CONFIGURATION DOCUMENT

Purpose

The Configuration document captures the configuration changes done for the Demo Instance for SF IDO Simulation

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1   Purpose

The purpose of the document is to document the configurations done for IDO Simulations.

2   API User

There are different ways of accessing SuccessFactors API. The fastest method is via Basic Authentication via Username and Password. In order to this, an API user must be created.

2.1   Procedure

2.1.1   User Mode and Admin Mode

When creating API users, it is important to understand what the API user will do to identify which mode should be applied.

User Mode Assigned RBP settings determine what entities can be viewed and what can be done with them.

Admin Mode Allows full access to Employee Central OData API entities and operations. This is chiefly used for technical integrations.

2.1.2   Permission Settings

To set-up API user permissions, follow the instructions discussed in note 2732680. Since there will be upserts that will be executed the API user should follow Admin Mode.

3   Custom Fields in Personal Information for Japan

Two custom fields were used under Global Information for Japan: customString13 and customString20

3.1   Use

The customString13 is used to check if the employee has dependent that is challenged while customString20 is used to record Spouse Personal ID in case the spouse is also an employee.

3.2   Procedure

3.2.1   Access Manage Business Configuration

In Manage Business Configuration, expand globalInfo and click globalInfo_JPN
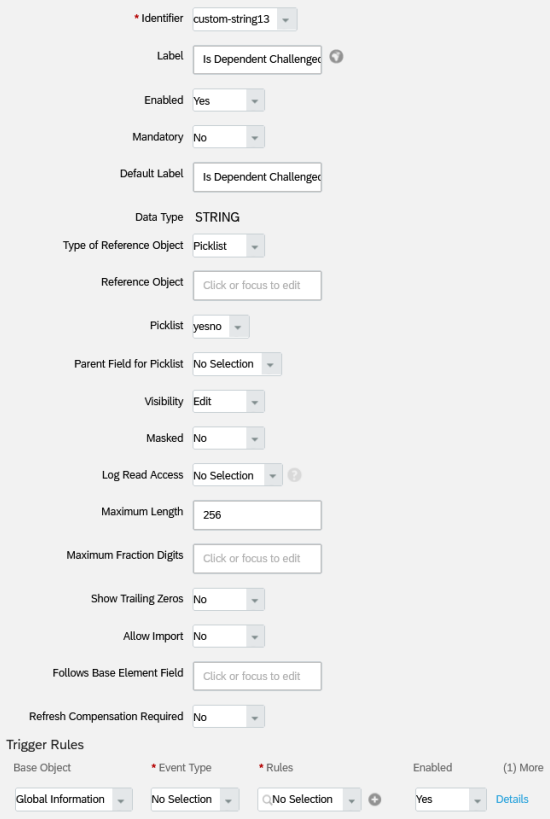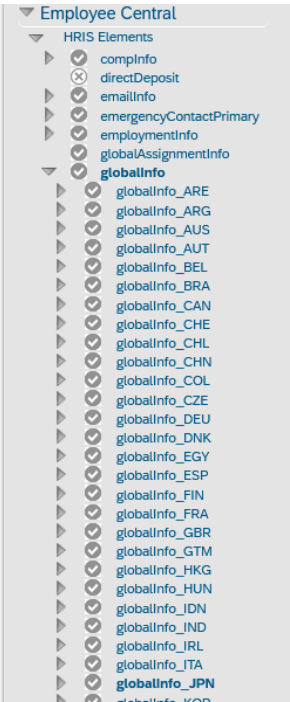
3.2.2 Add the custom fields under Localized HRIS Fields

Under identifier, add custom-string13 with label "Is Dependent Challenged", enabled equal to Yes and mandatory equal to No.

In the Details portion, update with the following:

Add another identifier custom-string20 with label "Spouse Personal ID (If in same company)", enabled equal to Yes and mandatory equal to No.

custom-string20 ▾	Spouse Personal ID (If in 🔾	Yes ▾	No ▾	Details

In the Details portion, update with the following:

* Identifier	custom-string20 ▾
Label	Spouse Personal ID (If in 🔾
Enabled	Yes ▾
Mandatory	No ▾
Default Label	Spouse Personal ID (If in
Data Type	STRING
Type of Reference Object	Employee ▾
Reference Object	Click or focus to edit
Picklist	No Selection ▾
Parent Field for Picklist	No Selection ▾
Visibility	Edit ▾
Masked	No ▾
Log Read Access	No Selection ▾
Maximum Length	256
Maximum Fraction Digits	Click or focus to edit
Show Trailing Zeros	No ▾
Allow Import	No ▾
Follows Base Element Field	Click or focus to edit
Refresh Compensation Required	No ▾

Trigger Rules

Base Object	* Event Type	* Rules	Enabled	(1) More
Global Information ▾	No Selection ▾	No Selection ▾ ➕	Yes ▾	Details

4 Willingness to be Transferred

4.1 Use

A custom MDF object must be created to capture the willingness of the employee for transfer. Employees can update this object to show whether they are willing to be included in the scheduled transfer of employees.

4.2 Procedure

4.2.1 Create MDF Object

In Create Object Definition, create cust_trasnfer_willingness with the following details:

Object Definition: cust_transfer_willingness (cust_transfer_willingness)

* Code	cust_transfer_willingness
* Effective Dating	None
API Visibility	Editable
* Status	Active
MDF Version History	No
Default Screen	
Label	cust_transfer_willingness
Description	Employee's willingness to Transfer
API Sub Version	V1.1
Subject User Field	User
Workflow Routing	
Pending Data	No
Todo Category	Generic Object Change Requests

Maintain the following fields:

Name	Database Field Name	Maximum Length	Data Type
User	externalCode	100	User
externalName	externalName	128	String
cust_willingness	sfFields.sfField1	5	Boolean

4.2.2 Create the corresponding UI

In Manage Configuration UI, create new UI transfer_willlingness with the following set-up:

4.2.3 Update Permissions

Update the necessary Permission Roles in Manage Permission Roles to include Read and Update access to the new custom MDF object

4.2.4 Update People Profile

In Configure People Profile, create a new sub section Willingness to Transfer under Talent Profile section.

Edit the block of the sub section and add Live Profile MDF Information. Assign transfer_willingness for the MDF ID.

5   Disciplinary Action

5.1 Use

A custom MDF object must be created to capture the disciplinary logs of the employees. The custom MDF will capture also other affected employees caused by the action of the employee.

5.2 Procedure

5.2.1 Create MDF Object

In Create Object Definition, create cust_DisciplinaryAction with the following details:

Object Definition: cust_DisciplinaryAction (cust_DisciplinaryAction)

* Code	cust_DisciplinaryAction
* Effective Dating	Basic
API Visibility	Editable
* Status	Active
MDF Version History	No
Default Screen	
Label	cust_DisciplinaryAction
Description	
API Sub Version	V1.1
Subject User Field	User
Workflow Routing	
Pending Data	No
Todo Category	Generic Object Change Requests

Maintain the following fields:

Fields

Name	Database Field Name	Maximum Length	Data Type
User	externalCode	100	User
externalName	externalName	128	String
effectiveStartDate	effectiveStartDate	10	Date
cust_Reason	sfFields.sfField1	38	Picklist
cust_Severity	sfFields.sfField2	38	Picklist
cust_InitiateVerbal	sfFields.sfField3	5	Boolean
cust_VerbalComments	sfFields.sfField4	500	String
cust_EEAcknowledgement	sfFields.sfField5	5	Boolean
cust_Attachments	sfFields.sfField6	38	Attachment
cust_dateofincident	sfFields.sfField7	35	DateTime
cust_IncidentStatus	sfFields.sfField8	38	Picklist
cust_IncidentDetails	sfFields.sfField9	500	String
cust_step	sfFields.sfField10	38	Picklist
cust_AffectedEmployee	sfFields.sfField11	100	User

5.2.2 Create the corresponding UI

In Manage Configuration UI, create new UI disciplinary_log with the following set-up:

5.2.3   Update Permissions
Update the necessary Permission Roles in Manage Permission Roles to include Read and Update access to the new custom MDF object

5.2.4   Update People Profile
In Configure People Profile, create a new section Disciplinary Log.

Edit Section: Disciplinary Log

☑ Show this section on the profile

Disciplinary Log | Apply to All Languages

Remove Section

Under this section, create a Disciplinary Log Subsection.

Edit Subsection: Disciplinary Log

☑ Show this subsection on the profile

Disciplinary Log | Apply to All Languages

Remove Subsection

Edit the block of the sub section and add Live Profile MDF Information. Assign transfer_willingness for the MDF ID.

≡ Disciplinary Log | ≡ Live Profile MDF Information | Place block here

Edit Block: Live Profile MDF Information
Block Id: **block1636** Block Type: **MDF_BLOCKS**

Links:

⊕ Add

MDF Screen ID:

disciplinary_log

Remove Block

6   Sample API Postman calls.

6.1   Use
This section will show sample API call using Postman. The API URLs for different data centers can be taken from SAP Note 2215682.

6.2   Job Information (EmpJob entity)

https://api40sales.sapsf.com/odata/v2/EmpJob?$select=userId,department,division,man agerId,startDate,endDate,event,eventReason,seqNumber,position,payScaleType,payScal eArea,payScaleLevel,payScaleGroup,payGrade,timezone,employmentNav/personIdExter nal,jobCodeNav/jobLevelNav/localeLabel&$format=json&$orderby=userId,startDate&$ex pand=employmentNav,jobCodeNav/jobLevelNav

Events can be filtered as well to check if employee is on leave of absence (event equals 3671) or if employee was already transferred within the year (event equals 3681).

6.3   Personal Information (PerPersonal entity)

https://api40sales.sapsf.com/odata/v2/PerPersonal?$select=personIdExternal,lastName,f irstName,middleName,gender,localNavJPN/customString13Nav/localeLabel,localNavJPN /customString20&$orderby=personIdExternal&$format=json&$expand=localNavJPN,loc alNavJPN/customString13Nav

In this API call, you can extract the custom fields created for Spouse Employee ID (customString20) and if employee has a challenged dependent (customString13).

6.4   Position Information (Position entity)

https://api40sales.sapsf.com/odata/v2/Position?$select=code,positionTitle,effectiveStart Date,effectiveEndDate,effectiveStatus,incumbent,company,companyNav/name,business Unit,businessUnitNav/name,division,divisionNav/name,department,departmentNav/name ,location,jobCode,jobTitle,parentPosition/code&$format=json&$expand=parentPosition, departmentNav,divisionNav,businessUnitNav,companyNav

This API call will return available positions as well other details related to organization. This can be used to get the position code which will be used to get competencies of the position.

6.5   Department Information (FODepartment entity)

https://api40sales.sapsf.com/odata/v2/FODepartment?$select=externalCode,startDate,de scription,parent,cust_toDivision/externalCode,cust_toDivision/description,cust_toDivisi on/parent&$expand=cust_toDivision&$format=json

This API call will return details of a department as well as to which Division it belongs and its parent Department.

6.6   Willingness to Transfer Information (cust_transfer_willingness entity)

https://api40sales.sapsf.com/odata/v2/cust_transfer_willingness?$select=User,cust_willi ngness&$format=json

This API call will capture the data on the custom MDF created for employees' willingness to be transferred.

6.7   Disciplinary Information (cust_DisciplinaryAction entity)

https://api40sales.sapsf.com/odata/v2/cust_DisciplinaryAction?$select=User,cust_Reas on,cust_Severity,cust_dateofincident,cust_AffectedEmployee,cust_IncidentStatus&$for mat=json

This API call will capture the date on the custom MDF created to store employees' disciplinary logs.

6.8 Photo Information (Photo entity)

https://api40sales.sapsf.com/odata/v2/Photo?$select=userId,photo,mimeType&$format=j son&$filter=photoType eq '26'

This API call will extract profile photos of the employees.

6.9 Position Competency Information (PositionEntity entity)

https://api40sales.sapsf.com/odata/v2/PositionEntity?$select=positionNav/code,position Nav/externalName_defaultValue,positionCompetencyMappings/competencyNav/name_d efaultValue,positionCompetencyMappings/rating_defaultValue&$expand=positionNav,p ositionCompetencyMappings/competencyNav&$format=json

This API call will capture the competencies mapped to the positions via Job Profile builder. The positionNav/code will be equal to the code from Position Information call (6.4).

6.10 Form Template Information (FormTemplate entity)

https://api40sales.sapsf.com/odata/v2/FormTemplate?$select=formTemplateId,formTem plateName&$format=json&$filter=formTemplateType eq 'Review'

This API call will capture all the performance review templates that are in the system. This will help user select which performance review form should be selected in terms of identifying employee's competencies.

6.11 Competency Results Information (FormContent entity) - to be finalized

https://api40sales.sapsf.com/odata/v2/FormContent?$select=formHeader/formSubject/u serId,pmReviewContentDetail/competencySections/competencies/name,pmReviewCont entDetail/competencySections/competencies/itemId,pmReviewContentDetail/competenc ySections/competencies/officialRating/rating,formHeader/isRated,formContentId,formDa taId,status,formHeader/formTemplateId,pmReviewContentDetail/competencySections/co mpetencies/assignments,pmReviewContentDetail/competencySections/competencies/s ource,pmReviewContentDetail/competencySections/competencies/itemIndex, formHeader/formDataStatus, lastModifiedDate&$filter=status eq '10' and formHeader/formDataStatus eq '3'&$format=json&$expand=pmReviewContentDetail/competencySections/competencies ,pmReviewContentDetail/competencySections/competencies/officialRating,formHeader/f ormSubject,formHeader&$orderby=lastModifiedDate desc

This API call will capture the competencies of an employee. The filter for template ID of the performance review form must be included **formHeader/formTemplateId** and must be equal to the formTemplateId from FormTemplate (6.10) information that will be selected by the user.