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Lesson Objectives

- After completing this lesson, participants will be able to -
- Understand an overall about SF Employee Central System
 - Understand the Basics of Employee Central System
 - Log on to Successfactor Platform and do the Basic Navigations

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Traditional HR Solution

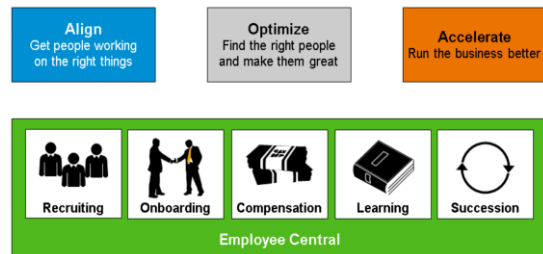


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EC Functions and Features

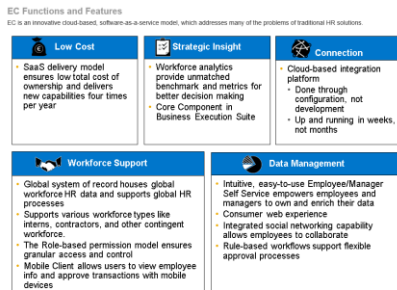


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EC Functions and Features



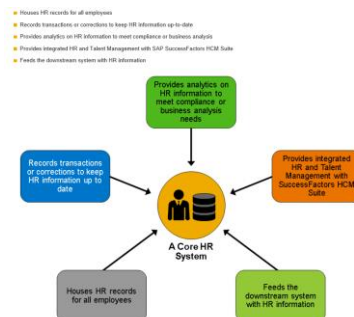
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EC Functions

EC integrates following functions including the following:



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Integration Capabilities



EC has two types of integration: Internal and External. Internal integration is how EC integrates with other SAP SuccessFactors products through HRIS synchronization. External integration can be challenging. It can involve several consultants, complex and custom development, time, and patience. EC connects HR data to other systems. This type of integration is a cost-effective solution that is completed through configuration, not development, allowing implementation to occur in weeks rather than months.

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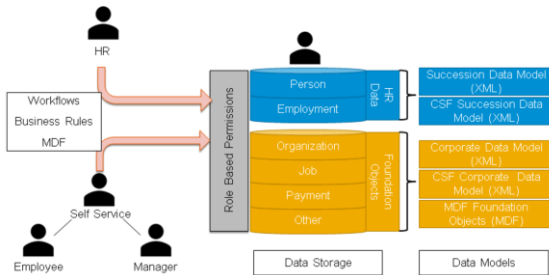
Integrates

| Internal Integration | External Integration |
|---|---|
| <ul style="list-style-type: none"> How EC integrates with other SuccessFactors HCM Products Completed through HRIS Sync | <ul style="list-style-type: none"> EC connects HR data to other systems, including the following: Payroll, Financials, Travel, Benefits, and so on through a cloud-based platform. Examples include the following: Application Programming Interface (API), Boomi, and SAP HANA Cloud Integration |

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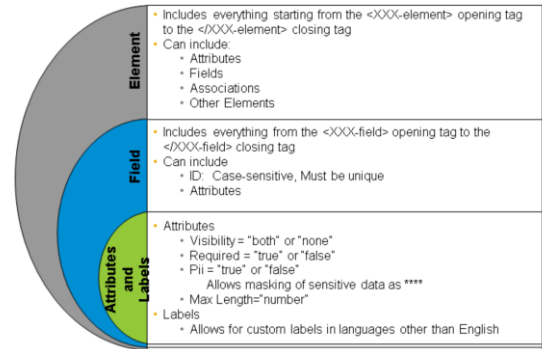
EC Components



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XML Vocabulary

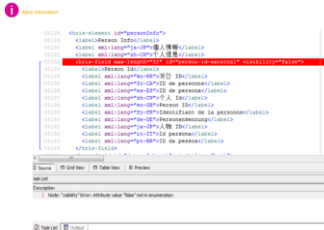


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XML Vocabulary: DTD

XML uses a Document Type Definition (DTD) to define structure. Much in the way that an English grammar dictionary tells Microsoft Word that certain sentences are incorrect, the DTD defines what is permissible in an XML document or file. In the figure, XML Vocabulary DTD, in the DTD, you can see that the visibility is set to 'None'. When the Data Model is validated, the DTD tells you that the visibility value is incorrect. Visibility requires null, none, or both.



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Data Models and XML Files



What do the Data Models do in EC? Look at the figure, Data Models and XML Files, to see a portion of the Succession Data Model, and compare the two screen shots. On the left, you can see the HRIS Element *personInfo*, and on the right, you can see a screen shot of Marcus Hoff's Biographical Information page.

Ask yourself the following questions:

- What fields are part of the element?
- How long can a Person ID be?
- How many languages are currently supported?
- Why does Date of Birth have a red star?
- Why is Date of Death not visible on Marcus Hoff's profile?

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Data Model and XML File

```
<hris:element id="personInfo">
  <hris:field max-length="15" id="person-id-external" visibility="both">
    <label>Person ID</label>
    <label xml:lang="ko-KR">외부 ID</label>
    <label xml:lang="fr-CA">ID de personnel</label>
    <label xml:lang="es-ES">ID de personal</label>
  </hris:field>
  <hris:field id="date-of-birth" visibility="both" require="true">
    <label>Date Of Birth</label>
    <label xml:lang="ko-KR">생년월일</label>
    <label xml:lang="fr-CA">Date de naissance</label>
    <label xml:lang="es-ES">Fecha de nacimiento</label>
  </hris:field>
  <hris:field max-length="100" id="birth-name" visibility="both">
    <label>Birth Name</label>
  </hris:field>
  <hris:field max-length="100" id="country-of-birth" visibility="both">
    <label>Country Of Birth</label>
    <label xml:lang="ko-KR">출생국가</label>
    <label xml:lang="fr-CA">Pays de naissance</label>
    <label xml:lang="es-ES">País de nacimiento</label>
  </hris:field>
  <hris:field max-length="100" id="place-of-birth" visibility="both">
    <label>City Of Birth</label>
  </hris:field>
  <hris:field id="date-of-death" visibility="none">
    <label>Date of Death</label>
    <label xml:lang="ko-KR">사망일</label>
    <label xml:lang="fr-CA">Date du décès</label>
  </hris:field>
</hris:element>
```

Biographical Information

Person ID
mho01

Date Of Birth
Jun 11, 1945

Birth Name

Country Of Birth
United States

City Of Birth

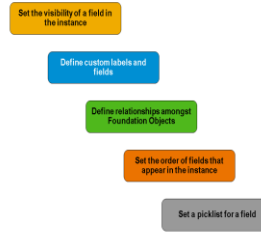
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Functions that Data Models Control

The Data Models in EC play a critical role in configuration. In the figure, Functions that Data Models Control, you can see a list of the functions that the Data Models control in an instance. You have already seen an example of visibility and custom labels in the figure, Data Model and XML File. Remember that you could see the Date Of Birth field and the Place Of Birth field when you selected City Of Birth.



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EC Data Models

| Succession Data Model | Country Specific Succession Data Model | Corporate Data Model | Country Specific Corporate Data Model |
|---|--|--|---|
| <ul style="list-style-type: none"> Configures fields that appear on the Employee's Personal and Employment Information (Employee's Record) | <ul style="list-style-type: none"> Sets international standards, like address format, and National ID format Configures country specific fields that appear on the Employee's Personal and Employment Information (Employee's Record) If a country is not defined, the system will use the configuration from the Succession Data Model | <ul style="list-style-type: none"> Defines some Foundation Objects Configures the relationships among Foundation Objects | <ul style="list-style-type: none"> Defines Foundation Objects fields for a specific country If a country is not defined in the system, then the system uses the configuration from the Corporate Data Model |

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Employee Records



Employee Records

The Succession Data Model controls the Employee Record. The Employee Record is divided into two main areas: Employment and Personal Information. Employment Information houses a record of the employee at work, including the following: job information, compensation information, and so on. Personal Information contains a record of the employee outside of work, including the following: home address, national ID, and contact information. Additionally, both the Employment and Personal Information Records can store country-specific information. For example, a company might record Equal Employment Opportunity (EEO) or Fair Labor Standards Act (FLSA) information in the USA or different kinds of national IDs.

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The Employee Record

Employment Information

Job Information

Employment Details

Job Relationships

Compensation Information

Country-specific Information

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Corporate Data Model



The Corporate Data Model controls some of the corporate data (for example, location or location group). The rest of the organizational structure (for example, legal entity, business unit, and division and department) was moved to MDF where it can be managed by the customer administrator directly through the Admin Center. The Corporate Data Model is divided into four main areas: Organization Structures, Pay Related, Job Related, and other. You can see a few examples of the different objects within these structures listed in the figure, Corporate Data.

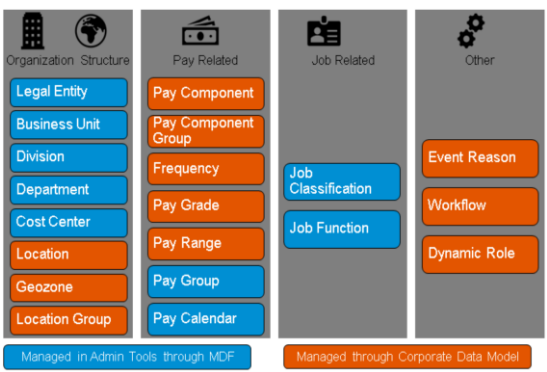
Additionally, the Corporate Data Model can contain country-specific information. For example, your Location object may contain different address formats depending on the country.

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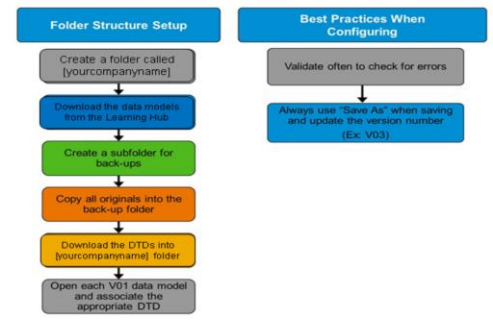
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Corporate Data



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XML Management



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Document Type Definition (DTD) Associations



In the figure, DTD Associations, you can see the associated DTDs for each of the corresponding XML data models.

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DTD Associations

| Data Model | DTD |
|---------------------------|-----------------------------|
| Succession Data Model | sf-form.dtd |
| CSF Succession Data Model | country-specific-fields.dtd |
| Corporate Data Model | Corporate-datamodel.dtd |
| CSF Corporate Data Model | country-specific-fields.dtd |

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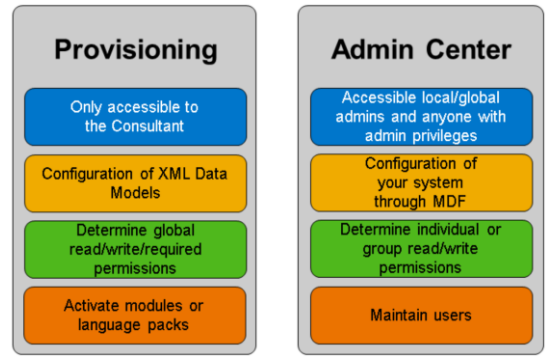
Provisioning and Admin Center



Both Provisioning and Admin Center are necessary to configure and maintain EC. The figure, Provisioning and Admin Center, lists some of the key roles of each tool. When working with EC, we recommend that you choose a different browser when using each tool. For example, you might use Google Chrome for Provisioning and Mozilla Firefox for the EC instance. Choosing different browsers enables you to work in both areas without logging out and on again.

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Provisioning and Admin Center



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Instance Preparation to Receive Notifications



To prepare your test instance, you need to update all employees email addresses so that you receive system notifications. In the figure, Test Instance Preparation, you can see the updated Email Information import file and the attached screenshot showing how to load the information.

Test Instance Preparation



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Admin Center

Applicant Status Configuration • Edit Base

Edit this base set to make statuses available for your applicant status sets.

Add New

| Status ID | Status Name | Category | Last Modified | Actions |
|----------------------------------|----------------------------|------------------|---------------|-----------------------------|
| 53 | Futureware | Futureware | 03/18/2013 | |
| 54 | Invited To Apply | Invited To Apply | 03/18/2013 | |
| System Statuses | | | | |
| 61 | Default | Applied | 03/18/2013 | |
| 62 | Auto Disqualified | Closed | 03/18/2013 | |
| Withdrawn Statuses | | | | |
| 65 | Withdrawn By Candidate | Withdraw | 03/18/2013 | |
| In Progress Statuses | | | | |
| 66 | Pre-Screening | Screening | 03/18/2013 | Take Action |
| 67 | Short List | Screening | 03/18/2013 | Take Action |
| 68 | Interview | Assessment | 03/18/2013 | Take Action |
| 81 | 2nd Interview | Assessment | 03/21/2013 | Take Action |
| 69 | Invited to Training | Other | 03/21/2013 | Take Action |
| 82 | Background Check | Assessment | 03/21/2013 | Take Action |
| 70 | Other | Other | 03/18/2013 | Take Action |
| 70 | Hired | Hired | 03/18/2013 | Take Action |
| 101 | Interview | Screening | 04/15/2013 | Take Action |
| Disqualification Statuses | | | | |
| 71 | Rejected - Not Qualified | Closed | 03/18/2013 | Take Action |
| 72 | Disqualified And Not Award | Placed | 03/18/2013 | Take Action |

Admin Center

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EC Environment

Quick Card

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Transaction Fundamentals

Changes made to an employee record

Examples

New Hire

Promote

Address Correction

Job Title Change

Effective Dating

Required on certain portlets

Can be set for Past Present Future

Approval

A transaction may trigger an approval process referred to as a workflow

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Administrative or HR Edits

Effective Dating

When would you like your changes to take effect?

☐ Used the employee record for current hire or last day? See Job Information or Compensation
☐ Inserting a new record changes existing record using the date of the previous day
☐ Multiple changes per day can be supported
☐ Records are not active until the effective start date

Address:

City:

State:

Zip:

Country:

Many of the records in EC are effective-dated. Each time you insert a new record for one of these items, the system prompts you to provide the effective start date. It is important to understand and to maintain accurately effective dates because they enable you to create historical, present, and future records. For example, if Marcus is moving in January, you can add to new address with an effective date in the future. However, Marcus will not see that change in effect until January. In the application, the start date and end date are always effective dating. The start date is usually dependent on the ID. The field end date does NOT typically appear in the UI.

When you create the first record for an entity, the start date is supplied by the user creating the record and the end date will be set to December 31, 9999.

When you add a new record for an effective dated portlet, the system does not change the stored data, instead, it creates a new row of data to track the new values from the effective start date of the change and continues to store the values that were effective before the change. The end date of the previous record is updated to 1 day before the new record's start date.

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Administrative or HR Edits (Contd.)

| Person ID External | Address | City | State | Zip Code | Start Date | End Date |
|--------------------|----------------|--------------|--------------|----------|------------|------------|
| 101001 | 214 E 9th Ave | Conshohocken | Pennsylvania | 19383 | 3/2/2011 | 12/31/9999 |
| 101001 | 214 E 9th Ave | Conshohocken | Pennsylvania | 19383 | 3/2/2011 | 12/31/2019 |
| 101001 | 315 W 10th Ave | Conshohocken | Pennsylvania | 19383 | 1/1/2020 | 12/31/9999 |

Person Info

Person ID: Person Name: Person Title: Person Email:

Person ID: Person Name: Person Title: Person Email:

Person ID: Person Name: Person Title: Person Email:

Person ID: Person Name: Person Title: Person Email:

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Forward Propagation

| Start Date | Field A | Field B |
|------------|---------|---------|
| Jan 1 | 10 | 10 |
| Dec 1 | 10 | 20 |

Insert Record July 1, 15, 15

| Start Date | Field A | Field B |
|------------|---------|---------|
| Jan 1 | 10 | 10 |
| July 1 | 15 | 15 |
| Dec 1 | 15 | 20 |

You may need to insert data that is between 2 records of an effective dated portlet. In this case, it is important to understand the concept of forward propagation.

Forward propagation means that a change in the value of a field in an entity is also made (propagated) to future records for the same entity. The forward propagation of this field change stops as soon as one of the future records has a field value maintained that is different from the original field value.

For example, imagine the initial record has a start date of Jan 1 and the values of Fields A and B are set to 10. A second record has already been entered into the system with a start date of Dec 1. The value of Field B was changed to 20. In this example the value of Field A has not changed.

You want to go back to insert a change that occurred on July 1, where the values of Field A and Field B were both 15. If forward propagation is enforced, the value of Field A will be updated on the Dec 1 record, while the value of Field B on the Dec 1 record will remain unchanged. This is because forward propagation continues until the field value of the record is different than the original. In this case Field B had a different value than the original record (Jan 1).

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Add New Employee

Add New Employee

Identity

Hire Date: Company:

Event Reason:

Name Information

First Name: Middle Name: Last Name:

Suffix:

Display Name: Birth Name:

Name in Alternate Language 1

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Rehire Check

Rehire Check

John Doe (123456789)

Terminated on 12/31/2019

Start Date: 01/01/2020

End Date: 12/31/2020

Reason: No Selection

Rehire Reason: No Selection

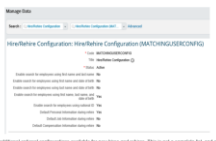
Rehire Reason: No Selection

Rehire Reason: No Selection

After entering the new hire details, the system will check for previous employment records. If a previous record is found, the system will prompt you to select the reason for the rehire. If you select the reason for the rehire, the system will prompt you to select the reason for the rehire. If you select the reason for the rehire, the system will prompt you to select the reason for the rehire.

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New Hire Additional Configuration



There are a variety of additional optional configurations available for new hires and rehires. This is not a complete list, and each would require some configuration. You can locate the feature and how to configure it via the SAP Help Portal.

Some of the optional configurations include:

- **Default:** Enable search for employee match options. Configure support for search fields of employees, such as Names, Date of Birth, or National ID to match an incoming employee.
- **Default:** Default information for Rehires. Include or exclude Personal, Job and Compensation information data from a previous employment.
- **Direct Rules to Generate employee ID:** Create user IDs using Business rules, for example, if you want specific ranges for specific regions or countries.
- **Warning Messages to New Employee Layer:** New hiring employees notified to the company to keep their existing approval process consistent and straight.
- **Publishing Change of Legal Entity in Any Employment:** Set the system up so that it doesn't indicate a change of legal entity within new employment. For an active employee, you must first terminate the employee in the system from the old legal entity and then enter them with new employment on the new legal entity.
- **Check New Hire Self-Terminal:** Enter the new information and how termination is a single but New Hire for Term Terms.
- **Accessing Future Transfers and Moves:** Configure managers and address to see upcoming transfer or hire prior to the transfer date to add employee data and complete the hire process.

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Termination



You terminate an employment in Employee Central when an employee leaves the company. You will need to include a termination date and termination reason. Additional fields are available on the termination screen that do not normally appear in the Employment Information profile. If the employee is a manager with direct reports, then the Terminate Direct Reports action will appear on the screen. You can select how the list about who the direct reports will then report to.

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Employee Central Foundation Objects



EC is currently undergoing a process to convert all content managed through XML, Files and Data Models to Metadata Framework (MEF). MEF allows administrators to manage the structure of an object directly in the EC instance, rather than through XML coding.

The first phase of this process started in 2015, with the conversion of some FO to MEF FO. As of the current release, the following Foundation Objects have been moved over to MEF:

- Legal Entity
- Business Unit
- Department
- Division
- Cost Center
- Job Classification
- Job Function
- Pay Group
- Pay Calendar

Over the next few years, all of the objects currently managed through data models will be converted to MEF, eliminating the need for XML. However, as this process is completed, there will be different ways of accessing objects managed through XML versus objects managed through MEF. The modules in this course explain both of the ways that you can access data during this process.

In EC, Foundation Objects (FO) and Records capture detailed information about a company's organization, pay, and job structures. The FOs remaining in the Corporate Data Model are managed (populated) in Admin Center, under Manage Organization, Pay, and Job Structures, and configured in the Corporate Data Model. The FOs converted to MEF are managed (populated) in Manage Data, and configured in Configure Object Definitions within the Admin Center.

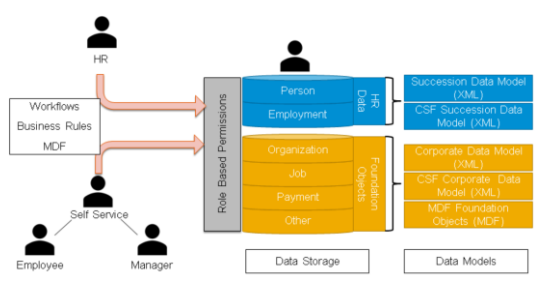
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EC Structures



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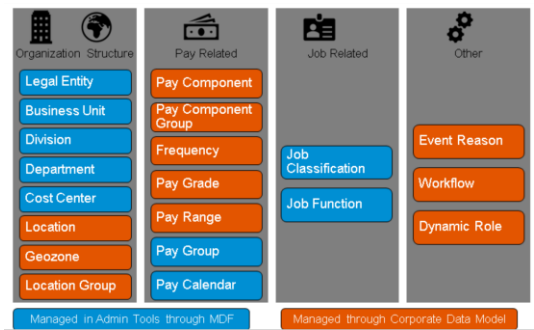
FO Definition



FO are effective dated and provide company structure. The objects themselves can be customized to hold company-specific data. The records built from these FO define the customer's organization, pay and job structures. These must be built before any employee data can be added into the system.

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FO Definition



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FO Example



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FO Example



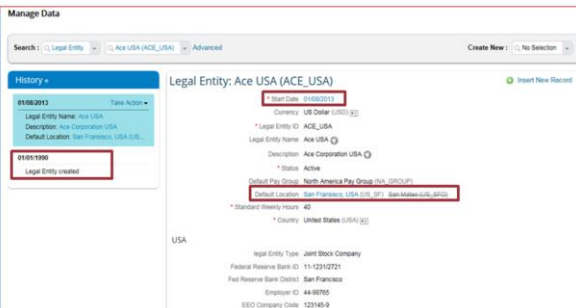
45

FO Effective Dating



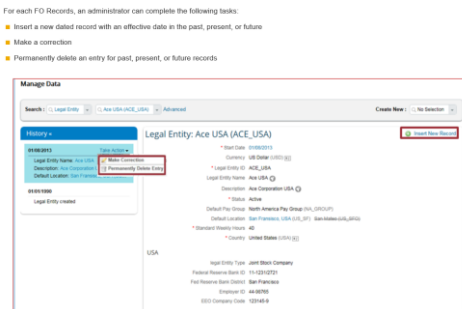
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Effective Dating of FO



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Effective Dating of FO:Administrator Tasks



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Foundation Objects

Employee Files

Legal Entity: Ace Germany (ACE_DEU)

- * Start Date: 01/01/1990
- * Currency: Euro (EUR)
- * Legal Entity ID: ACE_DEU
- Legal Entity Name: Ace Germany
- Description: Ace Germany Corporation
- * Status: Active
- Default Pay Group: EMEA Pay Group (EMEA_GROUP)
- Default Location: Munich (DEU_MUN)
- * Standard Weekly Hours: 40
- * Country: Germany (DEU)

Updated by admin

Organizational Information

* Company:

- Ace Germany (ACE_DEU)
- Ace Australia (ACE_AUS)
- Ace Brazil (ACE_BRA)
- Ace Canada Corp (ACE_CAN)
- Ace China (ACE_CHN)
- Ace Denmark (ACE_DNK)

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FO Propagation



FO are also used in propagation. For example, your company is hiring multiple employees with the same Job Classification. During the new hire process, the HR admin selects Job Classification: Engineer (ENG). Propagation then uses information from the FO records to automatically propagate subordinate fields like Job Title, Pay Grade, Regular/Temporary, and so on. You will learn how to configure propagation in a later module.

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FO Propagation

Job Classification: Engineer (ENG)

- * Start Date: 01/01/1990
- * Job Code: ENG
- Standard Hours: 40
- Job Title: Engineer
- Description:
- * Status: Active
- Workweek Code: 9504
- Parent Job Classification:
- Job Level: IC - NonManager
- Regular/Temporary: Regular
- Employee Class: Employee
- Is Full Time Employee: Yes
- Supervisor Level:
- Pay Grade: Salary Grade 6
- Job Function: Sales Engineering (SAE)

Employee File: Engineer (ENG)

Effective as of: 01/01/2020

Job Code: ENG

Job Title: Engineer

Description:

Status: Active

Workweek Code: 9504

Parent Job Classification:

Job Level: IC - NonManager

Regular/Temporary: Regular

Employee Class: Employee

Is Full Time Employee: Yes

Supervisor Level:

Pay Grade: Salary Grade 6

Job Function: Sales Engineering (SAE)

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FO Records Usage



With FO, you can assign the following items:

- Employee's business address
 - For example, every employee in the South San Francisco office has the same business address: 1 Tower Place, Suite 1100, South San Francisco, CA 94080. If an employee's location is the South San Francisco location, the employee's business address automatically becomes 1 Tower Place, Suite 1100, South San Francisco, CA 94080.
- Pay ranges by Legal Entity and Geo Zone (group of locations)
 - For example, a pay range is assigned to all employees with Job Classification: Engineer (ENG).
 - For example, the pay range is \$80,000-100,000 in North America, and the pay range is €90,000-110,000 in EMEA.
- Different payroll information
 - For example, the company must feed the data of US employees to ADP US and the data of Germany employees to SAP.

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Standard, Custom, and Country-Specific Fields (CSF)



Each Foundation Object has standard fields and custom fields. Additionally, most objects have country-specific fields, which allow you to collect locally-relevant data.

Standard Custom and Country-Specific Fields (CSF)

Job Classification: Engineering Director (DIR-ENG)

Effective as of: 01/01/2020

Job Code: DIR-ENG

Standard Hours: 40

Job Title: Engineering Director

Description:

Status: Active

Workweek Code: 9504

Parent Job Classification:

Job Level: Sr Manager Director

Regular/Temporary: Regular

Employee Class: Employee

Is Full Time Employee: Yes

Supervisor Level:

Pay Grade: Salary Grade 10 (DIR-10)

Job Function: Executive Leadership (ELC)

Custom String:

Standard Fields

Custom Field

Country-Specific Fields

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Associations with Foundation Objects (FO)



FO can only have relationships, which are known as associations, in the system. Relationships: Associations, you can see that the San Mateo office belongs to the ACE_USA Legal Entity. When you change an employee's company to ACE_USA, you can only see records in the Location list that are associated to the ACE_USA Legal Entity record. You will learn how to configure associations in a later lesson.

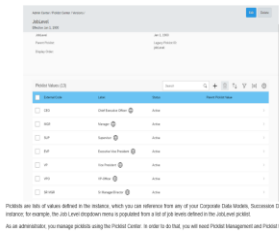
Relationships: Associations



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Picklist



Organization Data

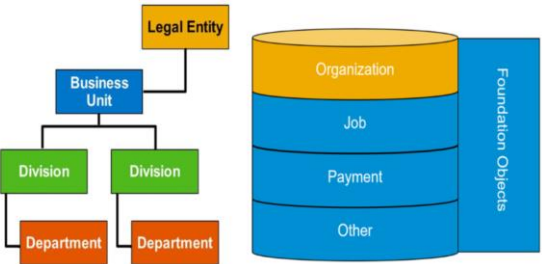


Organization Data is a category of FO. These records are the building blocks of the organization. Not only do you populate these records, but by using associations, you also define the organization's structure within the employee file. Additionally, just as with Locations, the system lists them out of the menu based on hierarchy.

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Organization Data



Legal Entity



The Legal Entity object stores the legal entities of a company. In the system instance for this module, you can see several records for the ACE_USA and ACE_USA_SFO. Legal Entity can only belong to one country, and that country determines the employee's country. You can also see the Standard Entity Name field. This field is used for Payroll Calculation (PTC) calculation. Even though the data entry screen is not up in the instance by default, you can also define them in Location or Job Classification. Country-specific fields appear based on the country that is selected for the Legal Entity.

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Legal Entity

Manage Data

Search: Legal Entity No Selection Advanced Create New: No Selection

History: 01/01/2013 Legal Entity created

Legal Entity: Ace USA (ACE_USA)

* Start Date: 01/01/2013
* Currency: US Dollar (USD) [X]
* Legal Entity ID: ACE_USA
Legal Entity Name: Ace USA [X]
Description: Ace Corporation USA [X]
Default Location: San Francisco, USA (US) [X]
* Status: Active
Default Pay Group: North America Pay Group (NA_GROUP)
Default Location: San Francisco, USA (US) [X] San Jose, CA, 95134
* Head of Division: [X]
* Country: United States (US) [X]
Country-Specific Fields
These are dependent on the Country dropdown value.

USA

Legal Entity Type: Joint Stock Company
Federal Reserve Bank ID: 11-1211271
Fed Reserve Bank District: San Francisco
Employer ID: 44-98765

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Business Unit

Manage Data

Search: Business Unit No Selection Advanced Create New: No Selection

History: 01/01/2013 Business Unit created

Business Unit: Corporate Industries (ACE_IND)

* Start Date: 01/01/2013
* Business Unit Code: ACE_IND
Business Unit Name: Corporate Industries [X]
Description: [X]
* Status: Active
Head of Unit: [X]
Updated by admin on Friday, June 22, 2012 11:03:29 AM PDT

A Business Unit is the level of the organizational hierarchy lower than the Legal Entity. It is the Business area of the company, representing one operating unit or representing the business function within the Company (not geographical).

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Division

Manage Data

Search: Division No Selection Advanced Create New: No Selection

History: 01/01/1990 Division created

Division: Accounting (ACCOUNTING)

* Start Date: 01/01/1990
* Code: ACCOUNTING
Name: Accounting [X]
Description: [X]
* Status: Active
Head of Division: [X]
Business Unit: Corporate Industries (ACE_IND) [X]

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Cost Center

Manage Data

Search: Cost Center No Selection Advanced Create New: No Selection

History: 01/01/1990 Cost Center created

Cost Center: Industries R&D (32000)

* Start Date: 01/01/1990
* Code: 32000
Name: Industries R&D [X]
Description: [X]
* Status: Active
Parent CostCenter: Industries (30000) [X]
Cost Center Manager: [X]
Cost Center External Object ID: [X]

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Location Group

Manage Organization, Pay and Job Structures

Search: Location Group No Selection Advanced Create New: No Selection

History: 01/01/1990 Location Group created

Location Group: NA_WEST (NA_WEST)

Effective as of: 01/01/1990
Blue indicates that the item changed on this date
Code: NA_WEST
Name: NA_WEST
Description: North America West
Status: Active
Updated by admin on Tuesday, March 22, 2011 3:16:05 PM PDT

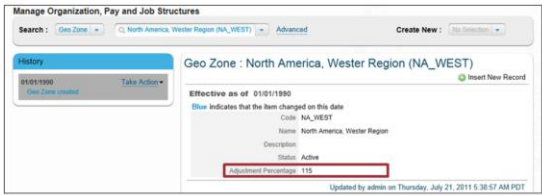
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Geo Zone



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Geo Zone



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FO Records Administration



FO Records Administration
Administrators can add, delete, and update records for any FO directly in the instance or by using the import tool.
Once you have navigated to Manage Organization, Pay, and Job Structures you can see the main administration page. There are three different parts, which are referenced in the figure, FO Record Administration (MDF).
1. The Search dropdown menu allows you to review any XML FO, for example, Location.
2. Once selected, you can use the additional dropdown menu to choose the specific record, such as New York. You can also use the Advanced link to change the date of the search and look for inactive records.
3. To create a new FO record, in the Create New dropdown menu, select the Foundation Object.

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FO Records Administration



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FO Record Administration (MDF)



FO Record Administration (MDF)
Once you navigate to Manage Categories you can see the main MDF administration page. There are three different parts, which are referenced in the figure, FO Record Administration (MDF).
To add, delete, and update FO Records managed through the Corporate Data Model, use Manage Organization, Pay, and Job Structures tool. You can also import records with Import Foundation Data tool.
To add, delete, and update FO Records managed through MDF, use Manage Data tool. You can also import records with either Import and Export data tool or Import Foundation Data tool.
The Search dropdown menu allows you to review any MDF Object (for example, Legal Entity).
Once selected, you can use the additional dropdown menu to choose the specific record, such as ACE_USA. You can also use the Advanced link to change the date of the search and look for inactive records.
To create a new FO record, in the Create New dropdown menu, select the Foundation Object.

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FO Record Administration (MDF)



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FO Record Import Process



FO Record Import Process
In the figure, FO Record Import Process, you can see the import process.
You can download templates directly from the UI. The CSV template matches the configuration of the FO in the system, therefore, two customer instances could have different templates (1). Ensure that you download the templates from the system.
In the Type section, reports must follow the order shown in the previous figure, FO Import Process. For example, you must start with Location, then Pay Group, and so on (2 and 3). There are two types of records: Full Purge and Incremental Load. Full Purge means that data in the import file replaces matching records in the system. Any previous history on the record is deleted with Full Purge. Incremental Load loads additional records to existing FO Record data into the system.
The Validate Import File button ensures that the import headers match and that the CSV file you are attempting to upload contains valid data (4). We recommend that you use the button before any import.
This report process also works for FO that are connected to MDF. Additionally, you can use the tool Import and Export Data to download MDF FO templates and import the records.

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CSF Corporate Data Model

Country

Address Type

Address 1

Address 2

Address3

City

State

Zip Code

Country

Address 1

City/District

Province

PostCode

CSF Corporate Data Model: Mapping of XML and Address Instance

[illegible]

In the figure, CSF Composite Data Model Mapping of XML and Address Instance, compare the XML to the instance for the Chinese address. On the left, you can see that the first field, Country, is set to visible and required; in the second set of fields, Address 1-3, you can see that only Address 1 is visible. Finally, look at Province, where you can see that a picklist is referenced in the XML, creating a dropdown menu in the instance.

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Country Specific Fields in MDF: Legal Entity

Legal Entity and/or legal entity Local is an example of a Foundation Object migrated to MDF. You can use the [Configure Object Definition](#) page to manage this MDF. There will be one Legal Entity for each country. For example, for USA, you would select the Legal Entity USA object used for Germany, you would select the Legal Entity Germany object. A sample object definition for Legal Entity USA is shown in the figure. Country Specific Fields in MDF: Legal Entity

The screenshot shows the AWS IAM console interface. At the top, the breadcrumb navigation reads 'Groups > LoganEntry_Aps_USA_IAM_ROLE_USA'. Below this, the 'Groups' page is displayed for the group 'LoganEntry_Aps_USA_IAM_ROLE_USA'. The 'Users' tab is selected, showing a list of users. The 'Effective permissions as of this time' section is expanded, showing the 'Custom Policies' tab. The 'EffectivePermissions_2018_03_01' policy is highlighted, which is a 'Custom Policy'.

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Complete Job Boards-specific Fields

Review and complete information in this section as requested. Information in the common fields are sent to all Job Boards that were selected in the previous step. They are same for all Job Boards selected in previous step. Job Boards might also have fields that are specific to each of them. Therefore, this information needs to be completed separately for each Job Board selected in the previous step.

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Demo

Successfactor Logon



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