SAP SuccessFactors

PUBLIC

Document Version: 1H 2025 – 2025-04-04

Managing User Information

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Content

1 User Information

In SAP SuccessFactors, user information consists of basic user information and extended user information. If you are managing users in Employee Central, there are even more user information elements. This administration guide is mainly focused on managing basic and extended user information for users that are not managed in Employee Central.

Basic user information is what you must provide for a user when adding the user to the system. It contains data like employee name, gender, address. Basic user information is required for functionality, reporting, administration tasks, and most importantly, permissions.

Extended user information consists of supplemental data about the user, and is classified into three types:

- Personal information
- Background information
- Trend information

Once the SAP SuccessFactors system is live, admins need to perform ongoing administrative and maintenance activities to keep it running smoothly. Among these activities, an essential one is user information management, which involves actions like adding users, managing user accounts, and updating user information. You can find information about most of the user management related tasks in this guide.

For details about managing Employee Central users, please see http://help.sap.com/hr_ec.

Related Information

Prerequisites for Managing User Information [page 30]
Getting Started with User Information Management [page 29]
Choosing a Tool for User Management [page 30]
Managing Basic User Data by Using the UI [page 54]
Managing Basic User Data by Using a Data File [page 98]
Extended User Information [page 138]

1.1 Different IDs in SAP SuccessFactors HCM suite

This table describes the IDs used in the SAP SuccessFactors HCM suite.

ID	Description	Can it be changed?	Can it be used for SSO?	Can it be used for integration?	Where is it displayed on People Profile?
PersonId	An identifier autogenerated by the system. It's used internally in the SAP SuccessFactors system.	No	No	Yes	NA
PersonIdExternal	A unique identifier of a person in Employee Central. You can define PersonIdExternal through a rule or enter it on the UI for new hires. Please note that PersonIdExternal is labeled as "person ID" in many places.	Yes	No	Yes	Biographical Information (Employee Central users only)
UUID (per-person-uuid)	This identifier is generated when person data is created in the system. UUID is introduced for integrating person data in Employee Central with other modules. UUID is stored at a database level only and isn't visible on the UI.	No	No	Yes	NA

ID	Description	Can it be changed?	Can it be used for SSO?	Can it be used for integration?	Where is it displayed on People Profile?
User ID (users-sys-id)	A unique identifier of user entity. A person might have one or more user IDs. If a customer maintains only one employment per person in SAP SuccessFactors, the user ID can serve as the person's unique identifier in the company. ⓘ Note The supported characters for users_sys_id are: A-Z, a-z, 0–9, -, _,. , @.	No	No	Yes	Live Profile User Information block in the legacy People Profile ⓘ Note Read Audit cannot be configured for this field. If it is displayed on the UI, data might be used in URL query strings.
Assignment ID (assignment-id-external)	Assignment ID is actually the "mutable user ID". It's visible to customers and can be used to identify users. A person might have one or more assignment IDs. If a customer maintains only one employment per person in SAP SuccessFactors, assignment ID can serve as the person's unique identifier in the company.	Yes	No	Yes	• Legacy People Profile: Live Profile User Information block • Latest People Profile: Employee Information card

ID	Description	Can it be changed?	Can it be used for SSO?	Can it be used for integration?	Where is it displayed on People Profile?
Assignment UUID	Assignment UUIDs are of 32 characters and using all uppercase letters. For example, FDF7921CD3C242F59963B30E8895D04A. Assignment UUIDs are "meaningless" and can be used in URLs and APIs without exposing personal identifiable information of employees.	No	No	Yes	NA
Username	Usernames are legacy identifiers for a person's employments. **Note** Usernames used to be used for logging into systems. However, this function is being deprecated soon.	Not recommended	No	No	While they are viewable in live profile user info, updating them isn't recommended.

ID	Description	Can it be changed?	Can it be used for SSO?	Can it be used for integration?	Where is it displayed on People Profile?
Login Name	A login name is unique to each person and is used to access the system. By default, the login name in an account matches the username from the person's first employment. For instance, if the username for a person's first user is "Cgrant," the default login name will also be "Cgrant," as the linked user. You can update the login name or the linked user's username using the *Manage Login Accounts* tool. Any changes you make will sync the two. Use the *Manage Login Accounts* admin tool to manage login names.	Yes	Yes	Yes	Displayed next to the person's display name on the Profile Preview and Full Profile of the latest People Profile.
Employment User Sys ID (emp-users-sys-id)	This field is filled with the users_sys_id of the employee on a global assignment when a host country/region address is created, so as to link the address to the employment. This field is never visible on the UI.	No	No	Yes	NA

ID	Description	Can it be changed?	Can it be used for SSO?	Can it be used for integration?	Where is it displayed on People Profile?
Previous Employee ID (prevEmployeeId)	This field shows the previous employee ID of an rehired employee. The new ID differs from the old ID, because the employee is considered as a new hire, even if the employee has worked for the same company before.	Yes	No	No	Employment Information (Employee Central users)
Payroll ID (payroll-id)	An identifier of the payroll that is used to compensate the employee.	Yes	No	Yes	Compensation Information (Employee Central users)
SAP Global User ID	SAP Global User ID uniquely identifies a user across SAP business applications and services.	Yes	No	Yes	NA

1.1.1 Global User ID

Global User ID uniquely identifies a user across SAP business applications and services. It replaces the need for a correlation of different external user identifiers.

Characteristics

- The global user ID is optional. It can be empty when you create a new user account.
- The global user ID is a mutable attribute. It's not recommended but you can update it through APIs or UIs.
- The global user ID is case-sensitive.
- The global user ID is unique. Don’t reuse global user IDs.
- The global user ID is the default solution for establishing a common user identifier in integration scenarios.

Value Format

You can provide values for global user IDs. Make sure that the values follow this format:

- The value contains a maximum of 36 characters. It can contain alphanumeric characters ([A-Z][a-z][0-9]) and the characters minus-sign (-), plus-sign +, underscore (_), forward-slash (/), double-colon (:), dot (.). Don't use the email format or the at-sign (@).
- Use a neutral identifier that doesn't contain sensitive data (e.g. the name of a person).
- Use a GUID.

Data Source of Global User IDs

Global user IDs can be communicated to SAP SuccessFactors from below two data sources:

- Global user IDs can be created in SAP Cloud Platform Identity Authentication Service (IAS) and communicated to SAP SuccessFactors through Identity Provisioning Service (IPS) through SCIM APIs.
- Global user IDs can also be created in third-party identity management tools and communicated to SAP SuccessFactors.

Related Information

Overview of SAP SuccessFactors Workforce System for Cross-Domain Identity Management API [page 174]

1.1.2 Assignment ID

Assignment ID is an identifier assigned to the work relationship between a person and the company. The relationship could be an employment relationship, contingent relationship, pensioner relationship, intern, global assignment, or others. A person can have one or many work relationships with a company at the same time, for example, concurrent employments or home and host assignment in a global assignment.

> Note
>
> Currently, assignment ID is **not** supported in some SAP SuccessFactors areas, for example, Learning, Compensation, Onboarding 1.0, and data protection and privacy features. This might cause display inconsistencies across the HCM suite. Refer to the Important Notes about Assignment ID to find the specific areas impacted by assignment ID as well as the areas where assignment ID is **not** supported. This document will be regularly updated to reflect the latest development of assignment ID.

> Caution
>
> Before you change assignment IDs, we recommend that you evaluate the risks associated with the inconsistencies. If assignment ID is not supported in the SAP SuccessFactors areas you've enabled, please don't make any changes to assignment ID at this time.

Assignment ID (assignment_id_external) is unique, case-sensitive, visible, and can be given to an employee, a contingent worker, or an intern. Assignment ID is used to identify users across the HCM suite, in import and export tools, in the user interface, in APIs, and in reports.

The system automatically generates assignment IDs for users created prior to the Q3 2019 release, and their default values are the same as the current user IDs. However, in the Employee Central-enabled instances, if you have used a business rule to generate assignment IDs, the system then creates assignment IDs based on the rule and the assignment IDs might be different from the user IDs. When you create new users using the user management tools such as *Employee Import*, *Manage Users*, or OData APIs, assignment IDs for these users are also added to the system.

Assignment ID can be changed **ONLY** through the convertAssignmentIdExternal function import.

Why Assignment ID?

Previously, when you wanted to change user IDs in some cases, such as employee relocation or going live on Employee Central or another HRIS system, a support ticket was needed. The user ID conversion process was costly and time-consuming. In addition to this, user ID conversion wasn't supported in Employee Central, Metadata Framework, or SAP HANA database.

Now, you can use assignment ID to identify users and change it if needed.

Assignment ID in Employee Central Integration

Assignment ID is a unique identifier in Employee Central and assigned to the Employee Central object employment. It is a multiple purpose field. Currently assignment ID supports two main scenarios. One is the Platform use case of managing users with the Manage Users, Employee Import, Import Extended User Information admin tools, and OData APIs. The other is the integration use case of the Employee Central to SAP ERP system or SAP S/4HANA (SAP ERP/S/4). In the Employee Central integration use case, the assignment ID is equal with the SAP ERP/S/4 PERNR (personnel number). Employee Central is responsible for ensuring the assignment ID matches the SAP ERP/S/4 PERNR format and determines an assignment ID by using rules during all processes where a new employment is created. As a result, the assignment ID (8 digit max) is generated and replicated to the integrated SAP ERP/S/4 system.

For more information, refer to Using Assignment ID in Employee Central Integration with SAP ERP HCM.

> ⓘ Note
>
> You must decide on one scenario and are not allowed to switch between the two scenarios.

Check Tool for Employment Information

You can use the Check Tool to find any missing or inconsistent assignment IDs in the system. Any fix would result in the update to your data in Employee Central. We recommend selecting the check available under the *Employee Central Core* > *Employment Information* section.

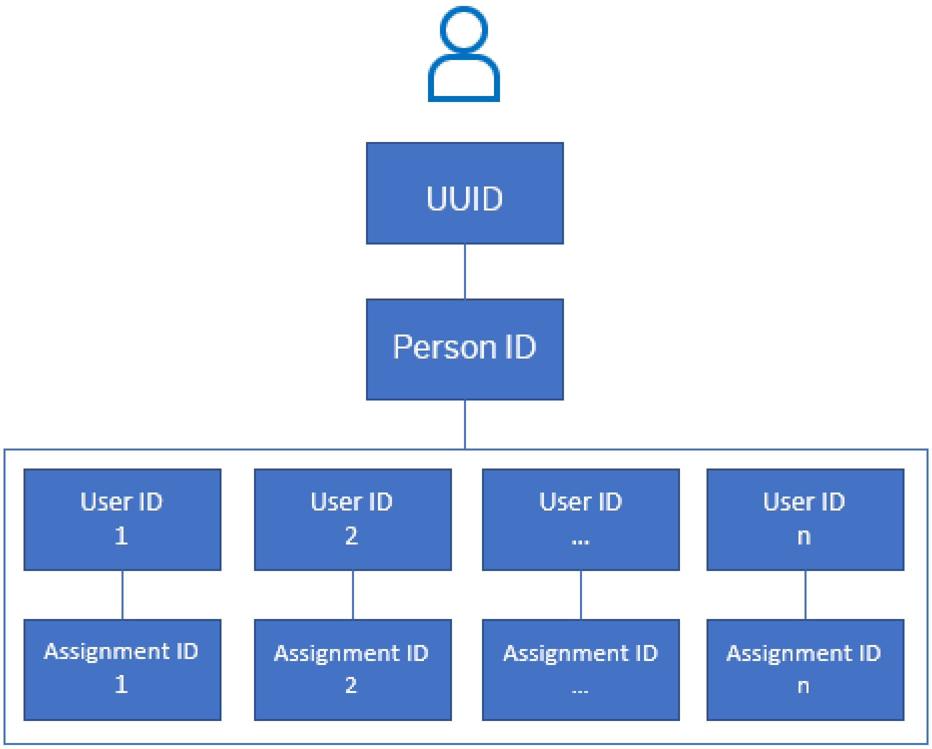
Differentiating Between Person ID, UUID, User ID, and Assignment ID [page 13]
Read the following table to find the differences and relationships between person ID, UUID, user ID, and assignment ID.

1.1.2.1 Differentiating Between Person ID, UUID, User ID, and Assignment ID

Read the following table to find the differences and relationships between person ID, UUID, user ID, and assignment ID.

<table>
<tr><th>Field</th><th>Description</th><th>Can this ID be changed?</th><th>Relationship between these IDs</th></tr>
<tr><td>Person ID (person-id-external)</td><td>A unique identifier of a person in Employee Central. Person ID identifies a natural person. An employee generally has only one person ID throughout their time at the company, since this ID is associated to each person.</td><td>Yes</td><td rowspan="2">UUID and person ID are in a one-to-one relationship.
User ID and assignment ID are in a one-to-one relationship.
One person ID is associated to one or more user IDs and assignment IDs.
One UUID is associated to one or more user IDs and assignment IDs.</td></tr>
<tr><td>UUID (per-person-uuid)</td><td>This identifier is generated when person data is created in the system. UUID is introduced for integrating person data in Employee Central with other modules. UUID is stored at a database level only and is not visible on the UI.</td><td>No</td></tr>
</table>

Field	Description	Can this ID be changed?	Relationship between these IDs
User ID (users-sys-id)	A unique identifier of user entity. A person might have one or more user IDs, for example, in the case of global assignments or concurrent employments. If a customer has only one employment for each person in SAP SuccessFactors, the user ID can serve as the person’s unique identifier in the company.	No	
Assignment ID (assignment-id-external)	Assignment ID is actually the "mutable user ID". It is visible to customers and can be used to identify users. A person might have one or more assignment IDs, for example, in the case of global assignments or concurrent employments. If a customer has only one employment for each person in SAP SuccessFactors, assignment ID can serve as the person’s unique identifier in the company. In Employee Central, the assignment ID field can be used to store a unique identifier. For example, in the Employee Central integration scenarios, customer store the SAP ERP PERNR (personnel number) in this field.	Yes	



Relationship Between Person ID, UUID, User ID, and Assignment ID

Parent topic: Assignment ID [page 11]

Related Information

Assignment ID in User Management [page 15]
Import and Export Tools [page 16]
OData API [page 18]
Manage Users [page 20]
Important Notes About Assignment ID [page 21]
Enabling the SAP One Domain Model ID [page 26]
Creating Personnel Number Using the Employee Central Assignment ID

1.1.2.2 Assignment ID in User Management

This section describes the impact of assignment ID on user management tools such as *Manage Users*, *Employee Import*, *Import Extended User Information*, and OData APIs.

To learn the impact of assignment ID in Employee Central imports, see Assignment ID Definition with Data Imports.

Parent topic: Assignment ID [page 11]

Related Information

Differentiating Between Person ID, UUID, User ID, and Assignment ID [page 13]
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1.1.2.3 Import and Export Tools

There's an *Assignment ID* column in the user data file of import and export tools.

> Note
>
> By default, the user data template contains the Assignment ID column. If you don't want to include assignment ID in the user data file, select *Exclude Assignment ID Column from the User Data Template* in *Admin Center* > *Platform Feature Settings*.

Employees Import and Employees Export

When you add or update user data using *Employee Import*, user ID is **required** while assignment ID is **optional** in the template. Note that assignment ID is in the last column. If you don't input a value in the Assignment ID column, the system will populate the value from user ID to assignment ID after the import job completes. If you provide assignment ID for new users in the import file, make sure that assignment ID and user ID be the **same**. Otherwise, the user won't be imported.

When you export a user data file using *Employee Export*, the export file includes an assignment ID column with values.

For more information about *Employee Import* and *Employee Export*, see Managing Basic User Data by Using a Data File.

Import Extended User Information and Export Extended User Information

When adding or updating personal information, background information, or trend information using *Import Extended User Information*, you should either provide user ID or assignment ID in the import file, and they should be the same as the corresponding user ID or assignment ID that already exists in the system.

When you export user data file using *Export Extended User Information*, the export file includes an assignment ID column with values. Note that assignment ID is in the last column in the import and export file for **personal information**.

For more information about *Import Extended User Information* and *Export Extended User Information*, see Managing Extended User Information by Using Data Files .

Delta Employees Import and Delta Employees Export

When you add or update user data in *Provisioning* > *Manage Scheduled Jobs* > *Create New Job* > *Delta Employees Import*, you should first download the user data template where assignment ID is in the last column. Currently, user ID is **required** while assignment ID is **optional** in the template. If you don't input a value in the Assignment ID column, the system will populate the value from user ID to assignment ID after the import job completes. If you provide assignment ID for new users in the import file, make sure that assignment ID and user ID be the **same**. Otherwise, the users won't be imported.

When you export user information using *Delta Employees Export*, the export file includes an assignment ID column with values.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Live Profile Import and Live Profile Export

When adding or updating personal information, background information, or trend information in *Provisioning* > *Manage Scheduled Jobs* > *Create New Job* > *Live Profile Import*, you should either provide user ID or assignment ID in the import file, and they should be the same as the corresponding user ID or assignment ID that already exists in the system.

When you export user data file using *Live Profile Export*, the export file includes an assignment ID column with values. Note that assignment ID is in the last column in the import and export file for **personal information**.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Parent topic: Assignment ID [page 11]

Related Information

Differentiating Between Person ID, UUID, User ID, and Assignment ID [page 13]

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1.1.2.4 OData API

You can enable assignment ID for OData API by adding the assignmentIdExternal property to an entity or by navigating to an entity that has this property.

You can access the assignment ID information through:

- The `User` entity
- The `EmpEmployment` and `EmpGlobalAssignment` entities in Employee Central
- Other OData API entities with a User-type navigation property
- The `convertAssignmentIdExternal` function import. This function import is the only way to change an assignment ID.

> → Tip
>
> We don't recommend inserting values to assignmentIdExternal in `User`, `EmpEmployment`, or `EmpGlobalAssignment` even if it's technically possible. If you do, make sure assignmentIdExternal has the same value as userId. Otherwise, an error occurs.
>
> For existing records, when you enable the assignmentIdExternal property, it has the same as userId. For newly created records, assignment ID value is the same as userId except when a business rule is enabled in Employee Central for generating assignment IDs automatically. For more information, see Auto-generating Assignment ID for Employees on Global Assignment or Concurrent Employment.

Enabling Assignment ID for `User` Entity

You can add assignment ID to the `User` entity by enabling the `assignmentIdExternal` field in the data model:

1. Go to *Admin Center* > *Manage Busines Configuration*.
2. Expand *Employee Profile* > *Standard* and choose `assignmentIdExternal`.

   > ⓘ Note
   >
   > If you don't see the field in the *Standard* section, contact Technical Support to schedule a job with job type *Synchronize Business Configuration* in Provisioning. This job synchronizes the BCUI elements with the company data model.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

3. On the detail screen, set the *Enabled* option to **Yes**.

> ⓘ Note
>
> We recommend that you set the *Visibility* attribute of the field to **View** to disable upsert operations.

To see the property in the entity immediately, refresh the OData metadata. To do so, go to *Admin Center* > *OData API Metadata Refresh and Export* or run query https://<API-endpoint-URL>/odata/v2/refreshMetadata.

Enabling Assignment ID for Employee Central Entities

To enable assignment ID for `EmpEmployment` and `EmpGlobalAssignment` in Employee Central:

1. Go to *Admin Center* > *Manage Busines Configuration*.
2. Expand the *HRIS Elements* section and add the *assignmentIdExternal* field to the following elements:
   - For `EmpEmployment`, choose the *employmentInfo* element and add the field on the detail screen.
   - For `EmpGlobalAssignment`, choose the *globalAssignmentmentInfo* element and add the field on the detail screen.
3. Set the *Enabled* option to **Yes**.

> ⓘ Note
>
> We recommend that you set the *Visibility* attribute of the field to **View** to disable upsert operations.

To see the property in the entities immediately, refresh the OData metadata. To do so, go to *Admin Center* > *OData API Metadata Refresh and Export* or run query https://<API-endpoint-URL>/odata/v2/refreshMetadata.

Retrieving Assignment ID Through Navigation Properties

Many OData API entities have one or multiple navigation properties that point to `User` records. If assignmentIdExternal is enabled for `User` in your instance, you can retrieve assignment ID information from associated entities using the `$expand` option. Here's an example:

```
https://<API-endpoint-URL>/odata/v2/
Form360Rater(formContentId=123L,formDataId=345L)?
$expand=participantUser&$select=participantUser/assignmentIdExternal
```

Changing Assignment ID Using convertAssignmentIdExternal Function Import

Changing assignment IDs is only possible using the `convertAssignmentIdExternal` function import. For more information, see convertAssignmentIdExternal.

Parent topic: Assignment ID [page 11]

Related Information

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Using BCUI

1.1.2.5 Manage Users

When *Show User ID field in Manage Users* is selected in Provisioning, there's an *Assignment ID* field as well as a *User ID* field on *Manage Users* .

> ⓘ Note
>
> Please be aware that even if there's no assignment ID or user ID field displayed on the *Manage Users* page when you're creating new users, the system will still assign the two IDs to them. In this case, the initial value of user ID and assignment ID is the same as the value you enter in the *User Name* field.

Currently, whether the *User ID* or *Assignment ID* field is displayed on *Manage Users* is controlled by *Show User ID field in Manage Users* in Provisioning. This option is disabled by default. Once it's enabled, the two fields are displayed next to each other.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

On the *Quick Add* or *Detailed Add Users* page, if you enter a value in the *User ID* field, the value will be automatically populated to the *Assignment ID* field.

You can work with implementation partners or Support to customize the label name of assignmentIdExternal in the data model. We recommend that the label name be "Assignment ID".

For more information about *Manage Users*, see Managing Basic User Data by Using the UI.

Parent topic: Assignment ID [page 11]

Related Information

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1.1.2.6 Important Notes About Assignment ID

Read this to find the areas that are impacted by assignment ID as well as the areas where assignment ID is not supported.

> ⚠ Caution
>
> Before you change assignment IDs, we recommend that you evaluate the risks associated with the inconsistencies. If assignment ID is not supported in the SAP SuccessFactors areas you've enabled, please don't make any changes to assignment ID at this time.

Areas Impacted by Assignment ID

Read the table to find the changes caused by assignment ID in the following areas.

Areas impacted	Notes
360 Reviews	360 Reviews OData API entities `Form360SummaryViewRater`, `FormRaterListSection`, `Form360Rater`, `Form360Participant`, `Form360ParticipantDetail`, and `Form360ReviewContentDetail` can retrieve assignment ID information by expanding the navigation properties `<participantUser>`, `<originatorUser>`, and `<subjectUser>`.
Calibration	Two navigation properties are added to retrieve users' assignment IDs: subjectUser to CalibrationSessionSubject entity and employeeUser to TalentRatings entity.

Areas impacted	Notes
Data Subject Information Report	If user ID appears in a Data Subject Information report, then, as of the Q4 2019 release, assignment ID will also appear in the report for certain modules.
Employee Central Imports	Employee Central Imports now supports employee data import using assignment ID. You can use assignment ID while importing data for employees having concurrent employment or global assignment. For details, see Assignment ID Definition with Data Imports.
Employee Central OData API	Employee Central OData API entities `EmpEmployment` and `EmpGlobalAssignment` now support assignment ID with the new `<assignmentIdExternal>` property. You can enable it by adding the `<assignmentIdExternal>` field to the corresponding HRIS elements for employment information and global assignment information in the *Manage Business Configuration* (BCUI) tool. As of 1H 2020, the `<assignmentIdExternal>` property is always included in the response of EmpEmployment, whether or not it is configured in Succession Data Model (SDM). For details, see OData API [page 18] and the API references in SAP SuccessFactors Employee Central OData API: Reference Guide.
Employee Central Integration with ERP	Integration of Employee Central with SAP S/4HANA (on-premise edition) or SAP S/4HANA Cloud Private Edition or with an SAP ERP HCM system transfers assignment ID if it is enabled in Employee Central. For more information, refer to the following pages: • If you use the SFSF EC INTEGRATION add-on (product SAP SuccessFactors Employee Central Integration to SAP Business Suite, software component `PA_SE_IN`): Using Assignment ID in Employee Central Integration with ERP • If you use the SFSF EC S4 HCM INTEGRATION add-on (product SAP SuccessFactors Employee Central integration with SAP Human Capital Management for SAP S/4HANA, software component `ECS4HCM`): Use of Assignment ID in Employee Central Integration with SAP S/4HANA
Employee Central Payroll	Integration of Employee Central with Employee Central Payroll transfers assignment ID if it is enabled in Employee Central. For more information, see Optional: Using the Employee Central Assignment ID External as PERNR.
Onboarding	Onboarding supports assignment ID external for the following OData API entities: `createOnboardee` and `initiateOnboardingForUser`. It also supports assignment ID external for all the events.

Areas impacted	Notes
Platform - Data Protection and Privacy	Changing assignment ID adds complexity and may impact data protection and privacy features. However, if necessary, you can use assignment ID, instead of user ID, when you set up and manage data protection and privacy features. For example, you can use assignment ID instead of user ID when you upload a list of users to purge.
Platform - OData API	The `User` entity now supports assignment ID with the new `<assignmentIdExternal>` property. Learn how to enable it in OData API [page 18]. Other OData API entities with a User-type navigation property can also retrieve assignment ID information by expanding the navigation property.
Platform - Instance Refresh Tool	The Instance Refresh self-service tool now supports assignment ID. The *Overview* tab of the *Instance Refresh Center* page displays the assignment ID instead of User ID in the *Requested By* column for each refresh request. Note The Instance Refresh Center page displays the user ID when a user does not have an assignment ID.
Platform - Metadata Framework	• On the *Manage Data* page, audit information now displays assignment ID instead of the user ID. • The *Import and Export Data* tool now supports the assignment ID as an *Identity Type*. You can choose between user ID and assignment ID in the new *Identity Type* field. The identity type you select will be included in the exported template and data, and it will be used to validate the user information during data import.
Platform - Presentations	Assignment ID, in addition to User ID, can be included on Presentations Talent Card and customized slides.
Platform - Proxy Management	In the proxy import file, you can now identify users by Assignment ID or by User ID. In the proxy report, you can now see columns for both Assignment ID and User ID.
Platform - Role-based Permission	You can use the *Assignment ID* field when importing static permission groups to your system. When you download the most recent version of the static group excel document, the *Assignment ID* displays.

Areas impacted	Notes
Recruiting Management	Recruiting Management supports assignment ID in: • The data migration templates that support Assignment ID field to populate the users are Candidate tag assignments, Candidate tag definitions, Job Requisition, and Application attachments. • The OData APIs that support access to Assignment ID information through User-type navigation are Candidate, jobApplication, jobOffer, and jobRequisition. • User Interface of the internal Candidate Profile screen see Assignment ID instead of UserSysID.
Reporting and Analytics	The Reporting and Analytics products support reporting on the Assignment IDs that the sub-domain schemas in "Live Data" and "Advanced Reporting" data sets support.
Time	In general, Time screens display the user's real name (that is, first name and last name) rather than their user ID. So the average user won't see anything different even if their user ID is changed in the background. For technical users that run the Check Tool and monitor background jobs, however, there will be a new column called *Assignment ID* that will show any changed user IDs.

Areas Where Assignment ID Is Not Supported

Solutions	Notes
Compensation and Variable Pay	Compensation and Variable Pay do not currently use or support assignment ID. The only identifier that is supported is user ID.
Employee Central Document Generation	Employee Central Document Generation does not support assignment ID.

Solutions	Notes
Learning	Learning does not currently use or support assignment ID. The only mutable identifier it supports is person_id_external. If you are using *convertAssignmentIdExternal* import function to modify user's Assignment_id_external field to something other than the users_sys_id value, then you may end up seeing different identifiers on the LMS UI and reports as compared to what you see on other screens in the SAP SuccessFactors HCM suite. We advise you to consider the impact before you proceed with such a change. Also, there is no current plan or time-line for Learning to adopt the assignment ID field in the near future.
Onboarding 1.0	Currently, Onboarding 1.0 does not support assignment ID. It is using user ID as login name. The only mutable identifier it supports is person_id_external, which Onboarding 1.0 provides during step completion event.
Platform - Data Protection and Privacy	Customers using data protection and privacy features are advised **not** to use assignment ID as a changeable user identifier, due to current limitations. Assignment ID is not fully supported across the HCM suite. To reduce complexity and avoid potential impacts to data protection and privacy, ensure that assignment ID and user ID are always the same.
Platform - Instance Synchronization Tool	Instance Synchronization does not support assignment ID.
Platform - Role-Based Permissions	Dynamic permission group creation does not support assignment ID.
Position Management	Position Management does not support assignment ID.
Reward and Recognition	Reward and Recognition does not support the assignment ID.
Succession	Currently, Succession does not support assignment ID. When users import or export with *Position Management: Import Positions*, *Position Management: Export Positions*, or *Import Successors* admin tools, user ID is used instead of assignment ID.

Parent topic: Assignment ID [page 11]

Related Information

Differentiating Between Person ID, UUID, User ID, and Assignment ID [page 13]

Assignment ID in User Management [page 15]
Import and Export Tools [page 16]
OData API [page 18]
Manage Users [page 20]
Enabling the SAP One Domain Model ID [page 26]

1.1.2.7 Enabling the SAP One Domain Model ID

The SAP One Domain Model ID for Analytics across Lines of Business is used to gain business insights and to provide data driven decisions.

Context

The SAP One Domain Model ID (OID) establishes a common identifier for a business entity (for example, Person) across different Lines of Business, facilitating the integration of data across different business areas.

The following list displays the SAP SuccessFactors Employee Central entities that are required for Analytics across Lines of Business to provide OID support.

HR Master Data

- Person
- Job Classification
- Business Unit
- Division
- Department
- Location

Non-HR Master Data

- Cost Center
- Legal Entity
- Bank
- Exchange Rate
- Vendor Info

The OID is stored in a separate field for each of the entities. The field is called *entityOID* for all entities, except for person, where it's called *per-person-oid*.

HR Master Data entities will always automatically have an OID assigned upon creation. The OID value for these entities is immutable once assigned.

Non-HR Master Data will only have an OID assigned if the system which owns the Master Data (the finance system SAP S/4 HANA for Cost Centers, for example) sends information through an inbound integration to SAP SuccessFactors Employee Central. (for more information, refer to the *Related Information* section of this page). The OID value is mutable for these entities.

Procedure

1. Go to *Manage Business Configuration* > *personInfo* > *Take Action*. Enable the per-person-oid field.
2. Select the *per-person-oid* from the HRIS Fields and enter the following details:

Option	Description
Enabled	Yes
Mandatory	Yes
Visibility	Edit
Allow Import	No

3. *Save* your changes.
4. Enable the migration of the SAP One Domain Model ID. For some HR Master Data entities, it is required to use the appropriate upgrade in the Upgrade Center to ensure that all existing and new records will have an OID assigned. Use the following Upgrade Center upgrades.

   Enable SAP One Domain Model ID for Person for Analytics across Lines of Business

   Enable SAP One Domain Model ID for Business Unit for Analytics across Lines of Business

   Enable SAP One Domain Model ID for Department for Analytics across Lines of Business

   Enable SAP One Domain Model ID for Division for Analytics across Lines of Business

   Enable SAP One Domain Model ID for Job Classification for Analytics across Lines of Business

   All existing records have an OID assigned. Any new record that is created will automatically have an OID assigned.
5. Verify whether the OID has been assigned for MDF Entities.
   - Ensure that the *entityOID* field is set to *visible* in the object definition.
   - Go to *Manage Data* and open the record for which you want to verify the OID.
   - Verify that the entityOID field is filled.
6. Verify whether the OID has been assigned for Person.
   - Ensure that the per-person-oid field is set to enabled in Manage Business Configuration
   - Go to *Integration Center* > *My Integration* > *Create* > *Scheduled Simple File Output Integration* > *Biographical Information*.
   - Select the *SAP One Domain Model ID* field as part of the output.
   - Verify that the per-person-OID field is filled.

Task overview: Assignment ID [page 11]

Related Information

Differentiating Between Person ID, UUID, User ID, and Assignment ID [page 13]
Assignment ID in User Management [page 15]
Import and Export Tools [page 16]

OData API [page 18]
Manage Users [page 20]
Important Notes About Assignment ID [page 21]
Introduction

1.2 About Technical User

A technical user is a special user created for integrating SAP SuccessFactors with other SAP products and solutions.

A technical user is generated during data migration process of the existing instances, or when a new instance is created. It is not a real person, and will be granted permissions to access data required for integration using APIs. It is now used in the integration between SAP SuccessFactors and Best Practice.

Please note that a technical user cannot be purged in the system or exported using Employee Export, or API. It won't be included in reports. You cannot use technical user to log into SAP SuccessFactors.

Related Link: Registering Your OAuth2 Client Application

2 Getting Started with User Information Management

Perform the following tasks to manage user information in your system.

> ⓘ Note
>
> If you're using an HRIS system, before you make any user changes, make sure that there is no HRIS Sync Job running in the background. Modifying user data during the HRIS sync might lead to data discrepancies. Please contact your Implementation Partner to know the scheduled time for the HRIS sync jobs of your system. If you are no longer working with an Implementation Partner, contact Technical Support.

Step	More information
Understand the prerequisites.	Prerequisites for Managing User Information [page 30]
Understand assignment ID	Assignment ID [page 11]
Add users by using the UI.	Adding Users [page 54]
Add users by using a data file.	Importing Basic User Data [page 132]
Send welcome emails to new users.	Sending Welcome E-mails Manually [page 63]
Manage basic user information by using the UI.	Managing Basic User Data by Using the UI [page 54]
Managing basic user information by using a data file.	Managing Basic User Data by Using a Data File [page 98]
Managing extended user information.	Adding or Updating Extended User Information [page 142]
Reset user accounts.	Resetting Accounts [page 47]
Reset user passwords.	Resetting Passwords as a User [page 66]
Validate user data by using the Check Tool.	Using the Check Tool to Solve Issues [page 195]
Manage users by using OData APIs.	Managing Users with OData APIs [page 171]
Remove users from the system.	Setting User Status to Inactive [page 58]

Related Information

User Information [page 5]
Prerequisites for Managing User Information [page 30]
Choosing a Tool for User Management [page 30]

2.1 Prerequisites for Managing User Information

User Information Management is a fundamental activity in the SAP SuccessFactors system. You need to ensure that all user fields your company needs are included and defined with required information in the data model.

Make sure that you have included all user data fields in the data model for your system. Setting up data model with required information is a standard part of nearly all SAP SuccessFactors implementations and most likely already done for your system.

If you want to configure changes and add user data fields in the data model, you can use the Business Configuration UI (BCUI). This tool enables you to maintain the data model from your end-user UI, instead of maintaining these elements in the XML file and contacting SAP Could Support who has access to Provisioning. For more information, see Setting Up and Using Business Configuration UI (BCUI).

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Related Information

User Information [page 5]
Getting Started with User Information Management [page 29]
Choosing a Tool for User Management [page 30]

2.2 Choosing a Tool for User Management

Depending on whether or not you are managing users in Employee Central, you need different tools to perform the same user management task.

Refer to the following table to choose the correct tool depending on your system configuration.

If you want to...	Use this tool for users that are managed in Employee Central	Use this tool for users that are NOT managed in Employee Central	See more information at...
Add or update basic user information by using the UI	Employee Self-Service and Manager Self-Service in *People Profile*	*Manage Users*	People Profile Employee Self-Service (ESS) Manager Self-Service (MSS) Managing Basic User Data by Using the UI [page 54]
Add or update basic user information by using a data file	*Import Employee Data* > *Basic Import*	*Employee Import*	Employee Data Imports Managing Basic User Data by Using a Data File [page 98]
Add or update extended user information	*Import Extended User Information* or *Import Employee Data* > *Extended Import*	*Import Extended User Information*	Employee Data Imports Adding or Updating Extended User Information [page 142]
Download basic user information	*Employee Export*		Exporting Basic User Data [page 101]
Download extended user information	*Export Extended User Information*		Exporting Extended User Information [page 144]
Validate your user data	*User Management* checks in the *Check Tool* admin tool.		Using the Check Tool to Solve Issues [page 195]

If you're looking for information about managing Employee Central users, please see SAP SuccessFactors Employee Central.

Related Information

User Information [page 5]
Prerequisites for Managing User Information [page 30]
Getting Started with User Information Management [page 29]

2.3 Succession Data Model

Succession Data Model is a core data model for employee data.

The Data Model describes how data elements are structured in a database. It also defines the properties these elements possess and their relationships to each other.

Everytime you import data model from Provisioning, the system automatically saves the import file as a backup. You can restore a data model from the backup version list. Please note that the list displays a limited number of data model versions.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

When you import data model, you should write some comments. This helps you track data model changes.

2.4 Restoring a Data Model Version

You can restore a data model version from Provisioning.

Context

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Procedure

1. Log in to Provisioning and select the company to work with.
2. In *Succession Management*, select *Import/Export Data Model*.
3. In the *Backup Versions* list, select a data model version and choose *Download*
4. Select *Import File* to import the downloaded data model file.

Results

You've successfully restored a data model version for your instance.

3 Managing Login Accounts

A login account stores the information that can be used for authenticating users when they log into a system. You can manage login accounts using the *Manage Login Accounts* tool.

Context

A login account is used for authenticating users when they log into SAP SuccessFactors. It includes information such as login name, login method, and login locale.

If you have Employee Central enabled for your instance, the system automatically selects the user of the home employment, primary employment, or earliest active employment as the main user on the homepage in the cases of global assignments, concurrent employment, or contingent workers, respectively.

You can now reset password of one or more login accounts on the *Manage Login Accounts* page.

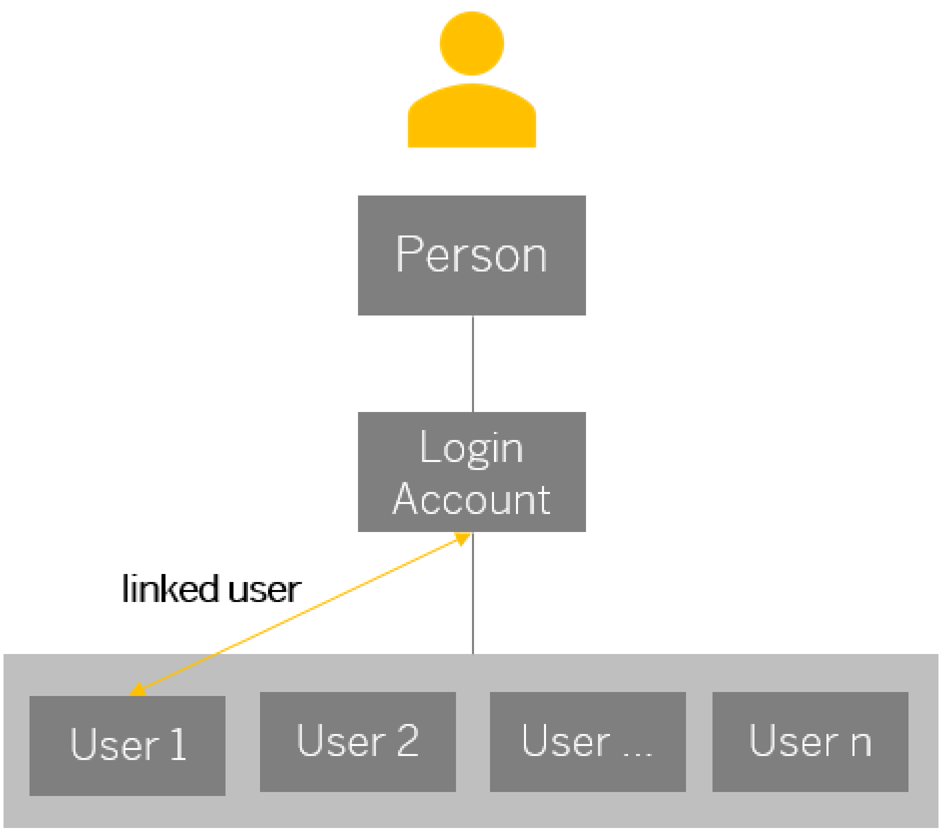
User Login Data Purge [page 50]
User Login data is purged automatically after one year.

Exporting Login Data with Table Report [page 50]
You can use Table report to export login data.

Enabling Case-Insensitive Usernames [page 52]
You can manage the case sensitivity of usernames in your company system. By enabling case-insensitive usernames, you can better integrate your SAP SuccessFactors system with other SAP products.

3.1 Differentiating Between Person, User, and Login Account

A person can have multiple users but only one login account.



Person refers to a natural person, while user refers to employment. A person might have more than one user, for example, in the cases of global assignments or concurrent employment, but only one login account. But please note that in some special cases, a person (for example, dependents in the Employee Central-enabled instance) doesn't have login account.

A login account is active as long as the person has at least one active user. It stores the following key information:

- **Login name**: Login name is unique. By default, the login name in a login account is the same as the username of the first employment. For example, if the username of a person's first user is "Cgrant", then the person's

default login name will also be "Cgrant". A login account is linked with the user whose username is the same as login name. If the **linked user's** username, password, login method or locale is changed using import tools, UI, or API, then the relevant information in a login account is changed accordingly.
Currently, you can use either login name or username to log into SAP SuccessFactors, but we recommend that you use login name.

- **Login method**: Login method is either SSO (single sign-on) or PWD (password).

> ⓘ Note
>
> The login method specified in a login account works only when the company has enabled Partial Organization SSO. Otherwise, a person always accesses the system using the login method specified by the company-level setting in Provisioning.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

- **Login locale**: Login locale is the language that you use to log into the system, and the system user interface is displayed in your login locale.

Parent topic: Managing Login Accounts [page 34]

Related Information

Viewing Login Accounts [page 37]
Exporting Accounts Template [page 38]
Exporting Login Accounts [page 39]
Importing Login Accounts [page 41]
Changing Login Accounts [page 42]
Enforcing User Account Upgrade [page 43]
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Enabling Case-Insensitive Usernames [page 52]

3.2 Viewing Login Accounts

As an administrator, you can view employees' login account information.

Prerequisites

You have the *Manage Login Accounts* permission from *Manage Permission Roles* > *Administrator Permissions* > *Manage User*.

Procedure

1. Go to *Admin Center* > *Manage Login Accounts*.
2. Search for a person's login account using first name, middle name, last name, username, login name, person ID, account ID, or global user ID.

   You can search for user types such as employees, new hires, external learners, alumni, and 360 external raters.

   On the *Search Results* page, you can find the account information such as person ID, display name, login name, account ID, global user ID, login method, locale, status, account type, and primary assignment. Please note that the login method might be displayed as blank, and that is because it has empty value in the database.
3. **Optional:** Filter your search results using the *All*, *Active*, and *Inactive* buttons.
4. **Optional:** Hide and display columns in the table by choosing *Settings*.
5. **Optional:** If you want to notify employees about their login account information, select the accounts and then choose *Send Email Notification*.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
Exporting Accounts Template [page 38]
Exporting Login Accounts [page 39]
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Enabling Case-Insensitive Usernames [page 52]

3.3 Exporting Accounts Template

Before you import login accounts, you need to export an accounts template and prepare your import file.

Prerequisites

You have the *Export Accounts* permission.

Procedure

1. Go to *Admin Center* > *Manage Login Accounts*.
   The *Manage Login Accounts* page displays.
2. Choose *Export Accounts Template* from the *Import and Export* dropdown.
3. Select a language from the *Language of Table Column Headers* dropdown.
   It's for the column header language in the export file. Not the entries in the file.
4. Select an encoding type from the *Character Encoding* dropdown.

   > Note
   >
   > Only *UTF-8* is supported.
5. Choose *Export*.

Results

You've successfully exported an account export template.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]

[Viewing Login Accounts [page 37]
Exporting Login Accounts [page 39]
Importing Login Accounts [page 41]
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Enabling Case-Insensitive Usernames [page 52]

3.4 Exporting Login Accounts

You can export login accounts using the *Manage Login Accounts* admin tool.

Prerequisites

You have the *Export Accounts* permission.

Context

You can export below login account data using the *Manage Login Accounts* tool.

ACCOUNT_UUID	LOGIN_NAME	LOGIN_METHOD	LOCALE	TIME_ZONE	PERSON_ID	ACCOUNT_STATUS	ACCOUNT_TYPE

Procedure

1. Go to *Admin Center* > *Manage Login Accounts*.
   The *Manage Login Accounts* page displays.
2. Choose *Export Accounts* from the *Import and Export* dropdown.
3. Select a language from the *Language of Table Column Headers* dropdown.
   It's for the column header language in the export file. Not the entries in the file.

4. Select an encoding type from the *Character Encoding* dropdown.

> ⓘ Note
>
> Only *UTF-8* is supported.

5. Choose *Export*.
   A success toast displays informing you that an account export job was created.

Results

When the account export job finishes, you can refresh the page to see a message in the header informing you the link to download the export file. The export file will expire in 48 hours after job completion.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
Viewing Login Accounts [page 37]
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3.5 Importing Login Accounts

You can import multiple login accounts using the *Import Accounts* feature in *Manage Login Accounts*.

Prerequisites

- You have the *Import Accounts* permission.
- You've prepared an account import file using the template downloaded in *Manage Login Accounts* > *Export Accounts Template*.

> **Note**
>
> You can update login name, login method, locale, and time zone using the *Import Accounts* feature. You can't update account UUID. Person ID, account status, and account type are for your reference only.

Procedure

1. Go to *Admin Center* > *Manage Login Accounts*.
   The *Manage Login Accounts* page displays.
2. Choose *Import Accounts* from the *Import and Export* dropdown.
3. Select an encoding type from the *Character Encoding* dropdown.

   > **Note**
   >
   > Only *UTF-8* is supported.
4. Choose *Select File* and select the file you prepared.
5. Choose *Import*.
   A success toast displays informing you that an account import job was created.

Results

You've successfully imported login accounts. You can check job details in *Scheduled Job Manager*.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
Viewing Login Accounts [page 37]
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3.6 Changing Login Accounts

As an administrator, you can change an employee's login account when the employee has **more than one** users.

Prerequisites

You have the *Manage Login Accounts* permission from *Manage Permission Roles* > *Administrator Permissions* > *Manage User*.

Procedure

1. Go to *Admin Center* > *Manage Login Accounts*.
2. Search for a person's login account using first name, middle name, last name, username, login name, or person ID, and then choose *Change Login Account*.
3. On the *Change Login Account* popup, select an account and then *OK*.

   If you want to update the password-related settings of the login account accordingly, select the *Update the password-related settings of the login account accordingly.* option.

   The person can now log into the system using the new login name.

Results

The person's login account is successfully changed. The system will automatically send the person an email if *Login Account Changed Notification* has been enabled in *E-Mail Notification Template Settings*.

Task overview: Managing Login Accounts [page 34]

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3.7 Enforcing User Account Upgrade

Instances using employment-based logins can upgrade to account-based logins for a more consistent login experience for all users. The enhancement also ensures smooth integration with IAS, which supports only account-based logins.

Context

This upgrade option is available to instances that are using the PWD login method and employement-based logins.

Procedure

1. Go to *Admin Center* > *Company Logo and System Settings*.

2. Select *Enforce user account upgrade for consistent login experience*.
3. Save your changes.

Results

After selecting this option, all users must use their login names to access the system. Users who previously didn't use a login name to log in need to set new passwords for their login accounts. A reset password popup displays for these users. After they reset their password, they **must** log in using their login name and password.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
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3.8 Sending Login Account Related E-mails

As an administrator, you can notify employees of their login account information or changes to their login accounts.

Prerequisites

- You have the *Manage Login Accounts* permission from *Manage Permission Roles* > *Administrator Permissions* > *Manage User*.
- *Login Account Notification* and *Login Account Changed Notification* are enabled in *Admin Center* > *E-Mail Notification Template Settings*.

Context

You can use the following two types of e-mail notification templates:

- **Login Account Notification**: Use this template to inform employees of their login account information including login name and login locale.
- **Login Account Changed Notification**: Use this template to notify employees that their login accounts have been changed.

Procedure

1. Go to *Admin Center* > *Manage Login Accounts* .
2. On the *Manage Login Accounts* page, select the relevent employees and then choose *Send Email Notification*.
3. Select an e-mail template from the dropdown list and choose *OK*.

Results

The e-mail notifications are sent, and you will receive an e-mail about the notification delivery status.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
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Exporting Accounts Template [page 38]
Exporting Login Accounts [page 39]
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3.9 Updating Login Account Details

You can update details of a login account on the *Manage Login Accounts* page.

Prerequisites

You have the *Manage Login Accounts* permission from *Manage Permission Roles* > *Administrator Permissions* > *Manage User*.

Context

If you've enabled the *Login Account Notification* or the *Login Account Changed Notification* in the *E-Mail Notification Template Settings* admin tool, you can also choose to send e-mail notification to the account users after you update their account details.

Procedure

1. Go to *Admin Center* > *Manage Login Accounts*.
2. Search for a person's login account using first name, middle name, last name, username, login name, or person ID, and then choose *Edit Details*.

   The *Edit Details* popup displays.
3. Edit account details.

   You can edit login name, login method, language, and time zone.
4. Choose *Send notification to the account user* if needed.
5. Choose *OK*.

Results

You've successfully updated the details of the login account.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
Viewing Login Accounts [page 37]
Exporting Accounts Template [page 38]
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3.10 Resetting Accounts

The system locks an account when a user exceeds the number of allowable logon attempts that is set in your password policy. Once the account is locked, the user cannot log in again until admins reset the account.

Prerequisites

You have the role-based permission of *Reset User Account* under *Manage User* admin permissions.

Procedure

1. Go to *Admin Center*.
2. In the tools search field, type *Reset User Account*.
3. Search the user whose account you want to reset.

   Type the *Name*, *Username*, or *Job Code*. While you're typing, a list appears, displaying all the matching users for you to select.
4. In the search results, select the user whose account you want to reset.
5. Click *Reset Selected Users*.

Results

The account is unlocked. You can see a confirmation message at the top of the page.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
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3.11 Resetting Password of Login Accounts

You can now reset password of one or more login accounts on the *Manage Login Accounts* page.

Prerequisites

You have the *Manage Login Accounts* permission from *Manage Permission Roles* > *Administrator Permissions* > *Manage User*.

You've enabled the *Password Changed Notification* template under *Admin Center* > *Email Notification Templates Settings*.

Procedure

1. Go to *Admin Center* > *Manage Login Accounts*.
2. Search for a person's login account using first name, middle name, last name, username, login name, or person ID, and then choose *Reset Password*.

   You can reset passwords of more than one user all at once. If you reset password for a single user, you can choose to use a system-generated password or input a password directly. If you reset passwords for more than one user, you can only use system-generated passwords.

   The *Reset Password* popup displays.
3. The *Send notification to the account user* option is selected by default.

   When you reset passwords for login accounts using system-generated passwords, the *Send notification to the account user* option is selected and grayed out by default.
4. Choose *OK*.

Results

You've successfully reset the passwords of the login accounts.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
Viewing Login Accounts [page 37]
Exporting Accounts Template [page 38]
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3.12 User Login Data Purge

User Login data is purged automatically after one year.

Login records include the login details such as first login date and last login date as well as the user information (such as user ID and user name) and manager information (such as the manager's user ID and manager's user name). Login records will automatically be purged after one year. Additionally, a limit of 100,000 login audit records for a user and a limit of 50 million login audit records for all users in a company have also been defined. When one of the two limits is reached, older audit records are purged even though they were created less than a year ago. Therefore, we recommend that you perform a backup beforehand using ad hoc report.

Parent topic: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
Viewing Login Accounts [page 37]
Exporting Accounts Template [page 38]
Exporting Login Accounts [page 39]
Importing Login Accounts [page 41]
Changing Login Accounts [page 42]
Enforcing User Account Upgrade [page 43]
Sending Login Account Related E-mails [page 44]
Updating Login Account Details [page 46]
Resetting Accounts [page 47]
Resetting Password of Login Accounts [page 48]
Exporting Login Data with Table Report [page 50]
Enabling Case-Insensitive Usernames [page 52]

3.13 Exporting Login Data with Table Report

You can use Table report to export login data.

Context

For detailed steps on how to create a Table report, see Creating a Table Report.

Procedure

1. Go to *Admin Center* > *Reporting* and choose *New*.
2. Choose *Table*.
3. Select *Login Data* as the report definition type.
4. Configure the report settings as you want.

   → Recommendation

   If you want to generate a report on what data you should back up before it's purged, do as follows:

   - In the *Columns* section, choose *Total Logins* from *Employee Login Detail* as well as other columns that you want to report, for example, *User Name* (if selected, the report displays total logins per username). Then select *Group By* to define aggregates. In the *Define Aggregates* dialogue box, choose *Total Logins* as *Aggregate Column* and *COUNT* or *SUM* as *Function*.

     ⓘ Note

     Don't select both *Total Logins* and *Access Date*. Otherwise, the *Total Logins* is displayed as 1 for each row. Also, if an admin user uses APIs to log in, and *Disable API login audit data* isn't enabled in Provisioning of your system, you might see duplicate login records of the same admin user.
   - In the *Filters* section, choose *Access Date* from *Employee Login Detail* and define access date **By Rule**. You can add a rule, for example, less than "2019-06-07", to back up the login records before this date.

   → Recommendation

   If you want to back up login data before a certain date, do as follows:

   - In the *Columns* section, choose the columns that you want to report, for example, *First Name*, *Last Name*, *Access Date*, *Direct Reports*, etc.
   - In the *Filters* section, choose *Access Date* from *Employee Login Detail* and define access date **By Rule**. You can add a rule, for example, less than "2019-06-07", to back up the login records before this date.
5. Save the report and then go back to the reports list to select *Run Report*.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
Viewing Login Accounts [page 37]
Exporting Accounts Template [page 38]
Exporting Login Accounts [page 39]
Importing Login Accounts [page 41]
Changing Login Accounts [page 42]
Enforcing User Account Upgrade [page 43]
Sending Login Account Related E-mails [page 44]

3.14 Enabling Case-Insensitive Usernames

You can manage the case sensitivity of usernames in your company system. By enabling case-insensitive usernames, you can better integrate your SAP SuccessFactors system with other SAP products.

Prerequisites

Before you enable the *Enable Case-Insensitive Usernames* option, check for duplicate usernames in *Admin Center* > *Check Tool* > *System Health* > *Application* > *User Account Management* > *There are no duplicate usernames in the case-insensitive mode*.

Context

For instances that have no duplicate usernames in the case-insensitive mode, the **Enable Case-Insensitive Usernames** option has been enabled automatically in 2H 2024. If you want to allow case-insensitive usernames and have removed duplicate usernames from your company's system, follow these steps:

Procedure

1. Go to *Admin Center* > *Company System and Logo Settings*.
2. Choose *Enable Case-Insensitive Usernames*.

   > ⓘ Note
   >
   > After you enabled this admin option, this option will gray out, and you can't disable it anymore.

3. Save your changes.

Results

You've successfully enabled case-insensitive usernames.

Task overview: Managing Login Accounts [page 34]

Related Information

Differentiating Between Person, User, and Login Account [page 35]
Viewing Login Accounts [page 37]
Exporting Accounts Template [page 38]
Exporting Login Accounts [page 39]
Importing Login Accounts [page 41]
Changing Login Accounts [page 42]
Enforcing User Account Upgrade [page 43]
Sending Login Account Related E-mails [page 44]
Updating Login Account Details [page 46]
Resetting Accounts [page 47]
Resetting Password of Login Accounts [page 48]
User Login Data Purge [page 50]
Exporting Login Data with Table Report [page 50]

4 Managing Basic User Data by Using the UI

You can manage basic user information in *Manage Users*. This tool is for non Employee Central-enabled customers, where you can add users, search users, and update users one by one.

Context

If you want to make bulk changes to multiple users in one go, you can instead use the file-based import tools or the API-based methods.

About Picklists in *Manage Users*

On the *Manage Users* page, picklist options (for example, country/region and state) now display option labels along with option IDs to help you better understand and choose the options.

Please note that the *Manage Users* page displays the picklist in the same order as the picklists are configured in data model. We recommend you set the parent picklist fields on top of the child picklist fields. Make sure that the parent picklist field is visible if child picklist is configured as visible in the *Manage Users* page.

About Fields in *Manage Users*

If a field is defined in the sysVisibleUserDirectorySetting section of the Succession Data Model, the field displays on the Manage User page.

To access data model, go to *Provisioning* > *Import/Export Data Model*.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Refer to the tasks in the following topics to manage basic user data by using the UI.

4.1 Adding Users

When new employees are hired in your company, you need to add them as users in the system and add their information for future maintenance or reference.

Prerequisites

Before you begin, make sure that the following settings are done in Provisioning:

Option	Status
Effective Dated Data Platform	Disabled
Enable Administrative Domains	Disabled
Manage Users	Enabled

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Also, make sure that you have the role-based permission of *Manage Users* under *Manage User* admin permissions.

Context

- When adding a user in the system, you can choose whether to send the user a system welcome email immediately after the user is added. SAP SuccessFactors provides predefined welcome email notification templates for you to use. Or, if you want to customize the email content to meet your business needs, see Enabling and Customizing Welcome Email Template [page 64].
- The process is for systems that don't use Employee Central to manage users. Depending on whether or not you're managing users in Employee Central, you need different tools to perform the same user management task, see Choosing a Tool for User Management [page 30].

Procedure

1. Go to *Admin Center*.
2. In the tools search field, type *Manage Users*.
3. Click *Add New User*, and select *Quick Add* or *Detailed Add Users*.

Option	Description
Quick Add	Select this option if you want to fill in only the required fields of user data for new users. 1. Fill in all the blanks. Each row contains all the required information for a user. One user is created in the system immediately after you finish one row. 2. Optional: Click the *Add More Details* button to provide extra user information. 3. Click *I'm Done, Go Back to Manage Users* to finish adding users. A pop-up window appears asking whether you want to send welcome emails now. 4. Choose *Yes, Send Emails Now* or *No, Send Emails Later* accordingly.

Option	Description
Detailed Add Users	Select this option if you want to add detailed user information for new users. 1. Fill in the required fields and any additional fields in the *General Information*, *Contact Information*, and *Other Information* sections. 2. Optional: Select *Send welcome email to this new user* so a welcome email is sent immediately after the user is added to the system. You can also choose to do this later. 3. Click *Save* to create the user in the system.

> **Note**
>
> Make sure you've assigned an active manager to the new user, or filled the field as "No Manager". If the field is left empty, the user isn't able to log in to the system.

Results

The new user is also added to the *Everyone (All Employees)* default permission group in Role-Based Permissions automatically. That means the user is granted with the most basic permissions, such as permission to log in to SAP SuccessFactors. The Company Organization Chart is also be refreshed to reflect the changes shortly.

Next Steps

Sometimes you want to make further changes to new users after initially adding them, so you don't want to send welcome emails immediately. You can send them later. For more information, see Sending Welcome E-mails Manually [page 63].

4.2 Updating Users

User information might vary from time to time. For example, an employee has a new manager, or an employee leaves the organization. User information should be updated regularly in the system to reflect the latest information.

Prerequisites

You have the role-based permission of *Manage Users* under *Manage User* admin permissions.

Procedure

1. Go to *Admin Center*.
2. In the tools search field, type *Manage Users*. On this page, a list displays all the users in the system with columns of their detailed information.

> Note
>
> More columns are collapsed in the right side. If you want to see them in the user list, click ⚙ in the right of the header line, and select the columns you want to display.

3. Optional: If the list is long and you want to search the user that you need to update, choose one of the following ways:

Option	Description
Quick search	Search by using only names or usernames. Type the name or username in the search box. While you're typing, a list appears, displaying all the matching users. Select the user you want from the list.
Advanced search	Search in more fields. Click *Advanced User Search*. Fill in the fields and click *Search*.

4. Optional: You can select *Show Active users only* or *Show External 360 Rater* to control the scope of both the user list and search results.
5. Click the name of the user that you want to update.
6. Make your changes in the pop-up window.

> Note
>
> You are not allowed to change user ID or assignment ID.

7. Click *Save*.

4.3 Purging User Data

For data protection and privacy, you may be required to completely purge inactive users from your system along with all their data, based on a single, common retention time.

Context

For more information about how to do a full purge of inactive users and their data, see Purging Inactive Users and All Data.

4.4 Setting User Status to Inactive

Users in SAP SuccessFactors can have either an active or inactive status. By default, the status of all of users is set to active when they are initially added to SAP SuccessFactors. If you want to freeze a user account, you can set the user as inactive in the system.

Prerequisites

Before you use the UI-based method to deactivate a user who is a manager, you need to do a manager transfer, which forwards in-progress forms to a new manager. To set up a manager transfer, use the Automatic Manager Transfer tool in Performance Management.

Context

Setting a user as inactive means that no changes can be made to the account. You can change user status one by one using the UI, or modify multiple user statuses in a file and upload it to SAP SuccessFactors.

Procedure

- Use the UI-based method.
    a. Go to *Admin Center*.
    b. In the tools search field, type *Manage Users*.
    c. Search the user that you want to deactivate.
    d. Click the user's name. In the *Edit User* window, select *No* for the *Active* field.
    e. Click *Save* to save your change.
- Use the file-based method.
    a. Prepare your user data file and change the *Status* field to inactive in the file.
    b. Import the user data file as you would for any other data change.

    > **Note**
    >
    > If any of the deactivated users are managers, you can configure automatic manager transfer using the import options.

4.5 Enabling System E-mail Notification for a User

Enable the system e-mail notification for a user so that the user can receive relevant system e-mails on certain events or changes to their information, such as welcome messages and reset password notifications.

Prerequisites

You have the role-based permission of *Change User Email Notification* under *Manage User* admin permissions.

Procedure

1. Go to *Admin Center*.
2. In the tools search field, type *Change User Email Notification*.
3. Search the user that you want to enable the notification for.
4. Select the checkbox for e-mail notification.
5. Click *Save The Setting*.

Results

Now the user can receive system e-mails on certain events or changes to their information.

4.5.1 Configuring E-Mail Notifications

The system can send e-mail notifications to users automatically to alert them of events or changes to their information. You can select notification templates and customize them to meet your business needs.

Procedure

1. Go to *Admin Center* > *Tools Search* > *Email Notification Templates Settings*.
2. Select the e-mail notification you want to use.
3. **Optional:** Update the e-mail template content to meet your specific needs:
    - *Set Email Send Option*: This setting consolidates the related e-mails of the same type into one e-mail. For more information, see Understanding Consolidated Email Notifications [page 63].
    - *Set Email Priority*: If you select this option, the system sends e-mails with high priority.

- *Customize Settings for Form Templates*: You can enable or disable e-mail notification settings for some templates, set consolidated interval setting, and select additional recipients.
- *Email Subject*: Change the subject line of e-mail.
- *Specify Different Template for Each Form*: Change the e-mail text for a template.
- *Email Body*: Change the e-mail body.

> ⓘ Note
>
> The maximum e-mail size is 20 MB.

4. **Optional:** Set the interval for sending out consolidated e-mail. Select the default notification interval from the *Interval For Consolidated Emails (In Hours Starting From 12:00am):* dropdown list at the bottom of the *Email Template Notification* page or from the *Customize Settings for Form Templates* dialog box.
5. Save your changes.

Results

You've successfully enabled the e-mail notifications.

4.5.2 Notification Triggers

After you enabled an e-mail notification, the target recipient receives the corresponding notification sent by the system automatically on certain events. Refer to the table for what event triggers what e-mail notification in SAP SuccessFactors.

Notification	Trigger	Recipient
User Import Notification	When the *Employee Import* job completes	User who launched the *Employee Import* job
Live Profile Import Notification	When the *Import Extended User Information* job completes	User who launched the *Import Extended User Information* job
Welcome Message Notification	When a new user is added to the system	Newly added users
Welcome Message Notification with Reset Password Support	When a new user is added to the system ⓘ Note If you are adding new users via *Manage User*, *Employee Import*, or OData API in EC-off instances, make sure that this notification is enabled. Otherwise, these newly added users might not receive welcome e-mails.	Newly added users

Notification	Trigger	Recipient
Password Changed Notification	When an admin changes a user's pass-word using *Reset User Passwords* .	User
Forget Password Support Notification	When user clicks *Forgot Password*	User
Reset Password Support Notification based on Knowledge Based Authentica-tion	When user requests to reset password and *Knowledge Based Authentication* is turned on	User
Reset Password Lockout Notification	When user attempts to reset password but fails to answer security questions	User
Reset Password Successful Notification	When user resets password successfully	User
Reset Password Support Notification	When user request to reset password	User
Login Account Changed Notification	When a login account is changed	User

4.5.3 E-mail Body for Notifications

You can use the predefined e-mail body for your notifications, or customize it according to your business need. Refer to the tables for variable codes and predefined e-mail bodies, based on which you can make your own changes.

Variable Codes

In the e-mail body, you can use variable codes to encode information that is not available at the moment, for example, employee name, employee password, and login URL. When the notification is sent by the system, the variable codes are replaced by real information of the employee automatically.

Variable Code	Description
[[EMP_NAME]]	Employee name.
[[EMP_USERNAME]]	Employee username.
[[LOGIN_URL]]	The URL through which a new employee can log in to the sys-tem.
[[SIGNATURE]]	Email signature, which you can configure from *Admin Center* > *E-Mail Notification Templates* > *Email Signature*.
[[SET_PASSWORD_URL]]	The URL through which a new employee can set password when the employee logs in for the first time.
[[RESET_PASSWORD_URL]]	The URL through which an employee can reset his or her pass-word.

E-mail Bodies

You can use or customize the notifications based on the following predefined e-mail templates:

Notification Type	E-mail Body
User Import Notification	This E-mail notification cannot be customized.
Live Profile Import Notification	This E-mail notification cannot be customized.
Welcome Message Notification	Here is your Logon information - Username: [[EMP_USERNAME]] You can access the PerformanceManager at the following URL: [[LOGIN_URL]] [[SIGNATURE]]
Welcome Message Notification with Reset Password Support	Welcome to SAP SuccessFactors! Your Login Information: Username: [[EMP_USERNAME]] Please use the following URL to set your password: [[SET_PASSWORD_URL]] [[SIGNATURE]]
Password Changed Notification	Please be advised that your password for PerformanceManager has been changed. (As a reminder, your Username is: [[EMP_USERNAME]]) [[SIGNATURE]]
Forget Password Support Notification	You can access the PerformanceManager application at the following URL: [[LOGIN_URL]] This is a system-generated message through "Forget Password Support" requested by you. If you believe this is an error, please contact your support immediately.
Reset Password Support Notification based on Knowledge Based Authentication	You can reset your password at the following URL: [[RESET_PASSWORD_URL]] This is a system-generated message through "Forget Password Support" requested by you. If you believe this is an error, please contact your support immediately. [[SIGNATURE]]

Notification Type	E-mail Body
Reset Password Lockout Notification	We've noticed you recently attempted to reset your password but have failed to answer your reset password questions successfully. Please try again in 5 minutes. [[SIGNATURE]]
Reset Password Successful Notification	You have successfully updated your password. If you did not perform this request, please contact your administrator immediately. [[SIGNATURE]]

4.5.4 Understanding Consolidated Email Notifications

You can use this feature to send out consolidated notifications for the same recipient into one single email at specific time intervals.

You can configure the consolidated interval from the *Email Template Notification* page by specifying the *"Interval For Consolidated Emails (In Hours Starting From 12:00am):"* setting.

For email notifications listed on the *Email Template Notification* page that do not have the option to set up a customized interval, you can select the default interval from the *Interval For Consolidated Emails (In Hours Starting From 12:00am):* drop down menu, at the bottom of the *Email Template Notification* page.

> Note
>
> Here you are selecting the time interval (in hours). For example, if you select 6 from the dropdown menu, consolidated email notifications will be sent out every 6 hours.
>
> There's a 4,000-character limit for consolidated email notifications.

4.5.5 Sending Welcome E-mails Manually

If you didn't choose to automatically send welcome e-mails to new users when adding them in the system, you can still send welcome e-mails manually afterwards.

Prerequisites

You have the role-based permission of *Send System Message Email Notification* under *Manage User* admin permissions.

Context

Welcome e-mails usually contain login information for the first time users. You can customize the content and format of welcome e-mails to meet your business needs.

Procedure

1. Enable e-mail notification so that users can receive system e-mails. Usually, the notification is enabled by default for new users. But if you want to change the settings, see Enabling System E-mail Notification for a User [page 59].
2. Go to *Admin Center*.
3. In the tools search field, type *Send User Welcome Email*.
4. Select whether you want to send the e-mails to a user group or a single user by choosing the following options:

Option	Description
Send system message by group	The e-mail is sent to a group of people.
Send system message by user	The e-mail is sent to a single user.

5. Customize the *Email Subject* and *Email Body*. Usually, the *Email Body* contains usernames, passwords, and a link that users can use to login to SAP SuccessFactors and set their own passwords.
6. Search the group or user that you want to send the e-mail to.
7. Select the correct group or user and click *Send System Message*.

Results

When a user receives the welcome e-mail, he or she can log in to SAP SuccessFactors through the link that is provided in the e-mails.

4.5.6 Enabling and Customizing Welcome Email Template

Email notifications are sent to users automatically to alert them of events or changes to their information. You can select the notifications to send by turning each notification on or off, and customize the email template to meet your business needs.

Context

If you enable the welcome email template, welcome emails will be sent automatically to new users when they are added to the system.

Procedure

1. Go to *Admin Center*.
2. In the tools search field, type *E-mail Notification Templates Settings*.
3. Select the checkbox for *Welcome Message Notification* to turn it on.
4. Save your changes.

Results

The automatic welcome emails are turned on. Every time when a new user is added to the system, he or she will receive a welcome email automatically. However, if you choose to turn off the template, you can still send the welcome emails manually. For steps, see Sending Welcome E-mails Manually [page 63].

4.6 Resetting User Passwords as an Administrator

You can choose to reset passwords for a single user or a group of users.

Prerequisites

You have the role-based permission of *Reset User Passwords* under *Manage User* admin permissions.

Procedure

1. Go to *Admin Center* > *Reset User Passwords*.
2. Choose one of the following ways to reset passwords:

Option	Description
Reset individual user password (with supplied password)	To reset one user's password to a specific new one.
Reset individual user password	To reset one user's password to a system-generated one.
Reset group of users passwords	To reset passwords for a specific group of users to system-generated passwords at once.

3. Search the user or a specific group of users. Select the users that you want to reset passwords for.
4. Conditional: Type the new password if you're using the *Reset individual user password (with supplied password)* option.
5. Click *Reset User Passwords*.

Results

Users receive system e-mail notifications once their passwords are reset. When users log into the system, a *Password Change* window pops up, requiring users to update their passwords. Please note that in Employee Central-enabled instances, the password that gets updated is the password of the login account, and might not be the password of the main user on the home page.

If "security questions" have been enabled in the instance, users must choose security questions before they enter the new password.

Related Information

Enabling the Forget Password Function [page 68]

4.6.1 Enabling and Customizing Password Changed E-mail Template

E-mail notifications are sent to users automatically to alert them of events or changes to their information. You can select the notifications to send by turning each notification on or off, and customize the e-mail template to meet your business needs.

Context

Enable the *Password Changed Notification* in the *E-Mail Notification Templates* page in Admin Center so users can be notified when their passwords are reset by admins. For more information, see Configuring E-Mail Notifications [page 59].

4.7 Resetting Passwords as a User

Sometimes users might forget their passwords and can’t log in to SAP SuccessFactors, so they need to reset passwords. You can either allow users to reset their own passwords or you reset their passwords in *Admin Center* on request.

Allowing Users to Reset Their Own Passwords [page 67]
It is convenient if users can reset their own passwords whenever they forget them. The system can generate a new temporary password when users retrieve a forgotten password.

Enabling and Customizing Reset Password E-mail Template [page 67]

E-mail notifications are sent to users automatically to alert them of events or changes to their information. You can select the notifications to send by turning each notification on or off, and customize the e-mail template to meet your business needs.

Enabling the Forget Password Function [page 68]
If you want to allow users to reset their own passwords, you can enable this function by updating your company password policy.

4.7.1 Allowing Users to Reset Their Own Passwords

It is convenient if users can reset their own passwords whenever they forget them. The system can generate a new temporary password when users retrieve a forgotten password.

Context

To allow users to reset their own passwords, you need to first enable the forget password function in the company password policy. Then, turn on the system email notification so users can receive retrieving password emails sent by the system. You can also customize the email template to meet your business needs.

4.7.2 Enabling and Customizing Reset Password E-mail Template

E-mail notifications are sent to users automatically to alert them of events or changes to their information. You can select the notifications to send by turning each notification on or off, and customize the e-mail template to meet your business needs.

Context

Enable the *Reset Password Successful Notification* in the *E-Mail Notification Templates* page in Admin Center so users can receive retrieving password e-mails after they reset their passwords. You can also customize the e-mail template if needed. For more information, see Configuring E-Mail Notifications [page 59].

4.7.3 Enabling the Forget Password Function

If you want to allow users to reset their own passwords, you can enable this function by updating your company password policy.

Procedure

1. Go to *Admin Center*.
2. In the tools search field, type *Password & Login Policy Settings*.
3. Select *Enable Forget Password feature*, and choose one of the following options:

Option	Description
Reset Password using a URL accessed through an email link	The user receives a system email containing a link through which they can reset the password.
Reset passwords using security questions accessed through email link	The user receives a system email containing a link where the user must answer security questions correctly before resetting the password.
Reset passwords using security questions accessed through the system	The user is redirected to the security question page where the user must answer correctly before resetting the password.

4. Click *Set Password & Login Policy* to save your changes.

   For more information about password settings, see Configuring Password and Login Policy [page 68].

4.8 Configuring Password and Login Policy

You can configure user management-related password and login policy settings for your company by using the *Password & Login Policy Settings* admin tool.

Prerequisites

You have the *Manage System Properties* > *Password & Login Policy Settings* permission.

Procedure

1. Go to *Admin Center* > *Company Settings* > *Password & Login Policy Settings*.
2. Select from below options.

Options	Descriptions
Minimum Length Maximum Length	Enter at least 6 in these two fields.
Minimum Password Age (in days) Maximum Password Age (in days)	**Note** *Minimum Password Age (in days)* controls when password can be changed again based on the latest password change, preventing users from changing password too frequently. *Maximum Password Age (in days)* controls how frequently the passwords can be changed. If you enter a valid number of days in the maximum field, for example, 60, the system notifies all users to change their passwords every 60 days and apply the validity period to the new passwords. If you want to disable the two features, enter "-1" in the fields. Every time you change this value from -1 to a value larger than 0, or change it back to -1, users are asked for password reset upon their next login. However, simply extending or reducing the period (from 10 to 50 or 30 to 10, for example) can't force the users to change their password.
Set API login exceptions...	**Note** You can set different maximum password ages for API users in the *Set API login exceptions* section. If the maximum password age of API users is larger than that of login users, when the API user logs in the system after the login password expires, a warning message displays to inform the API user to update password. It's not recommended but API users can dismiss the warning message and continue to log in the system with API until the expiration of the API maximum password age.
Maximum Successive Failed Login Attempts	Set to 0 to disable this option. The system locks a user account if successive failed login attempts exceed what the policy allows, within a 1-minute period.
Case Sensitive (recommended)	If this option isn't checked, upper case characters and lower case character are considered as one type of characters.
Mixed Case required	If this option is checked, the password must contain both upper case characters and lower case characters. This option is ignored if Case Sensitive isn't checked.
Alpha characters required	If this option is checked, the password must contain upper case characters, lower case characters, or both.

Options	Descriptions
Nonalpha characters required	If this option is checked, the password must contain numeric characters, special characters, or both.
Password can't contain any of the following user information: First Name Last Name Username	
Enable password history policy	History policy rejects passwords that are identical to a recently used password. Enter a number from 2 through 10.
Enforce Password Encryption	Turning this option OFF from ON forces all users to change their passwords. Turning this option ON disables the Forgot Your Password feature for password retrieval through emails.
Enable Forget Password feature Reset Password using a URL accessed through an email link Reset passwords using security questions accessed through email link Reset passwords using security questions accessed through the system	Use this option to enable the forget password feature. Specify detailed forget password settings. Please note that the URL link expires in 30 minutes.
Enable Forgot Username feature	Allows users to retrieve their username by having it sent to their email address.
Set Expiration of Password Link in Welcome Emails (in days)	Expiration can be up to 30 days, please enter a value from 1 through 30. Changing this setting affects all links that have yet to expire. Please note that this setting only impacts the password resetting link in the welcome emails.
Password Expiration for Long-Time Unused Passwords (in years)	This option is to expire passwords that haven't been used to log in the system longer than the number of years that you select from the dropdown. To disable this option, choose N/A.
Enable CAPTCHA for the Forgot Password page	You can specify how many consecutive attempts of sending resetting password emails from the Forgot Password page are allowed within 1 minute before the system prompts a CAPTCHA. To disable this option, choose N/A from the dropdown.

3. Save your changes.

4.8.1 Password Policy Settings and Predefined Passwords

To better protect your account security, we now provide a set of best practices of password policy settings.

As an admin user, you can check the new password policy settings through *Admin Center* > *Company Settings* > *Password & Login Policy Settings*. We recommend that you adopt the following password policy settings.

- Enter at least 6 in the *Minimum Length* and the *Maximum Length* fields.

- The password must contain at least two kinds of the following characters: numeric character, special character, upper case characters, or lower case characters.
- Enter a number larger than 0 in the *Maximum Successive Failed Login Attempts* field.
- Enter at least 2 in the *Enable password history policy* field.
- Enter a number between 1–365 in the *Maximum Password Age (in days)* field.

As an admin user, if you predefine passwords for users in the import user file using Employee Import, Bulk Employees Import, and Delta Employees Import, ensure that the passwords comply with password policy settings. If not, you receive warnings in the import status email.

As an end user, if your password is predefined by your system admin using Employee Import, Bulk Employees Import, and Delta Employees Import, you must reset your password when you log in the system for the first time. You can follow the steps in the reset password popup to reset your password. When you change your password, the existing behavior is that the system checks whether your new password is compliant with password policy settings.

4.8.2 Important Notes on Default Password Option

Using username, user ID, or email as default password introduce security risks. Starting from June 19, 2020, you can't use username, user ID, or email as default password when creating new jobs in Employee Import, Bulk Employees Import, or Delta Employees Import, or adding new users in Manage Users. The import jobs that you submitted prior to this date aren't affected.

Functionality Impacted

- The *Employee Import* tool that is placed in both *Admin Center* of the instances that haven't enabled Employee Central and the *Manage Scheduled Job* page in Provisioning.
- The *Bulk Employees Import* tool that is placed in the *Manage Scheduled Job* page in Provisioning
- The *Delta Employees Import* that is placed in the *Manage Scheduled Job* page in Provisioning
- The *Manage Users* tool in *Admin Center*

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Users Impacted

This affects users created by *Employee Import*, *Bulk Employees Import*, *Delta Employees Import*, and *Manage Users* and using SAP SuccessFactors password authentication. Integrated external learners, onboardees, and users using SSO authentication aren't impacted.

ⓘ Note

In instances that have been migrated to SAP Identity Authentication Service（IAS), the password policies are handled within IAS and SAP SuccessFactors policies aren't relevant.

What's the Specific Product Behavior Change About Default Password After June 19, 2020 ?

- Before June 19, 2020, you could specify username, user ID, email, or "System Generated" as the default password for new users when creating new jobs in *Employee Import*, *Bulk Employees Import*, or *Delta Employees Import*.
  After June 19, 2020, to improve security, when creating **new** jobs， you can only use "System generated" as default password, and the username, user ID, email options aren't supported anymore. However, the **submitted** jobs that you created through *Provisioning* > *Manage Scheduled Job* prior to June 19, 2020 aren't affected, regardless of whether you specified username, user ID, email, or "System generated" as the default password option. For better security, we recommend that you enable *Use System Generated Password by Default* in *Admin Center* > *Platform Feature Settings* to override the default password settings to be "System Generated" in all import jobs created through Provisioning.
- Before June 19, 2020, if you created new users in *Manage Users*, username was the default password for new users. After June 19, 2020, "System generated" becomes the default password option.

What You Need to Do

With "System generated" as the default password option, how to ensure that new users can reset password using emails.

If you're creating new jobs in Employee Import, Bulk Employees Import, or Delta Employees Import, or adding new users in Manage Users, be aware that only "System generated" is supported as the default password option after June 19, 2020. To ensure that new users can reset password using a link in an email, perform the following steps:

Prerequisites: New users have a valid email address and can receive email notifications.

1. Enable the *Welcome Message Notification with Reset Password Support* template in *Admin Center* > *E-mail Notification Template Settings*.
2. Select the *Send Welcome Message to New Users* option in the *Employee Import*, *Bulk Employees Import*, or *Delta Employees Import* in Provisioning or select *Send welcome email to new users* in *Manage Users* pages.

Result: New users will receive a welcome email containing the Set Password link after the import job completes.

(Not recommended) Set initial password for new users in import file if they can't receive emails.

If your users don't have a valid email address or can't receive email notifications, you might consider the following workaround:

1. Add a "PASSWORD" column (column heading: PASSWORD; column label: PASSWORD) in the import file and then provide valid passwords for new users in the column.

2. Select *Use a system generated random password* as the default password in *Employee Import* in *Admin Center*.
3. Import your file.
4. Inform new users their initial passwords offline.

> **Caution**
>
> For better security, ask your users to reset passwords after first-time login.

How to change the existing password settings to be "System generated" in the submitted import jobs.

If the submitted jobs that you created before June 19, 2020 in *Provisioning* > *Manage Scheduled Job* specify username, user ID, or email as the default password, then to improve security, you're recommended to change the password setting to be "System Generated" for the submitted jobs and then update the email settings if necessary to ensure that new users can reset password using a link in an email.

1. Go to *Admin Center* > *Platform Feature Settings* and enable the *Use System Generated Password by Default* option to override the existing password setting to be "System Generated".
2. If the *Send Welcome Message to New Users* option isn't selected in the submitted jobs, then you should go to *Admin Center* > *Platform Feature Settings* and enable the *Send Welcome Message* option to override the existing welcome email setting to be "enabled".

   > **Note**
   >
   > Once the *Use System Generated Password by Default* and *Send Welcome Message* options are selected, the default password and welcome message configuration in the new and existing import jobs are "System Generated"and "enabled" respectively.
3. Enable the *Welcome Message Notification with Reset Password Support* template in *Admin Center* > *E-mail Notification Template Settings*.

Notes

> **→ Recommendation**
>
> We recommend that you review the internal communication process about new account creation in your company, for example, how to inform new employees of their initial login passwords, and then update it if necessary.

If your SAP SuccessFactors system has integrated with third-party applications using a default password that is specified as username/userid/email, we recommend you to change this kind of integration because of security risk. You can use a password that isn't the same as username/userid/email in the import file for integration.

If some users were created with username/userid/email as the default password and use these passwords for login, ask them to reset their passwords as soon as possible using one of the following three methods:

- Users can reset passwords themselves by using the set password link (valid in 1-30 days, according to your company-level password policy setting) in the welcome email notification
- Users can reset passwords themselves by navigating to *Options* > *Password* in the system

- Admins can reset password for these users using *Admin Center* > *Reset User Passwords* and deliver new passwords to users offline. See the Related Links section on how to reset user passwords.
  Password Changed Notifications with a set password link will be sent to users when the Password Changed email notification with the [[SET_PASSWORD_URL]] token has been enabled in *E-mail Notification Template Settings* and the option of user email notification is turned on in *Admin Center* > *Change User Email Notification*.

Related Information

Enabling the Forget Password Function [page 68]
Resetting User Passwords as an Administrator [page 65]

4.9 Hiding Usernames in the UI

You can hide usernames in the UI, including Global Header, quickcard, org charts, people profile, and Change Audit reports.

Prerequisites

You have the *Administrator* > *Manage System Properties* > *Platform Feature Settings* permission.

Procedure

1. Go to *Admin Center* > *Platform Feature Settings*.
2. Select *Hide Usernames in the UI*.
3. Save your changes.

Results

You've hidden usernames in the UI.

4.9.1 User Interfaces Where You Can and Cannot Hide the Username

You can enable the *Hide Username in the UI* feature to hide username on the Global Header and the employee quickcard as well as the search user interfaces that have adopted People Search.

User interfaces that are affected by the *Hide Username in the UI* option

By default, this option is off. Once you enable it, the username will be hidden on the **Global Header** and **employee quickcard**, and you cannot run a username search or see username in the search results in **the following search interfaces**:

- Global Header Search
- Org Chart people Search, including Position Org Chart Search, Directory Search, Succession Org Chart Search, and Succession Lineage Chart/ Talent Search
- Employee Profile People Search
- People Search in *Manage Users*
- People Search for manager field.
  In Employee Central-enabled instances, if administrators want to add or update user's managers (such as manager, HR manager, matrix/custom/proxy/second managers and so on.) from People Profile blocks (for example, Employee Information, Job Relationships) or use *Add New Employee* to hire new employee, then username will be hidden.
- Person Search in **Change Audit Report**
- Person Search in **Data Subject Information**
- People Search in *Check Tool*
- People Search in *Manage Workflow Requests*
- People Search in *Manage Login Accounts*
- People Search in the *Proxy Now* dialog for the User Proxy feature

> ⓘ Note
>
> In all the above search interfaces except the Person Search in **Data Subject Information**, user cannot be searched by username unless their username is the same as user ID. In Person Search in **Data Subject Information**, however, user cannot be searched out by username even though their username is the same as user ID.

User interfaces that are NOT affected by the *Hide Username in the UI* option

The following interfaces aren't affected by the *Hide Username in the UI* option, and administrators can continue using username to search for users even though this option is enabled. .

- Search interfaces in the following admin tools : Reset User Account, Reset User Passwords, Send User Welcome Email, Change Email Notification Setting, Manage Support Access, Manage Permission Group, Manage Role-Based Permission Access, Manage Employee Group, User Role Search, View User Permission,

Proxy Management, Advanced Search in Manage Users, Data Retention Management, Rehire Inactive Employee, and others.
- Standard Element “Username” on *People Profile*: If customer configure standard-element “Username” as a field on *People Profile*, username is displayed, regardless of whether this option is on or off.

4.10 Configuring General Display Name

General Display Name ensures the consistent display of employee name across SAP SuccessFactors HCM suite. To make sure that employees' names are shown in a format that suits your company's need, you can follow the below steps to define and configure the specific name format.

Prerequisites

You've read Important Notes About General Display Name Adoption [page 78] and understand where the general display name is applied or not.

Context

- The setting *Enable adoption of General Display Name* in *Admin Center* > *Company System and Logo Settings* is automatically on and cannot be disabled.
- A standard element, displayName, is used to store General Display Name. This element is always readable. Please note that it can't be seen or configured in the Succession Data Model, nor can it be modified in *Manage Business Configuration*.
- Initially, if you haven't defined and configured any name format for General Display Name, the field is prepopulated with full name. Full name is a combination of first name, middle name, and last name. Its name format is determined by the default locale. If an employee has no full name, the value *Unknown* is populated.
- For Employee Central customers, the data is updated by HRIS Sync. If Employee Central is NOT enabled in your instance, you can update General Display Name using Employee Import. We do NOT recommend Employee Central customers to update the field value through import, because the updates will be overwritten by HRIS sync or when you refresh the general display name. For more information about choosing a proper tool for updating user data, refer to the *Related Information*.

Procedure

1. Defining a Name Format [page 91].
2. Choose from the below two methods to configure the name format.
    - Configuring the Name Format for Legal Entities [page 92]

- Configuring the Name Format for People Profile [page 93]

3. Decide whether to enable the *Admin Center* > *Company System and Logo Settings* > *Enable the name format selected in Configure People Profile to apply globally* option if you've configured a name format for People Profile.
    - Enable the option if you expect to have a global name format for all legal entities.
    - Don't enable the option if you need to configure different name formats for different legal entities.

    > Note
    >
    > With the option unchecked, only the legal entities where no name format for general display is specified share the format selected for People Profile.

4. Refreshing General Display Name [page 94].

Results

You've defined and configured different name formats for general display name in different legal entities, or a single name format to be used across the company.

Important Notes About General Display Name Adoption [page 78]
  Before you start using General Display Name, understand the following important notes and how they impact your SAP SuccessFactors system.

Defining a Name Format [page 91]
  You can define a name format to be used for General Display Name in a legal entity or in People Profile. Depending on your business needs, you can define a single name format applied across the company, or define different name formats for different legal entities.

Configuring the Name Format for Legal Entities [page 92]
  After defining a name format of the General Display Name, you can now configure the name format using the *Manage Data* admin tool for a legal entity.

Configuring the Name Format for People Profile [page 93]
  After defining a name format of the General Display Name, you can now configure the name format using the *Configure People Profile* admin tool for People Profile.

Refreshing General Display Name [page 94]
  Employee Central customers who have updated configurations of general display name, for example, by changing the legal entity or the name format, must refresh general display name to trigger changes to the general display name.

Related Information

Choosing a Tool for User Management [page 30]
Field Requirements for the User Data File [page 104]

4.10.1 Important Notes About General Display Name Adoption

Before you start using General Display Name, understand the following important notes and how they impact your SAP SuccessFactors system.

Modules That Support the General Display Name

Here's a table of modules and features that partially support General Display Name (with limitations) or fully support General Display Name but require your extra attention (with notes). For example, Career Development supports General Display Name, but legacy development goals don't. Please note that it's **NOT** a full list of modules and features that support General Display Name.

Module	Feature	Notes and Limitations
Employee Central	Hire	To uniquely identify a hire or rehire, we use legal name instead of General Display Name in the following UIs: • Add New Employee - Confirmation • Add New Employee - Match Pop-Up • Rehire Inactive Employee
Employee Central	Pending Hires	In the Manage Pending Hires tool, we show the name format configured by you for candidate name when configuring columns for the tool. When hiring using the tool, if the General Display Name isn't the same as the *Name* on the main screen, on the screens for Internal Hire, Global Assignment, Concurrent Employment, we display the General Display Name in after the *Name*. Other name columns such as HR Manager support the General Display Name.
Employee Central	Workflows	When a new employee is added triggering a new hire workflow, the new employee's name won't be displayed in the format of General Display Name on all UIs where that workflow is shown, including *My Workflow Requests*, *Workflow Details*, *Take Action*, cards on the home page, and email notifications.

Module	Feature	Notes and Limitations

Onboarding	Onboarding
	Offboarding
		Onboarding, *Internal Hire*, and *Offboarding* pages all support General Display Name. Full name token in email notifications supports General Display Name as well. Only in the following situations General Display Name isn't supported:
		• We use legal name instead of General Display Name in Compliance Forms
		• The format of names in documents generated by Print Form Services depends on the field mapping.
		• On the first rehire verification page:
		  • Both General Display Name and legal name are shown for the new hire's hiring manager, where the legal name is in brackets.
		    Note
		    If the General Display Name and legal name are the same, only the General Display Name is shown.
		  • Legal name is shown in the page title for the new hire.
		• On the second rehire verification page:
		  • Both General Display Name and legal name are shown for the new hire in the page title and the new hiring manager, where the legal name is in brackets.
		    Note
		    If the General Display Name and legal name are the same, only the General Display Name is shown.
		  • All names in the matching profiles are legal names.

Module	Feature	Notes and Limitations
Platform	Employee Profile	All names in People Profile can be shown in the format of General Display Name, for example, names in the latest People Profile Preview and Legacy People Profile header. If you're using the latest People Profile, the `<Display Name>` field is by default shown on the Employee Information card. You can't change its visibility. If you're using the legacy People Profile, to have the field shown in a Live Profile User Information block, you can use the *Configure People Profile* admin tool to add the field to the block.

Module	Feature	Notes and Limitations

Platform	Home Page	Home page cards don't always immediately reflect changes to a person's general display name.
		• For cards that were generated **before** the 2H 2022 release, the name on the card doesn't change, even if General Display Name is enabled and a person changes their name. Cards always show the person's name at the time the card was generated. You need to wait for older cards to expire.
		• For cards that are generated **after** the 2H 2022 release, the general display name is supported in **most** places. When General Display Name is enabled and a person changes their name, the name on the card is updated. However, it can take up to an hour for the change to appear.
		• In **some** places where names appear on home page cards, the General Display Name isn't supported yet. In these places, cards always show the person's name at the time the card was generated, whether it was before or after the 2H 2022 release. You need to wait for these cards to expire. These places include:
		  ◦ Employee Central workflow cards
		  ◦ Job Offer and Job Requisition approval cards (for Recruiting)

Platform	Manage Documents	The *Uploaded By* and *Document Owner* fields will show the General Display Name.

Module	Feature	Notes and Limitations
Platform	Metadata Framework	All names in Metadata Framework can be displayed in the format of General Display Name, including: • Values for any user-type fields, including dropdown values, search results, and strikethrough values • Audit information including "last modified by" and "created by" in *Manage Data*, *Configure Object Definitions*, and *Picklist Center* pages. General Display Name will also appear in any application that uses an MDF object with a user-type field.
Platform	Search Users	The common find user widget displays first name, last name, and user name. General DIsplay Name will not be displayed. Go to *Admin Center* > *Reset User Passwords* to see an example of the find user widget.
Platform	Work Zone Content	All names in the HR content package, which includes cards and Guided Experiences, in SAP SuccessFactors Work Zone are displayed in the General Display Name format.
Recruiting	Candidate Relationship Management (CRM)	Applies to email campaigns, message center, and talent pools.
Recruiting	Interview Central	Includes email tokens for all operators names (recruiter name, hiring manager name, interviewer name, and so on).
Recruiting	Interview Scheduling	Includes My Calendar, Interview Setup portlet, Scheduling Overview page and email notifications.

Module	Feature	Notes and Limitations
Recruiting	Job Applications	Includes the applicant workbench; the job application details page with Jobs Applied, Application Status Audit Trail, Comment, and Correspondence portlets; Actions (Forward to Colleague, Forward to Requisition, and so on); Email tokens; Print Preview. The internal candidate name on the job application details page → Applicant Profile Header is displayed in **DisplayName (Internal Candidate) (ApplicantName)** format.
Recruiting	Offer Approvals Offer Letters	Includes the offer approval list, offer approval details, mass offer approvals, mass offer details, offer approver search, offer letter user search in CC and BCC email, the author name in the offer letter portlet, and tokens that display recruiter and hiring manager names in the offer letter to the candidate. Internal candidate names in the list of offer approvals being reassigned through the *Reassign Offer Approvals* page. External candidates continue to display their legal or formal name.
Recruiting	Job Postings	• The *Job Posting Report* and the *Job Status Report* in *Admin Center* > *My Reports* > *Manage My Reports* shows the individual's display name rather than the legal or formal name. • Posting profile and Groups • Users to Posting profile Association
Recruiting	Job Requisitions	In the *Job Requisition Change history* (Job Requisition field Audit), the records created for the change history before you enabled the Enable Adoption of general display name option will still display the legal name. Only the records created after enabling the Enable Adoption of general display name option will adopt the display name.

Module	Feature	Notes and Limitations
Recruiting	Job Requisitions Candidate Profile Candidate Relationship Management (CRM) Offer Approvals Offer Letters	This section lists the common areas in Recruiting that do not support display name, or the behavior is different for the display name changes: • Adhoc reports do not support the General Display Name. • The email templates created before enabling the *Enable adoption of General Display Name* option, the *CC* and *BCC* fields will not resolve the display name for the *By Employee name* option. So, you need to resave the email template to view the display name. • The external candidate name does not adopt the General Display Name. • In talent pools, you can search for people by their General Display Name when adding them to the Shared list, but the General Display Name isn't supported in the *Search for First Name in Shared List* and *Search for Last Name in Shared List* fields when looking for those who are already on the Shared list. • The Search field in the Message Center doesn't support General Display Name. • When creating new email campaigns, the *Search First Name* and *Search Last Name* fields in the *Manually Added Recipients* dialog for candidates don't support General Display Name.

<table>
<tr><th>Module</th><th>Feature</th><th>Notes and Limitations</th></tr>
<tr><td>Recruiting</td><td>Candidate Profile</td><td>Includes candidate profile record, candidate search results, application record pages, candidate summary page, Referral Tracking, Resume Viewer, and Email tokens.
The following portlets display General Display Name on Candidate Profile:
Correspondence
Talent pool
Email Campaign
Employee Referral Information
Comments</td></tr>
<tr><td>Recruiting</td><td>Job Requisitions
Candidate Profile</td><td>This following Admin Center pages display the General Display Name:
Delete Candidate
Restore Deleted Job Requisitions
Reassign Job Requisitions
Mass Delete of Job Requisitions</td></tr>
<tr><td>Employee Central</td><td>Position Management</td><td>With the adoption of the General Display Name, your employees' names are no longer sorted by surname, name. Your employees' names are sorted depending on the name format you've configured.</td></tr>
</table>

Module	Feature	Notes and Limitations
Performance Management	Performance Management	The following lists the notes and limitations of the General Display Name in Performance Management: • If users have recalled feedback for a form before you enable the General Display Name, *Recalled by <user's name>* in the *Comments* column of the form's *Audit Trail* table doesn't show users' display name. • If *Enable form title editability in the Form* or *Enable form title editability in Form info page* in *Form Template Settings* is selected, form titles don't show users' display name for forms launched before you enable the General Display Name. Users can edit form titles as they want. For forms launched after you enable the General Display Name, if users' display name is changed, form titles are not updated automatically. • For forms launched before you enable the General Display Name, the manager, HR manager, second manager, matrix manager, and custom manager fields in the employee information section don't show users' display name. When forms are saved, users' name is updated to display name. Forms in en route and completed folders are not updated. • For forms launched before you enable the General Display Name, form titles in the *Document List* section on the form history page, OData APIs, Data Subject Information Report, and all types of reports in People Analytics don't show users' display name. When forms are saved, users' name is updated to display name. • The *Employee* column in the *Audit Trail* table in *Story* reports remains showing users' full name. You can use the new join relations between

Module	Feature	Notes and Limitations
		the *Audit Trail* and *User* tables, *Step Owner* and *Proxy User of Step Owner*, to report users' display name.
360 Reviews	360 Reviews	360 Reviews admin tools haven't yet supported showing the General Display Name. The following lists the notes and limitations of the General Display Name in 360 Reviews: • If *Enable form title editability in the Form* or *Enable form title editability in Form info page* in *Form Template Settings* is selected, form titles don't show users' display name. Users can edit form titles as they want. • For forms launched before you enable the General Display Name, the form titles in Table reports or People Analytics reports don't show users' display name. When forms are saved, users' name is updated to display name.
Analytics	Report Center	All the pages in *Report Center* (including the sub-pages) that display <*First Name*> <*Last Name*> have been updated to display the General Display Name. **Note** Currently, the search functionality in *Report Center* doesn't support the adoption of General Display Name.
Analytics	Story Reports	The *Basic User Information* table in *User* schema has been updated with the *General Display Name* field that enables you to use the General Display Name of employees in all Story reports.

Module	Feature	Notes and Limitations
Analytics	Canvas Reports	The *General Display Name* field is available only in the following schemas of the *Detailed Reporting* data source for *Canvas* reports: • Job Information (Date Range) • Recurring Compensation Information (Date Range) • Job Information (Date Range) • Person and Employment Info (as of Date) • Person and Employment Audit • Person and Employment Export • Non-Recurring Compensation (Date Range) The *General Display Name* field is available only in the following realms of the *Advanced Reporting* data source for *Canvas* reports: • HR Manager Info • Matrix Manager Info • User Sys Info
Analytics	Table Reports	The *General Display Name* field is available only in the following domains of *Table* reports: • Job Information (Date Range) • Recurring Compensation Information (Date Range) • Job Information (Date Range) • Person and Employment Info (as of Date) • Person and Employment Audit • Person and Employment Export • Non-Recurring Compensation (Date Range)
Analytics	Workforce Analytics	The *General Display Name* field has been adopted only in: • HR Manager Info • Matrix Manager Info • User Sys Info

Module	Feature	Notes and Limitations
Analytics	Classic Reports	The following columns about Performance Management forms in *Overdue Document*, *Detailed Document Search*, and *Deactivated User Inboxes* reports under *Classic Reporting* support showing the General Display Name: • Title • Originator • Employee
Learning	Course Home	Applicable for learners.
Learning	Learning History	Applicable for learners.
Learning	Certificate of Completion	Applicable for learners.
Learning	Learning Plan	Applicable for learners.
Learning	My Team	Applicable for supervisors.
Learning	Action on Reportees	Applicable for supervisors.
Learning	Manage User Learning	Applicable for administrators.
Learning	Manage Learning Activities	Applicable for administrators.
Learning	Manage People	Applicable for administrators.
Learning	Curricula	Applicable for administrators.
Learning	Libraries	Applicable for administrators.
Learning	User	Applicable for administrators.
Learning	Manage Classes	Applicable for instructors.
Learning	Approval Process	Applicable for administrators.
Career Development	Development Objectives Career Explorer	Legacy development goals don't support General Display Name. If you enable Career Explorer, the first card on the Career Explorer page that contains user information don't show users' display name immediately until cache is finished. Cache is refreshed per two hours.
Employee Central	Business Configuration	The *Changed by* and *Updated by* columns show the General Display Name.

<table>
<tr><th>Module</th><th>Feature</th><th>Notes and Limitations</th></tr>
<tr><td>Time Tracking</td><td>Clock In Clock Out</td><td>The General Display Name is supported in the following pages:

Note

If the logged in user does not have the target population permission for the user who has created or last modified the time event, the rows for general display name will appear blank and show only the timestamp.

• Manage Clock In Clock Out - Employee Name, Created By, and Last Modified By columns show the general display name.
• Configure Clock In Clock Out - The Created By and Last Modified By columns for both Time Event Types and Clock In Clock Out Groups.</td></tr>
<tr><td>Goal Management</td><td>Goal Management</td><td>General Display Name isn't supported in legacy Goal Management.</td></tr>
</table>

Modules That Don't Support General Display Name

Here's a table of modules and features that don't support General Display Name. If a module isn't listed in the table, it supports General Display Name fully or partially.

Module
Onboarding 1.0
Employee Central Service Center

Parent topic: Configuring General Display Name [page 76]

Related Information

Defining a Name Format [page 91]
Configuring the Name Format for Legal Entities [page 92]
Configuring the Name Format for People Profile [page 93]
Refreshing General Display Name [page 94]
General Display Name Implementation in Learning

4.10.2 Defining a Name Format

You can define a name format to be used for General Display Name in a legal entity or in People Profile. Depending on your business needs, you can define a single name format applied across the company, or define different name formats for different legal entities.

Prerequisites

When General Display Name is enabled, the *Visibility* field of the *Admin Center* > *Configure Object Definitions* > *Legal Entity* > *DisplayNameFormat* > *toDisplayNameFormat* attribute is set to *Editable*. Don't modify this field value.

Context

With the General Display Name feature, it's now possible to define different name formats to better reflect how names are used across the global regions. Please be aware that some screens show names of employees from different regions, and therefore with different name formats. To help end users better differentiate what part of the display name is the first name and what part is the last name, we recommend that you use separators or capitalization. Here are some examples:

- If you configure a name format with Last Name followed by First Name, then separate them with a comma. The result could be the following:
  - Alex Thompson
  - Grant, Carla

  With that, users can see that either the first part "Alex" is the first name or the part after the comma "Carla". To configure separators, see details in Visualizing the Editable Separator for Name Formats.
- Always have the last name in capital letters. The result could be the following:
  - Alex THOMPSON
  - GRANT Carla

  With that, user can see that "Alex" and "Carla" are the two first names, even if displayed in different ways.

For name format of locales other than EN_US, please use the customization options to do what's appropriate for your target locale.

Procedure

1. Go to *Admin Center* > *Manage Data*.
2. Input **`Name Format`** in the *Create New* field.
3. Enter the details of your chosen name format in the *Name Format Code*, *Name Format Description*, *Name Element* and *Alternative Name Element* fields.

→ Recommendation

When defining the name format for the General Display Name, we recommend that you select Preferred Name as the name element.

4. Save your changes.

Task overview: Configuring General Display Name [page 76]

Related Information

Important Notes About General Display Name Adoption [page 78]
Configuring the Name Format for Legal Entities [page 92]
Configuring the Name Format for People Profile [page 93]
Refreshing General Display Name [page 94]

4.10.3 Configuring the Name Format for Legal Entities

After defining a name format of the General Display Name, you can now configure the name format using the *Manage Data* admin tool for a legal entity.

Procedure

1. Go to *Admin Center* > *Manage Data*.
2. Search and choose a legal entity that you want to assign the name format you prepared.
3. In the *Name Format for General Display* dropdown, select the name format you've prepared.
4. Save your change.

Results

You've configured a name format of General Display Name for the legal entity.

Task overview: Configuring General Display Name [page 76]

Related Information

Important Notes About General Display Name Adoption [page 78]
Defining a Name Format [page 91]
Configuring the Name Format for People Profile [page 93]
Refreshing General Display Name [page 94]

4.10.4 Configuring the Name Format for People Profile

After defining a name format of the General Display Name, you can now configure the name format using the *Configure People Profile* admin tool for People Profile.

Context

If you enable the *Admin Center* > *Company System and Logo Settings* > *Enable the name format selected in Configure People Profile to apply globally* option, the system will use the name format configured for People Profile for all legal entities, though you've configured a specific name format for general display in certain legal entities.

Procedure

1. Go to *Admin Center* > *Configure People Profile* > *General Settings* > *Choose Name Format*.
2. Select the name format you've prepared.
3. Save your change.

Results

You've configured a name format of General Display Name for People Profile.

Task overview: Configuring General Display Name [page 76]

Related Information

Important Notes About General Display Name Adoption [page 78]
Defining a Name Format [page 91]

Configuring the Name Format for Legal Entities [page 92]
Refreshing General Display Name [page 94]

4.10.5 Refreshing General Display Name

Employee Central customers who have updated configurations of general display name, for example, by changing the legal entity or the name format, must refresh general display name to trigger changes to the general display name.

Prerequisites

- You have the *Administrator Permissions* > *Manage System Properties* > *Company System and Logo Settings* permission.
- You've configured a name format with Legal Entity or People Profile.

Context

This task is for Employee Central customers only. Customers who haven't enabled Employee Central don't need to refresh the general display name and won't see the *Refresh General Display Name* button.

Procedure

1. Go to *Admin Center* > *Company System and Logo Settings*.
2. Click the *Refresh General Display Name* button right under the *Enable adoption of General Display Name* option.

Results

You've successfully triggered the refresh of the general display name. An HRIS sync job is triggered. You can check the job status under *Admin Center* > *Scheduled Job Manager*.

Task overview: Configuring General Display Name [page 76]

Related Information

Important Notes About General Display Name Adoption [page 78]
Defining a Name Format [page 91]
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Configuring the Name Format for People Profile [page 93]

4.11 Enabling Pronouns

Pronouns like "she/her/her" are more and more used as designations in emails and profiles. To enable pronouns, you need to configure a `PersonPronouns` picklist.

Prerequisites

- You have the *Administrator Permissions* > *Metadata Framework* > *Configure Object Definitions* permission.
- You have the *Administrator Permissions* > *Manage System Properties* > *Configure People Profile* permission.
- You have configured the `pronouns` standard element in Succession Data Model or *Manage Business Configuration*.

Procedure

1. Go to *Admin Center* > *Picklist Center*.
2. Click the + *add* icon to create a picklist for pronoun.
3. Enter the picklist data.

   The value for the *Code* field must be `PersonPronouns`.
4. Use the + *add* to create a new picklist value.

   The *Add New Value* window is displayed.
5. Enter picklist values.
6. Save your changes.

Next Steps

To display pronouns on the legacy People Profile and quickcards, you also need to enable the *Admin Center* > *Configure People Profile* > *General Settings* > *Allow employees to maintain their pronouns* option. If you are using the latest People Profile, pronouns are by default shown in Profile Preview, with no more configuration required.

Related Information

Legacy People Profile Header Settings
Profile Preview of the Latest People Profile

4.11.1 Important Notes About Pronouns

Before you start using pronouns, understand the following important notes and how they impact your SAP SuccessFactors system.

Modules That Support Pronouns

Here's a table of modules and features that partially support pronouns (with limitations) or fully support pronouns but require your extra attention (with notes). It's **not** a full list of modules and features that support pronouns.

Module	Feature	Notes and Limitations
Platform	Employee Profile	• Employees can select and display their pronouns in the legacy People Profile header and quickcard, and in the latest People Profile Preview. For more information, see Legacy People Profile Header Settings and Profile Preview of the Latest People Profile. **Note** Pronouns can't be shown in a Live Profile User Information block of the legacy People Profile, neither in the Employee Information card of the latest People Profile. • Employees with multiple employment only need to set up

Module	Feature	Notes and Limitations
		their pronouns once and they will be displayed for all employment in the People Profile. • If an employee has permission to view the pronouns of someone else's employment, they can view the pronouns for all the employment of the same person.
Recruiting	Job Requisition	Pronouns display support on Quick card Quick card will now display Pronouns for all Job Requisition pages where the operator fields displayed. The *Employee Details* quick card on the *Job Requisition Summary* page now displays the pronouns for Operator fields (including *Currently with*).
Recruiting	Candidate	Pronouns display support is not available for internal, external, and Agency candidate quick cards.

5 Managing Basic User Data by Using a Data File

To add or update user data for multiple users in one go, you can upload a user data file that contains all your changes to SAP SuccessFactors.

Context

You can upload or download a user data file by using the *Employee Import* or *Employee Export* tools. These tools can be accessed in the following ways:

Access Employee Import through...	Access Employee Export through...
Admin Center > *Employee Import*	*Admin Center* > *Employee Export*
Admin Center > *Manage Users* > *Import Users* > *User*	*Admin Center* > *Manage Users* > *Export Users* > *User*

We have universally enabled the delta mode in Employee Import and Basic User Import. The delta mode considers the rows changed in the import file. Only the data records that have actual changes will be imported, and the unchanged rows will not be updated to the system again. The delta mode helps reduce import time and improve import performance. Before, when you updated user information using Employee Import or Basic User Import, all records were imported.

1. Preparing a User Data File [page 99]
   A user data file is a Comma-Separated Value (CSV) file that contains basic information about your users, such as username and manager hierarchy, as well as any additional information that your company uses. Prepare your own user data file before you upload it to the system.
2. Importing Basic User Data [page 132]
   You can upload a user data file to *Employee Import* tool to update basic user data only in systems that **do not** have Employee Central enabled.

5.1 Preparing a User Data File

A user data file is a Comma-Separated Value (CSV) file that contains basic information about your users, such as username and manager hierarchy, as well as any additional information that your company uses. Prepare your own user data file before you upload it to the system.

Context

If you are preparing a user data file for the first time, you can start by downloading an import file template, and view it to see what fields to include. You can also download all existing user data in the system and make changes based on it.

Downloading a User Data Template [page 100]
If you want to create a new user data file, we recommend that you download the template and use it as the basis for your file. The template includes all required formatting, header rows, and data columns.

Exporting Basic User Data [page 101]
If you want to change user data, download the existing user data first. Make your changes in the downloaded file, then upload it back to SAP SuccessFactors.

General Tips for the User Data File [page 103]
To upload your user data file, the file must be formatted correctly and have all required fields.

Field Requirements for the User Data File [page 104]
Refer to the tables to make sure that the values you entered in your user data file meet the requirements.

Supported Characters [page 113]
Not all characters can be used in all fields of the User Data File, or in the information appearing on the Log On page. Specifically, the following table shows which characters can be used where.

Supported Time Zone [page 114]
Refer to this table to find the mapping relationship among the Time Zone ID, short name, and long name.

Task overview: Managing Basic User Data by Using a Data File [page 98]

Next task: Importing Basic User Data [page 132]

5.1.1 Downloading a User Data Template

If you want to create a new user data file, we recommend that you download the template and use it as the basis for your file. The template includes all required formatting, header rows, and data columns.

Prerequisites

- You have the role-based permission of *Employee Export* under *Manage User* admin permissions.
- If you do NOT want to include assignment ID in the template, select the *Exclude Assignment ID Column from the User Data Template* checkbox in *Admin Center* > *Platform Feature Settings*. This checkbox is not selected by default.

Context

The template is stored in the system and you can download it at any time. Use the template so that your file can be formatted correctly to upload.

Procedure

1. Go to *Admin Center*.
2. In the tools search field, type *Employee Export*.
3. Optional: If you want a file containing only the required fields, omitting any empty or custom fields, select *Short format: only system fields*.
4. If your file uses languages with specific character types, like Chinese characters, select the correct encoding from the *Character Encoding* dropdown menu so that the system can recognize the characters.
5. Click *Export Template* to download the template.

Results

Now you can add your user data to the template you downloaded.

Task overview: Preparing a User Data File [page 99]

Related Information

Exporting Basic User Data [page 101]

General Tips for the User Data File [page 103]
Field Requirements for the User Data File [page 104]
Supported Characters [page 113]
Supported Time Zone [page 114]

5.1.2 Exporting Basic User Data

If you want to change user data, download the existing user data first. Make your changes in the downloaded file, then upload it back to SAP SuccessFactors.

Prerequisites

You have the role-based permission of *Employee Export* under *Manage User* admin permissions.

Context

When you download a user data file, you're downloading the data that is currently stored in SAP SuccessFactors.

> Note
>
> As of Q2 2019, the CSV Injection Protection is enabled for all NEW instances by default for greater system security. If the User Data file (.csv) contains insecure content, the content is added as an apostrophe in the fields and doesn't trigger a command. Old instances aren't impacted by this change. If you're still using the insecure content in the file for some purpose, stop using it and find other ways. We do **NOT recommend** you to add insecure content into the Use Data file.
>
> If you want to enable the CSV Injection Protection for instances created before Q2 2019, contact Technical Support.

Procedure

1. Go to *Admin Center*.
2. In the tools search field, type *Employee Export*.
3. Expand the *Specify Export Options* section and select any of the following options:

Option	Description
Valid users only	To get a file containing only active users.

Option	Description
Short format: only system fields	To get a file containing only the required fields, omitting any empty or custom fields. Don't select this option if you want to include User Compensation Data.
Include additional identifiers	To get a file containing extra identifiers, like PERSON_GUID and PERSON_ID_EXTERNAL.

4. Expand the *Specify Character Encodings, Locale, Date Format, and Batch Process Option* section.
    a. If your file uses languages with specific character types, like Chinese characters, select the correct encoding from the *Character Encoding* dropdown menu so that the system can recognize the characters.
    b. Select *Export as a batch process* if you have a large number of records. By selecting this option, you can continue working on other tasks in SAP SuccessFactors while the export runs. Check back later to see if it's completed.

> ⓘ Note
>
> If Read Audit is turned on in your instance, you get a one-time download link that expires in 24 hours when you export the user data file as a batch. Export again if the link is expired.

5. Expand the *Specify Compensation Data Updating Options* section. Select the option in it if you want to include compensation data in the exported file.
6. Click *Export User File* to start the export.

Next Steps

If you're using the user data files for third-party integration, as a best practice, please configure your integration to read column header instead of column number.

Task overview: Preparing a User Data File [page 99]

Related Information

Downloading a User Data Template [page 100]
General Tips for the User Data File [page 103]
Field Requirements for the User Data File [page 104]
Supported Characters [page 113]
Supported Time Zone [page 114]

5.1.3 General Tips for the User Data File

To upload your user data file, the file must be formatted correctly and have all required fields.

> ⚠ Caution
>
> We recommend that you use the provided template for creating your own user data file. The template can be exported from the system anytime. All fields are case-sensitive. If you don't populate a field, please don't include the field in the user data file. Blank fields wipe out existing data in the database.

Read the following tips before preparing the user data file:

- File Format
  The file must be in the Comma-Separated Value (*.csv) format.
- Header Rows
  The first two rows of the data file template are header rows. Row 1 is a header row that displays the system keys that are used to organize user data. Row 2 is a header row that displays the column labels identifying employee data, which is displayed in SAP SuccessFactors.

  > ⚠ Caution
  >
  > Do not change row 1. Replicate this row exactly as you see it in the template. Note that all texts are in uppercase. You can customize row 2 to meet your company needs. Both the two rows are required.

- The First Two Columns
  The first two columns in the second header row must be the STATUS and USERID.
- Required Columns
  The file must contain all the required columns. Below are the required columns:
  - STATUS
  - USERID
  - USERNAME
  - FIRSTNAME
  - LASTNAME
  - EMAIL
  - GENDER
  - MANAGER
  - HR
  - DEPARTMENT
  - TIMEZONE

  > ⓘ Note
  >
  > Currently, the "User ID" column is **required** while "Assignment ID" is **optional** in the user data file. If you do not input a value in "Assignment ID", the system will populate the value from user ID to assignment ID after the import job completes.

- Employee Order
  The order of the employees in your file is important. A manager's and HR representative's user IDs must exist in the database before you add an employee, because employees are added to the system in the order that they appear in your file. Add employees in your file in the following order:

1. Managers
2. HR representatives
3. Employees

> ⓘ Note
>
> User data files contain sensitive information. When you download a user data file, you're removing the data from a secure environment. We recommend that you take precautions to safeguard this information.

Parent topic: Preparing a User Data File [page 99]

Related Information

Downloading a User Data Template [page 100]
Exporting Basic User Data [page 101]
Field Requirements for the User Data File [page 104]
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Supported Time Zone [page 114]

5.1.4 Field Requirements for the User Data File

Refer to the tables to make sure that the values you entered in your user data file meet the requirements.

Required Columns of the User Data File

The following table describes the data columns required for the user data file. You must include these columns in your user data file.

Column	Description	Valid values and requirements
STATUS	Determines whether the employee is an active or inactive employee. ⓘ Note If employee data is managed using Employee Central in your instance, please DO NOT update the values of the STATUS field by importing or through APIs.	Your options are: • Active = The employee can log in, use all available features, and show up in search results and reports. • Inactive = The employee can't log in. All employee information and forms remain in the system, but are frozen in their current state. Inactive employees don't show up in search

Column	Description	Valid values and requirements
		results but can be filtered out in reports. Must be the first column in the file.
USERID	The unique identifier of the user entity. The USERID is used for tracking individual employee records in the system. The USERID is permanently associated with the employee.	Must be the second column in the file. Must be unique in the system. Must be present during each upload. Must be at least four characters long. Can never be changed, even if the employee's name changes. Accordingly, USERID must not contain data that is considered confidential, such as social security number. Supported Unicode characters for USERID are "_", "-", "@" and ".". Accented characters aren't supported. For example, ñ, the Spanish letter with a tilde, isn't supported. **Note** Please be cautious when importing user IDs started with "0", because "0" is likely to be removed when imported, for example, using Excel. It will be considered as a user ID update that isn't supported.
USERNAME	The unique username assigned to the employee. The USERNAME is used to log into SAP SuccessFactors.	Must be unique in the system. Must be from 1 through 100 characters long. Can be changed as needed, for example, when a person marries and wants to use a different name. Visible in a variety of places to all end users. Accordingly, USERNAME must not contain data that is considered confidential, such as social security number. Supported Unicode characters for USERNAME are "!", "@", "#", "$", "%", "&", "*", "_", "-", "+", ".", "?", "~", and "`".

Column	Description	Valid values and requirements
		Accented characters aren't supported. For example, ñ, the Spanish letter with a tilde, isn't supported.
FIRSTNAME	The employee's first name. This name is displayed in SAP SuccessFactors.	Must be from 1 through 128 characters long.
LASTNAME	The employee's last name. This name is displayed inSAP SuccessFactors.	Must be from 1 through 128 characters long.
GENDER	The gender of the employee. Writing Assistant needs this information to use the correct gender pronoun (for example, he/his or she/her) when suggesting feedback text. **Note** If you're using Writing Assistant and want to enable additional gender values, please note this limitation: If a user's gender is unknown, undeclared, or others, the gender pronoun in Writing Assistant is he/his.	Supported values are: • M = Male • F = Female • U = Unknown • D = Undeclared • O = Others If you've enabled *Admin Center* > *Upgrade Center* > *Optional Upgrades* > *Enhancement to Gender Values - Inclusion of Additional Gender Values*, all the five gender values are supported. If you haven't enabled the option, only "Male" and "Female" values are supported. We've introduced validation for gender value. Invalid values will be blocked when you import the user data file. You can leave the field empty.
EMAIL	The complete e-mail address of the employee. Used for notifications, alerts, and resetting passwords.	Must be a complete email address, for example john@yourcompany.com.
MANAGER	The employee's manager.	Your options are: • Manager's USERID. **Note** Don't use the manager's username. • NO_MANAGER = The highest level employee or any employee without a manager, such as a CEO.

Column	Description	Valid values and requirements
		ⓘ Note Enter NO_MANAGER for any employee without a manager. Don't leave this field empty. Otherwise, the user isn't able to log in to the system.
HR	The human resources (HR) representative assigned to the employee.	Your options are: • HR representative's USERID. ⓘ Note Don't use the HR representative's username. • NO_HR = No HR representative is assigned to the employee. ⓘ Note Enter NO_HR for any employee without an HR representative. You can't leave this column empty.
DEPARTMENT	The department in which the employee works. Used as a filter for finding employees.	Can be renamed to use as a filter when searching for employees.
TIMEZONE	The time zone in which the employee works.	If you don't specify a value, Eastern Standard Time (EST) is used by default.

Optional Columns of the User Data File

The following table describes the optional data columns of the user data template. Some columns in your file might be different.

Column	Description	Valid values and requirements
MI	The employee's middle name. This name is shown in SAP SuccessFactors.	Must be from 1 through 128 characters long.

Column	Description	Valid values and requirements
JOBCODE	The code assigned to the employee’s job role. The JOBCODE is used to determine which role-specific competencies are automatically displayed in the employee's review forms.	Must be an existing job code.
DIVISION	The division in which the employee works. Used as a filter for finding employees.	Can be renamed to use as a filter when searching for employees.
LOCATION	The location where the employee works. Used as a filter for finding employees.	Can be renamed to use as a filter when searching for employees. We do not recommend that you update value of this field through import if Employee Central is enabled in your instance, because your updated values will be overwritten by HRIS sync. For information of how the field value is synced, refer to the sync logic from Foundation Object fields to string fields described in Special Handling for Syncing Fields.
HIREDATE	The date on which the employee was hired.	The data type is date. There will be validation check on the value. For example, "last year" and "22/44/2022" are invalid values.
EMPID	The employee's employee ID.	Must not be longer than 256 characters.
TITLE	The employee's title.	Must not be longer than 256 characters.
BIZ_PHONE	The employee's work phone number.	Must not be longer than 256 characters.
FAX	The employee's fax number.	Must not be longer than 256 characters.
ADDR1	The employee's address.	Must not be longer than 256 characters.
ADDR2		
CITY		
STATE		
ZIP		
COUNTRY		
REVIEW_FREQ	Frequency of the employee's performance reviews, for example Annual.	Must not be longer than 256 characters.
LAST_REVIEW_DATE	The date of the employee's last review.	Must not be longer than 256 characters.

Column	Description	Valid values and requirements
CUSTOM01-CUSTOM15	Customizable fields that can be used across modules for filtering, reporting, permissions, and administrative tasks.	You can create up to 15 custom fields.
MATRIX_MANAGER	The employee's dotted line manager.	The USERID of the employee's dotted line manager. Can include multiple managers. The syntax is to separate the manager USERIDs with pipe (|) characters. Example: gsmith624|sholmes423|smaddox666.
DEFAULT_LOCALE	The default locale used by the system for this user. Usually the locale value coincides with the user's language and country/region, for example en_US or en_UK.	If blank, the value defined for your company is used. Note The language of the locale value must have been enabled in Provisioning. If a disabled language is used in this field, the system language on the UI will be incorrect.
PROXY	The person who acts on behalf of the employee.	The USERID of the proxy. Can include multiple proxy holders. The syntax is to separate the proxy holder IDs with pipe (|) characters. Example: admin|sholmes423|smaddox666.
CUSTOM_MANAGER	The employee's custom manager.	The USERID of the employee's custom manager. Can include multiple managers. The syntax is to separate the manager USERIDs with pipe (|) characters. Example: gsmith624|sholmes423|smaddox666.
SECOND_MANAGER	The employee's second manager.	The USERID of the employee's second manager.
EXITDATE	The date on which the user exits the company or the date on which the employment is terminated in Employee Central.	The data type is date. There will be validation check on the value. For example, "last year" and "22/44/2022" are invalid values.
NICKNAME	The nickname of the user.	Must be from 1 through 128 characters long.
SUFFIX	The suffix of the user, for example, "Sr." and "Jr.".	Must be from 1 through 128 characters long.
SALUTATION	The salutation of the user.	Must be from 1 through 128 characters long.

Column	Description	Valid values and requirements
ASSIGNMENT_ID_EXTERNAL	The assignment ID of the user	• Be the last column in the file • For new users, assignment ID must be the same as user ID. • Can only be changed using the con-vertAssignmentIdExternal function import.
ASSIGNMENTUUID	Assignment UUIDs are "meaningless" IDs of assignments. Assignment UUIDs are Version 4 UUIDs of 32 characters, using all uppercase letters and no "-". For ex-ample, FDF7921CD3C242F59963B30E8895D0 4A.	We recommend that you leave this field empty and the system will generate UUIDs for new users. Please note that you can't update existing assignment UUIDs.
PERSON_ID_EXTERNAL	A unique identifier of a person in Em-ployee Central. You can define PersonI-dExternal through a rule or enter it on the UI for new hires. Please note that Per-sonIdExternal is labeled as "person ID" in many places. Person ID identifies a natural person. An employee generally has only one person ID throughout their time at the company, since this ID is associated to each per-son.	This field value can be changed.
PRONOUNS	Designations such as "she/her/her" that your employees want to display.	The picklist code for pronouns must be `PersonPronouns`. **Note** Use option ID instead of external code of the picklist when import the user data file.

Column	Description	Valid values and requirements
DISPLAYNAME	An employee name that is configured or imported by an admin to be displayed on UIs or other communication channel such as message, alert, email, and so on. **Note** DISPLAYNAME is automatically enabled in the Succession Data Model. You can see this element in the Business Configuration UI, but your updates to the element in BCUI won't take effect. This field is used for General Display Name. Please note that DISPLAYNAME here has nothing to do with `display-name` of Personal Information. For more information about `display-name`, see Personal Information.	Import and export are supported for both Employee Central instances and non-Employee Central instances. But we don't recommend that you update the values of the field through import if Employee Central is enabled, because your updated values will be overwritten by HRIS sync or when you refresh the general display name. In the import file, you can provide a new general display name or update the current display name of an employee. If you leave this field empty, the system calculates the value according to message key `COMMON_USER_DISPLAYNAME` in company default locale. If there is no full name, middle name, and last name, the field value is set to *Unknown*.
ASSIGNMENTDISPLAYHEADER	A title that is configured and imported by administrators to differentiate multiple employments. If Employee Central is on and employment differentiator is configured, this field is synced with employment differentiator. **Note** After you configured this standard element or updated the configuration, please refresh Assignment Display Header under *Admin Center* > *Company System and Logo Settings* > *Refresh Assignment Header*.	This field can be left empty. **Note** Please do not configure sensitive or restricted field for employment differentiator.

Column	Description	Valid values and requirements
COMPANY	A user's legal entity.	This field is by default disabled in the Succession Data Model. Before you can see the column in the user data file, enable the field in *Manage Business Configuration* > *Employee Profile* > *Standard Element* and added it to `sysVisibleUserDirectorySetting` template list in *Manage Business Configuration* > *Employee Profile* > *View Template* > *sysUserDirectorySetting*. **Note** To have the element configurable in the Business Configuration UI, make sure you've run the *Synchronize Business Configuration* job in *Scheduled Job Manager*. For more information, refer to Synchronize Business Configuration Job in Scheduled Job Manager. For Employee Central-enabled customers, the field value is HRIS synced. To learn how the value is synced, see the sync logic from Generic Object fields to string fields: Special Handling for Syncing Fields. To keep data consistency, we do not recommend these customers to update value of this field through import.

Parent topic: Preparing a User Data File [page 99]

Related Information

Downloading a User Data Template [page 100]
Exporting Basic User Data [page 101]
General Tips for the User Data File [page 103]
Supported Characters [page 113]
Supported Time Zone [page 114]

5.1.5 Supported Characters

Not all characters can be used in all fields of the User Data File, or in the information appearing on the Log On page. Specifically, the following table shows which characters can be used where.

Characters	Description	Company ID	User Id	Username	Password
a through z	Lowercase letters	Y	Y	Y	Y
A through Z	Uppercase letters	Y	Y	Y	Y
0 through 9	Numerals	Y	Y	Y	Y
_	Underscore	Y	Y	Y	Y
-	Hyphen	N	Y	Y	Y
@	At sign	N	Y	Y	Y
.	Period	N	Y	Y	Y
~	Tilde	N	N	Y	Y
!	Exclamation mark	N	N	Y	Y
#	Pound sign	N	N	Y	Y
$	Dollar sign	N	N	Y	Y
%	Percent sign	N	N	Y	Y
&	Ampersand	N	N	Y	Y
*	Asterisk	N	N	Y	Y
+	Plus sign	N	N	Y	Y
'	Single quote	N	N	Y	Y
`	Accent grave	N	N	Y	Y
?	Question mark	N	N	Y	Y
=	Equal sign	N	N	N	Y
^	Caret	N	N	N	Y
(	Left Parenthesis	N	N	N	Y
)	Right Parenthesis	N	N	N	Y
,	Comma	N	N	N	Y
/	Slash	N	N	N	Y
;	Semicolon	N	N	N	Y
[	Left bracket	N	N	N	Y
]	Right bracket	N	N	N	Y
<	Less than	N	N	N	Y
>	Greater than	N	N	N	Y
:	Colon	N	N	N	Y
"	Double quote	N	N	N	Y

Characters	Description	Company ID	User Id	Username	Password
{	Left braces	N	N	N	Y
}	Right braces	N	N	N	Y
\	Back slash	N	N	N	Y
|	Pipe sign	N	N	N	Y
	Space	N	N	N	N

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5.1.6 Supported Time Zone

Refer to this table to find the mapping relationship among the Time Zone ID, short name, and long name.

ID	Short Name	Long Name
Etc/GMT+12	GMT-12:00	GMT-12:00
Etc/GMT+11	GMT-11:00	GMT-11:00
MIT	WST	West Samoa Time
Pacific/Apia	WST	West Samoa Time
Pacific/Midway	SST	Samoa Standard Time
Pacific/Niue	NUT	Niue Time
Pacific/Pago_Pago	SST	Samoa Standard Time
Pacific/Samoa	SST	Samoa Standard Time
US/Samoa	SST	Samoa Standard Time
America/Adak	HADT	Hawaii-Aleutian Daylight Time
America/Atka	HADT	Hawaii-Aleutian Daylight Time
Etc/GMT+10	GMT-10:00	GMT-10:00
HST	HST	Hawaii Standard Time

ID	Short Name	Long Name
Pacific/Fakaofo	TKT	Tokelau Time
Pacific/Honolulu	HST	Hawaii Standard Time
Pacific/Johnston	HST	Hawaii Standard Time
Pacific/Rarotonga	CKT	Cook Is. Time
Pacific/Tahiti	TAHT	Tahiti Time
SystemV/HST10	HST	Hawaii Standard Time
US/Aleutian	HADT	Hawaii-Aleutian Daylight Time
US/Hawaii	HST	Hawaii Standard Time
Pacific/Marquesas	MART	Marquesas Time
AST	AKDT	Alaska Daylight Time
America/Anchorage	AKDT	Alaska Daylight Time
America/Juneau	AKDT	Alaska Daylight Time
America/Nome	AKDT	Alaska Daylight Time
America/Yakutat	AKDT	Alaska Daylight Time
Etc/GMT+9	GMT-09:00	GMT-09:00
Pacific/Gambier	GAMT	Gambier Time
SystemV/YST9	AKST	Alaska Standard Time
SystemV/YST9YDT	AKST	Alaska Standard Time
US/Alaska	AKDT	Alaska Daylight Time
America/Dawson	PDT	Pacific Daylight Time
America/Ensenada	PST	Pacific Standard Time
America/Los_Angeles	PDT	Pacific Daylight Time
America/Tijuana	PST	Pacific Standard Time
America/Vancouver	PDT	Pacific Daylight Time
America/Whitehorse	PDT	Pacific Daylight Time
Canada/Pacific	PDT	Pacific Daylight Time
Canada/Yukon	PDT	Pacific Daylight Time
Etc/GMT+8	GMT-08:00	GMT-08:00
Mexico/BajaNorte	PST	Pacific Standard Time
PST	PDT	Pacific Daylight Time
PST8PDT	PDT	Pacific Daylight Time
Pacific/Pitcairn	PST	Pitcairn Standard Time
SystemV/PST8	PST	Pacific Standard Time
SystemV/PST8PDT	PST	Pacific Standard Time
US/Pacific	PDT	Pacific Daylight Time

ID	Short Name	Long Name
US/Pacific-New	PDT	Pacific Daylight Time
America/Boise	MDT	Mountain Daylight Time
America/Cambridge_Bay	MDT	Mountain Daylight Time
America/Chihuahua	MST	Mountain Standard Time
America/Dawson_Creek	MST	Mountain Standard Time
America/Denver	MDT	Mountain Daylight Time
America/Edmonton	MDT	Mountain Daylight Time
America/Hermosillo	MST	Mountain Standard Time
America/Inuvik	MDT	Mountain Daylight Time
America/Mazatlan	MST	Mountain Standard Time
America/Phoenix	MST	Mountain Standard Time
America/Shiprock	MDT	Mountain Daylight Time
America/Yellowknife	MDT	Mountain Daylight Time
Canada/Mountain	MDT	Mountain Daylight Time
Etc/GMT+7	GMT-07:00	GMT-07:00
MST	MST	Mountain Standard Time
MST7MDT	MDT	Mountain Daylight Time
Mexico/BajaSur	MST	Mountain Standard Time
Navajo	MDT	Mountain Daylight Time
PNT	MST	Mountain Standard Time
SystemV/MST7	MST	Mountain Standard Time
SystemV/MST7MDT	MST	Mountain Standard Time
US/Arizona	MST	Mountain Standard Time
US/Mountain	MDT	Mountain Daylight Time
America/Belize	CST	Central Standard Time
America/Cancun	CST	Central Standard Time
America/Chicago	CDT	Central Daylight Time
America/Costa_Rica	CST	Central Standard Time
America/El_Salvador	CST	Central Standard Time
America/Guatemala	CST	Central Standard Time
America/Indiana/Knox	CDT	Central Daylight Time
America/Indiana/Petersburg	CDT	Central Daylight Time
America/Indiana/Vincennes	CDT	Central Daylight Time
America/Knox_IN	EDT	Eastern Daylight Time
America/Managua	CST	Central Standard Time

ID	Short Name	Long Name
America/Menominee	CDT	Central Daylight Time
America/Merida	CST	Central Standard Time
America/Mexico_City	CST	Central Standard Time
America/Monterrey	CST	Central Standard Time
America/North_Dakota/Center	CDT	Central Daylight Time
America/North_Dakota/New_Salem	CDT	Central Daylight Time
America/Rainy_River	CDT	Central Daylight Time
America/Rankin_Inlet	CDT	Central Daylight Time
America/Regina	CST	Central Standard Time
America/Swift_Current	CST	Central Standard Time
America/Tegucigalpa	CST	Central Standard Time
America/Winnipeg	CDT	Central Daylight Time
CST	CDT	Central Daylight Time
CST6CDT	CDT	Central Daylight Time
Canada/Central	CDT	Central Daylight Time
Canada/East-Saskatchewan	CST	Central Standard Time
Canada/Saskatchewan	CST	Central Standard Time
Chile/EasterIsland	EAST	Easter Is. Time
Etc/GMT+6	GMT-06:00	GMT-06:00
Mexico/General	CST	Central Standard Time
Pacific/Easter	EAST	Easter Is. Time
Pacific/Galapagos	GALT	Galapagos Time
SystemV/CST6	CST	Central Standard Time
SystemV/CST6CDT	CST	Central Standard Time
US/Central	CDT	Central Daylight Time
US/Indiana-Starke	EDT	Eastern Daylight Time
America/Atikokan	EST	Eastern Standard Time
America/Bogota	COT	Colombia Time
America/Cayman	EST	Eastern Standard Time
America/Coral_Harbour	EST	Eastern Standard Time
America/Detroit	EDT	Eastern Daylight Time
America/Eirunepe	ACT	Acre Time
America/Fort_Wayne	EDT	Eastern Daylight Time
America/Grand_Turk	EST	Eastern Standard Time
America/Guayaquil	ECT	Ecuador Time

ID	Short Name	Long Name
America/Havana	CST	Central Standard Time
America/Indiana/Indianapolis	EDT	Eastern Daylight Time
America/Indiana/Marengo	EDT	Eastern Daylight Time
America/Indiana/Vevay	EDT	Eastern Daylight Time
America/Indianapolis	EDT	Eastern Daylight Time
America/Iqaluit	EDT	Eastern Daylight Time
America/Jamaica	EST	Eastern Standard Time
America/Kentucky/Louisville	EDT	Eastern Daylight Time
America/Kentucky/Monticello	EDT	Eastern Daylight Time
America/Lima	PET	Peru Time
America/Louisville	EDT	Eastern Daylight Time
America/Montreal	EDT	Eastern Daylight Time
America/Nassau	EST	Eastern Standard Time
America/New_York	EDT	Eastern Daylight Time
America/Nipigon	EDT	Eastern Daylight Time
America/Panama	EST	Eastern Standard Time
America/Pangnirtung	EDT	Eastern Daylight Time
America/Port-au-Prince	EST	Eastern Standard Time
America/Porto_Acre	ACT	Acre Time
America/Rio_Branco	ACT	Acre Time
America/Thunder_Bay	EDT	Eastern Daylight Time
America/Toronto	EDT	Eastern Daylight Time
Brazil/Acre	ACT	Acre Time
Canada/Eastern	EDT	Eastern Daylight Time
Cuba	CST	Central Standard Time
EST	EST	Eastern Standard Time
EST5EDT	EDT	Eastern Daylight Time
Etc/GMT+5	GMT-05:00	GMT-05:00
IET	EDT	Eastern Daylight Time
Jamaica	EST	Eastern Standard Time
SystemV/EST5	EST	Eastern Standard Time
SystemV/EST5EDT	EST	Eastern Standard Time
US/East-Indiana	EDT	Eastern Daylight Time
US/Eastern	EDT	Eastern Daylight Time
US/Michigan	EDT	Eastern Daylight Time

ID	Short Name	Long Name
America/Anguilla	AST	Atlantic Standard Time
America/Antigua	AST	Atlantic Standard Time
America/Aruba	AST	Atlantic Standard Time
America/Asuncion	PYT	Paraguay Time
America/Barbados	AST	Atlantic Standard Time
America/Blanc-Sablon	AST	Atlantic Standard Time
America/Boa_Vista	AMT	Amazon Time
America/Campo_Grande	AMT	Amazon Time
America/Caracas	VET	Venezuela Time
America/Cuiaba	AMT	Amazon Time
America/Curacao	AST	Atlantic Standard Time
America/Dominica	AST	Atlantic Standard Time
America/Glace_Bay	ADT	Atlantic Daylight Time
America/Goose_Bay	ADT	Atlantic Daylight Time
America/Grenada	AST	Atlantic Standard Time
America/Guadeloupe	AST	Atlantic Standard Time
America/Guyana	GYT	Guyana Time
America/Halifax	ADT	Atlantic Daylight Time
America/La_Paz	BOT	Bolivia Time
America/Manaus	AMT	Amazon Time
America/Martinique	AST	Atlantic Standard Time
America/Moncton	ADT	Atlantic Daylight Time
America/Montserrat	AST	Atlantic Standard Time
America/Port_of_Spain	AST	Atlantic Standard Time
America/Porto_Velho	AMT	Amazon Time
America/Puerto_Rico	AST	Atlantic Standard Time
America/Santiago	CLT	Chile Time
America/Santo_Domingo	AST	Atlantic Standard Time
America/St_Kitts	AST	Atlantic Standard Time
America/St_Lucia	AST	Atlantic Standard Time
America/St_Thomas	AST	Atlantic Standard Time
America/St_Vincent	AST	Atlantic Standard Time
America/Thule	ADT	Atlantic Daylight Time
America/Tortola	AST	Atlantic Standard Time
America/Virgin	AST	Atlantic Standard Time

ID	Short Name	Long Name
Antarctica/Palmer	CLT	Chile Time
Atlantic/Bermuda	ADT	Atlantic Daylight Time
Atlantic/Stanley	FKST	Falkland Is. Summer
Brazil/West	AMT	Amazon Time
Canada/Atlantic	ADT	Atlantic Daylight Time
Chile/Continental	CLT	Chile Time
Etc/GMT+4	GMT-04:00	GMT-04:00
PRT	AST	Atlantic Standard Time
SystemV/AST4	AST	Atlantic Standard Time
SystemV/AST4ADT	AST	Atlantic Standard Time
America/St_Johns	NDT	Newfoundland Daylight Time
CNT	NDT	Newfoundland Daylight Time
Canada/Newfoundland	NDT	Newfoundland Daylight Time
AGT	ART	Argentine Time
America/Araguaina	BRT	Brasilia Time
America/Argentina/Buenos_Aires	ART	Argentine Time
America/Argentina/Catamarca	ART	Argentine Time
America/Argentina/ComodRivadavia	ART	Argentine Time
America/Argentina/Cordoba	ART	Argentine Time
America/Argentina/Jujuy	ART	Argentine Time
America/Argentina/La_Rioja	ART	Argentine Time
America/Argentina/Mendoza	ART	Argentine Time
America/Argentina/Rio_Gallegos	ART	Argentine Time
America/Argentina/San_Juan	ART	Argentine Time
America/Argentina/Tucuman	ART	Argentine Time
America/Argentina/Ushuaia	ART	Argentine Time
America/Bahia	BRT	Brasilia Time
America/Belem	BRT	Brasilia Time
America/Buenos_Aires	ART	Argentine Time
America/Catamarca	ART	Argentine Time
America/Cayenne	GFT	French Guiana Time
America/Cordoba	ART	Argentine Time
America/Fortaleza	BRT	Brasilia Time
America/Godthab	WGT	Western Greenland Time
America/Jujuy	ART	Argentine Time

ID	Short Name	Long Name
America/Maceio	BRT	Brasilia Time
America/Mendoza	ART	Argentine Time
America/Miquelon	PMDT	Pierre & Miquelon Daylight Time
America/Montevideo	UYT	Uruguay Time
America/Paramaribo	SRT	Suriname Time
America/Recife	BRT	Brasilia Time
America/Rosario	ART	Argentine Time
America/Sao_Paulo	BRT	Brasilia Time
Antarctica/Rothera	ROTT	Rothera Time
BET	BRT	Brasilia Time
Brazil/East	BRT	Brasilia Time
Etc/GMT+3	GMT-03:00	GMT-03:00
America/Noronha	FNT	Fernando de Noronha Time
Atlantic/South_Georgia	GST	South Georgia Standard Time
Brazil/DeNoronha	FNT	Fernando de Noronha Time
Etc/GMT+2	GMT-02:00	GMT-02:00
America/Scoresbysund	EGT	Eastern Greenland Time
Atlantic/Azores	AZOT	Azores Time
Atlantic/Cape_Verde	CVT	Cape Verde Time
Etc/GMT+1	GMT-01:00	GMT-01:00
Africa/Abidjan	GMT	Greenwich Mean Time
Africa/Accra	GMT	Greenwich Mean Time
Africa/Bamako	GMT	Greenwich Mean Time
Africa/Banjul	GMT	Greenwich Mean Time
Africa/Bissau	GMT	Greenwich Mean Time
Africa/Casablanca	WET	Western European Time
Africa/Conakry	GMT	Greenwich Mean Time
Africa/Dakar	GMT	Greenwich Mean Time
Africa/El_Aaiun	WET	Western European Time
Africa/Freetown	GMT	Greenwich Mean Time
Africa/Lome	GMT	Greenwich Mean Time
Africa/Monrovia	GMT	Greenwich Mean Time
Africa/Nouakchott	GMT	Greenwich Mean Time
Africa/Ouagadougou	GMT	Greenwich Mean Time
Africa/Sao_Tome	GMT	Greenwich Mean Time

ID	Short Name	Long Name
Africa/Timbuktu	GMT	Greenwich Mean Time
America/Danmarkshavn	GMT	Greenwich Mean Time
Atlantic/Canary	WET	Western European Time
Atlantic/Faeroe	WET	Western European Time
Atlantic/Madeira	WET	Western European Time
Atlantic/Reykjavik	GMT	Greenwich Mean Time
Atlantic/St_Helena	GMT	Greenwich Mean Time
Eire	GMT	Greenwich Mean Time
Etc/GMT	GMT+00:00	GMT+00:00
Etc/GMT+0	GMT+00:00	GMT+00:00
Etc/GMT-0	GMT+00:00	GMT+00:00
Etc/GMT0	GMT+00:00	GMT+00:00
Etc/Greenwich	GMT	Greenwich Mean Time
Etc/UCT	UTC	Coordinated Universal Time
Etc/UTC	UTC	Coordinated Universal Time
Etc/Universal	UTC	Coordinated Universal Time
Etc/Zulu	UTC	Coordinated Universal Time
Europe/Belfast	GMT	Greenwich Mean Time
Europe/Dublin	GMT	Greenwich Mean Time
Europe/Guernsey	GMT	Greenwich Mean Time
Europe/Isle_of_Man	GMT	Greenwich Mean Time
Europe/Jersey	GMT	Greenwich Mean Time
Europe/Lisbon	WET	Western European Time
Europe/London	GMT	Greenwich Mean Time
GB	GMT	Greenwich Mean Time
GB-Eire	GMT	Greenwich Mean Time
GMT	GMT	Greenwich Mean Time
GMT0	GMT+00:00	GMT+00:00
Greenwich	GMT	Greenwich Mean Time
Iceland	GMT	Greenwich Mean Time
Portugal	WET	Western European Time
UCT	UTC	Coordinated Universal Time
UTC	UTC	Coordinated Universal Time
Universal	UTC	Coordinated Universal Time
WET	WET	Western European Time

ID	Short Name	Long Name
Zulu	UTC	Coordinated Universal Time
Africa/Algiers	CET	Central European Time
Africa/Bangui	WAT	Western African Time
Africa/Brazzaville	WAT	Western African Time
Africa/Ceuta	CET	Central European Time
Africa/Douala	WAT	Western African Time
Africa/Kinshasa	WAT	Western African Time
Africa/Lagos	WAT	Western African Time
Africa/Libreville	WAT	Western African Time
Africa/Luanda	WAT	Western African Time
Africa/Malabo	WAT	Western African Time
Africa/Ndjamena	WAT	Western African Time
Africa/Niamey	WAT	Western African Time
Africa/Porto-Novo	WAT	Western African Time
Africa/Tunis	CET	Central European Time
Africa/Windhoek	WAST	Western African Summer Time
Arctic/Longyearbyen	CET	Central European Time
Atlantic/Jan_Mayen	CET	Central European Time
CET	CET	Central European Time
ECT	CET	Central European Time
Etc/GMT-1	GMT+01:00	GMT+01:00
Europe/Amsterdam	CET	Central European Time
Europe/Andorra	CET	Central European Time
Europe/Belgrade	CET	Central European Time
Europe/Berlin	CET	Central European Time
Europe/Bratislava	CET	Central European Time
Europe/Brussels	CET	Central European Time
Europe/Budapest	CET	Central European Time
Europe/Copenhagen	CET	Central European Time
Europe/Gibraltar	CET	Central European Time
Europe/Ljubljana	CET	Central European Time
Europe/Luxembourg	CET	Central European Time
Europe/Madrid	CET	Central European Time
Europe/Malta	CET	Central European Time
Europe/Monaco	CET	Central European Time

ID	Short Name	Long Name
Europe/Oslo	CET	Central European Time
Europe/Paris	CET	Central European Time
Europe/Prague	CET	Central European Time
Europe/Rome	CET	Central European Time
Europe/San_Marino	CET	Central European Time
Europe/Sarajevo	CET	Central European Time
Europe/Skopje	CET	Central European Time
Europe/Stockholm	CET	Central European Time
Europe/Tirane	CET	Central European Time
Europe/Vaduz	CET	Central European Time
Europe/Vatican	CET	Central European Time
Europe/Vienna	CET	Central European Time
Europe/Warsaw	CET	Central European Time
Europe/Zagreb	CET	Central European Time
Europe/Zurich	CET	Central European Time
MET	MET	Middle Europe Time
Poland	CET	Central European Time
ART	EET	Eastern European Time
Africa/Blantyre	CAT	Central African Time
Africa/Bujumbura	CAT	Central African Time
Africa/Cairo	EET	Eastern European Time
Africa/Gaborone	CAT	Central African Time
Africa/Harare	CAT	Central African Time
Africa/Johannesburg	SAST	South Africa Standard Time
Africa/Kigali	CAT	Central African Time
Africa/Lubumbashi	CAT	Central African Time
Africa/Lusaka	CAT	Central African Time
Africa/Maputo	CAT	Central African Time
Africa/Maseru	SAST	South Africa Standard Time
Africa/Mbabane	SAST	South Africa Standard Time
Africa/Tripoli	EET	Eastern European Time
Asia/Amman	EET	Eastern European Time
Asia/Beirut	EET	Eastern European Time
Asia/Damascus	EET	Eastern European Time
Asia/Gaza	EET	Eastern European Time

ID	Short Name	Long Name
Asia/Istanbul	EET	Eastern European Time
Asia/Jerusalem	IST	Israel Standard Time
Asia/Nicosia	EET	Eastern European Time
Asia/Tel_Aviv	IST	Israel Standard Time
CAT	CAT	Central African Time
EET	EET	Eastern European Time
Egypt	EET	Eastern European Time
Etc/GMT-2	GMT+02:00	GMT+02:00
Europe/Athens	EET	Eastern European Time
Europe/Bucharest	EET	Eastern European Time
Europe/Chisinau	EET	Eastern European Time
Europe/Helsinki	EET	Eastern European Time
Europe/Istanbul	EET	Eastern European Time
Europe/Kaliningrad	EET	Eastern European Time
Europe/Kiev	EET	Eastern European Time
Europe/Mariehamn	EET	Eastern European Time
Europe/Minsk	EET	Eastern European Time
Europe/Nicosia	EET	Eastern European Time
Europe/Riga	EET	Eastern European Time
Europe/Simferopol	EET	Eastern European Time
Europe/Sofia	EET	Eastern European Time
Europe/Tallinn	EET	Eastern European Time
Europe/Tiraspol	EET	Eastern European Time
Europe/Uzhgorod	EET	Eastern European Time
Europe/Vilnius	EET	Eastern European Time
Europe/Zaporozhye	EET	Eastern European Time
Israel	IST	Israel Standard Time
Libya	EET	Eastern European Time
Turkey	EET	Eastern European Time
Africa/Addis_Ababa	EAT	Eastern African Time
Africa/Asmera	EAT	Eastern African Time
Africa/Dar_es_Salaam	EAT	Eastern African Time
Africa/Djibouti	EAT	Eastern African Time
Africa/Kampala	EAT	Eastern African Time
Africa/Khartoum	EAT	Eastern African Time

ID	Short Name	Long Name
Africa/Mogadishu	EAT	Eastern African Time
Africa/Nairobi	EAT	Eastern African Time
Antarctica/Syowa	SYOT	Syowa Time
Asia/Aden	AST	Arabia Standard Time
Asia/Baghdad	AST	Arabia Standard Time
Asia/Bahrain	AST	Arabia Standard Time
Asia/Kuwait	AST	Arabia Standard Time
Asia/Qatar	AST	Arabia Standard Time
Asia/Riyadh	AST	Arabia Standard Time
EAT	EAT	Eastern African Time
Etc/GMT-3	GMT+03:00	GMT+03:00
Europe/Moscow	MSK	Moscow Standard Time
Europe/Volgograd	VOLT	Volgograd Time
Indian/Antananarivo	EAT	Eastern African Time
Indian/Comoro	EAT	Eastern African Time
Indian/Mayotte	EAT	Eastern African Time
W-SU	MSK	Moscow Standard Time
Asia/Riyadh87	GMT+03:07	GMT+03:07
Asia/Riyadh88	GMT+03:07	GMT+03:07
Asia/Riyadh89	GMT+03:07	GMT+03:07
Mideast/Riyadh87	GMT+03:07	GMT+03:07
Mideast/Riyadh88	GMT+03:07	GMT+03:07
Mideast/Riyadh89	GMT+03:07	GMT+03:07
Asia/Tehran	IRST	Iran Standard Time
Iran	IRST	Iran Standard Time
Asia/Baku	AZT	Azerbaijan Time
Asia/Dubai	GST	Gulf Standard Time
Asia/Muscat	GST	Gulf Standard Time
Asia/Tbilisi	GET	Georgia Time
Asia/Yerevan	AMT	Armenia Time
Etc/GMT-4	GMT+04:00	GMT+04:00
Europe/Samara	SAMT	Samara Time
Indian/Mahe	SCT	Seychelles Time
Indian/Mauritius	MUT	Mauritius Time
Indian/Reunion	RET	Reunion Time

ID	Short Name	Long Name
NET	AMT	Armenia Time
Asia/Kabul	AFT	Afghanistan Time
Asia/Aqtau	AQTT	Aqtau Time
Asia/Aqtobe	AQTT	Aqtobe Time
Asia/Ashgabat	TMT	Turkmenistan Time
Asia/Ashkhabad	TMT	Turkmenistan Time
Asia/Dushanbe	TJT	Tajikistan Time
Asia/Karachi	PKT	Pakistan Time
Asia/Oral	ORAT	Oral Time
Asia/Samarkand	UZT	Uzbekistan Time
Asia/Tashkent	UZT	Uzbekistan Time
Asia/Yekaterinburg	YEKT	Yekaterinburg Time
Etc/GMT-5	GMT+05:00	GMT+05:00
Indian/Kerguelen	TFT	French Southern & Antarctic Lands Time
Indian/Maldives	MVT	Maldives Time
PLT	PKT	Pakistan Time
Asia/Calcutta	IST	India Standard Time
Asia/Colombo	LKT	Sri Lanka Time
IST	IST	India Standard Time
Asia/Katmandu	NPT	Nepal Time
Antarctica/Mawson	MAWT	Mawson Time
Antarctica/Vostok	VOST	Vostok Time
Asia/Almaty	ALMT	Alma-Ata Time
Asia/Bishkek	KGT	Kirgizstan Time
Asia/Dacca	BDT	Bangladesh Time
Asia/Dhaka	BDT	Bangladesh Time
Asia/Novosibirsk	NOVT	Novosibirsk Time
Asia/Omsk	OMST	Omsk Time
Asia/Qyzylorda	QYZT	Qyzylorda Time
Asia/Thimbu	BTT	Bhutan Time
Asia/Thimphu	BTT	Bhutan Time
BST	BDT	Bangladesh Time
Etc/GMT-6	GMT+06:00	GMT+06:00
Indian/Chagos	IOT	Indian Ocean Territory Time
Asia/Rangoon	MMT	Myanmar Time

ID	Short Name	Long Name
Indian/Cocos	CCT	Cocos Islands Time
Antarctica/Davis	DAVT	Davis Time
Asia/Bangkok	ICT	Indochina Time
Asia/Hovd	HOVT	Hovd Time
Asia/Jakarta	WIT	West Indonesia Time
Asia/Krasnoyarsk	KRAT	Krasnoyarsk Time
Asia/Phnom_Penh	ICT	Indochina Time
Asia/Pontianak	WIT	West Indonesia Time
Asia/Saigon	ICT	Indochina Time
Asia/Vientiane	ICT	Indochina Time
Etc/GMT-7	GMT+07:00	GMT+07:00
Indian/Christmas	CXT	Christmas Island Time
VST	ICT	Indochina Time
Antarctica/Casey	WST	Western Standard Time (Australia)
Asia/Brunei	BNT	Brunei Time
Asia/Chongqing	CST	China Standard Time
Asia/Chungking	CST	China Standard Time
Asia/Harbin	CST	China Standard Time
Asia/Hong Kong	HKT	Hong Kong Time
Asia/Irkutsk	IRKT	Irkutsk Time
Asia/Kashgar	CST	China Standard Time
Asia/Kuala_Lumpur	MYT	Malaysia Time
Asia/Kuching	MYT	Malaysia Time
Asia/Macao	CST	China Standard Time
Asia/Makassar	CIT	Central Indonesia Time
Asia/Manila	PHT	Philippines Time
Asia/Shanghai	CST	China Standard Time
Asia/Singapore	SGT	Singapore Time
Asia/Taipei	CST	China Standard Time
Asia/Ujung_Pandang	CIT	Central Indonesia Time
Asia/Ulaanbaatar	ULAT	Ulaanbaatar Time
Asia/Ulan_Bator	ULAT	Ulaanbaatar Time
Asia/Urumqi	CST	China Standard Time
Australia/Perth	WST	Western Standard Time (Australia)
Australia/West	WST	Western Standard Time (Australia)

ID	Short Name	Long Name
CTT	CST	China Standard Time
Etc/GMT-8	GMT+08:00	GMT+08:00
Hong Kong	HKT	Hong Kong Time
PRC	CST	China Standard Time
Singapore	SGT	Singapore Time
Asia/Choibalsan	CHOT	Choibalsan Time
Asia/Dili	TPT	East Timor Time
Asia/Jayapura	EIT	East Indonesia Time
Asia/Pyongyang	KST	Korea Standard Time
Asia/Seoul	KST	Korea Standard Time
Asia/Tokyo	JST	Japan Standard Time
Asia/Yakutsk	YAKT	Yakutsk Time
Etc/GMT-9	GMT+09:00	GMT+09:00
JST	JST	Japan Standard Time
Japan	JST	Japan Standard Time
Pacific/Palau	PWT	Palau Time
ROK	KST	Korea Standard Time
ACT	CST	Central Standard Time (Northern Territory)
Australia/Adelaide	CST	Central Summer Time (South Australia)
Australia/Broken_Hill	CST	Central Summer Time (South Australia/New South Wales)
Australia/Darwin	CST	Central Standard Time (Northern Territory)
Australia/North	CST	Central Standard Time (Northern Territory)
Australia/South	CST	Central Summer Time (South Australia)
Australia/Yancowinna	CST	Central Summer Time (South Australia/New South Wales)
AET	EST	Eastern Summer Time (New South Wales)
Antarctica/DumontDUrville	DDUT	Dumont-d'Urville Time
Asia/Sakhalin	SAKT	Sakhalin Time
Asia/Vladivostok	VLAT	Vladivostok Time
Australia/ACT	EST	Eastern Summer Time (New South Wales)
Australia/Brisbane	EST	Eastern Standard Time (Queensland)

ID	Short Name	Long Name
Australia/Canberra	EST	Eastern Summer Time (New South Wales)
Australia/Currie	EST	Eastern Summer Time (New South Wales)
Australia/Hobart	EST	Eastern Summer Time (Tasmania)
Australia/Lindeman	EST	Eastern Standard Time (Queensland)
Australia/Melbourne	EST	Eastern Summer Time (Victoria)
Australia/NSW	EST	Eastern Summer Time (New South Wales)
Australia/Queensland	EST	Eastern Standard Time (Queensland)
Australia/Sydney	EST	Eastern Summer Time (New South Wales)
Australia/Tasmania	EST	Eastern Summer Time (Tasmania)
Australia/Victoria	EST	Eastern Summer Time (Victoria)
Etc/GMT-10	GMT+10:00	GMT+10:00
Pacific/Guam	ChST	Chamorro Standard Time
Pacific/Port_Moresby	PGT	Papua New Guinea Time
Pacific/Saipan	ChST	Chamorro Standard Time
Pacific/Truk	TRUT	Truk Time
Pacific/Yap	YAPT	Yap Time
Australia/LHI	LHST	Load Howe Summer Time
Australia/Lord_Howe	LHST	Load Howe Summer Time
Asia/Magadan	MAGT	Magadan Time
Etc/GMT-11	GMT+11:00	GMT+11:00
Pacific/Efate	VUT	Vanuatu Time
Pacific/Guadalcanal	SBT	Solomon Is. Time
Pacific/Kosrae	KOST	Kosrae Time
Pacific/Noumea	NCT	New Caledonia Time
Pacific/Ponape	PONT	Ponape Time
SST	SBT	Solomon Is. Time
Pacific/Norfolk	NFT	Norfolk Time
Antarctica/McMurdo	NZDT	New Zealand Daylight Time
Antarctica/South_Pole	NZDT	New Zealand Daylight Time
Asia/Anadyr	ANAT	Anadyr Time
Asia/Kamchatka	PETT	Petropavlovsk-Kamchatski Time
Etc/GMT-12	GMT+12:00	GMT+12:00

ID	Short Name	Long Name
Kwajalein	MHT	Marshall Islands Time
NST	NZDT	New Zealand Daylight Time
NZ	NZDT	New Zealand Daylight Time
Pacific/Auckland	NZDT	New Zealand Daylight Time
Pacific/Fiji	FJT	Fiji Time
Pacific/Funafuti	TVT	Tuvalu Time
Pacific/Kwajalein	MHT	Marshall Islands Time
Pacific/Majuro	MHT	Marshall Islands Time
Pacific/Nauru	NRT	Nauru Time
Pacific/Tarawa	GILT	Gilbert Is. Time
Pacific/Wake	WAKT	Wake Time
Pacific/Wallis	WFT	Wallis & Futuna Time
NZ-CHAT	CHADT	Chatham Daylight Time
Pacific/Chatham	CHADT	Chatham Daylight Time
Etc/GMT-13	GMT+13:00	GMT+13:00
Pacific/Enderbury	PHOT	Phoenix Is. Time
Pacific/Tongatapu	TOT	Tonga Time
Etc/GMT-14	GMT+14:00	GMT+14:00
Pacific/Kiritimati	LINT	Line Is. Time

Parent topic: Preparing a User Data File [page 99]

Related Information

Downloading a User Data Template [page 100]
Exporting Basic User Data [page 101]
General Tips for the User Data File [page 103]
Field Requirements for the User Data File [page 104]
Supported Characters [page 113]

5.2 Importing Basic User Data

You can upload a user data file to *Employee Import* tool to update basic user data only in systems that **do not** have Employee Central enabled.

Prerequisites

- You have the *Administrator Permissions* > *Manage System Properties* > *Platform Feature Settings* permission.
- In *Platform Feature Settings* admin tool, you've enabled the *Enable Control Employee Import Permission in RBP* option.
- You've granted administrators the *Administrator Permissions* > *Manage User* > *Employee Import* permission to use the tool. A role with this permission can import data for all users, regardless of the target population setting.

  > Note
  >
  > If the *Enable Control on Employee Import in Role-Based Permissions* option is not enabled, you can instead use the *Manage Employee Import* admin tool to grant and remove the employee import permission for individual users. This tool allows you to define the data import target population for each user by division, department, and location.

- The user data file must be formatted correctly and have all required fields. For more information about how to format your file, see General Tips for the User Data File [page 103] and Field Requirements for the User Data File [page 104].

Context

You can only access the *Employee Import* tool in systems that do not have Employee Central enabled. If you've enabled Employee Central, update basic user data through *Import Employee Data* > *Basic Import*. See Employee Data Imports for more information.

Procedure

1. Go to *Admin Center* > *Employee Import*.
2. Click *Choose File* to select your user data file.
3. Specify how initial passwords are to be assigned for new employees.
4. Optional: Select any of the following options:

Option	Description
Send welcome email to new users	To automatically send welcome emails to new users, Email template needs to be enabled beforehand. If you haven't enabled it, a warning is displayed. To enable the email template, see Enabling and Customizing Welcome Email Template [page 64].
Validate Manager and HR fields	To ensure that each employee record has a valid manager and HR representative.
Process inactive Employees	To update the information of inactive employees to the system. **Note** You cannot use *Employee Import* to add inactive users to the system.
Re-activate purged users	To reactivate purged users in the system if the users are active in the user data file.

5. Optional: If your updates include manager changes, expand the *Specify Form routing options* section to specify the automatic manager transfer and automatic document removal options. For more information about each option, see Configuring Document Transfer in Form Templates.
6. Optional: Expand the *Specify Character Encodings, Locale, and Date Format* section.

   The default locale and date format are "English(United States)" and "MM/dd/yyyy". Other available locales in your system depend on the configuration of Language Packs in Provisioning, and the date format will match the locale you select. Please note that we only support multiple date formats in the Hire Date and Exit Date fields.

   > → Remember
   >
   > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

7. Optional: If you want to update compensation forms, expand the *Specify Compensation form updating options* section to select compensation options.
8. Optional: Click *Validate Import File* to validate your user data file. If any errors are found, the errors are displayed on the top of the page. Please correct the errors before importing.
9. Click *Import User File* to import your user data.

Results

After the file is uploaded, the SAP SuccessFactors user database is updated with the information from that file. You receive an email notification with the results of the upload, including any errors. If your updates include manager changes, you receive another email notification with the results of document transfer, including lists of users whose forms have been transferred or failed to transfer.

If any errors occurred, you need to correct them in the file and then upload it again. If that doesn't resolve the problem, contact Technical Support. See Common Errors and Troubleshooting [page 136] for descriptions of and solutions for the most common errors.

Importing Matrix and Custom Managers [page 134]
You can update employees' matrix or custom managers by importing a CSV file.

Common Errors and Troubleshooting [page 136]
After the file upload is complete, you will receive an e-mail notification. This e-mail contains the results of your upload, including any errors that occurred.

Task overview: Managing Basic User Data by Using a Data File [page 98]

Previous task: Preparing a User Data File [page 99]

5.2.1 Importing Matrix and Custom Managers

You can update employees' matrix or custom managers by importing a CSV file.

Prerequisites

- You have the *Matrix Manager and Custom Manager Relationship Import* permission under *Manage User Data* admin permissions.
- `matrixManager` and `customManager` have been configured in Succession Data Model.

Context

You use matrix managers or custom managers to maintain dotted reporting lines or backup management. In addition to using the standard user data file to import and export the matrix and custom manager, you can also update the information with the *Import Matrix Manager and Custom Manager Relationships* admin tool.

Matrix managers can show in the Company Organization Chart, Succession Org Chart, home page, and People Profile. Custom relationships can only show in the Succession Org Chart. If the *Show custom relationships in the legacy Org Chart, home page, and mobile People Profile* option has been enabled in the *Company System and Logo Settings* admin page, the matrix or custom manager are shown with a dotted reporting line.

Procedure

1. Create a CSV file with the employee user ID, manager user ID, manager type, and so on. To differentiate the manager types, use the following codes:
   - **EX**: Matrix Manager
   - **EC**: Custom Manager

In the CSV file, you can also specify whether the matrix manager information is to be displayed in the Company Organization Chart or Succession Org Chart. However, to display the manager, make sure that you've enabled the display in the *Org Chart Configuration* admin tool and have configured XML definition for the chart.

2. Determine how you want to update the information and format the CSV file accordingly:
    - The simple CSV file without the ACTION column updates any existing matrix or custom manager information of the employee. See the following sample CSV file:

      Sample Code

      ```
      USERID,MGR_USERID,RELATIONSHIP,ORG_CHART_DISPLAY
      cgrant1,athompson1,EX,TRUE
      cgrant2,dcortez,EX,FALSE
      cgrant3,aaaa,EC,FALSE
      ```

      In this example, for user cgrant1 and cgrant2, any existing matrix manager information will be overwritten; for user cgrant3, the previous custom manager information will be overwritten.
    - A CSV file with the ACTION column supports incremental addition to or removal of existing matrix or custom manager information. See the following sample:

      Sample Code

      ```
      USERID,MGR_USERID,RELATIONSHIP,ORG_CHART_DISPLAY,ACTION
      cgrant1, athompson1, EX, TRUE, ADD
      cgrant2, dcortez, EX, FALSE, REMOVE
      cgrant3, aaaa, EC, FALSE, REMOVE
      ```

Matrix and Manager Relationships Display

Show Custom Manager Relationships in Company Organization Chart	**ORG_CHART_DISPLAY = True**	**ORG_CHART_DISPLAY = False**
Option disabled	Matrix relationships display. Custom relationships **don't** display.	Matrix relationships display. Custom relationships **don't** display.
Option enabled	Matrix relationships display. Custom relationships display.	Matrix relationships **don't** display. Custom relationships **don't** display.

> Note
>
> You can also import multiple manages for the same employee. Simply create multiple lines for the employee in the CSV file.

3. Upload the file through *Admin Center* > *Import Matrix Manager and Custom Manager Relationships*.

Results

The matrix or custom manager information of the relevant employees has been updated.

> Note
>
> In the Succession Org Chart, the dotted line appears only when the position has an incumbent.

Task overview: Importing Basic User Data [page 132]

Related Information

Common Errors and Troubleshooting [page 136]
Managing Basic User Data by Using a Data File [page 98]

5.2.2 Common Errors and Troubleshooting

After the file upload is complete, you will receive an e-mail notification. This e-mail contains the results of your upload, including any errors that occurred.

You might see some of these common error messages in the e-mail notification. To correct these and any other errors, update the data file and then upload it again. If you're still having trouble uploading the data file, contact Technical Support.

This error message...	Means that...	To resolve it...
Missing required field.	Required information was not provided.	Fill in all required information and upload the file again. For more information about required fields, see Field Requirements for the User Data File [page 104].
Username already exists.	There's a duplicate username.	Remove duplicate users and upload the file again.
Manager Cycle detected with this manager ID — <manager id>.	There are manager cycles in the user hierarchy.	Make sure that the employee's own USERID is not listed instead of the manager's USERID. Make sure that the employee doesn't appear both above and below the manager in the file. Make sure there is no Manager Cycle. An example of Manager Cycle is that user A's manager is user B, user B's manager is user C, and user C's manger is user A.
Invalid Manager ID.	The manager's UserID listed for the employee doesn't exist in the database.	Make sure that the manager's USERID exists in the database. If you're adding both the employee and manger, make sure that the manager is added before the employee.

Parent topic: Importing Basic User Data [page 132]

Related Information

Importing Matrix and Custom Managers [page 134]

6 Managing Extended User Information by Using Data Files

To add or update extended user data for multiple users in one go, you can upload user data files respectively for personal information, trend information, and background information.

6.1 Extended User Information

Extended user information consists of supplemental data about users in your SAP SuccessFactors system, beyond the "basic" user information such as name, job title, and department.

There are three types of extended user information:

- Personal information
- Background information
- Trend information

> ⓘ Note
>
> - We recommend that you perform periodic exports of all three data files and save these outside of the application, in case you ever need to refer to historical data and need to restore old records that are deleted. SAP SuccessFactors does not retain historical records that are deleted, so back up this information regularly.
> - We recommend that any time you do manual import of any profile data, you export a backup of the data first. This way if a mistake is made (usually with the *Import by overwriting existing data* option), then you can easily recover.
> - Remember that all the options and file types discussed here also apply to the FTP process. You can import or export these files on an automated schedule, and can choose what format and options to select just like we could do with manual import or export.

Personal Information in the Extended User Information Import [page 139]
    Personal information consists of supplemental "one-to-one" data about a user— that is, data for which there is only one record for each employee.

Trend Information in the Extended User Information Import [page 140]
    Trend information consists of "one-to-many" rating data from your talent review process— that is, data for which there may be multiple records for each employee.

Background Information in the Extended User Information Import [page 141]
    Background information consists of supplemental "one-to-many" background data about a user— that is, data for which there may be multiple records for each employee.

Parent topic: Managing Extended User Information by Using Data Files [page 138]

Related Information

Adding or Updating Extended User Information [page 142]
Importing or Exporting Background Information with Attachments [page 153]
Managing Profile Photos for Employees [page 162]

6.1.1 Personal Information in the Extended User Information Import

Personal information consists of supplemental "one-to-one" data about a user— that is, data for which there is only one record for each employee.

For example, personal information might include:

- Personal data, such as date of birth or veteran status
- Job information, such as start date
- Talent flags, such as risk of loss or willingness to relocate

> ⓘ Note
>
> - This type of extended user information is **not** the same "personal information" and "job information" data that is included in SAP SuccessFactors Employee Central. For information about how to import data to Employee Central, please see here.
> - In Employee Central-enabled instances, you can prevent the import of unsecured content by enabling the *Security Scan of User Inputs* option. This applies when you import basic user information using *Import Employee Data*, and when you import personal information using *Import Extended User Information* or the *Live Profile Import* job in Provisioning.
>
> > → Remember
> >
> > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

> The *Security Scan of User Inputs* option can be enabled in *Admin Center* > *Application Security Feature Settings*. Once it is enabled, the unsecure scripts, such as cross-site scripting, will be identified and ignored in the import. The fields skipped are reported in the import status e-mail.

Personal information in your instance is defined by standard elements and userinfo elements in Succession Data Model. Every employee has a database record for each personal information field in your instance, even if it is blank.

The personal information import file does **not** include "basic" user information that is included in the Basic Employee Import file used to add new employees to the system.

You can limit employees (rows) and data fields (columns) to import by omitting them from the import file. For example, if you don't want to import `date`, remove the `date` column from the import file. If you include an employee and a column in the import, it will overwrite any existing data, even if left blank.

Parent topic: Extended User Information [page 138]

Related Information

Trend Information in the Extended User Information Import [page 140]
Background Information in the Extended User Information Import [page 141]

6.1.2 Trend Information in the Extended User Information Import

Trend information consists of "one-to-many" rating data from your talent review process— that is, data for which there may be multiple records for each employee.

Trend information usually includes the following rating data:

- Performance
- Potential
- Competency
- Objective

It may also include up to two custom rating types, if defined in the Succession Data Model for your instance.

Each type of trend information (such as performance ratings) can include multiple records for each employee (such as for each performance review cycle).

By default, the trend information export only includes those ratings that have been entered manually in People Profile or the ones that are imported. You can include ratings that come from forms by extra settings.

Parent topic: Extended User Information [page 138]

Related Information

Personal Information in the Extended User Information Import [page 139]
Background Information in the Extended User Information Import [page 141]

6.1.3 Background Information in the Extended User Information Import

Background information consists of supplemental "one-to-many" background data about a user— that is, data for which there may be multiple records for each employee.

For example, background information might include:

- Previous work experience
- Education history
- Languages spoken

Background information is entirely customized and different in every instance. It is defined by the background elements in the Succession Data Model.

> Note
>
> If there are duplicate field names for background elements in the data model, the import job will fail.

Each type of background information (such as education) can include multiple records for each employee (such as for different educational degrees).

The background information import file can include multiple sections, one for each type of background data. You can limit the import to certain sections and exclude others, but you must include all columns for each included section.

> Note
>
> Import jobs on the same background information cannot be run concurrently to avoid data conflicts. The current job will wait in the queue and not start until the previous job completes.

Parent topic: Extended User Information [page 138]

Related Information

Personal Information in the Extended User Information Import [page 139]
Trend Information in the Extended User Information Import [page 140]

6.1.3.1 Validation of the Import File of Background Information

When you import the file for the background information, the system automatically validates the file content to ensure correctness of the definition.

Before you import the file, you can select the *Stop import if invalid users found* checkbox and the import stops when invalid user data is found. If you haven't selected the checkbox, the import continues but the invalid user data isn't imported into the system.

The available validation on the data file includes the following:

- User IDs are valid.
- Mandatory data fields have values. (The mandatory data fields are defined as "`required = true`" in the data model.)
- Valid optionIds for picklist values are used in the file.
- Date values are valid.
- If there are start and end dates, the end date is not earlier than the start date.

> ⓘ Note
>
> In the data model file, you might have defined a maximum number of data entries for a background data element. For example, a user can only have up to three pieces of education information. However, this maximum limit doesn't apply to data file import and the system doesn't verify whether the imported user entries exceed the limit.
>
> If users have permission to import extended user information, they can import all background data for all users. The import is not limited by the *Employee Data* user permission.

6.2 Adding or Updating Extended User Information

Add or import extended user information using a CSV import.

Prerequisites

You have the role-based permissions of *Export Extended User Information* and *Import Extended User Information* under the *Manage User* admin permissions.

Procedure

1. Create an import file in CSV format, either by exporting the existing data or by exporting a template.

2. Add or update data in the CSV file.

> ⓘ Note
>
> In the import CSV file, either user ID or assignment ID should be provided, and they should be the same as the corresponding user ID or assignment ID that already exists in the system.

3. Import data in the CSV file to the system. You can choose either an "incremental" import that only adds new data or an "overwrite" import that replaces all existing records.

1. Creating an Import File for Extended User Information [page 143]
   Create a CSV import file that you can use to add or update extended user information.
2. Editing Extended User Information in the Import File [page 147]
   Add or update extended user information in your CSV file to prepare it for import.
3. Importing Extended User Information [page 150]
   Import extended user information into your instance.

Task overview: Managing Extended User Information by Using Data Files [page 138]

Related Information

Extended User Information [page 138]
Importing or Exporting Background Information with Attachments [page 153]
Managing Profile Photos for Employees [page 162]

6.2.1 Creating an Import File for Extended User Information

Create a CSV import file that you can use to add or update extended user information.

Context

By default, the user data template contains the Assignment ID column. However, if you select *Exclude Assignment ID Column from the User Data Template* in *Admin Center* > *Platform Feature Settings*, this column won't be included.

> ⓘ Note
>
> When you import **background** or **trend** information, and your import file includes an "assignment ID" column, then the column header should be specified like **^AssignmentId**. The header name is case-insensitive, and other characters such as quotation marks or whitespace aren't supported here. For example,^"AssignmentId" as the column header will cause an error during the import process.

Procedure

1. Begin in one of the following ways:
   - To add or update existing extended user information, start by exporting the data from your instance, using the *Export Extended Data only* option.
   - To create an import file from scratch and import extended user information for the first time, start by exporting a CSV template, using the *Export Template* option.
2. Save the resulting export file in CSV format.

Next Steps

You can now edit the CSV file to add or update the information and prepare it for import.

Exporting Extended User Information [page 144]
Export extended user information from your instance.

Downloading an Extended User Information Import Template [page 146]
Download an extended user information import template so that you can use it to add or update data.

Task overview: Adding or Updating Extended User Information [page 142]

Next: Editing Extended User Information in the Import File [page 147]

6.2.1.1 Exporting Extended User Information

Export extended user information from your instance.

Prerequisites

You have the role-based permission of *Export Extended User Information* under the *Manage User* admin permissions.

Context

> → Tip
>
> The system displays the settings you defined for the last export. So you don't need to reset all the settings for each export.

Procedure

1. Go to *Admin Center* > *Export Extended User Information*.
2. Specify the type of data you want to export.
   - Personal Information
   - Background Information
   - Trend Information
     The trend information export file, by default, only includes those ratings that have been entered manually in People Profile or the ones that are imported, and does not include ratings that come from forms. If you want to include rating data coming from forms in the export file, select *Include form data*.
3. Specify the locale and character encoding you want to use in the export file.

   If you are exporting data in a language that uses special character types, such as Chinese, be sure to select the relevant character encoding so that the data is displayed correctly.
4. Specify additional export options by selecting one or more of the following:

Export Option	Description
Export as a batch process	Select if you want to run the export as a batch job and download the latest export file multiple times. Exporting as a batch allows you to leave the export page and return to pick up the file later. You will receive notifications once the job completes. This option is only applicable to the *Export Extended Data Only* and *Export Extended Data with User Attributes* buttons. Note that if the number of exported records exceeds 5000, the export will be run as a batch job even though this option is not enabled.
Valid users only.	Select this option if you want to exclude inactive users. If checked, the export only includes data for active users.
Remove carriage returns and line breaks on export	Select this option to remove any carriage returns and line breaks from the export file.
Export selected background information	This option is visible only when you choose to export background information in step 2. If you want to export only a particular section of background information, select this option and choose the section from the drop-down list.

5. Select one of two export options to trigger the export.
   - Use the *Export Extended Data only* to export the data that you want to edit and import again. This option exports data in exactly the correct format required for import.
   - Use the *Export Extended Data with User Attributes* to export the data in a more readable report. This option includes additional user data, such as name and manager, in the export file, to make it easier to read.
6. **Optional:** Go to *Admin Center* > *Scheduled Job Manager* to monitor the scheduled job of Live Profile Export for background information or trend information.

   When the export of background information or trend information is triggered, a corresponding scheduled job of Live Profile Export is automatically generated. You can monitor the scheduled job in Admin Center.

> ⓘ Note
>
> If you are exporting personal information, it doesn't trigger any scheduled job. So you can't monitor the export of personal information as a scheduled job.

Results

All existing data in the system, of the selected type, is extracted and downloaded in CSV format.

Related Information

Monitoring Scheduled Jobs in Admin Center

6.2.1.2 Downloading an Extended User Information Import Template

Download an extended user information import template so that you can use it to add or update data.

Prerequisites

You have the role-based permission of *Export Extended User Information* under the *Manage User* admin permissions.

Procedure

1. Go to *Admin Center*.
2. In the tools search field, type *Export Extended User Information*.
3. Specify the type of data you want to export.
    - Personal Information
    - Background Information
    - Trend Information
4. Ignore the local and export options. They are irrelevant to the template export.
5. Click *Export Template* to export the template.

Results

A blank CSV template file is opened. The template contains column headers indicating the user data fields that should be entered in each column. For background and trend information, there may be more than one row of headers, one for each type of background or trend element configured in your system. The exact user data fields available in the template are based on the configuration of your instance's data model.

Next Steps

You can now add rows of data for any existing user in your system. For background and trend information, you can add multiple rows for each user, one for each type of background or trend element configured in your system.

6.2.2 Editing Extended User Information in the Import File

Add or update extended user information in your CSV file to prepare it for import.

You can use any spreadsheet application to view the data in columns and rows and save in CSV format. The column headers must be configured in your data model. If you want to use new headers, contact your Implementation Partner to add them in the data model beforehand.

If you use attachments as part of background information in your system, import them through a job in the *Scheduled Job Manager* admin tool. For more information, see Importing or Exporting Background Information with Attachments [page 153].

Date Formats for Different Locales [page 148]
In *Import Extended User Information*, you can select the locale information according to the language you are using in the import file. To meet the habits of users using different languages, the date format is also different. Refer to the table for the supported locales and date formats.

Parent topic: Adding or Updating Extended User Information [page 142]

Previous task: Creating an Import File for Extended User Information [page 143]

Next task: Importing Extended User Information [page 150]

6.2.2.1 Date Formats for Different Locales

In *Import Extended User Information*, you can select the locale information according to the language you are using in the import file. To meet the habits of users using different languages, the date format is also different. Refer to the table for the supported locales and date formats.

> ⓘ Note
>
> Personal, Background, and Trend information all support the same date format standards as indicated in the following table.

Language	Locale Code	Date Format	Example
English US	en_US	mm/dd/yyyy	07/19/2018
English UK	en_GB	dd/mm/yyyy	19/07/2018
Brazil	pt_BR	dd/mm/yyyy	19/07/2018
Mexico	es_MX	dd/mm/yyyy	19/07/2018
Chinese	zh_CN	yyyy-mm-dd	2018-07-19
Taiwan	zh_TW	yyyy/mm/dd	2018/07/19
Korean	ko_KR	yyyy. mm. dd ⓘ Note There's a space after each dot.	2018. 07. 19
Japanese	ja_JP	yyyy/mm/dd	2018/07/19
German	de_DE	dd.mm.yyyy	19.07.2018
Russian	ru_RU	dd.mm.yyyy	19.07.2018
Romanian	ro_RO	dd.mm.yyyy	19.07.2018
Spanish	es_ES	dd/mm/yyyy	19/07/2018
French	fr_FR	dd/mm/yyyy	19/07/2018
Canadian	fr_CA	yyyy-mm-dd	2018-07-19
Italian	it_IT	dd/mm/yyyy	19/07/2018
Czech	cs_CZ	dd.mm.yyyy	19.07.2018
Danish	da_DK	dd-mm-yyyy	19-07-2018
Croatian	hr_HR	dd.mm.yyyy.	19.07.2018.
Turkish	tr_TR	dd.mm.yyyy	19.07.2018
Greek	el_GR	dd/mm/yyyy	19/07/2018
Hungarian	hu_HU	yyyy.mm.dd.	2018.07.19.
Dutch	nl_NL	dd-mm-yyyy	19-07-2018
Norwegian	no_NO	dd.mm.yyyy	19.07.2018

Language	Locale Code	Date Format	Example
Swiss	de_CH	dd.mm.yyyy	19.07.2018
Polish	pl_PL	dd.mm.yyyy	19.07.2018
Slovak	sk_SK	dd.mm.yyyy	19.07.2018
Finnish	fi_FI	dd.mm.yyyy	19.07.2018
Swedish	sv_SE	yyyy-mm-dd	2018-07-19
Indonesia	bs_ID	dd/mm/yyyy	19/07/2018
Malay	bs_BS	dd/mm/yyyy	19/07/2018
Vietnamese	vi_VN	dd/mm/yyyy	19/07/2018
Portuguese	pt_PT	dd-mm-yyyy	19-07-2018
Slovenian	sl_SI	dd.mm.yyyy	19.07.2018
Latvian	lv_LV	yyyy.dd.mm	2018.19.07
Ukrainian	uk_UA	dd.mm.yyyy	19.07.2018
Estonian	et_EE	dd.mm.yyyy	19.07.2018
Welsh	cy_GB	mm/dd/yyyy	07/19/2018
Macedonian	mk_MK	dd.mm.yyyy	19.07.2018
Montenegrin	cnr_ME	mm/dd/yyyy	07/19/2018
Lithuanian	lt_LT	yyyy.mm.dd	2018.07.19
Serbian	sr_RS	dd.mm.yyyy.	19.07.2018.
Catalan	ca_ES	dd/mm/yyyy	19/07/2018
Norwegian Bokmål	nb_NO	dd.mm.yyyy	19.07.2018
Bulgarian	bg_BG	dd.mm.yyyy	19.07.2018
Hindi	hi_IN	dd/mm/yyyy	19/07/2018
Hebrew	iw_IL	dd/mm/yyyy	19/07/2018
Arabic	ar_SA	dd/mm/yyyy	19/07/2018
Thai	th_TH	dd/mm/yyyy	02/02/2558

Parent topic: Editing Extended User Information in the Import File [page 147]

6.2.3 Importing Extended User Information

Import extended user information into your instance.

Prerequisites

You have *Administrator Permissions* > *Manage User* > *Import Extended User Information* permission.

> Note
>
> - If you want to update user data in the system, make sure that the users are included in the target population of your role-based permission.
> - The *Employee Data* user permissions don't affect the import. As long as you have the *Import Extended User Information* role-based permission and define the corresponding target population, you are able to import user data.

If you want to hide the option of importing background information by overwriting existing data, you need to have *Administrator Permissions* > *Manage User* > *Hide the Option to Import by Overwriting Existing Data for Background Information* permission.

Context

> → Tip
>
> The system displays the settings you defined for the last import. So you don't need to reset all the settings for each import.

Procedure

1. Go to *Admin Center* > *Import Extended User Information*.
2. Select *Choose File* and select the CSV import file you have prepared on your local machine.
3. Specify the type of data contained in your import file.
    - Personal Information
    - Background Information
    - Trend Information
4. Specify the locale and character encoding used in your import file.

    If you are importing data in a language that uses special character types, such as Chinese, be sure to select the relevant character encoding so that the data is displayed correctly after import.

It's recommended to use the consistent locale setting with overall language setting. For more information, see Locale Settings [page 152].

5. Expand the *Specify Additional File Options* section and set the desired import options.

   Always expand and verify the options in this section to make sure that they are correct.
6. Select or deselect the *Stop import if invalid users found*.

   Select this option to stop the import process if an invalid user or reporting relationship is found in the import file. This is useful when troubleshooting new files to make sure that they are formatted properly. If you haven't selected this option, the import continues but the invalid user data isn't imported into the system.
7. Select the import behavior:
   - Select *Import by incrementally adding data* if you want to **add new records only** without deleting any existing data.
   - Only for personal information or trend information: Select *Import by overwriting existing data* if you want to **replace existing records** with data in the import file for all users in your instance.

     > Note
     >
     > - For trend information, the *Import by overwriting existing data* option overwrites all ratings data (performance, potential, competency, objective, custom1 & custom2) that does **not** come from forms, for **all users** in your instance, even if they are **not** included in the import file.
     > - For personal information, this option is required and is always checked. There is only one record of personal information per user, so all new records must overwrite the existing ones.
   - Only for background information: select *Import by overwriting existing data* > *Overwrite the data of all users* if you want to replace existing records with data in the import file **for all users in your instance**.

     > Note
     >
     > The overwrite only affects the background elements that are included in the import file for all users in your instance. Of these background elements, the background data in your instance is replaced by that in the import file.
     >
     > If you exclude certain background elements from the import file, this background data is not impacted by the import. So you do not have to import every background element in your instance; you can import a file that contains only the background elements you want to update.
     >
     > If you import a file that contains attachment IDs, do not select this option. Otherwise, the corresponding attachment files will be deleted.
   - Only for background information: select *Import by overwriting existing data* > *Overwrite the data of users in the import file* if you want that **only for users listed in the import file**, data of their background elements is replaced by the corresponding data in the import file.

     > Note
     >
     > This overwrite only affects these specified users' background elements that are included in the import file. For example, an import file only includes a Languages record of user A and a Education record of user B. After the import, only user A's Languages record and user B's Education record are replaced.
     >
     > If you import a file that contains attachment IDs, do not select this option. Otherwise, the corresponding attachment files will be deleted.

8. Select *Import Extended User Data File* to start the import. If you choose to overwrite existing data with your new changes for background or trend information, a pop-up window is displayed, asking for confirmation to overwrite existing data.

   > Note
   >
   > The import job needs some time to finish. While one import job is running, do not start another job until the current one is finished. Otherwise, it leads to data corruption, especially when you run jobs with the option to overwrite existing data.

9. **Optional:** Go to *Admin Center* > *Scheduled Job Manager* to monitor the scheduled job of Live Profile Import for background information or trend information.

   When the import of background information or trend information is triggered, a corresponding scheduled job of Live Profile Import is automatically generated. You can monitor the scheduled job in Admin Center.

   > Note
   >
   > If you are importing personal information, it doesn't trigger any scheduled job. So you can't monitor the import of personal information as a scheduled job.

Results

The extended user information in the import file is uploaded to the system for relevant users. If you uploaded background information, you might receive two email notifications, one is for Background Sync, and the other is for Background Import. This is expected behavior, because a background sync job is triggered automatically in the backend as well as the import job.

Task overview: Adding or Updating Extended User Information [page 142]

Previous: Editing Extended User Information in the Import File [page 147]

Related Information

Monitoring Scheduled Jobs in Admin Center

6.2.3.1 Locale Settings

When you import a file that contains trend or background information, it's recommended that the locale you specify is consistent with the overall language setting in *Settings* > *Change Language*.

If the settings aren't consistent, dates aren't parsed correctly by the system.

For example, let's assume *English US* is selected in the overall setting and *English UK* is specified in import options. The US date format is MM/DD/YYYY, while the UK date format is DD/MM/YYYY.

When system parses a date, for example, startDate=04/01/2013 and endDate=04/29/2013, the system first follows the time format used by the import options, which can only parse the start date as January 4, 2013. The end date can't be parsed. Then the system tries the time format in the overall setting, which can parse the end date as April 29, 2013. Apparently, it's not what's intended.

For the supported locales in the system, refer to Date Formats for Different Locales [page 148].

6.3 Importing or Exporting Background Information with Attachments

You can import or export background information, including its attachments in the *Scheduled Job Manager* admin tool.

You can attach documents as part of the background information to employees' profiles. Attachments can be added manually by a user in People Profile, or be imported and exported in bulk with a scheduled job in the *Admin Center* > *Scheduled Job Manager* tool.

> **Note**
>
> You can't use the *Import Extended User Information* and *Export Extended User Information* admin tool to manage attachments.

Create a ZIP file containing the attachments you want to import for background information and a CSV mapping file. Then upload the file to your SFTP server so the attachments can be imported to the system through a scheduled job in the *Scheduled Job Manager* admin tool.

Import background information and its attachments in bulk by scheduling a job in the *Scheduled Job Manager* admin tool.

To add or edit existing background information, start by exporting background information or a type of background information including its attachments in the *Scheduled Job Manager* admin tool.

Parent topic: Managing Extended User Information by Using Data Files [page 138]

Related Information

Extended User Information [page 138]
Adding or Updating Extended User Information [page 142]
Managing Profile Photos for Employees [page 162]
Managing Scheduled Jobs in Admin Center
Creating a Scheduled Job Request in Admin Center

6.3.1 Uploading Attachments to an SFTP Server for Bulk Import

Create a ZIP file containing the attachments you want to import for background information and a CSV mapping file. Then upload the file to your SFTP server so the attachments can be imported to the system through a scheduled job in the *Scheduled Job Manager* admin tool.

Prerequisites

The `<attachment>` field is configured in the data model for your instance and appears as a column in the CSV import template for background information.

Context

File names for the ZIP, CSV, and attachment files can't contain any spaces. Use underscores or dashes. The system validates the files and the import fails if files have names with spaces.

> Note
>
> The file size of the attachment should be no larger than the following two limitations that are configured in Provisioning and the data model. If the two maximum file sizes are different, follow the smaller one.
>
> - The *Attachment max file size* setting under *Document Attachment* in Provisioning
> - The *max-file-size-KB* setting for the data fields that allow attachments in the data model

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Procedure

1. Collect all the attachments you want to import in one folder.
2. Create an import file for background information in one of the following ways:
   - To add or update existing background information, start by exporting the data from your instance through an *Export Background Information* job in the *Scheduled Job Manager* tool.
   - To create an import file from scratch and import background information for the first time, start by exporting a CSV template:
     1. Go to *Admin Center* > *Export Extended User Information*.
     2. Select the *Background Information* option.
     3. Select the *Export Template* option.
     4. Save it as a CSV file.

3. Remove all background elements except the one for which you want to import attachments.

   For example, suppose you have a background information block called "Certificates" that includes an attachment and a document name. The CSV may look like this:

   > Example
   >
   > | ^UserId | ^AssignmentId | certificates | name | attachment |
   > |---|---|---|---|---|
   > | | | | | |
   > | | | | | |

   > Note
   >
   > The columns in your template may vary. Background elements can contain other data fields, such as dates or descriptions, in addition to attachments. However, you can only import attachments to a background element that has an *Attachment* column in the import template.

4. Create a mapping file by filling out one row in the CSV file for each attachment you want to import, including the following information:

Column	Description
User ID	The first column in the CSV file is `^UserId`. It's the user ID of the employee for whom you are importing the attachment.
Assignment ID	The value must be the same as the corresponding assignment ID that already exists in the system. You can exclude this field from the mapping file.
Background Element ID	This is the column next to the "user ID" column or "assignment ID" column if exists. This column identifies the background element for which you're importing attachments.
Attachment	There must be an "attachment" column in the CSV file that contains the file name (including the file extension) of the attachment for that user. It isn't necessarily the third column because the import template reflects the field order that's configured in the data model.
Other columns for fields defined in the data model	The import template reflects the fields and field order that are defined in the data model. It contains columns for any other fields defined. In our example, a field called `name` defines a display label for the certificate document, as it appears in the UI. Your import template shows fields configured for your system.

In our example, the completed mapping file looks like this:

> Example

^UserId	^AssignmentId	certificates	name	attachment
AE0012	AE0012	certificates	bshervin_ae0012	bshervin_ae0012.pdf
AE0014	AE0014	certificates	ghill_ea0014	ghill_ea0014.pdf

5. Save the CSV mapping file to the same folder where you saved all your attachments.
6. Select all the files in the folder, the attachments and mapping file, and compress them together.

> → Tip
>
> Select all the files and compress them directly, rather than compress the folder that contains them. Compressing the folder can cause issues with the import.

In our example, the files to be compressed look like this:

> Example

Name	Type
BackgroundTemplate_BestRunCompany.csv	Microsoft Excel Com...
bshervin_ae0012.pdf	PDF File
ghill_ea0014.pdf	PDF File

7. Upload your ZIP file to a folder on your SFTP server.

Next Steps

Create a job request to import background information along with the attachments in the *Scheduled Job Manager*.

Task overview: Importing or Exporting Background Information with Attachments [page 153]

Related Information

Importing Background Information and Attachments [page 157]
Exporting Background Information and Attachments [page 159]

6.3.2 Importing Background Information and Attachments

Import background information and its attachments in bulk by scheduling a job in the *Scheduled Job Manager* admin tool.

Prerequisites

- You've uploaded a ZIP file containing attachments and a CSV mapping file to a directory on the SFTP server. For security reasons, we recommend that you use the SAP SuccessFactors hosted SFTP server. In case you don't have an SFTP account, contact your Partner or Technical Support.
- You have the following permissions:
  - *Admin Center Permissions* > *Monitor Scheduled Jobs*
  - *Admin Center Permissions* > *Manage Scheduled Jobs*

Context

> Note
>
> This job can be scheduled to run a maximum of 20 times per day in the Admin Center. The daily execution times are counted based on server time.

Procedure

1. Go to *Admin Center* > *Scheduled Job Manager*.
2. On the *Job Scheduler* tab, choose *Create Job Request*.
3. In the *Job Definition* section, enter the following information.

Setting	Description
Job Name	The name given to the job.
Job Type	Select the option *Import Background Information*.
Job Owner	The job owner must be the person who created this job request.

4. In the *Job Parameters* section, select *Include Attachments* if you want to import attachments for background information.
5. Specify the locale and character encoding used in your import file.

   If you are importing data in a language that uses special character types, such as Chinese, be sure to select the relevant character encoding so that the data is displayed correctly after import.

It's recommended to use the consistent locale setting with overall language setting. For more information, see Locale Settings [page 152].

6. **Optional:** Select *Stop Import If Invalid Users Found*.

   Select this option to stop the import process if an invalid user or other incorrect data is found in the import file. This is useful when troubleshooting new files to make sure that they are formatted properly. If you don't select this option, the import continues but the invalid user data isn't imported into the system.
7. Select an import mode:
   - Select *Import Data Incrementally* if you want to add new records only without deleting any existing data.
   - Select *Overwrite Data of All Users* if you want to replace records for all users with data in the import file.

     > ⓘ Note
     >
     > The overwrite only affects the background elements included in the import file for all users in your instance. Data of these background elements is replaced by that in the import file.
     >
     > If you exclude certain background elements from the import file, the corresponding background data is not affected by the import. So you don't have to import data for every background element in your instance; you can import a file that contains only the background elements you want to update.
8. In the *FTP Configuration* section, enter information about the server access and file access.

   > ⓘ Note
   >
   > We recommend that you use an SFTP server for stability and security.
9. In the *Job Occurrence* section, define how frequently you want the job to run.
10. In the *Notification* section, define who receives email notifications besides the job owner.
11. To finish, choose one of two options:
    - Choose *Submit* to save the job request and submit it to the job scheduler, so that the job is scheduled to run at the specified time.
    - Choose *Save* to save the job request, but not submit it. Configurations are saved but the job isn't scheduled to run yet.

Results

After the job is completed, two entries are displayed on the *Job Monitor* tab in *Scheduled Job Manager* in the following order:

1. A job named *Triggered by the Job Request <Your Job Request ID>* of the job type *Live Profile Import*: this is a job in Provisioning triggered by your job request.

   > → Tip
   >
   > You can find more information about the job progress in the run details of the triggered job.
2. The job request that you created

Next Steps

You can monitor and manage the job request in the *Scheduled Job Manager* admin tool. See Related Information for details.

Task overview: Importing or Exporting Background Information with Attachments [page 153]

Related Information

Uploading Attachments to an SFTP Server for Bulk Import [page 154]
Exporting Background Information and Attachments [page 159]
Managing Scheduled Jobs in Admin Center
Creating a Scheduled Job Request in Admin Center

6.3.3 Exporting Background Information and Attachments

To add or edit existing background information, start by exporting background information or a type of background information including its attachments in the *Scheduled Job Manager* admin tool.

Prerequisites

You have the following permissions:

- *Admin Center Permissions* > *Monitor Scheduled Jobs*
- *Admin Center Permissions* > *Manage Scheduled Jobs*

Context

> ⓘ Note
>
> This job can be scheduled to run a maximum of 20 times per day in the Admin Center. The daily execution times are counted based on server time.

Procedure

1. Go to *Admin Center* > *Scheduled Job Manager*.
2. On the *Job Scheduler* tab, choose *Create Job Request*.
3. In the *Job Definition* section, enter the following information

Setting	Description
Job Name	The name given to the job.
Job Type	Select the option *Export Background Information*.
Job Owner	The job owner must be the person who created this job request.

4. In the *Job Parameters* > *Data to Export* section, specify what data you want to export by selecting one or more of the following:

Option	Description
Export Selected Background Information	If you want to export only a particular type of background information, select this option and a background element from the list.
Include Attachments	Export attachments for background information.

5. Specify if you want to include basic user data:
    - Select *Export Background Information Only* to export the background information that you want to edit and import again. This option exports data in exactly the correct format required for import.
    - Select *Export Background Information with Basic User Data* to export the data in a more readable report. This option includes basic user data, such as name and manager, in the export file, to make it easier to read.
6. Specify the locale and character encoding used in your export file.

    If you are exporting data in a language that uses special character types, such as Chinese, be sure to select the relevant character encoding so that the data is displayed correctly.

    It's recommended to use the consistent locale setting with overall language setting. For more information, see Locale Settings [page 152].
7. In the *Job Parameters* > *General Export Options* section, define export methods by selecting one or more of the following:

Option	Description
Export Data for Valid Users Only	Select this option to export data only for active users.
Remove Carriage Returns and Line Breaks from Files	Select this option to remove any carriage returns and line breaks from the export file.
Unzip Exported Files	Note If you export attachments, this option doesn't take effect. Because of large data volume, the export files are zipped even if you choose this option.

8. In the *FTP Configuration* section, enter information about the server access and file access.

> **Note**
>
> - Because of large data volume, currently we don't support file encryption for exporting background information with attachments. Select the option *None* for the field *Encryption* if you're allowed to access the unencrypted files.
> - If you want to encrypt export files, deselect the *Include Attachments* option.
> - We recommend that you use the SAP SuccessFactors hosted SFTP server for stability and security.

9. In the *Job Occurrence* section, define how frequently you want the job to run.
10. In the *Notification* section, define who receives email notifications besides the job owner.
11. To finish, choose one of two options:
    - Choose *Submit* to save the job request and submit it to the job scheduler, so that the job is scheduled to run at the specified time.
    - Choose *Save* to save the job request, but not submit it. Configurations are saved but the job isn't scheduled to run yet.

Results

After the job is completed, two entries are displayed on the *Job Monitor* tab in *Scheduled Job Manager* in the following order:

1. A job named *Triggered by the Job Request <Your Job Request ID>* of the job type *Live Profile Export*: this is a job in Provisioning triggered by your job request.

> → Tip
>
> You can find more information about the job progress in the run details of the triggered job.

2. The job request that you created

One or more ZIP files consisting of a CSV file and attachments are exported, and you receive an e-mail about the export results. The exported ZIP file names follow this pattern: `BackgroundDataWithAttachments<file number>.zip`.

In the CSV file, the "attachment" column contains the corresponding file names of attachments.

Next Steps

You can monitor and manage the job request in the *Scheduled Job Manager* admin tool. See Related Information for details.

Task overview: Importing or Exporting Background Information with Attachments [page 153]

Related Information

Uploading Attachments to an SFTP Server for Bulk Import [page 154]
Importing Background Information and Attachments [page 157]
Managing Scheduled Jobs in Admin Center
Creating a Scheduled Job Request in Admin Center

6.4 Managing Profile Photos for Employees

Employees can personalize their profiles by adding profile photos manually to the People Profile page. As an administrator, you can upload or export multiple profile photos at once through a scheduled job in the Admin Center. Before bulk upload, you must prepare employee photos and a CSV file that maps the photos to existing usernames according to file requirements.

The tasks in this section apply to both the legacy and latest People Profile.

> Note
>
> An employee with mutiple employment records (usernames) should only have one profile photo. So if you import photos for such an employee, we recommend that you only upload a photo for one of the employments. After the import, all the employments will share the single profile photo.
>
> If you instead upload multiple photos for the employee in one import file, only one photo is selected and shared by all the employments.

File Requirements [page 163]
Before uploading employee photos, follow the file requirements to prepare employee photos and a CSV file that is used to map photos to users. If necessary, compress the large amounts of photos into one or multiple ZIP files.

Uploading Multiple Profile Photos [page 166]
Create a job request to upload multiple profile photos for employees to the system in the *Scheduled Job Manager* admin tool.

Exporting Multiple Profile Photos [page 168]
Create a job request to export multiple profile photos for employees at once in the *Scheduled Job Manager* admin tool.

Parent topic: Managing Extended User Information by Using Data Files [page 138]

Related Information

Extended User Information [page 138]
Adding or Updating Extended User Information [page 142]
Importing or Exporting Background Information with Attachments [page 153]

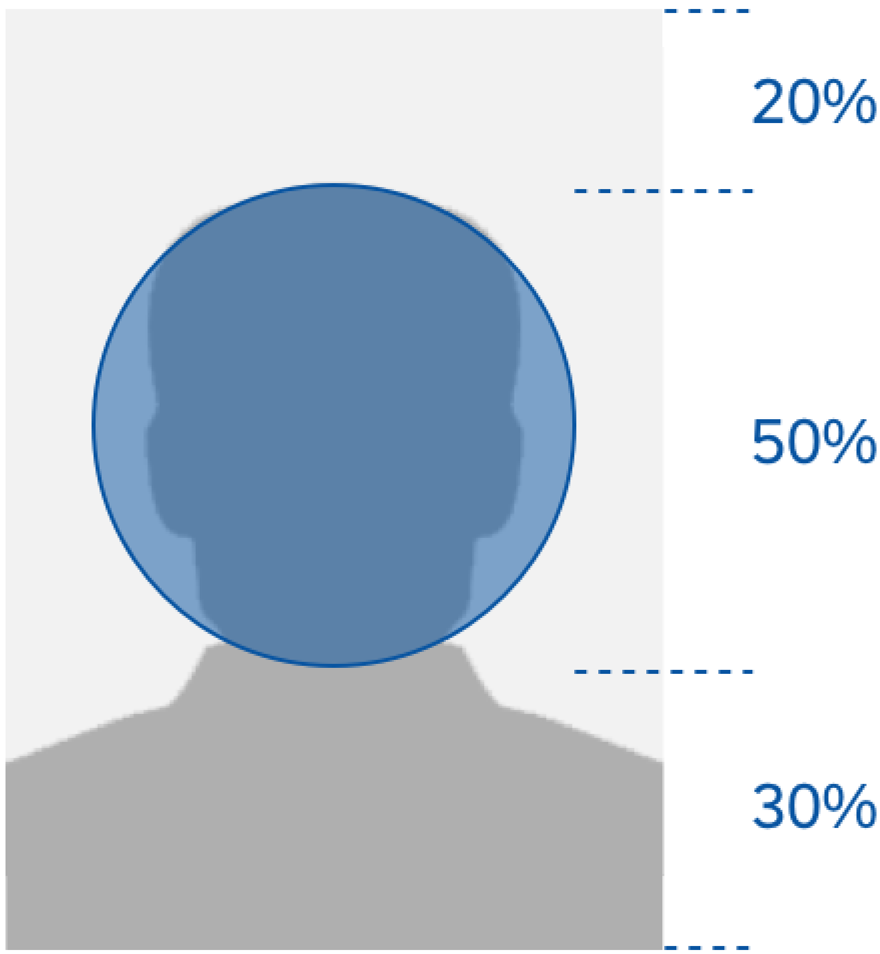
6.4.1 File Requirements

Before uploading employee photos, follow the file requirements to prepare employee photos and a CSV file that is used to map photos to users. If necessary, compress the large amounts of photos into one or multiple ZIP files.

Requirements for Profile Photos

The profile photos must meet the following requirements:

- **Photo size**
  Each photo must be 2 MB or less. The recommended size is 100 KB.
- **Photo format**
  JPG format only. If your photos are in other formats, convert them into JPG format.
- **Aspect ratio**
  3:4 is preferred for optimal display results.
- **Dimension in pixels**
  The recommend dimension is 180 pixels in width and 240 pixels in height.
- **File names**
  Photo names must not contain spaces. Use dashes or underscores to replace spaces.
- **Show the whole face in cropped photos**
  The profile photos are cropped to a circular shape on the People Profile. To ensure that the whole face is displayed properly, we recommend that the face is positioned within the circular crop area as follows:



Requirements for Zipped Photos

For optimized import performance, you can compress large amounts of photos into one or more ZIP files for a job of photo upload. The ZIP files must meet the following requirements:

- The photo names must follow the character encoding specified for the job.
- To upload a single ZIP file in a job, the ZIP file and CSV file must have the same name.
- To upload multiple ZIP files in a job, the ZIP file names must follow the pattern: <CSV filename>_<sequence number>.

> **Example**
>
> The CSV file name is `example.csv` and you prepared three ZIP files of photos for a job. The corresponding three ZIP file names are `example_1.zip`, `example_2.zip`, and `example_3.zip`.

> **Note**
>
> If the CSV file name includes a date, don't include the date in the file name for ZIP files.
>
> For example, if the CSV file name is `instance123_photos_210720.csv`, the ZIP file name must be `instance123_photos_.zip`, or `instance123_photos__1.zip` and `instance123_photos__2.zip` for multiple ZIP files.

Requirements for the CSV File

The CSV file must meet the following requirements:

- **We recommend naming the CSV file as <instanceID>_photos_<YYMMDD>.csv.**
  The "instanceID" is the company instance name, and the "YYMMDD" is the date when the scheduled job runs.
- **The table must contain two columns only: a *Username* column followed by a *Filename* column.**
  In each row, enter an existing username in the *Username* column and a file name in the *Filename* column to create a mapping. All names are case-sensitive. Example:

	A	B
1	Username	Filename
2	aaaa	aaaa.jpg
3	bbbb	bbbb.jpg
4	cccc	cccc.jpg
5	dddd	dddd.jpg
6	eeee	eeee.jpg
7	ffff	ffff.jpg
8	gggg	gggg.jpg

> **Tip**
>
> To get the list of employee usernames in the instance, go to the *Manage Users* tool in *Admin Center*, or you can export the full user list with the *Employee Export* tool in *Admin Center*.

- **The maximum number of photo entries in a single CSV file is 5000.**
  If you have more than 5000 photos to upload, split them into multiple CSV files and schedule an upload job for each file. For optimal performance, we recommend that you split the photos into batches of similar sizes. If your jobs take too much time to complete, consider splitting the CSV files into even smaller chunks.

> **Caution**
>
> If you prepare multiple CSV files for parallel jobs, do not put the same username in more than one file. Overlapping in usernames can lead to job failure.

Parent topic: Managing Profile Photos for Employees [page 162]

Related Information

Uploading Multiple Profile Photos [page 166]
Exporting Multiple Profile Photos [page 168]

6.4.2 Uploading Multiple Profile Photos

Create a job request to upload multiple profile photos for employees to the system in the *Scheduled Job Manager* admin tool.

Prerequisites

- You've prepared profile photos or compressed photos, and a CSV mapping file that meet the requirements specified in File Requirements [page 163]. If you want to schedule multiple jobs that run in parallel, prepare one CSV file for each job.
- You've uploaded the photos and CSV files to a directory on the SFTP server.
  For security reasons, we recommend that you use SAP SuccessFactors hosted SFTP server. In case you don't have an SFTP account, contact your Partner or Technical Support.
- You have the following permissions:
  - *Admin Center Permissions* > *Monitor Scheduled Jobs*
  - *Admin Center Permissions* > *Manage Scheduled Jobs*
  - *Manage User* > *Bulk Upload Profile Photos*

Context

> **Note**
>
> This job can be scheduled to run up to 10 times per day in the Admin Center. The daily execution times are counted based on server time.

Procedure

1. Go to *Admin Center* > *Scheduled Job Manager*.

2. On the *Job Scheduler* tab, choose *Create Job Request*.
3. In the *Job Definition* section, enter the following information.

Setting	Description
Job Name	The name given to the job.
Job Type	Select the option *Bulk Upload Profile Photos*.
Job Owner	The job owner must be the person who created this job request.

4. Select an appropriate option for *Character Encoding*.

> → Remember
>
> Photo names must follow the character encoding specified for the job.

5. **Optional:** Check one or more options in *Job Parameters* settings if necessary.

Options	Description
Upload Zipped Photos	Select this option if you're uploading photos in ZIP files.
Delete All Photos from the FTP Server After Upload	All photos, including compressed photos, are deleted from the server once they are uploaded. ⓘ Note You must select this option if you use an SAP Success-Factors hosted SFTP server.

6. In the *FTP Configuration* section, enter information about the server access and file access.

> ⓘ Note
>
> We recommend that you use an SFTP server for stability and security.

7. In the *Job Occurrence* section, define how frequently you want the job to run.
8. In the *Notification* section, define who receives email notifications besides the job owner.
9. To finish, choose one of two options:
   - Choose *Submit* to save the job request and submit it to the job scheduler, so that the job is scheduled to run at the specified time.
   - Choose *Save* to save the job request, but not submit it. Configurations are saved but the job isn't scheduled to run yet.

Next Steps

You can monitor and manage the job request in the *Scheduled Job Manager* admin tool. See Related Information for details.

After the job is completed, two entries are displayed on the *Job Monitor* tab in *Scheduled Job Manager* in the following order:

1. A job named *Triggered by the Job Request <Your Job Request ID>* of the job type *Batch Upload Employee Photos*: this is a job in Provisioning triggered by your job request.
2. The job request that you created

> → Tip
>
> You can find more information about the job progress in the run details of the triggered job *Triggered by the Job Request <Your Job Request ID>*.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Task overview: Managing Profile Photos for Employees [page 162]

Related Information

File Requirements [page 163]
Exporting Multiple Profile Photos [page 168]

6.4.3 Exporting Multiple Profile Photos

Create a job request to export multiple profile photos for employees at once in the *Scheduled Job Manager* admin tool.

Prerequisites

You have the following permissions:

- *Admin Center Permissions* > *Monitor Scheduled Jobs*
- *Admin Center Permissions* > *Manage Scheduled Jobs*
- *Manage User* > *Bulk Export Profile Photos*

Context

> ⓘ Note
>
> This job can be scheduled to run up to 10 times a day in the Admin Center. The daily execution times are counted based on server time.

Procedure

1. Go to *Admin Center* > *Scheduled Job Manager*.
2. On the *Job Scheduler* tab, choose *Create Job Request*.
3. Create a job request of the job type *Bulk Export Profile Photos*.

   The job owner must be the person who created this job request.
4. Fill in all the required fields.

   > ⓘ Note
   >
   > - *Character Encoding*: Photo names must follow the character encoding specified for the job.
   > - *File Name*: Because file names of the exported files are generated by the system after exported, you can enter any text in the required field.
   > - *Encryption*: Choose *None* for this field. Because of large data volume, currently we don't support file encryption for bulk exporting employee photos.
5. To finish, choose one of two options:
   - Choose *Submit* to save the job request and submit it to the job scheduler, so that the job is scheduled to run at the specified time.
   - Choose *Save* to save the job request, but not submit it. Configurations are saved but the job isn't scheduled to run yet.

Results

After the job is completed, two entries are displayed on the *Job Monitor* tab in *Scheduled Job Manager* in the following order:

1. A job named *Triggered by the Job Request <Your Job Request ID>* of the job type *Batch Export Employee Photos*: this is a job in Provisioning triggered by your job request.
2. The job request that you created

One or more ZIP files consisting of a CSV file and photo files are exported. A ZIP file contains a maximum of 5000 photos. In the CSV file, there are "username" and "filename" columns and the "filename" column contains the corresponding photo names. The exported ZIP file names follow this pattern: `<instanceID>_photos_<YYMMDD>_<timestamp>.zip`.

You receive an email about the export results.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Next Steps

You can monitor and manage the job request in the *Scheduled Job Manager* admin tool. See Related Information for details.

→ Tip

You can find more information about the job progress in the run details of the triggered job *Triggered by the Job Request <Your Job Request ID>*.

Task overview: Managing Profile Photos for Employees [page 162]

Related Information

File Requirements [page 163]
Uploading Multiple Profile Photos [page 166]

7 Managing Users with OData APIs

Beside managing user information on the UI and using file imports, you can also use the `User` API to create and update users. All fields in the Basic User Information and Extended User Information are available in the User entity.

Prerequisites

You have the permission to access the `User` OData entity.

Context

You can find detailed examples on how to create and update users in the API reference for the User entity. We recommend that you use OData API instead of SFAPI to create and update users. SFAPI has been deprecated since August 2018 and will soon be retired.

Procedure

- To create a user and set the initial password, make an API call to the `User` entity.

  Here's an example request payload of creating a user using the OData API:

  Request

  OData Request to Create a User

Operation	Insert
HTTP Method	POST
URI	`https://<API-Server>/odata/v2/User`

Payload	`{ "__metadata":{ "uri":"User('acraig')", "type":"SFOData.User" }, "userId":"acraig", "assignmentIdExternal":"acraig", "status":"t", "firstName":"Amy", "lastName":"Craig", "email":"amy.craig@bestrun.com" }`

> ⓘ Note
>
> In this example, user password isn't specified in the request payload. The system generates a random password and sends it to the user. You can also explicitly include the password value in the payload. However, this is considered unsafe and therefore not recommended. Upon the first login, all new users are required to reset the initial password.

- To update user information, you can use upsert, merge, or replace operations and include the user fields in the payload.

  For more information about OData operations, see the SAP SuccessFactors HCM suite OData API: Developer Guide.

  The following example shows how to reset a user's password using the merge operation:

  Request

  OData Request to Update User Password

Operation	Merge
HTTP Method	POST
URI	`https://<API-Server>/odata/v2/User('acraig')`
Header	`x-http-method: MERGE`
Payload	`{ "password":"Xwe78nyE3" }`

Next Steps

For new users, log into the system and reset the password.

For existing users, if the password is updated by an API admin, they're required to reset the password upon login. If the password is updated by the user themselves, no action is required.

Related Information

User

8 Overview of SAP SuccessFactors Workforce System for Cross-Domain Identity Management API

SAP SuccessFactors Workforce SCIM API provides System for Cross-domain Identity Management (SCIM) 2.0 REST APIs to help you better manage user accounts and user groups. For detailed information about these APIs, see SAP SuccessFactors Workforce SCIM API on SAP API Business Hub.

API Resources

- Supported APIs: `Users` and `Groups`
  - `Users` APIs: You can create, replace, search for, and delete users.

    > **Note**
    >
    > - When you change the status of user account's person from valid to invalid, which means this person can no longer be found in the system, user account status is moved from active to inactive as well.
    > - You can use the SCIM `Users` APIs to update account attributes. For example, person work email address, work phone, or work fax number.
    > - Creating user account through SCIM API isn't recommended. Currently, SAP SuccessFactors works mainly as a source system for identities of workforce persons.
    > - For better data consistency, we recommend that you use data purge tool (see Related Information) to purge identity accounts instead of using SCIM APIs.

  - `Groups` APIs: You can search for permission groups and synthetic groups such as Common Data Model Content Deep-Link Access User Group, Mobile Access User Group, and Story Report Access User Group. See more details on Mobile users and Story Report in Related Information section. You can also add members to or remove members from an existing static permission group. Creating or deleting groups using the `Groups` APIs isn't supported.

    > **Note**
    >
    > The `Groups` patch API only supports updating membership of static permission groups. Because members in dynamic permission groups are automatically selected by attributes, for example, by department. You can batch add or remove up to 1000 user accounts. Replacing members is also supported.

    > **Note**
    >
    > There are fields that don't support the POST(CREATE), PUT, PATCH operations of Workforce SCIM APIs. See the "Read Only" column in the *Mapping Between SCIM Users and ODATA User* topic.

- Endpoint: https://<api-server>/rest/iam/scim/v2/Users and /rest/iam/scim/v2/Groups

Prerequisites

SCIM APIs don't support case-sensitive usernames. To use SCIM APIs in this section, enable the *Enable Case-Insensitive Usernames* option in Admin Center.

- *Enable Case-Insensitive Usernames* only supports SAML SSO. Enable the option in *Admin Center* > *Company System and Logo Settings*.
- Before you enable the *Enable Case-Insensitive Username* option, check for duplicate usernames in *Admin Center* > *Check Tool* > *Migration* > *Application* > *User Account Management* > *There are no duplicate usernames in the case-insensitive mode.*

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Permissions

Role-Based Permissions for SAP SuccessFactors Workforce SCIM API

Permissions	Descriptions
Administrator > *Manage Identity Account and Group* > *Read Access to SCIM User API*	This permission allows you to query user resources. For example, you can make below three queries: • /rest/iam/scim/v2/Users/{id} • /rest/iam/scim/v2/Users • /rest/iam/scim/v2/Users/.search
Administrator > *Manage Identity Account and Group* > *Edit Access to SCIM User API*	This permission allows you to delete, post, put, and patch user resources.
Administrator > *Manage User* > *Employee Export*	This permission allows you to post, put, patch, query user resources within your target population. To be able to update employee and onboardee accounts, don't forget to configure appropriate target population (employee and onboardee).
Administrator > *Manage Identity Account and Group* > *Read Access to SCIM Group API*	This permission allows you to query group resources.
Administrator > *Manage Identity Account and Group* > *Edit Access to SCIM Group API for Membership Assignment*	This permission allows you to edit the membership of static permission groups using the SCIM Group API.

Additional Permissions for Updating Employee Central Import Entities

Permissions	Descriptions
Administrator > *Employee Central Import Entities* > *Phone Information, Employee Data* > *Business Phone* of *Write* access	This permission allows you to update work phone of an employee. To be able to update employee and onboardee accounts, don't forget to configure appropriate target population (employee and onboardee).

Permissions	Descriptions
Administrator > *Employee Central Import Entities* > *Phone Information, Employee Data* > *Business Fax* of *Write* access	This permission allows you to update fax information of an employee. To be able to update employee and onboardee accounts, don't forget to configure appropriate target population (employee and onboardee).
Administrator > *Employee Central Import Entities* > *Phone Information, Employee Data* > *Email* of *Write* access	This permission allows you to update email information of an employee. To be able to update employee and onboardee accounts, don't forget to configure appropriate target population (employee and onboardee).

Related Information

List of SAP SuccessFactors API Servers
Mapping Between SCIM Users and ODATA User [page 183]
Data Purge
Stories in People Analytics

8.1 Create a User

The following example shows how to create a user.

> Note
>
> `userName`, `userType`, and `active` are **required** fields.
>
> At least one of `perPersonUuid` and `personIdExternal`, respectively person ID and UUID in Employee Central, is also **required**. If both are given, only `perPersonUuid` is used to get information from Employee Central.

Request

HTTP Method	POST
URI	`https://<api-server>/rest/iam/scim/v2/Users`

Request Body

```
{
  "schemas": [

"urn:ietf:params:scim:schemas:extension:successfactors:2.0:U
ser",
    "urn:ietf:params:scim:schemas:core:2.0:User",
    "urn:ietf:params:scim:schemas:extension:sap:2.0:User",

"urn:ietf:params:scim:schemas:extension:enterprise:2.0:User"
  ],
  "externalId": "example_22072201",
  "userName": "example_22072201",
  "userType": "EMPLOYEE",
  "locale": "zh_CN",
  "timezone": "CST",
  "active": true,
  "phoneNumbers": [
    {
        "value": "12345",
        "type": "work",
        "primary": true
    },
    {
        "value": "67890",
        "type": "fax",
        "primary": false
    }
  ],
  "emails": [
    {
        "value": "1@email.com",
        "type": "work",
        "primary": true
    }
  ],

"urn:ietf:params:scim:schemas:extension:successfactors:2.0:U
ser": {
       "perPersonUuid": "73C9C586F9284B77B6116F0E18BDBFA4",
       "personIdExternal": "jreed1",
       "loginMethod": "sso"
  },
  "urn:ietf:params:scim:schemas:extension:sap:2.0:User": {
        "userUuid": "example_22072201"
    }
}
```

Response

Besides the fields you provided in the request body, you can also see some Employee Central data such as custom fields and manager information.

```
{
    "schemas": [
        "urn:ietf:params:scim:schemas:extension:successfactors:2.0:User",
        "urn:ietf:params:scim:schemas:core:2.0:User",
        "urn:ietf:params:scim:schemas:extension:sap:2.0:User",
        "urn:ietf:params:scim:schemas:extension:enterprise:2.0:User"
    ],
    "meta": {
        "resourceType": "User",
        "created": "2022-07-22T06:14:58.000Z",
        "lastModified": "2022-07-22T06:14:58.000Z",
        "location": "/rest/iam/scim/v2/Users/01ac8431-7c0f-4a70-a8f6-57610214cc5c",
        "version": "2.0.0"
```

```
    },
    "id": "01ac8431-7c0f-4a70-a8f6-57610214cc5c",
    "externalId": "example_22072201",
    "userName": "example_22072201",
    "name": {
        "formatted": "User 1096",
        "familyName": "1096",
        "givenName": "User",
        "middleName": null,
        "honorificPrefix": "Sr. Software Engineer",
    },
    "locale": "zh_CN",
    "timezone": "CST",
    "userType": "EMPLOYEE",
    "active": true,
    "displayName": "User 1096",
    "emails": [
        {
            "type": "work",
            "value": "1@email.com",
            "primary": true
        }
    ],
    "title": "Sr. Software Engineer",
    "urn:ietf:params:scim:schemas:extension:successfactors:2.0:User": {
        "perPersonUuid": "73C9C586F9284B77B6116F0E18BDBFA4",
        "loginMethod": "sso",
        "personIdExternal": "User1096",
        "customFields": [
            {
                "value": "CF1_001",
                "customFieldName": "custom01",
                "display": "Preferred Name"
            },
            {
                "value": "CF2_001",
                "customFieldName": "custom02",
                "display": "Extension"
            }
        ]
    },
    "urn:ietf:params:scim:schemas:extension:enterprise:2.0:User": {
        "department": "N/A",
        "division": "N/A",
        "manager": {
            "value": "cf92175f-2327-c212-e12c-00000a746432",
            "displayName": "Deepika Chauhan",
            "$ref": "/rest/iam/scim/v2/Users/cf92175f-2327-c212-e12c-00000a746432"
        }
    },
    "phoneNumbers": [
        {
            "value": "12345",
            "type": "work",
            "primary": true
        },
        {
            "value": "67890",
            "type": "fax",
            "primary": false
        }
    ],
    "groups": [],
    "urn:ietf:params:scim:schemas:extension:sap:2.0:User": {
        "userUuid": "example_22072201"
    }
}
```

8.2 Replace a User

The following example shows how to replace all the information of a user.

> ⓘ Note
>
> When you replace a user, include all fields and their values in the request body. Fields not included in the request body are updated with value `null`.

Request

HTTP Method	PUT
URI	https://<api-server>/rest/iam/scim/v2/Users/dc93175f-2327-c212-e12c-00000a746432
Request Body	(see below)

```
{
    "schemas": [

"urn:ietf:params:scim:schemas:extension:successfactors:2.0:U
ser",
        "urn:ietf:params:scim:schemas:core:2.0:User",

"urn:ietf:params:scim:schemas:extension:sap:2.0:User",

"urn:ietf:params:scim:schemas:extension:enterprise:2.0:User"
    ],
    "externalId": "test_211150015",
    "userName": "test_211150015",
    "userType": "EMPLOYEE",
    "locale": "zh_CN",
    "timezone": "Asia/Shanghai",
    "active": true,
    "emails": [
        {
            "value": "test@email.com",
            "type": "work",
            "primary": true
        }
    ],
    "phoneNumbers": [
        {
            "value": "12345",
            "type": "work",
            "display" : null,
            "primary": true
        }
    ],

"urn:ietf:params:scim:schemas:extension:successfactors:2.0:U
ser": {
        "perPersonUuid": "C5D09007A03F4914A9906346CD0F776D",
        "loginMethod": "pwd",
        "personIdExternal": "z3"
    },
    "urn:ietf:params:scim:schemas:extension:sap:2.0:User": {
        "userUuid": "testUserUuidqqqqwwwww2"
    }
}
```

Response


```
{
    "schemas": [
        "urn:ietf:params:scim:schemas:extension:successfactors:2.0:User",
        "urn:ietf:params:scim:schemas:core:2.0:User",
        "urn:ietf:params:scim:schemas:extension:sap:2.0:User",
        "urn:ietf:params:scim:schemas:extension:enterprise:2.0:User"
    ],
    "meta": {
        "resourceType": "User",
        "created": "2011-09-08T00:16:46Z",
        "lastModified": "2022-08-17T09:27:29Z",
        "location": "/rest/iam/scim/v2/Users/dc93175f-2327-c212-e12c-00000a746432",
        "version": "2.0.0"
    },
    "id": "dc93175f-2327-c212-e12c-00000a746432",
    "externalId": "test_211150015",
    "userName": "test_211150015",
    "name": {
        "formatted": "testFormatted",
        "familyName": "testFamilyName",
        "givenName": "testGivenName"
    },
    "locale": "zh_CN",
    "timezone": "Asia/Shanghai",
    "userType": "EMPLOYEE",
    "active": true,
    "displayName": "z 3",
    "emails": [
        {
            "type": "work",
            "value": "test@email.com",
            "primary": true
        }
    ],
    "urn:ietf:params:scim:schemas:extension:successfactors:2.0:User": {
        "perPersonUuid": "C5D09007A03F4914A9906346CD0F776D",
        "loginMethod": "pwd",
        "personIdExternal": "z3"
    },
    "urn:ietf:params:scim:schemas:extension:enterprise:2.0:User": {
        "department": "N/A",
        "division": "N/A",
        "manager": {}
    },
    "phoneNumbers": [
        {
            "value": "12345",
            "type": "work",
            "primary": true
        }
    ],
    "urn:ietf:params:scim:schemas:extension:sap:2.0:User": {
        "userUuid": "testUserUuidqqqqwwwww2"
    }
```

8.3 Modify a User

The following example shows how to modify some specific information of a user.

Request

HTTP Method	PATCH
URI	`https://<api-server>/rest/iam/scim/v2/Users/a44857b5-ad0e-4d45-981d-af3b33974b0c`
Request Body	(see below)

```
{
  "schemas": [
    "urn:ietf:params:scim:api:messages:2.0:PatchOp"
  ],
  "Operations": [
    {
      "op": "add",
      "path": "externalId",
      "value": "testScimExternalId"
    },
    {
      "op": "remove",
      "path": "phoneNumbers[type eq \"home\"]"
    },
    {
      "op": "replace",
      "path": "emails",
      "value": [
        {
          "type": "work",
          "value": "test2@testmail.com",
          "primary": "true"
        }
      ]
    }
  ]
}
```

Response

```
{
    "schemas": [
        "urn:ietf:params:scim:schemas:extension:successfactors:2.0:User",
        "urn:ietf:params:scim:schemas:core:2.0:User",
        "urn:ietf:params:scim:schemas:extension:sap:2.0:User",
        "urn:ietf:params:scim:schemas:extension:enterprise:2.0:User"
    ],
    "meta": {
        "resourceType": "User",
        "created": "2022-07-13T12:54:06Z",
        "lastModified": "2022-08-17T08:02:35Z",
        "location": "/rest/iam/scim/v2/Users/a44857b5-ad0e-4d45-981d-af3b33974b0c",
        "version": "2.0.0"
    },
    "id": "a44857b5-ad0e-4d45-981d-af3b33974b0c",
    "externalId": "testScimExternalId",
    "userName": "scimModifyAPIDemo",
    "name": {
        "formatted": "scimModifyAPIDemoFirstName mi1 scimModifyAPIDemoLastName",
        "familyName": "scimModifyAPIDemoLastName",
        "givenName": "scimModifyAPIDemoFirstName",
```

```
        "middleName": "mi1",
        "honorificPrefix": "title01"
    },
    "locale": "en_GS",
    "timezone": "CMT-8",
    "userType": "EMPLOYEE",
    "active": true,
    "displayName": "scimModifyAPIDemoFirstName mi1 scimModifyAPIDemoLastName",
    "emails": [
        {
            "type": "work",
            "value": "test2@testmail.com",
            "primary": true
        }
    ],
    "title": "title01",
    "urn:ietf:params:scim:schemas:extension:successfactors:2.0:User": {
        "perPersonUuid": "E2979B4675CB4CEF8CDDADAF6F494A9C",
        "loginMethod": "SSO",
        "personIdExternal": "scimModifyAPIDemo",
        "customFields": [
            {
                "value": "CF1_001",
                "customFieldName": "custom01",
                "display": "Preferred Name"
            },
            {
                "value": "CF2_001",
                "customFieldName": "custom02",
                "display": "Extension"
            }
        ]
    },
    "urn:ietf:params:scim:schemas:extension:enterprise:2.0:User": {
        "department": "scimModifyAPIDemoDepart",
        "division": "32050Division",
        "manager": {}
    },
    "phoneNumbers": [
        {
           "value": "phone01",
            "type": "work",
            "primary": true
        }
    ],
    "urn:ietf:params:scim:schemas:extension:sap:2.0:User": {}
}
```

8.4 Delete a User

The following example shows how to delete a user account.

Request

HTTP Method	DELETE
URI	`https://<api-server>/rest/iam/scim/v2/Users/00008b9c-4818-4a0a-8403-a7dd9d6cc53z`

Response

The response status 204 (No Content) means that the user was deleted.

8.5 Mapping Between SCIM Users and ODATA User

Here's a table of data mapping between SCIM user and ODATA user.

Mapping Between SCIM User and ODATA User

SCIM Attribute	Sub Attribute	Read Only	ODATA Field	Description
id		Y	personKeyNav/userAccountNav/accountUuid	
externalId			N/A	Domain: Account
userName			personKeyNav/userAccountNav/username	• Domain: Account • The login name of the login account.
name	formatted	Y	defaultFullName or displayName	If the *Admin Center > Company System and Logo Settings > Enable adoption of General Display Name* option is enabled, map to displayName. If not, map to defaultFullName.
	familyName	Y	lastName	
	givenName	Y	firstName	
	middleName	Y	mi	
	honorificPrefix	Y	salutation	
	honorificSuffix	Y	suffix	
displayName		Y	defaultFullName or displayName	• Domain: Person • If the *Admin Center > Company System and Logo Settings > Enable adoption of General Display Name* option is enabled, map to displayName. If not, map to defaultFullName.
nickName		Y	nickname	

SCIM Attribute	Sub Attribute	Read Only	ODATA Field	Description
title		Y	title	
userType			personKeyNav/userAccountNav/userType	
preferredLanguage		Y	personKeyNav/userAccountNav/defaultLocale	
locale			personKeyNav/userAccountNav/defaultLocale	
timezone			personKeyNav/userAccountNav/timeZone	
active			personKeyNav/userAccountNav/accountStatus	
emails	value		email	
	type		N/A	Upon query, return `work` as type value for employees. Upon query, return `other` as type value for new hires.
	primary		N/A	
phoneNumbers	value		businessPhone/fax	Domain: Person
	type		N/A	Supported values are "work" and "fax": • "work" for phone • "fax" for fax Upon query, return `work` and `fax` as type values for employees. Upon query, return `other` and `fax` as type values for new hires.
	display		N/A	
	primary		N/A	
groups	value	Y	N/A	Domain: Permission Groups
	$ref		N/A	
	type		N/A	

SCIM Attribute	Sub Attribute	Read Only	ODATA Field	Description
urn:ietf:params:scim:schemas:extension:sap:2.0:User.groupDomains		Y	Value	
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.employeeNumber (using personIdExternal)	display	Y	N/A	
urn:ietf:params:scim:schemas:extension:sap:2.0:User.userUuid			personKeyNav/userAccountNav/sapGlobalUserId	
urn:ietf:params:scim:schemas:extension:successfactors:2.0:User.perPersonUuid			personKeyNav/perPersonUuid	
urn:ietf:params:scim:schemas:extension:sap.workforce:2.0:User.perPersonUuid			personKeyNav/perPersonUuid	
urn:ietf:params:scim:schemas:extension:successfactors:2.0:User.loginMethod			N/A	
urn:ietf:params:scim:schemas:extension:sap.workforce:2.0:User.loginMethod				
urn:ietf:params:scim:schemas:extension:successfactors:2.0:User.personIdExternal			personKeyNav/personIdExternal	
urn:ietf:params:scim:schemas:extension:sap.workforce:2.0:User.personIdExternal			personKeyNav/personIdExternal	

SCIM Attribute	Sub Attribute	Read Only	ODATA Field	Description
urn:ietf:params:scim:schemas:extension:successfactors:2.0:User.customFields	value	Y	custom01 - custom15	Domain: Primary Assignment
urn:ietf:params:scim:schemas:extension:sap.workforce:2.0:User.customFields	value	Y	custom01 - custom15	Domain: Primary Assignment
	customFieldName		N/A	"custom01" - "custom15"
	display		N/A	
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.department		Y	department	Domain: Primary Assignment
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.division		Y	division	Domain: Primary Assignment
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.manager	value	Y	manager/personKeyNav/userAccountNav/accountUuid	
	$ref		N/A	Generated from value
	displayName		manager/ (defaultFullName or displayName)	If the *Admin Center* > *Company System and Logo Settings* > *Enable adoption of General Display Name* option is enabled, map to displayName. If not, map to defaultFullName.
urn:ietf:params:scim:schemas:extension:sap.workforce:2.0:User:lastDeactivated		Y		
urn:ietf:params:scim:schemas:extension:sap.workforce:2.0:User:empId		Y	empId	Domain: Primary Assignment

8.6 Managing Workforce SCIM API Attributes

You can enable or disable Workforce SCIM API attributes to control what data can be returned using Workforce SCIM APIs.

Prerequisites

You have the *Administrator* > *Manage Identity Account and Group* > *Manage Workforce SCIM API Attributes* permission.

Procedure

1. Go to *Admin Center* > *Manage Workforce SCIM API Attributes*.

   The *Manage Workforce SCIM API Attributes* page displays. You can see two major attribute categories:
   - *User Attributes*: You can use Workforce SCIM User APIs to get data about account, person, primary assignment, and permission group.
   - *Group Attributes*: You can use Workforce SCIM Group APIs to get data about permission group and group membership.
2. Select or unselect attributes to enable or disable them.

   > Note
   >
   > If an attribute is configured in Succession Data Model (SDM), an *SDM* flag is added to the attribute. Attributes with *SDM* flag are also dependent on your Succession Data Model configuration. If this attribute is removed from Succession Data Model, the attribute, checked or unchecked, is grayed out on the Manage Workforce SCIM API Attributes page and no response results on the attribute are returned by the SCIM API.
3. Save your changes.

Results

All your changes on this admin page take effect immediately upon saving.

8.7 Filtering Permission Groups to Be Returned by Workforce SCIM APIs

You can predefine filtering conditions of permission groups to be returned by Workforce SCIM APIs, including Workforce User APIs and Workforce Group APIs, using the *Filter Permission Groups to be Returned by Workforce SCIM APIs* admin tool.

Prerequisites

- You have the *Administrator Permissions* > *Manage Identity Account and Group* > *Filter Permission Groups to be Returned by Workforce SCIM APIs* permission.
- You're an RBP administrator of at least *View* access to use the *Groups In* filter of the admin tool.

Procedure

1. Go to *Admin Center* > *Filter Permission Groups to be Returned by Workforce SCIM API*.

   The *Filter Permission Groups to be Returned by Workforce SCIM APIs* admin page is displayed.
2. Add filters in the *Condition Setting* section.

Field	Description
Groups in	Choose the value help icon to select groups. You can select up to 100 permission groups.
Group Name Contains	Input up to 5 keywords. This field is case insensitive. To ensure optimal performance, enter at least two characters for a keyword.
User Type in	Select one or more user types in the dropdown. Supported values are *Employee*, *External Onboarding User*, and *Alumni*.

3. To exclude RBP-only permission groups, select *Exclude All RBP-Only Permission Groups*.
4. Save your changes.

   A double-confirmation popup displays.
5. Choose *Confirm*.

Results

You've successfully excluded permission groups matching the filters you set from being returned by Workforce SCIM APIs. Your saved changes take effect immediately. If you don't configure any filters on this page, by default all permission groups can be returned by Workforce SCIM APIs.

9 Managing Identity Authentication/Identity Provisioning Real Time Sync

You can use the *Manage Identity Authentication/Identity Provisioning Real Time Sync* admin tool to sync user account changes to Identity Authentication Service in real time. Please note that *Manage Identity Authentication/ Identity Provisioning Real Time Sync* only supports the onboardee user account type. You can trigger real time sync whenever there's a new onboardee account being created, or there are any changes to the onboardee account login name, account status, or account type.

Prerequisites

- You have the *Manage Identity Authentication/Identity Provisioning Real Time Sync* permission.
- You've registered Identity Provisioning Service connection in *Integration Service Registration Center*.

Context

- To know more background information about real-time provisioning, see Real-Time Provisioning: Identity Authentication.
- To prepare a certificate in Security Center, see the *Security Center* topic in Related Information.
- To register your tenant for services hosted on SAP Business Technology Platform, see the *Registering your Tenant for an Integration Service* topic in Related Information.

Procedure

1. Go to *Admin Center* > *Manage Identity Authentication/Identity Provisioning Real Time Sync*.
2. Turn on *Enable Real Time Sync*.
3. Select user account types to be synchronized with Identity Authentication Service/Identity Provisioning Service.

   > Note
   >
   > As of 2H 2022, the *Manage Identity Authentication/Identity Provisioning Real Time Sync* admin tool only supports the real-time sync of the *Onboardee* user account type.

4. Save your changes.

Results

You've successfully enabled the real-time sync of the selected user types.

Next Steps

- When you're generating a certificate, once you set the validity for the certificate, select the *Renew on Expiry* check box to enable the automatic renewal of the certificate.
- Selecting the *Renew on Expiry* check box spares you manual effort for renewing your certificate for cloud infrastructure-based tenant. However, if your target tenant is NEO-based, you still need to manually download and upload the latest certificate to the target tenant.

Related Information

Registering your Tenant for an Integration Service
Security Center
X509 Certificates Field Descriptions

10 Managing Identity Time Zone Mapping

In SAP SuccessFactors, you can customize time zones using various formats, for example, picklists and strings. But in SAP Identity Authentication Services, only standard time zone format is supported. To ensure a smooth integration with Identity Authentication Services and to avoid time zone mismatches, you can use the *Manage Identity Time Zone Mapping* admin tool to configure time zone mappings.

You can use the admin tool to do the following tasks:

- Enable time zone mapping.
- Set a default time zone mapping.
- Add a new time zone mapping.
- Select primary time zone mappings.
- Edit or delete an existing time zone mapping.

10.1 Enabling Identity Time Zone Mapping

You can enable the *Manage Identity Time Zone Mapping* admin tool to map the time zones you used in SAP SuccessFactors to standard time zones used in Workforce SCIM APIs.

Prerequisites

You have the *Manage Identity Time Zone Mapping* permission.

Context

Your configuration in the *Manage Identity Time Zone Mapping* admin tool takes effect and impact Workforce SCIM APIs immediately upon saving. We recommend that you review existing mappings and configure new mappings if needed before enabling the admin option.

Procedure

1. Go to *Admin Center* > *Manage Identity Time Zone Mapping*.

   The *Enable Time Zone Mapping* tab displays.
2. Turn on the *Enable Time Zone Mapping* field.

3. Select a default time zone for your company system in the *Select Default Time Zone Mapping* dropdown.
4. Save your changes.

Results

You've successfully enabled time zone mapping.

10.2 Adding a Time Zone Mapping

You can map a time zone used in your SAP SuccesFactors system to a standard time zone.

Prerequisites

You have the *Manage Identity Time Zone Mapping* permission.

Procedure

1. Go to *Admin Center* > *Manage Identity Time Zone Mapping*.
2. Go to the *Manage Time Zone Mapping* tab.
3. Choose + *Add*.

   The *Add a Time Zone Mapping* popup displays.
4. Select a standard time zone from the *Select a Standard Time Zone* dropdown.
5. Enter a time zone you used in your SAP SuccessFactors system in the *Enter a time zone for SAP SuccessFactors* field.

   > ⓘ Note
   >
   > The maximum input length of this field is 64 characters.
6. **Optional:** Set the mapping you just entered as the primary mapping.

   > ⓘ Note
   >
   > By default, the system sets the first mapping of each time zone as the primary mapping.
7. Choose *Add* to save your changes.

Results

You've successfully added a new time zone mapping.

10.3 Updating a Time Zone Mapping

You can edit an existing time zone mapping.

Prerequisites

You have the *Manage Identity Time Zone Mapping* permission.

Procedure

1. Go to *Admin Center* > *Manage Identity Time Zone Mapping*.
2. Go to the *Manage Time Zone Mapping* tab.
3. Choose *Edit* in the *Actions* column.

   The *Edit Time Zone Mapping* popup displays.
4. Make the changes you want.
5. Choose *Save*.

Results

You've successfully updated an existing time zone mapping.

10.4 Deleting a Time Zone Mapping

You can delete an existing time zone mapping.

Prerequisites

You have the *Manage Identity Time Zone Mapping* permission.

Procedure

1. Go to *Admin Center* > *Manage Identity Time Zone Mapping*.
2. Go to the *Manage Time Zone Mapping* tab.
3. Choose *Delete* in the *Actions* column.

   The *Delete Mapping* double-confirmation popup displays.
4. Choose *Yes*.

Results

You've successfully deleted a time zone mapping.

11 Using the Check Tool to Solve Issues

Get an overview of potential problems and errors in your configuration that you can try to solve yourself before you contact Technical Support about an issue.

Prerequisites

- You've enabled the Metadata Framework.
- You have the following *Administrator Permissions* > *Check Tool* permissions:
  - *Access Check Tool* authorizes users to access the tool.
  - *Allow Configuration Export* authorizes users to attach configuration information to a ticket.
  - *Allow Check Tool Quick Fix* authorizes users to run quick fixes for the checks that have this feature. A quick fix can be used to immediately correct any issues found by that check.

  For more information about role-based permissions, refer to List of Role-Based Permissions.

> → Tip
>
> Refer to Guided Answers for the Check Tool for a guided navigation through the available check tool checks and more information on each check.

Context

The check tool provides an overview of the issues found in the system. New checks that are being added in a new release go through a first initial run to return a result. After the initial run, checks are run on a regular basis (at least monthly). We recommend you open the check tool after you upgrade to a new release to see whether issues have been found by new checks.

In addition to these runs performed by the system, you can also run individual checks after you make changes to the system, for example, after updating data models or picklists. For more information, refer to the application-specific documentation.

Procedure

1. Go to *Admin Center* > *Check Tool* .

   The *Check Tool* page opens displaying the results of the first tab **System Health**.
2. Depending on the check type of the check you're interested in, select the corresponding tab.

Tab	Description
System Health	Displays configuration checks that have returned errors or warnings after the last run. We recommend you solve these in a timely manner. To display all checks, select all result types in the *Result Type* search filter and select *Go*.
Migration	Displays the migrations that are still pending, either because the check tool couldn't automatically migrate all issues or because new issues have been found after the last run. We recommend you solve these in a timely manner. To display all checks, turn on the *Show completed migrations also* search filter and select *Go*.
Validation	Displays a list of all validation checks. ⓘ Note Validation checks require one or more parameters for execution, therefore we can't run these checks automatically. You need to enter input parameters and run the corresponding check manually to get results.

3. To solve a check that returned issues, select it.

   The detail view opens to the right side of the screen with more information on the check and on how to solve the issue.
4. Evaluate the results and resolve the issues. If the check provides a quick fix that you can use to immediately correct issues found during a check run, select the *Quick Fix* button.
5. If you encounter an error you can’t resolve, contact Technical Support by creating a ticket.

Next Steps

To verify that you've solved the underlying issue, select the checkbox for the corresponding checks and choose *Run Checks*. You can also wait until the next automatic run to see if the issue has been solved.

> ⓘ Note
>
> If the check you selected requires one or more prechecks (checks that need to be run successfully first), the prechecks are run first even if you haven't selected them.

Related Information

Running Checks [page 197]

Using the Quick Fix Feature [page 201]

11.1 Benefits of the Check Tool

The SAP SuccessFactors check tool helps you identify and resolve issues when your system doesn't work as you expect.

If your SAP SuccessFactors applications are behaving in unexpected ways, it is likely that it has a configuration or data conflict: you have some data that is inconsistent or a configuration error. The check tool quickly identifies these types of problems so that you can avoid support tickets. You might still need to create a support ticket if the problem is severe, but even in severe cases, the check tool can save you time because it can export the results of the check and your configuration for Technical Support. The support engineer, therefore, can identify the issue more quickly.

When you open the check tool, you see:

- A list of issues in your configuration or data and the severity of each issue.
- A solution or recommendation to address the issue.

11.2 Running Checks

Trigger the execution of individual checks to find potential issues in the system, or to check if an issue has been solved in the meantime.

Prerequisites

- You've enabled the Metadata Framework.
- You have the following *Administrator Permissions* > *Check Tool* permissions:
  - *Access Check Tool*
  - *Allow Configuration Export*
  - *Allow Check Tool Quick Fix*

Context

In addition to the job runs performed automatically by the system, you can also run individual checks. For example:

- You want to check whether the issue has been solved.
- You want to run a check as a prerequisite or post-step of a task. For example, you made changes to the system (such as updating data models or picklists), and you want to verify that your changes didn't cause any new issues. For more information, refer to the application-specific documentation.

- Validation checks need to be run manually as they require input parameters.

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens displaying the results of the first tab *System Health*.
2. Depending on the check type of the check you want to perform, select the corresponding tab.

   A list of checks is displayed in the results table according to the predefined selection criteria.
3. **Optional:** If the check you're searching for is not listed in the results table, adjust the selection criteria and choose *Go*.

   You get a list of checks that fulfill the selection criteria you've entered.
4. Select the corresponding checks, and choose *Run Checks* from the top right of the results table.

   > Note
   >
   > Please note that, for checks on the *Validation* tab, you can only select one row at a time. Execution of multiple checks at once is not possible.
   >
   > Also, for validation checks you need to enter the required input parameters when running a check.

   > Note
   >
   > If the check you selected requires one or more prechecks (checks that need to be run successfully first), the prechecks are run first even if you haven't selected them.

   The *Results* column displays any issues found.

Next Steps

Investigate and solve the underlying issue.

11.3 Check Types

Overview of the different check types and their purpose.

The check type groups those checks that have a common purpose. On the *Check Tool* page, each tab represents a check type.

Overview of Check Types

Check Type	Description	Automatic Job Runs
System Health	Checks that run without parameters and check configuration and data issues that need to be fixed. The predefined selection criteria displays only those that have returned errors or warnings after the last run. We recommend you solve these in a timely manner. To display all checks, select all result types in the **Result Type** search filter and select *Go*.	• Automatic initial run at the beginning of a new release • Periodic runs (usually monthly)
Migration	Checks that perform an automatic migration of features. When you open the page, only pending migrations are displayed. To display also the competed migrations, turn on the *Show completed migrations also* search filter and select *Go*.	• Automatic initial run at the beginning of a new release • Periodic runs (usually monthly)
Validation	Checks which need one or more parameters for execution, for example: • A specific template • A specific user • A specific time frame Validation checks can be triggered by single selection and choosing the *Run* button. A popup appears with input fields for the parameters. Execution of multiple checks at once is not possible.	Only triggered through user

11.4 Check Results

After you run checks in the check tool, it returns the results of the checks so that you can resolve the issues found.

The results of a check are displayed in the *Result* column. If you run the checks multiple times to see how you're resolving issues, you can select a previous result from the *History* dropdown list.

> ⓘ Note
>
> To display the *History* dropdown list, select a check. On the details screen that opens on the right side of the page, expand the header. The *History* dropdown list is directly below the check title.

Possible Results of Check Tool

Result	Action
No issues found	If the tool can't find issues, you see a green check mark in the *Result* column.
Issues found	If the tool finds issues, it reports the number of issues and a yellow warning icon or a red alarm icon. • The yellow icon indicates a low severity issue. The system proposes a solution. • The red icon indicates a high severity issue. You must take action, which could include creating a support ticket.
Pending migrations	If the tool finds pending migrations that need to be completed by the user, you can see a yellow warning icon or a red alarm icon in the *Status* column on the *Migration* tab.
Completed	If the tool finds no issues with migration, or the migration has already been completed, you see a green check mark in the *Status* column on the *Migration* tab.

ⓘ Note

- Select the *Export Results* button to download the check results. Ensure you run the check before exporting the check results. If not you can view only the first 100 check results.
- The downloaded check result table can display a maximum number of 10,000 rows.

Related Information

Creating Technical Support Tickets from the Check Tool [page 200]

11.5 Creating Technical Support Tickets from the Check Tool

When the check tool reports a serious issue that you can't solve, you might need to contact Technical Support. You can create a support ticket from within the check tool.

Prerequisites

You've run the check tool. You can find the check tool by going to *Admin Center* > *Check Tool*. You create the ticket from the details page of the tool.

Procedure

1. Select the check you can't solve.

   The detail view opens to the right side of the screen with more information on the check and on how to solve the issue.
2. On the *Result* tab, scroll down to the results table to look for the errors you want to report on.

   You usually contact Technical Support for high severity issues not low severity issues.
3. On the *Check Information* tab, under *Need Assistance?*, copy the component ID.

   For example, LOD-SF-EC is the component ID for Employee Central.
4. Create a customer case in the relevant category.
5. When you create the ticket, paste the component ID into the ticket.

11.6 Using the Quick Fix Feature

The check tool includes a quick fix feature that you can use to immediately correct issues found during a check run.

Prerequisites

The checks you want to solve with a quick fix have run and provide a check result with error or warning.

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The **Check Tool** page opens.
2. Select the check you want to fix.

   The details screen opens on the right side of the page with more information about the check. If the check includes a quick fix, the *Quick Fix* button is displayed on the *Result* tab, under *Proposed Solution*.
3. Choose *Quick Fix* to start fixing the issue.

   A third screen opens to the right side, with step 1, called *Select Correction*, that shows one or more corrections for the issue.
4. Select the correction you want to carry out and choose *Step 2* to proceed to *Final Approval*.

   In the *Final Approval* step, you can opt to change your mind and not carry out the fix.
5. If you want to proceed, choose *Step 3*.

   The system confirms that the fix is now running.

6. Choose *Close* to complete the procedure.

   After a short time, the system runs the check again to verify that the fix has run correctly.

11.7 Exports

11.7.1 Exporting Configuration Information

Export the configuration information from your system and attach it to the Support ticket created from the check tool. This information can help Support identify the issue of a check you can't solve yourself.

Prerequisites

You have the *Administrator Permissions* > *Check Tool* > *Allow Configuration Export* permission.

Context

> **Restriction**
>
> Export of configuration information is supported only in the following applications:
>
> - Payroll Information
> - Position Management
> - Time Off
> - Time Sheet

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens with a list of all applications for which you can use the check tool..
2. Select the corresponding application.

   If the application has the export configuration feature enabled, you can see an information message at the bottom of the page with a link.
3. Choose the *Export Configuration* link in the information message.

Results

The system downloads a file with the configuration information for the application you've selected.

Next Steps

Attach the downloaded file to the Support ticket you created from the check tool.

11.7.2 Exporting Check Results

After you run checks in the check tool, you can export the results.

Context

- Ensure you run the check before exporting the check results. If you don't do this, you can view only the first 100 check results.
- The downloaded check result table can display a maximum number of 10,000 rows.

Procedure

On the *Result* tab, select the *Export Results* button to download the check results.

11.7.3 Exporting a List of All Checks

Get an overview of all checks available in the system by exporting a CSV file.

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens.
2. In the top-right corner, select *Export all checks*.

   A CSV file with all checks available in the system is downloaded, including check descriptions and application area.

ⓘ Note

The list includes also checks that you can't access from the user interface if you don't have the corresponding applications set up, or if you lack the required permissions.

12 Change History

Learn about changes to the documentation for Managing User Information in recent releases.

1H 2025

Type of Change	Description	More Info
Added	Added information on fields that can be updated through *Import Accounts*.	Importing Login Accounts [page 41]
Changed	Removed information about the import method *Import Employee Data* > *Background Import*. This method is deprecated and you can use the tool *Import Extended User Information* instead.	Choosing a Tool for User Management [page 30]
Added	Added information on the `emails` and `phoneNumbers` attributes of the SCIM `users` APIs.	Mapping Between SCIM Users and ODATA User [page 183]
Added	Added information that Alumni user type is now supported in *Filter Permission Groups to be Returned by Workforce SCIM APIs*.	Filtering Permission Groups to Be Returned by Workforce SCIM APIs [page 188]
Added	Added information that we don't recommend Employee Central-enabled customers to update the field `location` through import, as this is an HRIS field. The HRIS sync will overwrite the value manually added before.	Field Requirements for the User Data File [page 104]
Added	Added a note for User ID.	Different IDs in SAP SuccessFactors HCM suite [page 6]
Added	Added information on enforcing user account upgrade.	Enforcing User Account Upgrade [page 43]
Added	Added information about `company`, a new field that can be updated through data import.	Field Requirements for the User Data File [page 104]

2H 2024

Type of Change	Description	More Info
January 17, 2025		
Changed	Incorporated information about basic user data import permission setting into Importing Basic User Data topic.	Importing Basic User Data [page 132]
October 11, 2024		
Added	Added information about importing and exporting login accounts	Exporting Accounts Template [page 38] Exporting Login Accounts [page 39] Importing Login Accounts [page 41]
Changed	SCIM `Groups` API now also supports replacing members of static permission groups.	Overview of SAP SuccessFactors Workforce System for Cross-Domain Identity Management API [page 174]
Changed	For instances that have no duplicate usernames in the case-insensitive mode, the *Enable Case-Insensitive Usernames* option is enabled automatically.	Enabling Case-Insensitive Usernames [page 52]
Added	Added information that you can also see account type information in *Manage Login Accounts*.	Viewing Login Accounts [page 37]
Changed	General Display Name becomes an admin opt-out feature. Related configuration information is thus updated.	Configuring General Display Name [page 76]
Added	The latest and the legacy People Profile display names in the format of General Display Name in different UIs.	Important Notes About General Display Name Adoption [page 78]
Changed	Pronouns are displayed by default on the latest People Profile and still require additional configuration to be shown on the legacy People Profile.	Enabling Pronouns [page 95]

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