# Position Management — exam-ready breakdown (clear, detailed, and practical)

Below is a focused, easy-to-remember explanation of **SAP SuccessFactors Employee Central Position Management** covering the major concepts, configuration points, best practices, common pitfalls, testing tips, an exam cheat-sheet, and **15 trainer-friendly questions** you can ask.

# 1) Quick summary / elevator pitch

**Position Management** creates and manages positions (seats) in a central repository. Positions store organizational and job data (department, location, job code, reporting) and can be staffed by employees. This enables planning (vacant positions → requisitions), consistent employee job data via propagation rules, incumbent tracking (temp staffing/LOA), and integration with Recruiting, Succession, and other modules.

# 2) Key objects & terminology (short defs)

1. **Position**: an MDF record representing a seat in the org. Can be vacant or occupied. Stores attributes that can be inherited by employees.
2. **Job Classification (job-code)**: the job definition (role/grade/etc.). Positions usually reference a Job Classification.
3. **Position Hierarchy**: org chart of positions (parent/child). Different from reporting/people org chart.
4. **Reporting Hierarchy** (People Org Chart): how employees report to managers (employee → manager).
5. **Incumbent**: an employee who currently holds/staffs a position.
6. **Open / Vacant Position**: position with no current incumbent — used for recruiting.
7. **Leading Hierarchy**: the hierarchy the system uses by default for org views and functions — Position Hierarchy is the default and recommended to keep.
8. **Propagation**: copying values from Job Classification or Position to the employee’s Job Information (using business rules).
9. **MDF (Metadata Framework)**: the platform structure used to create and manage Position objects.
10. **RBP (Role-Based Permissions)**: controls who can view/edit/create/staff positions and which positions they can see (target population).

# 3) How Position, Job Classification and Employee Job Info relate

Think of three layers (least → most specific):

1. **Job Classification** (generic job-level data: title, pay grade, employee class) — least specific
2. **Position** (a specific seat; may inherit from Job Classification but can override)
3. **Employee Job Information** (incumbent-level values; final source for people) — most specific

Propagation rules are used to copy the appropriate values from Job Classification → Position → Employee Job Info (or directly Position → Employee Job Info) so the employee inherits correct org/job attributes when assigned.

# 4) Position Hierarchy vs. Reporting (People) Hierarchy

1. **Position Hierarchy**: shows how seats relate (organizational structure). Useful for planning, succession, and seeing vacant roles.
2. **Reporting (People) Hierarchy**: shows employees and their managers (who reports to whom today).
3. Leading hierarchy determines what the system assumes is the “primary” structure — by default **Position Hierarchy**. Many Position Management features assume the position hierarchy is leading, so changing it can break behavior or reporting — **keep default unless you have a strong reason**.

# 5) Main benefits & integration points

1. **Workforce planning**: central list of authorized roles and open seats.
2. **Recruiting**: create requisitions directly from vacant positions (populates job details).
3. **Succession**: tag positions with successors and talent pools.
4. **Incumbent tracking**: handle temporary staffing, leaves, global assignments while preserving position rights.
5. **Fieldglass / Contingent labor**: position info can feed contingent worker requisitions and show them in org charts.
6. **Consistent job info**: reduce data errors via propagation instead of manual data entry.

# 6) Typical Position lifecycle (administrative actions)

1. **Create Position** (Manage Data / Import / UI) — assign code, job classification, location, department, parent position.
2. **Approval** (optional) — workflows can be used for creating/activating positions.
3. **Activate / Authorize** — position becomes available to staff/use.
4. **Staff** — assign an incumbent (hire or transfer into the position) or mark as vacant.
5. **Use** — recruit from position, track incumbent changes, build succession plans.
6. **Deactivate / Delete** — retire position when no longer needed (follow audit & historical retention rules).

# 7) Configuration & admin tools you’ll use

1. **Configure Object Definitions** — define the Position MDF object and its fields.
2. **Manage Data** — create, edit, import individual Position records.
3. **Import & Export Data** — bulk create/update positions.
4. **Configure Business Rules** — propagation rules, validations, workflows tied to position fields.
5. **Manage Permission Roles (RBP)** — who can create/edit/view positions, and target populations.
6. **Manage Workflow Groups / Manage Organization, Pay & Job Structures** — workflows or dynamic groups for approvals.
7. **Position Org Chart / People Profile** — UI displays and staff actions.

# 8) Business rules and propagation for positions

1. **Propagation**: typical rule copies Position fields to employee Job Information when an employee is assigned to a position (e.g., location, department, pay grade).
2. Rules can be **onChange** (field-level) or **onSave** (element-level) depending on UI flow and whether you need it to run during imports/history.
3. You may also create validation rules (raise message) to prevent incorrect position use (e.g., restrict multiple incumbents).

# 9) Role-Based Permissions (RBP) considerations

1. RBP must control:
2. who can **create, edit, activate, deactivate** positions,
3. who can **staff/unstaff** (assign employees),
4. who can **view** positions (target population + hierarchy visibility).
5. RBP for positions is typically granular — set different permissions for Central Admins, Regional Admins, HRBP, Recruiters, Hiring Managers.
6. Use dynamic groups / target populations so managers only see their relevant positions.

# 10) Incumbent tracking & special cases

1. Track temporary staffing (acting roles), leaves, global assignments and whether a person has right to return to their position.
2. System adapts reporting lines automatically when incumbents are temporarily out and a temporary staff is assigned.
3. Important for compliance (e.g., guaranteed right to return).

# 11) Open positions & recruiting

1. Vacant positions are a source for job requisitions. Requisition can be auto-populated with position fields (originator, hiring manager, location, job code).
2. Requisition management then drives recruiting; once candidate hired, they can be assigned to that position (staffing).
3. Contingent hires (Fieldglass) can also be linked to positions.

# 12) Governance, maintenance & reporting

1. Establish **central admin** and processes for creation/approval/deactivation.
2. **Audit reports**: regularly reconcile positions vs incumbents, check duplicates, confirm vacant positions are active, and remove stale ones.
3. Training and documentation for admins and regional teams is critical.

# 13) Common pitfalls & troubleshooting

1. **Changing leading hierarchy** — breaks assumptions; keep default unless planned thoroughly.
2. **Bad propagation logic** — wrong order or missing precedence causes wrong employee data.
3. **Permissions misconfigured** — users cannot view or staff positions.
4. **Import mistakes** — wrong business keys or not including parent position code causes hierarchy issues.
5. **Duplicate positions or inconsistent codes** — naming conventions and unique keys are essential.
6. **Mass changes without rule context** — mass job can trigger many workflows if contexts aren’t set correctly.

**How to test/troubleshoot:**

1. Create a test position with expected job/class attributes.
2. Assign a test user as incumbent (staff position) and confirm Job Information values propagate correctly.
3. Create requisition from vacant position and verify fields.
4. Test temporary incumbent assignment and verify reporting updates.
5. Use Manage Data / Import logs and audit reports for failures.

# 14) Best practices (practical)

1. Keep **Position Hierarchy** as leading hierarchy.
2. Use **clear naming & coding conventions** for positions (unique externalCode).
3. Implement **central governance** with documented workflows and approvals for position changes.
4. Use **propagation rules** rather than manual data entry where possible.
5. Apply **RBP** carefully: separate create/edit/activate/staff permissions.
6. Maintain **clean imports**: always include business keys and required fields.
7. Schedule **regular audits** to deactivate stale positions.

# 15) Quick exam cheat-sheet (one page)

1. **Position = seat; Job Classification = role definition; Employee Job Info = occupant-specific values.**
2. **Hierarchy order**: Job Classification → Position → Employee (propagation flows down).
3. **Leading hierarchy**: default = Position Hierarchy (keep it).
4. **Position lifecycle**: Create → Approve → Activate → Staff → Use → Deactivate.
5. **Main integrations**: Recruiting (requisition), Succession, Fieldglass, Org Charts.
6. **Tools**: Configure Object Definitions, Manage Data, Import/Export, Business Rules, RBP, Workflows.
7. **Key rule types**: Propagation (onChange), Validation (onSave), Workflow derivation (onSave).
8. **Permissions**: granular RBP for create/edit/staff/view.
9. **Test steps**: create position → staff user → verify propagation → create requisition → verify org charts.

# 16) Questions to ask your trainer (15 — moderate depth, not overly technical)

These are phrased so they show you studied but don’t sound like you memorized obscure config details. Use them to start a good discussion.

1. **What is the main functional difference between a Position and a Job Classification, and when would I use one vs the other?**
2. **Why is Position Hierarchy usually set as the leading hierarchy — what breaks if we change it?**
3. **How do propagation rules decide which value (job class, position, or employee) should win when they conflict?**
4. **Can a single position have multiple incumbents, and what are common business reasons to allow or prevent that?**
5. **What’s the typical approval flow (workflow) for creating or activating positions in a large organization?**
6. **How do recruiters create a requisition from a position — what fields get auto-populated?**
7. **What RBP permissions should a regional HR admin have vs a central HR admin for positions?**
8. **How is incumbent tracking handled when someone goes on long-term leave or global assignment?**
9. **What are the common causes of failed position imports and how do you fix them?**
10. **How does Position Management integrate with SAP Fieldglass for contingent labor?**
11. **When would you choose to use Position Management vs hiring without positions (job-based only)?**
12. **What reports or audit checks do you recommend to maintain position hygiene?**
13. **Which position fields are most commonly propagated to an employee’s Job Information in implementations you’ve seen?**
14. **How do we prevent mass changes from triggering hundreds of workflows accidentally when we update positions?**
15. **If a position’s job classification changes, what should we test to ensure incumbent job info remains correct?**

(If you want, I can also give you short model answers you can study so you’ll sound confident when your trainer asks follow-up questions.)

If you want now, I can:

1. Produce **one-page printable cheat sheet** (PDF or markdown) based on the cheat-sheet above, or
2. Give **short sample answers** to the 15 trainer questions, or
3. Create **10 flashcards** for quick revision.

Got it 👍 Let me break this lesson into clear exam-friendly points for you.

## ****Enabling SAP SuccessFactors Employee Central Position Management****

### ****Objective****

1. Learn how to set up **Position Management** in Employee Central.
2. Configure the **necessary permissions** for different roles.

### ****Key Considerations Before Implementation****

1. Check organization’s **long-term business goals**.
2. Review **integration requirements** (Recruiting, Succession, third-party tools).
3. Refer to SAP guide **“EC Position Management: Design Considerations & Recommendations”**.

### ****Prerequisites****

1. **Metadata Framework (MDF)** must be enabled.
2. Basic **Employee Central Core settings** should be configured.
3. Knowledge of **Foundation Objects, RBP, Business Rules, Workflows** is required.

### ****Two-Step Process to Enable Position Management****

1. **Enable in Settings**
2. Go to Manage Employee Central Settings.
3. Under “Others,” set **Position Management = ON**.
4. **Enable Position Field in Job Information**
5. Go to Manage Business Configuration (MBC) → HRIS Element **jobInfo**.
6. Ensure **Position** field is present and set **Enabled = Yes**.
7. If missing → add it manually (Label = “Position”).
8. Save changes.

⚠️ If “Manage Employee Central Settings” is missing → grant **Employee Central Feature Settings permission**.

### ****Assigning Role-Based Permissions (RBP)****

#### 1. ****For Position Field in Job Information****

1. Navigate to Manage Permission Roles.
2. Edit Role → Step 2 Add Permissions →
3. Under **Employee Central Effective Dated Entities → Job Information** → grant permissions:
4. View Current, View History, Edit/Insert, Correct, Delete.

#### 2. ****For Position MDF Object****

1. Go to Miscellaneous Permissions → Position object.
2. Grant permissions like:
3. View Current, View History, Create, Insert, Correct, Delete, Import/Export.
4. Use **Field Level Overrides** if needed (e.g., some fields Read-Only). ⚠️ Don’t override **mandatory fields**.

#### 3. ****For MDF (Metadata Framework)****

1. Permissions under Administrator Permissions → Metadata Framework:
2. Configure Object Definitions.
3. Configure Business Rules.
4. Import/Export.
5. Manage Configuration UI.
6. Manage Positions.
7. Manage Mass Changes.
8. Manage Sequences.

#### 4. ****For Position Management Tools****

1. Permissions available in Manage Position:
2. Access Position Org Chart.
3. Change Display Date.
4. Mass Copy Positions.
5. Create Positions.
6. Create/View Job Requisitions.
7. Select Job Requisition Template.
8. Access Position Management Settings.
9. (Optional) Fieldglass Job Requisition.

⚠️ Manage Employee Files permission is also required.

### ****Target Audience Restrictions (RBP)****

Four restriction options for Position object:

1. By field criteria (e.g., Company = Ace\_USA).
2. By hierarchy below **Granted User’s Position**.
3. By **Matrix Relationship** of positions.
4. By hierarchy below a **specific position code**.

🔹 Option to **Exclude access to user’s own position** also exists.

### ****Special Handling of Create Permission****

1. By default → Create ignores restrictions.
2. To enforce → set **CREATE Respects Target Criteria = Yes** in Configure Object Definitions.

### ****Roles & Responsibilities****

|  |
| --- |
| **Role** **Responsibilities** |

|  |  |
| --- | --- |
| **Manager** | Ensure employees in correct positions, update their team’s positions, create requests for new positions. |
| **Next Level Manager** | Approves budget/headcount, multiple approvals. |
| **HR Administrator / Org Design Expert** | Central role → create/deactivate/mass update positions, process hires. |
| **Regional Admin** | Similar to HR Admin but restricted to local region. |
| **HR Business Partner** | Mostly informed only, supports offline discussions. |
| **Recruiter** | Informed when new position created, starts requisition process. |

### ****Summary****

1. Enabling EC Position Management = **turn on setting + enable Position field**.
2. Permissions (RBP) control **who can view, create, or manage positions**.
3. Target criteria help restrict **which positions users can access**.
4. Multiple organizational roles (Manager, Admin, Recruiter, etc.) have **different levels of access**.

👉 Do you want me to now create **a simple flow diagram (step-by-step)** for enabling Position Management and assigning permissions so you can **quickly revise before your trainer asks**?

Perfect 👌 This topic is about the **Position Organization Chart (POC)** in SAP SuccessFactors Employee Central Position Management. Let me break it down into **exam-friendly notes** for you:

## ****Navigating the Position Organization Chart (POC)****

### ****Objective****

1. To use the **Position Org Chart** for:
2. Viewing position records.
3. Understanding hierarchy.
4. Performing actions (hire, requisition, create/copy positions).

### ****What is the Position Org Chart?****

1. A **hierarchical representation** of positions in the organization.
2. Shows positions (vacant or filled), their relationships, and key details.
3. Can display hierarchy for **past, present, or future dates** (because positions are effective dated).

**Access Path**: **Home → Company Info → Position Org Chart tab**

### ****Main Capabilities****

1. View hierarchy for any date (dynamic calendar).
2. View **position record details** (depending on permissions).
3. Search by **Positions** (ID, name, attributes) or **People** (name, username).
4. Show **key info on Position Card** (e.g., code, title, incumbent, staffing status).
5. Show **incumbent history** (who occupied the position and since when).
6. Create/manage positions:
7. From scratch.
8. Copy positions (mass copy up to 100).
9. Create **same-level** (peer) or **lower-level** (child) positions.
10. Edit/manage/deactivate positions.
11. Display:
12. Inactive positions.
13. Matrix positions (dotted-line reporting).
14. Child positions.
15. “To Be Hired” positions.
16. Export org chart as **PDF or image**.
17. Zoom in/out for visibility.
18. Integration actions:
19. Create job requisitions directly from vacant positions.
20. Hire employees into vacant positions.

### ****Display Options****

1. Search by: **Position** or **People**.
2. Default view → today’s date, but can change to past/future (if permissioned).
3. Options to show/hide:
4. Inactive positions.
5. Child positions.
6. Matrix relationships.
7. Insights panel → analytics and reports (if enabled).
8. Export as PDF/JPG.

### ****Position Card****

When you click a position → side panel opens (Position Card).

#### ****Sections in Position Card****

1. **Position Key Information** → Position code, title, staffing status, FTE, multiple incumbents allowed/not.
2. **Position History** → Effective start date, duration, changes over time.
3. **Position Hierarchy Details** → Positions below, FTEs, incumbents, open seats.
4. **Incumbent Details** → Current holder, start date, FTE, photo, quick card link.
5. **Right to Return / Global Assignment** → If incumbent is on leave or global assignment.
6. **Job Requisition Details** → Linked requisition, openings, status, hiring manager.

### ****Actions from Position Card****

1. **Show Details** → Edit/manage full position record.
2. **Show Incumbent History** → Past & future incumbents.
3. **Create Lower-Level Position** → Add child position (inherits fields via business rule).
4. **Create Same-Level Position** → Add peer position (inherits fields via business rule).
5. **Copy Position** → Duplicate with same attributes (up to 100 copies).
6. **Create Job Requisition** → Directly open requisition for hiring.
7. **Add New Employee to Position** → Start hiring workflow (fields auto-populated).

⚠️ Conditions for "Add New Employee":

1. Position must have status **To Be Hired**.
2. Company field must be set in position.

### ****Configuring Display****

1. Done via **Org Chart Configuration tool**.
2. You can:
3. Choose fields displayed on position tile.
4. Choose sections in Position Card.
5. Enable incumbent photo.
6. Reorder field display.

### ****Exercises (Examples)****

1. Search for **Logistics Manager (MGR\_LSTS)** → see incumbent Kim Nelson.
2. She has occupied it since **July 1, 2012**.
3. Copy her position → creates a new “To Be Hired” position.
4. Supervisor = **Jeff Bowman (Plant Manager)**.
5. Hiring status = **To Be Hired**.
6. Staffing = **Understaffed (0 of 1 FTE)**.

### ****Summary****

1. **Position Org Chart = primary tool** to view/manage positions.
2. Helps identify open roles, successors, and workforce planning.
3. Allows multiple actions → hire, requisition, create/copy/deactivate positions.
4. Position Card gives detailed view: history, hierarchy, incumbent, requisitions.
5. Fully configurable (fields, sections, display options).

👉 Do you want me to now prepare a **side-by-side comparison of Position Org Chart vs Employee Org Chart** (since many students confuse them in exams and interviews)?