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| Test Script  SAP SuccessFactors HCM Core  April 2018  English | Customer |
| Take Action: Job Change/Transfer/Pay Rate Change  ID: FJ1 |

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Document History

| **Revision** | **Change Date** | **Description** |
| --- | --- | --- |
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# Purpose

## Purpose of the Document

This document provides a detailed procedure for testing the scope item Take Action: Job Change/Transfer/Pay Rate Change 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 Take Action: Job Change/Transfer/Pay Rate Change

 Note

The document is, unless otherwise specified, valid for all countries in scope of this SAP Best Practices, with country-specific details also being described.  
In the following, instead of spelling out the country names, we will use the two-letter code for the countries, as follows:

* AE – United Arab Emirates
* AU – Australia
* CN – China
* DE – Germany
* FR – France
* GB – United Kingdom
* SA – Kingdom of Saudi Arabia
* US – United States

This document describes the use of actions for changing the job and/or compensation information of an employee. These actions may refer to job change, transfer, and pay rate change. Dependent on the actions executed, the employee may experience an update of the job information and/or compensation information.

In the SAP SuccessFactors Employee Central system, the button Actions is used to execute different personnel actions to an employee. These actions may result in updates of the job information, like job change or transfer, updates in the pay of the employee, like updates to recurring pay components or one-time payments, or distribution of the costs incurred by an employee to different cost centers in addition to the own master cost center.

An HR administrator with the adequate permissions will be able to execute these actions and enter appropriate data into the system. Depending on the configuration, there may be an approval workflow that is triggered.

In case Position Management has already been implemented from Upgrade Center in the SAP SuccessFactors Employee Central instance when executing actions, additional actions can be executed. Two of these are described in this document. A change in the job information to an employee who is incumbent of a position results in updates of that position. Depending if the position is a regular or shared position, the system behaves differently. In addition, the case of transfer of an employee from his/her current position to a position in the area of responsibility of another line manager is also described.

# Prerequisites

This section summarizes all prerequisites needed to conduct the test in terms of system, user, 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> |
| Standard User | 2nd Level Manager (Line Manager of the employee’s Line Manager) | <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 roles shown in the table below 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:  SAP BestPractices Super Admin | Refer to chapter Overview Table | Test user: <userid>; Password: <password> |
| 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. |
| 2nd Level Manager | 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. |

For change in pay rate, the approval of a member of the Payroll Group is also required. For this, the workflow group Payroll Group must have been created in SAP SuccessFactors Employee Central. For testing purposes, only, you can use the SAP BestPractices Super Admin role and proxy as a member of this group.

In case Position Management has been implemented in your SAP SuccessFactors Employee Central instance from the Upgrade Center, additional permissions are needed, as follows: The Line Manager must have the permission role SAP BestPractices Position Management Manager (EC) assigned. The HR Administrator can use for testing purposes only the appropriate Super Admin group to which the role of the SAP BestPractices Position Management Super Admin has been granted. The implicit update of an employee’s position induced by a change in job information requires the approval of a member of the HR Administrator group. For this, the dynamic group HR Administrator must have been created in SAP SuccessFactors Employee Central. For testing purposes, only, you can log on as Super Admin and use the Proxy Now option to proxy as a member of this group.

## 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. | Refer to the appropriate process step of scope item Add New Employee / Rehire (FJ0). |
| 3 | The workflow group Payroll Group must have been created in Employee Central. | For the change in pay rate, the approval from a member of the workflow group Payroll Group is needed for the changes to become effective. |
| 4 | In case Position Management has already been implemented in your Employee Central instance when executing actions, the dynamic group HR Administrator must have been created in Employee Central. | For the implicit change of an employee’s position induced by a change in job information, the approval from a member of the HR Administrator dynamic group is needed for the changes to become effective. |

# Overview Table

The scope item Take Action: Job Change/Transfer/Pay Rate Change 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 Code | Expected Results |
| --- | --- | --- | --- | --- | --- |
| Take Action: Job Change | | | | | |
| Request Employee Job Change | - | An employee’s job needs to be changed within the organization. | Line Manager | outside software | The line manager has sent a job change request for a direct report to the HR administrator. |
| Receive Employee Job Change Request | - |  | HR Administrator | outside software | The HR administrator has received the job change request. |
| Enter Job Change Data | Employee Central UI |  | HR Administrator | Company Instance URL | The job change data for an employee has been entered into the system. The data change is pending upon approval from the employee’s 2nd level manager. |
| Approve Job Change Request | Employee Central UI | The generated workflow needs to be approved. | 2nd Level Manager | Company Instance URL or Mobile App | The 2nd level manager of the employee has approved the workflow and the changes are effective based on the effective date in the system. |
| Notify Line Manager and Employee about Job Change Completion | - |  | HR Administrator | outside software | The job change completion notification has been sent to the requesting line manager and the employee. |
| Receive Job Change Completion Notification | - |  | Line Manager/ Employee | outside software | The requesting line manager and the employee have received the job change completion notification. |
| Take Action: Transfer | | | | | |
| Request Employee Transfer | - | An employee is going to be transferred to another organizational unit. | Line Manager | outside software | The line manager has sent a transfer request for a direct report to the HR administrator. |
| Receive Employee Transfer Request | - |  | HR Administrator | outside software | The HR administrator has received the transfer request. |
| Enter Transfer Data | Employee Central UI |  | HR Administrator | Company Instance URL | The transfer data for an employee has been entered into the system. The updates to the employee data record are done immediately. |
| Notify Line Manager and Employee about Transfer Completion | - |  | HR Administrator | outside software | The transfer completion notification has been sent to the requesting line manager and the employee. |
| Receive Transfer Completion Notification | - |  | Line Manager/ Employee | outside software | The requesting line manager and the employee have received the transfer completion notification. |
| Take Action: Pay Rate Change | | | | | |
| Request Employee Pay Rate Change | - | An employee is to receive a change in pay rate. | Line Manager | outside software | The line manager has sent a pay rate change request for a direct report to the HR administrator. |
| Receive Employee Pay Rate Change Request | - |  | HR Administrator | outside software | The HR administrator has received the pay rate change request. |
| Enter Pay Rate Change Data | Employee Central UI |  | HR Administrator | Company Instance URL | The pay rate change data for an employee has been entered into the system. The update is pending upon approval of the workflow. |
| Approve Pay Rate Change Request | Employee Central UI | The generated workflow needs to be approved. | 2nd Level Manager | Company Instance URL or Mobile App | The 2nd level manager of the employee has approved the workflow and the workflow has been sent to the next processor. |
| Process Approved Pay Rate Change Request | Employee Central UI | The generated workflow has been approved by the employee’s 2nd level manager and needs a final approval. | Member of workflow group Payroll Group | Company Instance URL or Mobile App | The member of the workflow group Payroll Group has approved the workflow and the changes for the employee are effective based on the effective date in the system. |
| Notify Line Manager and Employee about Pay Rate Change Completion | - |  | HR Administrator | outside software | The pay rate change completion notification has been sent to the requesting line manager and the employee. |
| Receive Pay Rate Change Completion Notification | - |  | Line Manager/ Employee | outside software | The requesting line manager and the employee have received the pay rate change completion notification. |
| Take Action: Spot Bonus | | | | | |
| Enter Spot Bonus Data | Employee Central UI | An employee is to receive a spot bonus as recognition to his or her outstanding work results. | Line Manager | Company Instance URL | The spot bonus data for an employee has been entered into the system. The updates to the employee data record are done immediately. |
| Notify Employee about Spot Bonus | - |  | Line Manager | outside software | The notification about the spot bonus he or she is going to receive has been sent to the appropriate employee. |
| Receive Spot Bonus Notification | - |  | Employee | outside software | The employee has received the spot bonus notification. |
| Take Action: Manage Recurring Deductions | | | | | |
| Request Employee Recurring Deduction | - | A certain amount should be deducted every payroll period from the employee’s compensation. | Line Manager | outside software | The line manager has sent to the HR administrator a request for recurring deduction(s) for one of his/her direct reports. |
| Receive Employee Recurring Deduction Request | - |  | HR Administrator | outside software | The HR administrator has received the recurring deduction(s) request. |
| Enter Recurring Deduction Data | Employee Central UI |  | HR Administrator | Company Instance URL | The recurring deduction data for an employee has been entered into the system. The updates to the employee data record are done immediately. |
| Notify Line Manager and Employee about Recurring Deduction Completion | - |  | HR Administrator | outside software | The recurring deduction completion notification has been sent to the requesting line manager and the employee. |
| Receive Recurring Deduction Completion Notification | - |  | Line Manager/ Employee | outside software | The requesting line manager and the employee have received the recurring deduction(s) completion notification. |
| Take Action: One Time Deduction | | | | | |
| Request Employee One Time Deduction | - | A certain amount should be deducted once in a certain payroll period from the employee’s compensation. | Line Manager | outside software | The line manager has sent to the HR administrator a request for a one time deduction for one of his/her direct reports. |
| Receive Employee One Time Deduction Request | - |  | HR Administrator | outside software | The HR administrator has received the one time deduction request. |
| Enter One Time Deduction Data | Employee Central UI |  | HR Administrator | Company Instance URL | The one time deduction data for an employee has been entered into the system. The updates to the employee data record are done immediately. |
| Notify Line Manager and Employee about One Time Deduction Completion | - |  | HR Administrator | outside software | The one time deduction completion notification has been sent to the requesting line manager and the employee. |
| Receive One Time Deduction Completion Notification | - |  | Line Manager/ Employee | outside software | The requesting line manager and the employee have received the one time deduction completion notification. |
| Take Action: Manage Alternative Cost Distribution | | | | | |
| Enter Alternative Cost Distribution Data | Employee Central UI | The costs incurred by an employee need to be distributed among several cost centers. | HR Administrator | Company Instance URL | The costs incurred by an employee have been distributed in different portions to different cost centers. |
| Take Action: Implicit Position Update  \* relevant only if Position Management has been implemented in your Employee Central instance | | | | | |
| Request Employee Job Information Change | Employee Central UI | An employee’s position needs to be reclassified within the organization. | Line Manager | Company Instance URL | The line manager has sent a request for changing the job information of a direct report. |
| Receive Employee Job Information Change Request Notification | E-Mail |  | Member of dynamic group HR Administrator | outside software | The members of the HR Administrator dynamic group have received the job information change request. One of the group members picks up the request.  Continue with Option 1 or Option 2. |
| Option 1: Approve Employee Job Information Change Request | Employee Central UI | The data maintained in the request is correct and complete. | Member of dynamic group HR Administrator | Company Instance URL or Mobile App | A member of the HR Administrator dynamic group has approved the job information change request. |
| Option 1 (continued): Send Employee Job Information Change Completion Notification | Back-ground |  |  |  | A notification about the completion of the request to change an employee’s job information has been sent to the requesting line manager. |
| Option 1 (continued): Receive Employee Job Information Change Completion Notification | E-Mail |  | Line Manager | outside software | The requesting line manager has received a notification about the completion of the job information change request. |
| Option 1 (continued): Notify Employee about Job Information Change | Back-ground |  |  |  | A notification about changes in the job information induced by the line manager has been sent to the appropriate employee. |
| Option 1 (continued): Receive Job Information Change Notification | E-Mail |  | Employee | outside software | The employee has received a notification about the changes in his/her job information induced by the line manager. |
| Option 2: Send Back Employee Job Information Change Request for Correction | Employee Central UI | The data maintained in the request is not correct or incomplete. | Member of dynamic group HR Administrator | Company Instance URL or Mobile App | A member of the HR Administrator dynamic group has sent the request back to the line manager, asking for adaptions. |
| Option 2 (continued): Receive Correction Request for Employee Job Information | E-Mail |  | Line Manager | outside software | The line manager has received an e-mail with the request to provide corrections to the request. |
| Option 2 (continued): Adapt Employee Job Information Change Request | Employee Central UI | The request needs to be reworked. | Line Manager | Company Instance URL | The line manager has reworked the request and sent it back to the HR Administrator dynamic group for approval. |
| Update Employee Line Manager (Optional) | Employee Central UI | Relevant only for following countries: AE, AU, CN, FR, GB, SA, US | HR Administrator | Company Instance URL | The HR administrator has updated the employee’s line manager. |
| View Employee Position Details | Employee Central UI |  | Line Manager | Company Instance URL | The line manager has viewed if the position of the employee has been updated as expected upon the change in job information. |
| Take Action: Position Transfer  \* relevant only for following countries: AU, US  \* relevant only if Position Management has been implemented in your Employee Central instance | | | | | |
| Request Employee Position Transfer | - | A position transfer process needs to be executed for an employee from the current position to another position outside the area of responsibility of the current line manager. | Source Line Manager | outside software | The source line manager has sent a position transfer request for a direct report to the HR administrator. |
| Receive Employee Position Transfer Request | - |  | HR Administrator | outside software | The HR administrator has received the position transfer request. |
| [Enter Position Transfer Data](#_Toc433900563) | Employee Central UI |  | HR Administrator | Company Instance URL | The position transfer data for an employee has been entered into the system. The update is pending upon approval of the workflow. |
| Approve Position Transfer Request | Employee Central UI | The generated workflow needs to be approved. | Source Line Manager | Company Instance URL or Mobile App | The source line manager of the employee has approved the workflow and the workflow has been sent to the next processor. |
| Process Approved Position Transfer Request | Employee Central UI | The generated workflow has been approved by the employee’s current line manager and needs a final approval from the future line manager. | Target Line Manager | Company Instance URL or Mobile App | The target line manager has approved the workflow and the changes for the employee are effective based on the effective date in the system. |
| Receive Notification about Position Transfer Final Approval | Back-ground |  | - | - | The HR administrator has received a notification about the final approval of the position transfer request. |
| View Updated Positions | Employee Central UI |  | HR Administrator | Company Instance URL | The HR administrator has viewed the details of the updated positions after the position transfer being finally approved. |
| Notify Source Line Manager about Employee Position Transfer Request Completion | - |  | HR Administrator | outside software | The position transfer request completion notification has been sent to the source line manager. |
| Notify Employee about Position Transfer Completion | - |  | HR Administrator | outside software | The position transfer completion notification has been sent to the employee. |
| Receive Employee Position Transfer Request Completion Notification | - |  | Source Line Manager | outside software | The source line manager has received the position transfer request completion notification. |
| Receive Position Transfer Completion Notification | - |  | Employee | outside software | The employee has received the position transfer completion notification. |

# Testing the Process Steps

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

The test should take around 2 hours.

In chapters 4.1 to 4.3, we consider that Position Management has not been implemented in your Employee Central instance, whereas chapter 4.8 and 4.9 are relevant only if Position Management has been implemented in your Employee Central instance. Chapters 4.4 to 4.7 are generally valid.

 Note

The document is generally valid for all countries in scope of this SAP Best Practices. Country-specific details are also described, be it directly in the Procedure tables or in the separate chapter Country-Specific Field Values and its subchapters towards the end of the document. Hyperlinks to chapter Country-Specific Field Values have been added, where applicable, in the Procedure tables within this chapter. You can always jump back by using the Back  button on the Quick Access Toolbar of the Word document.

 Recommendation

To add the Back button, select the Customize Quick Access Toolbar  drop-down and select More Commands. In the Choose commands from drop-down list, choose Commands Not in the Ribbon. Scroll down in the list and select Back. Select Add, then select OK.

 Recommendation

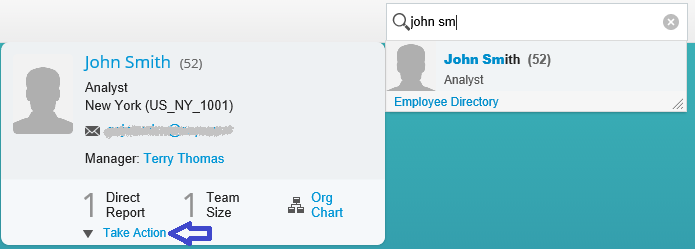
Once you have jumped to the subchapter containing the country-specific information, we recommend enabling View → Navigation Pane → Headings from the top menu to have the navigation pane shown in the left side of the screen. Thus you will be able to navigate to your country.

 Note

For the process steps in which data changes are maintained for the employee in the Employee Central system, the HR Administrator needs to select the employee for whom the action is to be executed. Depending on the configuration, there may be several ways to search and select an employee as well as how to access the Actionspushbutton. In order to not overload the procedure for each process step with details to the searching and selecting of the employee, we describe it in detail below:

**Option 1**: via Search box (see also the screenshot below the table)

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR Administrator.   Note  In some cases, the employee’s line manager starts the process. In these cases, log on as a Line Manager. | The Home page is displayed. |  |
| 2 | Search for 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. | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | In the result list hover the mouse over the name. | The employee’s business card is displayed. |  |
| 4 | Select Take Action Pushbutton | In the employee’s business card, select the Take Action drop-down menu, see blue arrow in picture below. | The Take Action menu is expanded and an appropriate action can be selected. |  |
| 5 | Continue | To continue the process, proceed as described in one of the chapters Take Action: Job Change, Take Action: Transfer, Take Action: Pay Rate Change, Take Action: Spot Bonus, Take Action: Manage Recurring Deduction, Take Action: One Time Deduction or Take Action: Manage Alternative Cost Distribution within this test script.  In case Position Management has been implemented from Upgrade Center in your Employee Central instance, you can continue also with chapters Take Action: Implicit Position Update or Take Action: Position Transfer within this test script. |  |  |

****

**Option 2**: via My Employee File

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR Administrator.   Note  In some cases, the employee’s line manager starts the process. In these cases, log on as a Line Manager. | The Home page is displayed. |  |
| 2 | Search for Employee | From the Home drop-down select the My Employee File. | The Employee Files for <user name> is displayed. |  |
| 3 | Select Employee | On the My Employee File screen, select from the <user name> button the drop-down arrow; in the Search box enter name parts of the employee and select the appropriate employee. | The Employee Files screen for the employee is displayed. |  |
| 4 | Select Actions Pushbutton | Select the Actions pushbutton located in the top right corner of the Employee Files screen. | The Actions pushbutton is expanded and an appropriate action can be selected. |  |
| 5 | Continue | To continue the process, proceed as described in one of the chapters Take Action: Job Change, Take Action: Transfer, Take Action: Pay Rate Change, Take Action: Spot Bonus, Take Action: Manage Recurring Deduction, Take Action: One Time Deduction or Take Action: Manage Alternative Cost Distribution within this test script.  In case Position Management has been implemented from Upgrade Center in your Employee Central instance, you can continue also with chapters Take Action: Implicit Position Update or Take Action: Position Transfer within this test script. |  |  |

 Note

In case Global Assignment Management has already been implemented in your Employee Central instance when executing Take Action processes and the respective employee is on global assignment, you can choose the appropriate assignment (home assignment or host assignment) for which changes should be made. For this you need to check the appropriate radio-button in the Header of the employee’s profile.

In case Concurrent Employment Management has already been implemented in your Employee Central instance when executing Take Action processes and the respective employee has a concurrent employment, you can choose the appropriate employment (primary or secondary) for which changes should be made. For this you need to check the appropriate radio-button in the Header of the employee’s profile.

## Take Action: Job Change

### Requesting Employee Job Change (process step outside software)

Purpose

An employee’s job needs to be changed within the organization. The Line Manager (called Supervisor in the Employee Central system) of the employee requests a job change for the same. The line manager sends this request to the HR administrator, asking him or her to enter the provided data into the system. This can be done for example via email, or phone call.

### Receiving Employee Job Change Request (process step outside software)

Purpose

The HR administrator has received the job change request from the line manager. He or she will start the process of changing the data in the system.

### Entering Job Change 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

The HR Administrator enters into the system the relevant job change data for an employee.

 Caution

Make sure that the employee has a second level manager; otherwise, the workflow to be triggered will not work properly.

Procedure

 Caution

In this document, we focus only on the mandatory fields to be filled (they are marked with an asterisk on the screen) and those optional fields which may need to be entered in order to achieve a meaningful employee master data record.

 Recommendation

For a complete list of event reasons relevant for the country where your company is located, you can refer to the HR Transactions workbook appropriate for <YourCountry>.

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on, search and select employee | Log on to Employee Central as an HR Administrator. Search and select an employee as described in the Note at the beginning of chapter Testing the Process Steps. |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select Change Job and Compensation Info.  Note  Alternatively, you can go to the Employment Information section, scroll there to the Job Information subsection, and choose in the Job Information block the Pencil (Edit) icon. |  | The Change Job and Compensation Info dialog box is displayed.  cid:image034.png@01D2E412.524280C0 Note  In case you have chosen to execute the job change directly from the Job Information block, the Job Information dialog box is displayed. You can skip test step # 3 and continue directly with test step # 4. |  |
| 3 | Select Type of **Change Job and Compensation Info** | In the Choose what you want to change block, flag the Job Information check box. |  | The When would you like your changes to take effect? field is displayed. |  |
| 4 | Enter Effective Date | Enter effective date of change. | When would you like your changes to take effect?: select using calendar icon | The Event field, and several blocks related to organizational and job information are displayed. |  |
| 5 | Enter Event | Select the event for the change. | Event: select Job Change from drop-down | Once you enter the Event, the Event Reason can be selected. |  |
| 6 | Enter Event Reason | Select the event reason for the change.   Note  This information is country-specific. | Event Reason: select from drop-down. Dependent on the country where your company is located, choose for example:   * for countries AE, FR, SA, US: Job Change to Higher Grade (JOBUGRDE) * for country AU: Full-time to Part-time(JOBFTPT) * for country CN: Location Change(JOBLOCN) * for country DE: Data Change/ Job Title Update(JOBTITLE) * for country GB: Change of Employee Class(JOBEMPCL) |  |  |
| 7 | Enter Job Information | Make changes in the Job Information block as appropriate*.*   Note  After entering the new value, the old value is displayed crossed out.   Note  This information is country-specific. | Enter data as appropriate.   Caution  Examples of fields to be adapted are given in chapter [Job Information](#_Compensation_Information). | The data affected by the job change can be reviewed. |  |
|  |  |  |
|  |  |
|  |  |
| 8 | Save Data | Choose the Save pushbutton. |  | A Job Change event triggers a workflow. The Please confirm your request dialog box appears on the screen. |  |
| 9 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request. |  |  |  |
| 10 | Check Approver(s) | In the dialog box, select the Show workflow participants link to verify the approver(s) of the request. |  | The employee’s second level manager is shown as approver. |  |
| 11 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed and you return to the employee’s Employment Information section. The message <Event Reason> pending approval (mm/dd/yy) is displayed in both the Job Information and Organizational Information subsections. The workflow has been sent to the next processor. |  |

 Note

In case email is configured and the email address of the employee’s second level manager is maintained in the system, he or she receives an automatic email about the workflow item needing his or her attention.

### Approving Job Change 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) | 2nd Level Manager | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The 2nd Level Manager of the employee approves the job change request for the employee in order for the changes to take effect in the system. Until the change is approved, the proposed change is pending and the change is displayed in both the Job Information and Organizational Information subsections of the employee’s profile.

 Note

The employee’s second level manager is the line manager of 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 a 2nd Level Manager. | The Home page 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. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the <Job Change Event Reason> For <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link 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. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Job and in field Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate <Job Change Event Reason> For <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the change 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 Job Information section contains the detailed change request.    Note  Most likely, for countries AE, AU, CN, DE, GB, FR, SA, the Compensation Information section might also be visible. If visible, then it may contain automatically generated changes in existing pay component(s), deletion of manually entered pay component amounts, etc. The changes depend on the preconfigured business rules delivered; for details on these refer to the Foundation Objects workbook appropriate for <YourCountry>. The amount(s) need to be manually changed back to the value the pay component(s) had in the preceding record(s). For details how to do this, refer to the  Caution below process step outside software 4.1.6 Receiving Job Change Completion Notification.   * In the Comment section, you can post your remarks to the change request. * On the right part of the screen a short profile of the employee for whom the change is requested is given, as well as administrative details to the request initiation. |  |
| 4 | Review Job Information | Review the details in the Job Information section. | The data for the job change has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approvebutton to approve the job change request. | The system generates a message about the successful approval of the workflow. You are directed back to your Home page. The change in job becomes effective the date as entered in the system and can be viewed by the HR administrator.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can 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. |  |

 Note

If required, you can also send the change request back to the HR administrator for further details. In this case, it is recommended to add a comment explaining your decision. The HR administrator can then either adapt the change request and resubmit it for approval, or cancel it.

 Caution

**Only in case integration with Employee Central Payroll is in place**, the job change 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).

### Notifying Line Manager and Employee about Job Change Completion (process step outside software)

Purpose

After the job change for the employee has been approved, the HR administrator notifies the line manager and the affected employee about the completion of the request. This can be done for example via email or phone call.

### Receiving Job Change Completion Notification (process step outside software)

Purpose

The line manager and the affected employee have received the notification from the HR administrator that the employee’s job data has changed starting an effective date.

 Caution

For the countries **AE**, **AU**, **CN**, **DE**, **FR**, **GB**, **SA**, during hiring or rehiring of the employee, country-specific pay component(s) related to basic pay has been generated automatically (possibly with a predefined amount), based on a preconfigured business rule, from the values maintained for fields Pay Scale Group and Pay Scale Level. Most likely, the HR Administrator has adapted the defaulted amount or has entered manually an amount, in case only the pay component value has been generated without any amount.

Also, during hiring or rehiring, the HR Administrator might have added a Pay Component related to recurring payments.

In addition, the employee might have experienced a possible promotion or demotion, in which recurring payments have been adapted, too.

Due to the job change performed, the preconfigured business rule will re-generate again automatically the same predefined (initial) amount for the pay component related to basic pay like during hiring or rehiring of the employee. Also, additional recurring pay components maintained previously might disappear.

In this case, the HR Administrator needs to manually change back or re-enter the pay componentrelated to the basic pay, and possibly add missing recurring payments such that the correct compensation information for the employee is obtained back again. For this, the HR Administrator can proceed as follows:

* Log on to Employee Central as an HR Administrator.
* Select from the Home drop-down My Employee Files, enter the employee’s name in the search box, and in the list of employees select the appropriate employee matching the search criteria.
* Go to the Employment Information section and there scroll to the Compensation Information subsection.
* Select the Clock (History) icon next to the Compensation Information block. In the Change History part of the upcoming Compensation Information Changes dialog box, select the appropriate record (most likely the one due to job change) and choose the Edit button. In the upcoming Edit History of Compensation Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date> and make the appropriate adaptions. For entering the employee’s previous data, you might consider the preceding history record.
* Save the data.

 Note

For the countries AU, AE, FR, SA, in case you have chosen a job change event reason that includes the adaption of the FTE field value, this impacts also the compensation information of the employee; the existing pay components(s) might be updated automatically. It needs to be verified if the suggested values for Pay Group and (Pay Component) Frequency fit to each other. If they do not, Pay Group, (Pay Component) Amount and (Pay Component) Frequency need to be adapted manually as described in the above Caution.

Note

For the countries AU, AE, FR, SA, US: in case the Time Off content has been implemented in your Employee Central instance, and you have chosen a job change event reason that includes the adaption of the FTE field value to become less than 1, then the annual leave / vacation entitlement also decreases and has to be adjusted manually.

 Note

For country **AU**, in case corrections to the job information of an employee need to be made without going through any approval processes, the HR Administrator can perform these corrections and add a note to the updates performed. For this, the HR Administrator can proceed as follows:

* Log on to Employee Central as an HR Administrator.
* Select from the Home drop-down My Employee Files, enter the employee’s name in the search box, and click in the list of employees matching the search criteria the appropriate employee.
* Go to the Employment Information section and scroll there 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 record and choose the Edit button.
* In the upcoming Edit History of Job Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date>.
* Make the correction as appropriate. In the Notes field, make a note to record the data changes done on the employee. For a correct change tracking, it is recommended that you add to your note also the date on which you made the change.
* Save the correction.
* In case corrections have been performed to fields, which influence the pay components (like, for example, pay scale group, pay scale level, FTE, etc.), you need to check the automatically updated values in the Compensation Information and Compensation blocks. In case the suggested values for Pay Group and (Pay Component) Frequency do not fit to each other, you need to adapt this manually. To do so, select the Clock (History) icon next to the Compensation Information block. In the Change History part of the upcoming Compensation Information Changes dialog box, select the appropriate record and choose the Edit button. In the upcoming Edit History of Compensation Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date> and make the appropriate adaptions. Make sure to adapt also the (Pay Component) Amount in this case such that the annual salary of the employee is preserved.

## Take Action: Transfer

### Requesting Employee Transfer (process step outside software)

Purpose

The line manager (called Supervisor in the Employee Central system), from whose area the employee is to be transferred, sends a request to the HR administrator, providing information about the selected employee and the new organizational details of the same, and asking him or her to enter the data into the system. This can be done for example via email, or phone call.

### Receiving Employee Transfer Request (process step outside software)

Purpose

The HR administrator has received from the line manager the request to execute a transfer for a direct report. He or she will start the process of changing the data in the system.

### Entering Transfer 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

Within an organization, an employee changes his or her company, department or cost center. The transfer also includes a new line manager (supervisor) for the employee. Thus, a transfer event needs to be executed for this employee.

In this process step, the HR Administrator enters transfer data for an employee.

Procedure

 Caution

In this document, we focus only on the mandatory fields to be filled (they are marked with an asterisk on the screen) and those optional fields which may need to be entered in order to achieve a meaningful employee master data record.

 Recommendation

For a complete list of event reasons relevant for the country where your company is located, you can refer to the HR Transactions workbook appropriate for <YourCountry>.

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Additional information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | Log on, search and select employee | Log on to Employee Central as an HR Administrator. Search and select an employee as described in the Note at the beginning of chapter Testing the Process Steps. |  |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select Change Job and Compensation Info. |  | Alternatively, you can go to the Employment Information section, scroll there to the Organizational Information subsection, and choose the Pencil (Edit) icon. | The Change Job and Compensation Info dialog box is displayed.  cid:image034.png@01D2E412.524280C0 Note  In case you have chosen to execute the transfer directly from the Organizational Information subsection, the Organizational Information dialog box is displayed. You can skip test step # 3 and continue directly with test step # 4. |  |
| 3 | Select Type of **Change Job and Compensation Info** | In the Choose what you want to change block, flag the Job Information check box. |  |  | The When would you like your changes to take effect? field is displayed. |  |
| 4 | Enter Effective Date | Enter effective date of change: | When would you like your changes to take effect?: select using calendar icon |  | The Event field, and several blocks related to organizational and job information are displayed. |  |
| 5 | Enter Event | Select the event for the change. | Event: select Transfer from drop-down |  | Once you enter the Event, the Event Reason can be selected. |  |
| 6 | Enter Event Reason | Select the event reason for the change.   Note  This information is country-specific. | Event Reason: select from drop-down. Dependent on the country where your company is located, choose for example:   * for countries AE, CN, FR, GB, SA, US: Transfer- Department Change (TRANDEPT) * for country AU: Manager Request (TRANMGRQ) * for country DE: Transfer – Employee Request (TRANEERQ) | The Transfer event reasons will be dependent on what is configured in your system. |  |  |
| 7 | Enter Organizational Information | Make changes in the Organizational Information block as appropriate*.*  Depending on the event reason chosen, different fields will need to be filled. | Example fields to be filled might include Department, Cost Center, Location, etc. | After entering the new value, the old value is displayed crossed out. |  |  |
| 8 | Maintain Job Information | Review the data existing in the Job Information block and adapt it as appropriate. | For example, select the employee’s new Supervisor.  Maintain other fields as appropriate, for example FTE, etc. |  |  |  |
| 9 | Maintain Time Off Information (Optional) | Caution  This test step might be relevant only for the following countries: AE, AU, FR, GB, SA, US.  In case the Time Off content has already been implemented in your Employee Central instance when executing the transfer action, you might need to adapt the data existing in the Time Off Information block. If the employee is transferred to another location, typically a new holiday calendar and time profile is assigned to the employee. Check the existing data and adapt if required. | Time Profile: adapt if appropriate | In case the Time Off content has been deployed with the SAP Best Practices, you can refer to chapter Preliminary Steps of test script Request and Manage Time Off (FJ7) appropriate for your country, for details in maintaining the time off relevant fields in the Time Off Information block. |  |  |
| Holiday Calendar Code: adapt if appropriate |  |
| Work Schedule: adapt if appropriate |  |
|  |  |
| Caution  This test step might be relevant only for the following countries: AE, AU, FR, GB, SA, US.  In case the Payroll Time Sheet content has already been implemented in your Employee Central instance when executing the transfer action, check the existing data and adapt if required. | Time Recording Profile: adapt if appropriate | In case the Payroll Time Sheet content has been deployed with the SAP Best Practices, you can refer to test script Record Working Time (15S), chapter Preliminary Steps, for details in maintaining the time sheet relevant fields in the Time Off Information block. |  |  |
| Time Recording Variant: adapt if appropriate |  |
| Time Recording Admissibility: adapt if appropriate |  |
| Default Overtime Compensation Variant: adapt if appropriate |  |
| 10 | Save Data | Choose the Save pushbutton. |  |  | The message Your changes were successfully saved is displayed and you return to the employee’s Employment Information section. |  |
| 11 | Verify Employee’s Transfer | Depending which fields have been maintained for the Transfer event, check in the Job Information and/or Organizational Information subsections that the changes are displayed. |  | In case the changes are effective on a future date, an appropriate link, Pending future change in Job Information (mm/dd/yy), will be visible in both the Job Information and Organizational Information subsections. Click this link to view the changes. |  |  |
| Caution  This test step might be relevant only for the following countries: AE, AU, FR, GB, SA, US.  In case the Time Off content has already been implemented in your Employee Central instance when executing the transfer action, depending if and what kind of data has been changed in the Time Off Information block, new time accounts have been created automatically. To check this, go to the Time Off section and in the Upcoming Time Off block select the Administer Time link. Go to the Time Accounts section, select in the Accounts as of Today link a date on which the employee’s transfer is effective, select the Account Types (#) link, and in the upcoming drop-down verify that new time account(s) are available. |  | The old time account(s) need to be closed manually. The remaining balance needs to be transferred manually, if wanted.   Note  In case the Time Off content has been deployed with the SAP Best Practices, you can refer to the Note at the end of the optional process step Adjusting Employee Time Accounts Manually in test script Request and Manage Time Off (FJ7) appropriate for your country. |  |  |

Note

In case the Time Off content has already been deployed with SAP Best Practices in your Employee Central instance when executing the transfer action, and the FTE value has been changed due to the transfer event, then depending on the country where your company is located, different situations occur:

* For the countries AU, AE, DE, FR, SA, and US: manual rework of data related to the vacation / annual leave entitlement of the employee needs to be performed. You can refer for details on this to process step Adjusting Employee Time Accounts Manually in test script of scope item Request and Manage Time Off (FJ7) appropriate for your country.
* For the country GB: the annual holiday entitlement is adapted automatically based on a recalculation rule. For more details on this rule, refer to the Time Off workbook for GB.

 Caution

**Only in case integration with Employee Central Payroll is in place**, the transfer 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).

### Notifying Line Manager and Employee about Transfer Completion (process step outside software)

Purpose

After the transfer data for the employee has been entered successfully into the system, the HR administrator notifies the line manager and the affected employee about the completion of the request. This can be done for example via email, or phone call.

### Receiving Transfer Completion Notification (process step outside software)

Purpose

The line manager and the affected employee have received the notification from the HR administrator that the employee’s transfer has become effective starting the date entered.

 Caution

For the countries **AE**, **AU**, **CN**, **DE**, **FR**, **GB**, **SA**, during hiring or rehiring of the employee, country-specific pay component(s) related to basic pay has been generated automatically (possibly with a predefined amount), based on a preconfigured business rule, from the values maintained for fields Pay Scale Group and Pay Scale Level. Most likely, the HR Administrator has adapted the defaulted amount or has entered manually an amount, in case only the pay component value has been generated without any amount.

Also, during hiring or rehiring, the HR Administrator might have added a Pay Component related to recurring payments.

In addition, the employee might have experienced a possible promotion or demotion, in which recurring payments have been adapted, too.

Due to the transfer performed, the preconfigured business rule will re-generate again automatically the same predefined (initial) amount for the pay component related to basic pay like during hiring or rehiring of the employee.

Also, additional recurring pay components maintained previously might disappear.

In this case, the HR Administrator needs to manually change back or re-enter the pay componentrelated to the basic pay, and possibly add missing recurring payments such that the correct compensation information for the employee is obtained back again. For this, the HR Administrator can proceed as follows:

* Log on to Employee Central as an HR Administrator.
* Select from the Home drop-down My Employee Files, enter the employee’s name in the search box, and in the list of employees select the appropriate employee matching the search criteria.
* Go to the Employment Information section and there scroll to the Compensation Information subsection.
* Select the Clock (History) icon next to the Compensation Information block. In the Change History part of the upcoming Compensation Information Changes dialog box, select the appropriate record (most likely the one due to transfer) and choose the Edit button. In the upcoming Edit History of Compensation Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date> and make the appropriate adaptions. For entering the employee’s previous data, you might consider the preceding history record.
* Save the data.

 Note

For country **AU**, in case corrections to the job information of an employee need to be made, the HR Administrator can perform these corrections and add a note to the updates performed. For this, the HR Administrator can proceed as follows:

* Log on to Employee Central as an HR Administrator.
* Select from the Home drop-down My Employee Files, enter the employee’s name in the search box, and click in the list of employees matching the search criteria the appropriate employee.
* Go to the Employment Information section and scroll there 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 record and choose the Edit button.
* In the upcoming Edit History of Job Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date>.
* Make the correction as appropriate. In the Notes field, make a note to record the data changes done on the employee. For a correct change tracking, it is recommended that you add to your note also the date on which you made the change.
* Save the correction.
* In case corrections have been performed to fields, which influence the pay components (like, for example, pay scale group, pay scale level, FTE, etc.), you need to check the automatically updated values in the Compensation Information and Compensation blocks. In case the suggested values for Pay Group and (Pay Component) Frequency do not fit to each other, you need to adapt this manually. To do so, select the Clock (History) icon next to the Compensation Information block. In the Change History part of the upcoming Compensation Information Changes dialog box, select the appropriate record and choose the Edit button. In the upcoming Edit History of Compensation Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date> and make the appropriate adaptions. Make sure to adapt also the (Pay Component) Amount in this case such that the annual salary of the employee is preserved.

## Take Action: Pay Rate Change

### Requesting Employee Pay Rate Change (process step outside software)

Purpose

There could be several reasons why an employee may receive a pay rate change, for example due to extraordinary performance or adjustments of his or her pay to fit to market requirements. The Line Manager (called Supervisor in the Employee Central system) of the employee requests a pay rate change for the same. The line manager sends this request to the HR administrator, asking him or her to enter the provided data into the system. This can be done for example via email, or phone call.

### Receiving Employee Pay Rate Change Request (process step outside software)

Purpose

The HR administrator has received the pay rate change request from the line manager and will start the process of changing the data in the system.

### Entering Pay Rate Change 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

The HR Administrator enters changes related to the pay rate of an employee.

 Caution

Make sure that the employee has a second level manager; otherwise, the workflow to be triggered will not work properly.

Procedure

 Caution

In this document, we focus only on the mandatory fields to be filled (they are marked with an asterisk on the screen) and those optional fields which may need to be entered in order to achieve a meaningful employee master data record.

 Recommendation

For a complete list of event reasons relevant for the country where your company is located, you can refer to the HR Transactions workbook appropriate for <YourCountry>.

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on, search and select employee | Log on to Employee Central as an HR Administrator. Search and select an employee as described in theNote at the beginning of chapter Testing the Process Steps. |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select Change Job and Compensation Info.  Note  Alternatively, you can go to the Employment Information section, scroll there to the Compensation Information subsection, and choose in the Compensation Information block the Pencil (Edit) icon. |  | The Change Job and Compensation Info dialog box is displayed.  cid:image034.png@01D2E412.524280C0 Note  In case you have chosen to execute the pay rate change directly from the Compensation Information block, the Compensation Information dialog box is displayed. You can skip test step # 3 and continue directly with test step # 4. |  |
| 3 | Select Type of **Change Job and Compensation Info** | In the Choose what you want to change block, flag the Compensation Information check box. |  | The When would you like your changes to take effect? field is displayed. |  |
| 4 | Enter Effective Date | Enter effective date of change: | When would you like your changes to take effect?:select using calendar icon | The Event field, and several blocks related to compensation information are displayed. |  |
| 5 | Enter Event | Select the event for the change. | Event: select Pay Rate Change from drop-down | Once you enter the Event, the Event Reason can be selected. |  |
| 6 | Enter Event Reason | Select the event reason for the change.  cid:image034.png@01D2E412.524280C0 Note  The event reasons will be dependent on what is configured in your system.   Note  This information is country-specific. | Event Reason: select from drop-down. Dependent on the country where your company is located, choose for example:   * for countries AE**,** AU, SA, US: Other Adjustment (PAYOTH) * for country CN: Merit (PAYMER) * for country DE: Market Adjustment (PAYMKT) * for countries FR, GB: Change Car Allowance (PAYCARALL) |  |  |
| 7 | Enter Compensation Information | In the Compensation block adapt the amount of existing pay component(s) if appropriate, or add a new pay component by selecting the ⊕ Add link and entering values as appropriate.  Note  In this document, we consider the example of adding a new pay component.  In case, you adapt an existing pay component, after entering the new value, the old value is displayed crossed out.   Note  This information is country-specific. | Enter data as appropriate.   Caution  Examples of fields to be adapted are given in chapter **[Compensation Information](#_Compensation_Information_2)**[.](#_Compensation_Information_2) | The data affected by the pay rate can be reviewed. |  |
|  |  |
|  |  |
|  |  |
| 8 | Set End Date of Payment (Optional) | In case you want to set end dates for payments, be it for already existing pay component(s) or for the newly added pay component, select the Define End Dates link located next to the title of the block (Compensation). |  | The Pay Component End Dates dialog box is displayed. |  |
| In the Pay Component End Dates dialog box, select for the appropriate pay component(s) the date on which the payment should end. | End Date (for <Pay Component>): select from calendar help |  |  |
| When done, choose the OK pushbutton. |  | You return to the Compensation block. |  |
| 9 | Save Data | Choose the Save pushbutton. |  | The Pay Rate Change event triggers a workflow. The Please confirm your request dialog box appears on the screen. |  |
| 10 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request. |  |  |  |
| 11 | Check Approver(s) | In the dialog box, select the Show workflow participants link to verify the approver(s) of the request. |  | The employee’s second level manager and the workflow group Payroll Group are shown as approvers. |  |
| 12 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed and you return to the employee’s Employment Information section. The message <Event Reason> pending approval (mm/dd/yy) is displayed in the Compensation Information subsection. The workflow has been sent to the next processor. |  |

 Note

In case email is configured and the email address of the employee’s second level manager is maintained in the system, he or she receives an automatic email about the workflow item needing his or her attention.

### Approving Pay Rate Change 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) | 2nd Level Manager | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The change in pay rate induces a two-step-workflow, where both the employee’s second level manager and a member of the workflow group Payroll Group need to approve the change before the data becomes active in the system. Until the change is approved by both approvers, the proposed change is pending and the change is displayed in the Compensation Information subsection of the employee’s profile.

In this process step, the 2nd Level Manager of the employee approves the pay rate change request for the employee.

 Note

The employee’s second level manager is the line manager of 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 a 2nd Level Manager. | The Home page 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. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the <Pay Rate Change Event Reason> For <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link 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. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Add Recurring Pay Component and in field Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate <Pay Rate Change Event Reason> For <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the change 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 Compensation Information section contains the detailed change request. * In the Comment section, you can post your remarks to the change request. * On the right part of the screen a short profile of the employee for whom the change is requested is given, as well as administrative details to the request initiation. |  |
| 4 | Review Compensation Information | Review the details in the Compensation Information section. | The data for the pay rate change has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approve button to approve the pay rate change request. | The system generates a message about the successful approval of the workflow. The workflow has been sent to the next processor. You are directed back to your Home page.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can 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. |  |

 Note

If required, you can also send the change request back to the HR administrator for further details. In this case, it is recommended to add a comment explaining your decision. The HR administrator can then either adapt the change request and resubmit it for approval, or cancel it.

 Note

In case email is configured and the email addresses of the members of the workflow group Payroll Group are maintained in the system, they receive automatic emails about the workflow item needing their attention.

### Processing Approved Pay Rate Change 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) | Member of workflow group Payroll Group | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

After the employee’s second level manager has approved the change in pay rate, the data change for the employee needs to be processed by a member of the workflow group Payroll Group, too. In particular, the Member of the workflow group Payroll Group needs to approve the data change, in order for the changes to take effect in the system. Until the change is approved, the proposed change is pending and the change is displayed in the Compensation Information subsection of the employee’s profile.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the workflow group Payroll Group. | The Home page 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. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the <Pay Rate Change Event Reason> For <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link 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. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Add Recurring Pay Component and in field Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate <Pay Rate Change Event Reason> For <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the change 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 Compensation Information section contains the detailed change request. * In the Comment section, you can post your remarks to the change request. * On the right part of the screen a short profile of the employee for whom the change is requested is given, as well as administrative details to the workflow activities until now. |  |
| 4 | Review Compensation Information | Review the details in the Compensation Information section. | The data for the pay rate change has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approve button to approve the pay rate change request. | The system generates a message about the successful approval of the workflow. You are directed back to your Home page. The change in pay rate becomes effective the date as entered in the system and can be viewed by the HR administrator.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can 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. |  |

 Note

If required, you can also send the change request back to request initiator (the HR administrator in this case) for further details. In this case, it is recommended to add a comment explaining your decision. The HR administrator can then either adapt the change request and resubmit it for approval, or cancel it.

 Note

Once the request is approved and changes have become effective in the system, if end date(s) for one or several pay components have been set, the message Pending future change in Compensation Information (mm/dd/yy) is displayed in the Compensation Information subsection of the employee’s Employment Information section. The HR Administrator can click on this message. In the Change History part of the upcoming Compensation Information Changes dialog box, besides the record related to the pay rate change performed, an additional record is available, highlighting the ending of one or several payments. The effective start date of this additional record is one day after the payment end date maintained in test step # 8 of process step Entering Pay Rate Change Data.

 Caution

**Only in case integration with Employee Central** **Payroll is in place**, the change in pay rate 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).

### Notifying Line Manager and Employee about Pay Rate Change Completion (process step outside software)

Purpose

After the pay rate change has been approved, the HR administrator notifies the line manager and the affected employee about the completion of the request. This can be done for example via email, or phone call.

### Receiving Pay Rate Change Completion Notification (process step outside software)

Purpose

The line manager and the affected employee have received the notification from the HR administrator that the employee’s pay rate has changed starting an effective date.

## Take Action: Spot Bonus

Purpose

Employees may receive spot bonuses as recognition of their hard work and outstanding results. A spot bonus is a one-time payment, meaning that it is not paid in every payroll period. A spot bonus is paid in a certain period by payroll. This data needs to be entered into the system such that it can be taken into account by payroll.

### Entering Spot Bonus 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) | Line Manager | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The Line Manager (called Supervisor in the Employee Central system) of the employee enters into the Employee Central system data related to a spot bonus the employee is going to receive.

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, search and select employee | Log on to Employee Central as a Line Manager. Search and select an employee as described in theNote at the beginning of chapter Testing the Process Steps. |  |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select Spot Bonus. |  | Alternatively, you can go to the Employment Information section, scroll there to the Pay Component Non Recurring subsection, and choose in the Spot Bonus block the Award Spot Bonus button. | The Spot Bonus dialog box is displayed. |  |
| 3 | Enter Spot Bonus Information | In the Spot Bonusdialog box make following entries: | Value:enter as appropriate | Recommendation  Required if integration with Employee Central Payroll is in place. |  |  |
| Issue Date: select using calendar icon | Today’s date is default date.   Recommendation  Required if integration with Employee Central Payroll is in place. |  |
| Type: select from drop-down a value appropriate for the country of your company. Choose, for example:   * for country AE: AE - Bonus payment (4010AE) * for country AU: AU-Bonus (1110AU) * for country CN: CN-Bonus (1140CN) * for country DE: DE – Bonus/Premiums (3300DE) * for country FR: FR - Bonus (1110FR) * for country GB: GB-Bonus (1110GB) * for country SA: SA - Bonus payment (4010SA) * for country US: US - Bonus (1110US) | Recommendation  Required if integration with Employee Central Payroll is in place. |  |
| Currency Code: defaulted to the currency of the company country upon selecting value for Type; leave as is | Recommendation  Required if integration with Employee Central Payroll is in place. |  |
| Alternative Cost Center: in case the spot bonus should be assigned to another cost center than the one maintained in the Organizational Information block of the employee, select the appropriate cost center from the drop-down; else ignore this field |  |  |
| 4 | Save Data | Choose the Save pushbutton. |  |  | The data is saved and is visible in the Pay Component Non Recurringsubsection of the employee’s Employment Informationsection. |  |

 Note

To make adaptions on an already existing spot bonus record, which has not been paid out to the employee yet, proceed as follows:

* Go to the Employment Information section, and there scroll to the Pay Component Non Recurringsubsection. Select the Pencil (Edit) icon next to the Spot Bonus block.
* In the upcoming Spot Bonus dialog box, adapt the data as appropriate and choose the Save button.
* In order to delete a record, choose in the Spot Bonus dialog box the Trash Bin icon next to that record and choose the Save button.

 Note

In addition to the procedure described above, you have also other options to add a spot bonus. This is described shortly in the following:

* Option 1: Go to the Employment Information section, and there scroll to the Pay Component Non Recurringsubsection. Select the Pencil (Edit) icon next to the Spot Bonus block. In the upcoming Spot Bonus dialog box, select the ⊕ Add button and enter data as appropriate. Then choose the Save button.
* Option 2: Go to the Employment Information section, and there scroll to the Pay Component Non Recurringsubsection. Select the ⊕ icon next to the Spot Bonus block. In the upcoming Spot Bonus dialog box, enter data as appropriate and choose the Save button.

 Caution

**Only in case integration with Employee Central** **Payroll is in place**, the spot bonus data is replicated to Employee Central Payroll into infotype 0015 (Additional Payments). 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).

### Notifying Employee about Spot Bonus (process step outside software)

Purpose

The line manager notifies the affected employee about the spot bonus he or she is going to receive. This can be done for example via email, or phone call.

### Receiving Spot Bonus Notification (process step outside software)

Purpose

The affected employee has received the notification from the line manager that a spot bonus will be issued to him or her on an effective date.

## Take Action: Manage Recurring Deductions

Purpose

In addition to possible recurring payments the employee is receiving every period, he or she may also need to pay every period a certain amount of money for different reasons, for example canteen fees. These recurring deductions are deducted directly from his or her compensation in every payroll period. This data needs to be entered into the system such that it can be taken into account by payroll.

### Requesting Employee Recurring Deduction (process step outside software)

Purpose

The Line Manager (called Supervisor in the Employee Central system) of the employee requests recurring deduction(s) to be paid by the same. The line manager sends this request to the HR administrator, asking him or her to enter the provided data into the system. This can be done for example via email, or phone call.

### Receiving Employee Recurring Deduction Request (process step outside software)

Purpose

The HR administrator has received the recurring deduction request from the line manager. He or she will start the process of entering the data in the system.

### Entering Recurring Deduction 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

The HR Administrator enters data related to the recurring deduction for an employee into the Employee Central system.

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, search and select employee | Log on to Employee Central as an HR Administrator. Search and select an employee as described in theNote at the beginning of chapter Testing the Process Steps. |  |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select Manage Recurring Deductions. |  | Alternatively, you can go to the Employment Informationsection, scroll there to the Recurring Deduction subsection, and choose in the Recurring Deduction block the Pencil (Edit) icon. | The Recurring Deduction dialog box is displayed. |  |
| 3 | Enter Recurring Deduction Information | In the Recurring Deductiondialog box make following entries: | When would you like your changes to take effect?:select using calendar icon | Today’s date is defaulted. |  |  |
| Pay Component: select from drop-down down a pay component appropriate for the country of your company. Choose for example:   * for country AE: AE - Recurring deduction (3000AE) * for country AU: AU - Cafeteria Deduction (2012AU) * for country CN: CN - Medical Insurance (2020CN) * for country DE: DE-Recurring Deduction(2100DE) * for country FR: FR - Recurring Deduction (2100FR) * for country GB: GB - Recurring Deduction (2100GB) * for country SA: SA - Recurring deduction (3000SA) * for country US: US - Cafeteria Deduction (2012US) | The field turns read-only after selecting a value.   Recommendation  Required if integration with Employee Central Payroll is in place. |  |  |
| Amount / Percentage / Number of units: enter amount as appropriate | Recommendation  Required if integration with Employee Central Payroll is in place. |  |
| Currency: defaulted to the currency of the company country upon entering the Pay Component; leave as is | Recommendation  Required if integration with Employee Central Payroll is in place. |  |
| Frequency: Monthly (MON)is defaulted upon entering the Pay Component; adapt if required | Recommendation  Required if integration with Employee Central Payroll is in place. |  |
| For country AU, you can attach a supporting document on the recurring deduction, if appropriate. For this, select the  icon next to field Attachment. In the Choose File to Upload dialog box, browse for the document you want to upload, and then choose Open. |  |  |  |
| 4 | Enter AdditionalRecurring Deduction (optional) | If appropriate, repeat test step # 3 for other pay components related to recurring deductions. To add another recurring deduction record, select the Add button located on the bottom left corner of the Recurring Deduction dialog box and make entries as appropriate. |  |  |  |  |
| 5 | Save Data | Choose the Save pushbutton. |  |  | The data is saved and is visible in the Recurring Deduction subsection of the employee’s Employment Informationsection. |  |

 Note

To make adaptions on an already existing recurring deduction record, which has not yet been deducted from the employee’s compensation, proceed as follows:

* Go to the Employment Information section, and there scroll to the Recurring Deduction subsection. Select the Clock (History) icon next to the Recurring Deduction block. Continue with one of the possibilities enumerated below:
* To update a record, select in the Change History part of the upcoming Recurring Deduction Changes dialog box the appropriate record and choose the Edit button. In the Edit History of Recurring Deduction on <record creation date> dialog box leave the date in the When would you like your changes to take effect? field as is and make the appropriate correction. When done, choose the Save button. The data is saved and is visible in the Recurring Deduction subsection of the employee’s Employment Information section.
* To delete a record, select in the Change History part of the upcoming Recurring Deduction Changes dialog box the appropriate record and choose the Delete button. Confirm your choice by choosing again the Delete button.
* In case there are several pay components in a record and you want to delete one of them, choose in the Change History part of the upcoming Recurring Deduction Changes dialog box the appropriate record and choose the Edit button. In the upcoming dialog box, choose the Trash Bin icon next to the pay component you want to delete and choose the Save button.

 Caution

**Only in case integration with Employee Central** **Payroll is in place**, the recurring deduction data is replicated to Employee Central Payroll into infotype 0014 (Recurring Payments/Deductions). 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).

### Notifying Line Manager and Employee about Recurring Deduction Completion (process step outside software)

Purpose

The HR administrator notifies the line manager and the affected employee about the completion of the recurring deduction request. This can be done for example via email, or phone call.

### Receiving Recurring Deduction Completion Notification (process step outside software)

Purpose

The line manager and the affected employee have received the notification from the HR administrator that recurring deduction(s) will be deducted from the employee’s compensation starting an effective date.

## Take Action: One Time Deduction

Purpose

In contrary to the spot bonus, which is a one-time payment the employee receives, he or she might also need to pay once a certain amount of money for different reasons. This one-time deduction is deducted directly from his or her payment in a certain payroll period. This data needs to be entered into the system such that it can be taken into account by payroll.

### Requesting Employee One Time Deduction (process step outside software)

Purpose

The Line Manager (called Supervisor in the Employee Central system) of the employee requests a one deduction for the same. The line manager sends this request to the HR administrator, asking him or her to enter the provided data into the system. This can be done for example via email, or phone call.

### Receiving Employee One Time Deduction Request (process step outside software)

Purpose

The HR administrator has received the one time deduction request from the line manager. He or she will start the process of entering the data in the system.

### Entering One Time Deduction 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

The HR Administrator enters data related to the one time deduction for an employee into the Employee Central system.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on, search, and select employee | Log on to Employee Central as an HR Administrator. Search and select an employee as described in theNote at the beginning of chapter Testing the Process Steps. |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select One Time Deduction.  Note  Alternatively, you can go to the Employment Information section, scroll there to the One Time Deduction subsection, and choose in the One Time Deduction block either the ⊕ icon or the Add One-time Deduction button. |  | The One Time Deduction dialog box is displayed. |  |
| 3 | Enter One Time Deduction Information | In the One Time Deductiondialog box make following entries: | Deduction Date:select using calendar icon |  |  |
| Pay Component: select from drop-down a value appropriate for the country of your company. Choose, for example:   * for country AE: AE - Misc. Deductions (5100AE) * for country AU: AU - One Time Deduction (2150AU) * for country CN: CN - One Time Deduction (2000CN) * for country DE: DE- One Time Deduction(2150DE) * for country FR: FR - One Time Deduction (2000FR) * for country GB: GB - One Time Deduction (2000GB) * for country SA: SA-Canteen deduction(5020SA) * for country US: US - Miscellaneous Deduction(2011US) |  |
| Amount / Percentage / Number of units: enter amount as appropriate |  |
| Currency: defaulted to the currency of the company country upon entering the Pay Component; leave as is |  |
| For country AU, you can attach a supporting document on the one time deduction, if appropriate. For this, select the  icon next to field Attachment. In the Choose File to Upload dialog box, browse for the document you want to upload, and then choose Open. |  |  |
| 4 | Save Data | Choose the Save pushbutton. |  | The data is saved and is visible in the One Time Deductionsubsection of the employee’s Employment Informationsection.  The ID of the record is automatically generated and is visible when editing the appropriate one time deduction record. |  |

 Note

To make adaptions on an already existing one-time deduction record, which has not yet been deducted from the employee’s compensation, proceed as follows:

* Go to the Employment Information section, and there scroll to the One Time Deduction subsection. Select the Pencil (Edit) icon next to the One Time Deduction block.
* In the One Time Deduction dialog box, select the Pencil icon next to the record you want to adapt. The fields become editable and you can make the appropriate adaptions. When done, choose the Save button. The data is saved and is visible in the One Time Deduction subsection of the employee’s Employment Information section.
* In order to delete a record, choose in the One Time Deduction dialog box the Trash Bin icon next to that record and choose the Save button.

 Caution

**Only in case integration with Employee Central** **Payroll is in place**, the one-time deduction data is replicated to Employee Central Payroll into infotype 0015 (Additional Payments). 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).

### Notifying Line Manager and Employee about One Time Deduction Completion (process step outside software)

Purpose

The HR administrator notifies the line manager and the affected employee about the completion of the one-time deduction request. This can be done for example via email, or phone call.

### Receiving One Time Deduction Completion Notification (process step outside software)

Purpose

The line manager and the affected employee have received the notification from the HR administrator that one time deduction will be deducted from the employee’s compensation starting an effective date.

## Take Action: Manage Alternative Cost Distribution

Purpose

The costs incurred by an employee, for example salary or wage, are usually written to the cost center maintained in the Organizational Information block of the employee. Situations can occur in which these costs need to be distributed to more than one cost center, for example if the employee’s job / position is assigned in different portions to different cost centers. In addition, it might be required that the employee records his or her work in specific projects to specified cost centers, others than his or her master cost center.

### Entering Alternative Cost Distribution 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

The HR Administrator maintains data related to the distribution of costs, which are incurred by an employee, to different cost centers.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on, search, and select employee | Log on to Employee Central as an HR Administrator. Search and select an employee as described in the Note at the beginning of chapter Testing the Process Steps. |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select Manage Alternative Cost Distribution. |  | The Alternative Cost Distribution dialog box is displayed. |  |
| 3 | Enter Alternative Cost Distribution Information | In the Alternative Cost Distribution dialog box make following entries:  Note  You can enter several cost centers for one employment. The total percentage of all cost centers cannot be higher than 100 %. If the total percentage of all cost centers entered in the Alternative Cost Distribution dialog box is less than 100 %, the remaining percentage is deducted from the cost center that has been maintained for the employee in the Organizational Information block. You can also add in the Alternative Cost Distribution dialog box the cost center that has been maintained in the Organizational Information block of the employee.  To add another cost center, select the Add button located on the bottom left corner of the Alternative Cost Distribution dialog box. | When would you like your changes to take effect?:select using calendar icon  Note  Today’s date is defaulted. |  |  |
| Cost Center: select from drop-down  Note  In case the relevant cost center is not yet available in the drop-down, you can create it by selecting the ⊕ icon next to the field. |  |
| Percentage: enter as appropriate |  |
| 4 | Save Data | Choose the Save pushbutton. |  | The data is saved and is visible in the Alternative Cost Distribution subsection of the employee’s Employment Informationsection. |  |

 Note

To make adaptions on an already existing alternative cost distribution record, proceed as follows:

* Go to the Employment Information section, and there scroll to the Alternative Cost Distribution subsection. Select the Clock (History) icon next to the Alternative Cost Distribution block.
* In the Change History part of the upcoming Alternative Cost Distribution Changes dialog box, select the appropriate record and choose the Edit button.
* In the Edit History of Alternative Cost Distribution on <record creation date> dialog box leave the date in the When would you like your changes to take effect? field as is and make the appropriate correction.
* When done, choose the Save button. The data is saved and is visible in the Alternative Cost Distribution subsection of the employee’s Employment Information section.

 Caution

**Only in case integration with Employee Central** **Payroll is in place**, the alternative cost distribution data is replicated to Employee Central Payroll into infotype 0027 (Cost Distribution). 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).

## Take Action: Implicit Position Update (if Position Management implemented)

Purpose

 Caution

This chapter is relevant only in case Position Management has been implemented in your Employee Central instance!

In case Position Management has not been implemented in your Employee Central instance, please ignore the entire chapter!

If Position Management has been implemented in your Employee Central instance, one or more employees will be assigned to a position.

 Note

For more details on this, you can refer to test scripts of scope items Manage Positions (FK1) (for creating positions) and Add New Employee / Rehire (FJ0) (for hiring/rehiring employees on these positions).

In case employees already exist in the Employee Central instance at the point in time when Position Management is implemented, 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).

In the Organizational Information subsection of the Employment Information section, an additional block, Position Information, is displayed, containing the fields Position and Position Entry Date.

In this chapter, following situations are considered as implicit position update: position reclassification and transfer to another line manager. The employee’s line manager can request the position reclassification for that employee, whereas the transfer of the employee to another line manager is reserved to the HR administrator. In the first case, a workflow item is triggered, which needs to be approved by a member of the HR Administrator dynamic group. In the second case, no approval of a member of the HR Administrator dynamic group is required; instead, the changes are saved immediately. The second use case is shortly described in process step 4.8.3 Updating Employee Line Manager.

Before detailing the process steps for this action, a short overview is given about job information to position synchronization, position reclassification and transfer to another line manager, and shared position.

**Job Info to Position synchronization**

Changes in the employee’s job information via Take Action can be reflected in updates of the position occupied by the employee. Common fields between the Position object and the jobInfo employment object are synchronized when changes are made in the jobInfo employment object that the system regards as a position reclassification or position transfer.

**Position Reclassification/Transfer**

A position reclassification is required when changes in the job information (for example new job title, new location, and so on) are performed, whereas a position transfer is required if the line manager changes.

Note

If any integration with SAP ERP or SAP S/4HANA is planned, the job title is not allowed to be changed.

The customer can implement a propagation rule, in which the common position / job information fields, which should be synchronized, are defined. The rule is triggered whenever the system is to treat an action performed via Take Action as a position reclassification or transfer to another line manager. For more details on defining such a rule, refer to the Position Management workbook.

**Regular Position/Shared Position**

A position allowing only one incumbent at a time is a regular position. In case more than one employee may be assigned to a position at a time, we talk about a shared position.

In the following a detailed process description is given, including the system behavior in case a position reclassification or transfer to another line manager is required.

 Recommendation

For ease of consumption of the documentation within this chapter, it is recommended to check in parallel the process flow sketched in the appropriate process diagram FJ1\_SFHCM1802\_Process\_Overview\_EN\_XX.pptx.

### Requesting Employee Job Information Change

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

An employee’s position needs to be reclassified within the organization. The Line Manager (called Supervisor in the Employee Central system) of the employee requests a job information change for the same.

Procedure

 Recommendation

In case you are interested in additional event reasons than the ones given in this test script, you can refer to the Position Management workbook.

 Caution

If any integration with SAP ERP or SAP S/4HANA is planned, you are not supposed to change the employee’s job title! A change in job title would lead to inconsistencies in the organizational data replication. Therefore, the appropriate permissions for executing the event reason New Job Title (NEWJOBTITLECHG) and changing the job title have been revoked from your role.

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on, search and select employee | Log on to Employee Central as a Line Manager. Search and select an employee as described in the Note at the beginning of chapter Testing the Process Steps. |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select Change Job and Compensation Info.  Note  Alternatively, you can go to the Employment Information section, scroll there to the Job Information subsection, and choose in the Job Information block the Pencil (Edit) icon. |  | The Change Job and Compensation Info dialog box is displayed.  cid:image034.png@01D2E412.524280C0 Note  In case you have chosen to execute the job information change directly from the Job Information block, the Job Information dialog box is displayed. You can skip test step # 3 and continue directly with test step # 4. |  |
| 3 | Select Type of **Change Job and Compensation Info** | In the Choose what you want to change block, flag the Job Information check box. |  | The When would you like your changes to take effect? field is displayed. |  |
| 4 | Enter Effective Date | Enter effective date of change. | When would you like your changes to take effect?: select using calendar icon | The Event field, and several blocks related to organizational and job information are displayed. |  |
| 5 | Enter Event | Select the event for the change. | Event: select Data Change from drop-down | Once you enter the Event, the Event Reason can be selected. |  |
| 6 | Enter Event Reason | Select the event reason for the change. | Event Reason: select New Location (NEWLOC) or New Job Title (NEWJOBTITLECHG) from drop-down | Continue with one of the two options mentioned in test step # 7. |  |
| 7 | Update Job Information Details | Make entries as appropriate, depending on the event reason chosen in test step # 6: |  |  |  |
| Option 1: in case you have chosen event reason New Location (NEWLOC), enter a new location in the Organizational Information block. | Location: select from drop-down |  |  |
| Option 2: in case you have chosen event reason New Job Title (NEWJOBTITLECHG), update the job title in the Job Information block. | Job Title: enter a new job title |  |  |
| 8 | Save Data | Choose the Save pushbutton. |  | The Please confirm your request dialog box displays on the screen. |  |
| 9 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request. |  |  |  |
| 10 | Check Approvers | In the dialog box, select the Show workflow participants link to verify the approver(s) of the request. |  | The HR Administrator dynamic group is shown as approver. |  |
| 11 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed and you return to the employee’s Employment Information section. The message <Event Reason> pending approval (mm/dd/yy) is displayed in both the Job Information and Organizational Information subsections; the link is read only, meaning, you cannot access it. The workflow has been sent to the next processor. |  |

#### Receiving Employee Job Information Change Request Notification

Purpose

It is assumed that email is configured and the email addresses of all employees are maintained in the system. Under this assumption, the members of the HR Administrator dynamic group have received an email notification informing them that the Line Manager has submitted a job information change request for one of his or her subordinated employees.

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

### Processing Employee Job Information Change Request

Purpose

The workflow item containing the job information change request for an employee has been sent to the HR Administrator dynamic group for further processing. One of the members of the HR Administrator dynamic group picks up the workflow item. After checking the data maintained in the request, he or she either approves the request or sends the form back to the requesting manager. In the first case, the changes of the employee’s job information become effective in the system, inducing also a change in the employee’s assigned position. In the second case, the form is sent back to the line manager; he or she needs to update and resubmit it again for approval by the HR Administrator dynamic group.

In the following, these two options are described in detail. You need to execute only one of them.

#### Option 1: Approving Employee Job Information Change 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) | Member of dynamic group HR Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

A Member of the HR Administrator dynamic group needs to approve the change in the employee’s job information in order for the changes to take effect in the system. Until the change is approved, the proposed change is pending and the change is displayed in both the Job Information and Organizational Information subsections of the employee’s profile.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the dynamic group HR Administrator. | The Home page 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. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the <Job Change Event Reason> For <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link 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. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Job and in field Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate <Job Change Event Reason> For <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the change 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. * Depending if the line manager has requested a change in location or job title, the Organizational Information or Job Information sections are visible, containing details to these changes,    Note  Most likely, for countries AE, AU, CN, DE, GB, FR, SA, the Compensation Information section might also be visible. If visible, then it may contain automatically generated changes in existing pay component(s), deletion of manually entered pay component amounts, etc. The changes depend on the preconfigured business rules delivered; for details on these refer to the Foundation Objects workbook appropriate for <YourCountry>. The amount(s) need to be manually changed back to the value the pay component(s) had in the preceding record(s). For details how to do this, refer to the  Caution at the end of chapter 4.8 below process step 4.8.4 Viewing Employee Position Details.   * In the Comment section, you can post your remarks, if you consider appropriate. * On the right part of the screen a short profile of the employee for whom the change is requested is given, as well as administrative details to the request initiation. |  |
| 4 | Review Job Information Details | Review the details in the Organizational Information or Job Information section. | The data for the job information change has been reviewed; these are complete and correct. |  |
| 5 | Approve Request | If everything is fine, choose the Approvebutton to approve the job information change request. | The system generates a message about the successful saving of the data. You are directed back to your Home page. The change in job information becomes effective the date as entered in the system and can be viewed by the line manager.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can 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.  Under the assumption that email is configured and the email addresses of both the requesting line manager and the employee is maintained in the system, they receive automatic notifications about the effective change in job information.   Note  These automatic steps are described in the subsequent 4 chapters.  Depending if the employee for whom the change in job information has been performed is assigned to a position that may have more than one incumbent, the system’s reaction differs. For details, refer to the Result section below this table. |  |

Result

In case the employee for whom the change in job information has been performed is assigned to a position that may have more than one incumbent, the system’s reaction differs:

* If only one employee may be assigned at a time to that position (regular and not mass position)

The system will update the assigned Position Object with changes done from the Job Information Object based on the defined synchronization rule.

* If more than one employee may be assigned at a time (shared position) and at least another employee is assigned to the position at the same time with the employee who experiences a job information change

The system does not change the position. Instead, it first searches for an existing suitable position with status To Be Hired below the higher-level position of the position to which the employee is assigned. If it does not find a position, it creates a new position below this higher-level position and assigns the employee to this new position. This does not affect direct reports and lower-level positions. Note that if a new position is created, it is created with the current FTE value of the employee assigned to the position. The attributes of the employee’s original position remain unchanged.

In the employee’s file, the Position field in the Position Information block of the Organizational Information subsection is updated with the new position created as result of the position reclassification.

 Caution

**Only in case integration with Employee Central Payroll is in place**, the changed 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).

##### Option 1 (continued): Sending Employee Job Information Change Completion Notification

Purpose

It is assumed that email is configured and the email addresses of all employees are maintained in the system. Under this assumption, after a member of the HR Administrator dynamic group has approved the workflow item containing the job information change request, an email is sent out to the line manager, notifying him or her that the change has become effective in the system.

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

##### Option 1 (continued): Receiving Employee Job Information Change Completion Notification

Purpose

The requesting Line Manager has received the notification that a member of the HR Administrator dynamic group has approved the change in the employee’s job information he or she has requested. He or she can access the system via the link provided in this email to check details to the workflow activities.

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

##### Option 1 (continued): Notifying Employee about Job Information Change

Purpose

After the job information change request induced by a line manager for one of his or her direct reports has been approved, an email is sent out to that particular employee, notifying him or her about changes in his or her job information.

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

##### Option 1 (continued): Receiving Job Information Change Notification

Purpose

The employee has received a notification about changes in his or her job information induced by the line manager.

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

 Recommendation

Continue in the process execution with process step 4.8.4 Viewing Employee Position Details.

#### Option 2: Sending Back Employee Job Information Change Request for Correction

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) | Member of dynamic group HR Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

In case adaptions to the job information change request are required, the member of the HR Administrator dynamic group sends the form back to the line manager and requests him or her to provide the missing information or correct wrong attributes.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the dynamic group HR Administrator. | The Home page 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. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the <Job Change Event Reason> For <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link 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. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Job and in field Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate <Job Change Event Reason> For <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the change 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. * Depending if the line manager has requested a change in location or job title, the Organizational Information or Job Information sections are visible, containing details to these changes.    Note  Most likely, for countries AE, AU, CN, DE, GB, FR, SA, the Compensation Information section might also be visible. If visible, then it may contain automatically generated changes in existing pay component(s), deletion of manually entered pay component amounts, etc.   * In the Comment section, you can post your remarks, if you consider appropriate. * On the right part of the screen a short profile of the employee for whom the change is requested is given, as well as administrative details to the request initiation. |  |
| 4 | Review Job Information Details | Review the details in the Organizational Information or Job Information section. | The requested updates to the job information have been reviewed. The submitted changes in job information are incomplete and/or incorrect. |  |
| 5 | Send Request Back | In case information is missing or is incorrect, send the form back to the requesting line manager. Enter an explaining comment, e.g. specify which data is missing, and choose the Send Backbutton. | The Send Back Request dialog box is displayed, informing you that the request will be sent back to the request initiator (line manager in this case) and he or she will be notified. |  |
| 6 | Confirm your Choice | Choose again the Send Backbutton. | The system generates a success message and you are directed back to your Home page. The workflow has been sent back to the requesting line manager for updating it.   Note  In case you have sent the request back starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can 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.  Continue with process steps 4.8.2.2.1 Receiving Correction Request for Employee Job Information and 4.8.2.3. Adapting Employee Job Information Change Request. Afterwards, a member of the HR Administrator dynamic group needs to process the request again. |  |

##### Option 2 (continued): Receiving Correction Request for Employee Job Information

Purpose

In case details in the job information change request are missing or are incorrect, the Line Manager receives an automatic e-mail from the member of the HR Administrator dynamic group with the request to provide this information.

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

#### Option 2 (continued): Adapting Employee Job Information Change 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

In case the member of the HR Administrator dynamic group has sent back the job information change request to the Line Manager, requesting additional information, the Line Manager updates the job information details based on the feedback from the member of the HR Administrator dynamic group. Then, he or she resubmits the request.

Procedure

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Go to your e-mail inbox and search the e-mail from the member of the HR Administrator dynamic group who has requested for more information.  Note  The subject of this email states something like “The Change Job action for <employee name> has been sent back by <HR administrator name>.”  Open this e-mail and choose the available hyperlink. You are directed to the Employee Central login screen, where you need to enter your password (your username is already filled by default). | Alternatively, you can log on to Employee Central, go on the Home page to theTo Dosection and click on the Approve Requests tile. In the upcoming Approve Requests dialog box, click on the <Job Change Event Reason> For <Employee Name> link. | You are directed to the Employee Files > Workflow Details page containing details to the request. |  |
| 2 | Update Request | To correct the wrong data, select the Update link at the bottom of the page. |  | The Job Information dialog box is displayed, containing the editable fields. |  |
| 3 | Correct Details | Correct the wrong data (either location or job title), as per the comment written by the member of the HR Administrator dynamic group in his or her rejection. |  |  |  |
| 4 | Save Corrections | When done, choose the Save button. |  | The Please confirm your request dialog box displays on the screen. |  |
| 5 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request. |  |  |  |
| 6 | Check Approvers | In the dialog box, select the View Workflow Participants link to verify the approvers of the request. |  | The HR Administrator dynamic group is shown as approver. |  |
| 7 | Confirm Workflow | Select the Confirm button. |  | The job information change request has been resubmitted.  A new approval process is triggered, and a member of the HR Administrator dynamic group needs to approve the request.  Note  To follow the new loop in the approval process, continue as described in process step 4.8.2 Processing Employee Job Information Change Request and subsequent. |  |

### Updating Employee Line Manager (Optional)

 Caution

This process step is only relevant for the following countries: AE, AU, CN, FR, GB, SA, US.

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

As mentioned in the beginning of this chapter 4.8 Take Action: Implicit Position Update, the use case of assigning a new line manager to an employee is executed by the HR Administrator. In this case, no approval is required; instead, the changes are saved immediately.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on, search and select employee | Log on to Employee Central as an HR Administrator. Search and select an employee as described in the Note at the beginning of chapter Testing the Process Steps. |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select Change Job and Compensation Info.  Note  Alternatively, you can go to the Employment Information section, scroll there to the Job Information subsection, and choose in the Job Information block the Pencil (Edit) icon. |  | The Change Job and Compensation Info dialog box is displayed.   Note  In case you have chosen to change the line manager directly from the Job Information block, the Job Information dialog box is displayed. You can skip test step # 3 and continue directly with test step # 4. |  |
| 3 | Select Type of **Change Job and Compensation Info** | In the Choose what you want to change block, flag the Job Information check box. |  | The When would you like your changes to take effect? field is displayed. |  |
| 4 | Enter Effective Date | Enter effective date of change. | When would you like your changes to take effect?: select using calendar icon | The Event field, and several blocks related to organizational and job information are displayed. |  |
| 5 | Enter Event | Select the event for the change. | Event: select Data Change from drop-down | Once you enter the Event, the Event Reason can be selected. |  |
| 6 | Enter Event Reason | Select the event reason for the change. | Event Reason: select Supervisor Change Only (JOBSUPRV)from drop-down |  |  |
| 7 | Enter Position Information | In the Job Information block, change fields related to the position: | Supervisor: select line manager from drop-down |  |  |
| 8 | Save Data | Choose the Save pushbutton. |  | The message Your changes were successfully saved is displayed and you return to the employee’s Employment Information section.  The system reacts in the same way, no matter if only one employee or more employees may be assigned to the position. If the system does not find a suitable vacant position below the new line manager’s position, it creates a new position below the new line manager’s position and assigns the employee to this position. This new position is visible in the Position Information block of the Organizational Information subsection.  The old position is updated accordingly. If direct reports were assigned to the transferred employee, these direct reports are assigned to the employee’s previous line manager. Lower-level positions are not changed. |  |

### Viewing Employee Position 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) | Line Manager | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The Line Manager views if the position of the employee, for whom a change in job information (for example, new job title or new location) has been approved, has been updated correctly.

Depending if the position, to which the employee has been assigned before the change in job information, is a regular, non-mass position or a shared position, the system behavior is different and the Line Manager needs to pay attention to different details.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Line Manager. | 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 Employee | Go to the Position Org Chart tab.  In the Search By field, select value People from the drop-down.  In the Search field, enter name or name parts of the employee for whom the position change action has been performed. Select the appropriate employee from the list of suggested persons.  Click on the calendar icon  located in the top right corner of the screen and select from calendar help the date the employee’s position change becomes effective (or a date after the change date). | The position hierarchy is displayed starting with the position hold by the employee, as well as the direct lower-level positions (if any).  Depending if one or more employees could be assigned to the employee’s position before the position change became effective, different situations occur. These are detailed below. |  |
| 4 | Verify Position Details | Situation 1:  The employee was assigned before the action to a regular and not mass position:   * Choose the employee’s position. In the upcoming side panel, next to the position choose the Show Position  icon located below <position title (code)> and next to as of <selected date>. Details of the position are displayed. Verify that the common fields between Job Info object and Position object (more precisely, location and/or job title) have been updated as expected based on the defined synchronization rule.   Situation 2:  The employee was assigned before the action to a shared position, to which at least another employee is also assigned to:   * Verify that the employee is assigned to a new position starting the date the change became effective. * Search for the employee’s old position: * In the Search By field, select value Positions from the drop-down. In the Search field, select the old position of the employee from the drop-down. * Click on the calendar icon  located in the top right corner of the screen and select from calendar help the date the employee’s position change becomes effective. * Verify that the employee’s name is not displayed anymore in the graphical representation of the position and that the number of incumbents of the position has decreased accordingly. * Click on the position and in the upcoming side panel click on Position History. Verify that the last change date of the position’s attributes coincides with the date the employee’s position change becomes effective. |  |  |

 Note

In a similar way, the HR Administrator can view if the position of the employee, to whom a new line manager has been assigned (as described in optional process step Updating Employee Line Manager), has been updated correctly. For this, the HR Administrator needs to check the following:

* if a new position has been created for the employee below the new line manager’s position, and
* if in the employee’s old position, the employee’s name is no longer visible. In addition, number of FTEs and possibly To Be Hired field should have been updated accordingly. In case of a regular position, field To Be Hired has value No, as we recommend checking explicitly whether headcount is still available or not for that position. In case headcount is available, adapt the position data manually.

 Caution

For the countries **AE**, **AU**, **CN**, **DE**, **FR**, **GB**, **SA**, during hiring or rehiring of the employee, country-specific pay component(s) related to basic pay has been generated automatically (possibly with a predefined amount), based on a preconfigured business rule, from the values maintained for fields Pay Scale Group and Pay Scale Level. Most likely, the HR Administrator has adapted the defaulted amount or has entered manually an amount, in case only the pay component value has been generated without any amount.

Also, during hiring or rehiring, the HR Administrator might have added a Pay Component related to recurring payments.

In addition, the employee might have experienced a possible promotion or demotion, in which recurring payments have been adapted, too.

Due to the implicit position update performed, the preconfigured business rule will re-generate again automatically the same predefined (initial) amount for the pay component related to basic pay like during hiring or rehiring of the employee.

Also, additional recurring pay components maintained previously might disappear.

In this case, the HR Administrator needs to manually change back or re-enter the pay componentrelated to the basic pay, and possibly add missing recurring payments such that the correct compensation information for the employee is obtained back again. For this, the HR Administrator can proceed as follows:

* Log on to Employee Central as an HR Administrator.
* Select from the Home drop-down My Employee Files, enter the employee’s name in the search box, and in the list of employees select the appropriate employee matching the search criteria.
* Go to the Employment Information section and there scroll to the Compensation Information subsection.
* Select the Clock (History) icon next to the Compensation Information block. In the Change History part of the upcoming Compensation Information Changes dialog box, select the appropriate record (most likely the one due to implicit position update) and choose the Edit button. In the upcoming Edit History of Compensation Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date> and make the appropriate adaptions. For entering the employee’s previous data, you might consider the preceding history record.
* Save the data.

 Note

For country **AU**, in case corrections to the job information of an employee need to be made, the HR Administrator can perform these corrections and add a note to the updates performed. For this, the HR Administrator can proceed as follows:

* Log on to Employee Central as an HR Administrator.
* Select from the Home drop-down My Employee Files, enter the employee’s name in the search box, and click in the list of employees matching the search criteria the appropriate employee.
* Go to the Employment Information section and scroll there 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 record and choose the Edit button.
* In the upcoming Edit History of Job Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date>.
* Make the correction as appropriate. In the Notes field, make a note to record the data changes done on the employee. For a correct change tracking, it is recommended that you add to your note also the date on which you made the change.
* Save the correction.

## Take Action: Position Transfer (if Position Management implemented)

 Caution

This chapter is only relevant for the following countries: AU, US.

Purpose

If Position Management has been implemented in your Employee Central instance with the SAP Best Practices, a position transfer process can be executed for an employee from his or her current position to another position outside the area of responsibility of the current manager. After the process has run, the employee's master data is up to date.

 Caution

In case Position Management has not been implemented in your Employee Central instance, please ignore the entire chapter!

Note

For details on hiring/rehiring an employee on a position, you can refer 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 implemented, 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 Employee Position Transfer (process step outside software)

Purpose

The line manager (called Supervisor in the Employee Central system), from whose area the employee is to be transferred, sends a request to the HR administrator, providing information about the selected employee and details to the new position he or she should occupy in the near future, and asking him or her to enter the data into the system. This can be done for example via email, or phone call.

### Receiving Employee Position Transfer Request (process step outside software)

Purpose

The HR administrator has received from the current line manager of the employee the request to execute a position transfer for that employee. He or she will start the process of changing the data in the system.

### Entering Position Transfer 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

The HR Administrator enters into the system the position transfer relevant data the line manager has provided. This includes the date of the position transfer, the target line manager's name, and the reason for the transfer.

Procedure

 Caution

In this document, we focus only on the mandatory fields to be filled (they are marked with an asterisk on the screen) and those optional fields which may need to be entered in order to achieve a meaningful employee master data record.

 Recommendation

For a complete list of event reasons relevant for the country where your company is located, you can refer to the HR Transactions workbook appropriate for <YourCountry>.

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on, search and select employee | Log on to Employee Central as an HR Administrator. Search and select an employee as described in theNote at the beginning of chapter Testing the Process Steps. |  |  |  |
| 2 | Select Action to be Performed | Select the Actions button located in the top right corner of the screen and from the value list, which appears, select Change Job and Compensation Info.  Note  Alternatively, you can go to the Employment Information section, scroll there to the Job Information subsection, and choose in the Job Information block the Pencil (Edit) icon. |  | The Change Job and Compensation Info dialog box is displayed.   Note  In case you have chosen to execute the job change directly from the Job Information block, the Job Information dialog box is displayed. You can skip test step # 3 and continue directly with test step # 4. |  |
| 3 | Select Type of **Change Job and Compensation Info** | In the Choose what you want to change block, flag the Job Information check box.  Note  In case the position transfer is accompanied by a change in compensation, flag the Compensation Information check box, too. |  | The When would you like your changes to take effect? field is displayed. |  |
| 4 | Enter Effective Date | Enter effective date of change. | When would you like your changes to take effect?: select using calendar icon | The Event field, and several blocks related to organizational and job information are displayed. |  |
| 5 | Enter Event | Select the event for the change. | Event: select Position Change from drop-down | Once you enter the Event, the Event Reason can be selected. |  |
| 6 | Enter Event Reason | Select the event reason for the change. | Event Reason: select Transfer(POSXFR) from drop-down |  |  |
| 7 | Enter Position Information | In the Position Information block, select the new position the employee is to occupy. | Position: select from drop-down | In the Organizational Information and Job Information blocks of the Change Job and Compensation Info dialog box, following fields are prefilled automatically based on the values maintained for the chosen position object: Company, Business Unit, Division, Department, Location, Cost Center, Supervisor, Job Classification, Job Title, Pay Grade, Regular/Temporary, Standard Weekly Hours, and FTE. Keep all these values unchanged. |  |
| In the Job Information block, select the Show <#> more fields link and make entries as appropriate: | Employee Class: select from drop-down, if not already pre-filled with appropriate value |  |  |
| Employment Type: select from drop-down, if not already pre-filled with appropriate value |  |  |
| Dependent on the country where your company is located, make further adaptions if needed:   * For country **AU**, adapt for example Working Days Per Week, Pay Scale Type, Pay Scale Area, Pay Scale Group, and Pay Scale Level. * For country **US**, adapt for example Working Days Per Week, Pay Scale Type, and Pay Scale Area. | Caution  For country **AU**, depending on the business rules configured for various combinations of changes done to the Job Information, changes to the pay scale group and/or pay scale level can lead to an automatic adaption of the pay component in the Compensation Information: existing pay components might have been adapted, or new components added.  Recommendation  For information related to the preconfigured business rules, refer to the Foundation Objects workbook for **AU** . If required, you can configure additional rules based on your requirements. |  |
| 8 | Enter Additional Information (Optional) | Enter additional data if appropriate. | If the Time Off content has been implemented in your instance, you might consider entering values in the Time Off Information block. |  |  |
| In case the position transfer is accompanied by a change in compensation (meaning you have flagged in test step # 3 the Compensation Information check box, too), you can adapt the values in the Compensation block as appropriate. |  |  |
| 9 | Save Data | Choose the Save pushbutton. |  | The Please confirm your request dialog box displays on the screen. |  |
| 10 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request. |  |  |  |
| 11 | Check Approver(s) | In the dialog box, select the Show workflow participants link to verify the approver(s) of the request. | The approvers in the considered use case are the employee’s current line manager and future line manager. |  |  |
| 12 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed and you return to the employee’s Employment Information section. The message Transfer pending approval (mm/dd/yy) is displayed in both the Job Information and Organizational Information subsections. The workflow has been sent to the next processor.  Note  In case the compensation information is also updated, the message Transfer pending approval (mm/dd/yy) is displayed in the Compensation Information subsection, too. |  |

 Note

In case email is configured and the email address of the employee’s current line manager is maintained in the system, he or she receives an automatic email about the workflow item needing his or her attention.

### Approving Position Transfer 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) | Source Line Manager | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The position transfer request induces a two-step-workflow, where both the source (current) line manager and target (future) line manager of the employee need to approve the change in position before the data becomes active in the system. Until the change is approved by both approvers, the proposed change is pending and the change is displayed in both the Job Information and Organizational Information subsections of the employee’s profile.

In this process step, the Source Line Manager of the employee approves the position transfer request for the employee.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Source Line Manager. | The Home page 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. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the Transfer For <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link 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. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Job and in field Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Transfer For <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the change 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 Position Information, Organizational Information, Job Information and possibly Time Information and Compensation Information sections contain details of the change request. * In the Comment section, you can post your remarks to the change request. * On the right part of the screen a short profile of the employee for whom the change is requested is given, as well as administrative details to the request initiation. |  |
| 4 | Review Change Request Details | Review the details of the change request. | The data for the position change has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, enter a comment if appropriate, and choose the Approvebutton. | The system generates a message about the successful approval of the workflow. The workflow has been sent to the line manager to which area of responsibility the employee is to be transferred. You are directed back to your Home page.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can 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. |  |

 Note

If required, you can also send back the transfer request to the HR administrator for further details. In this case, it is recommended to add a comment explaining your decision. The HR administrator can then either adapt the transfer request and resubmit it for approval, or cancel it.

 Note

In case email is configured and the email address of the employee’s future line manager is maintained in the system, he or she receives an automatic email about the workflow item needing his or her attention.

### Processing Approved Position Transfer 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) | Target Line Manager | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

After the current (source) line manager of the employee has approved the position transfer, this transfer needs to be approved by the future (target) line manager of the employee, too, in order for the changes to take effect in the system. Until the change is approved, the proposed change is pending and the change is displayed in both the Job Information and Organizational Information subsections of the employee.

Note

In case the compensation information has also been updated, the change is displayed in the Compensation Information subsection, too.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Target Line Manager. | The Home page 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. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the Transfer For <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link 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. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Job and in field Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Transfer For <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the change 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 Position Information, Organizational Information, Job Information and possibly Time Information and Compensation Information sections contain details of the change request. * In the Comment section, you can post your remarks to the change request. * On the right part of the screen a short profile of the employee for whom the change is requested is given, as well as administrative details to the workflow activities until now. |  |
| 4 | Review Change Request Details | Review the details of the change request. | The data for the position change has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, enter a comment if appropriate, and choose the Approvebutton. | The system generates a message about the successful approval of the workflow. You are directed back to your Home page.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can 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. |  |

 Note

If required, you can also send back the transfer request to the request initiator (the HR administrator in this case) for further details. In this case, it is recommended to add a comment explaining your decision. The transfer request can then be adapted and resubmitted for approval, or canceled.

Result

After the approval of the target line manager, the position transfer becomes effective on the date as entered in the system. The old position of the employee remains without incumbent the day the employee’s transfer to a new position becomes effective. The employee’s new position is updated automatically accordingly with the employee’s high-level details.

 Caution

**Only in case integration with Employee Central Payroll is in place**, the changed 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).

#### Receiving Notification about Position Transfer Final Approval

Purpose

After the target line manager has approved the position transfer of the employee, the HR administrator receives a notification e-mail about the completion of the position transfer process.

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

### Viewing Updated Positions

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

On the date the position transfer of the employee becomes effective, both the old and the new position are updated accordingly in the position organization chart. The HR Administrator can view if these positions have been updated correctly.

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 | Search New Position | Go to the Position Org Chart tab.  In the Search By field, select value People from the drop-down. In the Search field, enter name or name parts of the employee. Select the appropriate employee from the list of suggested persons.  Click on the calendar icon  located in the top right corner of the screen and select from calendar help the date the employee’s position transfer becomes effective. | The position hierarchy is displayed starting with the position hold by the employee, as well as the direct lower-level positions (if any). |  |
| 4 | Verify Assignment to Position | Verify that the employee is assigned to the correct new position. |  |  |
| 5 | Verify New Supervisor | Choose the Up One Level button immediately above the employee’s new position and verify that the parent position has as incumbent the correct new supervisor (line manager). |  |  |
| 6 | Search Old Position | On the Position Org Chart tab, select in the Search By field value Positions from the drop-down. In the Search field, select the employee’s old position from the drop-down.  Click on the calendar icon located in the top right corner of the screen and select from calendar help the date the employee’s position transfer becomes effective. | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. |  |
| 7 | View Old Position | Verify that the number of incumbents (visible in <current #> / <target #> FTE) has decreased accordingly, for example by 1.   Caution  Note that the old position has no To be hired icon  visible after the employee has left that position. We recommend checking explicitly whether headcount is still available or not for that position. In case headcount is available, adapt the position data manually. For this click on 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>. In the upcoming Position: <Title (Code)> dialog box, select the Edit link, enter an effective date for the change (most likely the first day the position transfer of the previous incumbent becomes effective), choose the Proceed button, and set field To Be Hired to Yes. Then choose Save. |  |  |

### Notifying Source Line Manager about Employee Position Transfer Request Completion (process step outside software)

Purpose

The HR administrator notifies the source line manager about the completion of his or her initial request. This can be done for example via email, or phone call.

### Notifying Employee about Position Transfer Completion (process step outside software)

Purpose

The HR administrator notifies the employee about his or her new organizational details. This can be done for example via email, or phone call.

### Receiving Employee Position Transfer Request Completion Notification (process step outside software)

Purpose

The source line manager has received the notification from the HR administrator that his or her position transfer request has been finalized.

### Receiving Position Transfer Completion Notification (process step outside software)

Purpose

The employee has received the notification from the HR administrator that his or her organizational assignment has changed starting an effective date.

 Recommendation

For country **AU**, in case the position transfer is associated with changes in compensation, meaning that in the Job Information block fields like, for example, pay scale group, pay scale level, FTE, etc., have been adapted, the HR administrator should check if the changes in the employee’s compensation information are displayed as expected! Make sure that in the Compensation Information block, for a particular Pay Component the values of fields Pay Group, Amount, and Frequency fit to each other. If this is not the case, you need to adapt this manually as follows: select the Clock (History) icon next to the Compensation Information block. In the Change History part of the upcoming Compensation Information Changes dialog box, select the appropriate record and choose the Edit button. Adapt the data as appropriate and save the record.

 Note

For country **AU**, in case corrections to the job information of an employee need to be made without going through any approval processes, the HR Administrator can perform these corrections and add a note to the updates performed. For this, the HR Administrator can proceed as follows:

* Log on to Employee Central as an HR Administrator.
* Select from the Home drop-down My Employee Files, enter the employee’s name in the search box, and click in the list of employees matching the search criteria the appropriate employee.
* Go to the Employment Information section and scroll there 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 record and choose the Edit button.
* In the upcoming Edit History of Job Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date>.
* Make the correction as appropriate. In the Notes field, make a note to record the data changes done on the employee. For a correct change tracking, it is recommended that you add to your note also the date on which you made the change.
* Save the correction.
* In case corrections have been performed to fields, which influence the pay components (like, for example, pay scale group, pay scale level, FTE, etc.), you need to check the automatically updated values in the Compensation Information and Compensation blocks. In case the suggested values for Pay Group and (Pay Component) Frequency do not fit to each other, you need to adapt this manually. To do so, select the Clock (History) icon next to the Compensation Information block. In the Change History part of the upcoming Compensation Information Changes dialog box, select the appropriate record and choose the Edit button. In the upcoming Edit History of Compensation Information on <validity start date> dialog box, make sure to adapt the When would you like your changes to take effect? date to the <validity start date> and make the appropriate adaptions. Make sure to adapt also the (Pay Component) Amount in this case such that the annual salary of the employee is preserved.

# Country-Specific Field Values

## Job Information

### United Arab Emirates (AE)

| User Entries: Field Name: User Action and Value |
| --- |
| Job Classification: select from drop-down |
| Job Title: defaulted based on value entered for Job Classification; adapt as appropriate |
| Pay Grade: defaulted based on value for Job Classification; adapt as appropriate by selecting a higher value |

### Australia (AU)

| User Entries: Field Name: User Action and Value |
| --- |
| Standard Weekly Hours: adapt by entering a lower value |
| Working Days Per Week: adapt if appropriate |
| FTE: automatically defaulted based on value entered for Standard Weekly Hours; leave as is |
| Is Fulltime Employee: select No from drop-down |
| Optionally, you can attach a supporting document. For this, select in the Job Information block the Show <#> more fields link. Select the  icon next to field Attachment. In the Choose File to Upload dialog box, browse for the document you want to upload, and then choose Open. |
| If the Time Off content has been implemented in your instance, you need to adapt the information in the Time Off Information block, too. For example, you need to adapt the Work Schedule to fit to the Standard Weekly Hours. |

### China (CN)

| User Entries: Field Name: User Action and Value |
| --- |
| Location: select from drop-down |
| Timezone: defaulted based on value entered in field Location |

### Germany (DE)

| User Entries: Field Name: User Action and Value |
| --- |
| Job Classification: select from drop-down |
| Job Title: defaulted based on value entered for Job Classification; adapt as appropriate |

### France (FR)

| User Entries: Field Name: User Action and Value |
| --- |
| Job Classification: select from drop-down |
| Job Title: defaulted based on value entered for Job Classification; adapt as appropriate |
| Pay Grade: defaulted based on value for Job Classification; adapt as appropriate by selecting a higher value |

### United Kingdom (GB)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Employee Class: adapt as appropriate |  |
| Employment Type: adapt as appropriate |  |
| If the Time Off content has been implemented in your instance: depending on the employee class and employment type selected, you might need to adapt the information in the Time Off Information block. | In case the Time Off content has been deployed with the SAP Best Practices, then, if for example the employment type has changed from salaried to hourly, you need to adapt the time profile to Hourly Profile(GB)and the holiday calendar code to Holiday(GB)Hourly. |

### Kingdom of Saudi Arabia (SA)

| User Entries: Field Name: User Action and Value |
| --- |
| Job Classification: select from drop-down |
| Job Title: defaulted based on value entered for Job Classification; adapt as appropriate |
| Pay Grade: defaulted based on value for Job Classification; adapt as appropriate by selecting a higher value |

### United States (US)

| User Entries: Field Name: User Action and Value |
| --- |
| Job Classification: select from drop-down |
| Job Title: defaulted based on value entered for Job Classification; adapt as appropriate |
| Pay Grade: defaulted based on value for Job Classification; adapt as appropriate by selecting a higher value |































## Compensation Information

### United Arab Emirates (AE)

| User Entries: Field Name: User Action and Value |
| --- |
| Pay Component: select from drop-down, for example AE-Transportation allowance(1070AE) |
| Amount: enter as appropriate |
| Currency: AED is defaulted; leave as is |
| Frequency: Monthly(MON)is defaulted upon entering above mentioned pay component; adapt if appropriate or accept as is |

### Australia (AU)

| User Entries: Field Name: User Action and Value |
| --- |
| Pay Component: select from drop-down, for example AU - Uniform Allowance (1120AU) |
| Amount: pre-populated per default upon entering above mentioned pay component; adapt if appropriate or accept as is |
| Currency: AUD is defaulted; leave as is |
| Frequency: Monthly(MON)is defaulted upon entering above mentioned pay component; adapt if appropriate or accept as is |

### China (CN)

| User Entries: Field Name: User Action and Value |
| --- |
| Pay Component: select from drop-down, for example CN – Housing Accumulation Funds (2060CN) |
| Amount: enter as appropriate |
| Currency: CNY is defaulted; leave as is |
| Frequency: Monthly(MON)is defaulted upon entering above mentioned pay component; adapt if appropriate or accept as is |

### Germany (DE)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Component: select from drop-down if appropriate |  |
| Amount: enter as appropriate; or adapt amount of existing pay component if appropriate | Caution  The amount of the pay components DE – Standard Wage (1000DE), DE – Standard Salary (1100DE) or DE – Business Training Remun. (1300DE), if existing for the employee, should not be changed! |
| Currency: EUR is defaulted; leave as is |  |
| Frequency: defaulted upon entering the pay component; adapt if appropriate or accept as is |  |

### France (FR)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Component: select from drop-down, for example FR-Car Allowance(1100FR) | For the example chosen, make sure to have field Is Eligible For Car, which is located in the Compensation Information block, set to Yes. |
| Amount: enter as appropriate |  |
| Currency: EUR is defaulted; leave as is |  |
| Frequency: Monthly(MON)is defaulted upon entering above mentioned pay component; adapt if appropriate or accept as is |  |

### United Kingdom (GB)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Component: select from drop-down, for example GB-Car Allowance(1100GB) | For the example chosen, make sure to have field Is Eligible For Car, which is located in the Compensation Information block, set to Yes. |
| Amount: enter as appropriate |  |
| Currency: GBP is defaulted; leave as is |  |
| Frequency: Monthly(MON)is defaulted upon entering above mentioned pay component; adapt if appropriate or accept as is |  |

### Kingdom of Saudi Arabia (SA)

| User Entries: Field Name: User Action and Value |
| --- |
| Pay Component: select from drop-down, for example SA-Transportation allowance (2020SA) |
| Amount: enter as appropriate |
| Currency: SAR is defaulted; leave as is |
| Frequency: Monthly(MON)is defaulted upon entering above mentioned pay component; adapt if appropriate or accept as is |

### United States (US)

| User Entries: Field Name: User Action and Value |
| --- |
| Pay Component: select from drop-down if appropriate; for example, US-Uniform allowance(1120US) |
| Amount: enter as appropriate; or adapt amount of existing pay component if appropriate |
| Currency: select USD from drop-down if not already defaulted |
| Frequency: select from drop-down if not already defaulted |

# 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,
* 2nd level managers,
* members of HR Administrator group, and
* members of Payroll Group.

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, job change, pay rate change, job information change, or position transfer).
3. On the Details screen, review the request, and if satisfied, tap Approve.

 Note

If required, you can also send the change request back for further details. In this case, it is recommended to add a comment explaining your decision. Then tap Send Back. The request initiator can then either adapt the change request and resubmit it for approval, or cancel it.

## Process Chains

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

### Preceding Processes

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

| Process | Business Condition |
| --- | --- |
| 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 case, you can continue testing the following business processes:

| Process | Business Condition |
| --- | --- |
| In case the Time Off content has been deployed with the SAP Best Practices: Request and Manage Time Off (FJ7) (Optional) | In case the Time Off content has already been implemented when executing actions, then different situations might occur, like for example:   * if upon a personnel action the value of field FTE has changed, then the vacation / annual leave entitlement of the employee also changes and needs to be adapted manually * if upon a transfer action new time accounts have been generated for the employee, the old time accounts need to be closed manually and the remaining balance needs to be transferred manually, if wanted |
| Integration with SAP SuccessFactors Employee Central Payroll (15O) (Optional) | In case integration with SAP SuccessFactors Employee Central Payroll is in scope, 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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| --- |
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