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| Test Script  SAP SuccessFactors HCM Core  April 2018  English | Customer |
| Data Change Employee File  ID: FJ5 |

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Document History

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

## Purpose of the Document

This document provides a detailed procedure for testing the scope item Data Change Employee File 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 Data Change Employee File

 Note

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

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

This document describes how an employee’s file can be updated and/or viewed within the SAP SuccessFactors Employee Central system.

As example, we consider maintenance of data related to the employee's personal information, namely:

* adaption of the home address,
* creation of a primary emergency contact,
* change in naming and possibly marital status information, and
* for countries AE, AU, CN, FR, and SA, the maintenance of work permit information.

Most likely, the employee him- or herself will keep this data up-to-date.

The change in name/marital status and the maintenance of work permit information trigger a workflow, which needs to be approved by the HR Business Partner of the employee, before the changes become effective in the system.

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

 Note

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

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

## Roles

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

| Business Role | Permission Role | Process Step | Sample data |
| --- | --- | --- | --- |
| Employee | SAP BestPractices Employee (Self Service for EC) | Refer to chapter Overview Table | Test user: <userid>; Password: <password>  For testing purpose, you can proxy as the role using SAP BestPractices Super Admin role. |
| (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. |

 Note

Optionally, the HR Administrator can execute the process steps instead of the Employee, too. In this case, use for testing purposes only the SAP BestPractices Super Admin role.

## Master Data, Organizational Data, and Other Data

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

## Business Conditions

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

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

# Overview Table

The scope item Data Change Employee File 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 |
| --- | --- | --- | --- | --- | --- |
| Enter Data Change in Employee File | Employee Central UI | Changes in the employee’s file are required. | Employee | Company Instance URL | The employee’s home address and primary emergency contact have been updated. |
| Maintenance of Employee’s Personal Information | | | | | |
| Enter Change in Personal Information | Employee Central UI | The employee has changed first name, middle name or last name, or marital status. | Employee | Company Instance URL | Changes in the employee’s personal information have been performed. A workflow has been triggered and sent to the HR Business Partner for approval. |
| Approve Change in Personal Information | Employee Central UI |  | HR Business Partner (of the employee) | Company Instance URL or Mobile App | The HR Business Partner has approved the change in personal information. The change has become effective in the system. |
| Maintenance of Employee’s Work Eligibility Data  \* relevant only for following countries: AE, AU, CN, FR, SA  \* relevant only for nationals of countries other than the country where the company is located | | | | | |
| Maintain Work Permit Information | Employee Central UI | One or both following use cases are showing up:   * The expiry date of the employee’s work permit document is approaching and the document needs to be updated. * A new work permit record needs to be created in the system. | Employee | Company Instance URL | Details of the employee’s work permit document have been maintained. A workflow has been triggered and sent to the HR Business Partner for approval. |
| Approve Work Permit Information | Employee Central UI |  | HR Business Partner (of the employee) | Company Instance URL or Mobile App | The HR Business Partner has approved the work permit information. The work permit document has become effective in the system. |
| Send E-mail Notification about Work Permit Information Approval | Back-ground | E-Mail address of both employee and line manager are maintained in their employee file. |  |  | An email has been sent out to the employee and the line manager of the employee, notifying them about the approved Add Work Permit Info action. |
| Receive E-mail Notification about Approval of my Work Permit Information | E-Mail |  | Employee | outside software | The employee has received an email notification informing him or her about the approval of the work permit information updates he or she has maintained. |
| Receive E-mail Notification about Approval of Employee Work Permit Information | E-Mail |  | Line Manager | outside software | The employee’s line manager has received an email notification about the approval of work permit information updates for his or her direct report. |

# Testing the Process Steps

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

 Note

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

 Recommendation

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

 Recommendation

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

This chapter is grouped into three subchapters:

* Changes in the employee file without triggering of a workflow;
* Maintenance of personal information with triggering of a workflow;
* for countries AE, AU, CN, FR, and SA: Maintenance of work eligibility data with triggering of a workflow.

Maintenance of personal information as well as of work eligibility data needs to be approved by the employee’s HR Business Partner, before the change becomes effective in the system. For this purpose, the Relationship Type HR Manager must have been maintained for the employee before he or she performs changes to the personal information or work eligibility.

 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). The Job Relationships block shows up in the dialog box. Select the ⊕ Add link and make the following entries:

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

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

## Entering Data Change in Employee File

Test Administration

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

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

Purpose

The Employee enters a data change in his or her Employee File, based on the granted permissions.

In this document, we consider following examples:

* the change of the employee’s home address,
* the creation of the data of the person to be contacted in case of an emergency suffered by the employee.

 Note

Depending on the permissions granted to the employee, he or she can update also other data than the ones described here, for example payment information or social accounts.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Employee. |  | The Home page is displayed. |  |
| 2 | Select My Employee File | From theHomedrop-down, select the My Employee File*.* |  | The My Employee File screen is displayed containing your profile. |  |
| 3 | View Personal Information | Go to the Personal Information section. Depending on the permissions granted, different subsections are visible.  View your data as of today or view the history of the data by selecting the Clock (History) icon where available. |  |  |  |
| 4 | Edit Address Information | Select the Pencil (Edit)icon in the block you need to change.  For example, select the Pencil (Edit)icon next to the Home Address block located in the Address Information subsection. |  | The Home Address dialog box is displayed. |  |
| 5 | Enter Effective Date of Change | Specify the effective date of change. | When would you like your changes to take effect?: defaults to today’s date, adapt as appropriate using calendar help. |  |  |
| 6 | Enter New Address Information | In the Home block make following entries:   Note  This information is country-specific. | Country: the country where the company is located is defaulted; leave as is |  |  |
| Enter other data as required in the country where your company is located.   Caution  For a detailed list refer to chapter **[Home Address](#_Home_Address)**. |  |
| 7 | Save Changes | Choose the Save button. |  | Your home address has been updated. |  |
| 8 | Edit Primary Emergency Contact | Select the Pencil (Edit)icon in the block you need to change.  For example, select the Pencil (Edit)icon next to the Primary Emergency Contact block located in the Emergency Contact subsection. |  | The Primary Emergency Contact dialog box is displayed. |  |
| 9 | Enter Primary Emergency Contact Information | In the Primary Emergency Contact block make following entries: | Relationship: select from drop-down |  |  |
| Primary: select from drop-down, for example Yes |  |
| Name: enter name of person to be contacted in case of emergency |  |
| Phone: enter phone number of emergency contact |  |
| eMail: enter e-mail of emergency contact |  |
| Dependent: select from drop-down, for example Yes |  |
| Emergency Contact: select from drop-down, for example Yes |  |
| Select the Edit details link. | Enter further details, for example Alt Phone, Gender, Date of Birth, and so on. |  |  |
| Copy Address from Employee: select for example Yes from drop-down in case the emergency contact has the same address like you   Note  In case you choose No, the address fields are editable; it is recommended that you add the address details of the emergency contact person. | Your address data has been taken over for the emergency contact and is read-only. |  |
| 10 | Save Changes | Choose the Save button. |  | The data related to the person, who should be contacted in case you suffer an emergency is visible in the Emergency Contact subsection of the Personal Information section. The primary emergency contact is marked with a star next to his or her name. |  |
| 11 | Add Additional Emergency Contact Person (Optional) | In case you want to add another person to be contacted in case of emergency, select in the Primary Emergency Contact block of the Emergency Contact subsection the ⊕ symbol. Select in the bottom left corner of the Primary Emergency Contact dialog box the Add Primary Emergency Contact link, and enter data as appropriate.   Caution  Pay attention to select in this case for field Primary value No from drop-down! |  |  |  |

 Note

The HR Administrator can also maintain data for an employee in the Employee File. For this, search for the employee and maintain the data as described in the procedure table above, starting with test step # 3.

 Caution

In case integration with Employee Central Payroll is in place and the data maintained is replication-relevant, these changes are replicated to Employee Central Payroll, where they can be checked. For this, execute test script of scope item Integration with SAP SuccessFactors Employee Central Payroll (15O). The Home Address described as example in this document is replication-relevant and is replicated to Employee Central Payroll.

## Maintenance of Employee’s Personal Information

Purpose

In case the employee changes his or her name or changes the marital status, the employee’s record needs to be updated accordingly in the Employee Central system. A change in personal information needs to be approved by the employee’s HR Business Partner, before the change becomes effective in the system. For this purpose, the Relationship Type HR Manager must have been maintained for the employee before a change in his or her personal information is performed.

### Entering Change in Personal Information

Test Administration

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

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

Purpose

The Employee enters into the system the relevant change in his or her personal information. These changes may refer to changes in naming or marital status.

Prerequisite

The Relationship Type HR Manager must have been maintained for the employee in order for a workflow to be triggered.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Employee. |  | The Home page is displayed. |  |
| 2 | Select My Employee File | From theHomedrop-down, select the My Employee File*.* |  | The My Employee File screen is displayed containing your profile. |  |
| 3 | Go to Personal Information | Go to the Personal Information section. |  |  |  |
| 4 | Edit Personal Information | Select the Pencil (Edit)icon in the Personal Information block, located in the Personal Information subsection. |  | The Personal Information dialog is displayed. |  |
| 5 | Enter Effective Date of Change | Enter effective date of change. | When would you like your changes to take effect?: select using calendar icon |  |  |
| 6 | Enter Personal Information | In the Personal Information block, make changes as appropriate. Example fields could include: | First Name: adapt as appropriate |  |  |
| Middle Name: adapt as appropriate |  |
| Last Name: adapt as appropriate |  |
| Marital Status: adapt as appropriate |  |
| You can upload a file documenting the change you have made. For this, select the  icon next to field Attachment. In the Choose File to Upload dialog box, browse for the document you want to upload, and then choose Open. In the upcoming success dialog box, choose OK. |  |  |  |
| 7 | Save Data | Choose the Save pushbutton. |  | A workflow is triggered. The Please confirm your request dialog box appears on the screen. |  |
| 8 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request, if appropriate. |  |  |  |
| 9 | Check Approver | In the dialog box, select the Show workflow participants link to verify the approver of the request. |  | In case of a change in personal information, the request needs to be approved by your HR Business Partner. |  |
| 10 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed. The workflow has been sent to the next processor. |  |

 Note

In case email is configured and the email address of your HR Business Partner is maintained in the system, he or she receives an automatic email about the workflow item needing his or her attention.

 Note

The HR Administrator can also enter the changes in the personal information data for the employee. For this, search for the employee and maintain the data as described in the procedure table above, starting with test step # 3.

### Approving Change in Personal Information

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

The HR Business Partner of the employee approves the change in the employee’s personal information in order for the changes to take effect in the system. Until the change is approved, the proposed change is pending.

Note

The HR Administrator can view the proposed change by selecting the Personal Information change pending approval (<mm/dd/yy>) link in the Personal Information block of the employee’s profile.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as HR Business Partner. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the request you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Change Request | On the Approve Requests dialog box, click on the Personal Information 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 Request (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for Request Type value Change Personal Info and in Initiated By the name of the employee who has reported the change in personal information. Then choose the Go button. In the result list, click on the appropriate Personal Information change for <Employee Name> link. | The Employee Files > Workflow Details screen is displayed, containing details to the change request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Personal Information section contains the detailed change request. * In the Comment section, you can post your remarks to the change request. * On the right part of the screen a short profile of the requesting employee is given, as well as administrative details to the request initiation. |  |
| 4 | Review Personal Information | Review the details in the Personal Information section. | The data for the personal change has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approvebutton to approve the personal information change request. | The system generates a message about the successful approval of the workflow. You are directed back to your Home page. The change in personal information becomes effective the date as entered in the system and can be viewed by the employee.   Note  In case you have approved the request starting from the My Workflow Request (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |

 Note

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

 Note

In case email is configured and the email address of the employee is maintained in the system, the employee receives an automatic email about the approval of his or her change in personal information.

 Note

In case at a later point in time, another change in personal information occurs, for which the employee also wants to attach a scanned document, he or she can proceed as follows:

* Log on to Employee Central as Employee and proceed as described in process step Entering Change in Personal Information, test steps # 2 to # 6.
* Before uploading an attachment to this new data record, delete the existing attachment first by pressing the Delete  icon. In the upcoming Delete File dialog box, choose OK.
* You can now upload a new document as described in process step Entering Change in Personal Information, second instruction in test step # 6. Continue with test steps # 7 to # 10.

After the change in personal information has been approved, the employee can view the history of his or her personal information as existing in the system. For this, the employee needs to select in the Personal Information block, located in the Personal Information subsection of the Personal Information section, the Clock (History) icon. In the Change History part of the upcoming Personal Information Changes dialog box, the existing history records of the personal information are listed. For each history record, the appropriate scanned document as attached by the employee will be incorporated as a hyperlink. The employee can select this <Attachment> hyperlink to view the uploaded document.

 Caution

Only in case integration with Employee Central Payroll is in place, the change in personal information 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).

## Maintenance of Employee’s Work Eligibility Data

 Caution

This chapter is only relevant for the following countries: AE, AU, CN, FR, SA.

For the above mentioned countries, the chapter is relevant only for employees, who are nationals of another country than the country where the company is located. This means:

* If country of company is AE, this chapter is valid only for employees with nationality other than Emirati.
* If country of company is AU, this chapter is valid only for employees with nationality other than Australian.
* If country of company is CN, this chapter is valid only for employees with nationality other than Chinese.
* If country of company is FR, this chapter is valid only for employees with nationality other than French.
* If country of company is SA, this chapter is valid only for employees with nationality other than Saudi.

Purpose

To be able to work in a foreign country, a non-national of that country needs to be in possession of a valid work permit. Details related to the work permit have been maintained during hiring or rehiring. An alert regarding the expiry date of the document type relevant for that country is configured: the employee, the employee’s line manager, and the employee’s HR business partner will receive an email informing them that the work permit document of the employee is getting expired soon and they need to trigger the process of prolonging it. The employee is responsible for keeping his or her work permit information up-to-date in the system. The updates in the work permit information by the employee needs to be approved by the employee’s HR Business Partner, before the data becomes effective in the system. For this purpose, the Relationship Type HR Manager must have been maintained for the employee before he or she maintains data related to the work permit document.

### Maintaining Work Permit Information

Test Administration

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

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

Purpose

The Employee maintains work permit information. The maintenance may be related to adapting an existing work permit record (for example, as result of an alert about the soon expiration of the existing document), or creating a new work permit record.

Prerequisite

The Relationship Type HR Manager must have been maintained for the employee in order for a workflow to be triggered.

Procedure

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Employee with nationality other than the one of the country where your company is located. |  | The Home page is displayed. |  |
| 2 | Select My Employee File | From theHomedrop-down, select the My Employee File*.* |  | The My Employee File screen is displayed containing your profile. |  |
| 3 | Go to Work Eligibility | Go to the Personal Information section and scroll there to the Work Eligibility subsection. |  |  |  |
| 4 | Adapt Existing Work Permit Information | To adapt the existing work permit information record. select the Pencil (Edit)icon in the Work Permit Info block. | To enter an additional work permit document, select the ⊕ icon in the Work Permit Info block. In the upcoming Work Permit Info dialog box, select the ⊕ Add Work Permit Info link, enter data as appropriate and choose the Save button. | The Work Permit Info dialog is displayed. |  |
| In the Work Permit Info block, maintain data as appropriate. Adapt, for example, the Expiration Date and upload a scanned copy of the document. |  |  |
| 5 | Save Data | Choose the Save pushbutton. | A workflow is triggered. The Please confirm your request dialog box appears on the screen. |  |
| 6 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request, if appropriate. |  |  |  |
| 7 | Check Approver | In the dialog box, select the Show workflow participants link to verify the approver of the request. |  | In case of a maintenance of work permit information, the request needs to be approved by your HR Business Partner. |  |
| 8 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed. The workflow has been sent to the next processor. |  |

 Note

In case email is configured and the email address of your HR Business Partner is maintained in the system, he or she receives an automatic email about the workflow item needing his or her attention.

 Note

The HR Administrator can also maintain the work permit data for the employee. For this, search for the employee and maintain the data as described in the procedure table above, starting with test step # 3. The system does not restrict the maintenance of work permit information based on the nationality. Hence, it is the responsibility of the HR Administrator to ensure that work permit information is maintained only for non-nationals of the country where the company is located.

### Approving Work Permit Information

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

The HR Business Partner of the employee approves the work permit information maintained by the employee. Until the update is approved, the proposed change is pending.

 Note

The HR Administrator can view the proposed change by selecting the Personal Documents Information change pending approval (<mm/dd/yy>) link in the Work Permit Info block of the employee’s profile.

Procedure

 Caution

In case of work permit maintenance, pay attention that the system does not restrict the maintenance based on the nationality. Hence, it is the responsibility of the employee’s HR business partner to approve work permit information only for non-nationals of the country where the company is located!

| 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 theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the request you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Request | On the Approve Requests dialog box, click on the Personal Documents Information 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 Request (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for Request Type value Add Work Permit Info and in Initiated By the name of the employee who has maintained his or her work permit information. Then choose the Go button. In the result list, click on the appropriate Personal Documents Information change for <Employee Name> link. | The Employee Files > Workflow Details screen is displayed, containing details to the change request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Personal Documents Information section contains all details related to the adaption of the work permit information. * In the Comment section, you can post your remarks to the request. * On the right part of the screen a short profile of the requesting employee is given, as well as administrative details to the request initiation. |  |
| 4 | Review Personal Documents Information | Review the details in the Personal Documents Information section. | The data for the work permit information adaption has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approvebutton to approve the work permit information. | The system generates a message about the successful approval of the workflow. You are directed back to your Home page. The change in work permit information becomes effective and can be viewed by the employee.   Note  In case you have approved the request starting from the My Workflow Request (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page.  In addition, an email notification is triggered to inform both the employee and his or her line manager about the approval of the work permit information. |  |

 Note

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

 Note

In the exceptional case that a national of the country where the company is located has maintained by accident work permit information, you must send the request back. Add a comment explaining your decision. Then choose the Send Backbutton. The employee can then withdraw the request.

#### Sending E-mail Notification about Work Permit Information Approval

Purpose

After the HR business partner of the employee has approved the work permit information updates submitted by the employee, an email is sent out to the employee and his or her line manager, notifying them about the change becoming effective in the system.

Prerequisites

The email address of the employee and his or her line manager need to be maintained in their employee files in the Contact Information block (located in the Contact Information subsection).

Procedure

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

#### Receiving E-mail Notification about Approval of my Work Permit Information

Purpose

The Employee has received an email notification informing him or her that the Add Work Permit Info action has been completed and the updates in the work permit information, he or she has maintained, have been approved.

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

#### Receiving E-mail Notification about Approval of Employee Work Permit Information

Purpose

The Line Manager of the employee has received an email notification informing him or her that the Add Work Permit Info action has been completed for the employee.

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

 Note

Once the expiry date of the maintained work permit document is approaching, a new alert will be triggered to inform the employee, the employee’s line manager, and the employee’s HR business partner.

# Country-Specific Fields

## Home Address

### United Arab Emirates (AE)

| User Entries: Field Name: User Action and Value |
| --- |
| Care Of: adapt as appropriate |
| Street: adapt as appropriate |
| House Number: adapt as appropriate |
| City: adapt as appropriate |
| District: enter as appropriate |
| Region: select from drop-down as appropriate |
| Postal Code: enter if applicable |
| Apartment: enter if applicable |
| Extra Address Line: adapt as appropriate |

### Australia (AU)

| User Entries: Field Name: User Action and Value |
| --- |
| Street and House Number: adapt as appropriate |
| Suburb/Town: adapt as appropriate |
| State: adapt as appropriate |
| Post Code: adapt as appropriate |
| Address Line 2: adapt as appropriate |

### China (CN)

| User Entries: Field Name: User Action and Value |
| --- |
| Detailed Address: adapt as appropriate |
| Street and House Number: adapt if applicable |
| City/Prefecture: adapt as appropriate |
| County /District: adapt as appropriate |
| Province: adapt as appropriate by selecting from drop-down |
| Postal Code: adapt as appropriate |

### Germany (DE)

| User Entries: Field Name: User Action and Value |
| --- |
| Street: adapt as appropriate |
| House Number: adapt as appropriate |
| District: adapt as appropriate |
| City: adapt as appropriate |
| Postal Code: adapt as appropriate |

### France (FR)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| House Number: enter if applicable |  |
| Street: adapt as appropriate |  |
| Extra Address Line: enter if applicable |  |
| City: adapt as appropriate |  |
| Department: select from drop-down |  |
| Postal Code: adapt as appropriate |  |
| Municipality INSEE Code: enter as appropriate | This refers to the municipality where the employee lives and is needed for the N4DS statutory requirement in France. |

### United Kingdom (GB)

| User Entries: Field Name: User Action and Value |
| --- |
| Street and House Number: adapt as appropriate |
| Address Line 2: enter if applicable |
| District: adapt as appropriate |
| City: adapt as appropriate |
| State: adapt as appropriate |
| Postal Code: adapt as appropriate |
| County: adapt as appropriate |

### Kingdom of Saudi Arabia (SA)

| User Entries: Field Name: User Action and Value | Additional Information |
| --- | --- |
| Addressee: enter if applicable | Care of. |
| Street: adapt as appropriate |  |
| Extra Address Line: enter if applicable |  |
| Region: enter as appropriate |  |
| Postal Code: enter as appropriate |  |
| District: enter if applicable |  |
| House Number: adapt as appropriate |  |
| Apartment: enter if applicable |  |
| City: adapt as appropriate |  |

### United States (US)

| User Entries: Field Name: User Action and Value |
| --- |
| Address Line 1: adapt as appropriate |
| Address Line 2: enter if applicable |
| City: adapt as appropriate |
| State: adapt as appropriate |
| ZIP: adapt as appropriate |
| County: adapt as appropriate |

# 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 user can activate the SAP SuccessFactors Mobile application:

* HR Business Partner of the employee

Procedure

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

 Note

If required, you can also send the request back for further details. In this case, it is recommended to add a comment explaining your decision. Then tap Send Back. The request initiator can then either adapt the 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 SAP SuccessFactors Employee Central Payroll is in scope and the data maintained is replication relevant, the employee data is transferred from SAP SuccessFactors Employee Central to SAP SuccessFactors Employee Central Payroll and can be viewed there. |

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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