

Reading Sample

Foundation objects are categories or structures for listings of data that are set up to be used across an entire company. This chapter will walk you through overviews, configuration, creation, and extension.



"Foundation Objects"



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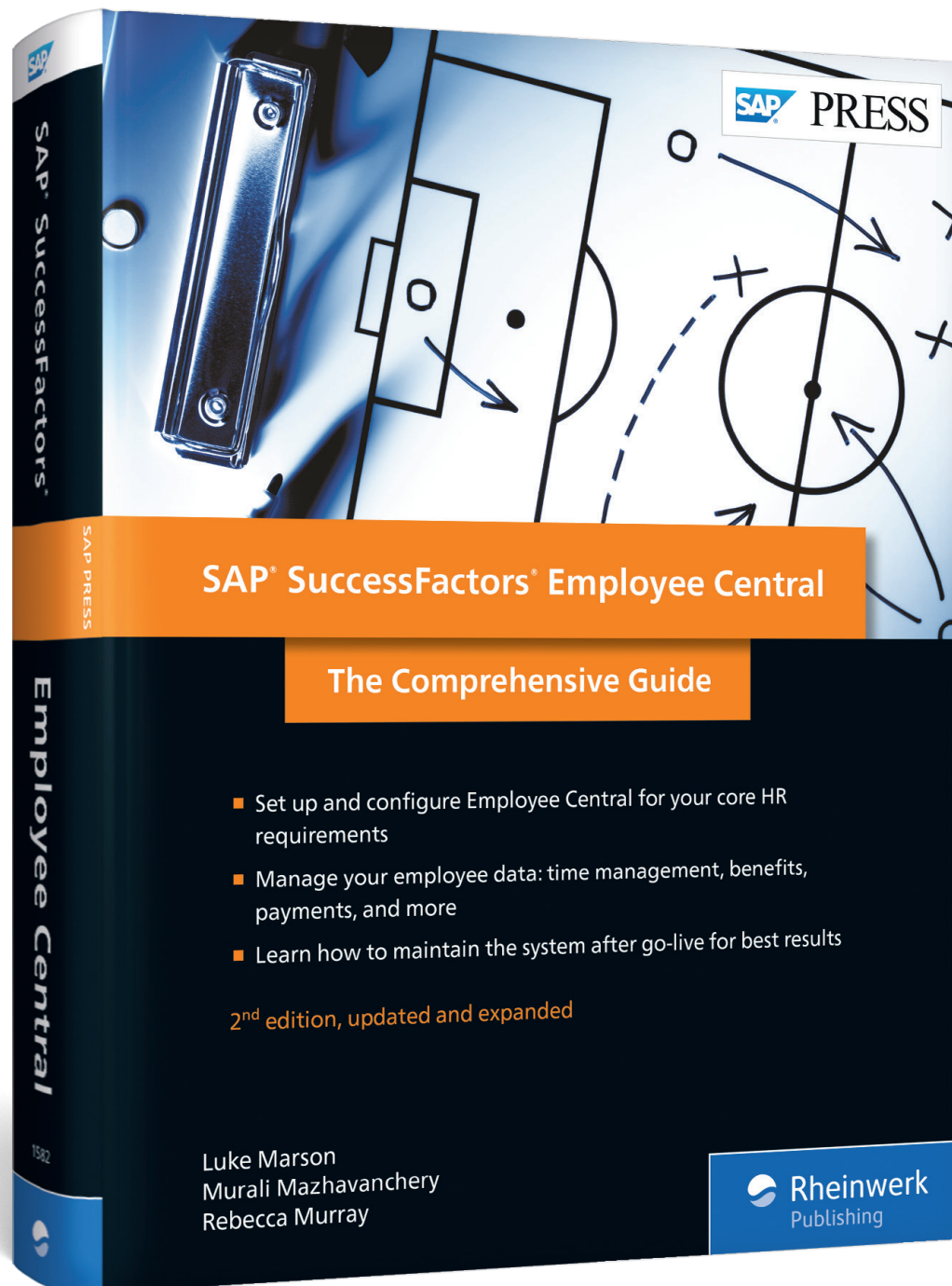
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Chapter 7

Foundation Objects

Foundation Objects are the building blocks of employee records within Employee Central. By creating a listing of data values from which to populate employee records, we are assured standardized data that is consistent and reportable.

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Valid, consistent, and organized data is an absolute must for any organization looking to execute meaningful reports and simplify data entry processes. Having set values to choose from when populating a field provides consistency. Organizing these set values and giving them characteristics of their own takes this process further. In Employee Central, we accomplish this task by utilizing Foundation Objects.

In this chapter, we'll introduce you to the Employee Central Foundation Objects, beginning by walking through an overview of key terms and differences between regular Foundation Objects and MDF Foundation Objects (see Section 7.1). In Section 7.2, we'll dive into the different categories to define Foundation Objects. Then, in Section 7.3, we'll see how Foundation Objects work together through the use of associations and propagation. Section 7.4 will walk through the configuration of Foundation Objects before we finally move on to the creation and extension processes in Section 7.5 and Section 7.6, respectively.

Let's begin with an overview of the basics.

7.1 Basics

Foundation Objects are categories or structures for listings of data that are set up to be used across an entire company. Each object has a series of defining data fields associated with it that extends its characteristics. It's sometimes easy to think of Foundation Objects as index cards or card catalog entries from the library. Each object has a series of acceptable values, or cards. When you pick a card and examine it, you will see additional characteristics of that card's value. These characteristics help further define an employee who is assigned an object.

Foundation Objects offer a single, pre-delivered list of values a user can select from when populating a data field. There are several benefits to using Foundation Objects in Employee Central, some of the most important of which are as follows:

- Eliminates the need for an end user to determine a free text entry for a field.
- Resulting standardized values can be easily reported on and/or used as report filters.
- Provides the ability to build in known associations between Foundation Objects, whereby one selected value helps drive available values in a second field.
- Provides the ability to have data propagate or autofill from one field to another based on the selected Foundation Object. This helps to streamline the data entry process because fewer fields need to be entered manually.

There are quite a few key terms to know and structures of which to be cognizant in order to take full advantage of all that Foundation Objects have to offer. Let’s explore these terms and structures together.

7.1.1 Structures and Key Terms

On the surface, Foundation Objects are just structures for defining selection sets or listings of data values available to populate a given field—but they are more than that. Attached to each value is a list of properties that can be applied or inherited along with the value.

Location, for example, may have a sample value of **World Headquarters Atlanta**. However, when setting up this value we also included an address of **123 Main Street, Atlanta, Georgia**, as one of its characteristics. When you select **World Headquarters Atlanta** as an employee’s work location, you know not only the Location where an employee works, but also the specific address of the Location, all without having to enter in an address on the employee’s record (see Figure 7.1). This is one powerful aspect of Foundation Objects.

Another key aspect of Foundation Objects is that they are *effective-dated*. This means that you store historical records and document changes to items as an organization changes. If a department name changes or a restructuring occurs, you do not lose any previous records. Instead, you can end date one record and place the new record on top. You can also delimit records no longer in use so that they cannot be selected and assigned to employees.

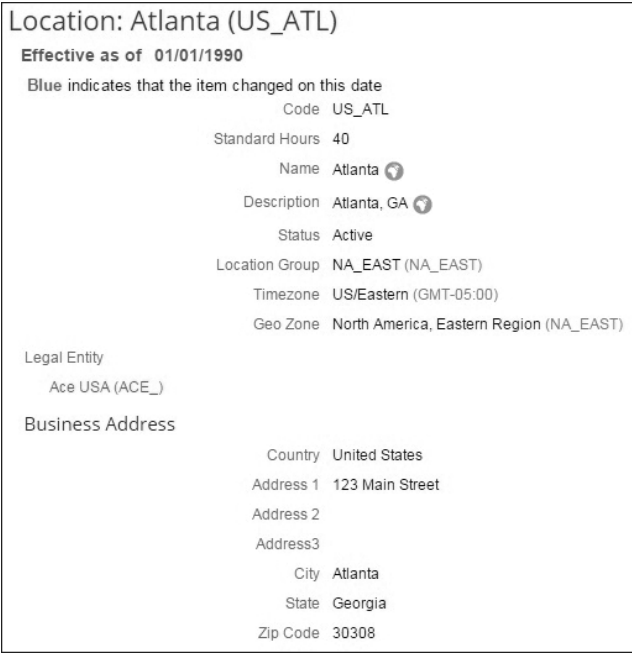


Figure 7.1 Location Foundation Object

We sometimes throw around terms interchangeably when working with Foundation Objects. A Foundation Object is the type of data listing you want to define, such as Location in the previous example. *Foundation Data* refers to the customer-specific values that populate your Foundation Object.

Looking back to the previous example, World Headquarters Atlanta would be an example of Foundation Data because it is a specific master data entry listed for a specific customer.

You store Foundation Data in Employee Central in *Foundation Tables*. Although each of these three terms—Foundation Object, Foundation Data, and Foundation Tables—refer to different and unique things, they are often used interchangeably. It’s up to us to determine whether a colleague or document is referring to the definition of a structure (Foundation Object) or the customer-specific master data populating the structure (Foundation Data).

For those of you interested in technical or system jargon, Foundation Objects are defined in the Employee Central system as *HRIS elements*. These HRIS elements are effective-dated, meaning you store a start date and end date for records related to

these objects. If our World Headquarters in Atlanta moved buildings, the new address could be recorded with a particular start date and the previous address saved for historical purposes. You do not need to overwrite entries in order to support current data. Each Foundation Object or HRIS element can have multiple characteristic data fields or properties that help define the object. These fields are known technically in the system as *HRIS fields*. The address state of Georgia in the preceding Location scenario is an example of an HRIS field. Each Foundation Object or HRIS element has a **Code** field, a **Name** field, and a **Start Date** field.

7.1.2 Foundation Objects versus MDF Foundation Objects

There is an in-process plan to migrate existing Foundation Objects from their current platform, defined in XML data models, to being defined on the Metadata Framework (MDF). The MDF provides customers more options and flexibility in their Object Definitions and gives the option to skilled customer admins to make configuration changes as needed, because the MDF is accessed in the graphical user interface (GUI) found within the Admin Center. These MDF Foundation Objects are sometimes also referred to as *Generic Objects* (the term given to objects defined within the MDF). At the time of publication (Fall, 2017), the following Foundation Objects have been successfully moved to the MDF:

- Legal Entity and Legal Entity Local
- Business Unit
- Division
- Department
- Cost Center
- Job Classification and Job Classification Local
- Job Function
- Pay Calendar
- Pay Group
- Job Family (now considered to be deprecated)

This means that configuration and associations for these objects occurs in the MDF portion of the Admin Center and not in the XML data models that traditionally used to define these objects. Permission settings and Picklist definitions vary slightly as well.

Now that we’ve provided a basic overview of the structure of Foundation Objects and some important keys terms and discussed the differences between regular and MDF Foundation Objects, let’s turn our attention in the next section to the different categorizations of Foundation Objects.

7.2 Categories

There are three key categories that nearly all Foundation Objects can be sorted into: Organizational, Job, and Pay. Other Foundation Objects that do not fit into one of these major categories can be grouped together and labeled as Miscellaneous. Table 7.1 provides a complete listing of these objects. The key categories are defined as follows:

- **Organizational**
These objects help create a company organizational structure and identify where in the structure an employee is found.
- **Job**
These objects help keep a consistent job catalog and are used to classify an employee’s work assignment and job-related characteristics.
- **Pay**
These objects allow you to store tables of pay-related data, including payment types, groupings, and information related to payroll calendars.
- **Miscellaneous**
Foundation Objects that do not fit into one of the above three main categories.

Organizational	Job	Pay	Miscellaneous
<ul style="list-style-type: none">■ Company/ Legal Entity*■ Business Unit*■ Division*■ Department*■ Location■ Location Group■ Cost Center*■ Geozone	<ul style="list-style-type: none">■ Job Classification*■ Job Function*	<ul style="list-style-type: none">■ Pay Component■ Pay Component Group■ Frequency■ Pay Group*■ Pay Calendar*■ Pay Grade■ Pay Range	<ul style="list-style-type: none">■ Event Reasons■ Workflow Configuration■ Workflow Contributor■ CC Role■ Dynamic Role

*Available as a MDF Foundation Object.

Table 7.1 Foundation Object Categories

Let’s take a look at the Foundation Objects shown in Table 7.1 and briefly discuss their use.

7.2.1 Organizational

Organizational objects provide the organizational structure of a company and align each employee within that structure. The components used are as follows:

- **Company/Legal Entity**
The terms *Company* and *Legal Entity* can be used interchangeably. This is the highest-level building block for an organizational structure and is a required field on an employee’s record. As true legal entities are established and registered in a single country, so too are Legal Entity objects. Each instance of a Legal Entity (Company) object must be tied to one and only one country. This country assignment helps drive which country-specific fields to display on an individual employee’s record. It also helps determine local currency, language, and standard working hours (optional for this object) for employees assigned to the company.
See Section 7.4.2 of this chapter for information about *Country* and *Currency* assignments on the Company/Legal Entity object.
- **Business Unit**
A *Business Unit* represents a breakout of operating functions within an organization. It is the second level building block in an organizational structure and can span across multiple companies and countries.
- **Division**
A *Division* is the third level of an organizational structure and usually starts to narrow down an employee’s position within a company. Depending on an organization’s structure, we often see Division tied to either a Company or a Business Unit as a further defining point.
- **Department**
A *Department* is the fourth and most specific level of an organizational structure. It usually narrows down the group or team that an employee reports to and is often headed by the employee’s manager. We often see a Department fall directly subordinate to a Division.

Don’t Have Four Levels to Your Organizational Structure?
Don’t worry if you don’t have four levels to your organizational structure. These four objects reflect commonly used organizational structures, but your organization may

have more or fewer than four levels. Within Employee Central, you can remove and reorganize these four levels and even add additional levels if warranted.
If a level needs to be removed, we recommend removing the Business Unit. Legal Entity is a required level, and Division and Department are key filters for other SAP SuccessFactors modules. Therefore, if you need to remove one level, Business Unit’s absence will have the least impact across the entire system suite.

- **Location**
A *Location* is a specific physical work place for an employee. Each location can have a country-specific address.
- **Location Group**
A *Location Group* is a combination of multiple Locations for reporting or filtering purposes. This value does not display directly on an employee’s record, but is derived by the system to assist administrators. An example of a Location Group is an entry called “Europe” that groups together all of the specific Locations within Europe. When running a report for that region, an HR manager would not need to select each individual Location but could instead select the Location Group.
- **Cost Center**
A *Cost Center* is usually a budget unit defined by your organization’s financial system. It is not a direct part of an organizational structure but rather part of a financial or budget structure. Many companies align Cost Centers to Departments. If such a relationship exists, then you can utilize this information to help streamline data entry using associations, as discussed in Section 7.3.1.
- **Geozone**
A *Geozone* is a grouping of Locations that typically fall within the same cost-of-living spans. Use Geozone to help offset higher- and lower-than-average costs of livings and their impact to the salary range. A high-cost-of-living area may have a special premium or adjustment percentage allotted to it, whereas a low-cost-of-living area may have a reduced range. Geozone contains a field called **Adjustment Factor** to help indicate the offset amount when reviewing salary ranges.

7.2.2 Job

Job objects allow for a consistent and consolidated job catalog and have the advantage of sharing their characteristics with employees through inheritance. The components used are as follows:

■ Job Classification

A *Job Classification*, sometimes referred to as *Job Class*, *Job Code*, or simply *Job*, is a specific job or role within an organization. It helps identify what work an employee does and how that work is classified. Job Classification is a key element in the system. You can derive many characteristics from a Job and apply them directly to the employee. Characteristics such as Employee Type, Regular/Temporary, and Employee Class are just a few examples.

■ Job Function

A *Job Function* helps you sort jobs based on functional work performed. This is a field that allows HR managers to grab groups of employees who perform similar work or functions. Job Functions can be very broad (i.e., Information Technology Group) or very specific (i.e., Accountants). Try to find a balance between being too general and too specific based on the reporting needs of your company and the generalness/specificity used in determining your Job Classifications and/or Business Units. You don't want to recreate data just for the sake of having it here.

7.2.3 Pay

Pay objects are used to handle pay- and compensation-related data. They include information about not only payments and deductions, but also frequency and pay periods. These objects include the following:

■ Pay Component

A *Pay Component* is a specific payment or deduction assigned to an employee. Each specific type is denoted through a separate Pay Component. Pay Components can be one-time (such as a retention bonus) or recurring (such as annual salary). Pay Components are ideally defined globally, but on occasion some country-specific listings may be required. Modifications to the standard-delivered Pay Component setup can render Pay Components country-specific. If you do not provide a currency when creating an instance of a Pay Component, then the system will default to the employee's local currency.

Wage Types

Pay Components in SAP SuccessFactors are typically called *Wage Types* in on-premise SAP ERP Human Capital Management (HCM).

■ Pay Component Group

A *Pay Component Group* is a grouping together of various Pay Components. This is helpful when looking for summations, totals, and annualizations, for example. A great example of a simple Pay Component Group is *Total Annual Compensation*, which can be a sum of annual salary and annual bonus. Pay Component Groups are able to convert various frequencies and currencies and display an annualized amount.

Currency Exchange Rates

Pay Component Groups must have a currency exchange reference to access in order to group together pay components of differing currencies. This functionality is stored as a generic MDF object known as *Currency Exchange Rate*. The Currency Exchange Rate is a standard delivered MDF object that replaced the previously used *Currency Conversion Rate Tables*. The new object definition is **CurrencyExchangeRate** under **Configure Object Definitions**. To view and maintain conversion values, go to **Manage Data** and create or search for **Currency Exchange Rate**. An example of such an entry is shown in Figure 7.2.

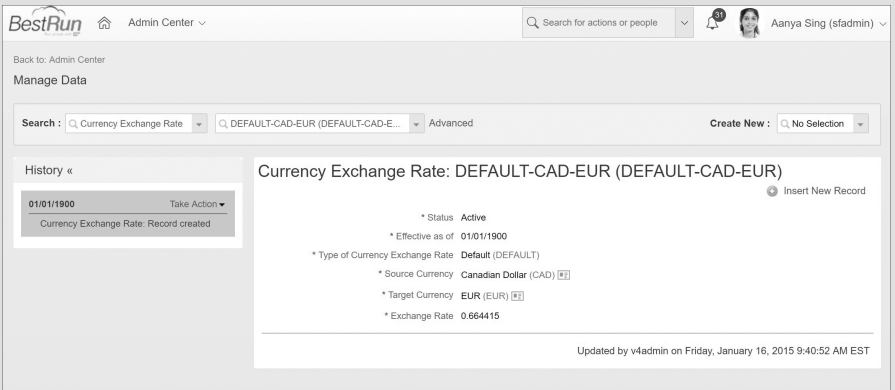


Figure 7.2 Example of a Currency Exchange Rate Entry

Technical Wage Types

Pay Component Groups in SAP SuccessFactors are typically called *Technical Wage Types* in on-premise SAP ERP HCM.

■ **Frequency**

Each pay component must have a designated *Frequency* to indicate at what interval the payment is made. Examples include one-time (payments), annual (salary), and hourly (wage).

■ **Pay Group**

A *Pay Group* is a grouping together of employees with the same payroll run information. These groupings are typically determined by your payroll system.

■ **Pay Calendar**

For each Pay Group, there is the option to use a *Pay Calendar*. A Pay Calendar holds information about a Pay Group's pay periods, including work period, pay dates, and check dates.

■ **Pay Grade**

A *Pay Grade* is a grade or a level on a pay scale that indicates where in a fixed structure of pay ranges an employee falls. This field is typically tied directly to a Job Code. A Pay Grade will typically point to a Pay Range or another type of pay structure.

■ **Pay Range**

A *Pay Range* is a span of pay that is typically awarded for a particular Pay Grade. Because Pay Grade is typically tied to Job Code, another way to interpret Pay Range is that it is a span of pay typically applied to a Job. An employee holding a specific Job would likely or should likely have a salary or hourly wage found within the Pay Range. A Pay Range is used to help compute Compa Ratio and Range Penetration. These values indicate how well an employee's pay fits into the Pay Range guidelines.

7.2.4 Miscellaneous

Miscellaneous Foundation Objects is the classification for all other standard delivered Foundation Objects as well as most of the custom (customer specific) Foundation Objects (especially those not used to augment the organizational structure). They include information about workflows and transaction event reasons. These objects include the following standard delivered items:

■ **Event Reason**

An *Event Reason* is a code assigned to an event or transaction on the employee record side to indicate why a particular change has taken place. This helps with reporting because you can tell not only how many new hires or terminations you've processed in a given period but also why these actions have taken place. Turnover reports are much more meaningful if you can designate not only the

number of departures but also why employees terminated their employment. Event Reasons are typically defined globally to allow for global standardization and reporting. Modifications can be made to the standard configuration to permit for country-specific Event Reasons, if needed. In this scenario, you may sacrifice some global reporting capabilities.

■ **Workflow Configuration**

The *Workflow Configuration* object allows you to define workflow routings and approvers. Types of participants available are Approvers, Contributors, and CC Participants. More information about workflows can be found in Chapter 4, Section 4.3.

■ **Workflow Contributor**

A *Workflow Contributor* is a person who contributes to a workflow. This Foundation Object is somewhat misleading, because the various types of Contributors (Role, Dynamic Role, Person, Dynamic Group) are defined outside of this object and merely referenced within this object for importing purposes. The actual assignment of a Contributor to a workflow can also happen within the workflow definition itself if defined within the Admin Center.

■ **CC Role**

A *CC Role* is a person or persons (Role, Dynamic Role, Person, Dynamic Group, External Email Address) that receive notice of a completed workflow. This Foundation Object is somewhat misleading, because the various types of CC Participants (Role, Dynamic Role, Person, Dynamic Group, External Email Address) are defined outside of this object and merely referenced within this object for importing purposes. The actual assignment of a Contributor to a workflow can also happen within the workflow definition itself if defined within the Admin Center.

■ **Dynamic Role**

A *Dynamic Role* is a workflow participant that varies based on data criteria at the employee level. If the intention is to send the workflow to the head of an employee's faction, then the system can determine this recipient based on the employee's faction assignment. The recipient therefore varies based on the employee involved in the workflow.

7.3 Associations and Propagation

Now that you've learned a little about each Foundation Object, let's explore how they work together and enrich the system. Two key means of doing so are through *associations* and *propagation*.

7.3.1 Associations

Foundation Objects can be tied together using relationships known as associations. We put associations in place to help with data entry and validation. If your organization rolls Departments up into Divisions, then you have a relationship between the Department and Division objects. When you hire a new employee into a certain Division, you don't want to have to sort through all Departments to find the correct assignment. You only want to see the Departments that roll into that Division. An association assignment will help you do just that.

An association identifies which two Foundation Objects are related, in which direction the relationship flows, and the degree of the relationship. In the previous example, the related objects are Division and Department. The relationship flows up from Department to Division and allows for multiple Departments to flow into a single Division. This is known as a one-to-many association. If each Division only contained one Department, then you could set up a one-to-one association. This is the case with Pay Grades and Pay Ranges. Each Pay Range can be assigned to only one Pay Grade.

Associations help with data accuracy because data entry persons do not need to scroll through irrelevant values or impossible data combinations. Only relevant and possible values are presented. Associations are assigned for Foundation Objects directly in the Corporate Data Model or directly in the MDF Foundation Object Definition.

7.3.2 Propagation

Propagation is a tricky principle to master, but it yields huge benefits when working with employee records. The concept of propagation is that you can assign a Foundation Object to an employee's record and use that assignment to auto-populate values of related fields on the employee's record. This is possible as long as the related field has a corresponding entry on the Foundation Object side.

Let's look at an example. Say you have a Foundation Object called Location (see Figure 7.3). This Location has a characteristic field called **Timezone**. This makes sense because each Location can have a specific timezone attached to it. For this example, say your **Location** value is **Atlanta, Georgia** and the corresponding **Timezone** is **Eastern Standard Time (EST)**. When you assign an employee to the Atlanta location, you don't want to search through a list of timezones to find the correct one. You've already stored the matching timezone in the Foundation Tables and want the system to pull that value for you. Propagation will populate the **Timezone** field on the employee record with

Eastern Standard Time (EST) if you have propagation set up properly. No entry is needed.

The screenshot shows a web form titled "Organizational Information". It contains several dropdown menus with search icons:

- * Company: Ace USA (ACE_)
- * Business Unit: Corporate Industries (ACE_IND)
- Division: Industries Test (IND)
- Department: Sales (SALES)
- Location: Atlanta (US_ATL)
- Cost Center Account: Direct Sales (31300)

 Below this is a section titled "Job Information" which contains a "Timezone" dropdown menu set to "US/Eastern (GMT-05:00)".

Figure 7.3 Selecting Location Drives the Value of Timezone via Propagation

Propagation is beneficial when trying to populate job attributes on an employee record. Many data fields are already stored as characteristics of a Job Code and can be defaulted in using propagation. This will help save time and help with data accuracy. Data entry people don't need to search for values; the values are presented for them instead. If there happens to be a deviation from a standard assignment, the value can always be overwritten at the time of entry directly on the employee's record.

All propagations are configured in the *Propagation Data Model*. An implementer can retrieve a best practices copy of the XML data model from the SAP Service Marketplace. That copy contains several commonly used propagations and can be edited to tailor existing scenarios to a company's needs and to add additional propagations. Once modifications are made, the revised Propagation Data Model should be imported into the company's system by the implementer, as shown in Figure 7.4.



Figure 7.4 Provisioning Import Path for the Propagation Data Model

Now that we’ve looked at how associations and propagations help Foundation Objects work together, we’ll walk through the basic configuration of Foundation Objects.

7.4 Configuration

Foundation Object configuration takes place after requirements gathering and is fine-tuned during the project iterations. Configuration involves taking the customer requirements and building out the foundational structures to support these requirements. With the migration process from traditionally configured Foundation Objects to MDF Foundation Objects currently ongoing, we must explore two different configuration methods: configuration via a data model and configuration within the MDF.

Take Care During Requirements Gathering

Take care during requirements gathering to discuss the concepts of propagation and association. These two characteristics of Foundation Objects highlight the benefits of using Foundation Objects as opposed to elaborate Picklists throughout the system. Please be sure to compare Foundation Object fields with employee data fields and build in additional fields where applicable on the Foundation Object side to help support propagation. The use of custom fields can be beneficial here.

7.4.1 Corporate Data Models

The traditional (and eventual legacy) method of configuring Foundation Objects is by using XML data models. This is the only method to configure non-MDF Foundation Objects. The data models used to configure Foundation Objects are referred to as the Corporate Data Model and the Country-Specific Corporate Data Model because they help us define our company structures. The Corporate Data Model is used to define global object definitions, whereas the Country-Specific Corporate Data Model is used to define country-specific or local object requirements. These two data models work together almost in a parent–child manner.

XML Data Models

An *XML data model* is a technical design that allows you to structure your data for storage and transmission within Employee Central. Using data models, you can

structure which data elements and fields to define in your system. SAP SuccessFactors uses a series of best practices or commonly used setups in its data models. An implementer will work to personalize these data models according to each customer’s business requirements. These models can be downloaded from the SAP Service Marketplace by permitted implementers.

Structure of Corporate Data Models

Each Foundation Object is defined by an HRIS element, which has a technical name and is referred to by this technical name in the data model. One example is Location Group, shown in Figure 7.5, which has an HRIS element name of `locationGroup`. Each HRIS element has a series of properties that help define it (see Figure 7.5).

```
<hris-element id="locationGroup">
  <label>Location Group</label>
  <label xml:lang="ar-SA">مجموعة المواقع</label>
  <label xml:lang="bg-BG">Група на местоположение</label>
  <label xml:lang="bs-BS">Kumpulan Lokasi</label>
  <label xml:lang="bs-ID">Kelompok Lokasi</label>
  <label xml:lang="cs-CZ">Skupina umístění</label>
  <label xml:lang="cy-GB">Grŵp Lleoliad</label>
  <label xml:lang="da-DK">Stedgruppe</label>
```

Figure 7.5 HRIS Element locationGroup

Each HRIS element has a series of HRIS fields that store data relating to the HRIS element. Figure 7.6 shows an example of how these fields are defined within the data model. Each field has a series of properties that help define it:

- **label**
A label that can be translated into supported languages. This label becomes the field name on the Foundation Object screen. A separate label line is included for each label translation needed.
- **visibility**
A visibility setting that indicates whether a field should be turned off, read-only (for system-calculated fields), or editable. The field’s values are *none*, *read*, and *both*.
- **required**
A required setting that indicates whether a field is mandatory or not. Its values are *true* and *false*.
- **max-length**
A field length indicating how many characters the field should support.

- **id**
An ID representing the field’s technical field name. If a standard field is being used, then the `id` value is supplied by SAP SuccessFactors. If a custom field is being created, then a custom field `id` should be used.
- **maximumFractionDigits**
A setting that indicates how many decimal places are supported for numeric fields (not shown in Figure 7.6).
- **showTrailingZeros**
Defines whether trailing zeroes are shown after the decimal place. Its values are `true` and `false`.
- **pii**
A Personally Identifiable Information (PII) setting that indicates if the field contains sensitive data that should be masked from regular view. Its values are `true` and `false`.

```
<hris-field max-length="128" id="description" visibility="both" required="false" pii="false" showTrailingZeros="false">  
  <label>Description</label>  
  <label xml:lang="ar-SA">الوصف</label>  
  <label xml:lang="bg-BG">Описание</label>  
  <label xml:lang="bs-BS">Perihalan</label>  
  <label xml:lang="bs-ID">Deskripsi</label>  
  <label xml:lang="cs-CZ">Popis</label>  
</hris-field>
```

Figure 7.6 HRIS Fields

If the field is a selection set that should reference a Picklist, then the Picklist is assigned at the bottom of the HRIS field definition using a Picklist assignment statement, as shown in Figure 7.7.

```
<hris-field max-length="32" id="jobLevel" visibility="both">  
  <label>Job Level</label>  
  <label xml:lang="ar-SA">المستوى الوظيفي</label>  
  <label xml:lang="bg-BG">Ниво на длъжност</label>  
  <label xml:lang="bs-BS">Peringkat Kerja</label>  
  <label xml:lang="bs-ID">Tingkat Pekerjaan</label>  
  <picklist id="jobLevel" />  
</hris-field>
```

Figure 7.7 HRIS Field Definition with Picklist Assignment at the End

Custom Fields

Custom fields are fully supported in both data models. Custom strings and numerous dates, longs, and doubles are available for use.

Associations

Associations between Foundation Objects are configured directly within the Corporate Data Model at the end of the configuration of all HRIS fields. The association statement links together the Foundation Object with its associated Foundation Object. Figure 7.8 shows an example of an association between Location and Geozone specifying that each Location can have one and only one Geozone.

```
<!-- Begin Location Associations -->  
<hris-associations>  
  <association id="id" multiplicity="ONE_TO_ONE" destination-entity="geozone" required="false" />  
</hris-associations>  
<!-- End Location Associations -->
```

Figure 7.8 Association between Location and Geozone Defined Within the Corporate Data Model

Country-Specific Corporate Data Model

The Country-Specific Corporate Data Model functions in the same manner but is organized first by country and then by HRIS element. Each supported and configured country has a separate segment within the file. Note that not all HRIS elements/Foundation Objects are able to support a country-specific setup. Within the traditional XML-defined setup, the following areas have standard-delivered country-specific setups for various countries:

- Corporate Address for Location
- Job Classification

Custom fields are also supported in this data model. All properties for an individual custom field, except for Label, must be defined the same way across all the countries for which they are used.

Company

Company/Legal Entity also supports country-specific requirements; however, this object has been migrated to be an MDF Foundation Object. Therefore, its country-specific settings are handled within the MDF.

Caution

Please review basic XML protocol carefully if you’re attempting to modify these data models. Be warned that several different fields may have the same labels and/or

technical field names. For Employee Central, we work with the HRIS fields defined within HRIS elements. Standard elements are used elsewhere in SAP SuccessFactors, but not directly in Employee Central.

After tailoring the data models for a customer, we can import them in to the system using Provisioning. After selecting the **Company Name** from your **Provisioning** main screen you are able to find import links for uploading and downloading data models.

7.4.2 Configuring MDF Foundation Objects and Object Definitions

Configuration for MDF Foundation Objects takes place directly within SAP SuccessFactors via the **Configure Object Definitions** area of Admin Center. Navigate as follows: **Admin Center • Company Settings • Configure Object Definitions**.

An Employee Central-provisioned SAP SuccessFactors system will come delivered with best practices definitions for all MDF Foundation Objects. The job is just to modify as needed to meet your company requirements.

Once you have navigated to the **Configure Object Definitions** section of Admin Center, you should see the screen shown in Figure 7.9. In the top-right corner, you'll see the option to **Create New** objects. In the top-left corner, you'll see the option to **Search** for existing objects and Picklists. Your MDF Foundation Objects are already defined, so select **Object Definition** in the first dropdown next to **Search** and then the MDF Foundation Object you wish to modify in the second dropdown box.

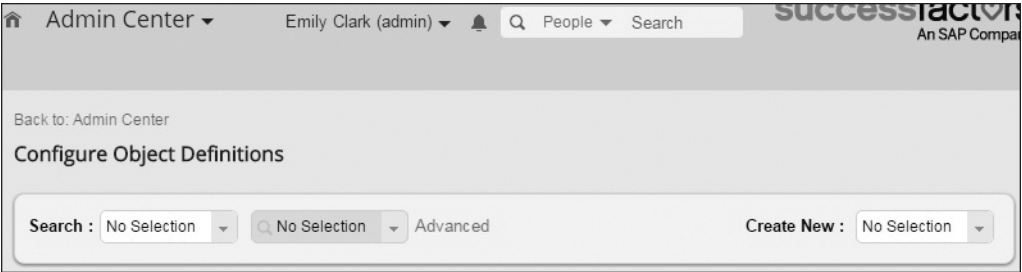


Figure 7.9 Entry Screen for Configure Object Definitions

Figure 7.10 shows the basic definition for our Division MDF Foundation Object. The basic properties are set at the top (Figure 7.10), and the **Fields** are shown at the bottom (Figure 7.11).

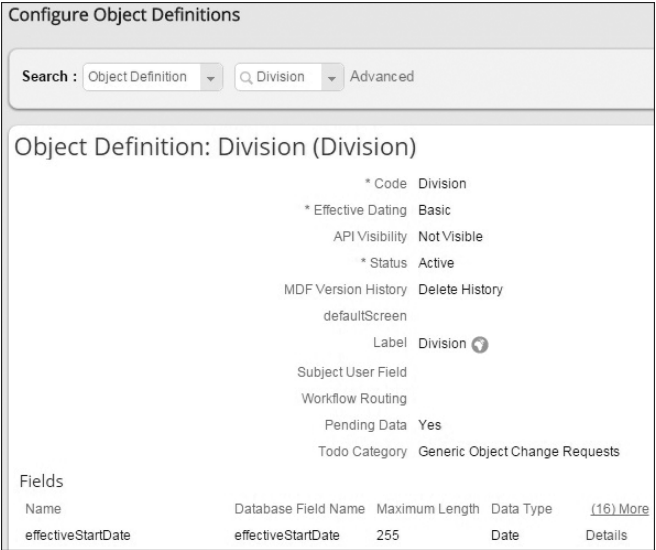


Figure 7.10 Division MDF Foundation Object

Fields				
Name	Database Field Name	Maximum Length	Data Type	(16) More
effectiveStartDate	effectiveStartDate	255	Date	Details
mdfSystemEntityId	entityId	255	String	Details
mdfSystemRecordId	recordId	255	String	Details
mdfSystemObjectType	objectType	255	String	Details
mdfSystemProxyUser	proxyUser	255	String	Details
mdfSystemRecordStatus	recordStatusStr	255	Enum	Details
mdfSystemTransactionSequence	transactionSequence	255	Number	Details
mdfSystemVersionId	versionId	255	Number	Details
externalCode	externalCode	32	String	Details
name	externalName	32	Translatable	Details
description	sFields.sField1	128	Translatable	Details
effectiveStatus	effectiveStatusStr	255	Enum	Details
effectiveEndDate	effectiveEndDate	255	Date	Details
headOfUnit	sFields.sField2	255	User	Details
parentDivision	sFields.sField3	255	Generic Object	Details
createdDate	createdDate	255	DateTime	Details
createdBy	createdBy	255	String	Details
lastModifiedDate	lastModifiedDate	255	DateTime	Details
lastModifiedBy	lastModifiedBy	255	String	Details
rowId	id	255	Number	Details
internalId	internalCode	255	Number	Details
Associations				
Name	Multiplicity	Destination Object	Type	(9) More
cust_toBusinessUnit	One To Many	Business Unit	Valid When	Details

Figure 7.11 Division Fields

Associations tying together MDF Foundation Objects are made directly within the MDF Object Definition. Notice the **Associations** area at the bottom of Figure 7.11.

Modifying MDF Object Definitions

Instructions on how to edit and modify MDF Foundation Objects can be found in Chapter 5.

MDF Picklists

An important distinction must be made between Picklists and MDF Picklists. MDF objects read from MDF Picklists and not the traditional Picklist listing. To create a new MDF Picklist, go to **Configure Object Definitions** and choose **Create a New Picklist**.

Propagation Data Model

Propagations are defined within an XML data model known as the Propagations Data Model. Propagations help you to default in data values on the employee data side based on the properties of a selected Foundation Object.

There are two key parts to defining a propagation scenario:

- Propagation statement
- Mapping statement

A *propagation statement* identifies the triggering Foundation Object, the referential Foundation Object field, and the destination employee data field. Figure 7.12 shows an example Propagation Data Model statement in which the selection of a job in the employee data record triggers a lookup of the Job Foundation Object and returns the assigned Pay Grade to the Pay Grade field on the Employee Record.

```
<propagate foundation-element-id="jobCode">
  <field id="grade">
    <destination hris-element-id="jobInfo" field-id="pay-grade"/>
  </field>
</propagate>
```

Figure 7.12 Propagation Data Model

A mapping statement identifies the lookup key between the Foundation Object code/ID and the triggering employee data field. This statement permits the lookup on the Foundation Object side. Figure 7.13 shows an example.

```
<propagation-mapping foundation-field="jobCode.externalCode" hris-field="jobInfo.job-code" />
```

Figure 7.13 Propagation Data Model Mapping

MDF Foundation Objects Referencing Country and Currency

MDF Foundation Objects do not reference Picklists for *Country* and *Currency* assignments but rather *Generic Objects* called Country and Currency. These generic objects contain properties and characteristics which then extend to the referencing Foundation Object—usually Company/Legal Entity. One benefit of using objects for this assignment is that customers can inactivate values that are not needed in order to cut down on the selection list.

In the case of the **Country** object (Figure 7.14), characteristics include:

- Country code (alpha)
- Country code (numeric)
- Currency
- Country-specific Pay Components
- Country-specific Event Reasons

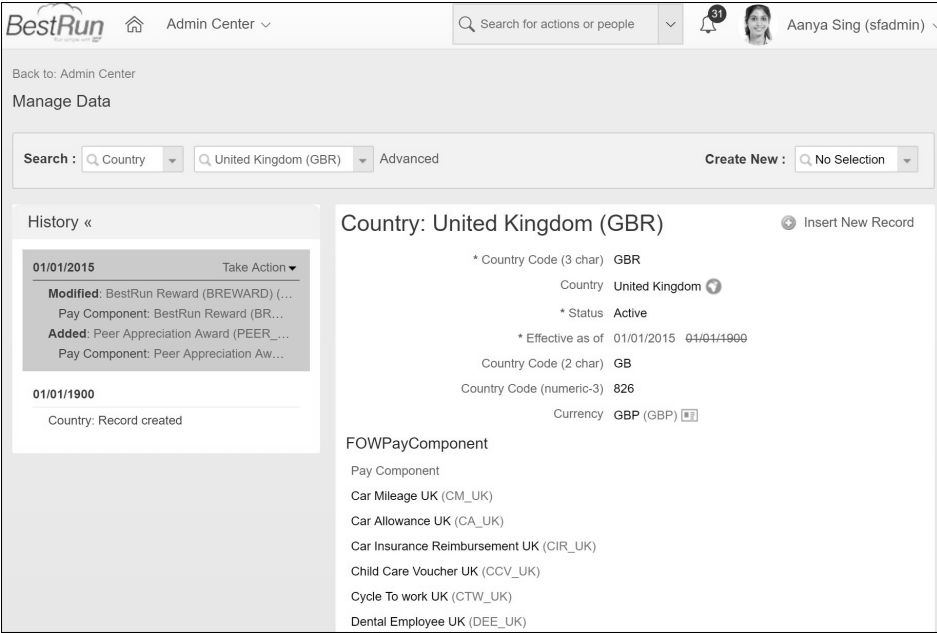


Figure 7.14 Sample Country Entry Showing Characteristics

For **Currency**, characteristics include:

- Currency code
- Default decimals (places)
- Symbol

Additional values can be added to the standard delivered listing loaded during implementation (found on *help.sap.com/hr_ec*). Values that are not needed can be made inactive. Additional fields can be added to the object definitions set in **Configure Object Definitions**, covered in Chapter 5.

7.5 Creating Foundation Object Data

There are two methods used when creating *Foundation Object data*: importing templates and manual creation within the system. Each administrator will likely develop a preferred method. We recommend using the import templates for initial populations to save time and effort. Ongoing maintenance can be accomplished using either method, but it’s often easier for small changes or additions to be made in a manual or direct fashion. We will walk through both methods in this section.

7.5.1 Importing Templates

The process for creating Foundation Objects in Employee Central using load templates is an excellent way to add multiple entries at one time. Each Foundation Object has its own load template. Templates are generated by the system and are specific to your configuration. Load templates can also be used to purge or overwrite existing entries in the system or to make mass updates, as may be needed for Company Reorganization Exercises (ReOrgs).

Load templates are accessed in Admin Center. They can be found using the following path: **Admin Center • Employee Files • Import Foundation Data**. At the top of the **Import** screen, you can download a blank but properly formatted Foundation Object-specific template by clicking on the **Download a blank CSV template** link (see Figure 7.15). You will see a dropdown list of all relevant Foundation Objects and can choose the one you want to use.



Figure 7.15 Import Foundation Data Screen

Load Template

Each load template is a comma-separated values (CSV) file containing two header rows, as shown in Figure 7.16. The first header row contains the technical name of each HRIS field, and the second row contains the field’s label. It is important to keep the file in CSV format and to leave the header rows untouched.

	A	B	C	D	E	F
1	start-date	externalCode	name	description	status	Division.externalCode
2	Effective as of	Code	Name	Description	Status	Division

Figure 7.16 Simplified Load Template with Two Header Rows

Almost all load templates will contain columns for externalCode, start-date, name, and status (see Figure 7.16). A Foundation Object joined to another by association will also have a column to enter in the associated object’s external code (Column F of Figure 7.16).

When populating a template with data, keep the following helpful tips in mind:

- Each object’s external code must be unique.
- The start date value will determine the date on which each object can be assigned to an employee. Be sure to date it back far enough to be used on employee records.
- Choices for **Status** are **Active** or **Inactive**.
- When referring to a Picklist value, use the Picklist label or direct value, not its external code.
- When referring to other Foundation Objects, use the object’s code, not its name or label.

Recommendation

Do not delay the data-gathering process for Foundation Objects. Spend time identifying all of the objects needed to support your organization’s business, but try to avoid waiting until the last minute to do so. Foundation Object data must be imported prior to importing any employee data, so it is best to do so in a timely manner in alignment with your project plan.

Importing the Load Template

Once you finish populating a load template with your entries, import it into the system. To do so, return to **Admin Center • Employee Files • Import Foundation Data**. This time, instead of downloading a blank template, scroll down to the bottom portion of the **Import Foundation Data** screen (see Figure 7.17).

Follow these steps to import a file:

1. Select the type of Foundation Object you want to import from the radio button list.
2. Choose whether you’re performing a **Full Purge** (overwrite objects existing on the file with the new data contained in the file) or an **Incremental Load** (adds these values as new records in an object’s history).
3. Select the file for import.
4. Choose the corresponding file format. If there is any doubt about which format to use, choose **Unicode (UTF-8)** so as not to lose any multi-character set formatting.
5. Click the **Validate Import File Data** button. The system then reviews a subset of the file to ensure that the proper header rows have been used and that appropriate field values have been selected.
6. Once the file passes validation, go back through and click the **Import** button to complete the load process.
7. Depending on the size of your file, it may be loaded directly and a results message displayed right on the screen. With larger files, the import job may process in the background and an email message will be sent to confirm the import. You can also actively monitor the import job’s progress by clicking on the **Monitor Job** button at the top-left side of the screen or by selecting **Monitor Job** from Admin Center.

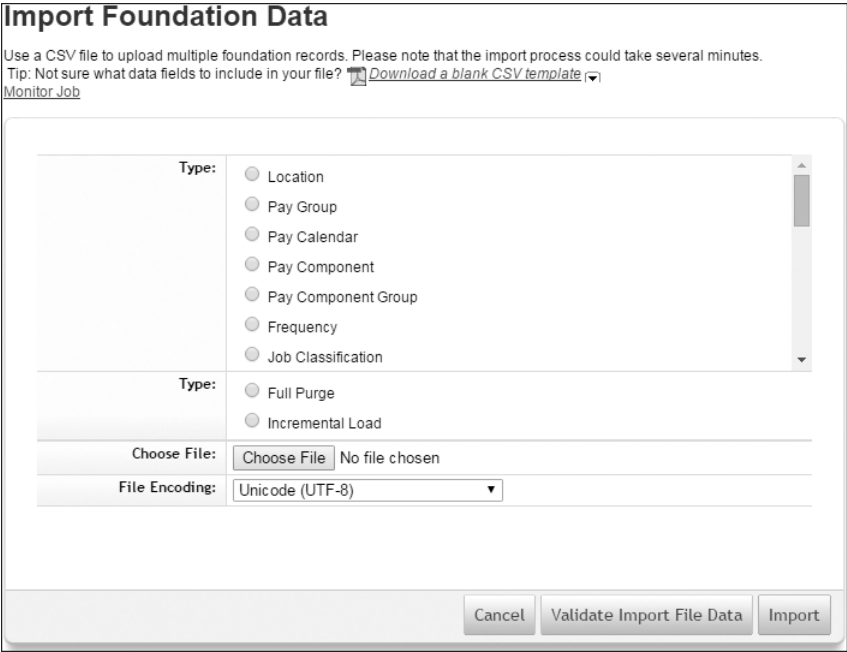


Figure 7.17 Import Foundation Data Screen with Key Areas Highlighted

Note

At the time of writing (December 2015), all Foundation Objects, even MDF Foundation Objects, can be loaded via template in this manner and from this screen. In addition, MDF Foundation Objects can also be loaded into the system using the **Import and Export Data** portion of the Admin Center. This process can be a little more involved, however.

7.5.2 Manual Creation

Manual additions to the Foundation Data and regular updates also can be made manually within the system. This is a task usually carried out by global administrators, because Foundation Objects are for the most part global in nature. Manual admin updates is a method preferred by many to update Locations, add a new Division or Cost Center, or update the Job Classification listing. The location within the Admin Center for making changes varies slightly based on whether you’re modifying a regular Foundation Object or an MDF Foundation Object. Let’s take a look at each scenario.

Managing Traditional Foundation Object Data

Manually add and edit non-MDF Foundation Objects in an area of the Admin Center known as **Manage Organization, Pay and Job Structures**. Navigate to this area via **Admin Center • Employee Files • Manage Organization, Pay and Job Structures**. The resulting screen allows you to search for existing Foundation Data in order to view, edit, update, and delete entries and to create new values (Figure 7.18).

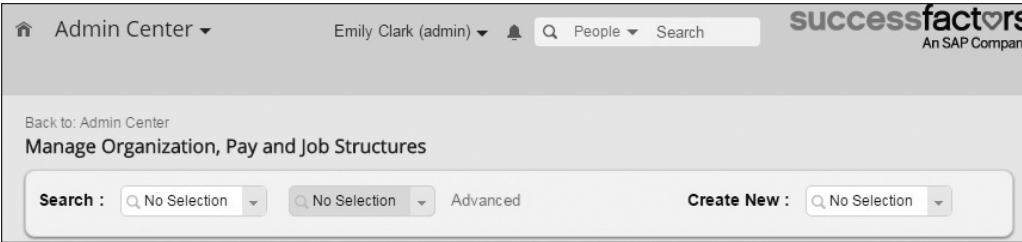


Figure 7.18 Manage Organization, Pay and Job Structures Area

Creating a New Entry

To create a new entry, select the Foundation Object type from the dropdown list next to the **Create New** header, shown in Figure 7.18. A blank entry screen for that Foundation Object will appear and will show each field that is defined as an HRIS field for this particular HRIS element. Complete the entries and click **Save** at the bottom of the screen (see Figure 7.19).

Pay Component

* Effective as of

09/01/2015

* Required Fields

Blue indicates that the item changed on this date

* Pay Component ID

Click or focus to edit

Name

Click or focus to edit

Description

* Status

No Selection

* Pay Component Type

No Selection

Is Earning

No

Currency

No Selection

Figure 7.19 Blank Foundation Object Screen for a Pay Component Object

Effective As Of Date

Pay particular attention to the **Effective as of** date at the top of the entry. This represents the entry’s start date. It must be set back far enough that the object is in existence for an employee record it needs to be added to. If an employee needs to be assigned a Pay Component as of July 1, 2000, then the Pay Component start date must be on or before this date. This is a common oversight new administrators sometimes make when creating new entries.

Modifying an Existing Entry

To modify an existing entry, select the Foundation Object type from the dropdown list next to the **Search** header, shown in Figure 7.19. From the second dropdown, select the specific entry you wish to view or edit. You can type in the name or code of this entry. Once selected, the entry should display in the center of the screen, as shown in Figure 7.20. Notice that because this is an effective-dated entity, there is an object history on the left side of the screen. This allows you to track changes over time.

Back to: Admin Center

Manage Organization, Pay and Job Structures

Search :

Location

Beijing (CN_BJS)

Advanced

History

01/01/1990

Location: Record created

Take Action

Location: Beijing (CN_BJS)

Effective as of

01/01/1990

Blue indicates that the item changed on this date

Code

CN_BJS

Standard Hours

40

Name

Beijing

Description

Beijing, China

Status

Active

Location Group

APAC (APAC)

Timezone

Asia/Hong_Kong (GMT+08:00)

Geo Zone

Asia Pacific (APAC)

Legal Entity

Ace China (ACE_)

Figure 7.20 Left Side of Existing Location Entry, Ready for Viewing/Editing

If you need to make a correction to the data shown, click on the **Take Action** drop-down shown in the **History** section. Then, select **Make Correction** or **Permanently**

275

delete record (see Figure 7.22). A correction should only be made if data is erroneous and needs to be fixed as of the already shown effective date (or if an effective date needs to be corrected).

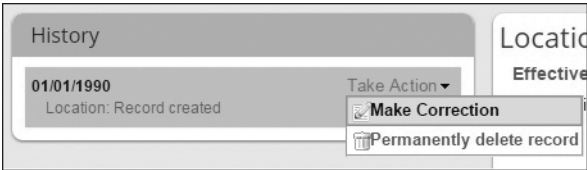


Figure 7.21 Take Action Options: Make Correction or Permanently Delete Record

An update to existing data is needed if there has been a change to the existing record. This happens in the case of a new Department name, a new Division head, a new Location address, and so on. In these cases, you do not want to overwrite existing data but rather want to keep it in **History** while you make a new entry in the record. Accomplish this by clicking the **Insert New Record** button in the top-right corner of the screen (see Figure 7.22). This allows you to add a new record without erasing previous information.

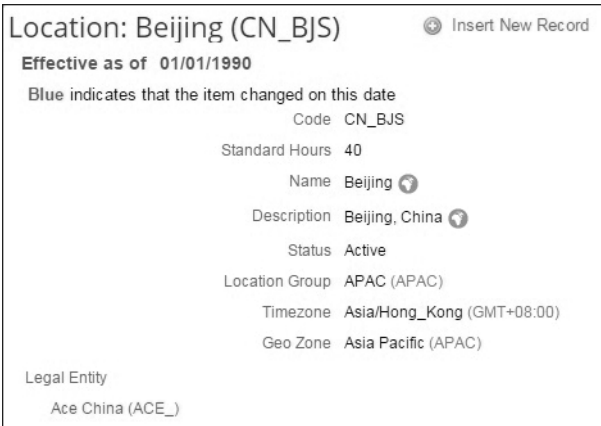


Figure 7.22 Location Record Showing Insert New Record Button

Managing MDF Foundation Object Data

The general process for creating and modifying an MDF Foundation Object Data entry is similar to the non-MDF Foundation Object process, but the area of the system for accessing this data is different.

From the **Manage Organization, Pay and Job Structure** screen, choose to create or edit an MDF Foundation Object entry. When you do so, you are notified via a popup that the location for performing these tasks has changed. Click on the **MDF Foundation Objects** link (Figure 7.23) to be rerouted to the new location. Once there, the process of adding or editing an MDF Foundation Object entry is the same as the process for adding and editing non-MDF Foundation Objects described in the previous section.



Figure 7.23 Popup Alert Rerouting to the Manage Data Area

Alternately, directly access the area for adding and editing MDF Foundation Object Data, the **Manage Data** area, from the Admin Center, via **Admin Center • Employee Files • Manage Data**. As you can see in Figure 7.24, the view and menu options are identical to what you saw in the **Manage Organization, Pay and Job Structures** area.

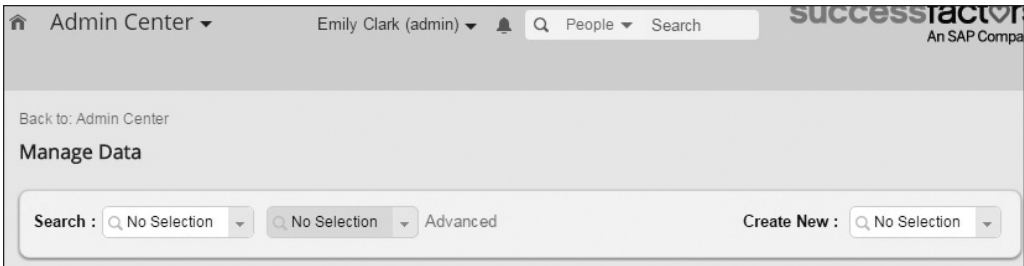


Figure 7.24 Manage Data Area of the Admin Center

7.6 Extending Foundation Objects

With the addition of the MDF to Employee Central, there are now several different options in terms of flexibility and customer-specific configuration. These options are seen directly with the use of Foundation Objects. Traditional data models are defined independently, but the MDF allows for universal consistency and reuse of existing

Object Definitions. It also allows you to build your own custom objects (foundation or otherwise) and to insert and connect them to already existing structures as needed.

The greatest benefit of the MDF for Foundation Objects is the ability to create new and custom Foundation Objects for customers. This means that if the basic existing four-level organizational structure (Company, Business Unit, Division, Department) doesn't meet the needs of an organization, you can build new objects to help augment the existing structure. For example, you might add a SubFunction or Project Team object.

You can also build non-organizational-related Foundation Objects to assist companies with managing their employee data or characterizing their organization and employees. Items such as Buildings (to further breakout campus- or plant-style Locations) and Job Market Category are common examples.

These custom MDF objects can be used in the same manner as their traditional counterparts. They can be inserted into an existing structure using associations, used as filters when sorting through long data lists, and brought into parent-child relationships. In addition, they provide some extra functionality in the form of using business rules and workflows during their creation and use processes. For more information on the MDF, see Chapter 5.

7.7 Summary

In this chapter, you learned about Foundation Objects and their role in the Employee Central module. We introduced propagation and associations as well as the Foundation Object creation and maintenance processes. We ended the chapter by looking at how we can extend Foundation Objects further.

In the next chapter, we will take a deep dive into data imports and data migration. These two topics are important to master not only for initial system population, but also to assist with ongoing maintenance.

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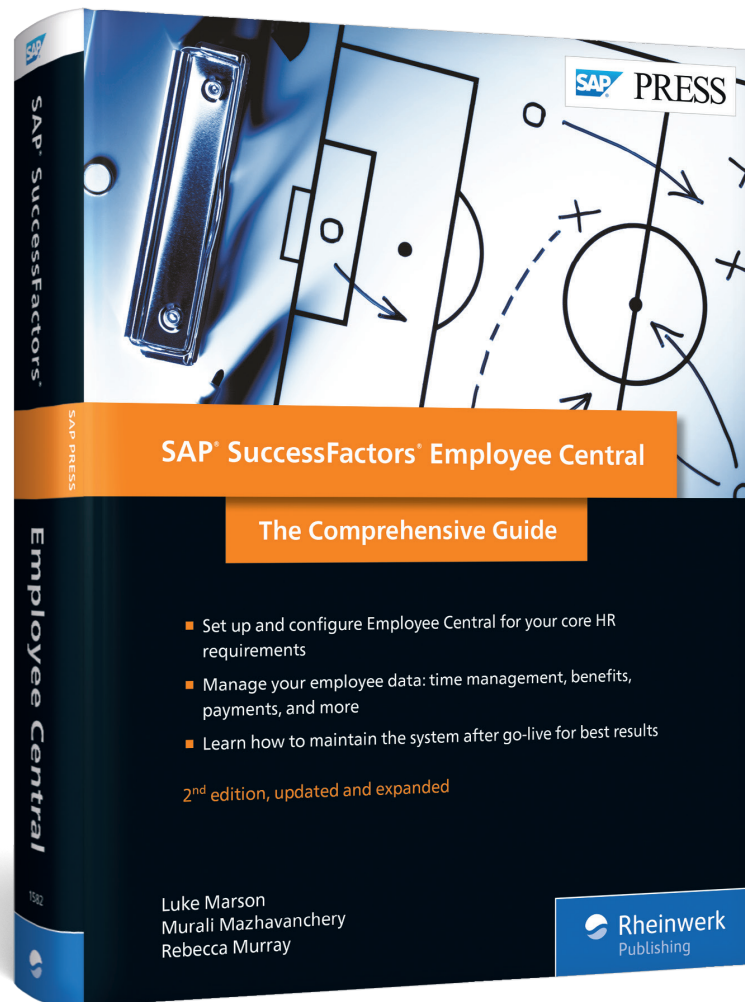
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