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| Test Script  SAP SuccessFactors HCM Core  April 2018  English | Customer |
| Manage Leave Of Absence  ID: 10B (United States) |

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Document History

| **Revision** | **Change Date** | **Description** |
| --- | --- | --- |
|  |  |  |

# Purpose

## Purpose of the Document

This document provides a detailed procedure for testing the scope item Manage Leave Of Absence after solution deployment, reflecting the predefined scope of the solution. Each process step is covered in its own section, providing the system interactions (i.e. test steps) in a table view. Steps that are not in scope of the process but are needed for testing are marked accordingly (see column Test Step). Customer-project-specific steps must be added.

Note for the customer project team: Instructions for the customer project team are mentioned between brackets and should be removed before hand -over to project testers. The appendix is included for internal reference, in particular to support A2O, and should also be deleted before hand-over to the customer, unless deemed helpful to explain the larger context.

## Purpose of Manage Leave Of Absence

 Caution

The scope item described in this test script is relevant only if your company has configured the Time Off for Leave of Absence Only module in the SAP SuccessFactors Employee Central instance using the SAP Best Practices.

In case your company has implemented in the SAP SuccessFactors Employee Central instance the Time Off content from Upgrade Center, you can skip this document and refer to scope item Request and ManageTime Off (FJ7) instead.

Situations can occur in which the employee may be absent for a longer period from work. Reasons for interrupting a work relationship is, for example, parental leave. The employee requests a leave of absence; after approval by the line manager and the HR business partner of the employee, an event with appropriate event reason is triggered, which results in the appropriate setting of the employee’s status to mark that the employee is away from work for a longer period. An employee, who is on a long-term leave of absence, must return to work after a certain period of time. In this case, the appropriate data changes must be entered into the system. An event with appropriate event reason is triggered to mark that the employee is back to work.

In case Position Management has been implemented in the SAP SuccessFactors Employee Central instance, you can decide whether that employee should have the right to return to his or her current position when the leave of absence is over. For this, the Right to Return feature needs to be set. Right to Return is also visualized on the Position Org Chart. In this document, we consider that if Position Management has been implemented, the Right to Return feature is also used. In addition, we consider that the employee is assigned to a regular and not mass position.

 Note

If an employee does not return to work after a long-term leave of absence, you have to perform the Terminate action for this employee. In case the Core content has been deployed with the SAP Best Practices, you can refer to test script Take Action: Termination (FJ3) for details on executing the Terminate action.

# Prerequisites

This section summarizes all prerequisites to conducting the test in terms of systems, users, master data, organizational data, and other test data and business conditions.

## Configuration

Please ensure to follow the correct installation sequence of building blocks as specified in the Prerequisite Matrix.

## System Access

The test should be conducted with the following system and users:

|  | Type of Data | Details |
| --- | --- | --- |
| System | SAP SuccessFactors Employee Central | <Provide details on how to access system, e.g. system client or URL> |
| Standard User | Employee | <Provide Standard User Id and Password for test, if applicable> |
| Standard User | Line Manager | <Provide Standard User Id and Password for test, if applicable> |
| Standard User | HR Administrator | <Provide Standard User Id and Password for test, if applicable> |
| Standard User | Employee’s HR Business Partner | <Provide Standard User Id and Password for test, if applicable> |

 Note

In the following, we will use the following abbreviations for the systems:

* SAP SuccessFactors Employee Central will be referenced as Employee Central.
* As the customer might also consider integration to SAP SuccessFactors Employee Central Payroll, this system will be referenced as Employee Central Payroll.

## Roles

For non-standard users, the following roles must be assigned in Employee Central to the system user(s) testing this scenario.

| Business Role | Permission Role | Process Step | Sample Data |
| --- | --- | --- | --- |
| Employee | SAP BestPractices Employee (Self Service for EC) | Refer to chapter Overview Table. | Test user: <userid>; Password: <password>  For testing purpose, you can proxy as the role using SAP BestPractices Super Admin role. |
| Line Manager   Note  The line manager is maintained in field Supervisor in the Job Information block of the employee. The Job Information block is located in the Employment Information section > Job Information subsection. | SAP BestPractices Manager (EC) | Refer to chapter Overview Table. | Test user: <userid>; Password: <password>  For testing purpose, you can proxy as the role using SAP BestPractices Super Admin role. |
| HR Administrator | For testing purposes, only:  SAP BestPractices Super Admin | Refer to chapter Overview Table. | Test user: <userid>; Password: <password> |
| (Employee’s) HR Business Partner   Note  This is the person having Relationship Type HR Manager to the employee; visible in the Job Relationships block of the employee. The Job Relationships block is located in the Employment Information section > Job Relationships subsection. | SAP BestPractices Employee (Self Service for EC) | Refer to chapter Overview Table. | Test user: <userid>; Password: <password>  For testing purpose, you can proxy as the role using SAP BestPractices Super Admin role. |

## Master Data, Organizational Data, and Other Data

The organizational structure and master data of your company have been created in your system during implementation. The organizational structure reflects the structure of your company and includes the company, cost center and location in the system. The master data reflects employee specific data.

## Business Conditions

Before this scope item can be tested, the following business conditions must be met.

|  | Business Condition | Comment |
| --- | --- | --- |
| 1 | One administrator user with the complete access to all employee views and fields must exist. | Permission group SAP BestPractices Super Admin can be used as reference. |
| 2 | Employees must have been hired (or rehired) and already exist in the system. | In case the Core content has been deployed with the SAP Best Practices, you can refer to the appropriate process step of scope item Add New Employee / Rehire (FJ0). |

## Preliminary Steps

### Maintaining Employee Time Profile

Use

In order that the process steps can be executed as described, the Time Profile field must be filled in the employee’s master data record. This field is located in the Time Off Information block of the Job Information subsection.

Below, the procedure for maintaining the Time Profile field is given.

Procedure

1. Log on to Employee Central as HR Administrator.
2. In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee whose data you want to maintain. Choose in the list of employees matching the search criteria the appropriate employee. You are directed to the Employee Files page in which the profile of the selected employee is displayed.
3. Go to the Employment Information section and there scroll to the Job Information subsection. Select the Clock (History) icon next to the Job Information block.
4. In the Change History part of the upcoming Job Information Changes dialog box, select the appropriate New Hire record and choose the Edit button.
5. In the Edit History of Job Information on <hire date> dialog box, make sure that in the When would you like your changes to take effect? field the employee’s hiring date is displayed.
6. Scroll to the Time Off Information block and make the following entry:

| Field Name | User Action and Values |
| --- | --- |
| Time Profile | select LOA Profile (US) (US\_LOA\_PROFILE) from drop-down |

1. When done, choose the Save button. The data is saved and is visible in the employee’s Job Information subsection of the Employment Information section.

# Overview Table

The scope item Manage Leave Of Absence consists of several process steps provided in the table below.

 Note

Some of the process steps can be executed using the Mobile App. These process steps are mentioned accordingly, for details see the Transaction Code column of below table. The procedure of executing these process steps using Mobile App is sketched the Appendix of this document.

| Process Step | UI Type | Business Condition | Business Role | Transaction | Expected Results |
| --- | --- | --- | --- | --- | --- |
| Request Leave of Absence | Employee Central UI | The employee is going on parental leave. | Employee | Company Instance URL | A leave of absence has been requested. The request has been sent to the line manager for approval. |
| Process Leave of Absence Request | Employee Central UI |  | Line Manager | Company Instance URL or Mobile App | The leave of absence request has been approved by the line manager and sent to the HR business partner for further processing. |
| Process Approved Leave of Absence Request | Employee Central UI | The employee’s line manager has approved the leave of absence request. | HR Business Partner (of the employee) | Company Instance URL or Mobile App | The HR business partner has approved the leave of absence request. |
| Update Employee Job Information | Back-ground |  |  |  | Upon the HR business partner has approved the request, an event with appropriate event reason is triggered, which updates the employee’s job information. |
| Update Employee Position Information (Optional) | Back-ground | Relevant only if Position Management has been implemented and Right to Return feature is activated in your Employee Central instance. |  |  | Upon the HR business partner has approved the request, the employee’s position is updated automatically with information related to the right of the employee to return on this position. |
| View Employee Position Details (Optional) | Employee Central UI | Relevant only if Position Management has been implemented and Right to Return feature is activated in your Employee Central instance. | HR Administrator | Company Instance URL | The position details of the employee who went on a leave of absence have been viewed. |
| View Employee Job Information Details | Employee Central UI |  | HR Administrator | Company Instance URL | The job information details of the employee who went on a leave of absence have been viewed. |
| Enter Return to Work from Leave of Absence Data | Employee Central UI |  | HR Administrator | Company Instance URL | The return to work from a leave of absence of an employee has been entered into the system. |
| Update Employee Job Information | Back-ground |  |  |  | Upon submitting the date, the employee returned to work, an event with appropriate event reason is triggered, which updates the employee’s job information. |
| Update Employee Position Information (Optional) | Back-ground | Relevant only if Position Management has been implemented and Right to Return feature is activated in your Employee Central instance. |  |  | Upon submitting the date, the employee returned to work, the employee is automatically assigned again to the position he or she occupied before the leave of absence. |
| View Employee Position Details (Optional) | Employee Central UI | Relevant only if Position Management has been implemented and Right to Return feature is activated in your Employee Central instance. | HR Administrator | Company Instance URL | The position details of the employee who returned from leave of absence have been viewed. |
| View Employee Job Information Details | Employee Central UI |  | HR Administrator | Company Instance URL | The job information details of the employee who returned from leave of absence have been viewed. |

# Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

The test should take around 20 minutes.

Prerequisites

The leave of absence request requires the approval of the line manager and the HR business partner of the employee. Therefore, during hiring of the employee the field Supervisor (the employee’s line manager) and the Relationship Type HR Manager must have been maintained.

 Recommendation

In case it has been missed to maintain the Supervisor (meaning, value No Manager, has been entered), or the maintained information is incorrect, it can be adapted as briefly described below:

* Log on to Employee Central as HR Administrator.
* Select from the Home drop-down My Employee Files. Select the drop-down next to your name to enter the employee’s name in the search box, and choose in the list of employees matching the search criteria the appropriate employee.
* Go to the Employment Information section and there scroll to the Job Information subsection. Select the Clock (History) icon next to the Job Information block.
* In the Change History part of the upcoming dialog box, select the appropriate New Hire record and choose the Edit button.
* In the Edit History of Job Information on <hire date> dialog box, make sure that in the When would you like your changes to take effect? field the employee’s hiring date is displayed. Make the appropriate correction for the supervisor name. When done, choose the Save button. The data is saved and is visible in the employee’s Job Information subsection of the Employment Information section.

In case it has been missed to maintain the Relationship Type HR Manager, it can be added as briefly described below:

* Log on to Employee Central as HR Administrator.
* Select from the Home drop-down My Employee Files. Select the drop-down next to your name to enter the employee’s name in the search box, and choose in the list of employees matching the search criteria the appropriate employee.
* Go to the Employment Information section, and there scroll to the Job Relationships subsection.
* Select the Pencil (Edit) icon next to the Job Relationships block.
* In the upcoming Job Relationships dialog box, enter in the When would you like your changes to take effect? field the date the change is to become valid (most likely the hiring date of the employee). The Job Relationships block shows up in the dialog box. Select the ⊕ Add link and make the following entries:

For field Relationship Type, select HR Manager from the drop-down, and for field Name, select the appropriate employee from the drop-down.

* To add additional relationship types, which should become effective the same data, select the ⊕ Add link and make entries as appropriate.
* Choose the Save button. The data is saved and is visible in the employee’s Job Relationships subsection of the Employment Information section. Note, that also the Clock (History) icon becomes now visible. You can use it, for example, to make corrections on an existing Job Relationships record, if needed.

 Note

As mentioned in chapter 1.2 Purpose of Manage Leave Of Absence, we consider that if Position Management has been implemented in the instance, the Right to Return feature is also used. In addition, we consider that the employee is assigned to a regular and not mass position.

 Recommendation

In case Position Management has been deployed with the SAP Best Practices, you can refer for details on creating positions to test script of scope item Manage Positions (FK1). In case the Core content has been deployed with the SAP Best Practices, you can refer for details on hiring/rehiring employees on these positions to test script of scope item Add New Employee / Rehire (FJ0). In case employees already exist in the Employee Central instance at the point in time when Position Management is deployed with the SAP Best Practices, these employees can be assigned to newly created positions as appropriate. For more details on this, refer to chapter Assigning Employee to Position in the Appendix of test script Manage Positions (FK1).

## Requesting Leave of Absence

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Employee | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The Employee requests a leave of absence, for example parental leave. This request initiated by the employee generates a two-step workflow; the request must be approved by both the employee’s line manager and HR business partner.

 Note

For more details on the workflow, refer to the Leave of Absence workbook for **US**.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Employee. |  |  | The Home page is displayed. |  |
| 2 | Go to **Time Off** Screen | Option 1: On the Home page select from the Home drop-down MyEmployeeFile. On the My Employee File screen, go to the Time Off section. Select the Go to Time Off link located in the Upcoming Time Off block of the Time Off subsection.  Option 2: On the Home page select from the Home drop-down MyEmployeeFile. On the My Employee File screen, select the Take Action button located in the top right corner of the screen and from the value list, which appears, select Manage Leave of Absence.  Option 3: if configured, you can go on your Home page to the My Info section and click on the TimeOff tile. |  |  | The TimeOff screen is displayed. It is structured into several horizontal parts:   * In the upper part, the detailed calendar is displayed. * In the lower part, the View Team Absence Calendar link and the My Requests section are displayed. |  |
| 3 | Select Time Type | Select from the upper part of the screen the appropriate pushbutton of the time type for which you want to request leave of absence. | Select from Other drop-down value Parental |  | The fields to be filled by you appear on the screen below the detailed calendar. |  |
| 4 | Enter Parental Leave Request Details | Make the following entries regarding your leave of absence request: | TimeType: value selected in test step # 3 is defaulted; leave as is |  |  |  |
| StartDate*:* defaults to today’s date; select appropriate value from calendar help | Alternatively, you can use the paintbrush mouse over to mark the complete period for which you request leave of absence. | The TeamAbsencessection located at the bottom of the screen is expanded, informing you who is also absent during your planned absence. In case no other team member is absent during your leave of absence, an appropriate information message is displayed in the TeamAbsencessection. |  |
| Expected ReturnDate: defaults to tomorrow’s date; select appropriate value from calendar help |  |
| Comment: add explanation to request, if necessary |  |  |  |
| 5 | Submit Request | Choose the Submit button. |  |  | A system message is generated about successful saving of your request and awaiting approval from your line manager. |  |

Result

The employee requested for a leave of absence. The request has been sent to the line manager for approval. The period of absence planned by the employee is shaded in the calendar. The My Requests section, located at the bottom of the TimeOff screen, is expanded: it contains details to the employee’s planned absence. The employee’s request is in status Pending.

In case email is configured and the email address of the employee’s line manager is maintained in the system, the line manager receives an email about his or her needed approval for the employee’s leave of absence request.

 Note

To change or cancel the leave of absence request, choose either Edit or Cancel Request link locatedbelow the appropriate request in the My Requests section, and make the appropriate entries.

 Note

The HR Administrator can request leave of absence for the employee on behalf of the employee, too. In this case, the leave of absence is posted directly and no approval from the employee’s line manager and employee’s HR business partner is needed. The procedure in this case is as follows:

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR Administrator. |  | The Home page is displayed. |  |
| 2 | Search Employee | In theSearch for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee on behalf of whom you want to request a leave of absence. |  | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | Select the appropriate employee from the result list. |  | You are directed to the Employee Files page in which the profile of the employee is displayed. |  |
| 4 | Go to **Time Information** Screen of Employee | Option 1: On the Employee Files screen, go to the Time Off section. Select the Administer Time link located in the Upcoming Time Off block of the Time Off subsection.  Option 2: On the Employee Files screen, select the Take Action button located in the top right corner of the screen and from the value list, which appears, select Manage Leave of Absence. |  | The TimeInformation for <employee name> screen is displayed showing per default the Time Record section. |  |
| 5 | Request Leave of Absence on Behalf of Employee | Select the + New Absence button located in the right corner above the Time Records (#) table. |  | The New Absence dialog box is displayed, containing the fields to be filled. |  |
| 6 | Enter Request Details | Make the following entries regarding the leave of absence request: | Time Type: select Parental from drop-down |  |  |
| StartDate: defaults to today’s date; select appropriate value from calendar help |  |  |
| Expected ReturnDate: defaults to tomorrow’s date; select appropriate value from calendar help |  |  |
| Requesting: is defaulted automatically based on the dates entered |  |  |
| Comment: add explanation to request, if necessary |  |  |
| 7 | Submit Request | Choose the Submit button. |  | A system message is generated about successful posting of the leave of absence. The request is automatically approved. |  |

Result

The HR administrator requested leave of absence on behalf of the employee. The leave of absence request has been automatically approved. The HR administrator can view it in the Time Records (#) table on the Time Information for <employee name> screen, or alternatively, on the employee’s Employee Files screen in the Upcoming Time Off block located in the Time Off subsection of the Time Off section. For the employee, the leave of absence request is visible in the My Requests section of the Time Off screen, or alternatively, on the Employee Files screen, in the Upcoming Time Off block located in the Time Off subsection of the Time Off section.

 Note

To change or cancel the leave of absence request, choose in theTime Records (#) table on the Time information for <employee name> screen the Edit link locatednext to the Status of the request. In the upcoming Edit Absence dialog box, proceed as follows:

* + To change the request, make the appropriate adaptions and choose the Submit button.
  + To cancel the request, choose the Cancel Request button.

## Processing Leave of Absence Request

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Line Manager | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The Line Manager processes the leave of absence request of type Parental sent by his or her subordinated employee.

Prerequisites

The leave of absence request must have been maintained by the employee and sent for approval to his or her line manager.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Line Manager. | The Homepage is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type.  Starting with this list, you have different options:   * Approve directly a single request. * Select a single leave of absence request, review its details and process it. * Filter for the relevant leave of absence request and approve it.   Each of these options is detailed in a separate Procedure table below. Continue the process execution with one of these options. |  |

Option 1: Approving Directly Single Leave of Absence Request

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 3 | Approve Directly Single Leave of Absence Request | In the Approve Requests dialog box, review the high-level details of the Time Off Requests for <employee name> you need to approve. These high-level details refer to the time type (for example, Parental) and the duration of this absence.  If everything is fine, choose the Approvebutton next to the leave of absence request. | The system generates a message about the successful approval of the workflow and the request disappeared from the Approve Requests dialog box. |  |
| 4 | Return to Home page | If appropriate, approve directly other single requests, otherwise choose X to close the Approve Requests dialog box and return to the Home page. | Note  Once there is no request left for you to approve, the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |

Option 2: Detailed Processing of Single Leave of Absence Request

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 3 | Select Leave of Absence Request | In the Approve Requests dialog box, click on the Time Off Requests for <employee name> link, which has time type, for example, Parental.   Note  In case there are several leave of absence requests submitted by this employee, pay attention to the displayed high level details (more precisely the time type and absence period) to choose the correct request. |  | The EmployeeFiles > Workflow Details screen is displayed containing details to the employee’s leave of absence request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Time Off Requests section contains the detailed request, and the section immediately below contains the absences of other team members during the same period. * In the Comment section, you can post your remarks to the employee’s request. * On the right part of the screen a short profile of the requesting employee is given, as well as administrative details to the request initiation. |  |
| 4 | Review Leave of Absence Request | Review the detailed request. If needed, you can enter a note to this leave of absence request in the Comment section. |  |  |  |
| 5 | Approve Leave of Absence Request | If everything is fine, choose the Approvebutton to approve the leave of absence request. | You may also pass the request to someone else to approve. For this choose the Delegate button, select in the upcoming DelegateRequest dialog box from the drop-down the person to whom you want to delegate the request, and choose the Send button. | The system generates a message about the successful approval of the workflow.   Note  Once there is no request left for you to approve, the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |

Option 3: Filtering for Leave of Absence Request to be Approved

In case you have several requests in the Approve Requests tile, you might want to filter for the appropriate leave of absence request submitted by your direct report.

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 3 | Go to **My Workflow Requests** Screen | Select the Go to Workflow Requests button located at the bottom right of the Approve Requests dialog box. |  | The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. |  |
| 4 | Filter for Leave of Absence Requests | To filter for the leave of absence request, select the Filter  icon. |  | Several fields are displayed on top of the My Workflow Requests (#) screen, which can be used as filter criteria. |  |
| To filter for the leave of absence request (for example, of type Parental) submitted by your direct report, select for field Request Type value Change Generic Object Actions,for field Object value Time Off Requests, and in field Initiated By the name of the employee who has submitted the request. Then choose the Go button. |  | The leave of absence requests submitted by that employee for you to approve are listed.  For each leave of absence request in the list, the name of the requesting employee, the start date, end date, and time type (absence) are displayed. |  |
| 5 | Select Leave of Absence Request to be approved | Flag the checkbox on the very left of the Time Off Requests for <employee name> link you want to approve, namely the one of time type Parental. | Alternatively, instead of executing test steps # 5 and # 6, separately, you can combine them by selecting the Approve button next to the appropriate Time Off Requests for <employee name> link. | The number of selected requests is displayed on the top right of the list of requests. |  |
| 6 | Approve Leave of Absence Request | Select the Approve (#) button on the top right of the list of requests. | The selected leave of absence request has been approved. The number of filtered requests you still need to approve has decreased accordingly.   Note  If appropriate, you can remove the filter and process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |

Result

The line manager has processed the leave of absence request.

The workflow is sent for further processing to the employee’s HR Business Partner (described in process step Processing Approved Leave of Absence Request below). The status of the request is still Pending.

In case email is configured and the email address of the employee’s HR Business Partner is maintained in the system, he or she receives an automatic email about the needed approval for the employee’s leave of absence request.

## Processing Approved Leave of Absence Request

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | HR Business Partner (of employee) | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

In case of a leave of absence of type Parental, the request needs to be approved by the HR Business Partner of the employee, too.

Prerequisites

The leave of absence request has been approved by the employee’s line manager.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR Business Partner. | The Homepage is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type.  Starting with this list, you have different options:   * Approve directly a single request. * Select a single leave of absence request, review its details, and process it. * Filter for the relevant leave of absence request and approve it.   Each of these options is detailed in a separate Procedure table below. Continue the process execution with one of these options. |  |

Option 1: Approving Directly Single Leave of Absence Request

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 3 | Approve Directly Single Leave of Absence Request | In the Approve Requests dialog box, review the high-level details of the Time Off Requests for <employee name> you need to approve. These high-level details refer to the time type (for example, Parental) and the duration of this absence.  If everything is fine, choose the Approvebutton next to the leave of absence request. | The system generates a message about the successful approval of the workflow and the request disappeared from the Approve Requests dialog box. |  |
| 4 | Return to Home page | If appropriate, approve directly other single requests, otherwise choose X to close the Approve Requests dialog box and return to the Home page. | Note  Once there is no request left for you to approve, the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |

Option 2: Detailed Processing of Single Leave of Absence Request

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 3 | Select Leave of Absence Request | In the Approve Requests dialog box, click on the Time Off Requests for <employee name> link, which has time type, for example, Parental.   Note  In case there are several leave of absence requests submitted by this employee, pay attention to the displayed high level details (more precisely the time type and absence period) to choose the correct request. |  | The EmployeeFiles > Workflow Details screen is displayed containing details to the employee’s leave of absence request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The TimeOffRequests section contains the detailed request, and the section immediately below contains the absences of other team members during the same period. * In the Comment section, you can post your remarks to the employee’s request. * On the right part of the screen a short profile of the requesting employee is given, as well as details to the activities so far in the workflow (request initiation, approval by line manager). |  |
| 4 | Review Leave of Absence Request | Review the detailed request. If needed, you can enter a note to this leave of absence request in the Comment section. |  |  |  |
| 5 | Approve Leave of Absence Request | If everything is fine, choose the Approvebutton to approve the leave of absence request. | You may also pass the request to someone else to approve. For this choose the Delegate button, select in the upcoming DelegateRequest dialog box from the drop-down the person to whom you want to delegate the request, and choose the Send button. | The system generates a message about the successful approval of the workflow.   Note  Once there is no request left for you to approve, the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |

Option 3: Filtering for Leave of Absence Request to be Approved

In case you have several requests in the Approve Requests tile, you might want to filter for the appropriate leave of absence request submitted by the employee.

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 3 | Go to **My Workflow Requests** Screen | Select the Go to Workflow Requests button located at the bottom right of the Approve Requests dialog box. |  | The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. |  |
| 4 | Filter for Leave of Absence Requests | To filter for the leave of absence request, select the Filter  icon. |  | Several fields are displayed on top of the My Workflow Requests (#) screen, which can be used as filter criteria. |  |
| To filter for the leave of absence request (for example, of type Parental) submitted by the employee, select for field Request Type value Change Generic Object Actions,for field Object value Time Off Requests, and in field Initiated By the name of the employee who has submitted the request. Then choose the Go button. |  | The leave of absence requests submitted by that employee for you to approve are listed.  For each leave of absence request in the list, the name of the requesting employee, the start date, end date, and time type (absence) are displayed. |  |
| 5 | Select Leave of Absence Request to be approved | Flag the checkbox on the very left of the Time Off Requests for <employee name> link you want to approve, namely the one of time type Parental. | Alternatively, instead of executing test steps # 5 and # 6, separately, you can combine them by selecting the Approve button next to the appropriate Time Off Requests for <employee name> link. | The number of selected requests is displayed on the top right of the list of requests. |  |
| 6 | Approve Leave of Absence Request | Select the Approve (#) button on the top right of the list of requests. | The selected leave of absence request has been approved. The number of filtered requests you still need to approve has decreased accordingly.   Note  If appropriate, you can remove the filter and process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |

Result

The HR Business Partner of the employee has processed the leave of absence request.

The status of the request has changed accordingly to Approved.

In case email is configured and the email address of the employee is maintained in the system, the employee receives an automatic email about the approval of the leave of absence request.

 Note

In this case, the employee can access the link provided in the email to view details of the request, especially of the approval status.

### Updating Employee Job Information

Purpose

Upon the workflow approval performed by the employee’s HR Business Partner, an event is triggered with appropriate event reason, which updates the job information of the employee automatically.

This is an automated step, and no manual execution is required.

### Updating Employee Position Information (if Position Management implemented)

Purpose

**Only if Position Management has been implemented and Right to Return** **feature is activated:** Upon the workflow approval performed by the employee’s HR Business Partner, the employee’s position is updated automatically with information related to the right of the employee to return on this position.

This is an automated step, and no manual execution is required.

## Viewing Employee Position Details (if Position Management implemented)

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | HR Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

 Caution

This process step is relevant only if Position Management has been implemented and Right to Return feature is activated!  
In case you do not use Position Management, you may ignore this chapter!

The HR Administrator views if the position, to which the employee is assigned, has been updated as expected after the employee started his or her leave of absence. More precisely, he or she checks if information has been added, which reflects the right to return of the employee to this position after the leave of absence ends.

Procedure

| Test Step # | Test Step Name | Instruction | Additional information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR Administrator. |  | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. |  | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. |  |
| 3 | Search Position | Go to the Position Org Chart tab.  In the Search By field, select value Positions from the drop-down. In the Search field, select from the drop-down the position the employee used to be assigned to before his or her leave.  Click on the calendar icon  located in the top right corner of the screen and select from calendar help the first day the employee is on leave (or any other date within the leave period). | In case you select for the Search By field value People from the drop-down, enter in the Search field the name of the employee, and select from the calendar icon  a date within the leave period, you should obtain a system message stating that no position is found to which the employee is assigned, | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. |  |
| 4 | View Position High-Level Data | Verify that the number of incumbents (visible in <current #> / <target #> FTE) has decreased accordingly, and the At least one right to return exists for this position icon  is visible. |  |  |  |
| Choose the position and in the upcoming side panel next to it choose Right To Return Details. |  | The menu is expanded and details to the employee who has the right to return to this position are shown. |  |
| 5 | Go to Detailed Position screen | On the side panel, next to the position choose the Show Position  icon located below <position title (code)> and next to as of <selected date>. |  | The Position: <position title (code)> window shows up containing the position details. |  |
| 6 | View Position Details | Check that the value in the Start Date field coincides with the start date maintained for the request in process step Requesting Leave of Absence.  Check that the Right To Return section of the Position: <position title (code)> window contains following data:  User: <name of employee who is on leave of absence>  Reason: Leave of Absence  Click the Details link; in the upcoming Details dialog box view the time type, it should be Parental(US\_PARENT). Choose the Done button. |  |  |  |
| 7 | Close Window | When done, choose X (Cancel). |  |  |  |

## Viewing Employee Job Information Details

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | HR Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The HR Administrator views if the job information of the employee has been updated as expected after the employee started his or her leave of absence.

Procedure

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR Administrator. |  | The Home page is displayed. |  |
| 2 | Search Employee | In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee whose job information data you want to view. |  | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | Select the appropriate employee from the result list. |  | You are directed to the Employee Files page in which the profile of the employee is displayed. |  |
| 4 | Go to **Employment Information** Section | On the Employee Files screen, go to the Employment Information section. |  | The Employment Information section is displayed. |  |
| 5 | View **Job Information** Block | Verify in the Job Information block of the Job Information subsection that the Employee Status field has value Paid Leave. | In case the leave of absence starts on a future date, you are advertised in the Job Information block that future change in job information is pending. Select this link. In the Change History part of the upcoming Job Information Changes dialog box, select the appropriate future record, and verify that the Employee Status is Paid Leave. |  |  |
| 6 | View Position Information (Optional) | Only if Position Management has been implemented and **Right to Return** feature is activated:verify in the Position Information block of the Organizational Information subsection that no data for position information is available. |  |  |  |
| 7 | Go to Job Information History | Select the Clock (History) icon next to the Job Information block. |  | The Job Information Changes dialog box is displayed: on the left hand-side, the historical records of the job information are listed; on the right hand-side, the current valid record is displayed. |  |
| 8 | View Job Information Details | In the Job Information Changes dialog box verify that following values are displayed in the Employee Status and Event blocks, respectively:  Employee Status: Paid Leave  Event: Leave of Absence  Event Reason: Maternity/ Paternity - INTL (PLAMAT)  Expected Return Date: <date as maintained in the leave of absence request> | In case the long-term absence starts on a future date, select in the Change History part of the Job Information Changes dialog box the appropriate future record, and verify the fields mentioned in the Instruction column. |  |  |

 Caution

**Only in case integration with Employee Central Payroll is in place**, the employee absence data is replicated to Employee Central Payroll. In order to check the correctness of the replicated data, proceed as described in test script of scope item Integration with SAP SuccessFactors Employee Central Payroll (15O).

## Entering Return to Work from Leave of Absence Data

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | HR Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

After the employee has returned from his or her leave of absence (for example parental leave), the HR Administrator maintains appropriate data in the system.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR Administrator. |  | The Home page is displayed. |  |
| 2 | Search Employee | In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee who has returned from the parental leave. |  | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | Select the appropriate employee from the result list. |  | You are directed to the Employee Files page in which the profile of the employee is displayed. |  |
| 4 | Go to **Time Information** Screen of Employee | Option 1: On the Employee Files screen, go to the Time Off section. Select the Administer Time link located in the Upcoming Time Off block of the Time Off subsection.  Option 2: On the Employee Files screen, select the Take Action button located in the top right corner of the screen and from the value list, which appears, select Manage Leave of Absence. |  | The TimeInformation for <employee name> screen is displayed, showing per default the Time Record section. |  |
| 5 | Edit Request | In the Time Records (#) table, choose the Edit link located next to the Status of the parental leave request you want to update. |  | The Edit Absence dialog box is displayed. |  |
| 6 | Enter Actual Return Date | In the Edit Absence dialog box enter the date the employee has actually returned to work from his or her parental leave: | Actual ReturnDate: select appropriate date from calendar help |  |  |
| Requesting: is defaulted automatically based on the start date and the actual return date |  |  |
| Comment: add an appropriate explanation |  |  |
| 7 | Submit Updated Request | Choose the Submit button. |  | A system message is generated about successful saving of the data. The details of leave of absence of type Parental have been updated automatically in the Time Records (#) table of the employee. |  |

 Note

The employee can view administrative details on his or her leave of absence by logging on to the Employee Central instance and navigating to Home → My Employee File → Time Off section → Upcoming Time Off block → Go to Time Off link. Alternatively, the employee can choose on the My Employee File screen the Take Action button and select Manage Leave of Absence to arrive at the same page.

### Updating Employee Job Information

Purpose

Once the HR Administrator has submitted the updated record containing the return date of the employee to work, an event is triggered with appropriate event reason, which updates the job information of the employee automatically.

This is an automated step, and no manual execution is required.

### Updating Employee Position Information (if Position Management implemented)

Purpose

**Only if Position Management has been implemented and Right to Return** **feature is activated:** Once the HR Administrator has submitted the updated record containing the return date of the employee to work, the employee is automatically assigned again to the position he or she occupied before the leave of absence.

This is an automated step, and no manual execution is required.

## Viewing Employee Position Details (if Position Management implemented)

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | HR Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

 Caution

This process step is relevant only if Position Management has been implemented and Right to Return feature is activated!  
In case you do not use Position Management, you may ignore this chapter!

The HR Administrator views if the employee has been assigned back to his or her old position after he or she returned to work from his or her leave of absence. More precisely, the HR Administrator checks if the position data has been updated as expected after the employee returned to work from his or her leave of absence.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR Administrator. | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. |  |
| 3 | Search Position | Go to the Position Org Chart tab. To search for the position the employee is re-assigned to after his or her leave of absence, proceed using one of the options below:  Option 1:  In the Search By field, select value Positions from the drop-down.  In the Search field, select the position from the drop-down.  Option 2:  In the Search By field, select value People from the drop-down.  In the Search field, enter name or name parts of the employee and select the appropriate employee from the list of suggested persons.  For both options, click on the calendar icon  located in the top right corner of the screen and select from calendar help the first day the employee is back to work (or any other date after the return date). | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. |  |
| 4 | View Position High-Level Data | Verify that the number of incumbents (visible in <current #> / <target #> FTE) has increased accordingly, and the At least one right to return exists for this position icon is not visible anymore.  Note  Note that in the side panel next to the position, the Right To Return Details menu does not show up anymore. |  |  |
| 5 | Go to Detailed Position screen | Choose the position and in the upcoming side panel next to it choose the Show Position  icon located below <position title (code)> and next to as of <selected date>. | The Position: <position title (code)> window shows up containing the position details. |  |
| 6 | View Position Details | Check that the Start Date field value coincides with the actual return date maintained in process step Entering Return to Work from Leave of Absence Data.  Check that the Right To Return section of the Position: <position title (code)> window does not contain any data. |  |  |
| 7 | Close Window | When done, choose X (Cancel). |  |  |

## Viewing Employee Job Information Details

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | HR Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The HR Administrator views if the job information of the employee has been updated as expected after the employee has returned from his or her leave of absence.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR Administrator. | The Home page is displayed. |  |
| 2 | Search Employee | In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee whose job information data you want to view. | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | Select the appropriate employee from the result list. | You are directed to the Employee Files page in which the profile of the employee is displayed. |  |
| 4 | Go to **Employment Information** Section | On the Employee Files screen, go to the Employment Information section. | The Employment Information section is displayed. |  |
| 5 | View **Job Information** Block | Verify in the Job Information block of the Job Information subsection that the Employee Status field has value Active. |  |  |
| 6 | View Position Information (Optional) | Only if Position Management has been implemented and **Right to Return** feature is activated: In the Position Information block of the Organizational Information subsection verify that the employee is assigned again to the same position as before the leave of absence. Verify that the Position Entry Date coincides with the actual return date maintained in process step Entering Return to Work from Leave of Absence Data. |  |  |
| 7 | Go to Job Information History | Select the Clock (History) icon next to the Job Information block. | The Job Information Changes dialog box is displayed: on the left hand-side, the historical records of the job information are listed; on the right hand-side, the current valid record is displayed. |  |
| 8 | View Job Information Details | In the Job Information Changes dialog box verify that following values are displayed in the Employee Status and Event blocks, respectively:  Employee Status: Active  Event: Return to Work  Event Reason: Return From Leave (RETLEAVE) |  |  |

 Caution

**Only in case integration with Employee Central Payroll is in place**, the employee absence data is replicated to Employee Central Payroll. In order to check the correctness of the replicated data, proceed as described in the test script of scope item Integration with SAP SuccessFactors Employee Central Payroll (15O).

# Appendix

## Executing Process Steps using Mobile App

As mentioned in chapter Overview Table, several process steps can be executed via mobile device. For this, the SAP SuccessFactors Mobile application must have been activated on the mobile devices of the persons executing these steps.

 Recommendation

For details on activating the SAP SuccessFactors Mobile application, refer to the Read Me document.

In the following, the procedure for executing the process steps using mobile devices are given.

### Processing Requests

Purpose

If the SAP SuccessFactors Mobile application has been activated on the mobile devices of the approvers of requests, they receive the requests also on their mobile devices. Instead of approving/rejecting the requests on the company instance website, they can do so on their mobile devices.

For this scope item, following users can activate the SAP SuccessFactors Mobile application:

* Line Managers,
* HR Business Partner of the employees.

Procedure

1. Open the SAP SuccessFactors mobile app and log on by tapping the corresponding user name.
2. Tap on To-Do and under Approve Requests select the appropriate request you need to process (for example, leave of absence request).
3. On the Details screen, review the request, and if satisfied, tap Approve.

 Note

You may also pass the request to someone else to approve. For this tap Delegate.

## Process Chains

The process to be tested in this test script is part of a chain of integrated processes.

In the assumption that the Employee Central related content in your instance has been deployed with the SAP Best Practices, you can test following business processes.

### Preceding Processes

You may first have completed the following processes and conditions before you start with the test steps:

| Process | Business Condition |
| --- | --- |
| In case the Core content has been deployed: Add New Employee / Rehire (FJ0) | Employees must have been hired (or rehired) and already exist in the system. |

### Succeeding Processes

After completing the activities in this test script, you can continue testing the following business processes:

| Process | Business Condition |
| --- | --- |
| In case the Core content has been deployed: Data Change Employee File (FJ5) (Optional) | In case changes to the employee's master data, for example in the address, are needed, carry out the appropriate process step(s) described in test script of scope item Data Change Employee File (FJ5). |
| Integration with SAP SuccessFactors Employee Central Payroll (15O) (Optional) | In case integration with SAP SuccessFactors Employee Central Payroll is in place, the employee data is transferred from SAP SuccessFactors Employee Central to SAP SuccessFactors Employee Central Payroll and can be checked there for correctness. |

Typographic Conventions

| **Type Style** | **Description** |
| --- | --- |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.  Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

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