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| Test Script  SAP SuccessFactors HCM Core  April 2018  English | Customer |
| Take Action: Promotion/Demotion  ID: FJ2 |

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Document History

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

# Purpose

## Purpose of the Document

This document provides a detailed procedure for testing the scope item Take Action: Promotion/Demotion 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 in 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: Promotion/Demotion

This document describes the use of the actions Promotion or Demotion, which can be executed as an event for an employee within an organization. When the employee experiences a promotion or demotion, the job information and/or compensation information of the employee are updated. In the SAP SuccessFactors system, the button ~~Take~~ Actions is used to navigate to the drop-down menu to select Change Job and Compensation Information for employees.

An HR Administrator with the adequate permissions will be able to enter a promotion or a demotion for an employee within an organization. Depending on the configuration, there may be an approval workflow triggered. Within this document, we consider a two-step workflow generated when the event Promotion or Demotion is considered together with the event reason Pay Change.

 Note

This 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, 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

# 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> |
| Standard User | Employee’s HR Business Partner | <Provide Standard User Id and Password for test, if applicable> |

 Note

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

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

## Roles

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

| Business Role | Permission Role | Process Step | Sample Data |
| --- | --- | --- | --- |
| HR Administrator | For testing purposes, only:  SAP BestPractices Super Admin | Refer to chapter Overview Table. | Test user: <userid>; Password: <password> |
| 2nd Level 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 |
| (Employee’s) HR Business Partner   Note  This is the person having Relationship Type HR Manager to the employee; visible in the Job Relationships block of the employee. The Job Relationships block is located in the Employment Information section > Job Relationships subsection. | SAP BestPractices Employee (Self Service for EC) | Refer to chapter Overview Table. | Test user: <userid>;Password: <password>  For testing purpose you can proxy as the role using SAP BestPractices Super Admin role |

## Master Data, Organizational Data, and Other Data

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

## Business Conditions

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

|  | Business Condition | Comment |
| --- | --- | --- |
| 1 | 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). |
| 2 | One administrator user with the complete access to all employee views and fields must exist. | Permission Role SAP BestPractices Super Admin can be used as reference. |

# Overview Table

The scope item Take Action: Promotion/Demotion 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 in the Appendix of this document.

| Process Step | UI Type | Business Condition | Business Role | Transaction Code | Expected Results |
| --- | --- | --- | --- | --- | --- |
| Take Action: Promotion | | | | | |
| Enter Job Information Changes due to Promotion | Employee Central UI | An employee is promoted with changes in job information. | HR Administrator | Company Instance URL | The changes in job information for an employee due to a promotion experienced by the same have been entered into the system. The update is pending upon approval of the workflow. |
| Enter Compensation Information Changes due to Promotion | Employee Central UI | An employee is promoted with changes in compensation information. | HR Administrator | Company Instance URL | The changes in compensation information for an employee due to a promotion experienced by the same has been entered into the system. The update is pending upon approval of the workflow. |
| Approve Promotion Request | Employee Central UI | The generated workflow needs to be processed. | 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 Promotion Request | Employee Central UI | The generated workflow has been approved by the employee’s 2nd level manager and needs a final approval. | HR Business Partner (of the employee) | Company Instance URL or Mobile App | The employee’s HR business partner has approved the workflow and the changes for the employee are effective based on the effective date in the system. |
| Take Action: Demotion | | | | | |
| Enter Job Information Changes due to Demotion | Employee Central UI | An employee is demoted with changes in job information. | HR Administrator | Company Instance URL | The changes in job information for an employee due to a demotion experienced by the same has been entered into the system. The update is pending upon approval of the workflow. |
| Enter Compensation Information Changes due to Demotion | Employee Central UI | An employee is demoted with changes in compensation information. | HR Administrator | Company Instance URL | The changes in compensation information for an employee due to a demotion experienced by the same has been entered into the system. The update is pending upon approval of the workflow. |
| Approve Demotion Request | Employee Central UI | The generated workflow needs to be processed. | 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 Demotion Request | Employee Central UI | The generated workflow has been approved by the employee’s 2nd level manager and needs a final approval. | HR Business Partner (of the employee) | Company Instance URL or Mobile App | The employee’s HR business partner has approved the workflow and the changes for the employee are effective based on the effective date in the system. |

# Testing the Process Steps

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

The test should take around 30 minutes.

 Note

This document is, unless otherwise specified, valid for all countries in scope of this SAP Best Practices, with country-specific details also being described.

The country-specific details are described either in the Procedure tables directly or in the separate chapter Country-specific fields and its subchapters towards the end of the document.

Hyperlinks to chapter Country-specific fields have been added in the Procedure tables within this chapter where applicable. 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 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

The HR Administrator needs to select the employee for whom the action has 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 ~~Take~~ Actions button. In order not to overload the procedure for each process step with details to the searching and selecting of the employee, we describe it once in detail below:

Option 1: via Search box

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR administrator.   Note  In some cases, the employee’s line manager starts the process. In these cases, log in as Line Manager. | The Home page is displayed. |  |
| 2 | Search Employee | In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee. | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | In the search results hover the mouse over the name. | The employee’s business card is displayed.  cid:image002.png@01D2ADF3.C43261A0Note  In case Concurrent Employment Management and/or Global Assignment Management is implemented in your Employee Central instance and the respective employee has a concurrent employment or is on global assignment, you can choose the appropriate employment (primary or secondary) or 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. ~~For further details refer to test script of scope items Manage Concurrent Employment (1Z8) and Manage Global Assignment (1ZA).~~ |  |
| 4 | Select ~~Take~~ Actions Button | In the employee’s business card select the ~~Take~~ Actions drop down menu. | The ~~Take~~ Actions 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: Promotion or Take Action: Demotion 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 in as 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> field the drop-down arrow; in the upcoming Search box enter name parts of the employee and select the appropriate employee. | The Employee Files screen for the employee is displayed.  cid:image002.png@01D2ADF3.C43261A0Note  In case Concurrent Employment Management and/or Global Assignment Management is implemented in your Employee Central instance and the respective employee has a concurrent employment or is on global assignment, you can choose the appropriate employment (primary or secondary) or 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. For further details refer to test script of scope items Manage Concurrent Employment (1Z8) and Manage Global Assignment (1ZA). |  |
| 4 | Select ~~Take~~ Actions Button | Select the ~~Take~~ Actions button located in the top right corner of the Employee Files screen. | The ~~Take~~ Actions button 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: Promotion or Take Action: Demotion within this test script. |  |  |

Prerequisites

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

* The promotion and demotion data need to be approved by the line manager of the employee’s line manager (i.e. 2nd level manager) and the HR business partner of the employee.

Therefore, during hiring of the employee, the field Supervisor (the employee’s line manager) and the Relationship Type HR Manager must have been maintained. Make sure that the employee maintained in field Supervisor has also a line manager.

 Note

For details on these prerequisites, refer to test script of scope item Add New Employee / Rehire (FJ0).

 Recommendation

In case you have missed to maintain the Relationship Type HR Manager, you can add it as briefly described below:

* Log on to Employee Central as HR Administrator.
* Select from the Home drop-down My Employee Files. Select the drop-down next to your name to enter the employee’s name in the search box, and choose in the list of employees matching the search criteria the appropriate employee.
* Go to the Employment Information section, and there scroll down to the Job Relationships subsection.
* Select the Pencil (Edit) icon next to the Job Relationships block.
* In the upcoming Job Relationships dialog box, enter in the When would you like your changes to take effect? field the date the change is to become valid (most likely the hiring date of the employee). Select the ⊕ Add link and make the following entries:
  + For field Relationship Type, select HR Manager from the drop-down, and for field Name, select the appropriate employee from the drop-down.
* To add additional relationship types, which should become effective the same data, select the ⊕ Add link and make entries as appropriate.
* Choose the Save button. The data is saved and is visible in the employee’s Job Relationships subsection of the Employment Information section.

## Take Action: Promotion

### Entering Promotion Data

Purpose

There are several reasons for an employee’s promotion, e.g. a normal career progression, or outstanding performance. This may or may not affect the pay component or pay grade of the employee. The employee’s promotion is reflected in the update of the job information and/or compensation information.

The HR Administrator can maintain the promotion data reflected as change in the employee’s job information or as change in the employee’s compensation information. In the present document, we consider both cases.

In addition, for the combination of event Promotion and event reason Promotion-PayChange a two-step workflow is configured in the system: an approval request will be triggered upon submitting the promotion for an employee.

Dependent on the configuration, also other event reasons may be available for event Promotion for which no workflow is triggered. If needed, the workflow delivered within this SAP Best Practices can be adapted to other event reasons, too, as per your requirement.

 Note

But pay attention to execute **either** process step Entering Job Information Changes due to Promotion **or** process step Entering Compensation Information Changes due to Promotion since it is necessary to perform those steps separately to obtain the desired result.

#### Entering Job Information Changes due to Promotion

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 job information changes into the system for an employee, who experiences a promotion.

Procedure

Note

In case Position Management is implemented in your Employee Central instance, in the Organizational Information subsection an additional block, Position Information, is displayed, containing following editable fields: Position and Position Entry Date.

In case Position Management has been deployed with the SAP Best Practices, validate if the rule for Synchronization of JobInfo to Position Object is as per your business process common for your company. For example, in case of promotion with pay grade change, you could consider assigning the employee to another position, instead of changing the Pay Grade field in Job Information block without changing the position.

 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 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 | From the ~~Take~~ Actions drop down menu, select Change Job and Compensation Info. |  | The Change Job and Compensation Info screen 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 ~~You May Also Change~~ 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 from calendar help | 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 Promotion 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 Promotion - PayChange(PROPWP) from drop-down | The Job Information Change event reasons depend on what is configured in your system. |  |
| 7 | Enter Job Information | Make changes in the Job Information block as appropriate.   Note  This information is country-specific.   Note  After entering the new values, the old values are displayed crossed out. | Enter data as required in the country where your company is located.   Caution  For a detailed list refer to chapter [Country-Specific Fields 🡪 Job Information](#_Job_Information). |  |  |
| 8 | Save Data | Choose the Save button. |  | A workflow is triggered. 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 Approvers | In the dialog box, select the Show workflow participants link to verify the approvers of the request. |  | The 2nd level manager and the HR business partner of the employee are shown as approvers. |  |
| 11 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed. In the employee’s Job Information block the message Promotion – Pay Change pending approval (mm/dd/yy) is displayed. The workflow has been sent to the next processor.  Continue with process step 4.1.2 Approving Promotion Request and subsequent   Note  In case the change in job information leads to an update of the compensation information, too, the message Promotion – Pay Change pending approval (mm/dd/yy) is displayed also in the Compensation Information block. |  |

Note

If appropriate, you can also change the value of field FTE and related fields. Based on the business rule delivered within this SAP Best Practices, a change of FTE value leads to an automatic adaption of the pay component in the Compensation Information block. For information related to the preconfigured business rules, refer to the configuration guide of building block **15T**, where in chapter Preparation / Prerequisites the reference to the appropriate Pay Structure workbook is given. If required, you can configure additional rules based on your requirements.

In this situation, upon confirming the workflow request (test step # 11 in above Procedure table), the message Promotion – Pay Change pending approval (mm/dd/yy) is displayed also in the Compensation Information block.

 Note

In order that the employee’s 2nd level manager receives an automatic email about the workflow item, email needs to be configured in the system and the email address of the employee’s 2nd level manager has been maintained in his or her contact information.

#### Entering Compensation Information Changes due to Promotion

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 compensation information changes into the system for an employee, who experiences a promotion.

Procedure

 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 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 | From the ~~Take~~ Actions drop down menu and from the value list select Change Job and Compensation Info. |  | The *Change Job and Compensation Info* screen is displayed.  cid:image034.png@01D2E412.524280C0 Note  In case you have chosen to execute the compensation information 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 ~~You May Also Change~~ 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 from calendar help | The Event field, and several blocks related to compensation information are displayed. |  |
| 5 | Enter Event | Select the event for the change. | Event: select Promotion 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 Promotion - PayChange(PROPWP) from drop-down | The Compensation Information Change event reasons depend on what is configured in your system. |  |
| 7 | Enter Compensation Information | Make changes In the Compensation Information block as appropriate.   Note  This information is country-specific.   Note  After entering the new values, the old values are displayed crossed out. | Enter data as required in the country where your company is located.   Caution  For a detailed list refer to chapter [Country-Specific Fields 🡪 Compensation Information](#_Compensation_Information). |  |  |
| 8 | Save Data | Choose the Save button. |  | A workflow is triggered. 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 Approvers | In the dialog box, select the Show Workflow Participants link to verify the approvers of the request. |  | The 2nd level manager and the HR business partner of the employee are shown as approvers. |  |
| 11 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed. In the employee’s Compensation Information block the message Promotion – Pay Change pending approval (mm/dd/yy) is displayed. The workflow has been sent to the next processor.  Continue with process step 4.1.2 Approving Promotion Request and subsequent. |  |

 Note

In order that the employee’s 2nd level manager receives an automatic email about the workflow item, email needs to be configured in the system and the email address of the employee’s 2nd level manager has been maintained in his or her contact information.

### Approving Promotion 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

~~If a workflow is configured in the system for a promotion, the approver(s) (i.e. employee’s 2~~~~nd~~ ~~level manager and employee’s HR business partner) will need to approve the data change 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 the Job Information and/or Compensation Information block of the employee.~~

~~In this process step, the 2~~~~nd~~ ~~level manager will need to process the workflow by selecting the change request, reviewing the changes for the employee and then lastly approving the request.~~

~~ Note~~

~~The employee’s 2~~~~nd~~ ~~level manager is the line manager of the employee’s line manager.~~

~~This is a two-step-workflow, where both the employee’s 2~~~~nd~~ ~~level manager and the employee’s HR business partner need to approve the job or compensation changes due to a promotion before the data becomes active in the system.~~

The 2nd Level Manager of the employee approves the promotion 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 the Job Information and /or Compensation Information subsections of the employee’s profile.

 Note

The employee’s 2nd 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 2nd level manager. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to the To Do section and choose the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all 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, choose the <Promotion – Pay Change 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, choose 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 Event Reason value Promotion – Pay Change and in Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case there are several requests of this type, you can also sort them, for example based on the date you received them. 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, choose 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 into several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * Depending which data has to be changed as result of the promotion, the Job Information and/or Compensation Information section is shown with the following information: * In case job information data has changed, these changes can be found in section Job Information. Additionally, depending on the business rules configured, section Compensation Information might also be shown, where the pay component has been adapted according to the chosen pay scale group and/or pay scale level. * In case compensation information data has changed, only the section Compensation Information is shown, where the changes can be found.    Note  In case the Compensation Information section is visible, it may contain changes in existing pay component(s). These amount(s) need to be changed back manually to the value the pay components had in the preceding record(s).  For details, refer to the  Caution section at the end of this process step.   * 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 Changed Information | Review the details in the Job Information and/or Compensation Information section. | The data for the promotion has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approve button to approve the promotion data. | 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

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

Cases might exist for which no rule for indirect valuation of the pay component has been configured upon changes performed to the pay scale group and/or pay scale level in the Job Information section. In this case, the existing pay components might have been deleted upon the change in job information and in the Compensation Information section you see the values strikethrough. In this case, you might inform the HR administrator that he/she needs to adapt the compensation information manually after the approval process is finished.

 Note

In order that the employee’s HR Business Partner receives an automatic email about the workflow item, email needs to be configured in the system and the email address of the employee’s HR Business Partner has been maintained in his or her contact information.

### Processing Approved Promotion Request

Test Administration

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

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

Purpose

After the employee’s 2nd level manager has approved the promotion data, the data change for the employee needs to be processed by the employee’s HR Business Partner, too. In particular, he or she 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 Job Information and/or Compensation Information block for the employee.

~~In this process step, the HR Business Partner of the employee will complete the workflow by selecting the change request, reviewing the changes for the employee and then lastly approving the request.~~

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR Business Partner. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to the To Do section and choose the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all 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, choose the <Promotion – Pay Change 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, choose 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 Event Reason value Promotion – Pay Change and in Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case there are several requests of this type, you can also sort them, for example based on the date you received them. 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, choose 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 which data has to be changed as result of the promotion, the Job Information and/or the Compensation Information section is shown with the following information: * In case job information data has changed, these changes can be found in section Job Information. Additionally, depending on the business rules configured, section Compensation Information might also be shown, where the pay component has been adapted according to the chosen pay scale group and/or pay scale level. * In case compensation information data has changed, only the section Compensation Information is shown, where the changes can be found.    Note  In case the Compensation Information section is visible, it may contain changes in existing pay component(s). These amount(s) need to be changed back manually to the value the pay components had in the preceding record(s).  For details, refer to the  Caution section at the end of this process step.   * 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 Changed Information | Review the details in the Job Information and/or Compensation Information section. | The data for the promotion has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approve button to approve the promotion data. | 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 and/or compensation information due to the promotion becomes effective the date as entered in the system. |  |

 Note

If required, you can also send the change request back 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 HR administrator can then either adapt the change request and resubmit it for approval, or cancel it.

 Recommendation

The HR administrator should check if the changes in the employee’s job and/or compensation information are displayed as expected.

For this, he or she can check the Job Information block and/or Compensation Information block of the employee’s Employee Files. In case the changes are effective on a future date, select the Pending future change in Job Information (mm/dd/yy) link and/or the Pending future change in Compensation Information (mm/dd/yy) link to view the changes.

Dependent if job information changes or compensation information changes have been performed due to the promotion, following situations need to be considered, for which the HR administrator should check the data:

* Situation 1: In case Job Information changes have been entered due to a promotion, check both the Job Information block and Compensation Information block:
  + Depending on the business rules configured for various combinations of changes done to the Job Info, changes to the pay scale group and/or pay scale level can lead to an automatic adaption of the pay component in the Compensation Info: existing pay components might have been adapted, or new components added. Check in the Compensation Information block if the changes are shown as expected. In case the suggested values for Pay Group and (Pay Component) Frequency do not fit to each other, you need to adapt this manually via Take Action → Make Correction. Make sure to adapt also the (Pay Component) Amount in this case such that the annual salary of the employee is preserved.
  + Cases might exist for which no rule for indirect valuation of the pay component has been configured upon changes performed to the pay scale group and/or pay scale level in the Job Info. In this case, the existing pay components might have been deleted upon the change in job information and the HR administrator needs to adapt the compensation information manually. The procedure for doing this is as follows:
  + On the My Employee File → <employee name> → Employment Informationscreen choose the Clock (History) icon in the Compensation Information block.
  + In the upcoming History of Compensation Information screen select in the History block on the left side the appropriate record (Promotion - Pay Change) and choose Edit.
  + Select the pay component(s) as appropriate, enter the data as appropriate, and choose the Save button.

 Note

Refer to the configuration guide of building block 15T, where in chapter Preparation / Prerequisites the reference to the appropriate Pay Structure workbook is given, to see which pay component is relevant for the pay scale group and pay scale level chosen in the job information. Check in the appropriate workbook sheet also the amount and frequency valid for the pay scale level and maintain it for the pay component.

* Situation 2: In case Compensation Information changes have been entered due to a promotion, check in the Compensation Information block if the changes are shown.

 Note

In case corrections to the job information of an employee need to be made without going through any approval processes, the HR administrator can do so as follows:

* Log on to Employee Central as HR Administrator.
* Select from the Home drop-down My Employee Files, enter the employee’s name in the search box, and choose in the list of employees matching the search criteria the appropriate employee.
* Select from the Profile drop-down Employment Information.
* In the Job Information block choose the Clock (History) icon. Select the appropriate record in the Change History block on the left of the screen and choose Edit.
* Make the correction as appropriate, for example adapt the (Local) Job Title. 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.

 Caution

**In case integration with Employee Central** **Payroll is in place**, the promotion 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).

 Caution

This caution is only relevant for the following countries: SA, AE, GB and DE.

During hiring or rehiring of the employee, a country-specific Pay Component ~~SA - Basic Pay(1000SA)~~ has been generated automatically 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 this defaulted amount. Also, during hiring or rehiring, HR Administrator might have added a Pay Component related to recurring payments. In addition, the employee might have experienced a possible job change, in which recurring payments have been adapted, too.

Due to the Job Information Changes performed in this Promotion process, the preconfigured business rule will re-generate again automatically the same predefined (initial) amount for the country-specific Pay Component ~~SA - Basic Pay(1000SA)~~ like during hiring or rehiring of the employee. Also, additional recurring pay components maintained might disappear.

In this case, the HR Administrator needs to manually change back this Pay Component ~~SA - Basic Pay(1000SA),~~ and possibly add missing recurring payments in that way that the correct compensation information for the employee is obtained. For this, the HR Administrator can proceed as follows:

* Log on to *Employee Central* as 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 Promotion) 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.

## Take Action: Demotion

### Entering Demotion Data

Purpose

The reasons for an employee’s demotion can be due to lacking performance, lacking qualifications or for other reasons. This may or may not affect the pay component or pay grade of the employee. The employee’s demotion is reflected in the update of the job information or compensation information.

The HR Administrator can maintain the demotion data reflected as change in the employee’s job information or as change in the employee’s compensation information. In the present document, we consider both cases.

In addition, for the combination of event Demotion and event reason Demotion-PayChange a two-step workflow is configured in the system: an approval request will be triggered upon submitting the demotion for an employee.

Dependent on the configuration, also other event reasons may be available for event Demotion for which no workflow is triggered. If needed, the workflow delivered within this SAP Best Practices can be adapted to other event reasons, too, as per your requirement.

 Note

But pay attention to execute either process step Entering Job Information Changes due to Demotion or process step Entering Compensation Information Changes due to Demotion since it is necessary to perform those steps separately to obtain the desired result.

#### Entering Job Information Changes due to Demotion

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 job information changes into the system for an employee, since a demotion will take place due to unsatisfactory performance, lack of skills or other reasons.

Procedure

Note

In case Position Management is implemented in your Employee Central instance, in the Organizational Information subsection an additional block, Position Information, is displayed, containing following editable fields: Position and Position Entry Date.

Validate if the rule for Synchronization of JobInfo to Position Object is as per your business process common for your company. For example, in case of demotion with pay grade change, you could consider assigning the employee to another position, instead of changing the Pay Grade field in Job Information block without changing the position.

 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 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 | From the ~~Take~~ Actions drop down menu, select Change Job and Compensation Info. |  | The *Change Job and Compensation Info* screen 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 ~~You May Also Change~~ 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 from calendar help | 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 Demotion 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 Demotion – Pay Change (DEMORPAY) from drop-down | The Job Information Change event reasons depend on what is configured in your system. |  |
| 7 | Enter Job Information | Make changes in the Job Information block as appropriate.   Note  This information is country-specific.   Note  After entering the new values, the old values are displayed crossed out. | Enter data as required in the country where your company is located.   Caution  For a detailed list refer to chapter [Country-Specific Fields 🡪 Job Information](#_Job_Information). |  |  |
| 8 | Save Data | Choose the Save button. |  | A workflow is triggered. 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 Approvers | In the dialog box, select the Show workflow participants link to verify the approvers of the request. |  | The 2nd level manager and the HR business partner of the employee are shown as approvers. |  |
| 11 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed. In the employee’s Job Information block the message Demotion – Pay Change pending approval (mm/dd/yy) is displayed. The workflow has been sent to the next processor.  Continue with process step 4.2.2 Approving Demotion Request and subsequent.   Note  In case the change in job information leads to an update of the compensation information, too, the message Demotion – Pay Change pending approval (mm/dd/yy) is displayed also in the Compensation Information block. |  |

Note

If appropriate, you can also change the value of field FTE and related fields. Based on the business rule delivered within this SAP Best Practices, a change of FTE value leads to an automatic adaption of the pay component in the Compensation Information block. For information related to the preconfigured business rules, refer to the configuration guide of building block **15T**, where in chapter Preparation / Prerequisites the reference to the appropriate Pay Structure workbook is given. If required, you can configure additional rules based on your requirements.

In this situation, upon confirming the workflow request (test step # 11 in above Procedure table), the message Demotion – Pay Change pending approval (mm/dd/yy) is displayed also in the Compensation Information block.

 Note

In order that the employee’s 2nd level manager receives an automatic email about the workflow item, email needs to be configured in the system and the email address of the employee’s 2nd level manager has been maintained in his or her contact information.

#### Entering Compensation Information Changes due to Demotion

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 compensation information changes into the system for an employee, since a demotion will take place due to unsatisfactory performance, lack of skills or other reasons.

Procedure

 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 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 | From the ~~Take~~ Actions drop down menu and from the value list select Change Job and Compensation Info. |  | The *Change Job and Compensation Info* screen is displayed.  cid:image034.png@01D2E412.524280C0 Note  In case you have chosen to execute the compensation information 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 ~~You May Also Change~~ 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 from calendar help | The Event field, and several blocks related to compensation information are displayed. |  |
| 5 | Enter Event | Select the event for the change. | Event: select Demotion 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 Demotion– Pay Change (DEMORPAY) from drop-down | The Compensation Information Change event reasons depend on what is configured in your system. |  |
| 7 | Enter Compensation Information | Make changes in the Compensation Information block as appropriate.   Note  This information is country-specific.   Note  After entering the new values, the old values are displayed crossed out. | Enter data as required in the country where your company is located.   Caution  For a detailed list refer to chapter  [Country-Specific Fields 🡪 Compensation Information](#_Compensation_Information). |  |  |
| 8 | Save Data | Choose the Save button. |  | A workflow is triggered. 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 Approvers | In the dialog box, select the Show Workflow Participants link to verify the approvers of the request. |  | The 2nd level manager and the HR business partner of the employee are shown as approvers. |  |
| 11 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed.In the employee’s Compensation Information block the message Demotion – Pay Change pending approval (mm/dd/yy) is displayed. The workflow has been sent to the next processor.  Continue with process step 4.2.2 Approving Demotion Request and subsequent. |  |

 Note

In order that the employee’s 2nd level manager receives an automatic email about the workflow item, email needs to be configured in the system and the email address of the employee’s 2nd level manager has been maintained in his or her contact information.

### Approving Demotion 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

If a workflow is configured in the system for a demotion, the approver(s) (i.e. employee’s 2nd level manager and employee’s HR business partner) will need to approve the data change 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 the Job Information and/or Compensation Information block of the employee.

In this process step, the 2nd level manager will need to process the workflow by selecting the change request, reviewing the changes for the employee and then lastly approving the request.

 Note

The employee’s 2nd level manager is the line manager of the employee’s line manager.

This is a two-step-workflow, where both the employee’s 2nd level manager and the employee’s HR business partner need to approve the job or compensation changes due to a demotion before the data becomes active in the system.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as 2nd level manager. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to the To Do section and choose the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all 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, choose the < Demotion – Pay Change 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, choose 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 Event Reason value Demotion – Pay Change and in Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case there are several requests of this type, you can also sort them, for example based on the date you received them. 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, choose 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 which data has to be changed as result of the demotion, the Job Information and/or Compensation Information section is shown with the following information: * In case job information data has changed, these changes can be found in section Job Information. Additionally, depending on the business rules configured, section Compensation Information might also be shown, where the pay component has been adapted according to the chosen pay scale group and/or pay scale level. * In case compensation information data has changed, only the section Compensation Information is shown, where the changes can be found.    Note  In case the Compensation Information section is visible, it may contain changes in existing pay component(s). These amount(s) need to be changed back manually to the value the pay components had in the preceding record(s).  For details, refer to the  Caution section at the end of this process step.   * 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 Changed Information | Review the details in the Job Information and/or Compensation Information section. | The data for the demotion has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approve button to approve the demotion data. | 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

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

Cases might exist for which no rule for indirect valuation of the pay component has been configured upon changes performed to the pay scale group and/or pay scale level in the Job Information section. In this case, the existing pay components might have been deleted upon the change in job information and in the Compensation Information section you see the values strikethrough. In this case, you might inform the HR administrator that he/she needs to adapt the compensation information manually after the approval process is finished.

 Note

In order that the employee’s 2nd HR Business Partner receives an automatic email about the workflow item, email needs to be configured in the system and the email address of the employee’s HR Business Partner has been maintained in his or her contact information.

### Processing Approved Demotion Request

Test Administration

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

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

Purpose

After the employee’s 2nd level manager has approved the demotion data, the data change for the employee needs to be processed by the employee’s HR Business Partner , too. In particular, he or she 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 Job Information and/or Compensation Information block for the employee.

In this process step, the HR Business Partner of the employee will complete the workflow by selecting the change request, reviewing the changes for the employee and then lastly approving the request.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR Business Partner. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to the To Do section and choose the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all 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, choose the < Demotion – Pay Change 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, choose 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 Event Reason value Demotion – Pay Change and in Requested For the name of the employee for whom the change has been requested. Then choose the Go button. In case there are several requests of this type, you can also sort them, for example based on the date you received them. 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, choose 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 which data has to be changed as result of the demotion, the Job Information and/or the Compensation Information section is shown with the following information: * In case job information data has changed, these changes can be found in section Job Information. Additionally, depending on the business rules configured, section Compensation Information might also be shown, where the pay component has been adapted according to the chosen pay scale group and/or pay scale level. * In case compensation information data has changed, only the section Compensation Information is shown, where the changes can be found.    Note  In case the Compensation Information section is visible, it may contain changes in existing pay component(s). These amount(s) need to be changed back manually to the value the pay components had in the preceding record(s).  For details, refer to the  Caution section at the end of this process step.   * 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 Changed Information | Review the details in the Job Information and/or Compensation Information section. | The data for the demotion has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approve button to approve the demotion data. | 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 and/or compensation information due to the demotion becomes effective the date as entered in the system. |  |

 Note

If required, you can also send the change request back 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 HR administrator can then either adapt the change request and resubmit it for approval, or cancel it

 Recommendation

The HR administrator should check if the changes in the employee’s job and/or compensation information are displayed as expected!

For this, he or she can check the Job Information block and/or Compensation Information block of the employee’s Employee Files. In case the changes are effective on a future date, select the Pending future change in Job Information (mm/dd/yy) link and/or the Pending future change in Compensation Information (mm/dd/yy) link to view the changes.

Dependent if job information changes or compensation information changes have been performed due to the demotion, following situations need to be considered, for which the HR administrator should check the data:

* Situation 1: In case Job Information changes have been entered due to a demotion, check both the Job Information block and Compensation Information block:
  + Depending on the business rules configured for various combinations of changes done to the Job Info, changes to the pay scale group and/or pay scale level can lead to an automatic adaption of the pay component in the Compensation Info: existing pay components might have been adapted, or new components added. Check in the Compensation Information block if the changes are shown as expected. In case the suggested values for Pay Group and (Pay Component) Frequency do not fit to each other, you need to adapt this manually via Take Action → Make Correction. Make sure to adapt also the (Pay Component) Amount in this case such that the annual salary of the employee is preserved.
* Cases might exist for which no rule for indirect valuation of the pay component has been configured upon changes performed to the pay scale group and/or pay scale level in the Job Info. In this case, the existing pay components might have been deleted upon the change in job information and the HR administrator needs to adapt the compensation information manually. The procedure for doing this is as follows:
  + On the My Employee File → <employee name> → Employment Informationscreen choose the Clock (History) icon in the Compensation Information block.
  + In the upcoming History of Compensation Information screen select in the Change History block on the left side the appropriate record (Demotion - Pay Change) and choose Edit.
  + Select the pay component(s) as appropriate, enter the data as appropriate, and choose the Save button.

 Note

Refer to the configuration guide of building block 15T, where in chapter Preparation / Prerequisites the reference to the appropriate Pay Structure workbook is given, to see which pay component is relevant for the pay scale group and pay scale level chosen in the job information. Check in the appropriate workbook sheet also the amount and frequency valid for the pay scale level and maintain it for the pay component.

* Situation 2: In case Compensation Information changes have been entered due to a demotion, check in the Compensation Information block if the changes are shown.

 Note

In case corrections to the job information of an employee need to be made without going through any approval processes, the HR administrator can do so as follows:

* Log on to Employee Central as HR Administrator.
* Select from the Home drop-down My Employee Files, enter the employee’s name in the search box, and choose in the list of employees matching the search criteria the appropriate employee.
* Select from the Profile drop-down Employment Information.
* In the Job Information block choose the Clock (History) icon. Select the appropriate record in the History block on the left of the screen and choose Edit.
* Make the correction as appropriate, for example adapt the (Local) Job Title. 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.

 Caution

**In case integration with Employee Central** **Payroll is in place**, the demotion 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).

 Caution

This caution is only relevant for the following countries: SA, AE, GB and DE.

During hiring or rehiring of the employee, a country-specific Pay Component ~~SA - Basic Pay(1000SA)~~ has been generated automatically 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 this defaulted amount. Also, during hiring or rehiring, HR Administrator might have added a Pay Component related to recurring payments. In addition, the employee might have experienced a possible job change, in which recurring payments have been adapted, too.

Due to the Job Information Changes performed in this Demotion process, the preconfigured business rule will re-generate again automatically the same predefined (initial) amount for the country-specific Pay Component ~~SA - Basic Pay(1000SA)~~ like during hiring or rehiring of the employee. Also, additional recurring pay components maintained might disappear.

In this case, the HR Administrator needs to manually change back this Pay Component ~~SA - Basic Pay(1000SA),~~ and possibly add missing recurring payments in that way that the correct compensation information for the employee is obtained. For this, the HR Administrator can proceed as follows:

* Log on to *Employee Central* as 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 Demotion) 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.

# Country-Specific Fields

## Job Information

### United Arab Emirates (AE)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Position | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Position Entry Date | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Pay Grade: select from drop down a higher/lower grade |  |
| FTE: adapt if appropriate | A change of the FTE value to e.g. 0.5 leads to an automatic adaption of the pay component in the Compensation Information block. |
| for additional fields, select the Show <xx> more fields button |  |
| Attachment: use drag and drop or the + button. | Optionally, you can attach a supporting document on the pay grade change |

### Australia (AU)

| User Entries: Field Name: User Action and Value |  |
| --- | --- |
| Position | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Position Entry Date | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Pay Grade: select from drop down a higher/lower grade |  |
| FTE: adapt if appropriate | A change of the FTE value to e.g. 0.5 leads to an automatic adaption of the pay component in the Compensation Information block. |
| for additional fields, select the Show <xx> more fields button |  |
| Attachment: use drag and drop or the + button. | Optionally, you can attach a supporting document on the pay grade change |

### China (CN)

| User Entries: Field Name: User Action and Value |  |
| --- | --- |
| Position | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Position Entry Date | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Pay Grade: select from drop down a higher/lower grade |  |
| FTE: adapt if appropriate | A change of the FTE value to e.g. 0.5 leads to an automatic adaption of the pay component in the Compensation Information block. |
| for additional fields, select the Show <xx> more fields button |  |
| Attachment: use drag and drop or the + button. | Optionally, you can attach a supporting document on the pay grade change |

### Germany (DE)

| User Entries: Field Name: User Action and Value |  |
| --- | --- |
| Position | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Position Entry Date | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Pay Grade: select from drop down a higher/lower grade |  |
| FTE: adapt if appropriate | A change of the FTE value to e.g. 0.5 leads to an automatic adaption of the pay component in the Compensation Information block. |
| for additional fields, select the Show <xx> more fields button |  |
| Attachment: use drag and drop or the + button. | Optionally, you can attach a supporting document on the pay grade change |

### France (FR)

Note

In this document we assume that during hiring/rehiring of the employee pay scale type National Collective Agreement for the Personnel of Engineering Design Offices, Consulting Engineers (FRA/1486) and pay scale area Île-de-France (FRA/11) have been selected.

In case this combination of pay scale type and pay scale area is used, changes to pay scale group and pay scale level lead to an automatic adaption of the pay component in the compensation information.

For details refer to test script of scope item Add New Employee / Rehire (FJ0).

Note

In general, pay scale groups and pay scale levels should be available for each combination of pay scale type and pay scale area. Within this SAP Best Practices, only one combination of pay scale type and pay scale area is considered, for which values of pay scale group and pay scale level have been defined. For the other pay scale types and pay scale areas delivered in the SAP Best Practices, pay scale groups and levels can be defined in a similar way.

Recommendation

For details to pay scale group and pay scale level values defined for the combination of pay scale type National Collective Agreement for the Personnel of Engineering Design Offices, Consulting Engineers (FRA/1486) and pay scale area Île-de-France (FRA/11) refer to the Pay Structure workbook for **FR**.

| User Entries: Field Name: User Action and Value |  |
| --- | --- |
| Position | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Position Entry Date | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| FTE: adapt if appropriate | A change of the FTE value to e.g. 0.5 leads to an automatic adaption of the pay component in the Compensation Information block. |
| Pay Grade: select from drop down a higher/lower grade |  |
| Pay Scale Type: select from drop down National Collective Agreement for the Personnel of Engineering Design Offices, Consulting Engineers (FRA/1486) in case it has not already been selected during hiring/rehiring of the employee |  |
| Pay Scale Area: Pay Scale Area: select from drop down Île-de-France (FRA/11) in case it has not already been selected during hiring/rehiring of the employee.   Recommendation  Required if integration with Employee Central Payroll is in place. |
| for additional fields, select the Show <xx> more fields button |  |
| Pay Scale Group: select from drop down for example IC(FRA/11/1486/IC) (employee is a manager), or ETAM(FRA/11/1486/ETAM) (employee is a non-manager) in case it has not already been selected during hiring/rehiring of the employee | Depending on the business rules configured for various combinations of changes done to the Job Info, changes to the pay scale group and/or pay scale level can lead to an automatic adaption of the pay component in the Compensation Info: existing pay components might have been adapted, or new components added.   Recommendation  For information related to the preconfigured business rules, refer to the Pay Structure workbook for **FR**. If required, you can configure additional rules based on your requirements. |
| Pay Scale Level: select from drop down a higher grade, for example Position 3.3 (FRA/11/1486/ETAM/3.3) |
| FTE: adapt if appropriate | A change of the FTE value to e.g. 0.5 leads to an automatic adaption of the pay component in the Compensation Information block. |
| Attachment: use drag and drop or the + button. | Optionally, you can attach a supporting document on the pay grade change |

### United Kingdom (GB)

| User Entries: Field Name: User Action and Value |  |
| --- | --- |
| Position | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Position Entry Date | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Pay Grade: select from drop down a higher/lower grade |  |
| FTE: adapt if appropriate | A change of the FTE value to e.g. 0.5 leads to an automatic adaption of the pay component in the Compensation Information block. |
| for additional fields, select the Show <xx> more fields button |  |
| Attachment: use drag and drop or the + button. | Optionally, you can attach a supporting document on the pay grade change |

### Kingdom of Saudi Arabia (SA)

| User Entries: Field Name: User Action and Value |  |
| --- | --- |
| Position | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Position Entry Date | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Pay Grade: select from drop down a higher/lower grade |  |
| FTE: adapt if appropriate | A change of the FTE value to e.g. 0.5 leads to an automatic adaption of the pay component in the Compensation Information block. |
| for additional fields, select the Show <xx> more fields button |  |
| Attachment: use drag and drop or the + button. | Optionally, you can attach a supporting document on the pay grade change |

### United States (US)



| User Entries: Field Name: User Action and Value |  |
| --- | --- |
| Position | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Position Entry Date | This field should be maintained in case Position Management is implemented in your Employee Central instance. |
| Pay Grade: select from drop down a higher/lower grade |  |
| FTE: adapt if appropriate | A change of the FTE value to e.g. 0.5 leads to an automatic adaption of the pay component in the Compensation Information block. |
| for additional fields, select the Show <xx> more fields button |  |
| Attachment: use drag and drop or the + button. | Optionally, you can attach a supporting document on the pay grade change |

## Compensation Information

### United Arab Emirates (AE)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Group: AE – Monthly (AE) |  |
| Pay Component: AE – Basic Salary (1000AE) |  |
| Amount (of existing pay component): adapt as appropriate, for example by entering a higher/lower amount | You may use the  Change Calculator to adapt the Total Amount by calculating with a positive/negative percentage or a positive/negative amount. Choose Save to save the new amount. |
| Currency: leave as is, AED |  |
| Frequency: calculated based on value of field Pay Group, leave as is, Monthly(MON) |  |
| new Pay Component: for example AE - Monthly housing (1010AE) | If appropriate, add a new or adapt an existing Pay Component related to recurring payments. In case a suggested amount occurs, you may enter a higher/lower amount. |

### Australia (AU)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Group: AU – Monthly (AM) |  |
| Pay Component: AU – Standard Salary (1100AU) |  |
| Amount (of existing pay component): adapt as appropriate, for example by entering a higher/lower amount | You may use the  Change Calculator to adapt the Total Amount by calculating with a positive/negative percentage or a positive/negative amount. Choose Save to save the new amount. |
| Currency: leave as is, AUD |  |
| Frequency: calculated based on value of field Pay Group leave as is, Monthly(MON) |  |
| new Pay Component: for example AU - Uniform Allowance(1120AU). | If appropriate, add a new or adapt an existing Pay Component related to recurring payments. In case a suggested amount occurs, you may enter a higher/lower amount. |

### China (CN)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Group: CN – Monthly (CN) |  |
| Pay Component: CN – Monthly Salary (1000CN) |  |
| Amount (of existing pay component): adapt as appropriate, for example by entering a higher/lower amount | You may use the  Change Calculator to adapt the Total Amount by calculating with a positive/negative percentage or a positive/negative amount. Choose Save to save the new amount. |
| Currency: leave as is, CNY |  |
| Frequency: calculated based on value of field Pay Group leave as is, Monthly(MON) |  |
| new Pay Component: for example CN - Car Allowance (1100CN) | If appropriate, add a new or adapt an existing Pay Component related to recurring payments. In case a suggested amount occurs, you may enter a higher/lower amount. |

### Germany (DE)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Group: DE – Monthly (D1) |  |
| Pay Component: DE – Standard Salary (1100DE) |  |
| Amount (of existing pay component): adapt as appropriate, for example by entering a higher/lower amount | You may use the  Change Calculator to adapt the Total Amount by calculating with a positive/negative percentage or a positive/negative amount. Choose Save to save the new amount. |
| Currency: leave as is, EUR |  |
| Frequency: calculated based on value of field Pay Group leave as is, Monthly(MON) |  |
| new Pay Component: for example DE – Voluntary Supplement(1110DE) | If appropriate, add a new or adapt an existing Pay Component related to recurring payments. In case a suggested amount occurs, you may enter a higher/lower amount. |

### France (FR)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Group: FR – Monthly (FR) |  |
| Pay Component: FR – Monthly Salary (1000FR) |  |
| Amount (of existing pay component): adapt as appropriate, for example by entering a higher/lower amount | You may use the  Change Calculator to adapt the Total Amount by calculating with a positive/negative percentage or a positive/negative amount. Choose Save to save the new amount. |
| Currency: leave as is, EUR |  |
| Frequency: calculated based on value of field Pay Group leave as is, Monthly(MON) |  |
| new Pay Component: for example FR - Car Allowance(1100FR) | If appropriate, add a new or adapt an existing Pay Component related to recurring payments. In case a suggested amount occurs, you may enter a higher/lower amount. |

### United Kingdom (GB)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Group: GB – Monthly (GM) |  |
| Pay Component: GB – Monthly Salary (1000GB) |  |
| Amount (of existing pay component): adapt as appropriate, for example by entering a higher/lower amount | You may use the  Change Calculator to adapt the Total Amount by calculating with a positive/negative percentage or a positive/negative amount. Choose Save to save the new amount. |
| Currency: leave as is, GBP |  |
| Frequency: calculated based on value of field Pay Group leave as is, Monthly(MON) |  |
| new Pay Component: for example GB – Monthly Bonus%(1120GB) | If appropriate, add a new or adapt an existing Pay Component related to recurring payments. In case a suggested amount occurs, you may enter a higher/lower amount. |

### Kingdom of Saudi Arabia (SA)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Group: SA – Monthly (SA) |  |
| Pay Component: SA – Basic Pay (1000SA) |  |
| Amount (of existing pay component): adapt as appropriate, for example by entering a higher/lower amount | You may use the  Change Calculator to adapt the Total Amount by calculating with a positive/negative percentage or a positive/negative amount. Choose Save to save the new amount. |
| Currency: leave as is, SAR |  |
| Frequency: calculated based on value of field Pay Group leave as is, Monthly(MON) |  |
| new Pay Component: for example SA - Monthly housing allowance (2010SA) | If appropriate, add a new or adapt an existing Pay Component related to recurring payments. In case a suggested amount occurs, you may enter a higher/lower amount. |

### United States (US)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Pay Group: US – Monthly (UM) |  |
| Pay Component: US – Monthly Salary (1002US) |  |
| Amount (of existing pay component): adapt as appropriate, for example by entering a higher/lower amount | You may use the  Change Calculator to adapt the Total Amount by calculating with a positive/negative percentage or a positive/negative amount. Choose Save to save the new amount. |
| Currency: leave as is, USD |  |
| Frequency: calculated based on value of field Pay Group leave as is, (Monthly(MON) |  |
| new Pay Component: for example US - Car Allowance (1122US) | If appropriate, add a new or adapt an existing Pay Component related to recurring payments. In case a suggested amount occurs, you may enter a higher/lower amount. |

# 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:

* 2nd Level Manager
* HR Business Partner

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.
3. On the Details screen, review the request, and if satisfied, choose 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 choose Send Back at the bottom of the page. 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 |
| --- | --- |
| Integration with SAP SuccessFactors Employee Central Payroll (15O) (Optional) | **In case integration with Employee Central Payroll is in place,** the employee data is transferred from Employee Central to 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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