|  |  |
| --- | --- |
|  |  |
| Test Script  SAP SuccessFactors HCM Core  April 2018  English | Customer |
| Take Action: Termination  ID: FJ3 |

Table of Contents

[1 Purpose 3](#_Toc507684110)

[1.1 Purpose of the Document 3](#_Toc507684111)

[1.2 Purpose of Take Action: Termination 3](#_Toc507684112)

[2 Prerequisites 5](#_Toc507684113)

[2.1 Configuration 5](#_Toc507684114)

[2.2 System Access 5](#_Toc507684115)

[2.3 Roles 5](#_Toc507684116)

[2.4 Master Data, Organizational Data, and Other Data 6](#_Toc507684117)

[2.5 Business Conditions 6](#_Toc507684118)

[3 Overview Table 7](#_Toc507684119)

[4 Testing the Process Steps 8](#_Toc507684120)

[4.1 Entering Termination Data 8](#_Toc507684129)

[4.1.1 Sending E-mail Notification about Terminated Employee 11](#_Toc507684133)

[4.1.2 Receiving E-mail Notification about Terminated Employee 12](#_Toc507684134)

[4.1.3 Updating Position (if Position Management implemented) 12](#_Toc507684135)

[4.2 Viewing Position Details (if Position Management implemented) 12](#_Toc507684136)

[4.3 Viewing Terminated Employee Data 15](#_Toc507684137)

[5 Country-Specific Fields 17](#_Toc507684139)

[5.1 Termination Data 17](#_Toc507684140)

[5.1.1 United Arab Emirates (AE) 17](#_Toc507684143)

[5.1.2 Australia (AU) 18](#_Toc507684144)

[5.1.3 China (CN) 20](#_Toc507684148)

[5.1.4 Germany (DE) 21](#_Toc507684152)

[5.1.5 France (FR) 22](#_Toc507684153)

[5.1.6 United Kingdom (GB) 24](#_Toc507684154)

[5.1.7 Kingdom of Saudi Arabia (SA) 25](#_Toc507684155)

[5.1.8 United States (US) 26](#_Toc507684156)

[6 Appendix 29](#_Toc507684157)

[6.1 Process Chains 29](#_Toc507684158)

[6.1.1 Preceding Processes 29](#_Toc507684159)

[6.1.2 Succeeding Processes 29](#_Toc507684160)

Document History

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

# Purpose

## Purpose of the Document

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

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

## Purpose of Take Action: Termination

This document describes the entering of termination data for an employee into the system.

If the work agreement between employer and employee has been dissolved due to various reasons, for example, notice by employee, mutual agreement or dismissal, the employee leaves the enterprise and the work relationship is terminated. Termination relevant data has to be entered into the system. Both the former 2nd level manager and the former HR business partner of the terminated employee will be notified about the termination of an employee within their area of responsibility.

 Note

The termination data can be entered by the HR Administrator or by the Line Manager. The document describes the process using the HR Administrator.

In case Position Management is implemented in the SAP SuccessFactors Employee Central instance, it can be decided if the position to which the employee has been assigned during his or her appointment at the company remains active or is to be deactivated. In case the position remains active, it will remain without incumbent starting the first day after the termination date. We recommend checking explicitly whether headcount is available or not for that position and update this information manually. A position can be deactivated during the termination process in case no other incumbent is assigned to this position and no active lower-level positions exist below this position. The updated position details can be viewed.

 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 (EC) | 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>  as provided in the email notification from the HR Administrator  Alternatively, for testing purpose you can proxy as the role using SAP BestPractices Super Admin (EC) 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>  as provided in the email notification from the HR Administrator  Alternatively, for testing purpose you can proxy as the role using SAP BestPractices Super Admin (EC) 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 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: Termination consists of several process steps provided in the table below.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Process Step | UI Type | Business Condition | Business Role | Transaction Code | Expected Results |
| Enter Termination Data | Employee Central UI |  | HR Administrator | Company Instance URL | The termination data for an employee has been entered into the system. The employee has status Terminated or Retired starting the first day after the termination date. |
| Send E-mail Notification about Terminated Employee | Back-ground | E-Mail addresses of both 2nd level manager and HR business partner of employee are maintained in their employee file. | - |  | An email has been sent out to the 2nd level manager and the HR business partner of the employee, notifying them about the finished Terminate action. |
| Receive E-mail Notification about Terminated Employee | E-Mail |  | HR Business Partner (of the employee);  2nd Level Manager | outside software | The former 2nd level manager and the former HR business partner of the employee have received an e-mail notification about the termination of the employee. |
| Update Position (Optional) | Back-ground | Relevant only in case Position Management is implemented in your *Employee Central* instance. | - |  | The position to which the employee was assigned until his or her termination is updated automatically upon submitting the termination data. |
| View Position Details (Optional) | Employee Central UI | Relevant only in case Position Management is implemented in your *Employee Central* instance. | HR Administrator | Company Instance URL | The details of the terminated employee’s position have been viewed in the position org chart. |
| View Terminated Employee Data | Employee Central UI |  | HR Business Partner (of the employee);  2nd Level Manager | Company Instance URL | The data of the terminated employee as maintained in the system has been viewed. |

 Caution

All optional steps mentioned in the table above are mandatory only in case Position Management is implemented in your Employee Central instance.

# Testing the Process Steps

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

The test should take 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.

## Entering Termination Data

Test Administration

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

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

Purpose

The HR Administrator enters the data of an employee regarding termination of employment.

Procedure

 Caution

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

 Recommendation

For a complete list of event reasons relevant for the country where your company is located, please 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 | Log on to Employee Central as HR administrator. |  | The Home page is displayed. |  |
| 2 | Search Employee | In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee, you want to terminate. |  | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | Select the appropriate employee from the result list. |  | You are directed to the Employee Files page in which the profile of the employee is displayed. |  |
| 4 | Start Termination Action for Employee | From the ~~Take~~ Actions drop down menu, select Terminate.  Note  The ~~Take~~ Actions button is located at the top right of the screen. |  | The Terminate screen is displayed.   Note  In case Concurrent Employment Management and/or Global Assignment Management is implemented in the instance, a dialog box comes up asking you to choose the appropriate employment or the appropriate assignment to be terminated. The option to choose the employment/assignment occurs only in case two employments or two active assignments exist for the employee.  In case the Concurrent Employment Management and/or Global Assignment Management content has been deployed with the SAP Best Practices, you can refer for further details to test script of scope items Manage Concurrent Employment (1Z8) and Manage Global Assignment (1ZA). |  |
| 5 | Enter Termination Data for Employee | On the Terminate screen make the following entries:   Note  This information is country-specific. | Enter data as required in the country where your company is located.   Caution  For a detailed list refer to chapter [Country-Specific Fields 🡪 Termination Data](#_Termination_Data). |  |  |
| 6 | Save Data | Choose the Save button. |  | A system message is generated informing about the successful saving of the termination.  Additionally a notification via e-mail has been sent to the 2nd level manager as well as to the HR business partner of the terminated employee.  You are directed to the My Employee File → **<**terminated employee name> → Employment Information screen. |  |
| 7 | Verify Termination of Employee | In the Job Information block of the Job Information subsection, verify that the Employee Status has value Terminated or Retired starting the first day after the termination date.  In case the termination date is in the future, you are informed in the Job Information block that a future change in job information is pending. Select this link and check that the Employee Status value Terminated or Retired becomes effective starting the first day after the termination date. |  | The employee has been terminated and is no longer active in the system starting the first day after the termination date. When searching for employees this particular employee is no longer available in the result list starting the first day after the termination date. |  |

 Note

In case the terminated employee received recurring payments or paid recurring deductions, these records can be delimited. Even though the employee status is terminated and payroll will not consider this employee anymore, you may want to have a correct employee history record in case the employee applies in the future for another job at the company.

In case you want to delimit the recurring payments or deductions records, go to the employee’s Compensation Information block and select the History icon (Clock icon). On the upcoming Compensation Information Changes screen select the Insert New Record link. On the upcoming Insert Record for Compensation Information screen, in the When would you like your changes to take effect? field enter the first day after the termination date. In the Event field enter Termination and in the Event Reason field that entry, you entered in test step # 6 in the table above. In the Compensation block of the screen, delete the appropriate Pay Component by choosing the Trash Bin icon next to it. Save the data.

In case you want to delimit the recurring deductions records, go to the employee’s Recurring Deduction block and select the History icon (Clock icon). On the upcoming screen select the Insert New Record link. On the upcoming Insert History Record for Recurring Deduction screen, in the When would you like your changes to take effect? field enter the first day after the termination date and delete the appropriate Pay Component by choosing the Trash Bin icon next to it. Save the data.

 Caution

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

### Sending E-mail Notification about Terminated Employee

Purpose

Upon saving the record of the terminated employee, an email notification with subject The Terminate action for <employee name> has completed is sent automatically to the 2nd Level Manager of the terminated employee, as well as to the HR Business Partner assigned via the Job Relationships block to the terminated employee.

Prerequisites

The email addresses of the employee’s former 2nd level manager and HR business partner need to be maintained in their employee files in the Contact Information block.

Procedure

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

### Receiving E-mail Notification about Terminated Employee

Purpose

Both the former 2nd Level Manager and the HR Business Partner of the terminated employee receive email notifications from the email account of the HR Administrator who entered the termination data into the system. The email informs them that the Terminate action has been completed for the terminated employee.

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

### Updating Position (if Position Management implemented)

Purpose

**In case Position Management is implemented in your Employee Central instance:** upon submitting the termination data, the position the employee has been assigned to, remains automatically without incumbent starting the first day after the termination date.

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

## Viewing Position Details (if Position Management implemented)

Test Administration

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

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

Purpose

 Caution

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

In case you do not use Position Management, you may ignore this chapter!

The HR Administrator views if the former position of the terminated employee has been updated as expected.

The following two use cases are described:

* the position remains active after the employee is terminated
* the position has been deactivated during the termination process

 Note

It is considered that the employee was assigned to a regular and not to a mass position.

Procedure

Use case 1: position remains active after the employee’s termination

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR administrator. | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. |  |
| 3 | Search Former Employee Position | Go to the Position Org Chart tab.  In the Search By field, select value Positions from the drop-down. In the Search field, select from the drop-down the position assigned to the employee before his or her termination.  Select the calendar icon  located in the top right corner of the screen and choose from calendar help the first day after the termination date (or any other date after that date). | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. |  |
| 4 | View Position High-Level Data | Verify that number of incumbents (visible in <current #> / <target #> FTE) has decreased accordingly, for example by 1. |  |  |
| 5 | View Detailed Position Data | To view detailed data of the position, select the position in the position org chart. In the upcoming side panel next to the position, choose the Show Position  icon located below <position title (code)> and next to as of <selected date>. | The Position: <position title (code)> window shows up containing the position details.   Note  The field To Be Hired has still value No as we strongly recommend checking explicitly whether headcount is still available for that position. |  |
| 6 | Adapt Position Details (Optional) | In case headcount is available, adapt the position details manually by selecting the Edit link in the Position: <position title (code)> window. Enter an effective date for the change, typically the first day after the termination date of the employee. Choose the Proceed button. Set field To Be Hired to Yes. Then choose Save. |  |  |
| 7 | Close Window | When done, choose the X (Cancel) button. |  |  |
| 8 | Select History of Incumbents | To view the history of position holders, select that position in the position org chart. In the upcoming side panel next to the position select the Show Menu  icon, and in the upcoming small callout choose Show Incumbent History. | The Incumbent History dialog box shows up containing the incumbents of the position in the last year. |  |
| 9 | View History of Position Holders | In the From and To fields select appropriate dates from the calendar help, which also include the employee’s termination date. | Details of the employee(s) occupying the position during the selected period are shown. The terminated employee should show up with the date period spent at the company. |  |
| 10 | Close Window | When done, choose the Close button. |  |  |

Use case 2: position has been deactivated during employee’s termination

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR administrator. | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. |  |
| 3 | Search Former Employee Position | Go to the Position Org Chart tab.  In the Search By field, select value Positions from the drop-down. In the Search field, select from the drop-down the position assigned to the employee before his or her termination.  Select the calendar icon  located in the top right corner of the screen and choose the termination date from calendar help. | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. |  |
| 4 | View Position History | Select that position in the position org chart. In the upcoming side panel next to the position choose the Position History. | The menu is expanded and administrative details are shown, like effective date of creation, last change (if existing), and next change (which should take place the first day after the employee’s termination date). |  |
| 5 | Select Next Change Details | Choose the Show Position  icon located next to Next change. | The Position: <position title (code)> window shows up containing the position details. |  |
| 6 | View Position Details | Verify that field Status has value InActive starting the first day after the employee’s termination date (visible in field Start Date). |  |  |
| 7 | Close Window | When done, choose the Close button. | You return to the Position Org Chart screen. |  |
| 8 | Check Inactive Position in Position Org Chart | In the Search By field, select value Positions from the drop-down. In the Search field, select from the drop-down the position assigned to the employee before his or her termination.  Select the calendar icon  located in the top right corner of the screen and choose from calendar help any date after the termination date of the employee. | The position is no longer available in the position org chart and the system displays an appropriate message. |  |

## Viewing Terminated Employee Data

Test Administration

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | 2nd Level Manager and HR Business Partner (of the employee) | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

 Caution

This process step needs to be executed by both the 2nd Level Manager of the employee and the HR Business Partner assigned to the employee. As the procedure is the same for both roles, we describe it only once!

After having received the email notification about a terminated employee in their area of responsibility, the former 2nd Level Manager and the HR Business Partner of the employee view the data of that employee as maintained in the system.

Note

The information in the employee file visible for the 2nd Level Manager and HR Business Partner depends on the permissions granted to their individual roles.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Go to your e-mail inbox and search the e-mail from the HR Administrator who has entered the termination data into the system.  Note  The subject of this email states something like The Terminate action for <employee name> has completed.  Open this e-mail and choose the available hyperlink. You are directed to the *Employee Central* login screen, where you need to enter your password (your username is defaulted). | You are directed to the Employee Files page in which the (public) profile of the terminated employee is displayed. |  |
| 2 | View Employee Status | To view the employee data check the Job Information block. The Employee Status is set to Terminated or Retired starting the first day after he or she has left the company. |  |  |
| 3 | View Time Account Balance | To view the Time Account Balances on Annual Leave check the Employment Details block. The balance for Annual Leave is showing up as 0 days available.  Note  This test step is only relevant for AU, because in case an employee is leaving and has a time balance on a given time account it is possible for HR administrators to make financial payouts on time accounts before terminating the Employee. After the termination the Account Balance should be 0. |  |  |

# Country-Specific Fields

## Termination Data

### United Arab Emirates (AE)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Termination Date: select employee’s last day at work from calendar help |  |
| Termination Reason: Termination–Other(TEROTH) |  |
| 6 Payroll fields: calculated based on value of field Termination Date, leave as is |  |
| OK to Rehire: defaults to No, leave as is or select Yes from drop-down | In case you like to rehire this employee in the future, select Yes. |
| Regret Termination: defaults to No, leave as is or select Yes from drop-down |  |
| Eligible for Salary Continuation: defaults to No, leave as is or select Yes from drop-down |  |
| Attachment: use drag and drop or the + button. | optional step:  You can attach a supporting document on the termination. |
| Deactivate Position: proposed value No, leave as is | In case Position Management is implemented in your Employee Central instance:  If the position, to which the employee to be terminated is assigned, has no other incumbent and has no lower level-positions, you can choose to deactivate this position or keep it active.  In case the position has still incumbent(s) or has lower-level positions, the Deactivate Position field is read-only. |
| Time Account Balance as of Termination Date for <job title, location>: check the remaining balances of time types that have an accrual rule assigned | In case Time Off is implemented in your Employee Central instance (optional step):  Ideally, the employee has taken all time off and the balance is zero. If this is not the case, before terminating the employee you need to reduce the time accounts manually to zero and maintain appropriate pay components with the equivalent amount of money. In this case cancel the termination. |
| Transfer Direct Reports: |  |
| Who should the <#> direct report(s) of <terminated employee name> report to after the termination?: Everyone to upper manager <upper manager name> is defaulted, leave as is or select appropriate employee rom drop-down | In case the employee, who is terminated has direct reports, select in the Transfer Direct Reports part to whom these direct reports should report after the employee’s termination.  Depending on the value chosen in the Who should the <#> direct report(s) of <terminated employee name> report to after the termination? field, different values than the one given in the example might be entered into the Transfer Event Reason field. In addition, additional fields to be filled might show up; fill them as appropriate. The change will be visible in the Job Information block of the affected direct reports. |
| Terminate:  Transfer Event Reason: select for example DataChange(DATACHG) from drop-down |
| Transfer Job Relationships: |  |
| Transfer to: upper manager is defaulted, leave as is or select appropriate employee from drop-down | In case the employee who is terminated has job relationships, for example of type HR Manager, to other employees, you need to select in the Transfer Job Relationships part to whom these employees should be transferred after the employee’s termination: |
| Transfer Date: defaults to the first day after the employee’s termination date; leave as is |  |
| Terminate Relationship: defaults No; leave as is | In case the job relationship to the employee should be terminated anyway, select Yes. |

### Australia (AU)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Termination Date: select employee’s last day at work from calendar help |  |
| Termination Reason: Vol Termination–Personal (TERVPERS) |  |
| 6 Payroll fields: calculated based on value of field Termination Date, leave as is |  |
| OK to Rehire: defaults to No, leave as is or select Yes from drop-down | In case you like to rehire this employee in the future, select Yes. |
| Regret Termination: defaults to No, leave as is or select Yes from drop-down |  |
| Eligible for Salary Continuation: defaults to No, leave as is or select Yes from drop-down |  |
| Attachment: use drag and drop or the + button. | optional step:  You can attach a supporting document on the termination. |
| Deactivate Position: proposed value No, leave as is | In case Position Management is implemented in your Success Factors Employee Central instance:  If the position, to which the employee to be terminated is assigned, has no other incumbent and has no lower level-positions, you can choose to deactivate this position or keep it active.  In case the position has still incumbent(s) or has lower-level positions, the Deactivate Position field is read-only. |
| Time Account Balance as of Termination Date for <job title, location>: check the remaining balances of time types that have an accrual rule assigned | In case Time Off is implemented in your Success Factors Employee Central instance (optional step):  The remaining balances are obtained by deducting accruals for the remainder of the calendar year after the termination on a monthly basis.  These time types are Annual Leave, Sick leave, Long Service Leave (if applicable for the employee), and Time Off in Lieu (if applicable for the employee). |
| Payout: Complete Balance: check the radio-button Custom Rate in AUD: enter for example 40 | In case Time Off is implemented in your Success Factors Employee Central instance (optional step):  Make entries on the Account Payout window (Optional)  In case an employee is leaving and has a time balance on a given time account it is possible for HR administrators to make financial payouts on time accounts. Payout can be made for either the full balances of Annual leave or Partial balance.  In the upcoming Account Payout window choose whether you want to payout completely or partially and enter a custom rate.  Then choose Save.  Note  Termination payment data needs to be maintained for the employee, because he or she is to receive lump payments as a consequence of the termination. For this refer also to test script of scope item Integration with SAP SuccessFactors Employee Central Payroll (15O), process step Maintaining Termination Payment Data, where the maintenance procedure is given. |
| Transfer Direct Reports: |  |
| Who should the <#> direct report(s) of <terminated employee name> report to after the termination?: Everyone to upper manager <upper manager name> is defaulted, leave as is or select appropriate employee rom drop-down | In case the employee, who is terminated has direct reports, select in the Transfer Direct Reports part to whom these direct reports should report after the employee’s termination.  Depending on the value chosen in the Who should the <#> direct report(s) of <terminated employee name> report to after the termination? field, different values than the one given in the example might be entered into the Transfer Event Reason field. In addition, additional fields to be filled might show up; fill them as appropriate. The change will be visible in the Job Information block of the affected direct reports. |
| Terminate:  Transfer Event Reason: select for example DataChange(DATACHG) from drop-down |
| Transfer Job Relationships: |  |
| Transfer to: upper manager is defaulted, leave as is or select appropriate employee from drop-down | In case the employee who is terminated has job relationships, for example of type HR Manager, to other employees, you need to select in the Transfer Job Relationships part to whom these employees should be transferred after the employee’s termination: |
| Transfer Date: defaults to the first day after the employee’s termination date; leave as is |  |
| Terminate Relationship: defaults No; leave as is | In case the job relationship to the employee should be terminated anyway, select Yes. |

### China (CN)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Termination Date: select employee’s last day at work from calendar help |  |
| Termination Reason: Early Retirement (TERERLRT) |  |
| 6 Payroll fields: calculated based on value of field Termination Date, leave as is |  |
| OK to Rehire: defaults to No, leave as is or select Yes from drop-down | In case you like to rehire this employee in the future, select Yes. |
| Regret Termination: defaults to No, leave as is or select Yes from drop-down |  |
| Eligible for Salary Continuation: defaults to No, leave as is or select Yes from drop-down |  |
| Attachment: use drag and drop or the + button. | optional step:  You can attach a supporting document on the termination. |
| Deactivate Position: proposed value No, leave as is | In case, Position Management is implemented in your Success Factors Employee Central instance:  If the position, to which the employee to be terminated is assigned, has no other incumbent and has no lower level-positions, you can choose to deactivate this position or keep it active.  In case the position has still incumbent(s) or has lower-level positions, the Deactivate Position field is read-only. |
| Time Account Balance as of Termination Date for <job title, location>: check the remaining balances of time types that have an accrual rule assigned | In case Time Off is implemented in your Success Factors Employee Central instance (optional step):  Ideally, the employee has taken all time off and the balance is zero. If this is not the case, before terminating the employee you need to reduce the time accounts manually to zero and maintain appropriate pay components with the equivalent amount of money. In this case cancel the termination. |
| Transfer Direct Reports: |  |
| Who should the <#> direct report(s) of <terminated employee name> report to after the termination?: Everyone to upper manager <upper manager name> is defaulted, leave as is or select appropriate employee rom drop-down | In case the employee, who is terminated has direct reports, select in the Transfer Direct Reports part to whom these direct reports should report after the employee’s termination.  Depending on the value chosen in the Who should the <#> direct report(s) of <terminated employee name> report to after the termination? field, different values than the one given in the example might be entered into the Transfer Event Reason field. In addition, additional fields to be filled might show up; fill them as appropriate. The change will be visible in the Job Information block of the affected direct reports. |
| Terminate:  Transfer Event Reason: select for example Supervisor Change Only (JOBSUPRV) from drop-down |
| Transfer Job Relationships: |  |
| Transfer to: upper manager is defaulted, leave as is or select appropriate employee from drop-down | In case the employee who is terminated has job relationships, for example of type HR Manager, to other employees, you need to select in the Transfer Job Relationships part to whom these employees should be transferred after the employee’s termination: |
| Transfer Date: defaults to the first day after the employee’s termination date; leave as is |  |
| Terminate Relationship: defaults No; leave as is | In case the job relationship to the employee should be terminated anyway, select Yes. |

### Germany (DE)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Termination Date: select employee’s last day at work from calendar help |  |
| Termination Reason: Termination–Other(TEROTH) |  |
| 6 Payroll fields: calculated based on value of field Termination Date, leave as is |  |
| OK to Rehire: defaults to No, leave as is or select Yes from drop-down | In case you like to rehire this employee in the future, select Yes. |
| Regret Termination: defaults to No, leave as is or select Yes from drop-down |  |
| Eligible for Salary Continuation: defaults to No, leave as is or select Yes from drop-down |  |
| Attachment: use drag and drop or the + button. | optional step:  You can attach a supporting document on the termination. |
| Deactivate Position: proposed value No, leave as is | In case Position Management is implemented in your Success Factors Employee Central instance:  If the position, to which the employee to be terminated is assigned, has no other incumbent and has no lower level-positions, you can choose to deactivate this position or keep it active.  In case the position has still incumbent(s) or has lower-level positions, the Deactivate Position field is read-only. |
| Time Account Balance as of Termination Date for <job title, location>: check the remaining balances of time types that have an accrual rule assigned | In case Time Off is implemented in your Success Factors Employee Central instance (optional step):  Ideally, the employee has taken all time off and the balance is zero. If this is not the case, before terminating the employee you need to reduce the time accounts manually to zero and maintain appropriate pay components with the equivalent amount of money. In this case cancel the termination.  These time types are Vacation and possibly Special Holiday, in case of a challenged employee. |
| Transfer Direct Reports: |  |
| Who should the <#> direct report(s) of <terminated employee name> report to after the termination?: Everyone to upper manager <upper manager name> is defaulted, leave as is or select appropriate employee rom drop-down | In case the employee, who is terminated has direct reports, select in the Transfer Direct Reports part to whom these direct reports should report after the employee’s termination.  Depending on the value chosen in the Who should the <#> direct report(s) of <terminated employee name> report to after the termination? field, different values than the one given in the example might be entered into the Transfer Event Reason field. In addition, additional fields to be filled might show up; fill them as appropriate. The change will be visible in the Job Information block of the affected direct reports. |
| Terminate:  Transfer Event Reason: select for example DataChange(DATACHG) from drop-down |
| Transfer Job Relationships: |  |
| Transfer to: upper manager is defaulted, leave as is or select appropriate employee from drop-down | In case the employee who is terminated has job relationships, for example of type HR Manager, to other employees, you need to select in the Transfer Job Relationships part to whom these employees should be transferred after the employee’s termination: |
| Transfer Date: defaults to the first day after the employee’s termination date; leave as is |  |
| Terminate Relationship: defaults No; leave as is | In case the job relationship to the employee should be terminated anyway, select Yes. |

### France (FR)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Termination Date: select employee’s last day at work from calendar help |  |
| Termination Reason: Termination–Other(TEROTH) |  |
| 6 Payroll fields: calculated based on value of field Termination Date, leave as is |  |
| OK to Rehire: defaults to No, leave as is or select Yes from drop-down | In case you like to rehire this employee in the future, select Yes. |
| Regret Termination: defaults to No, leave as is or select Yes from drop-down |  |
| Eligible for Salary Continuation: defaults to No, leave as is or select Yes from drop-down |  |
| Attachment: use drag and drop or the + button. | optional step:  You can attach a supporting document on the termination. |
| Deactivate Position: proposed value No, leave as is | In case Position Management is implemented in your Success Factors Employee Central instance:  If the position, to which the employee to be terminated is assigned, has no other incumbent and has no lower level-positions, you can choose to deactivate this position or keep it active.  In case the position has still incumbent(s) or has lower-level positions, the Deactivate Position field is read-only. |
| Time Account Balance as of Termination Date for <job title, location>: check the remaining balances of time types that have an accrual rule assigned | In case Time Off is implemented in your Success Factors Employee Central instance (optional step):  Ideally, the employee has taken all time off and the balance is zero. If this is not the case, before terminating the employee you need to reduce the time accounts manually to zero and maintain appropriate pay components with the equivalent amount of money. In this case cancel the termination. |
| Transfer Direct Reports: |  |
| Who should the <#> direct report(s) of <terminated employee name> report to after the termination?: Everyone to upper manager <upper manager name> is defaulted, leave as is or select appropriate employee rom drop-down | In case the employee, who is terminated has direct reports, select in the Transfer Direct Reports part to whom these direct reports should report after the employee’s termination.  Depending on the value chosen in the Who should the <#> direct report(s) of <terminated employee name> report to after the termination? field, different values than the one given in the example might be entered into the Transfer Event Reason field. In addition, additional fields to be filled might show up; fill them as appropriate. The change will be visible in the Job Information block of the affected direct reports. |
| Terminate:  Transfer Event Reason: select for example DataChange(DATACHG) from drop-down |
| Transfer Job Relationships: |  |
| Transfer to: upper manager is defaulted, leave as is or select appropriate employee from drop-down | In case the employee who is terminated has job relationships, for example of type HR Manager, to other employees, you need to select in the Transfer Job Relationships part to whom these employees should be transferred after the employee’s termination: |
| Transfer Date: defaults to the first day after the employee’s termination date; leave as is |  |
| Terminate Relationship: defaults No; leave as is | In case the job relationship to the employee should be terminated anyway, select Yes. |

### United Kingdom (GB)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Termination Date: select employee’s last day at work from calendar help |  |
| Termination Reason: Vol-Work Life Balance (TERVWLB) |  |
| 6 Payroll fields: calculated based on value of field Termination Date, leave as is |  |
| OK to Rehire: defaults to No, leave as is or select Yes from drop-down | In case you like to rehire this employee in the future, select Yes. |
| Regret Termination: defaults to No, leave as is or select Yes from drop-down |  |
| Eligible for Salary Continuation: defaults to No, leave as is or select Yes from drop-down |  |
| Attachment: use drag and drop or the + button. | optional step:  You can attach a supporting document on the termination. |
| Deactivate Position: proposed value No, leave as is | In case Position Management is implemented in your Success Factors Employee Central instance:  If the position, to which the employee to be terminated is assigned, has no other incumbent and has no lower level-positions, you can choose to deactivate this position or keep it active.  In case the position has still incumbent(s) or has lower-level positions, the Deactivate Position field is read-only. |
| Time Account Balance as of Termination Date for <job title, location>: check the remaining balances of time types that have an accrual rule assigned | In case Time Off is implemented in your Success Factors Employee Central instance (optional step):  Ideally, the employee has taken all time off and the balance is zero. If this is not the case, before terminating the employee you need to reduce the time accounts manually to zero and maintain appropriate pay components with the equivalent amount of money. In this case cancel the termination.  These time types are Holiday or Public Holiday, depending on the employment type of the employee. |
| Transfer Direct Reports: |  |
| Who should the <#> direct report(s) of <terminated employee name> report to after the termination?: Everyone to upper manager <upper manager name> is defaulted, leave as is or select appropriate employee rom drop-down | In case the employee, who is terminated has direct reports, select in the Transfer Direct Reports part to whom these direct reports should report after the employee’s termination.  Depending on the value chosen in the Who should the <#> direct report(s) of <terminated employee name> report to after the termination? field, different values than the one given in the example might be entered into the Transfer Event Reason field. In addition, additional fields to be filled might show up; fill them as appropriate. The change will be visible in the Job Information block of the affected direct reports. |
| Terminate:  Transfer Event Reason: select for example DataChange(DATACHG) from drop-down |
| Transfer Job Relationships: |  |
| Transfer to: upper manager is defaulted, leave as is or select appropriate employee from drop-down | In case the employee who is terminated has job relationships, for example of type HR Manager, to other employees, you need to select in the Transfer Job Relationships part to whom these employees should be transferred after the employee’s termination: |
| Transfer Date: defaults to the first day after the employee’s termination date; leave as is |  |
| Terminate Relationship: defaults No; leave as is | In case the job relationship to the employee should be terminated anyway, select Yes. |

### Kingdom of Saudi Arabia (SA)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Termination Date: select employee’s last day at work from calendar help |  |
| Termination Reason: Termination–Other(TEROTH) |  |
| 6 Payroll fields: calculated based on value of field Termination Date, leave as is |  |
| OK to Rehire: defaults to No, leave as is or select Yes from drop-down | In case you like to rehire this employee in the future, select Yes. |
| Regret Termination: defaults to No, leave as is or select Yes from drop-down |  |
| Eligible for Salary Continuation: defaults to No, leave as is or select Yes from drop-down |  |
| Attachment: use drag and drop or the + button. | optional step:  You can attach a supporting document on the termination. |
| Deactivate Position: proposed value No, leave as is | In case Position Management is implemented in your Success Factors Employee Central instance:  If the position, to which the employee to be terminated is assigned, has no other incumbent and has no lower level-positions, you can choose to deactivate this position or keep it active.  In case the position has still incumbent(s) or has lower-level positions, the Deactivate Position field is read-only. |
| Time Account Balance as of Termination Date for <job title, location>: check the remaining balances of time types that have an accrual rule assigned | In case Time Off is implemented in your Success Factors Employee Central instance (optional step):  Ideally, the employee has taken all time off and the balance is zero. If this is not the case, before terminating the employee you need to reduce the time accounts manually to zero and maintain appropriate pay components with the equivalent amount of money. In this case cancel the termination. |
| Transfer Direct Reports: |  |
| Who should the <#> direct report(s) of <terminated employee name> report to after the termination?: Everyone to upper manager <upper manager name> is defaulted, leave as is or select appropriate employee rom drop-down | In case the employee, who is terminated has direct reports, select in the Transfer Direct Reports part to whom these direct reports should report after the employee’s termination.  Depending on the value chosen in the Who should the <#> direct report(s) of <terminated employee name> report to after the termination? field, different values than the one given in the example might be entered into the Transfer Event Reason field. In addition, additional fields to be filled might show up; fill them as appropriate. The change will be visible in the Job Information block of the affected direct reports. |
| Terminate:  Transfer Event Reason: select for example DataChange(DATACHG) from drop-down |
| Transfer Job Relationships: |  |
| Transfer to: upper manager is defaulted, leave as is or select appropriate employee from drop-down | In case the employee who is terminated has job relationships, for example of type HR Manager, to other employees, you need to select in the Transfer Job Relationships part to whom these employees should be transferred after the employee’s termination: |
| Transfer Date: defaults to the first day after the employee’s termination date; leave as is |  |
| Terminate Relationship: defaults No; leave as is | In case the job relationship to the employee should be terminated anyway, select Yes. |

### United States (US)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Termination Date: select employee’s last day at work from calendar help |  |
| Termination Reason: Termination–Other(TEROTH) |  |
| 6 Payroll fields: calculated based on value of field Termination Date, leave as is |  |
| OK to Rehire: defaults to No, leave as is or select Yes from drop-down | In case you like to rehire this employee in the future, select Yes. |
| Regret Termination: defaults to No, leave as is or select Yes from drop-down |  |
| Eligible for Salary Continuation: defaults to No, leave as is or select Yes from drop-down |  |
| Attachment: use drag and drop or the + button. | optional step:  You can attach a supporting document on the termination. |
| Deactivate Position: proposed value No, leave as is | In case Position Management is implemented in your Success Factors Employee Central instance:  If the position, to which the employee to be terminated is assigned, has no other incumbent and has no lower level-positions, you can choose to deactivate this position or keep it active.  In case the position has still incumbent(s) or has lower-level positions, the Deactivate Position field is read-only. |
| Time Account Balance as of Termination Date for <job title, location>: check the remaining balances of time types that have an accrual rule assigned | In case Time Off is implemented in your Success Factors Employee Central instance (optional step):  The remaining balances are obtained by deducting accruals for the remainder of the calendar year after the termination on a monthly basis.  Die verbliebenen Balances werden erhalten, indem abziehen Aufgelaufenes für den Rest des Kalenderjahres |
| Transfer Direct Reports: |  |
| Who should the <#> direct report(s) of <terminated employee name> report to after the termination?: Everyone to upper manager <upper manager name> is defaulted, leave as is or select appropriate employee rom drop-down | In case the employee, who is terminated has direct reports, select in the Transfer Direct Reports part to whom these direct reports should report after the employee’s termination.  Depending on the value chosen in the Who should the <#> direct report(s) of <terminated employee name> report to after the termination? field, different values than the one given in the example might be entered into the Transfer Event Reason field. In addition, additional fields to be filled might show up; fill them as appropriate. The change will be visible in the Job Information block of the affected direct reports. |
| Terminate:  Transfer Event Reason: select for example DataChange(DATACHG) from drop-down |
| Transfer Job Relationships: |  |
| Transfer to: upper manager is defaulted, leave as is or select appropriate employee from drop-down | In case the employee who is terminated has job relationships, for example of type HR Manager, to other employees, you need to select in the Transfer Job Relationships part to whom these employees should be transferred after the employee’s termination: |
| Transfer Date: defaults to the first day after the employee’s termination date; leave as is |  |
| Terminate Relationship: defaults No; leave as is | In case the job relationship to the employee should be terminated anyway, select Yes. |

# Appendix

## 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), process step Enter Hiring Data | To terminate an employee, this employee must have been hired 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 SAP SuccessFactors Employee Central Payroll is in place**, the employee data is transferred from SAP SuccessFactors Employee Central to SAP SuccessFactors Employee Central Payroll and can be checked there for correctness. |
| In case Contingent Workforce Management has been deployed with the SAP Best Practices: Manage Contingent Workforce (1Q0) (Optional) | **In case your company has already implemented Contingent Workforce Management when terminating the employee,** the terminated employee can be hired as a Contingent Worker. |

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. |

|  |
| --- |
|  |
| www.sap.com/contactsap |
| © 2018 SAP SE or an SAP affiliate company. All rights reserved.  No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.  SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. Please see <http://global.sap.com/corporate-en/legal/copyright/index.epx#trademark> for additional trademark information and notices.  Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors.  National product specifications may vary.  These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP SE or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP SE or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.  In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE’s or its affiliated companies’ strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions. |

