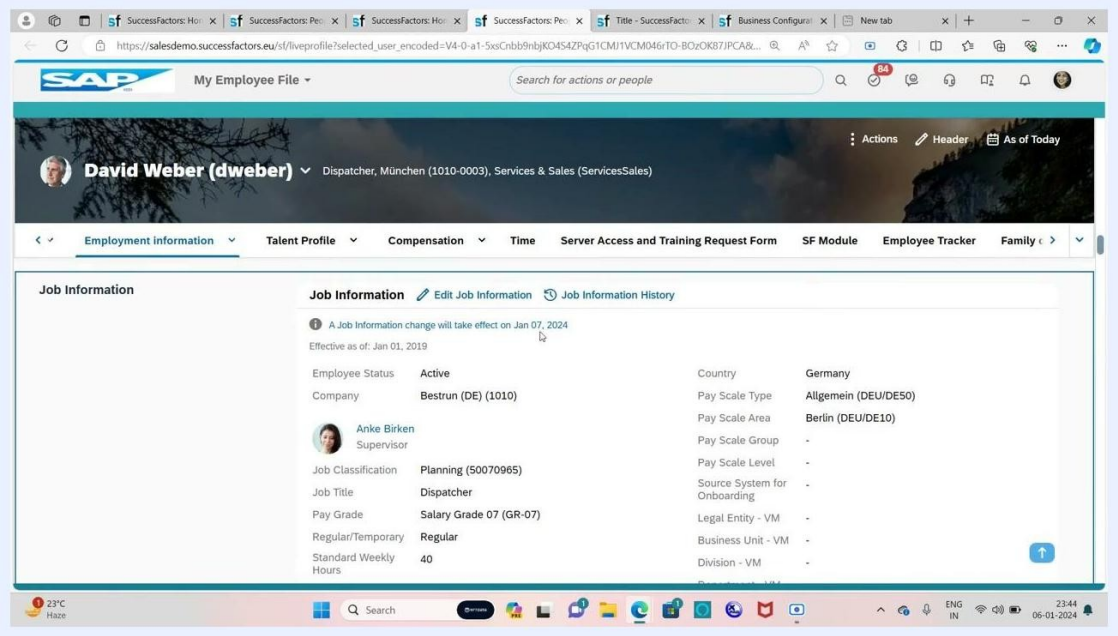


David Weber's employee profile with the Employment Information tab open and Job Information being selected

Step 26: Check the effective date

1. Confirm the message "A Job Information change will take effect on Jan 07, 2024."

2. Verify that **Employee Status** is "Active" and that the company, supervisor, job title, pay grade, and other details are correct.

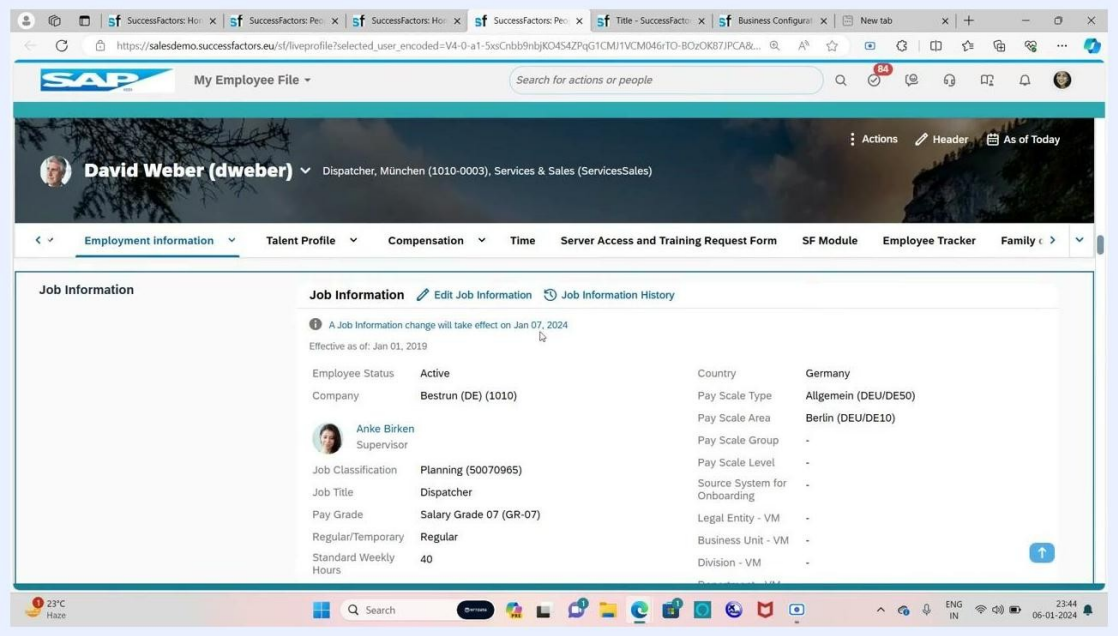


Job Information section showing the pending change effective Jan 07, 2024, with employee status Active

Step 27: Review the change history

1. Click **Job Information History** (or a similar option) to open the change history panel.
2. Confirm these entries: **Jan 07, 2024** "Resignation - No Growth" and **Jan 01, 2019** "New Hire."

3. Review the "New Hire" event details, including position, entry date, and time in position.



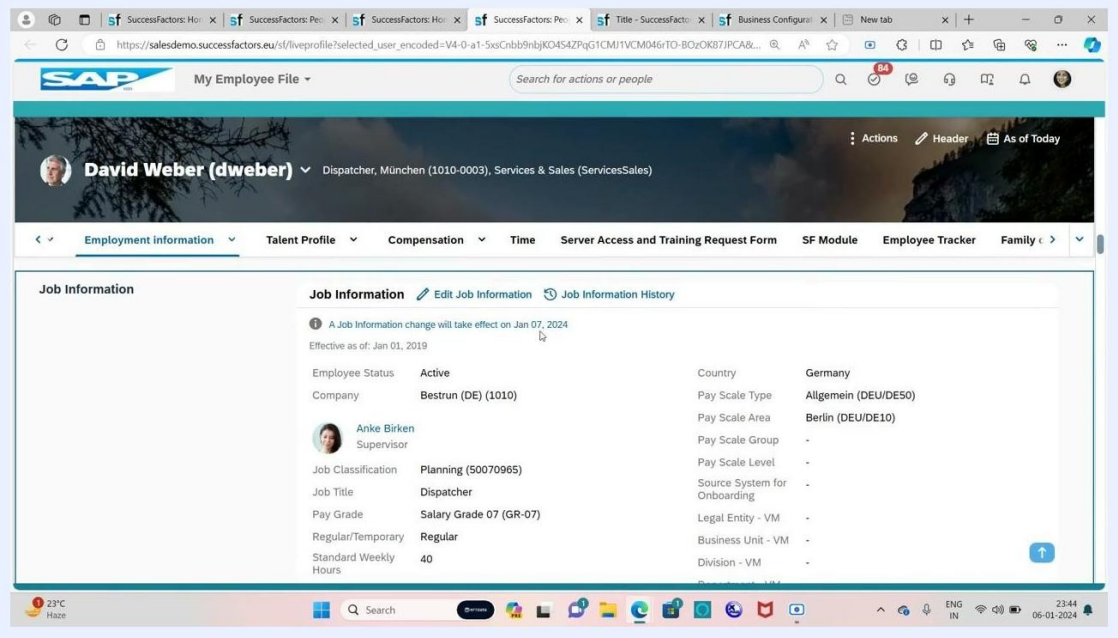
Change History panel showing Resignation - No Growth for Jan 07, 2024, and New Hire for Jan 01, 2019

Step 28: Verify the termination record

Select the "Resignation - No Growth" entry dated Jan 07, 2024, and confirm the following:

- **Employee Status:** Terminated
- **Event:** Termination
- **Event Reason:** Resignation - No Growth (TERTVTERM)
- **Position:** Dispatcher (90200114)
- **Position Entry Date:** Jan 01, 2019
- **Time in Position:** 5 Years 0 Months 6 Days
- **Company:** Bestrun (DE) (1010)
- **Business Unit, Division, Department, Location, Timezone, Cost Center:** as previously listed

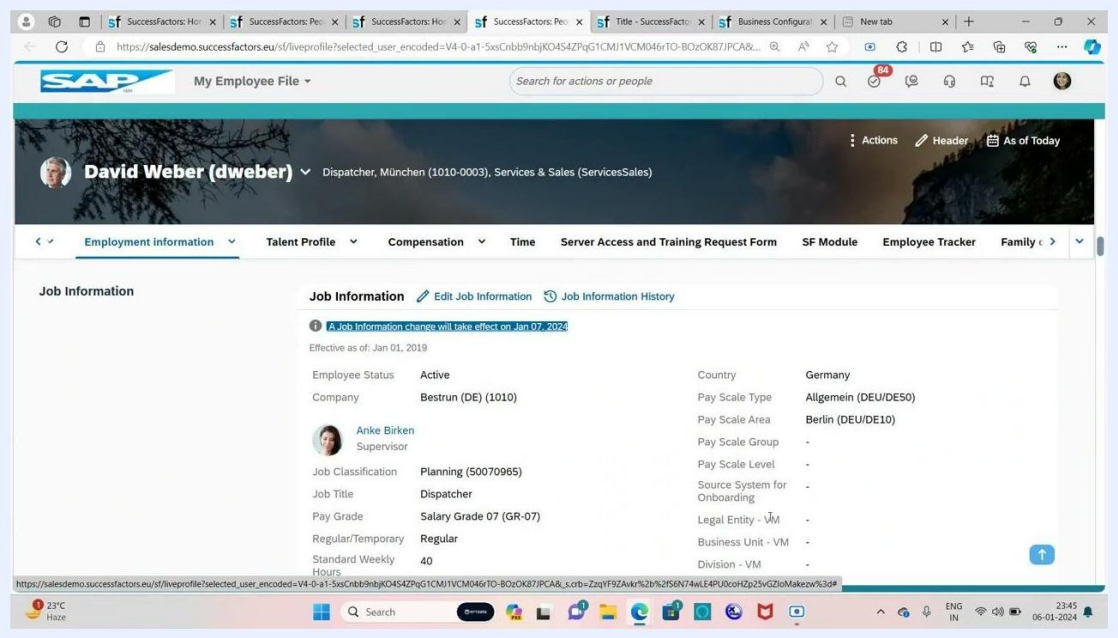
Optionally, click **View Approval History** for a workflow audit.



Change History panel showing the Terminated status and resignation details for David Weber

Step 29: Confirm the future-dated termination

The termination takes effect on Jan 07, 2024, as the job information and change history show. Until that date, the employee status remains "Active." After the effective date, it updates to "Terminated."



Job Information section showing the pending change effective Jan 07, 2024, with employee status Active

Summary

You now know how to terminate an employee in SuccessFactors with manager approval. You reviewed the **termination wf** workflow (Approver Role: Manager, No Approver Behavior: Stop the Workflow, Relationship to Approver: Employee). You created the **termination br** business rule on the Job Information Model and assigned it to the **onSave** column in **Manage Business Configuration**.

When you terminated the employee with the reason **Resignation - No Growth (TERTVTERM)**, the workflow sent the request to the manager. After the manager approved it, you verified the termination record. The system updates the employee's status to "Terminated" on the effective date set in the workflow.