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| Test Script  SAP SuccessFactors HCM Core  April 2018  English | Customer |
| Manage Company Structure  ID: 2OY |

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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 Company Structure 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 Company Structure

This document describes how company structures can be managed within the SAP SuccessFactors Employee Central system.

The Company Structure Overview module enables companies to visualize the entire structure of the company in chart format. One or several views of the company structure can be provided for different target users. Furthermore, customers can define the UI per defined company structure.

For visualization of the structure of the company, use of MDF object types (for example, Business Unit, Division, Department, Cost Center) and their relationships is made.

Having the company structure definition in place, users can directly start transactions from it, for example creating new organization objects, editing existing ones, or starting an action for an employee. Triggers for maintaining the company structure may include reorganization, mergers or acquisitions, expansion, renaming of organization objects as part of restructuring measures, and so on.

# 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 | HR Administrator | <Provide Standard User Id and Password for test, if applicable> |

 Note

In the following, the SAP SuccessFactors Employee Central system will be referenced as Employee Central.

## 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 |
| --- | --- | --- | --- |
| HR Administrator | For testing purposes, only: use the appropriate Super Admin group to which the role of the SAP BestPractices Company Structure Super Admin has been granted | Refer to chapter Overview Table. | Test user: <userid>; Password: <password> |

## 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 | To view a company structure, organization object instances must exist in your instance. |  |
| 2 | Optionally, in case Position Management has been implemented in your Employee Central instance: To view position(s) assigned to organization objects, positions must have been created and already exist in the system. | In case the Position Management content has been deployed with the SAP Best Practices, you can refer to the appropriate steps in test script of scope item Manage Positions (FK1). |
| 3 | Optionally, to view employee(s) assigned to organization objects, 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). |

# Overview Table

The scope item Manage Company Structure consists of several process steps provided in the table below.

| Process Step | UI Type | Business Condition | Business Role | Transaction | Expected Results |
| --- | --- | --- | --- | --- | --- |
| View Company Structure | Employee Central UI | A company structure has been defined during configuration. | HR Administrator | Company Instance URL | The company structure as defined during configuration has been viewed. |
| View Employee Assignment in Company Structure | Employee Central UI | Employees have been hired and exist in the system. | HR Administrator | Company Instance URL | Individual employees have been searched for and assignment details have been viewed. |
| Create Organization Object | Employee Central UI |  | HR Administrator | Company Instance URL | Organization objects, like for example business unit, division, and department, have been created, |
| Update Organization Object | Employee Central UI | A request for updating organization objects exists. | HR Administrator | Company Instance URL | The attributes of organization objects, like for example business unit, division, and department, have been updated, |
| Deactivate Organization Object | Employee Central UI | The organization object has become obsolete and is not relevant anymore for reporting purposes. All employees have been moved to other organization objects. | HR Administrator | Company Instance URL | The organization object has been deactivated. |

# Test Procedures

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

The test should take around 1 hour.

Prerequisites

In order that the process steps can be executed as described, following prerequisites must be fulfilled:

* It is assumed that at least one company structure definition has been created during configuration and is available in the instance.
* It is assumed that concrete instances of organization objects, like business unit, division, and department, already exist in your Employee Central instance, for example those obtained by deploying the Core content with the SAP Best Practices.

 Caution

For each process step, additional prerequisites might be needed. These are mentioned accordingly at the appropriate process step.

## Viewing Company Structure

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 details of a specific company structure. For this, he or she uses the Company Structure Overview.

The company structure overview is a graphical representation of organization objects, and how they relate to each other, whether they are higher-level, lower-level, or peer organization objects.

Prerequisites

The field Count People has been maintained for all types of organization objects during configuration.

In case Position Management has been implemented in your Employee Central instance, following additional prerequisite must be fulfilled: the field Count Positions has been maintained for all types of organization objects during configuration.

 Recommendation

For details on these prerequisites, refer to the Company Structure Overview workbook.

Procedure

 Note

When describing the procedure, we consider as basis the company structure given as example in the Company Structure Overview workbook. This means, that details to business units, divisions and departments can be viewed using the Company Structure Overview. In our description, we give one procedure fits all for checking details of all these organization object types. You will need to execute it for each organization object type in the following order: first view details to business units, then to divisions, and last to departments.

In case you have adapted the company structure definition during configuration or have created an own one, some activities listed might be not relevant for you, whereas other possible activities, depending on the MDF entity types added to your company structure definition, are not considered in our description.

| Test Step # | Test Step Name | Instruction | 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 | Select Company Structure | Go to the Company Structure Overview tab.  In the Company Structure field, select from drop-down the <company structure definition name> as defined during configuration. |  |  |
| 4 | Search Organization Object | In the Search field, select from the drop-down the organization object type you want to view, for example one of the following: Business Unit, Division, or Department.  In the second search field, select an instance of that organization object type you want to view.  Either leave today’s date (which is the default), or click on the calendar icon  located in the top right corner of the screen and select another date from the calendar help.  cid:image002.png@01D32D82.D9654F10 Note  In case of divisions and departments, if these are already visible in the company structure overview below the higher-level organization object selected in this test step (division in case of business unit, and department in case of division), you can proceed directly with the expected result of this test step. | The company hierarchy as of the selected date is displayed, starting from the selected organization object, and containing one level below, if existing.   Note  In case of business units, you will see the selected business unit and its subordinated division(s) displayed.  In case of divisions, you will see the selected division and its subordinated department(s) displayed.  In case of departments, if applicable, you will see the selected department and its subordinated department(s) displayed.  The fields visible on the organization object card depend on how the UI has been configured.   Recommendation  For details on the config UI, refer to the Company Structure Overview workbook.   * For a business unit in general, following details could be shown on the organization object card: <code>, <name>, <effective start date>, <status>. * For a division in general, following details could be shown on the organization object card: <code>, <name>, <effective start date>, <status>. * For a department in general, following details could be shown on the organization object card: <code>, <name>, <effective start date>, <status>, <cost center>, <parent department>.   In addition, some icons are displayed on the organization object card:   * Icon  showing the number of employees assigned to the organization object    Note  This is shown only if during configuration, the field Count People has been maintained for the organization object.   * Icon showing the number of positions assigned to the organization object    Note  This is shown only if Position Management has been implemented in your instance and if during configuration, the field Count Positions has been maintained for the organization object.   * If applicable, icon showing that multiple parents exist    Note  This may be shown only if the selected organization object type is a department.  For the lower-level organization objects of the selected organization object, the number of subordinated organization objects, if any, is displayed on the organization object card. |  |
| 5 | View Subordinated Organization Objects of Lower-Level Organization Object (Optional) | In case a lower-level organization object of the selected organization object has itself subordinated organization objects, you can view these by selecting the number <#> on the bottom of the organization object card. | The organization objects become visible below the higher-level organization object type. |  |
| 6 | View Organization Object Details | To view data of the selected organization object, click in the company structure overview on that organization object. | A side panel containing information about the organization object is displayed. The fields displayed depend on how the UI has been configured.  Based on the examples provided in the Company Structure Overview workbook, following information is visible in the side panel:   * organization object type * name and code of the organization object, as well as the date on which the displayed information is valid * Details menu, expanded by default; the listed fields depend on the selected organization object, for example Code, Name, Effective as of, etc. * Multiple Parents Details menu, if applicable    Note  This may be shown only if the selected organization object type is a department.   * History menu * People menu    Note  This is shown only if during configuration, the field Count People has been maintained for the organization object and at least one employee is assigned to the organization object.   * Positions menu    Note  This is shown only if Position Management has been implemented in your instance and if during configuration, the field Count Positions has been maintained for organization object and at least one position is assigned to the organization object. |  |
| 7 | View Employee(s) assigned to Organization Object (Optional) | Click either on the <#> employees are assigned  icon, or in the side panel of the organization object on People.   Note  The People menu is available in the side panel only if there is at least one employee assigned to the organization object. If no employees are assigned to the organization object, the No employees are assigned  icon is visible and is not selectable. | The People menu is expanded.  The total number of employees and corresponding total amount of FTE assigned to this organization object is displayed.  The employees assigned to this organization object are listed in alphabetical order. |  |
| Using the free text Search field located below <#> employees with <#> FTE are assigned, you can search for individual employees. |  |  |
| Starting with the View more information about this person icon next to the employee’s name, you can view and edit the employee’s profile. |  |  |
| 8 | View Position(s) assigned to Organization Object (Optional)   Caution  Relevant only if Position Management has been implemented in your Employee Central instance! | Click either on the <#> positions are assigned icon, or in the side panel of the organization object on Positions.   Note  The Positions menu is available in the side panel only if there is at least one position assigned to the organization object. If no positions are assigned to the organization object, the No positions are assigned  icon is visible and is not selectable. | The Positions menu is expanded.  The total number of positions and corresponding total amount of FTE assigned to this organization object is displayed.  The positions assigned to this organization object are listed in alphabetical order. |  |
| Using the free text Search field located below <#> positions with <#> FTE are assigned, you can search for individual positions. |  |  |
| Starting with the Show Position  icon next to the position’s name, you can view and edit the position details. |  |  |
| When clicking on the Load in Position Org Chart as of <selected date>  icon next the position’s name, you can load this position as the root object in the Position Org Chart. | An additional page is opened, in which the selected position is displayed as the root object in the Position Org Chart, and one level below, if existing. |  |
| 9 | View Details of Parent Department of selected Department (Optional)   Caution  Relevant only if selected organization object is a department having multiple parents! | Click either on the Has multiple parent entities icon, or in the side panel of the department on Multiple Parents Details.  Note  The Multiple Parents Details menu is available in the side panel only if the selected department has in addition to the superordinate division also one superordinate department. | The Multiple Parents Details menu is expanded and the parent division and parent department are listed. |  |
| Starting with the Show Division  icon or Show Department  icon, respectively, next to the division’s or department’s name, you can view and edit the division’s or department’s details. |  |  |
| When clicking on the Click to reload the chart with this parent as root  icon next to the division’s or department’s name, you can load this division or department as the root object in the Company Structure Overview. | The selected parent is displayed as the root object in the Company Structure Overview, and one level below (for example, Division – Department(s)). |  |
| 10 | View Hierarchy of Department having Multiple Parents   Caution  Relevant only if selected organization object is a department having multiple parents! | To view the hierarchy, in which the department with multiple parents is embedded, select the Up One Level button. | A callout is displayed listing the parent entities to which you can navigate. |  |
| Click on the appropriate link in this callout, for example on the Division: <division name(code)> link. | The company hierarchy is displayed, starting from the selected <division name(code)> and containing one level below. |  |
| Expand the structure, such that the complete structure below the selected <division name(code)> is visible. | The department having multiple parents is visible multiple times in the structure: for example, below the <division name(code)> and below the <parent department name(code)>. |  |
| 11 | Export Company Structure (Optional) | To export the viewed company structure, select the Export  icon in the top-right corner of the screen. You have the option to download it as PDF or as Image/jpg. Select the appropriate option. Then either open the file directly, or save it on your local disk and open it. |  |  |

## Viewing Employee Assignment in Company Structure (Optional)

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 searches for individual employees within the company structure and views their organizational assignment.

Prerequisites

Employees must have been hired (or rehired) and assigned to the organization objects.

Procedure

| Test Step # | Test Step Name | Instruction | 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 | Select Company Structure | Go to the Company Structure Overview tab.  In the Company Structure field, select from drop-down the <company structure definition name> as defined during configuration. |  |  |
| 4 | Search Employee | In the Search field, select By people from the drop-down.  In the second search field, enter the name (or name parts) of the employee. | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 5 | View Employee Assignment | In the result list hover the mouse over the name of the employee of interest. | A side panel is displayed, containing the organization objects to which the employee is assigned, like business unit, division, or department.  In case the employee is head of an organization object, this is also visible in the side panel.  Note  In case Global Assignment Management has been implemented in your instance: if the employee you are searching for is on global assignment, then the currently active assignment (most likely the one in the host company) is given.  In case Concurrent Employment Management has been implemented in your instance: if the employee you are searching for has one or more concurrent employments, only the assignment to the main employment is given. |  |
| If required, you can select an assignment to reload the company structure with that assignment as the root object. | The selected organization object is displayed as the root object in the Company Structure Overview, and one level below (for example, Division – Department(s)). |  |

## Creating Organization Object

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 creates organization object instances within a company structure to keep up-to-date with business requirements of the company. For this purpose, he or she makes use of the Company Structure Overview feature. The organization objects considered explicitly in this document are business unit, division, and department.

The HR Administrator has two options for creating the organization objects:

* Create organization objects from scratch from the Company Structure Overview main page;
* Create organization objects as child entities of existing organization object instances.

For organization objects types, which are root organization objects of the company structure and for which no parent entities exist, only the first option can be used. In our case, such an organization object type is the business unit.

For organization objects types, which are child entities of other organization objects, both option can be used. In our case, such organization object types are division and department.

In the following, the detailed creation of each of these three organization object types is described.

Procedure

| Test Step # | Test Step Name | Instruction | 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 | Select Company Structure | Go to the Company Structure Overview tab.  In the Company Structure field, select from the drop-down the <company structure definition name> as defined during configuration. | The Add entity  icon becomes selectable.  Continue with one or several of the uses cases described below, preferably in the mentioned order. |  |

Use case 1: creating a business unit

The business unit is the root organization object of the company structure as given in the Company Structure Overview workbook, At the same time, it is considered being the highest-level organization object of the present SAP Best Practices. Therefore, it cannot be created directly from another organization object in a concrete company structure, but needs to be created separately using the Add entity  icon.

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 4 | Select Organization Object to be Created | Select the Add entity  icon. In the upcoming Add entity dialog box, check the Business Unit radio button and choose the Add button. |  | The Business Unit dialog box is displayed. |  |
| 5 | Enter Business Unit Details | In the Business Unit dialog box fill in the details of the new business unit you want to create: | Effective as of: select validity start date of new business unit from calendar help  Note  Defaults to today’s date. |  |  |
| Code: enter as appropriate |  |
| Name: enter as appropriate |  |
| Description: enter as appropriate |  |
| Status: Active is defaulted; leave as is |  |
| Head of Unit: select from drop-down if an appropriate employee exists |  |
| 6 | Save Data | Choose the Save button. |  | The Business Unit: <name (code)> dialog box is displayed, containing the details of the business unit you have just created. |  |
| 7 | Go Back to Company Structure Overview | Choose X (Cancel) to close the dialog box. |  | You return to the Company Structure Overview screen. The business unit is displayed in graphical mode in the chart. |  |

Use case 2: creating a division

To create a division, you have two options: either create it from the Company Structure Overview main page using the Add entity  icon (test step # 4), or as child entity of an existing business unit (test step # 5).

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 4 | Option 1: Select Organization Object to be Created | Select the Add entity  icon. In the upcoming Add entity dialog box, check the Division radio button and choose the Add button. |  | The Division dialog box is displayed.  Continue with test step # 6. |  |
| 5 | Option 2: Select Parent Organization Object and Add Child Organization Object | In the Search field, next to the Company Structure field, select from the drop-down the organization object type that should be the parent of the division, namely Business Unit.  In the second search field, select the concrete business unit, to which the new division should belong to. |  | The company hierarchy as of today is displayed, starting from the selected organization object (business unit) and containing one level below, if existing. |  |
| Click on the selected business unit. In the upcoming side panel, next to the business unit choose the Show Menu  icon, and in the upcoming small callout choose Add Child Entity. |  | The Division dialog box is displayed.  Continue with test step # 6. |  |
| 6 | Enter Division Details | In the Division dialog box fill in the details of the new division you want to create: | Effective as of: select validity start date of new division from calendar help  Note  Defaults to today’s date. |  |  |
| Code: enter as appropriate |  |
| Name: enter as appropriate |  |
| Description: enter as appropriate |  |
| Status: Active is defaulted; leave as is |  |
| Head of Division: select from drop-down if an appropriate employee exists |  |
| Parent Division: select from drop-down if appropriate |  |
| Business Unit: select from drop-down the business unit, to which the division should belong  Note  In case you have used Option 2, the value is defaulted with the concrete business unit you have selected in test step # 5. In this case, adapt only in case you have realized that the wrong business unit has been selected; else leave the value unchanged. |  |
| 7 | Save Data | Choose the Save button. |  | The Division: <name (code)> dialog box is displayed, containing the details of the division you have just created. |  |
| 8 | Go Back to Company Structure Overview | Choose X (Cancel) to close the dialog box. |  | You return to the Company Structure Overview screen. The division is displayed in graphical mode in the chart. |  |
| 9 | Verify Hierarchy | To view the hierarchy, in which the new division is embedded, select the Up One Level button. |  | The superordinate business unit and possibly the peer divisions are displayed in the chart. |  |

Use case 3: creating a department

To create a department, you have two options: either create it from the Company Structure Overview main page using the Add entity  icon (test step # 4), or as child entity of an existing division (test step # 5).

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 4 | Option 1: Select Organization Object to be Created | Select the Add entity  icon. In the upcoming Add entity dialog box, check the Department radio button and choose the Add button. |  | The Department dialog box is displayed.  Continue with test step # 6. |  |
| 5 | Option 2: Select Parent Organization Object and Add Child Entity | In the Search field, next to the Company Structure field, select from the drop-down the organization object type that should be the parent of the department, namely Division.  In the second search field, select the concrete division, to which the new department should belong to. |  | The company hierarchy as of today is displayed, starting from the selected organization object (division) and containing one level below, if existing. |  |
| Click on the selected division. In the upcoming side panel, next to the division choose the Show Menu  icon, and in the upcoming small callout choose Add Child Entity. |  | The Department dialog box is displayed.  Continue with test step # 6. |  |
| 6 | Enter Department Details | In the Department dialog box fill in the details of the new department you want to create: | Effective as of: select validity start date of new department from calendar help  Note  Defaults to today’s date. |  |  |
| Code: enter as appropriate |  |
| Name: enter as appropriate |  |
| Description: enter as appropriate |  |
| Status: Active is defaulted; leave as is |  |
| Head of Department: select from drop-down if an appropriate employee exists |  |
| Parent Department: select from drop-down if appropriate   Recommendation  See also the Note below this table. |  |
| Cost Center: select from drop-down if appropriate |  |
| In the Apprentice Details part of the dialog box, enter data as appropriate.  Note  Relevant only in case Apprentice Management has been implemented in the instance. In case the Apprentice Management content has been deployed with the SAP Best Practices, you can refer to test script of scope item Manage Apprentices (1ZC) for more details. |  |  |  |
| In the Division part of the dialog box, depending on the option used as starting point of the department creation, proceed as follows: | In case you have used Option 1, (test step # 4), select from drop-down the division, to which the department should belong. |  |  |
| In case you have used Option 2, the division is defaulted with the concrete division you have selected in test step # 5. In this case, adapt only in case you have realized that the wrong division has been selected; else leave the value unchanged. |  |  |
| 7 | Save Data | Choose the Save button. |  | The Department: <name (code)> dialog box is displayed, containing the details of the department you have just created. |  |
| 8 | Go Back to Company Structure Overview | Choose X (Cancel) to close the dialog box. |  | You return to the Company Structure Overview screen. The department is displayed in graphical mode in the chart. |  |
| 9 | Verify Hierarchy | To view the hierarchy, in which the new department is embedded, select the Up One Level button. |  | The superordinate division and possibly the same level departments are displayed in the chart. |  |

 Note

You can create lower level departments of a department, too. If you create the lower-level departmentfrom the Company Structure Overview main page using the Add entity  icon, you need to select both the parent department and the division. If you create the lower-level departmentas child entity from a concrete department, then the parent department is defaulted and read-only, and only the division needs to be selected.

## Updating Organization Object

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

Attributes of an organization object need to be always up-to-date with business requirements. When situations occur in which this is not the case anymore, the HR Administrator needs to adapt these attributes.

High-level, the procedure is same for business units, divisions, and departments. Therefore, it is described in a generic manner. Where appropriate, the differences between updating the different organization object types are highlighted.

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 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 Organization Object | Go to the Company Structure Overview tab.  In the Company Structure field, select the <company structure definition name> as defined during configuration from the drop-down.  In the Search field, select from the drop-down the organization object type.  In the second search field, select the instance of that organization object type you want to update. Either leave today’s date (which is the default), or click on the calendar icon  located in the top right corner of the screen and select an appropriate date. |  | The company hierarchy as of the selected date is displayed, starting from the selected organization object and containing one level below, if existing. |  |
| 5 | View Organization Object Details | Click on the organization object. In the upcoming side panel, next to the organization object, choose the Show <Organization Object>  icon located below <organization object name (code)> and next to as of <selected date>. |  | The <Organization Object Type>: <organization object name (code)> dialog box is displayed, containing the organization object details. |  |
| 6 | Go to Edit Mode | In the <Organization Object Type>: <organization object name (code)> dialog box select the Edit link. | Alternatively, you can select in the <Organization Object Type>: <organization object name (code)> dialog box, the Manage link and on the upcoming Manage Data screen select the Insert New Record link on the top right of the <Organization Object Type>: <organization object name (code)> portlet. | The Insert new changes for <Organization Object Type>: <organization object name (code)> dialog box is displayed. |  |
| 7 | Add Effective Date of Organization Object Change | In the Insert new changes for <Organization Object Type>: <organization object name (code)> dialog box, enter the date the change becomes effective and choose the Proceed button. | Enter Effective Date for this change: select date from calendar help, for example today’s date (defaulted value) or future date | The <Organization Object Type>: <organization object name (code)> dialog box is displayed, containing the fields in edit mode. |  |
| 8 | Change Organization Object Details | Make changes as appropriate. | Adapt values as per the requirements, for example Name, Description, Head of <Organization Object>.  Depending on the organization object type that is updated, you might also adapt the Parent <Organization Object> or <higher-level organization object type>. |  |  |
| 9 | Save Data | Choose the Save button to save the record. |  | The organization object details have been updated. The changes are visible in the <Organization Object Type>: <organization object name (code)> dialog box. The old values are strikethrough. |  |
| 10 | Close Window | On the <Organization Object Type>: <organization object name (code)> dialog box, choose X (Cancel). |  | You are directed back to the Company Structure Overview screen, containing the organization object you just have updated. |  |
| 11 | Verify New Hierarchy of Organization Object (Optional) | In case changes to a parent or higher-level organization object type have also been performed, select the Up One Level button. |  | The updated organization object is displayed in the appropriate hierarchy in the chart. |  |

## Deactivating Organization Object

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

When an organization object becomes obsolete, for example due to a corporate downsizing, or due to changes in business requirements, this organization object needs to be deactivated in the system.

In Employee Central, delimitation of an organization object is achieved by setting its status to Inactive starting a particular date.

The procedure is same for business units, divisions, and departments. Therefore, it is described in a generic manner.

Prerequisites

No employees are assigned to the organization object starting one day after the deactivation date. Before deactivating an organization object, make sure that all employees have been assigned to other organization object(s) or have been terminated.

If the deactivation occurs on a date in the near future, no employees should be assigned to this organization object starting as of today, be it through hiring/rehiring or an appropriate take action process.

The organization object has no active lower-level organization objects.

The organization object is to be excluded from reporting activities.

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 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 Organization Object | Go to the Company Structure Overview tab.  In the Company Structure field, select the <company structure definition name> as defined during configuration from the drop-down.  In the Search field, select from the drop-down the organization object type.  In the second search field, select the instance of that organization object type you want to deactivate. Either leave today’s date (which is the default), or click on the calendar icon  located in the top right corner of the screen and select the date on which the organization object should be deactivated. |  | The company hierarchy as of the selected date is displayed, starting from the selected organization object. |  |
| 4 | Check Fulfillment of Deactivation Conditions | On the organization object card displayed, check that following conditions are fulfilled:   * The selected organization object has no lower-level entities the day it should be deactivated! * No employees are assigned to the organization object, meaning the No employees are assigned  icon is displayed. * No positions are assigned to the organization object, meaning the No positions are assigned  icon is displayed. |  |  |  |
| 5 | View Organization Object Details | Click on the organization object. In the upcoming side panel, next to the organization object, choose the Show <Organization Object>  icon located below <organization object name (code)> and next to as of <selected date>. |  | The <Organization Object Type>: <organization object name (code)> dialog box is displayed, containing the organization object details. |  |
| 6 | Go to Edit Mode | In the <Organization Object Type>: <organization object name (code)> dialog box select the Edit link. | Alternatively, you can select in the <Organization Object Type>: <organization object name (code)>, the Manage link and on the upcoming Manage Data screen select the Insert New Record link on the top right of the <Organization Object Type>: <organization object name (code)> portlet. | The Insert new changes for <Organization Object Type>: <organization object name (code)> dialog box is displayed. |  |
| 7 | Add Organization Object Deactivation Date | In the Insert new changes for <Organization Object Type>: <organization object name (code)> dialog box, enter the date the deactivation becomes effective and choose the Proceed button. | Enter Effective Date for this change: select from calendar help the first day on which the organization object is inactive | The <Organization Object Type>: <organization object name (code)> dialog box is displayed, containing the fields in edit mode. |  |
| 8 | Deactivate Organization Object | Enter deactivation-relevant details. | Status: select InActive from drop-down |  |  |
| 9 | Save Data | Choose the Save button to save the record. |  | The organization object has been deactivated (become inactive) starting the date entered for the new record. The changes are visible in the <Organization Object Type>: <organization object name (code)> dialog box. The old values are strikethrough. |  |
| 10 | Close Window | On the <Organization Object Type>: <organization object name (code)> dialog box, choose X (Cancel). |  | You are directed back to the Company Structure Overview screen. |  |
| 11 | Search Deactivated Organization Object | Search for the deactivated organization object as described in test step # 3 for a date after the date chosen in test step # 7. |  | The organization object is no longer available in the result list starting the date it has been set to inactive. |  |

# Appendix

## 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 Position Management content has been deployed: Manage Positions (FK1) (Optional) | To view positions assigned to organization objects, these must have been created with appropriate fields filled in. |
| In case the Core content has been deployed: Add New Employee / Rehire (FJ0) (Optional) | Employees must have been hired (or rehired) and already exist in the system. |

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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| --- |
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