Employee Central: Processing Mass Transactions
**Employee Central: Processing Mass Transactions**

**Objective**

SAP SuccessFactors provides multiple tools to process mass changes including the mass changes tool, employee data imports, and MDF object imports. This document showcases various scenarios that need mass changes and which tools can be best used for those.

**Audience**

SAP SuccessFactors Customers: IT and HR professionals;

SAP SuccessFactors Implementation Partners: Consultants, solution architects and project managers

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**Change Log**

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**Supported Releases**

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**Contribution**

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<td>SAP SuccessFactors Product Management</td>
<td>SAP SE</td>
</tr>
<tr>
<td>Author</td>
<td>Eva Montagne</td>
<td>Veritas Prime</td>
</tr>
<tr>
<td>Author</td>
<td>Monica Naranjo</td>
<td>Veritas Prime</td>
</tr>
<tr>
<td>Contributor</td>
<td>Mary Nylen</td>
<td>Veritas Prime</td>
</tr>
<tr>
<td>Contributor</td>
<td>Jonathon Luplow</td>
<td>Veritas Prime</td>
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The recommendations in this document are based on the functionality available up to SAP SuccessFactors release mentioned above. Future functionality can impact the recommendations provided by this document. We strive to keep these recommendations up-to-date, however, in case you find that recent new functionality has not yet been considered in the latest version of this document, please reach out to your Customer Success Manager / Partner Delivery Manager or send an email to SAPSuccessFactorsIDPDoc@sap.com.

Implementation Design Principles (IDPs) for SuccessFactors solutions are delivered by SAP for helping customers and partners on how to choose the most appropriate strategy and solution architecture for SuccessFactors implementations. IDPs are compiled taking into consideration the experience of many implementation projects and addressing frequent business requirements as well as real-life implementation challenges. They are continuously reviewed and updated as product functionality evolves. In addition, the reader is advised to read and familiarize with essential and additional product-related documentation which includes Implementation Guides, SAP Notes, SAP Knowledge Base Articles, and additional assets as referenced in this document, see chapter 8.
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1. TERMINOLOGY

The following table explains some abbreviations used in this document.

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<thead>
<tr>
<th>Abbreviation</th>
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<tr>
<td>EC</td>
<td>Employee Central</td>
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<tr>
<td>ERP</td>
<td>SAP Enterprise Resource Planning often referred in the document pertains to SAP HCM on-premise system</td>
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<td>MDF</td>
<td>Meta Data Framework</td>
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<td>Implementation Design Principle</td>
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2. ABSTRACT

Processing mass changes for a population of employees can be a complex and challenging task. SuccessFactors provides multiple tools to process mass changes including the mass changes tool, employee data imports, and MDF object imports. This document showcases various scenarios that need mass changes and which tools can be best used for those.

Examples of common mass changes that will be discussed in this document are organizational structure changes such as transferring employees to a new location, updating pay structure like pay range, and employee status changes like mass terminations, seasonal layoffs, and holiday calendar updates.

3. INTRODUCTION

For customers both large and small, mass transactions are a necessity. These mass transactions have a range of origins and therefore can become a complex topic in the SuccessFactors system. Several challenges arise in the process such as choosing the correct tool to make the change, ensuring the change is executed in all aspects of the system, and being certain that all employees part of this change are updated accurately. Even outside of the SuccessFactors system, mass transactions can be challenging for a business to perform – understanding the nature of the change and the downstream impacts it may present to other parts of the organization. There are three different ways to make mass changes in SuccessFactors Employee Central and this document assists in providing clarity on which tool to use and when.

4. BUSINESS REQUIREMENT

4.1. Functional Requirements

To understand the important impacts of mass changes, it is worth reviewing the basic types of mass transactions a business may face. These mass transactions can be categorized as follows:

- Transactions centralized around employees
- Transactions centralized around organizational units

These two types of changes may sound basic – the first is when employee information needs to be changed (manager transfer, seasonal layoff) and the latter is when the organizational structure is changing (changing the hierarchy of a division, splitting a department into two). However, there are also common cases where these changes affect each other. For example, an HR Admin can decide to make a mass location change to a population of employees – but what does that mean for the organization? Does this change need to be reflected in the positions of said employees? Are these employees simply moving locations or did the location close therefore also needing an organizational structure change?
This document will discuss all the exceptions to look out for in multiple mass transaction scenarios. In summary, the requirements covered in this document are mass changes due to the following company actions:

1. Mass Terminations
2. Closing a location and transferring all employees to a new one
3. Foundation object label change
4. Completing a mass pay change due to industry standards
5. Dividing a department into two separate departments
6. Updating association between department and division
7. Updating pay ranges
8. Holiday calendar update
9. Performing a mass seasonal layoff/leave of absence
10. Changing Job Relationships like HR Managers and Matrix Managers

4.2. Technical Requirements

The following technical requirements will cover some of the functional pieces that need to be considered while making mass changes in specific scenarios.

- The method of making the mass change (There are multiple tools to change mass amounts of information at once – which one works best for which scenarios)
- Position Management (How will these changes affect the associated position? Are there job-position sync rules reflect the changes? Is the position hierarchy adaptation in line with the changes?)
- Sequencing (Many times, manual imports may not propagate information retroactively. How does an HR Admin know when this will happen and how to validate this? If it happens, what is the best way to fix it?)
- Role-Based Permissions are configured properly for imports, manage mass changes tool and manage mass changes for metadata objects tool and business rules.
- Thorough knowledge of imports into the specific system:
  - Validation is performed by the system when an import is done and can be checked in Monitor Jobs. It is important to validate any errors before importing. It will ensure a smoother process as it would eliminate the chance of importing incorrect data and is also quicker to analyze a validation than an import to solve errors

Business rules: With the introduction of the rule context, it is possible to specify which rules will trigger an import and which will not – depending on the situation the rule context is set accordingly. The number of business rules that are called directly impacts the performance. Make sure that only the essential rules are marked to be executed during imports. Note that only “onSave” rules will trigger but “onPostSave” rules are not triggered (KBA).

5. SOLUTION OVERVIEW AND CONCEPTS

Although there are four different ways to perform a mass change for the use cases in this IDP, regardless of which is used, certain measures need to be taken according to the system set up before going forward. Our solution design approach was highly impacted by the following:

5.1. Conceptual Prerequisites to Making Mass Changes

The Different Tools that can be used to Manage Mass Transactions:

There are three different tools that can be used to make mass changes in Employee Central. Figure 1 below summarizes these tools and when to use each. This diagram is a simple way to decide how to go about making
the changes in the following use cases. Please note that certain tools can be used interchangeably in some of the use cases but the IDP focuses on the most appropriate for each use case.

Figure 1: Managing Mass Transactions Tools Diagram

This diagram serves as a guide to choosing which Mass Change Tool is most appropriate for the mass change situation. Each section names each tool the way it is found in the system provides a short description of when to use it and includes an example. The sections in between depict similarities between the tools – these similarities can serve as the next tool to try if the first tool is chosen results in error. To summarize the figure:

- **Manage Mass Changes**: This tool is used to make mass changes on employee data that have the same current value and the same future value. This feature is used inside the system the entire time.

- **Import Employee Data**: This tool is used to make mass changes on employee data when the current or future values might not be the same for all employees in a population. This method is used both inside the system as well as outside of the system as changes are made via the .csv file.

- **Import and Export Data**: This tool is similar to the Import Employee Data feature regarding what current and future values look like as well as the process occurring both inside and outside of the system in a .csv file. The biggest difference is that this tool is used for MDF object data.
  - There is also a tool called "Import Foundation Data" that acts in the exact same fashion, only with Foundation objects rather than MDF.

- **Manage Mass Changes for Metadata Objects**: This tool is very similar to the Manage Mass Changes tool for employee data wherein it is used or MDF object transactions and it is performed entirely in the system. The difference is that the tool can only be used when current and future values are the same among all affected data.
5.2. System Prerequisites and Basic Settings before Making Mass Changes

Job Information - Foundation Objects are stored on the Position Object:

It is important to ensure that the affected users' position and Job Information are aligned. Job Information tends to be more employee-specific – if two different employees share the same position and some fields on their respective Job Information data are inconsistent, which values are synced to the position? Therefore in most cases; the Position object will be the leading object for mass transactions. This means that any changes made to fields on the position object that are also on the Job Information object will have the Job Information fields updated with the position object import. In this case, ensure that the Position to Job Sync Rule is set up in the Synchronization tab of Position Management Settings.

In some select cases, users want the position information to sync from Job Information changes. An example of this may be a Location change or if Job Information has been maintained without some sort of position sync. Ensuring the correct set up of the Job to Position Sync while importing can also be done in Position Management Settings:

1. In Position Management Settings > Import > Execute Reclassification or Transfer During Job Information Import section make sure the "Execute Reclassification or Transfer" option is set to "Yes" and the "Event Reason for Position Assignment Change" option is set to the desired Event Reason that will trigger the Job Information to Position sync.

2. In the event reason for this make sure that you set the follow-up-activity flag (id="implicit-position-action")

3. In the import file, make sure the Event Reason included is the one selected for the Job Information to Position Sync import in Position Management Settings

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</table>
4. The positions associated with these users will have a newly updated record with this Job Information date. It would create a new position if the setting for multiple incumbents is enabled.
Employee Central Import Settings

Always check these settings in RBP for the user before importing employee data. This will ensure the following:

- Workflows are not accidentally kicked off
- Business Rules in the data model do not override any manual inputs in the import file
- Business Rules populate the correct information that was not included in the import file
6. DETAILED SOLUTION

6.1. Mass Terminations

The first use case in this document is an example of how to perform Mass Terminations. Mass Terminations are best performed via import as unlike the Mass Changes tool, not all direct reports, etc. will be handled the same way. By using imports, it is also easier to ensure that all business rules that should trigger are triggered and that any workflows that could potentially be skipped are indeed skipped. Additionally, there is a Termination Details import specifically for this mass transaction.

Reminders and Tips:

- If Position Management is enabled, be aware of any downstream impacts on terminations of managers with direct reports. All direct reports will need a new manager. This can be handled in Position Management Settings (Hierarchy adaptation) or via employee imports before the termination details import.
  - If positions need to be made inactive after the termination. Position import has to be done after the employee import
- Make sure to select the Attachment field while downloading the Termination Details template to minimize the possibility of errors.
- Any required fields need to be filled out in the import template or else there will be errors returned when validating. If data is not known for one of these fields, either make the fields not required or escalate to someone in the organization who will know the information.

Recommended Process:

1. After identifying the employees to be terminated, download the Termination Details template from Import Employee Data.

2. Fill out the import file with the appropriate dates and User IDs of employees. Then Validate and Import this file.
3. Validate, review and correct any errors in Monitor Job, then Import the template.

4. Verify the terminations imported into the system properly.
6.2. Closing a location and transferring all employees to a New Location

The second use case reviewed in this document depicts a scenario where a location is closing, and all employees are being transferred to a new location. In this example, all employees are being transferred to the same new location. The location currently in use is the London Office (London_Office) and the new location will be New London Office (New_London_Office).

Reminders and Tips:

- “Location” is a Foundation Object and therefore data cannot be exported and needs to be run via report. Additionally, the import will be using the Foundation Import tool.
- Be aware of whether this change will be happening on both Job Information and Position
- Do not delete any objects that are currently in use by employees
- Choose a date that makes sense for the Start Date of the Location (the migration/Date of move, etc.)

Job Information Import:

1. Run a report to see which employees are currently using the London Office location value.

2. Go to Manage Organization, Pay, and Job Structures > Location and search the London Office.

3. Choose the date this Location will become Inactive in the system. Insert a new record with this effective date.
4. Validate and Import the template using Import Foundation Objects and choosing the Location object to upload the new location. This can also be created in the user interface.

5. Prepare the Job import file with the users that are affected by this Location change. The Event Date should be on or after the effective start date of the new location the new users will be transferring to. Validate and import the file.

6. Run the report again to make sure the affected employees show the correct location information.

Recommended Process when position management is in scope (Mass Changes for MDF):

1. Follow steps 1-3 from above Job Information Import recommended process.

2. Navigate to Manage Mass Changes for Metadata Objects and fill out the required information. It is important that “Synchronize to Incumbents” is set to “Yes” because this is what will sync the new Location back to the employees. (Location has to be included in the sync rule in Position
3. Select the “+” sign next to “Select and Update Rule”. In the scenario list select “Update Rule for Mass Change Run”. Enter rule name and ID information.
4. Create a rule that defines the specific target criteria needed to update the object.

5. Select the newly created rule, select “Simulate” as the “Execution Mode”, and press Save. The simulate option will provide the results of the Mass Change as if it were to run for real. This helps to ensure all appropriate records are getting updated. If all looks fine, run the Mass Change again with the “Run” “Execution Mode”

6. After the Mass Change has successfully Ran, validate the changes in the system.
The next significant use case is a foundation object label change – in this scenario, it will be a Pay Grade label change.

Reminders and Tips:
- If multiple language packs are enabled, translations will also need to be updated.
- The reason to change this value can help determine a date to use for the updates (fixing a spelling mistake vs. corporate structure change – a spelling mistake should be made on the record where the mistake was made whereas a corporate structure change should reflect the date that the object name was changed in the organization.)
- Be wary any future effective date used in the import as it will add a record to the object.

Recommended Process:
1. Run a Foundation Object report on Pay Grade to get all the Pay Grade values in one file.
2. Go to Import Foundation Data and download a blank template for Pay Grade. Use the data from the Pay Grade report to fill out this template. Validate, fix any errors in Monitor Job, then import the template back into the system.

3. After importing, notice that the names of the Pay Grades were updated but not the translations.
4. Go to Import and Export Data and export the FO Translation object. Download the new file from Monitor Jobs.

5. Open a new excel file, make the necessary translation updates, and import this back into the system through Import and Export Data.

6. Check to see the translations and labels are now updated.

6.4. Completing a Mass Pay Change Due to Industry Standards

This use case covers making a mass pay change to a group of employees. This can be used in a scenario where pay needs to change due to a change in industry standards.

Reminders and Tips:

- Some pay data lives in the Compensation Information portlet (Target Bonus, etc.) but any salary data lives in Pay Component Recurring which is a separate import.
• If Pay Component Recurring is the only portlet that needs an update the Compensation Information template will still have to be imported to capture Event Date and Event Reason.

Recommended Process:

1. Run a report to get full Compensation Information data for the employees needing updates.

2. Go to “Import Employee Data” and download the Compensation Information template. (If Compensation Information is staying the same and the only change is the Pay Rate, only User ID, Event Date, Event Reason data fields are needed.)

3. Prepare the import file with the necessary data changes for each employee.
4. In “Import Employee Data”, Validate then Import the file.

5. Verify the changes have been made in the system. (If only the Compensation Information portlet needs to be imported, this will be the last step. If the Pay Component Recurring portlet also needs to be updated, continue.)

6. From “Import Employee Data” download the Pay Component Recurring template and fill it out with the necessary information. Be sure to match the Event Date with the Event Date from the Compensation Information import.
6.5. Department is divided into two separate departments

This use case covers Department updates for a batch of employees – particularly, splitting one department into two.

Reminders and Tips:

- Keep in mind the associations that these Departments should have
- Decide what Effective Dates need to be used to properly track history

Process (without Position Management):

1. Run a report to get Job Information data for the employees that will be affected by this Department split.
2. From Manage Data, find the Department in the system and Insert a New Record with the Start Date set as when this Department will become one of two.
3. Create the new Department with all the necessary information (Associations, Head of Department, Parent Department if applicable).

4. Identify the employees that will need their Job Information updated to the new Department.
5. From Import Employee Data download the Job History template (if Department is the only value being updated, that can be the only value selected in the import template along with any other required fields like Event Date, Sequence Number, User ID, and Event Reason.)

6. Enter information of the impacted employees in the import file.

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7. Validate and Import this file via the Import Employee Data.
8. Verify this information in the system.

Recommended Process (with Position Management):

1. Run a report to get Job Information/Position data for the employees that will be affected by this Department split.

2. Identify the Positions of the employees that need their Departments updated.
3. Navigate to Import and Export Data and export the Position object to extract Position data for the desired employees.

4. For the desired employees, update all necessary information (Department object, Start Date, etc).

5. Add the “technicalParameters” column to the end of the import file and populate it with “SYNC”. (Position to Job Sync on Position Import is currently not supported through APIs. A possible workaround for this would be to enable the “technicalParameters” field on the Position object in Configure Object Definitions and have the API use the “technicalParameters” field to run.)
6. Import the Position file back into Import and Export Data. After the job is successful, verify the updated information in the system.

6.6. Updating Association Between Department and Division (Without position management)

This use case will describe how to update affected employees’ Job Information after a Department has moved to another division.

Reminders and Tips:
- Department to Division associations and associations for other Org Structure fields will need to be assessed after these updates.
- Effective dates should reflect the organizational changes to this association.

Recommended Process:
1. Run a report to get Job Information data to find the employees that will be affected by these association updates.
2. Navigate to Import and Export Data to export all the Department to Division data.

3. From Monitor Jobs, download the export file (use this to assess all Department-Division associations in the system.)

4. Identify the Department to Division associations that need to be updated (ex. Market Research (5000131) and Production (5000133) Departments.)
5. From Manage Data, Insert New Record and update the Departments with the new association.

6. Review the new Division value in the Department to Division association to confirm if the association from Division to Business Unit will affect any existing employees’ Job Information (this will affect all employees, not just the selection.)
7. From Import Employee Data download the Job History template (if Division is the only value being updated, that can be the only value selected in the import template along with any other required fields like Event Date, Sequence Number, User ID, and Event Reason.)

8. Enter information of the affected employees in the import file.
9. Validate and Import this file via the Import Employee Data tool.

10. Verify this information imported into the system correctly.

6.7. Updating Pay Ranges

This use case will describe how to use Reports and the Import Foundation Data tool to update the values in Pay Ranges.

Reminders and Tips:

- Pay Range is a Foundation Object so this data cannot be exported from the system and will have to be done via Reporting.
- If there are label change being made, these will have to be updated through the FO Translation object.

Recommended Process:

1. To accurately update the Pay Range data in the system, it is necessary to view the data that is already in the system. To do this, go to Report Center and create a new Foundation Object Table report for the Pay Range Foundation Object.
2. Extract the desired selection from the report.

3. Navigate to Import Foundation Data and download a blank CSV template for Pay Range.

4. Fill out the import with the desired updates for the selected Pay Ranges.

5. From Import Foundation Data, select Pay Range, the import type (Full Purge/Incremental) and then choose the Pay Range import file. Validate and Import the file.
6. Verify in the system that the Pay Ranges have been updated.

6.8. Holiday Calendar Update

This use case demonstrates a mass change for updating a group of employees’ Holiday Calendar all to a different Holiday Calendar using the Manage Mass Changes tool.

Reminders and Tips:

- When using the Mass Change tool, the updates will only go through for employees that have clean data (associations, filters). This is a scenario where the need to ensure all bad data is corrected before starting the mass change is very important.

Recommended Process:

1. Navigate to Manage Mass Changes and click Create New.

2. Fill out a name and effective date for this change and identify a group of employees by clicking create.
3. Create a group to specify the employees that need the update.

4. After creating a group, select the Holiday Calendar field and the new value the employees will have. Also, select the Event Reason that will be used for this update.

5. Click Save and Initiate to start the Mass Change job.

6. Once completed, verify the updated information by navigating to the profile of a user that was included in the change group.
6.9. Performing a Mass Seasonal Layoff/Leave of Absence

Seasonal employees will be set as taking leave for a certain amount of time. This can be done with a mass import for the Employee Time object.

Reminders and Tips:

- If the client has full Time Off enabled, ensure that the Time Type in the Employee Time import file has a Leave of Absence Event Reason tied to it or this imported record will become part of full Time Off instead of only Time Off for Leave of Absence.
- Some organizations use a termination for this scenario rather than a Leave of Absence. If this is the case, follow the steps for the mass termination process but be aware that a rehire will have to be performed for the employee when they return.
- Job Information Import with full purge will not work for Employees that are on Leave of Absence. The right approach is to use the incremental load while importing data. There is also a guard rail that prevents Job info data from being uploaded with the event reason related to the Leave of absence event during the Leave of absence hence an event reason related to non-Leave of absence must be used. If the customer is using event derivation, make sure that the right even reason is being derived for the leave of absence case during the job info import.

Recommended Process:

1. Run a report to get Job Information data for the employees that will be going on leave.
2. Navigate to “Import and Export Data” and download the Employee Time template.
3. Fill out the template with the necessary information (User ID, Time Type External Code, Start Date, End Date, Approval Status, Quantity in Hours, Editable, LOA Expected Return Date.)
4. Validate and Import this file back into “Import and Export Data”. Verify that the user’s job information is updated.
6.10. Changing Job Relationships like HR Managers and Matrix Managers without position management.

Many times, an organization will update HR Manager or Matrix Manager relationships. These relationships are in the Job Relationships portlet and therefore have a different change process. The last use case will discuss how to handle mass transactions for these types of changes.

Recommended Process:

1. Run a Job Relationships report to get the desired group of employees for these changes.

2. Find the desired group of employees in the report.

3. Navigate to the Manage Mass Changes tool and click Create New.
4. From this screen enter the name of this new Mass Change being created. Click Create next to Employee Group to specify the employees that should be receiving these updates.

5. Fill the Mass Change Area with the desired updates for this group of employees. Press Save and initiate the change later or press Save and Initiate to initiate the change immediately.

6. From the Manage Mass Change tool select the newly create Job Relationships change.

7. On this page, details are shown for the Mass Change completed with the employees affected at the bottom.
8. **Verify these changes have been made in the system.**

6.11. **Changing Job Relationships like HR Managers and Matrix Managers with position management.**

Matrix relationships can be maintained at the position object. Job Relations are synced when the position matrix relationships of a position are changed, or if an employee is assigned to a position that has position matrix relationships and/or is referenced by position matrix relationships of other positions.

So a mass set of positions if there are changes related to matrix positions positions then it is recommended to change the relationship at the position object so that the job relationships are synced automatically. By default, the sync is always executed. You can switch it off globally in position management settings or for specific positions by using position types.

Note that when a position record with a position matrix relationship is deleted, the corresponding Job Relations aren’t removed from the Job Relations of the position incumbents. For more details on the matrix relationship at the position object please refer to the position management handbook.

**Recommended Process:**
1. Run a Job Relationships report to get the desired group of employees for these changes. Save the file. (This is more for verification of the data at a later point of time)
2. Make the list of positions for which the matrix relationships must be changed.
3. Navigate to the import/export data to download the file for Position-Matrix Relationship
4. Fill the csv file with data

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3001001</td>
<td>01.01.2020</td>
<td>custom ma</td>
<td>3001003</td>
</tr>
</tbody>
</table>

Import the file with changes. Please note the “Technical parameter” is not needed to be filled in the excel for the relationships to sync to Job Information.

5. Run a Job Relationships report and compare it with the one that was saved as part of step 1.

6. If there are some job relationships that need to be deleted, then for those employees download the Job relationship template (Import Employee Data->Job Relationship). Fill in the csv file with the relationships that needs to be deleted. In the column called “operation” fill “DELIMIT”. Then the file can be imported. Refer KBA.

7. ASSUMPTIONS AND EXCLUSIONS

All use cases that used an import file (whether in Import Employee Data, Import and Export Data, or Import Foundation Objects) all used the same validation, monitor job, import process. Any use cases that were centred around employee information changes and focused on making said changes via employee imports assumed that the system had job-pos sync rules that synced all changes back to the position object. All import changes also assumed a 01/01/1900 effective date for any records that required a date that would be early enough to capture all data changes. Additionally, all use cases assumed Employee Central Import Settings were set to ensure workflows would not trigger, business rules would not override imports but would ensure that any blank values in the import files that are to be filled via business rules would still fill.

8. REFERENCES

SAP Notes/KBAs
- 2092850 - How to make changes to Employee Data on mass via Import