



SuccessConnect

INTERNAL – SAP AND CUSTOMERS ONLY

HOL102 – Position Management

Position Management Processes and Validations in
SAP SuccessFactors Employee Central

Contents

LAB ACTIVITY #1 – ‘To Be Hired’ Status Adaptation	2
LAB ACTIVITY #2 – Select a Pending Hire as the Position incumbent.	6
LAB ACTIVITY #3 – Verify TBH Status Adaptation in Position	10
LAB ACTIVITY #4 – Update Positions to add Matrix Relationship and validate Capacity Control	15
LAB ACTIVITY #5 – Verify Position Mass Changes (Matrix Position).	20
LAB ACTIVITY #6 – Verify Position Mass Changes (Capacity Control)	25
LAB ACTIVITY #7 – Position Transfer and Follow Up Process	27

In this hands-on lab, learn how position management helps ensure proper head-count planning based on the ongoing changes in organizations. Through practice and demos, see how to configure and test system validations for position management using centralized services and follow-up processes and maintain position data.

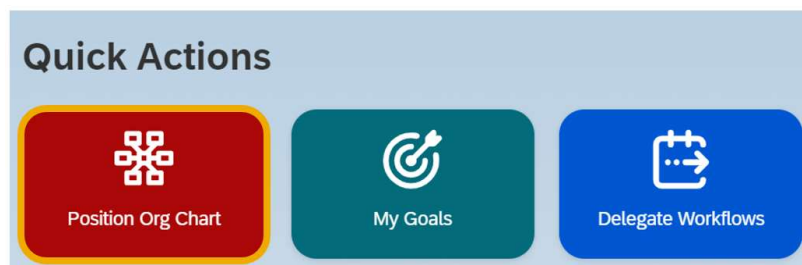
LAB ACTIVITY #1 – ‘To Be Hired’ Status Adaptation

In this activity, you will navigate to the Position Organization Chart to identify a vacant (TBH) position that we will be using for the Hands On Lab.

As a second step, you will review and make some changes in the *Position Management Settings* to ensure a correct TBH Status Adaptation when Position/Incumbent FTE changes as well as when an incumbent is assigned/unassigned from a position.

1. Navigate to the Position Organizational Chart. You can navigate from the Home menu > Company Info, and select the Position Org Chart sub-tab. But additionally, a custom navigation link and a custom Quick Action were configured in the instance, so you can **access using one of these two options**:

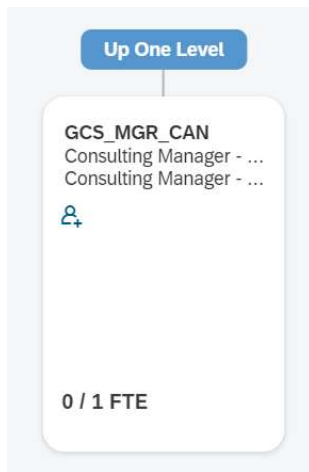
- In the Home Page, locate the Position Org Chart Quick Action and select it. (This action will open a new tab and you continue from there).



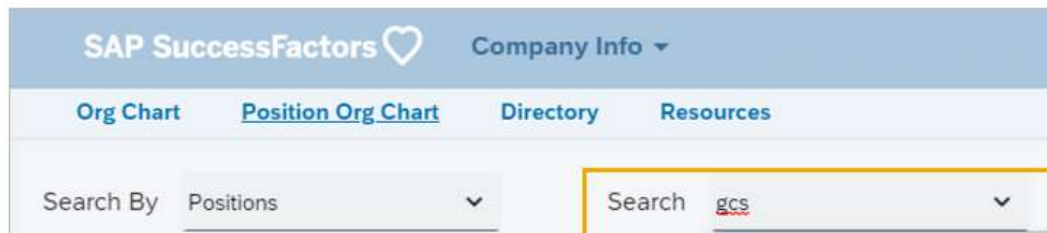
- In the action search, type **org** and select *Position Org Chart* from the displayed options.



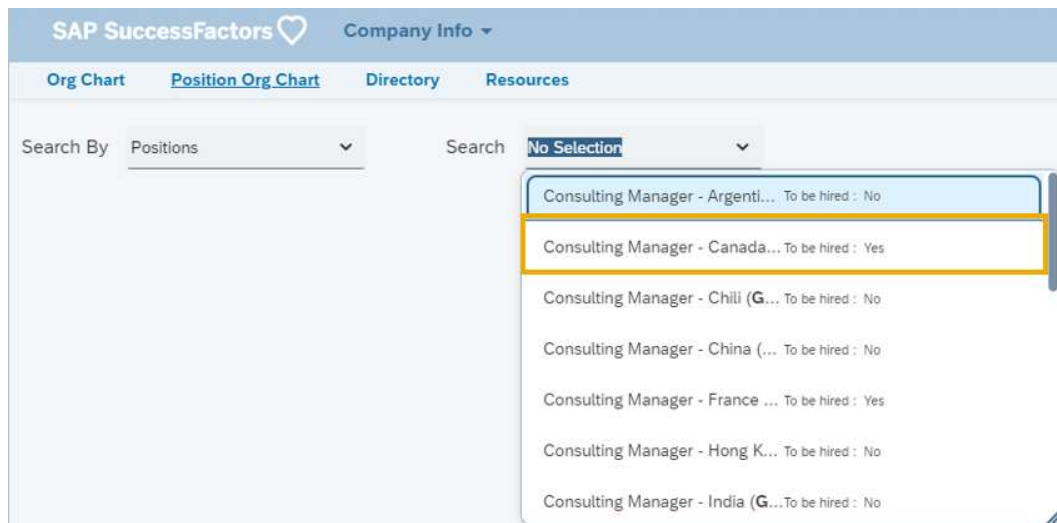
2. In the Position Org Chart, you may see the **Consulting Manager – Canada (GCS_MGR_CAN)** position. **If this is the case, proceed to step 5.**



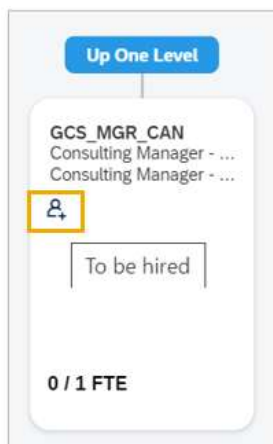
3. If you do not see the position yet, search for it now. Leave the first dropdown to *Search By: Positions*, and on the second drop down, type **gcs**.



4. A list of Consulting Manager positions will display. Select the **Consulting Manager – Canada (GCS_MGR_CAN)** position



5. Notice the position is **To be hired**, the current Full Time Equivalent (FTE) is 0 and the planned FTE for the Position is 1.



6. Navigate to *Position Management Settings* using action search



7. In the General tab, check the 'To Be Hired' Status Adaptation and review the Set or Reset TBH Status if Position or Incumbent FTE changes settings. You will notice that the current settings will adapt the *To Be Hired* status if:
- An incumbent is unassigned from a Position, whenever Current FTE < Planned FTE, which will mean that a position is understaffed and should be set to TBH.
 - An incumbent is assigned to a Position, when Current FTE = Planned FTE, which will mean that a position is filled and should no longer be TBH.

Back to: [Admin Center](#)

Position Management Settings

General Hierarchy Adaptation Synchronization UI Customizing Right to Return

You can use the options on this tab to regulate general behavior in Position Management.

Use Position Types ?

Is the Position External Code Auto Generated? ?

'To Be Hired' Status Adaptation

* Set 'To Be Hired' Status if Incumbent is Unassigned from a Position

* Reset 'To Be Hired' Status if Incumbent is Assigned to a Position

Set or Reset 'To Be Hired' Status if Position 'FTE' is Changed ?

Set or Reset 'To Be Hired' Status if an Incumbent's 'FTE' is Changed ?

8. There are two more options, currently set to **No**, which impact the TBH Status adaptation whenever the FTE value is changed from the Position or the Incumbent. To follow the best practice recommendation, you will now change the following options to **Yes**:

'To Be Hired' Status Adaptation

* Set 'To Be Hired' Status if Incumbent is Unassigned from a Position

* Reset 'To Be Hired' Status if Incumbent is Assigned to a Position

Set or Reset 'To Be Hired' Status if Position 'FTE' is Changed ?

Set or Reset 'To Be Hired' Status if an Incumbent's 'FTE' is Changed ?

9. Select **Save** to save the changes.



In this activity, you have successfully updated the TBH Adaptation settings to ensure a correct adaptation of the TBH field based on assignment and FTE changes in Position/Incumbent. You have also explored the Position Org Chart to identify a vacant position that will be used for the following activity.

LAB ACTIVITY #2 – Select a Pending Hire as the Position incumbent.

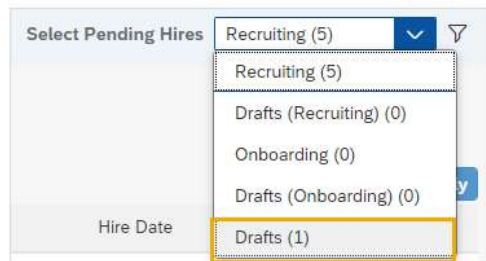
In this activity, you will be hiring an employee to the **Consulting Manager, Canada** position. You will be using one of the drafts in *Manage Pending Hires* to select the position and submit the workflow to be approved. In the next activity, you will have the opportunity to verify if the TBH adaptation comes into effect

1. Navigate to *Manage Pending Hires* using Action Search.



The screenshot shows a search bar with the text 'manage pending hires'. Below the search bar, a dropdown menu is open, displaying two options: 'Configure Columns for the Manage Pending Hires' and 'Manage Pending Hires'. The 'Manage Pending Hires' option is highlighted with a yellow border.

2. In the *Select Pending Hires* dropdown, choose **Drafts (1)**. The page might be loading for a little while until you can display the pending hire under this option.



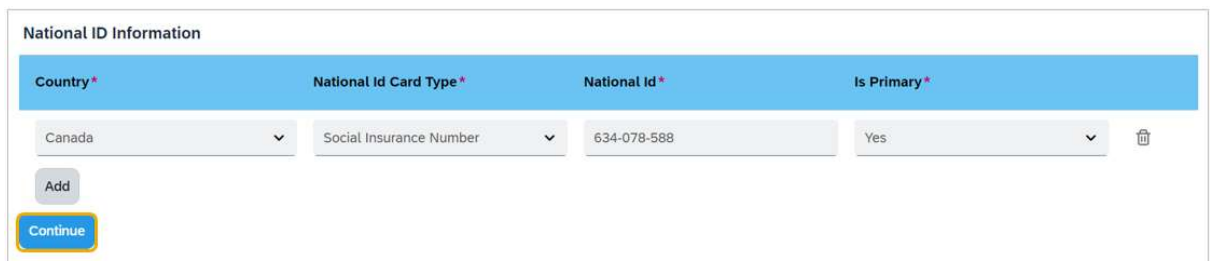
The screenshot shows a dropdown menu titled 'Select Pending Hires'. The menu is open, displaying a list of options: 'Recruiting (5)', 'Drafts (Recruiting) (0)', 'Onboarding (0)', 'Drafts (Onboarding) (0)', and 'Drafts (1)'. The 'Drafts (1)' option is highlighted with a yellow border.

3. In the results, you will see Michelle Gartner. Select on the name to open the Hire Wizard and complete the hiring.



Name	Hire Date	Job Title	Location
 Michelle Gartner	07/05/2023		

4. Scroll down to the end of the first page and select **Continue**.



The screenshot shows a form titled 'National ID Information'. The form has four columns: 'Country*', 'National Id Card Type*', 'National Id*', and 'Is Primary*'. The 'Country*' column has a dropdown menu with 'Canada' selected. The 'National Id Card Type*' column has a dropdown menu with 'Social Insurance Number' selected. The 'National Id*' column has a text input field with '634-078-588'. The 'Is Primary*' column has a dropdown menu with 'Yes' selected. There is an 'Add' button and a 'Continue' button at the bottom left of the form. The 'Continue' button is highlighted with a yellow border.

5. In the Personal Information page, scroll down to the end and select **Continue**

Dependents

Add

Continue

Job Information ✓

Compensation Information ✓

- In the Job Information page, locate the Position field. Select the dropdown and select the **Consulting Manager - Canada (GCS_MGR_CAN)** vacant position.

Job Information
✓

Target Position

Incumbent of Parent Position

No Selection

Position

No Selection

▼

Consulting Manager - Canada (GCS_MGR_CAN)
position Criticality.Label:null To be hired:Yes

Position Entry Date

MMM dd, yyyy

- The position to job information propagation business rule will autofill some of the organizational and job details. Scroll down to the bottom of the page and select **Continue**.
- On the Compensation Information page, scroll down to the bottom of the page and select **Continue** or **Submit**.

Payment Information

Add

Continue

Cancel
Save Draft
Submit

9. You will be presented with a dialog to confirm your request. Select **Confirm**.


Please confirm your request

Submitting New Hire request for Michelle Gartner.


Enter your comment here


[Hide workflow participants](#)

Approvers

1  **Charles Chambers**
Global VP - Consulting Services

CC

 **Marcia Barista**
VP, Talent

 [Confirm](#) [Cancel](#)

10. A workflow will be initiated.

[Back to: Admin Center](#)

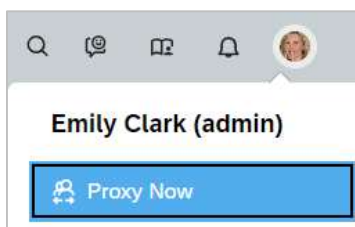
Add New Employee

✔ **Workflow is created for this action.**

You May Also

[Add another employee](#)


11. Select *Proxy Now* on the name menu, to proxy as **Charles Chambers** and approve the workflow.



12. You can type **cham** which should display Charles Chambers on the suggested results.

Select Target User

Please enter target user name:*




Charles **Chambers** (cchambers)

Global VP - Consulting Services, London,
Consulting Services

13. Select Target User.

Select Target User

Please enter target user name:*



Charles **Chambers** (cchambers)

Global VP - Consulting Services, London,
Consulting Services

14. Make sure to select **OK** once you selected the employee from the results.

Select Target User

Please enter target user name:*


OK

Cancel

15. In the Home Page, locate the engagement card under *Approvals*. Select the dropdown option beside the checkmark to see the **Approve** option and select it.

Approvals

New Hire



Michelle Gartner

Effective On Jul 5, 2023




Submitted On Jul 5, 2023

Submitted By

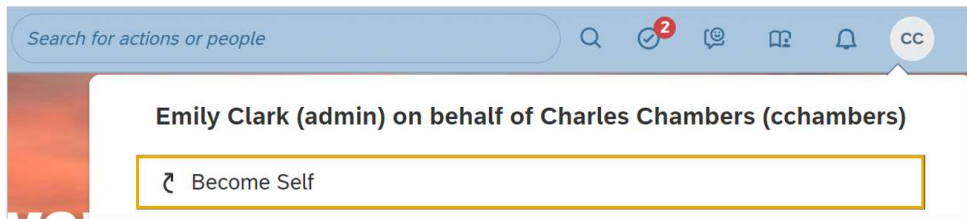
[View Details](#)

Approve

Approve with Comments

16. In the name menu, select **Become Self** to navigate back as the administrator.




In this activity, you have successfully hired an employee from *Manage Pending Hires* to become the incumbent of the position.

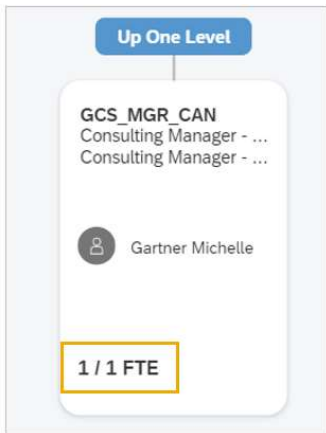
LAB ACTIVITY #3 – Verify TBH Status Adaptation in Position

In this activity, you will verify that the position is now filled after hiring the employee and the TBH status is back to No. You will also test one of the Position Management settings you enabled in activity #1 to Set or Reset 'To Be Hired' Status if an Incumbent's 'FTE' is changed, updating the Standard Hours field in Job Information to trigger the calculation of the new FTE value and confirm the Position updates back to TBH.

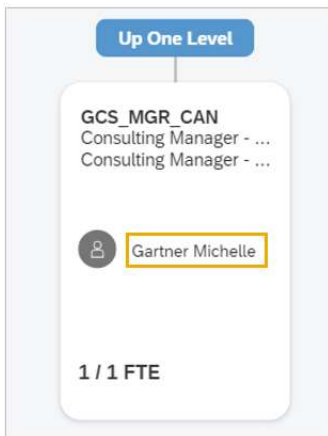
1. Select the Position Org Chart Quick Action.



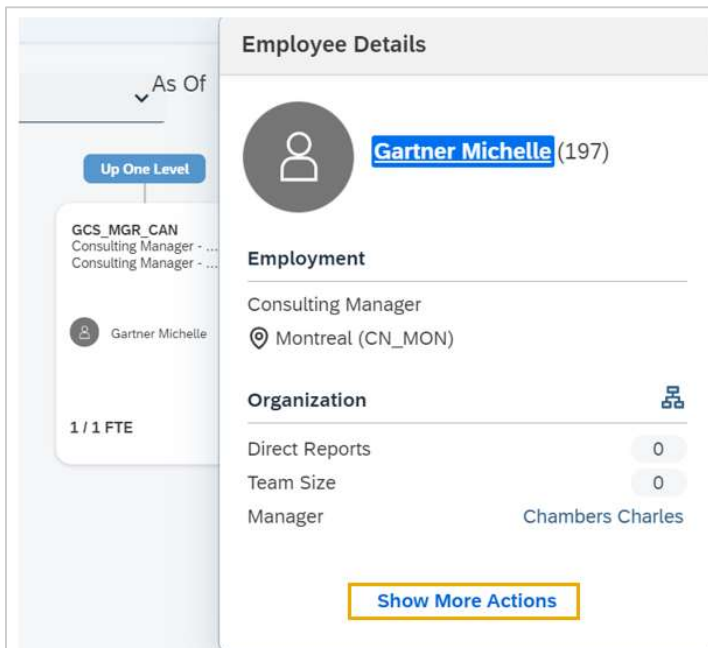
2. Verify that the position **GCS_MGR_CAN** is now filled (1/1 FTE) and the TBH status has changed to No. Notice the TBH icon  is no longer displayed.



3. Select the incumbent name **Michelle Gartner** to open the Employee Details



4. Select **Show More Actions**



5. Select **Change Job and Compensation Info**

Employee Details

Gartner Michelle (197)

Employment

Consulting Manager
Montreal (CN_MON)

Organization

Direct Reports: 0
Team Size: 0
Manager: Chambers Charles

Actions Go To

Change Job and Compensation Info Employment Details
Spot Bonus Add: Global Assignment Details

6. Select **Job Information** and set the first day of the current month as the effective date.

Change Job and Compensation Info

▼ What would you like to change?

☒ Job Information
Change employee's job data, time information, and other information.

☐ Job Relationships
Specify the employer's HR Business Partner, legal advisors, and others besides the primary manager.

☐ Compensation Information
Change the salary, bonus, eligibility for benefits, and other information.

When would you like your changes to take effect? *

Oct 01, 2023

7. Locate the **Standard Weekly Hours** field and change the value to **25**. A business rule will automatically calculate the new FTE and update the value from 1 to 0.62

Job Information

Supervisor: Chambers Charles, Global VP - Con...

Job Classification*: Consulting Manager (GCS_Mgr)

Job Title: Consulting Manager

Local Job Title:

Pay Grade: Salary Grade 10 (GR-10)

Regular/Temporary: Regular

Standard Weekly Hours: 25 (40)

Working Days Per Week: 0

FTE: 0.62 (1)

8. Select **Save**. You will be presented with a dialog to confirm your request. Select **Confirm**. A workflow will be initiated. A **Standard Hours Changed** workflow will be initiated to approve the transaction. The approver of the workflow will be a Dynamic Group (Talent Approval)

Please confirm your request

Submitting Standard Hours Changed request for Gartner Michelle.

Enter your comment here

[Hide workflow participants](#)

Approvers

1 Talent Approval

CC

Chambers Charles
Global VP - Consulting Services

Confirm **Cancel**

9. Select Proxy Now to proxy as one of the Talent Approval group members (you can use Alex Anderson). Select **OK**.

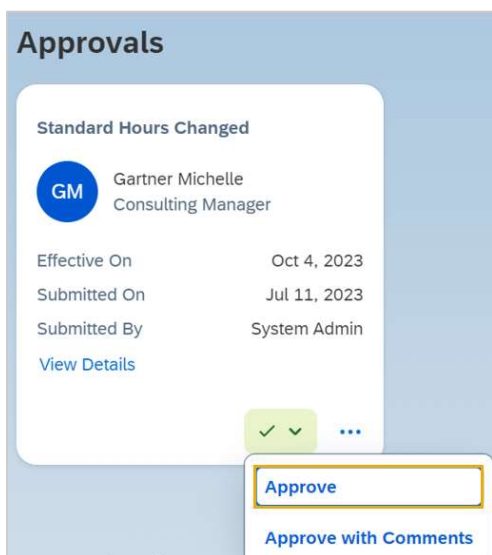
Select Target User

Please enter target user name:*

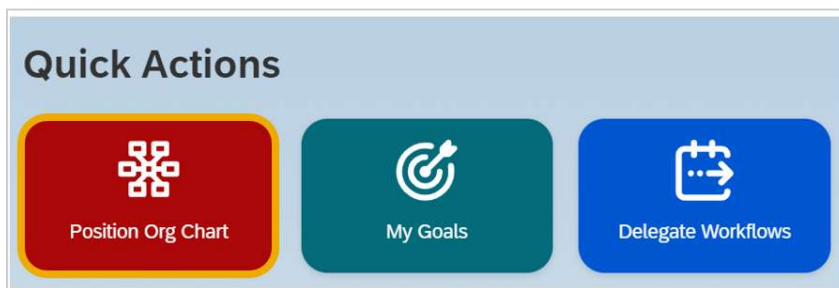
Anderson Alex

OK **Cancel**

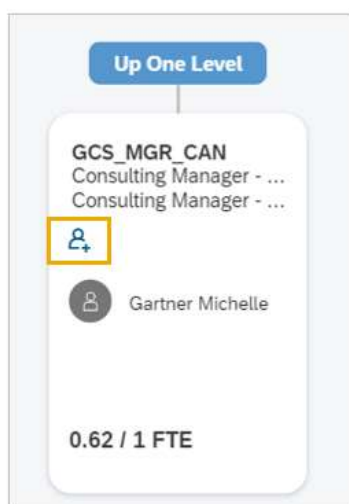
10. On the *Approvals* section in the Home Page, locate the **Standard Hours Changed** workflow and select the option **Approve**.



11. Select **Become Self** to navigate back as an administrator.
12. Access the **Position Org Chart** using the Quick Action or Action Search bar.



13. Verify the Position **GCS_MGR_CAN** is back to TBH (To Be Hired) because of the incumbent's FTE change in Job Information.





In this activity, you have successfully verified that the position is now filled after hiring the employee and the TBH status is back to No, and tested one of the Position Management settings you enabled in activity #1 to Set or Reset 'To Be Hired' Status if an Incumbent's 'FTE' is changed, updating the Standard Hours field in Job Information to trigger the calculation of the new FTE value and confirmed the Position updated back to TBH.

LAB ACTIVITY #4 – Update Positions to add Matrix Relationship and validate Capacity Control

In this activity, you will be mass updating some positions to add the Matrix Relationship and set positions to be subject to Capacity Control, and make sure their Planned FTE cannot be exceeded.

NOTE: In some steps below, you will see **XX** to refer to the number of positions being updated using Mass Data Management. It may vary, but the number will be around 20-22 based on the search for positions with **GCS** in their Position ID.

1. Navigate to **Mass Data Management** using Action Search.

2. Select the **Create** button

3. Select the pencil icon, to rename the Mass Data Management request

4. Remove the existing text, type "**HOL102**" and select **Rename**

Rename Mass Change Request

HOL102

Rename

Cancel

- Locate the *Position ID* filter and type **GCS**

Position ID:

GCS

- Select **Go** to start your search

Position ID:

GCS

Go

Adapt Filters

- The results will display a total of **XX** positions. Select the checkbox at the top to select all positions at once.

Positions (20)		
<input checked="" type="checkbox"/>	Position	Start Date
<input checked="" type="checkbox"/>	Regional Director - North America (GCS_DIR_NA)	Jan 1, 1990
<input checked="" type="checkbox"/>	Consulting Manager - Canada (GCS_MGR_CAN)	Jan 1, 1990
<input checked="" type="checkbox"/>	Consulting Manager - Singapore (GCS_DIR_SGP)	Jun 1, 2010

- Select the **Edit** button, located on the right section

Effective Date:*	Status:	Company:	Department:	Position ID:		
Aug 31, 2023				GCS	Go	Adapt Filters

Positions (20)							20 selected	Edit	Discard Modification	↑↓	⚙
<input checked="" type="checkbox"/>	Position	Start Date	Status	Company	Department	Position ID	Matrix Relationship For Position				
<input checked="" type="checkbox"/>	Regional Director - EMEA (GCS_DIR_EMEA)	Jan 1, 1990	Active	Ace Germany (ACE_DEU)	Consulting Services (GCS)	GCS_DIR_EMEA					
<input checked="" type="checkbox"/>	Consulting Manager - France (GCS_MGR_FRA)	Jan 1, 1990	Active	Ace France (ACE_FRA)	Consulting Services (GCS)	GCS_MGR_FRA					
<input checked="" type="checkbox"/>	Consulting Manager - Portugal (GCS_MGR_PRT)	Jan 1, 1990	Active	ACE Portugal (ACE_PRT)	Consulting Services (GCS)	GCS_MGR_PRT					
<input checked="" type="checkbox"/>	Global VP - Consulting Services (GCS_VP)	Jan 1, 1990	Active	Ace UK (ACE_GBR)	Consulting Services (GCS)	GCS_VP					

20 selected
Edit
Discard Modification
↑↓
⚙

9. In the *Editing XX Positions* popup dialog, set *Capacity controlled* to **Yes**.

Editing 20 Positions

Effective Date: Jul 12, 2023

Capacity controlled: Yes

Matrix Relationship For Position Add

Type *	Related Position *	parent
No sel...	No sele...	

Apply
Cancel

10. In the *Matrix Relationship For Position*, add the following details:

- Type: **Matrix Manager**
- Related Position: **VP, Operations (POS-VPOPS)**

NOTE: Select each time. For the *Type*, you will find **Matrix Manager** within the available options. For the *Related Position*, select the same icon to start search and type **VP**, then search, and you will find the **VP, Operations (POS-VPOPS)** in the available results.

Editing 20 Positions

Effective Date: Jul 12, 2023

Capacity controlled: Yes

Matrix Relationship For Position Add

Type *	Related Position *	parent
Matrix ...	VP, Operat	

Apply
Cancel

11. Select **Apply**. The change will run as a draft, and you can preview which positions will be modified from the results or whether there are any errors. A popup will display after the draft run is completed. You can select **OK**.



All Modified (20) Containing errors (0)							Edit Discard Modification ↑↓ ⚙
<input type="checkbox"/>	Position	Start Date	Status	Company	Department	Position ID	Matrix Relationship For Position
<input type="checkbox"/>	Regional Director - North America (GCS_DIR_NA) (Modified)	Jan 1, 1990	Active	Ace USA (ACE_USA)	Consulting Services (GCS)	GCS_DIR_NA	1 (Modified)
<input type="checkbox"/>	Consulting Manager - Canada (GCS_MGR_CAN) (Modified)	Jan 1, 1990	Active	Ace Canada Corp (ACE_CAN)	Consulting Services (GCS)	GCS_MGR_CAN	1 (Modified)

12. Select again all positions. And select **Submit** (at the bottom right corner)

All	Modified (20)	Containing errors (0)	21 selected					Edit	Discard Modification	↕	⚙
<input checked="" type="checkbox"/>	Position	1	Start Date	Status	Company	Department	Position ID	Matrix Relationship For Position			
<input checked="" type="checkbox"/>	Canada (GCS_MGR_CAN) (Modified)		Jul 13, 2023	Active	Ace Canada Corp (ACE_CAN)	Consulting Services (GCS)	GCS_MGR_CAN	1			
<input checked="" type="checkbox"/>	Consulting Manager - Canada (GCS_MGR_CAN-187106) (Modified)		Jul 13, 2023	Active	Ace Canada Corp (ACE_CAN)	Consulting Services (GCS)	GCS_MGR_CAN-187106	1			
<input checked="" type="checkbox"/>	Regional Director - EMEA (GCS_DIR_EMEA) (Modified)		Jul 13, 2023	Active	Ace Germany (ACE_DEU)	Consulting Services (GCS)	GCS_DIR_EMEA	1			
										2	Submit Cancel

13. In the next popup dialog, select **OK** to Submit the mass change request with **XX** selected positions.

Confirmation

Submit the mass change request with 20 selected positions?

OK

Cancel

14. You should see a confirmation that the mass change request is submitted

Success

Your mass change request is submitted successfully. You will receive an email notification shortly.

OK

15. Refresh the page, until the status changes to **Processed Successfully**. You may need to select it a few times



16. The request will show with a **Processed Successfully** status when finished.

All Requests (1)	My Requests (1)	Requests Shared with Me (0)	Create Share Delete ↺ ↻				
<input type="checkbox"/>	Title	Changes	Effective Date	Date Created	Date Modified	Status	
<input type="checkbox"/>	HOL102 Position Changes 1427491509866	20 Positions	Jul 12, 2023	Jul 12, 2023 at 11:00 AM by adminJMT	Jul 12, 2023 at 11:07 AM by adminJMT	Processed Successfully	Download Log >



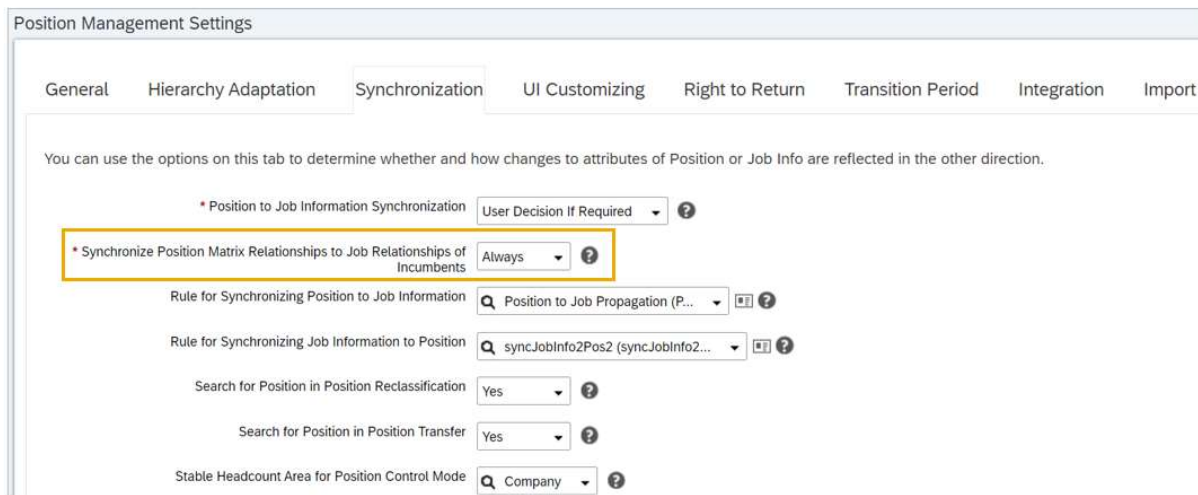
In this activity, you have successfully submitted a Mass Change request to update all the GCS positions (**XX**) with a new Matrix Relationship for Position and subject to Capacity Control, using the Mass Data Management tool.

LAB ACTIVITY #5 – Verify Position Mass Changes (Matrix Position).

In this activity, you will verify that the GCS Positions updated in previous activity will show a Position Matrix Relationship with the VP, Operations position.

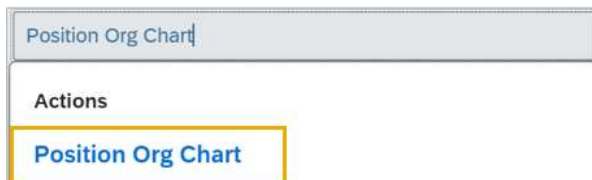
NOTE: In the image below, you can see the Position Management Setting that ensures Synchronization between Position Matrix Relationship and the Job Relationships HRIS Element.

The option is already set to **Always** in *Position Management Settings* > *Synchronization* tab in your instance as per best practice recommendation.



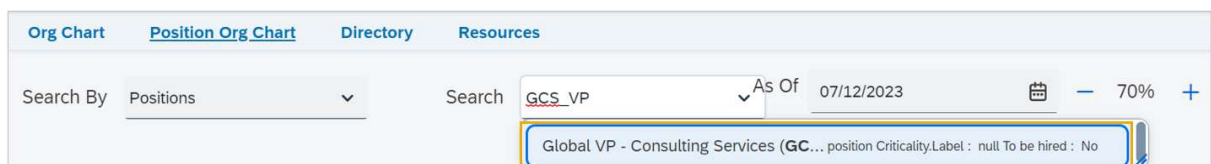
The screenshot shows the 'Position Management Settings' interface with the 'Synchronization' tab selected. The 'Synchronize Position Matrix Relationships to Job Relationships of Incumbents' option is highlighted with a yellow box and set to 'Always'. Other settings include 'Position to Job Information Synchronization' set to 'User Decision If Required', and various rules for synchronizing position and job information.

1. Navigate to *Position Org Chart* using the available options (action search, quick action in Home Page or via Home > Company Info)



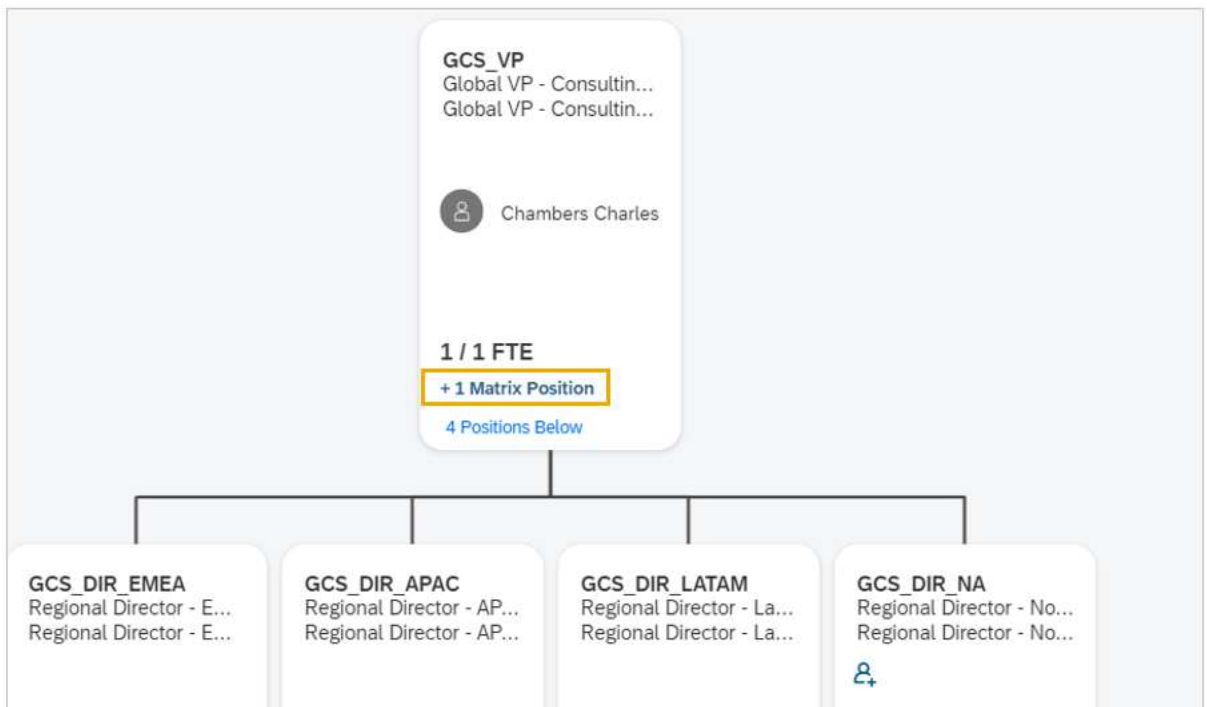
The screenshot shows the 'Position Org Chart' action highlighted in a yellow box within the 'Actions' section of the 'Position Org Chart' menu.

2. Search for one of the positions included in the Mass Change. You can try with **Global VP – Consulting Services (GCS_VP)**. Type **GCS_VP** in the *Search* field.

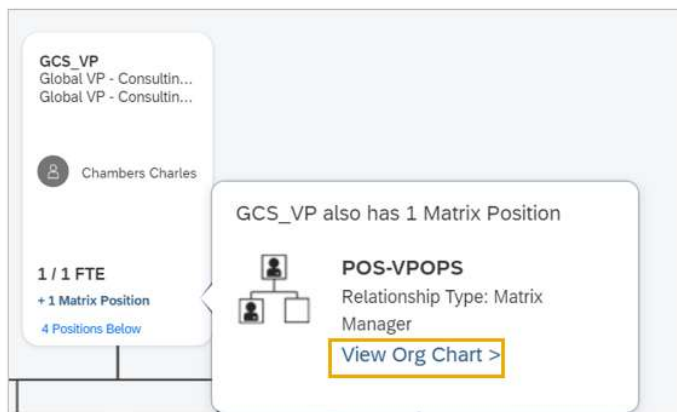


The screenshot shows the 'Position Org Chart' search results. The search field contains 'GCS_VP' and the results list shows 'Global VP - Consulting Services (GCS_VP)' highlighted with a yellow box.

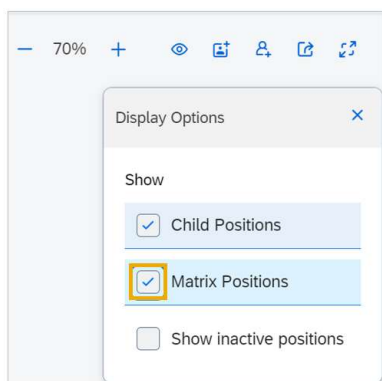
3. Verify there is now a **+1 Matrix Position** option in the Position card. Select this option



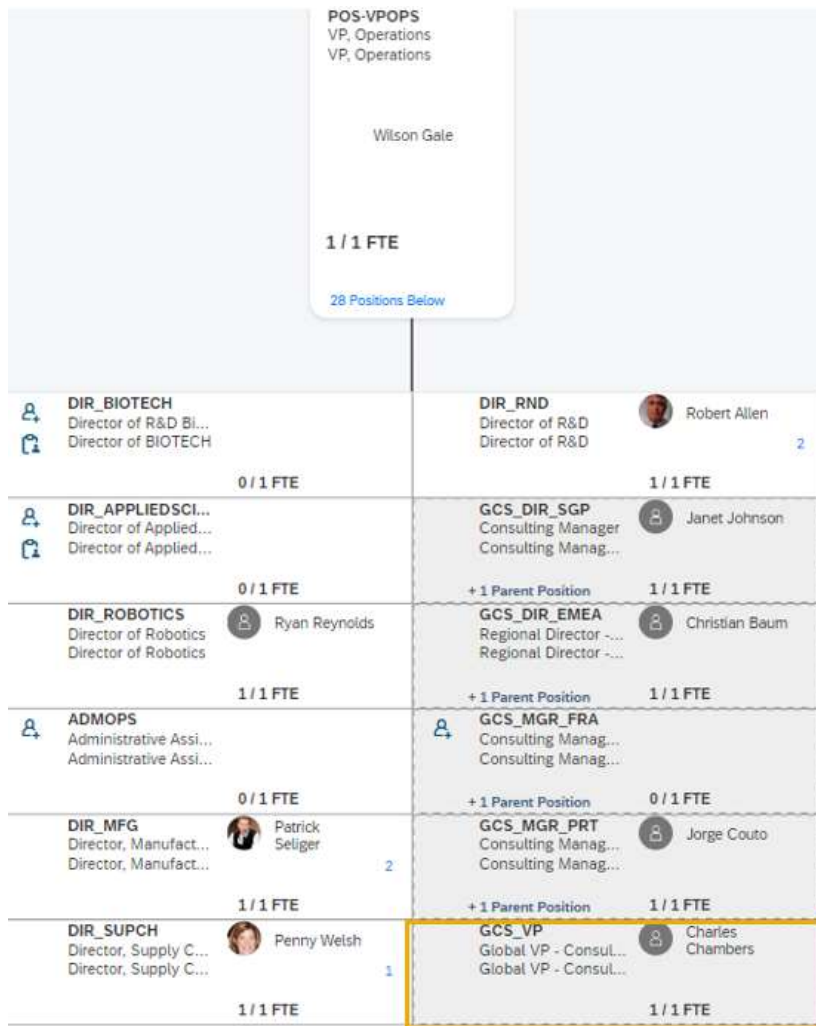
4. Select **View Org Chart >**



5. The matrix positions should be visible, since this option is already selected in the Position Org Chart



- Notice the Position Org Chart now displays Child and Matrix Positions and *GCS_VP* is a Matrix Position for *POS-VPOPS*.



- Select **Charles Chambers** to open the Employee Details card.

The screenshot shows a list of employees on the left and a detailed view of Charles Chambers on the right. In the list, Charles Chambers is highlighted with a yellow box. A line connects this box to the pop-up window. The pop-up window has a title 'Employee Details' and contains the following information:

- Employee Details:** Charles Chambers (cchambers), cchambers@ace.com
- Employment:** Consulting Services (UK_LON)
- Organization:** Direct Reports: 4, Team Size: 19
- Actions:** Show More Actions

8. Select the employee's name to navigate to the Employee File.

The screenshot shows the 'Employee Details' page for Charles Chambers. The name 'Chambers Charles' is highlighted with a blue box. The page contains the following information:

- Employee Details:** Chambers Charles (cchambers), cchambers@ace.com
- Employment:** Global VP - Consulting Services, London (UK_LON)
- Organization:** Direct Reports: 4, Team Size: 19
- Actions:** Show More Actions

9. Locate the **Employment Information** and select the dropdown to expand the sub-sections.

Chambers Charles
(cchambers) ▾

Global VP - Consulting Services
Consulting Services (GCS), GCS Europe, Middle East & Africa (GCS_EMEA)
London (UK_LON) (Europe/London)
Local time: Wednesday, 10:46:28 AM
cchambers@ace.com

f in

Personal Information ▾ Employment Information ▾ Talent Profile ▾

10. Select the **Job Relationships** subsection.

Job Information

Organizational Information

Job Relationships

Employment Details

Compensation Information

11. Verify that the incumbent of the Parent Matrix Position (Wilson Gale) is now the new Matrix Manager in Job Relationships. The Position Hierarchy has synced the Reporting Hierarchy to update the Job Relationships based on Position changes.

Job Relationships

Job Relationships ✎ ↺

Effective as of: August 10, 2023

Wilson Gale
Matrix Manager

Connie Butler
HR Manager



In this activity, you have successfully confirmed the Mass Changes in the previous activity created a new Matrix Position Relationship and changes were synced to the Reporting Hierarchy based on the Leading Hierarchy (Position) and created a new Matrix Manager in the *jobRelationsInfo* HRIS Element.

LAB ACTIVITY #6 – Verify Position Mass Changes (Capacity Control)

In this activity, you will confirm the Mass Changes in a previous activity to update the value of the boolean field *positionControlled* (Capacity Control) in Position from *No* to **Yes** and test the behavior in MSS UI.

1. Continue from the previous activity in Charles Chambers Employee File.
2. Scroll up to the top of the page and select under **Actions > Change Job and Compensation Info**.



3. Select **Job Information** and set today's date as the effective date.

Change Job and Compensation Info

▼ What would you like to change?

☒ Job Information
Change employee's job data, time information, and other information.

☐ Job Relationships
Specify the employer's HR Business Partner, legal advisors, and others besides the primary manager.

☐ Compensation Information
Change the salary, bonus, eligibility for benefits, and other information.

When would you like your changes to take effect? *

Oct 04, 2023

4. Scroll down to locate the Standard Weekly Hours field and change the value from 40 to 42. Click away and check how a business rule re-calculates the FTE value from 1 to 1.05

Change Job and Compensation Info

Job Information

Supervisor: No Manager

Job Classification*: Global VP - Consulting Services (GCS_VP)

Job Title: Global VP - Consulting Services

Local Job Title:

Pay Grade: No Selection

Regular/Temporary: Regular

Standard Weekly Hours: 42

Working Days Per Week: 5


FTE: 1.05

5. Select **Save**

6. Verify that an error message displays, since the position is subject to Capacity Control and the current FTE value (1.05) cannot exceed the Planned FTE for the Position (1). Select **Close** once you have read the message.

Messages


Job Information



Assigning this employee to the selected position would exceed the FTE value of the position on 1 occasions in the period from 10/04/2023 until 12/31/9999.
Please choose another position or change the FTE value of the employee.

Close

7. Select **Cancel**
8. Select **Don't Save**.

 Please confirm

You have unsaved changes. All your changes will be lost.

Save

Don't Save

Cancel



In this activity, you have successfully checked that the Position is subject to Capacity Control and therefore, the current FTE value cannot exceed the Planned FTE value of the position which the incumbent is assigned.

LAB ACTIVITY #7 – Position Transfer and Follow Up Process

In this activity, you will update the *Supervisor* field in Job Information and execute a Position Transfer. When updating the Supervisor field in Job Information, the system will determine a *Supervisor Change Only* event reason. To ensure this Event Reason triggers a *Follow Up activity in Position* to execute a Position Transfer, it needs to be selected in the Event Reason details.

With 1H 2023, [Position transfer process is streamlined](#) to improve data consistency and ensure that the position hierarchy is updated correctly.

Please note: We recommend that the supervisor change should be done at Position Level and not from the job Information of the incumbent. Please refer to the Employee Central Position Management Design Consideration Implementation Design Principles document for leading practices.

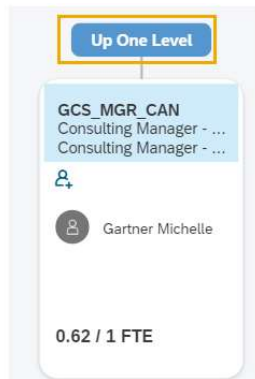
The screenshot below shows this example:

The screenshot displays the SAP configuration page for the Event Reason 'Supervisor Change Only (JOBSUPRV)'. The page includes a header with the title and an 'Insert New Record' button. Below the title, it shows the effective date as 01/01/1970 and a note that blue text indicates a change on this date. The configuration details are as follows:

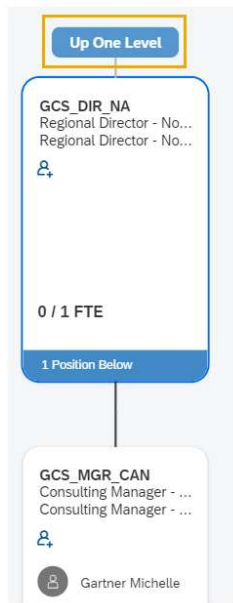
Event Reason ID	JOBSUPRV
Event Reason Name	Supervisor Change Only
Description	
Status	Active
Event	Data Change
Employee Status	No Selection
Follow-Up Activity in Position	Position Transfer
Payroll Event	
Display in Internal Job History Portlet	No

The 'Follow-Up Activity in Position' field is highlighted with a yellow box. The page footer indicates it was updated by System Admin (adminJMT) on Tuesday, July 11, 2023 11:31:52 AM EDT.

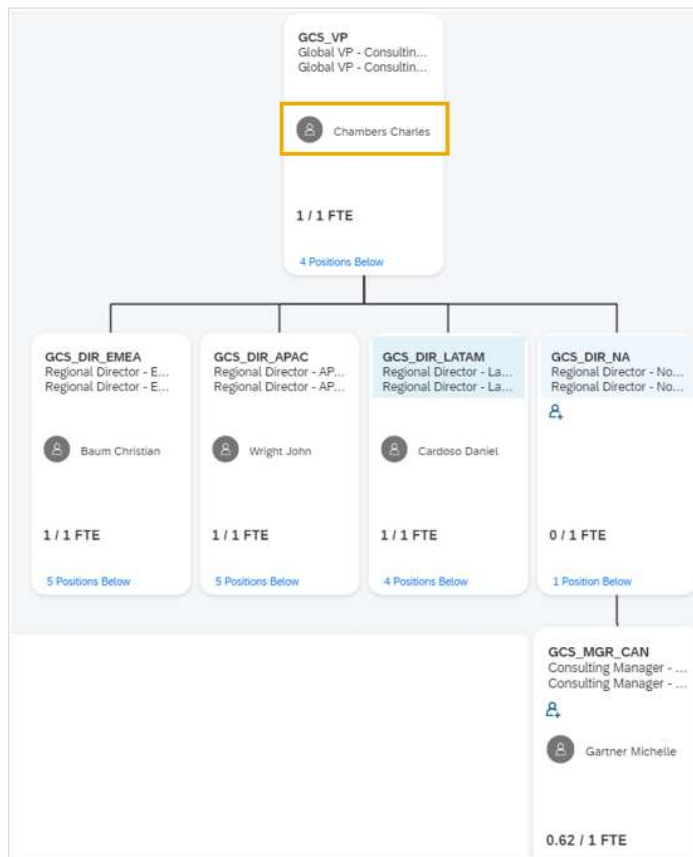
1. Navigate to the Position Org Chart, using the options learned (Quick Action, Action Search or Company Info)
2. Search for the position GCS_MGR_CAN (Consulting Manager, Canada), and select **Up One Level** to navigate the position hierarchy.



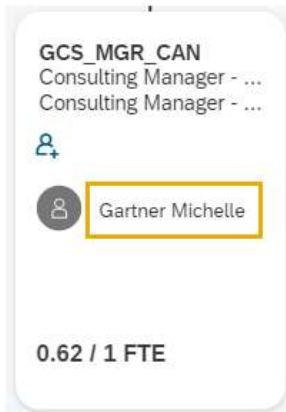
3. Notice the Parent Position (GCS_DIR_NA) is vacant. Select Up One Level again to navigate further up.



4. The incumbent of the Parent Parent Position (GCS_VP) is Charles Chambers, who is Michelle's supervisor.



4. Scroll down to the **GCS_MGR_CAN** position and select the incumbent name **Michelle Gartner** to open the Employee Details



5. Select **Show More Actions**

As Of


Up One Level

GCS_MGR_CAN
Consulting Manager - ...
Consulting Manager - ...

Gartner Michelle

1 / 1 FTE

Employee Details

 **Gartner Michelle** (197)

Employment

Consulting Manager
Montreal (CN_MON)


Organization

Direct Reports 0
Team Size 0
Manager Chambers Charles

Show More Actions

6. Select **Change Job and Compensation Info**

Employee Details

 **Gartner Michelle** (197)

Employment

Consulting Manager
Montreal (CN_MON)

Organization

Direct Reports 0
Team Size 0
Manager Chambers Charles

Actions Go To

Change Job and Compensation Info Employment Details
Spot Bonus Add: Global Assignment Details

7. Select **Job Information** and set today's date as the effective date.

Change Job and Compensation Info - Gartner Michelle

▼ What would you like to change?

☒ Job Information
Change employee's job data, time information, and other information.

☐ Job Relationships
Specify the employer's HR Business Partner, legal advisors, and others besides the primary manager.

☐ Compensation Information
Change the salary, bonus, eligibility for benefits, and other information.

When would you like your changes to take effect?*

Oct 04, 2023

8. Navigate to the *Supervisor* field, clear the existing value, and type **Daniel Cardoso**. The Regional Director – Latin America will display on the results.

Job Information

Supervisor

Daniel Cardoso

Daniel Costa Cardoso (dcardoso)
Regional Director - Latin America, Sao Paolo

Job Classification*

Consulting Manager (GCS_Mgr)

Pay Grade

Salary Grade 10 (GR-10)

Regular/Temporary

Regular

9. Select Daniel Costa Cardoso as the new Supervisor.

Job Information

Supervisor

Daniel Cardoso

Daniel Costa Cardoso (dcardoso)
Regional Director - Latin America, Sao Paolo

Job Classification*

Consulting Manager (GCS_Mgr)

Pay Grade

Salary Grade 10 (GR-10)

Regular/Temporary

Regular

10. A new switch will display to select whether the Position currently assigned should move below the new manager's position. Do not select and leave it as **No**.

Job Information

Supervisor
Cardoso Daniel, Regional Director - ...

Chambers Charles, Global VP—Consulting Services, London

Job Title
Consulting Manager

Local Job Title

Pay Grade
Salary Grade 10 (GR-10)

Regular/Temporary
Regular

Job Classification *
Consulting Manager (GCS_Mgr)

Move currently assigned Position below new Manager's Position
☐ No

11. Scroll down to locate the **Save** button and choose it. A *Supervisor Change Only* request will be displayed since this transaction will require an approval process.

12. Select **Confirm** to submit the workflow.


Please confirm your request

Submitting Supervisor Change Only request for Gartner Michelle.

Enter your comment here

[Hide workflow participants](#)

Approvers


1  **Chambers Charles**
Global VP - Consulting Services

[Confirm](#) [Cancel](#)

13. Proxy as *Charles Chambers* and locate the workflow to be approved in your Home Page.

Approvals

Supervisor Change Only

 **Gartner Michelle**
Consulting Manager

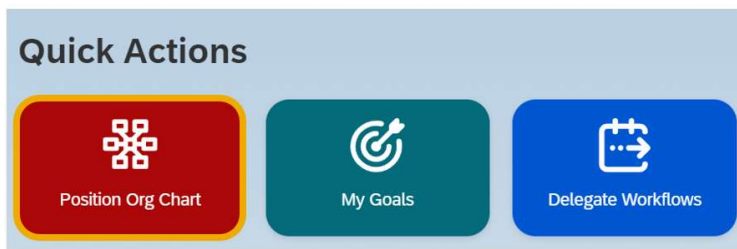
Effective On Oct 4, 2023
Submitted On Jul 11, 2023
Submitted By System Admin

[View Details](#)

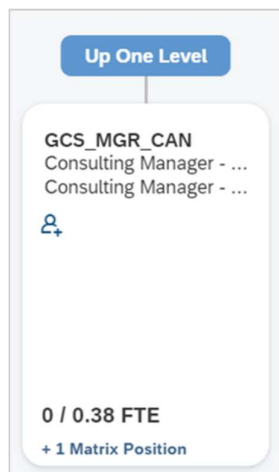
[Approve](#)
[Approve with Comments](#)

14. Select **Become Self** to navigate back as the administrator.

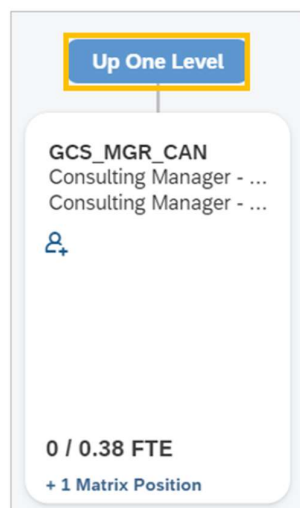
15. Navigate to the Position Org Chart selecting the Home Page Quick Action



16. If not already, search for **GCS_MGR_CAN** position and verify the position under GCS_DIR_NA is now back to TBH status, and a new position was created under Daniel Cardoso based on the change of Supervisor.



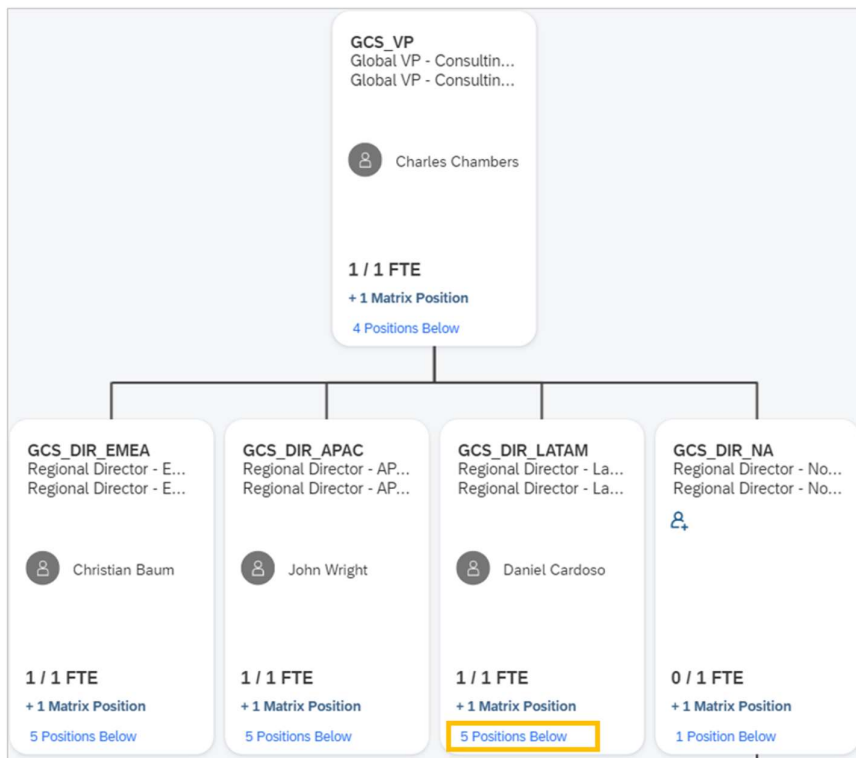
16. In the same position, GCS_MGR_CAN, select **Up One Level** to navigate the position hierarchy.



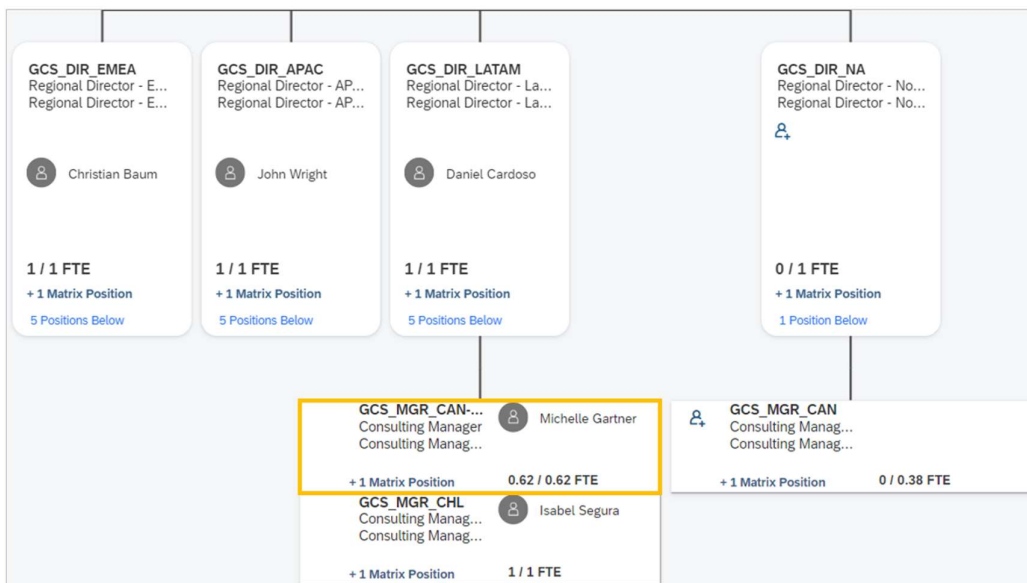
17. Notice the Parent Position (GCS_DIR_NA) is vacant. Select **Up One Level** again to navigate further up.



18. Select **5 Positions Below** on Daniel Cardoso Position Card (GCS_DIR_LATAM)



17. Verify that a new position has been created under the new Supervisor, as per the follow up process *Position Transfer* that was assigned to the Event Reason for Supervisor Change Only.





In this activity, you have successfully updated the Supervisor field in Job Information to execute a Position Transfer. If there are errors during the Position Follow up processes, the system creates an admin alert type **Position Follow-Up Admin Alert**. Admin can subscribe to be notified when an **Admin Alert** is generated. An example is shown on the screen below.

Admin Alerts

Admin Alert Type

Position Follow-Up Processes (14)

☐ Show also inactive Admin Alert Types

Alerts (0 selected)

Action

Refresh

<input type="checkbox"/>	<input checked="" type="checkbox"/> Johnson Hugh	Jul 19, 2023	1	Return to Home Position with Right to Return	POSN20016		Hierarchy Adaptation	Delete, Retigger	
<input type="checkbox"/>	Johnson Hugh	Jul 19, 2023	1	Return to Home Position with Right to Return		Murray Brendon			No event reason or event found for user NZ0016.
<input type="checkbox"/>	Johnson Hugh	Jul 19, 2023	1	Return to Home Position with Right to Return		Reid Victoria			No event reason or event found for user NZ0017.
<input type="checkbox"/>	Johnson Hugh	Jul 19, 2023	1	Return to Home Position with Right to Return		Armstrong Rowan			No event reason or event found for user NZ0020.
<input type="checkbox"/>	Johnson Hugh	Jul 19, 2023	1	Return to Home Position with Right to Return		Davis Courtney			No event reason or event found for user NZ0019.
<input type="checkbox"/>	> Ng Jasmine	Jul 31, 2023	1	Ending a Global Assignment			Create Return to Home Position record	Delete	
<input type="checkbox"/>	> Tao Min	Jul 30, 2023	1	Ending a Global Assignment			Create Return to Home Position record	Delete	
<input type="checkbox"/>	> Reichsteiner Marc	Aug 3, 2023	1	Adding a Global Assignment				Delete, Retigger	
<input type="checkbox"/>	> Ranga Ranga	Nov 1, 2023	1	Ending a Global Assignment			Create Return to Home Position record	Delete	

In this Hands On Lab, you have practiced some of the available Position Management processes and validations in SAP SuccessFactors Employee Central Position Management, including the To Be Hired Status adaptation, Mass Changes, Matrix Position Relationships or Capacity Control.

www.sap.com.