Configuring the Position Object Objective

After completing this lesson, you will be able to configure Position object fields and customize the UI layout of the Position object. Position Object SAP SuccessFactors position details form showing editable fields for type, code, title, status, start date, job level, and FTE. The Position object is an effective dated entity which has organization, job, and pay related fields. Each position is linked with a parent position and incumbent of parent position becomes the direct manager.

Being an MDF Object, the definition is maintained in Configure Object Definitions tool. Here you can make configuration decisions such as:

Displaying or hiding fields Renaming standard labels Adding translation labels Adding custom fields\* Setting default field values Configuring searchable fields Setting up security Setting up associations Assigning a Default Screen UI Assigning workflows and other business rules. Note

1. Currently, the limits on custom fields available for the Position object, are: 30 custom String fields 55 custom Number fields (mapped to Number, Boolean, Picklist, Translatable, Generic Object, Foundation Object...) 20 custom Decimal fields 15 custom Date fields (mapped to Date, DateTime, Time) These limits are specific to Position object. There are different limits generally speaking, for Standard MDF Objects and Custom MDF Objects.

You will get a warning message when 80% of the limit is reached and an error message when the limit for the custom fields is exceeded, before the Object definition is saved.

For more information including the MDF Data Type Mapping, you can check: Custom Field Limits on Pre-delivered and Custom MDF Generic Objects

Object Details When navigating to Configure Object Definitions, use the Search drop-downs to find the Object Definition → Position . Here you can choose Take Action → Make Correction.

At the top of the object definition is the object details section. This section determines the overall behavior of the object, such as the Status, Effective Dating and others. Some of the main details are :

Position Object main details Detail Description Current value Code This is the unique identifier of the Generic Object in the system Position Effective Dating Determines whether the Generic Object is effective dated Basic Status Status of the object (Active/Inactive) Active MDF Version History The MDF Version History allows you to capture the MDF audit information about added, updated, and deleted field values and records No Default Screen You can assign a default configurable UI to an MDF object N/A Label Name of the object that appears on the UI. If no label is provided, the Code will be used. N/A Workflow Routing You can add workflow routing to the object by associating it with a workflow. Alternatively, a workflow rule can be linked in the rules section. Note

It is not recommended to assign a workflow at the object level. Instead, use business rules to trigger workflows, if needed, for Position creation, position changes, etc. N/A Pending Data If you’ve linked a workflow to an object that involves an approval, and you want the data changes to take effect only if approved. In Position object, this is a requirement if workflows are to be triggered. No. This value should be set to Yes in the Position object definition. Todo Category This field is read-only. For all custom MDF objects, Generic Objects Change Requests is the default category. For predelivered MDF objects, the value is set by the respective business areas Generic Object Change Requests Note

Some of these current values will be changed in the exercise for Position Object set up, within this unit. Fields This section allows you to manage the object fields and the field attributes. On the position object, there are standard fields, business-relevant fields, position management fields, MDF system fields, and you can also create custom fields. Some labels/attributes might look slightly different in your system, however this will go over relevant information for the default set up:

Standard Fields - some standard fields of the object include basic fields used across the Metadata Framework, such as a Code, External Name, Status, Start Date, etc. Business-Relevant Fields - some fields on the position object are connected to data coming from the organizational structure. These fields can be used to share data to employees assigned to positions. Some examples include Business Unit, Legal Entity (Company), Department, Job Classification (Job Code), FTE, Standard Hours, Employee Class, etc. Position Management Fields - some fields have defined behaviors in the context of Position Management. Depending on the features used, these attributes may be mandatory. Some examples include Criticality, Position Controlled, Position Type, Target Capacity, Multiple Incumbents Allowed, To-Be Hired, Parent Position, and Right to Return. Some of these fields are only relevant for Succession Management. MDF System Fields - some fields are technical fields and should NOT be modified or set to visible. These include internalId, and fields that start with "mdfSystem…", etc. Custom Fields - you can add and set up custom fields for the position object to meet any customer needs. Some specific fields will be described in this lesson. For more information on fields, please refer to the Fields in Position Object.

Business Relevant Fields SAP SuccessFactors position details form and mapping table showing job fields, data types, and corresponding job information fields for configuration. Fields that are job related are shared between objects like the Position Object, Job Classification object and the Job Information Object. These can be synchronized for data entry efficiency, since the data on these fields is common data and connected in the system. The business-relevant fields are standard fields that can be used in a synchronization between position and employee.

Job Code SAP SuccessFactors position form for Director of Marketing showing dropdown selection for job code, position type, status, and employee class. The Job Code field in a Position is intended to assign the corresponding Job Classification. The job-related fields in the Job Classification can be filled automatically in the position details, when selecting a value for the Job Code field.

SAP SuccessFactors job classification and position details for Director, Marketing, showing job code, title, level, pay grade, and employee class. Some of the default set of common fields in both the Job Classification and the Position include:

Job Title Job Level Regular Temporary Employee Class Pay Grade Note

This data propagation from Job Classification to Position must be set up using a Business Rule. You must define the rule and assign the rule to the jobCode field in the Position object. You will learn how to set up the rule in the Unit 4 of this course. Full Time Equivalent SAP SuccessFactors position details for Sales Director, NC, showing job information, classification, pay grade, and organizational chart with FTE status. The Target FTE (or planned FTE) expresses the amount of the workload of an employed person. When an employee is assigned a position with a planned FTE, the current FTE of the employee will determine if the position is fully staffed or understaffed.

An example is a Position with FTE=1. If an employee works 40h/week and that should be equivalent to a full-time employment, then the employee will have a current FTE=1 and the position will be fully staffed.

However, if the employee changes the schedule and now the hours worked are 25h/week, then the current FTE of the employee would be 0,625, which means that the position would be understaffed (current FTE < planned FTE).

SAP SuccessFactors position card for Sales Director, SE, showing grade, location San Francisco, status regular, and 0 of 1 FTE. When positions do not have an incumbent, like the image above (shows 0 / 1 FTE), or whenever the position with an incumbent assigned has a current FTE < planned FTE), a TBH (To Be Hired) icon will display to indicate it (To Be Hired=Yes). The position can be marked as not vacant, in which case although the FTE shows the position is understaffed, there is no TBH icon (To Be Hired=No).

SAP SuccessFactors Engineer position details for San Mateo, showing job code, pay grade, incumbents, FTE status, and assignment duration. In some cases, a position may be overstaffed, which indicates the current FTE value is higher than the planned FTE for that position. The example above shows 3/2 FTE (3 incumbents assigned full-time to the position, but the planned FTE is 2 incumbents assigned full-time).

Note

The To-Be-Hired (TBH) adaptation is one of key Follow-Up processes in Position Management that will update the TBH status based on position assignments/unassignments, or whenever the employee's FTE who is assigned to a position is changed. There are different available options to control the ‘To Be Hired’ Status Adaptation behavior in Position Management Settings that you will learn in this course. Setting up Automatic Update Of "To Be Hired" Field

It is also possible to configure the system to prevent the position from being overstaffed (Current FTE > Target FTE), enabling the Position Controlled field, and set the value to True in a Position record. The Position Controlled field will check the Target FTE when an employee is being assigned to the position and would prevent any overstaffing. Position Control

The Transition Period is another setting related to the FTE. If there is a need for temporary overstaffing (Current FTE > Target FTE), such as an employee being hired to a position while the employee leaving is still assigned (for a handover of tasks, etc), this transition period can be assigned in Position Management Settings globally for all positions, or you can use Position Types if only a group of positions should have this option. Transition Periods

Standard Hours This is the standard field for the standard hours on job information and position and can be included in the synchronization between position and employee. In this case, the employee's FTE value will be calculated based on the standard hours inherited from the employee's assigned position.

A business rule to Calculate FTE, assigned at the standard-hours field (in Job Information) would check the value of standard hours field from most to least specific value. Starting from the Standard Hours field in the Employee's Job Information. In case the value is null, the rule would be looking elsewhere to find the Standard Hours value and propagate it into the Job Information of the employee. Ultimately, the FTE would be calculated based on the Standard Hours.

SAP SuccessFactors rule configuration screen for calculating Full-Time Equivalent (FTE), showing scenario, parameters, variables, conditions, and calculation options. The order that the business rule to calculate FTE will follow is: Job Information, Position, Job Classification, Location and Legal Entity.

SAP SuccessFactors FTE calculation shows standard weekly hours, job details, and conversion to FTE value based on hours entered. Parent Position SAP SuccessFactors position details for Sales Director, SW, showing job information, parent position, reporting structure, and organizational chart with FTE. The parent position is the higher-level position in the Position Hierarchy. When an employee is assigned a position in Job Information, this can be used to automatically replace the employee’s supervisor with the incumbent of the Parent Position.

When positions are created from Position Org Chart based on a source position (Create Same-Level Position / Add Lower Level Position), the Parent Position value is defaulted based on the position hierarchy and non-editable during position creation. For Copy Position, the position field values including the Parent Position would be copied over the new position(s) to be identical.

The Parent Position is technically a one-to-one association type in the Position Object definition.

Incumbent SAP SuccessFactors position details for Sales Director, NE, showing job information, incumbent Marcus Hoff, staffing status, assignment date, and organizational chart. The incumbent field is designed to display a user in the system who is currently occupying the position.

Note

This field is only relevant for Succession Management and how you set the visibility will depend on the following:

If Position Management and Succession Planning are being used : Set the visibility to Not Visible If only Position Management is used : Set the visibility to Not Visible If only Succession Planning is used: Set the visibility to Editable The reason behind it is that in Employee Central Position Management, the assignment between a position and the incumbent is made using the position field on Job Information, so there is no requirement to maintain this field.

The Configure Object Definition tool will trigger an error message when saving changes in the Position object, if the incumbent field visibility is set to Editable or Read-Only and Employee Central Position Management is enabled.

SAP error message indicating incumbent field visibility must be set to Not Visible when Position Management functionality is active. OK button. Position Control SAP SuccessFactors Manage Positions screen showing search filters, position control dropdown, editable fields for ID, name, status, and start date. Position Control (field: positionControlled ) is an attribute on the Position object that controls whether the target FTE is checked when an employee is assigned to this position. In addition, the attribute triggers the stable headcount processing when an employee is assigned to a new position during Position Transfer or Position Reclassification.

If a position is subject to position control, the full-time equivalent (FTE) values of all incumbents assigned to the position must not be higher than the FTE value assigned to the position.

This is checked when:

A new employee is hired. The manager assigns a new position to an employee or changes the FTE of an employee on the Update Employee Records screen. The position or FTE value is changed in the History. The FTE value of the assigned position is changed. The system searches for a suitable position when a position transfer or position reclassification is required. If a position is subject to position control, the system checks for each imported job information record, whether the FTE values of an incumbent assigned to the position must not be higher than the FTE value defined for the position. This can be very time consuming, especially if there are multiple incumbents assigned to a position, as we know this for "cumulative positions" with multiple records. Please consider this impact in time when performing a job information import. SAP SuccessFactors recommends that you set the position control to No in such cases.

Other relevant fields Some other fields in the Position Object are :

Other relevant Position fields Code Label Description Recommended? vacant To Be Hired Indicates whether anyone will be hired for this position. If set to True, it is shown on the Position Org Chart as To Be Hired position. Some parameters in Position Management Settings can be used to set TBH status when an incumbent is assigned/unassigned from Position or based on FTE value changes. Yes multipleIncumbentsAllowed Mass Position This attribute controls whether the system allows the assignment of more than one employee to this position at any point in time. Enabled but set to No as default. type Position Type You can use position types to modify standard system behavior for one or more positions for actions like workflows for position changes, reassignment of direct reports when a manager leaves a position or how to manage transition periods, reporting line or job relationships adaptation. No, unless there is a particular business need to use Position Types in the organization. Position Types would add more complexity to the organization. Note

There are other fields, relevant for Succession Management, that will be discussed in Unit 5 - Integrating SAP SuccessFactors Employee Central Position Management with other SAP SuccessFactors solutions Define Field Labels and Visibility You can define field labels, visibility, set default values, and add custom fields to your object as needed.

Steps Log in to the instance.

Navigate to the Configure Object Definitions tool.

Search for the Object Definition → Position.

Select Take Action → Make Correction..

Find a field that you would like to modify.

Select the Details. Here you can define the field labels if you don’t want to use the default labels, define the visibility, if the field if mandatory or not, or add a default value.

Under Details, you can maintain the uiFieldRenderer field to hide external codes for Generic Objects and Picklist fields, like Department, Job Code or Job Level, to display only the label. Use displayGOWithoutExternalCode for Generic Objects, and displayPickListWithoutExternalCode for Picklists

To add a custom field, scroll to the bottom of the fields section. Identify an empty row to add a field that has the name "cust\_".

Add your custom field. Select the Details to modify the set up of the field be selecting a data type, adding the max length, visibility, required, and a label

Click Save on the object.

Object Associations As you learned in the SAP SuccessFactors Employee Central Core Academy course, Foundation Objects and Generic Objects can be associated using Associations. These associations define a hierarchical relationship between objects and therefore will determine, as an example, that a newly created Department belongs to a specific Division, or a Location is associated to several Legal Entities within the same country.

Ultimately, an association can be utilized for filtering results based on the parent field in the Employee File using field criteria that is set up in the Succession Data Model / Manage Business Configuration. Which means that, based on the Division (parent field) assigned to the employee when hiring or making changes from MSS UI or History, the available Departments (child or lower field) will be filtered to display only those associated to that Division. This would help in the data entry to ensure only the correct associated objects can be selected in the Employee File.

Custom Associations can be created according to your customer's needs.

Note

To refresh or expand the Associations topic you can review these resources in the SAP Help Portal: Associations, which covers the associations between Foundation Objects in Employee Central. The guide Implementing the Metadata Framework (MDF) has also references to associations between generic objects: Associations in MDF

Associations in Position Object Position object is not an exception and there are some standard associations that you will find in the Object Definition. The following table summarizes the available associations found in Position :

Position Object Associations Name Multiplicity Destination Object Type Visibility positionMatrixRelationship One To Many Matrix Relationship For Position Composite Not Visible parentPosition One To One Position Valid When Editable The most important association is the one from Position to Parent Position. This is a one-to-one association where you will essentially associate every position with its Parent Position to establish the position hierarchical level. Parent Position will also play an important role when creating Lower Level or Peer positions from the Position Org Chart since the value will be auto-populated depending on the hierarchical level between the Source and Target Position.

The Position to Matrix Relationship For Position relationship can be set to Editable to maintain Matrix Relationships for positions, synchronize between Matrix Relationships and Job Relationships when assigning employees to positions and restrictions, if needed, to apply in Role-Based Permissions to determine access to view or create positions based on this relationship.

Note

For more information about Matrix Relationships, you can check the following section in the guide Implementing Position Management , available in the SAP Help Portal: Matrix Relationships Object Security MDF Objects can be set to Secured or Non-Secured within Configure Object Definitions → Security. The Position object is set to be Secured, and therefore, access is controlled from role-based permissions, under Miscellaneous Permissions category.

You can verify the Position Generic Object security by following these steps:

Go to the Admin Center and choose Configure Object Definitions. Search for Position and select Take Action → Make Correction. In the generic object definition, scroll down to the Security section. Verify that Secured is set to Yes , and Permission Category is set to Miscellaneous Permissions and save your changes. Go back to the Admin Center and choose Manage Permission Roles. Select the role name, such as System Admin, whose permissions you want to manage. Choose Edit, and on the Edit System Admin page, navigate to the step 2. Add Permissions. On the 2. Add Permissions screen, scroll down to Miscellaneous Permissions and specify which permissions users with this role should have. For example, you can define whether users should be able to view positions and also which actions they are allowed to perform for a position. In addition, you can define field level overrides for the position to ensure, for example, that users can’t access a particular position field. Choose Next to continue to step 3. Preview, and then, select Save to save all your changes. To further restrict which positions employees with the permission roles that you just maintained are allowed to view, create, insert, correct, or delete, you can define a Target Criteria on the Position object. Navigate back to Manage Permission Roles page, and select the role to edit. On the next step, select the Assignments tab, and on the Actions column, choose Edit. Navigate to step 4. Define Target Criteria, and locate Position, under Miscellaneous Permissions. By default, All is selected, which means that the permissions you granted for this role are valid for all positions in the system. Select the radio button for Restrict Target Criteria to: You can restrict the target population based on different options:

You can grant user access to every position, or to a specific target group of positions. You can also restrict access to positions lower in the hierarchy than the granted user’s position. If you are using Matrix Relationships on the Position object, you can also restrict access to positions based on the Matrix Relationships. Exercise - Set up Position Object Your customer wants to implement several changes in the Position object definition such as, changing labels for some of the standard fields, adding custom fields, set up the association with Position Matrix Relationships and change the visibility for several fields.

Whenever possible, the customer does not want to see the external codes, only the labels (except for the Job Code), so you will need to work on these changes for Generic Objects and Picklists. As a last step, the customer also wants to confirm the Position object is secured and access can be controlled at a more granular level through permissions in Role-Based Permission framework.

Note

In a previous exercise, you already specified the target population for Position object to restrict access to certain actions for Managers and Employees. In this exercise, you will verify these restrictions will also apply when creating positions. In the Position Standard Fields table, review the column UI Field Renderer and add the following values in Details → UI Field Renderer for those fields that are set to Yes, depending on the type of field.

For fields of type Picklist:displayPickListWithoutExternalCode. For fields of type Generic Object:displayGOWithoutExternalCode. Exercise Start Exercise Exercise Start Exercise Steps Make the following modifications to the Position Object. using the Object Details and Position Standard Fields tables below. Look for the highlighted values to be modified:

Object Details. New value. Pending Data Yes. Position Standard Fields Name Data Type Label Visibility Required UI Field Renderer multipleIncumbentsAllowed Boolean Mass Position Editable No positionControlled Boolean Position Controlled Editable No standardHours Decimal Standard Weekly Hours Editable No code String Position Code Editable Yes externalName Translatable Position Title Editable Yes positionTitle String Not Visible No criticality Number Not Visible No comment String Not Visible No incumbent User Incumbent Not Visible No changeReason Picklist Change Reason Not Visible No N/A description String Description Not Visible No jobCode Generic Object Job Code Editable Yes No jobLevel Picklist Job Level Editable No Yes employeeClass Picklist Employee Class Editable No Yes regularTemporary Picklist Regular/Temporary Editable No Yes targetFTE Decimal FTE Editable Not required. Hint

Set the default value to 1 for this field.

vacant Boolean To Be Hired Editable Not required. Hint

As an optional step, you can set default value to true in the details, so all positions are vacant when being created.

company Generic Object Company Editable No Yes businessUnit Generic Object Business Unit Editable No Yes division Generic Object Division Editable No Yes department Generic Object Department Editable No Yes costCenter Generic Object Cost Center Editable No Yes Navigate to Configure Object Definitions using Action Search.

In the Configure Object Definitions page, select Object Definition in the Search drop down, then type Position to search for the Position object, and select it.

Once the Position object displays, choose Take Action → Make Correction on the right side.

In the Object Definition details, make the changes highlighted in the Position Object details table.

Scroll down to the Fields section, locate the fields given in the Position Standard Fields table and the make the required changes.

Hint

Choose Details button next to each field, to view more information of the field.

Click Save to save all changes.

Note

When saving at this step, you will see a warning message that refers to the positionTitle field being searchable and set to 'Not Visible'. Select Yes to continue and save the object definition. You will remove this field as a searchable field in step 5, and use the default searchable fields externalCode and externalName and some additional fields to search for positions. Create a new picklist for the Position's Incentive Plan custom field you will be adding into the Position object definition.

Navigate to Picklist Center using Action Search.

Select + to create a new picklist, with the following details:

Code : IncPlan Name: Incentive Plan Status: Active Effective Start Date: Jan 1, 1900 Display Order: Alphabetical Select Save.

In the Picklist Values section, select + to add these 4 values. Select Save after adding each.

External Code : MGR Name : Manager External Code: SMGR Name : Senior Manager External Code: IND Name: Individual External Code: EXEC Name: Executive Add two new custom fields, Incentive Plan and Onsite/Remote, to the Position object definition, using the Position Custom Fields table. For these new fields, your customer does not want to see the external codes of the picklist values, so make sure to use displayPickListWithoutExternalCode in the UI Field Renderer.

Position Custom Fields Name Max Length Data Type Valid Values Source Required Visibility Label cust\_IncPlan 38 Picklist IncPlan No Editable Incentive Plan cust\_onsiteRemote 38 Picklist onsiteRemote No Editable Onsite / Remote Navigate back to Configure Object Definitions using Action Search.

In the Configure Object Definitions page, select Object Definition in the Search drop down, then type Position to search for the Position object, and select it.

Once the Position object displays, choose Take Action → Make Correction on the right side.

Create the new custom fields given in the Position Custom Fields table above. Notice that cust\_ will appear automatically in the name when adding new fields.

Scroll down and choose Save.

Enable the Position to Matrix Relationship For Position association.

Navigate to Take Action → Make Correction to continue editing the Position object.

Scroll down to the Associations section, and locate the positionMatrixRelationship association name.

Do not change any of the existing options (Name, Multiplicity, Destination Object, Type) for this association and select the Details option.

Make the following changes:

Visibility: Editable. Label: Matrix Position. Select Done.

Scroll down and Save.

Make modifications in the Searchable Fields in the Position Object, to use the newly created custom fields and remove the existing field in the section.

Navigate to Take Action → Make Correction to continue editing the Position object.

Scroll down to the Searchable Fields section, and complete the following changes:

Remove positionTitle as a searchable field using the bin icon. Add cust\_IncPlan picklist as a searchable field. You will need to type cust\_IncPlan.label Add cust\_onsiteRemote picklist as a searchable field. You will need to type cust\_onsiteRemote.label . Scroll down and choose Save to save changes.

Verify the Position Object is secured and make additional changes on the Security.

Security Field Value Secured Yes Permission Category Miscellaneous Permissions CREATE Respects Target Criteria Yes Navigate to Take Action → Make Correction to continue editing the Position object.

Scroll down to the Security section.

Verify the information is as shown in the Security table and set the value for CREATE Respects Target Criteria. to Yes.

Click Save to save changes in the object definition.

Verify you can see all the changes when creating a new position.

Navigate to Manage Positions using Action Search.

Select Create New → Position and confirm all your changes. When done, click Cancel.

Verify that Managers can only create positions below their hierarchy as defined in the previous exercise Set Up Role-Based Permissions for Position Management.

Proxy as Marcus Hoff to access the instance as a manager.

Navigate to the Position Org Chart from Home → Company Info.

Click on the Add Position icon found on the Position Org Chart toolbar.

In the Job Code field, select Director, Operations (OPS-DIR)

In the Parent Position field, select VP, Operations (POS-VPOPS)

Complete any other required field to your choice.

When finished, click Save. Verify an Error pop up dialog will prevent from creating the position, due to No Permission. The reason is that the Parent Position selected is not in your target population.

Click OK. Cancel and do not save the changes.

Configurable UI for MDF Objects You learnt how to make changes on the fields and attributes for the Position object, using the tool Configure Object Definition. Additionally, MDF Objects (Generic Objects) including Position object, can have a more user-friendly layout that can be configured in the tool Manage Configuration UI.

The Manage Configuration UI tool is part of the Metadata Framework options and access is granted from Manage Permission Roles → Administrator Permissions → Metadata Framework.

This tool is mainly used for any of these objectives :

Create an MDF Screen UI to use as Default Screen for the Object Definition, allowing for a more user-friendly layout when creating object records (Generally in Manage Data or Manage Positions in case of Position records.) Create an MDF Screen UI to display an Object in Custom MDF Block in Employee File. Some of the capabilities of Manage Configuration UI are:

Change label for fields. Add new fields. Change the display sequence of fields. Change the layout of UI. Change visibility of fields. Set fields to required. Add Rules Delete a field from UI. Add a link. Add a group. Note

This list is not an exhaustive list of capabilities for Manage Configuration UI tool. To find out more, check the following link: Manage Configuration UI Exercise - Create a Configurable UI for Position object Your customer has noticed that the Position Object definition is disorganized. They would like to rearrange fields, and group some of the fields in different sections for a more user friendly layout. In the following exercise, you will create a Configurable UI for Position Object to fulfill their requirement.

Note

You should exercise caution and not delete any field while creating the Configurable UI. The tool does not have a revert back option and you would need to start over if accidentally deleting a field. The best option is to organize all the fields first, and once all the changes have been saved, you can delete any field that is not needed. You will notice that the tool creates an Input field every time a new group is added, since it is a requirement to have at least one field per group. Once you have completed the steps and rearrange the position fields to every group, you can remove these Input fields

Exercise Start Exercise Prerequisites Administrator should have permissions to access Manage Configuration UI tool.

Steps Verify that currently, Position records have the same layout as the image Position Object Details.

SAP SuccessFactors position details for Sales Director, NE, showing job code, title, status, pay grade, FTE, company, and department. Navigate to Manage Positions using Action Search.

Search Position and locate Sales Director, NE (DIR\_SALESNE) from the existing positions.

Verify the layout displays as the image Position Details.

Create a new Configurable UI Screen using the example from the images.Position Configurable UI Fields (rearranging fields as a first step) and Position Configurable UI Screen (the final results applying some UI layout changes).

SAP SuccessFactors position form displaying editable fields for job details, status, FTE, department, cost center, and matrix position configuration. SAP SuccessFactors position configuration form with editable fields for job, classification, matrix position, organization, cost center, and employment attributes. Navigate to Manage Configuration UI using Action Search.

Click on Create New to create a new UI. Set the Id as PositionUI and Select Base Object, select Position.

As a first step, rearrange the fields following the order from the Position Configurable UI Fields image.

Click Save to make sure these changes are saved before continue to the next step.

In the Position blue toolbar, select Add Group to create a new group. The new group will be added at the end of the screen with a default Title and a field Input.

Hover over the new group to view the option Edit Properties. Click into this option.

In the Title Type User Defined, change the Title to Job Classification Details.

Expand the Title Style section and select the checkbox for Bold to display the title in bold.

Scroll up and change the Layout to Flow.

Click OK to confirm changes.

Drag and drop the required fields that should be included in this section: Job Title, Job Level, Employee Class, Regular/Temporary and Pay Grade.

Delete the Input field that was created when you added the new group.

When done, click Save to ensure everything is saved as of this step.

Repeat steps e and f to create another group and edit its properties. Remember that you must click Add Group from the option at the top of the page.

In the Title Type User Defined, change the Title to Organizational Details.

Expand the Title Style section and select the checkbox for Bold to display the title in bold.

Click OK to confirm changes.

Drag and drop the required fields that should be included in this section: Company, Business Unit, Division, Department, Location and Cost Center.

Delete the Input field that was created when you added the new group.

When done, click Save to Save Changes.

Make additional changes on the Matrix Position association visible in the Position object.

Locate the Matrix Position association, which includes the fields Type and Related Position.

Change the Title to Matrix Position Details.

Select the edit option in the Related Position field.

Locate the Label Override and type Matrix Position. Select OK.

Select Save to save all changes.

Assign the new UI Screen to the Position Object

Navigate to Configure Object Definitions using Action Search.

Search Object Definition and locate Position on the drop down list.

Select Take Action → Make Correction to make changes in the Position object.

In the Default Screen field, select the PositionUI you created previously.

Save changes.

Verify changes navigating to Manage Positions and search for an existing position (Sales Director, NE (DIR\_SALESNE))

Navigate to Manage Positions using Action Search.

Search Position and locate Sales Director, NE (DIR\_SALESNE) from the existing positions.

Verify the layout now has changed and fields are displayed following the Configurable UI you created. You can check the Position Configurable UI Screen.

The Configuration UI is now completed

Summary The position MDF object is managed on the Configure Object Definitions tool, where the field details, attributes, associations, and business rule assignments are configured. Some of the key fields in the Position object are the Job Classification, Full Time Equivalent, or To Be Hired, as well as the different organizational data fields, such as Legal Entity, Division or Department. The association with Parent Position allows to assign a higher level position and derive the incumbent of the position as the manager or supervisor. With the Configuration UI tool, the display and layout for Position records can be customized and be more user-friendly.

Perfect 👌 You pasted one of the most **important and dense** sections: **Configuring Position Management Settings**. Since you’re starting fresh and want an **exam-ready + trainer-discussion-ready explanation**, I’ll go step by step, breaking down each concept **in very simple words** first, then showing the **system behavior**, and finally giving you a **summary** you can revise quickly later.

## 🏗 What is Position Management?

Think of **positions** as “seats” in an organization.

1. An employee (incumbent) sits in that seat.
2. When they leave, the seat remains, ready for another person.
3. Position Management lets HR control how these seats behave (vacancy, reporting line, synchronization, etc.).

**The tool we configure for this is:** Position Management Settings**.** This tool decides:

1. How positions are created, updated, or deleted
2. How they interact with employees (job info sync)
3. How hierarchies (reporting structures) are maintained
4. What happens during transitions (when one leaves and another joins)

## 🔑 Tabs in Position Management Settings

The settings are divided into multiple **tabs**. Let’s understand each clearly.

### 1. ****General Tab****

Controls **basic behaviors** of positions.

1. **Position Types** → Group positions by type (e.g., Regular, Shared). Used if you want different workflows/rules for different types of positions. 👉 Example: Shared positions might allow multiple employees, regular positions only one.
2. **Position External Code Generation** → How are Position IDs created?
3. Auto-generate (system creates code using a rule).
4. Manual (admin types the code).
5. **To Be Hired (TBH) Status Adaptation** → TBH = vacancy. System can auto-update vacancy when:
6. An employee joins/leaves a position
7. FTE (Full Time Equivalent) changes

👉 Example: If one person leaves, position becomes “To Be Hired” automatically.

### 2. ****Hierarchy Adaptation Tab****

Controls **who reports to whom**.

1. **Leading Hierarchy** → What structure should system follow?
2. **Position Hierarchy (Recommended)** → based on seats. If you move a seat, reporting line updates.
3. **Reporting Hierarchy** → based on people (direct manager links).
4. **None** → no auto-updates.
5. **Reassign Direct Reports** → On termination/internal hire, should system reassign subordinates?
6. Yes Always (best practice).
7. **Default Manager on Hire UI** → When assigning a position during hire, system auto-fills manager from hierarchy. Saves manual effort.
8. **Threshold for Running as Job** → If too many incumbents (like > 5), updates run as a background job instead of instantly.
9. **Automated Daily Hierarchy Adaptation** → A daily job runs to ensure reporting lines match position hierarchy (fixes mismatches automatically).

### 3. ****Synchronization Tab****

Keeps **employee Job Info** and **position data** aligned.

1. **Position → Job Info Synchronization**
2. Automatic (best) → sync in background
3. User Decision → asks admin each time
4. Never → no sync
5. **Job Info → Position Synchronization** → sync happens the other way when employee job info changes.
6. **Automated Job + Offset in Days** → Schedule jobs to keep future-dated records in sync.
7. **Search for Position before creating new one** → Instead of creating duplicates, system first checks if a vacant position already exists.

### 4. ****Matrix Synchronization Tab****

For **Matrix Relationships** (dotted-line reporting). Example: An employee reports directly to a manager but also has a dotted-line manager (like project manager).

1. Synchronize position matrix relationships to job relationships → Always recommended.
2. Handle vacant matrix positions (e.g., if project manager leaves, assign next manager up).
3. Automated job can sync matrix relationships to job info automatically.

### 5. ****UI Customizing Tab****

Controls how position fields and options appear in **screens**.

1. Copy Position Fields → Default values when copying positions.
2. Show only “To Be Hired” positions when assigning employees (prevents double assignment).
3. Show/Hide “Deactivate Position” option on termination.

### 6. ****Transition Period Tab****

When a **successor is assigned before the incumbent leaves** → position temporarily has multiple employees.

1. Define period (days/months) allowed for overlap.
2. Must be used carefully (otherwise system thinks positions are overstaffed).

### 7. ****Other Tabs****

1. **Right to Return** → For leave/assignment scenarios. Lets employee return to their old position.
2. **Integration** → Sync with Recruiting (job requisition auto-created when position opens).
3. **Import** → Control behavior during data import.

### 8. ****Check Tool****

A diagnostic tool to verify settings are correct. Examples:

1. Are all mandatory fields filled?
2. Is position sync rule correctly defined?
3. Is code generation rule properly configured?

## 📌 Summary (Exam/Trainer Quick Notes)

1. **Position Management Settings** = main tool to control position behavior.
2. **General Tab** → Position types, code generation, vacancy (TBH) rules.
3. **Hierarchy Adaptation Tab** → Defines reporting structure (Position Hierarchy best practice).
4. **Synchronization Tab** → Keeps employee job info & positions aligned (Automatic recommended).
5. **Matrix Sync Tab** → Handles dotted-line relationships.
6. **UI Customizing Tab** → Controls how positions show up in screens.
7. **Transition Period** → Allows overlap of old + new incumbent.
8. **Other Tabs** → Integration with recruiting, right to return, imports.
9. **Check Tool** → Verifies configuration is valid.

👉 This is the **full breakdown**. You can save this and revise quickly before exams.

Do you want me to now create **10 smart trainer-level questions just from this Position Management Settings topic** (so you can ask and look like you studied)?

Perfect 👍 You pasted the full section on **Creating and Maintaining Position Records** in SAP SuccessFactors. Since you said you want **easy but detailed explanations you can save and revise for exams**, I’ll explain each concept clearly step by step. At the end, I’ll give you a **summary with key points** so you can revise quickly.

## 1. What is a Position Record?

1. A **position** = a specific "seat" in the company’s organizational structure. Example: Sales Director (North East) is a position. Whoever occupies it (Harry Wilson or someone else) is the **incumbent**.
2. Positions are stored as **records** in the system, and they are **effective-dated** (changes can be recorded for past, present, or future dates).

## 2. Position Management Administration

1. Managing positions in **Employee Central** is similar to other objects but uses a special tool called **Manage Positions**.
2. **Why special tool?** Because:
3. It gives administrators control over positions **without touching all other data**.
4. It separates permissions:
5. Manage Positions → permission to handle positions only.
6. Manage Data → permission to handle all objects (too broad, not always recommended).
7. So, with **role-based permissions**, admins can assign very specific rights like:
8. Manage Positions (positions only).
9. Manage Sequence / Manage Mass Changes (specific to objects).

## 3. Ways to Create New Positions

You can create a position in multiple ways:

1. **Manage Positions** – Most common tool to create/edit positions.
2. **Manage Data** – Possible, but **not recommended** (too generic).
3. **Position Org Chart** – Add directly from the org chart:
4. Create a new position under an existing one.
5. Create same-level or lower-level positions.
6. Copy attributes (like job code, department, etc.) automatically using business rules.
7. **Copy Position** – Copy up to 100 positions at once from an existing position.
8. Position Code auto-generates.
9. Can mark them as To Be Hired (vacant).
10. Needs special permission: **Mass Copy of Position**.
11. **Import & Export Data** – Use CSV to mass-create positions.
12. **My Team Positions** – For **managers**:
13. They can create positions within their team.
14. Options:
15. Copy only certain fields (via business rule).
16. Copy all fields.
17. **Joule (AI Copilot)** – New AI assistant that lets you create positions from chat interface.

## 4. Exercise Example (Creating a New Position)

Example: Creating **Director of Marketing (DIR\_MKT)** under **VP Sales**.

1. Fill fields like: Position Code, Job Code, Status, Start Date, Location, Pay Grade, etc.
2. Mark To Be Hired = Yes (means the position is vacant and needs someone).
3. Save it → Position shows in **Position Org Chart**.
4. Next: Create a **Matrix Relationship**:
5. Director of Marketing becomes a **Matrix Manager** for Procurement Manager.
6. Even though position is vacant, the relationship is still stored.

## 5. Maintaining Existing Position Records

You can update existing positions using:

1. **Manage Positions tool** → actions available:
2. Make Correction (fix existing record).
3. Permanently Delete Entry (delete one record or whole position).
4. Add to Transport Bundle (move config/data to another instance using Configuration Transport Center).
5. Insert New Record (create a new effective-dated record without losing history).
6. **Position Org Chart** →
7. Open position card → Show Details → Edit or Manage.
8. Change hierarchy (example: move Account Manager under a new Sales Director).

## 6. Example (Maintaining Position)

1. Example: Account Manager NE (Harry Wilson) was reporting to Sales Director NE (Marcus Hoff).
2. You change the **Parent Position** to Sales Director NC (Richard Maxx).
3. After saving, system updates:
4. Position Org Chart.
5. Job Information of Harry Wilson (supervisor changes automatically).
6. Event Reason automatically set as **Supervisor Change Only**.

## 7. Synchronize Position Changes to Incumbents

1. When you edit a position, you may want the change to reflect in the employee’s record. Example: If you move position’s **Cost Center** to Marketing, the employee should also move.
2. This is handled by **Position to Job Information Synchronization** (via **business rules**).
3. Admins define:
4. Which fields sync (cost center, department, pay grade, etc.).
5. Whether sync happens automatically or with user confirmation.
6. **Important**: Sync only works when editing via **Position Org Chart or Manage Positions**.
7. If you edit via **Manage Data**, sync does **not** happen.

## ✅ Summary (Easy Revision Points)

1. **Position Record** = a "seat" in the org (effective-dated, with incumbents).
2. **Manage Positions tool** = main tool to create/edit positions (separate permission from Manage Data).
3. **Ways to Create Positions**:
4. Manage Positions, Position Org Chart, Copy Position, Import/Export, My Team Positions, Joule AI.
5. Manage Data possible but not recommended.
6. **Copy Position** = up to 100 positions, auto-code, mark as To Be Hired. Needs **Mass Copy** permission.
7. **Matrix Relationship** = link between positions (e.g., matrix manager).
8. **Maintaining positions** = insert new record (effective-dated), make corrections, delete, or transport configs.
9. **Position Org Chart** = shows hierarchy, allows edits, shows parent/child positions.
10. **Synchronization** = updates employee job info when position changes (via business rules).
11. Works only via Position Org Chart or Manage Positions.

👉 Bro, do you want me to now prepare a **set of 8–10 practice Q&A** from this topic (like exam-style and trainer-style)? That way you can test yourself before moving to the next chapter.

Nice work pasting this in 👍 This section is about **Maintaining Position Data through Mass Changes** in SAP SuccessFactors. I’ll break it down into **clear, exam-friendly explanations** → then give you a **summary with the most important points** for revision.

# 1. Importing Positions

1. **Position = MDF object** → can be imported/exported using **Import and Export Data tool**.
2. **Steps for Importing**:
3. Download template for Position object.
4. Fill details in CSV.
5. Import CSV via Import Data action.
6. Validate first (system checks errors).
7. Confirm in **Scheduled Job Manager**.
8. **Include Dependencies: Yes** → download will also include related entities like Position Type, Legal Entity, Division, etc.
9. **Triggering Sync**: If you want **Position → Job Information synchronization** during import →
10. Add column **technicalParameters** in the CSV.
11. Enter value **SYNC**.

# 2. Follow-Up Processes After Import

After importing, system may need to **adjust related data**.

1. Prerequisite object: **Centralized Services HRIS Event Publishing Configuration** (must be Active and Event Publish = Yes).
2. Configurations available in **Position Management Settings → Import**:
3. **Adapt Reporting Hierarchy** → updates reporting lines after import.
4. **Validate Position Assignment During Job Import** → checks status, multiple incumbents, FTE, etc.
5. **Adapt To Be Hired (TBH) Status** → updates vacancy status when employees are assigned/unassigned.
6. **Execute Reclassification or Transfer** → applies reclassification or transfers after job info imports.
7. **Manager or Hierarchy Adaptation** → updates hierarchy when job info imports change manager/position.
8. **Execute Job Relationship Sync** → updates job relationships if matrix positions are used.

# 3. Mass Change Run

1. A way to mass update positions using **business rules**.
2. Example: Apply rule → all positions in Legal Entity X → update Pay Grade.
3. **Steps**:
4. Define business rule (eligibility + action).
5. Run via **Manage Mass Changes for Metadata Objects**.
6. Effective-dated.
7. Can sync changes to incumbents.

# 4. Mass Data Management (MDM)

1. **Newer, UI-based method** (no coding rules required).
2. Benefits:
3. Filter/search positions easily (up to 999 max).
4. Modify multiple records at once.
5. Changes shown on screen (highlighted).
6. Save as draft → share with colleagues → review before submit.
7. Download logs for tracking.
8. **Permissions needed**:
9. Admin → Enable Mass Data Management.
10. User → MassChangeJob (create/manage requests).
11. MassChangesJobConfiguration (to configure UI).

# 5. Mass Change UI Configuration

Before creating requests, admin must **configure the UI**:

1. Use **MassChangesJobConfiguration** object in Manage Data.
2. Define fields:
3. **Filterable** (for searching positions).
4. **Editable** (fields that can be updated in bulk).
5. Example fields: Effective Status, Division, Job Code, Job Level, Incentive Plan.
6. Also configure **minRecordLimitToTriggerJob** (controls sync vs async processing).

# 6. Creating a Mass Change Request

Steps:

1. Go to **Mass Data Management** → Create request.
2. Select filters (Effective Date mandatory, plus up to 8 others).
3. Search results → select positions (max 999).
4. Click **Edit** → change editable fields (e.g., Incentive Plan, Job Level).
5. Save → draft → submit.
6. Monitor status until **Processed Successfully**.
7. Verify results / download logs.

# Example Exercise

1. Problem: Some managers have no Incentive Plan.
2. Solution:
3. Configure Mass Change UI (with fields like Incentive Plan editable).
4. Create request filtering by Position Title = Manager.
5. Edit all → set Incentive Plan = “Manager (MGR)”.
6. Submit.
7. Verify via logs.

# ✅ Summary (Easy Revision Points)

1. **Import/Export Positions** → via CSV + Import Data tool. Use technicalParameters = SYNC for synchronization.
2. **Follow-Up Processes** → system can adapt hierarchy, validate positions, update TBH, do transfers, and sync job relationships.
3. **Mass Change Run** → rule-based mass updates (needs business rules).
4. **Mass Data Management (MDM)** → UI-based, easier, no rules, supports max 999 positions.
5. **Permissions** → Mass Data Management + MassChangeJob + MassChangesJobConfiguration.
6. **UI Configuration** → define filterable & editable fields for mass change requests.
7. **Mass Change Request** → filter positions → edit multiple records → save draft → submit → verify via logs.

👉 Bro, do you want me to now prepare a **trainer-style Q&A (10–12 questions)** just from this topic (Importing & Mass Changes) so you can confidently ask your trainer and also prepare for exams?